Wild Apricot

HELP

version 5.12

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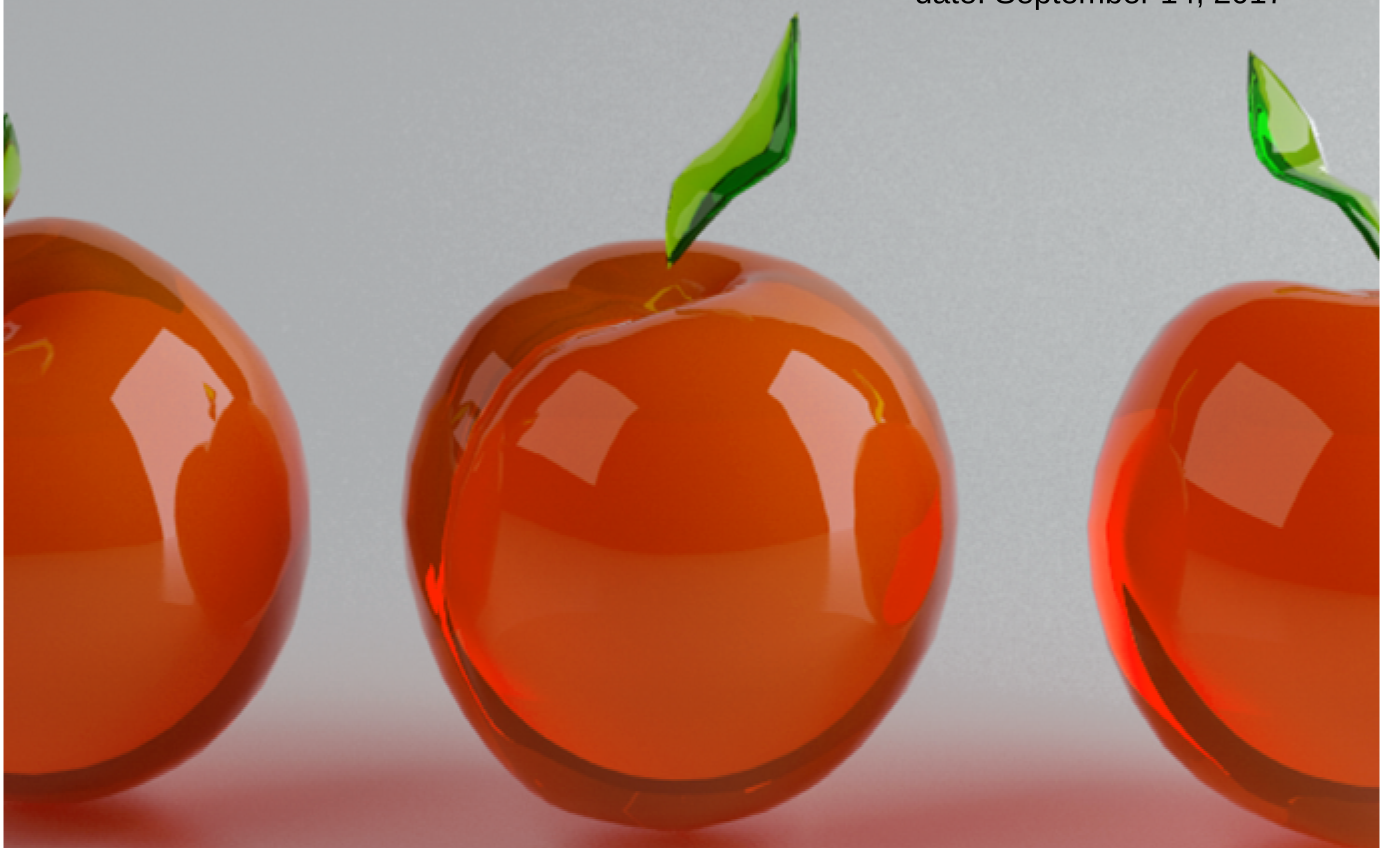

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Home

Wild Apricot help

Get started with...

- Wild Apricot
- Websites
- Events
- Membership management
- Quick start setup guide

Get more help

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- Support
- User forums

Need one-on-one help?

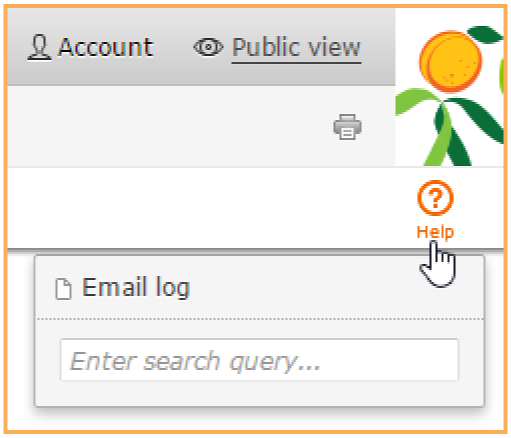
You can call or email our Support department.

Most popular pages

- Functionality by billing plan
- Managing site administrators
- Website themes
- Online payments
- Membership application form
- Sending email blasts
- Membership levels
- Custom domain setup
- Customizing database fields
- Adding Wild Apricot functionality to other websites
- Recording payments and credits and settling invoices
- Membership renewal settings
- Recurring payments
- PayPal account setup
- Importing members and other contacts
- Customizing colors and styles
- Contacts vs members

Get help for your current screen

To get help for the screen you're currently on, hover over the **Help** icon in the upper right corner of admin view, and click the topic that appears.



You can search the entire help system by entering keywords in the search field.

Getting started with Wild Apricot

Getting started with Wild Apricot

For an abbreviated step-by-step guide to setting up Wild Apricot, see our Quick start setup guide.

What is Wild Apricot?

Wild Apricot is web-based software that automates and simplifies the management of your membership and your website.

Read more/less

Wild Apricot consists of several modules that work together:

- membership management
- website (CMS)
- event registration
- online payments
- emails
- donations

You can access your Wild Apricot account from anywhere with a browser and an Internet connection. If you have volunteers and board members working from home or from different offices, they can all access the same data at the same time without updating and emailing membership lists back and forth.

Through your Wild Apricot website, tour members can access member-only pages, and perform self-service functions such as updating their membership profile, renewing membership, and paying invoices online.

You can store information in your database about other kinds of contacts other than members, such as donors or event attendees. Contacts can be added to your database through online forms, manually by administrators, and in bulk by importing. You can customize your contact database – and the forms that appear on your Wild Apricot site – by adding, modifying, reordering, and deleting database fields.

To get you started, your Wild Apricot website is already set up with sample contact records and sample pages such as membership application and event registration. You can create new pages and modify existing ones, and customize the look, feel, and functionality of the site. If you already have your website, you can add Wild Apricot forms and functionality to your existing site.

How do you and your members access your Wild Apricot site?

Both you and your members log into Wild Apricot from your Wild Apricot site, not www.wildapricot.com .

Read more/less

If you do not remember your Wild Apricot website address, check your email inbox for the welcome email that was sent to you when you signed up for the account. You can change your free Wild Apricot name at any time (e.g. to newname.wildapricot.org) or use your own custom domain (such as your-organization.com).

You can set up additional administrator accounts for your staff and volunteers, and assign them appropriate administration rights (see Managing site administrators).

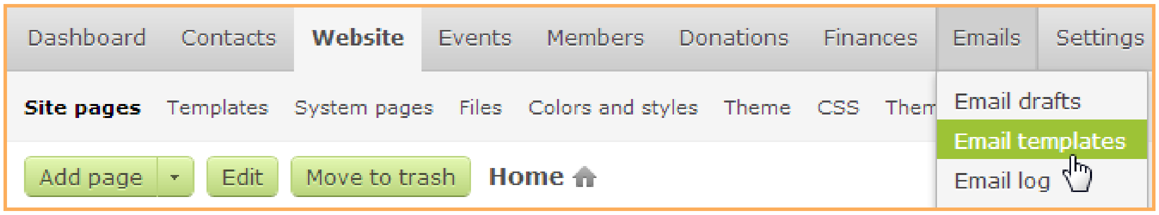
Public visitors to your site can view the pages you have made visible to everyone, including event registration and membership application forms. Members can view member-only pages and access online self-service functions such as updating their membership profile, checking membership status, renewing membership, and paying invoices online.

Getting around in Wild Apricot

Wild Apricot admin screens are grouped into pull-down menus according to their functional area.

Read more/less

You can jump to another admin screen by selecting the appropriate option from the menu.



A number of administrative options also appear within the admin logo area in the upper right corner of admin view.

You can use these options to switch between admin and public views, print, view help, request support, view account information, and log out.

For more information, see Navigating Wild Apricot.

Working with contacts

Everyone in your Wild Apricot database is a *contact* . A contact can be a member, an event attendee, a donor, a newsletter subscriber, or any combination of these roles.

Read more/less

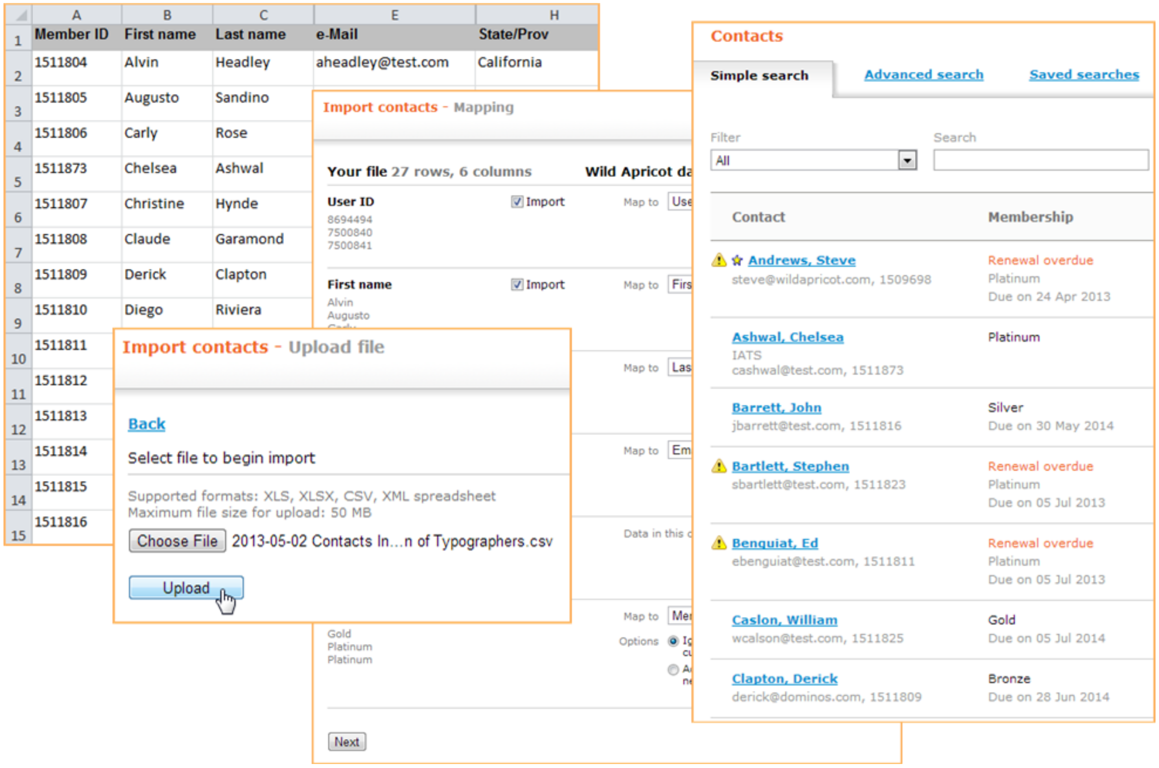
Information about each contact is stored in a separate *record*, with each record storing different chunks of information in *fields* (e.g. first name, last name, email address).

You can customize your contact database – and the forms that appear on your Wild Apricot site – by adding, modifying, reordering, and deleting database fields. In addition to their contact record, each contact can also have a membership record, and one or more event registration records or donation records.

Members are considered contacts but are different from other contacts because they have a membership level assigned to them and have additional information stored in membership fields.

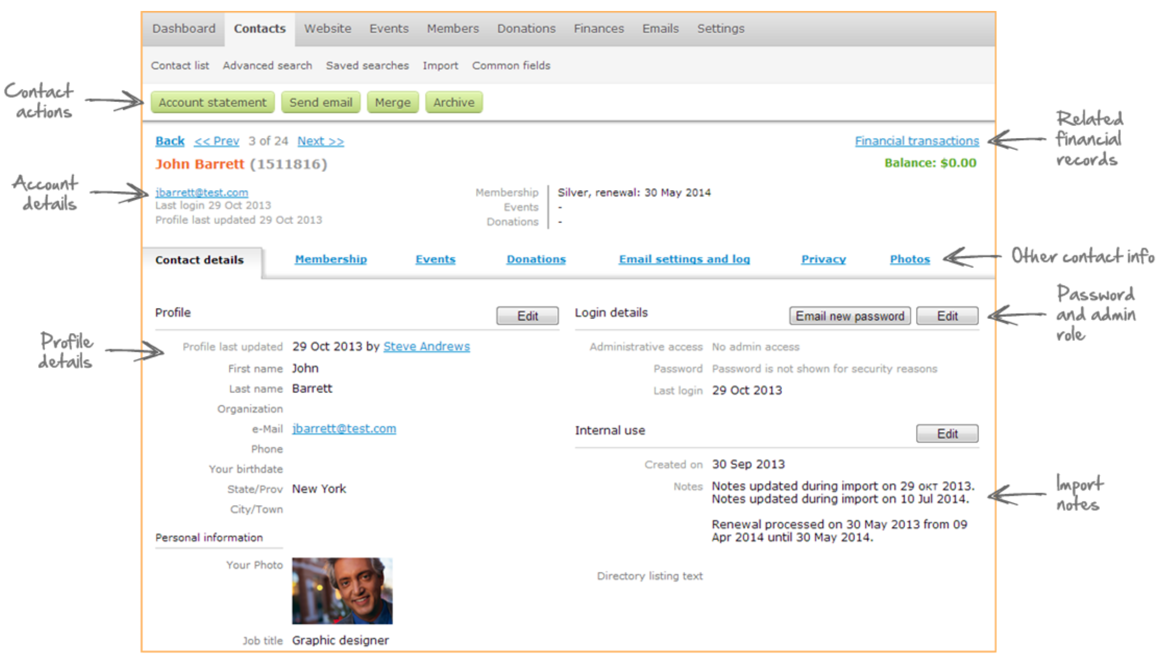
From your contact list you can find, search, and filter all of your contacts to update records, send out email blasts, and export your records. You can also save searches to reuse them in the future.

To get started, you can import your existing contacts/members.



Contact records are created automatically when people sign up for a membership (see Membership application form), register for an event (see Publishing your event calendar), subscribe to a newsletter (see Email subscription form) or make donations (see Donation forms).

For each contact, you can view full details and all related activity (e.g., registrations, donations, event attendance, etc.) from their contact record.



Managing your membership

On your Wild Apricot site, members can access member-only pages and perform various self-service functions, such as renewing their membership, and updating their email preferences and privacy settings.

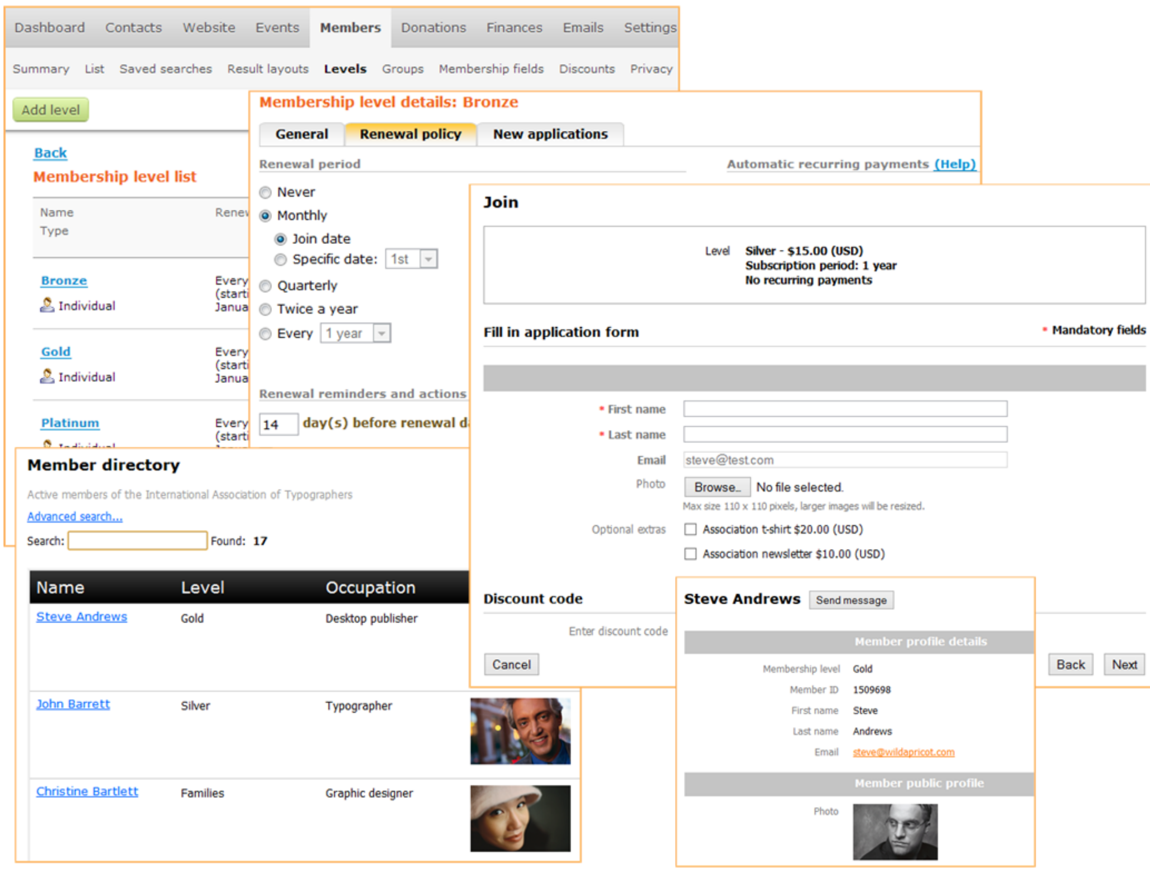
Read more/less

What most distinguishes members from other contacts is that members are assigned to membership levels. You can create multiple membership levels, each with different membership fees, subscription periods, renewals policies, and benefits. You can limit access to events, web pages, and database fields by membership levels. For each membership level, you can set the membership fee and decide on the membership renewal process. You can fully or partially automate the renewal process.

If you want to offer group memberships to companies, teams, or families, you can set up a membership bundle level, rather than an individual level.

So that visitors to your site can apply for membership in your organization, you need to add a membership application form to your website, if it isn't there already. I'll show you how to embed an application form on another site a little later on. The fields that appear on the membership application form are drawn from your membership fields and common fields. You can create custom membership fields and restrict them to specific membership levels.

So that visitors to your site can see a list of your members, search for members, and view member profiles, you can add a member directory to a page on your site. Clicking on a member listing within the directory will display that member's profile (subject to their privacy settings).



Setting up your Wild Apricot site

Each Wild Apricot account provides a website , hosting for the website, and the tools – known collectively as a Content Management System (CMS) – to set up and manage the website.

Read more/less

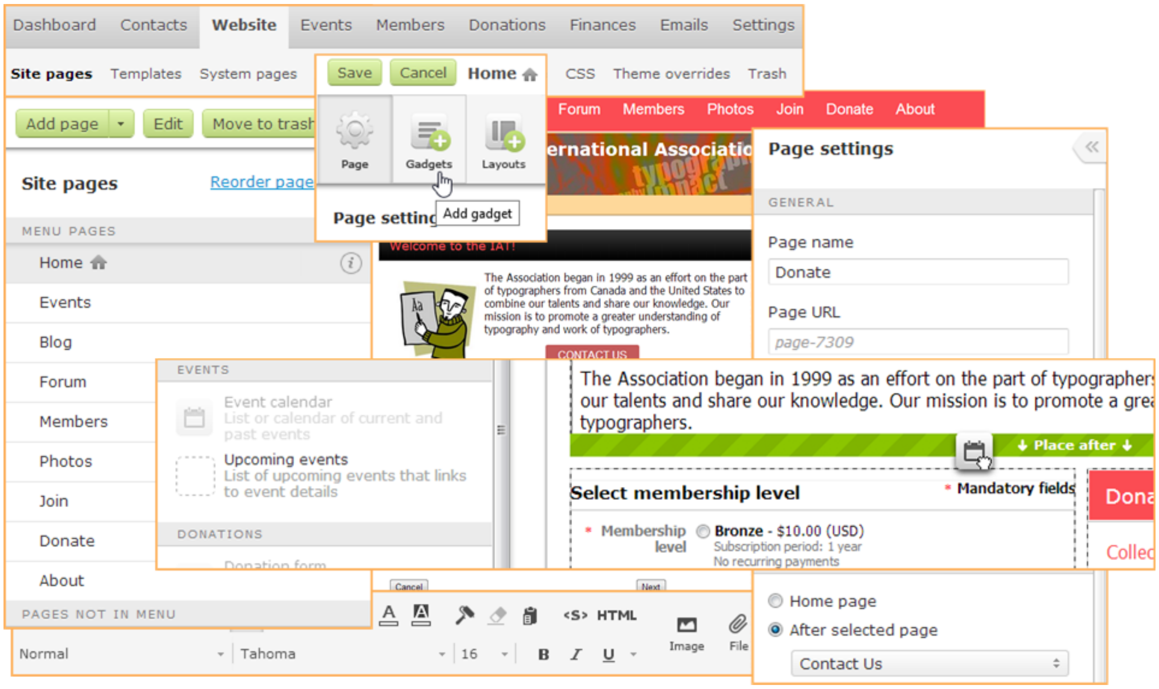
By default, your site is already set up with several useful pages, including a membership application form and an event calendar.

You can quickly and easily create new pages and modify the default ones, and customize the look, feel, and functionality of the site using interactive tools provided by Wild Apricot. You can add as many site pages as you want, and group site pages under one another to form multi-level menus.

When you add a new page, you can select the page template whose content and layout the new page will inherit. You can set up multiple templates, each with its own layout and shared content. Each page can be based on a different template, and multiple pages can share the same template.

For each page, you can control various page settings, including page name, URL, access permissions, and meta-tags. You can also control whether the page appears in your site menu.

You can design pages to display dynamic content from your Wild Apricot database, or static content that you add directly using an editor. You can add custom HTML to embed external content or third-party widgets.



The overall look of your site depends on which website theme you choose. A default website theme is assigned when you create your Wild Apricot account. You choose a different website theme from a gallery of professionally designed themes, then customize your theme in a variety of ways.

For experienced website designers and developers, Wild Apricot provides additional tools for advanced customization and fine-tuning of your Wild Apricot website.

Setting up and managing events

With Wild Apricot's events module , you can set up any number of events and publish them in an events calendar on your Wild Apricot site (or another website).

Read more/less

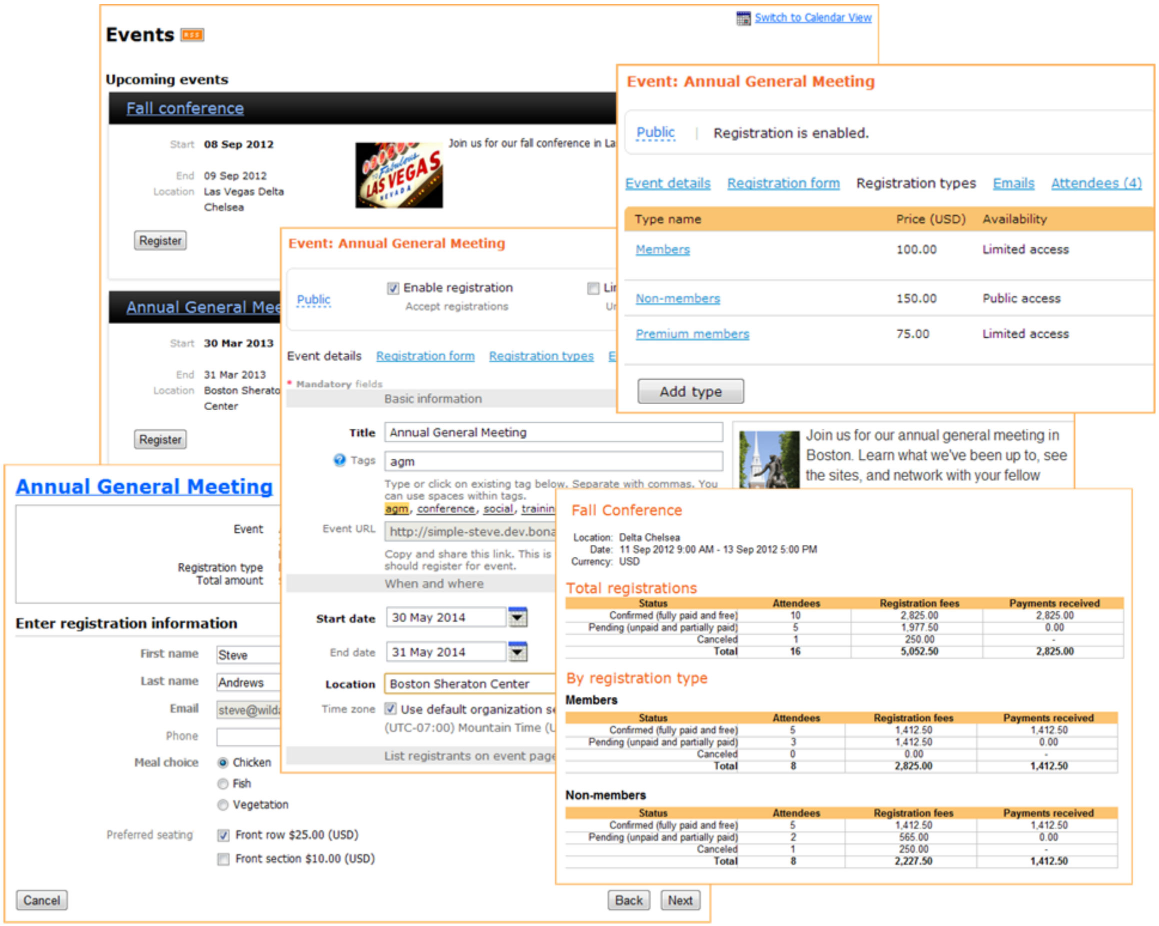
From the events calendar, visitors can view event details, sign up for events, register guests, and pay registration fees online.

You can organize various types of events, including:

- conventions, conferences, and seminars
- board meetings
- training sessions and webinars
- social events

Wild Apricot allows you to customize the events calendar page, the event registration form, and the event emails (announcements and reminders). You can use the registration form to collect information about attendees (like meal preferences and breakout session choices) and to provide additional event options (like golf or concert tickets) available at a separate cost.

You can restrict each event to selected membership levels, and set up multiple ticket types – aka registration types – so you can charge different prices for different event packages or for different kinds of attendees.



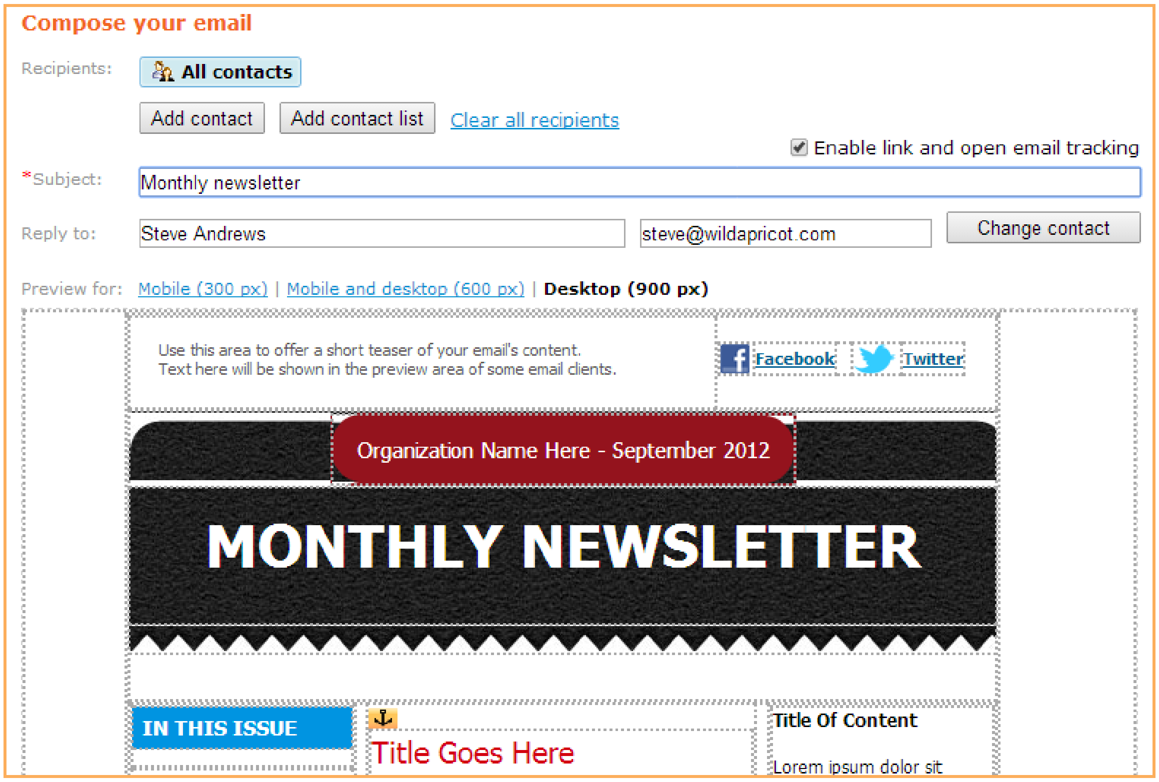
Sending email blasts

You can use Wild Apricot to send mass emails – such as newsletters and announcements – to people in your contact database. You can send an email blast immediately or schedule it to be delivered automatically at a particular date and time.

Read more/less

You can control who receives your email blasts by searching or filtering your member list or contact list.

You can create your email blasts from scratch, use a previously sent email, or choose one of the professionally designed email templates provided by Wild Apricot. In either case, you can add text, formatting, graphics, and links to the message. To personalize the message, you can use macros to insert specific information such as the recipient's first name or organization. You can also use macros to insert an unsubscribe link.



After you've sent your email blast, you can track opened, clicked, and undelivered mail, and review email failures.

Keeping track of finances

Invoices are automatically generated for all transactions on your Wild Apricot site.

Read more/less

You can view and manage invoices – and payments – from the Finances module. You can search for invoices and payments or filter each list to display certain types of transactions, or transactions within a certain time period.

Using the Finances module, you can:

- Look up the transaction (e.g. membership application or event registration) that generated a particular invoice
- Track online and offline (manual) payments, including payment method (tender)
- Export your financial transactions to QuickBooks
- Generate financial reports including income report, payments report, and aging receivables report

Contacts can also view a full history of their payments and invoices (see View account history and pay invoices).

Accepting donations

You can set up your Wild Apricot site to accept donations, so visitors to your site can provide financial support to your organization.

Read more/less

Donations can be made through a donations page on your site or recorded manually by administrators.

Once a donation is processed, it can be modified, deleted, or refunded. You can view a list of donations by date or by donor, and export the donations records to a spreadsheet.

To track your fundraising efforts, you can add a donation goal gadget to a page on your site. The donation goal gadget displays a progress bar that measures progress towards your financial goal.

For more information, see Managing donations.

Online and offline payments

You can set up your Wild Apricot account to accept online payments for various transactions on your website – membership dues, event registration, donation, and other invoice payments.

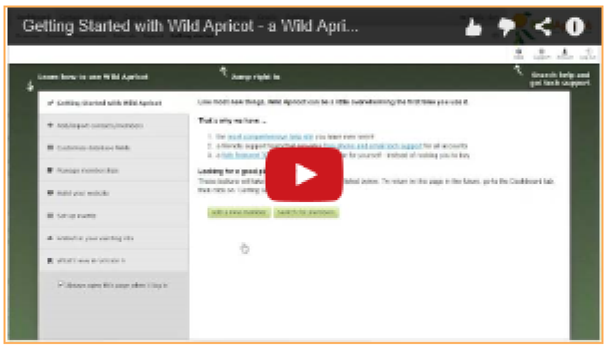
Read more/less

For membership dues, you can set up recurring payments – automatically charge credit cards on a regular basis – depending on your payment system. You can also manually record offline payments – payments received outside of Wild Apricot (e.g. check, cash, wire transfer, or credit card payments charged outside of Wild Apricot). Every payment recorded in Wild Apricot automatically generates a receipt.

You can look up recorded payment details and process refunds. A refund can be processed manually by an administrator or automatically when Wild Apricot receives a refund notification from your online payment processor.

Payments can be classified by *tender* – the method by which payment was received. For online payments, tender is recorded automatically (e.g. *Online - Authorize.Net credit card payment*). For manual payments, you can select the tender when the payment is recorded (e.g. *Cash* or *Checking account*). You can customize the list of tenders as needed. For more information, see Payment tenders.

Online payments are automatically matched to appropriate invoices. For information on manually matching payments to outstanding invoices, see Record payments and settle to invoice.



Getting Started with Wild Apricot (24:57)

On this page:

- What is Wild Apricot?
- How do you and your members access your Wild Apricot site?
- Getting around in Wild Apricot
- Working with contacts
- Managing your membership
- Setting up your Wild Apricot site
- Setting up and managing events
- Sending email blasts
- Keeping track of finances
- Accepting donations
- Online and offline payments

Expand all sections

See also:

- Quick start setup guide
- Videos
- Glossary of terms
- Support
- Community forums

Quick start setup guide

Quick start setup guide

The following is a checklist of steps you should consider performing to properly set up your Wild Apricot account. In each case, the step links to a help topic that provides detailed instructions.

Before you begin

Click/tap to expand/collapse

1. Check your browser compatibility

   Make sure your browser is supported for administrative functions.

2. Check your account limits

   Some Wild Apricot functionality is only available for certain billing plans.

3. Log into your account

   You have to log into your own Wild Apricot site – not www.wildapricot.com – if you want to perform administration functions, access member only pages, or perform member self-service functions.

Account administration

Click/tap to expand/collapse

1. Set your organization details

   Change your organization's name, time zone, and email address. Your time zone is used to schedule the sending of emails and the timing of events.

2. Designate your site administrators

   Decide which users can perform administrative functions such as modifying site pages, adding events, and customizing the contact database.

3. Set up system email routing

   Control which administrators or other recipients are automatically sent copies of system emails.

Membership

Click/tap to expand/collapse

1. Modify the default membership email templates

   You can modify the default renewal reminders and membership confirmations for all membership levels.

2. Set up membership levels

   You can set up multiple membership levels, each with different membership fees, subscription periods, renewals policies, and benefits.

3. Customize membership emails for individual membership levels

   You can customize the renewal reminders and membership confirmations for individual membership levels.

4. Customize your contact database fields

   You can customize your contact database – and thereby your membership application form – by adding, modifying, reordering, and deleting database fields.

5. Add/import members/contacts

   You can add members and other contacts to your database manually one at a time or import them in bulk from a spreadsheet.

6. Set your member privacy options

   Control what membership information will appear to the public and other members on member directories, forum posts, and blog entries, and whether member photo albums are visible to other members and non-members.

7. Set up a membership application form

   Setting up a membership application form allows visitors to your site to add themselves to your contact database as members.

Finances

Click/tap to expand/collapse

1. Choose how you want to accept payments

   You can integrate an online payment system into your Wild Apricot site so you can accept online payments for membership dues, event registrations, donations, and other invoice payments, or just accept manual payments such as check, cash, or wire transfer.

2. Set up sales taxes or VAT

   You can set up sales taxes or VAT and automatically apply them to transactions.

3. Customize your invoices and receipts

   You can customize the invoices and receipts that are generated automatically by Wild Apricot or issued manually by administrators.

4. Set up your payment tenders

   Payment tenders indicates the method by which a payment was received, allowing you to classify payments by type.

Website

Click/tap to expand/collapse

1. Decide on your domain name

   Change your free Wild Apricot domain name or use a custom domain name instead.

2. Select your website theme

   Choose the theme that determines the look and layout of your Wild Apricot site.

3. Create and design your site pages

   Add, manage, and modify the pages that appear on your Wild Apricot site.

4. Review your page settings

   From the page settings, you can control page order, access, visibility, name, URL, and meta-tags.

5. Customize the appearance of your website

   Use the interactive tools or advanced customization methods to control the look and feel of your site.

6. Decide on your traffic encryption options

   Provide secure access to your website using traffic encryption.

Events

Click/tap to expand/collapse

1. Customize your event email templates

   Customize the templates used as the basis for event announcements and reminders.

2. Set up your events

   Specify event details, event categories, and registration types, customize the registration form and event emails.

3. Set up your event calendar(s)

   Add one or more event calendar pages to your Wild Apricot site so visitors can register for events.

On this page:

Expand all sections

Browser compatibility

Browser compatibility

Compatible browsers

Each new version of Wild Apricot is tested with the latest available version of each browser. We also retest Wild Apricot, as soon as we can, whenever new browser versions with major changes come out.

For best results with Wild Apricot, please one of the following browsers, on Mac OS X or Windows:

Firefox

Click/tap for details

- Use latest version.

Internet Explorer

Click/tap for details

Versions 10 or later of Internet Explorer are fully supported.

- Clients have reported a number of issues using Version 11 of Internet Explorer with Wild Apricot.
- Versions 8-9 of Internet Explorer are supported for public and member access, but not for administrative functions.
- The content editor is not supported for Version 9 of Internet Explorer, for either administrative or public use.
- When uploading multiple files to the Files screen using Internet Explorer 10, the first file selected will not be uploaded.

Microsoft Edge

Click/tap for details

- Currently unable to upload files using this browser, whether from file management or when importing contacts or uploading to photo albums

Google Chrome

Click/tap for details

- Use latest version.
- Images cannot be resized by dragging the edges/corners. You can still specify size in the **Insert picture** dialog.

Safari

Click/tap for details

- Use latest version.
- Images cannot be resized by dragging the edges/corners. You can still specify size in the **Insert picture** dialog.
- In Safari 4.0.5, when viewing the member profile page in widget mode, logout may not work. Make sure that you are set to always accept cookies. Check your browser setting and make the following adjustments if necessary:
  Preferences -> **Security** -> **Accept Cookies: Always**

Other browsers

Click/tap for details

Other browsers may work well for visitors to your site but would likely not support all administrative functions. Mobile browsers, in particular, do not provide support for crucial administration functions such as email editing and page setup.

Additional requirements

Click/tap to expand/collapse

Screen Resolution
Wild Apricot system requires a minimum screen resolution of 1024x768.

JavaScript
Required. For instructions on turning on JavaScript, see How to Turn on Javascript in Internet Browsers.

Cookies
Must be enabled. For instructions on enabling cookies, see How to Enable Cookies in Your Internet Web Browser.

Code to embed Wild Apricot widgets on another website that was copied before June 27, 2013 requires visitors to the site to accept third-party cookies. Widget code copied after that date does not require third-party cookies to be accepted.

Trusted Zone
Optional. If you use Internet Explorer and have enabled high security settings, you may wish to add your Wild Apricot site to your Trusted Zone list to ensure that Wild Apricot features aren't accidentally blocked. For instructions on adding sites to Internet Explorer's Trusted Zone, see How to Add a Website to Trusted Sites.

On this page:

- Compatible browsers
- Additional requirements

Expand all sections

See also:

- Mobile access

Logging into your account

Logging into your account

You have to log into your Wild Apricot account if you want to:

- perform administration functions
- access member only pages
- perform member self-service functions (see Online self-service).

> New members are automatically logged in after supplying their email address when they apply for membership, register for an event, or make a donation.

You and your members can log into your Wild Apricot site using your Wild Apricot credentials, or using your Facebook or Google+ credentials.

Where do I log in?

You can log in from your Wild Apricot site, or from wildapricot.com.

Read more/less

Logging in from your Wild Apricot site

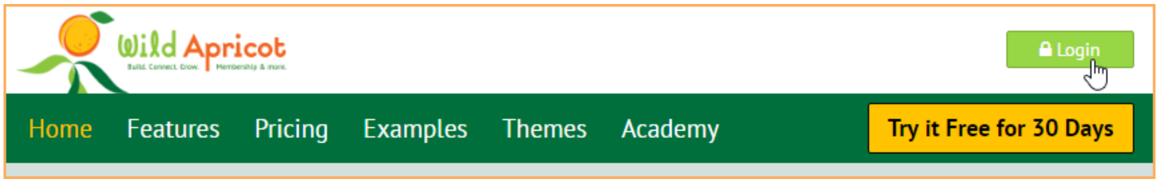
Where you log in on your Wild Apricot website will depend on your site's theme. You might click a **Login** link that leads to a login page...

... or enter your login information directly into login boxes that appear on the home page.

If you do not remember your Wild Apricot website address, check your email inbox for the welcome email that was sent to you when you signed up for the account. If you did not receive an email, check your email spam folder.

Logging in from wildapricot.com

If you don't remember your Wild Apricot site address, you can go to www.wildapricot.com and click the **Login** button in the upper right corner.



You will be prompted to log in using your email address and password. If you have multiple sites associated with your login credentials, you will be prompted to select the site you want to log into.

Entering your login credentials

In the log in fields, you enter your Wild Apricot credentials – email and password – then click the **Login** button. You can also allow your members to log in using their Facebook or Google+ credentials.

Read more/less

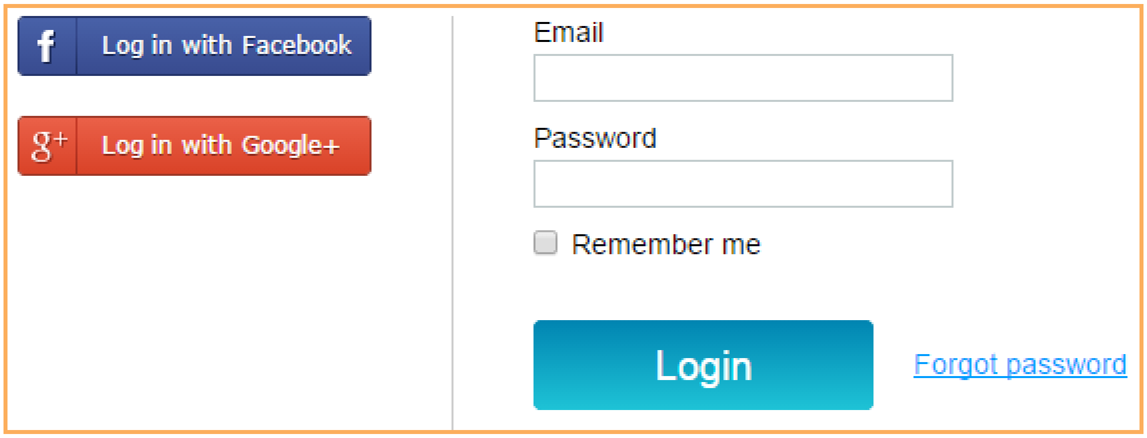
If you do not remember your password, click the **Forgot password** link next to the **Login** button. On the page that appears, you can enter your email address to receive a reset password link via email.

> ⓘ Administrators can customize the reset password link request page by modifying the **Reset password request** system page. They can also modify the reset password page that the link leads to by modifying the **Reset password** system page

Your members log in using the password automatically sent to them when they signed up as a member or event attendee. If you added a member or contact manually, or imported them using a spreadsheet, a password email is not automatically sent, but you can send it manually from their contact details. For more information, see Emailing passwords.

If you enable **Options to log in via social networks** within the log in form gadget settings, then **Log in with Facebook** and **Log in with**

Google+ buttons will appear on the log in form.



These buttons will also appear on the **Authorization required** system page that appears when someone clicks the **Login** button within a log in button gadget, and at the bottom of each private member profile.

> ⚠ Social login buttons will not appear on the **Authorization required** system page when someone clicks the **Login** button from a widget rather than a gadget.

When a visitor clicks one of the social network login buttons, they will be prompted to sign into the corresponding social network. If they are already logged into their social network using the same email address associated with your Wild Apricot site, clicking the button will automatically log them into their Wild Apricot account.

Once you are logged in via a social network, your social network details – including your network name and avatar – will be displayed within the **Social network login** section of your private member profile.

If you use a different email address for your social network account, you can click the **Connect** button to log into your social network. To disconnect from your social network without logging off from your Wild Apricot account, click the **Disconnect** link from your member profile.

Removing the social login buttons

You can remove the social login buttons that appear on the log in form gadget and on the **Authorization required** system page.

Read more/less

To remove the social login buttons from the log in form gadget, you disable **Options to log in via social networks** within the gadget settings.

To remove the social login buttons from the **Authorization required** system page, add the following code to the CSS customization scre en:

```
.WaGadgetAuthorizationRequired .openAuthFormContainer {
display: none !important;
}
```

To remove the buttons from private member profiles, use the following code:

```
#socialLoginContainer, #idSocialLoginContainer {
 display: none;
}
```

Logging in from a secure page

If you want to use a secure page to log into a Wild Apricot site that uses the *wildapricot.org* domain, simply add *s* to *http* in the URL of your Wild Apricot site.

Read more/less

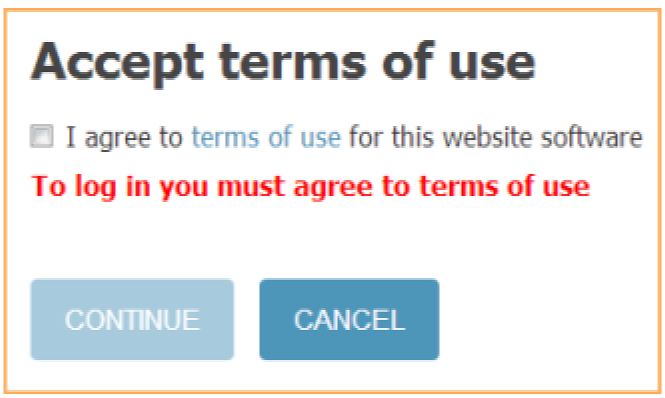
For example, instead of logging in from http://nycs.apricot.org, you'd log in from https://nycs.apricot.org. If your Wild Apricot site uses a different domain, you can still use the wildapricot.org domain to access a secure login page.

For more information on providing secure access to your website, see Traffic encryption.

Accepting the terms of use

When you first log into Wild Apricot, you will be required to accept Wild Apricot's terms of use before proceeding.

Read more/less



An administrator can customize this page by modifying the **Terms of use** system page.

After you log in

After you log in, a message will appear in the bottom right corner if you have unpaid invoices or incomplete registrations, or are lapsed, overdue, or within a week of your renewal date.

Read more/less

What you see and what you can do after logging in may depend on whether you're a member, and if so, your membership level and membership status.

Logging in automatically

To avoid having to enter your email and password every time you log in, check the **Remember me** option before clicking the **Login** button.

Read more/less

When you next restart your browser and access your Wild Apricot site, you'll be automatically logged in.

> You'll be logged in automatically only on the computer you used when you checked the **Remember me** option. Wild Apricot remembers you by depositing a *cookie* (a small text file) on your computer.

Some browsers may also offer to remember your login information. To stop your browser from remembering your login information, you need to clear (i.e. delete) your browser cookies. For instructions on clearing browser cookies, click here.

Browser add-ons for managing and remember passwords – like Last Pass – can be used to remember both the email and password for Wild Apricot sites.

> For security reasons, you shouldn't ask Wild Apricot to remember you on shared or public computers.

Specifying landing pages

Where someone ends up after they log in – and accept the terms of use, if applicable – depends on whether they are an administrator, and whether they have any open invoices.

Read more/less

Administrators will end up in Wild Apricot's admin view. Members with open invoices will be directed to the **Invoices and payments** tab in their member profile. If their membership renewal date has passed, they will be directed to the **Profile** page where they can renew their membership.

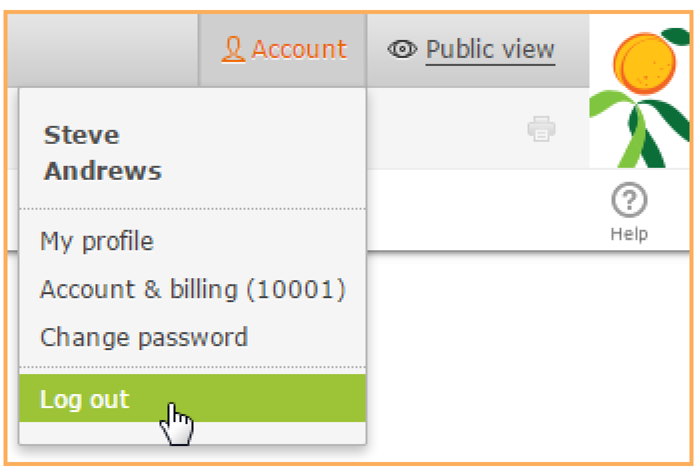
For all other members, administrators can specify a starting page where members will land after logging in and accepting the terms of use. You can specify a default starting page, and override the default page by specifying starting pages for specific membership levels. For more information, see Specifying the starting page for members.

Logging out

To log out of your Wild Apricot account, click the **Log out** link or icon.

Read more/less

In admin view, the **Log out** option appears within the Account menu in the upper right corner of the screen.



Where the **Log out** link appears in public view depends on the layout of your site.

Once you are logged out, you will see your site as a non-member does. Member-only pages will not be available.

Troubleshooting

I hid my login box on my website. How do I log in now?

To access your site, add */sys/login* to the end of your site address. For example, if your site address is *nycs.wildapricot.com*, you could log on at *nycs.wildapricot.com/sys/login* .

I submitted a password reset request but I did not receive any email

If you don't receive the password reset email, you should check the following:

- Your email spam folder - make sure to white list this email so that future emails will go to your inbox
- If you have set up Wild Apricot to use your own custom domain name (see Custom domain setup), you have to make sure that it is set up with the correct SPF record and SPF settings

When I click on the link in the email, I get a "404 - Page not found" page

This problem is related to incorrect custom domain set up. Make sure that it is set up as described on our Custom domain setup help page.

When I click on the link in the email, it does not work; it says that it is expired?

For security reasons, the password reset link is only valid for 24 hours. After this you will need to use the **Forgot password** link again.

On this page:

Expand all sections

See also:

- Setting and changing passwords

Setting and changing passwords

Setting and changing passwords

To log into your Wild Apricot account – as an administrator, member, or other contact – you need to enter your email address and password. Passwords are automatically generated and emailed by the system when someone creates a Wild Apricot account by signing up as a member, donor, or event attendee at a Wild Apricot site, or they can be set by an administrator manually or through import.

Passwords can be changed by an administrator, either manually or through import, and can be changed or reset by the contact. If an administrator change a contact's password or adds a contact manually, an email containing the password can be sent from the contact record.

Password requirements

- Minimum of 7 characters
- Maximum of 50 characters
- Any combination of letters, numbers and characters (except spaces)

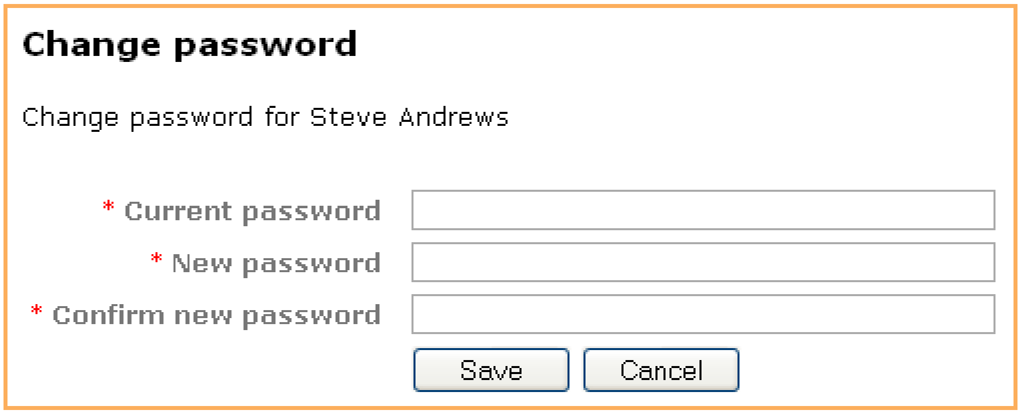
Wild Apricot passwords are case sensitive.

Changing the password by a contact

A member or other contact can change their password by clicking the **Change password** link that appears below or beside the link to their profile after the member logs in.

Read more/less

On the screen that appears, the contact enters their current password, then the new password, and the new password again for confirmation.

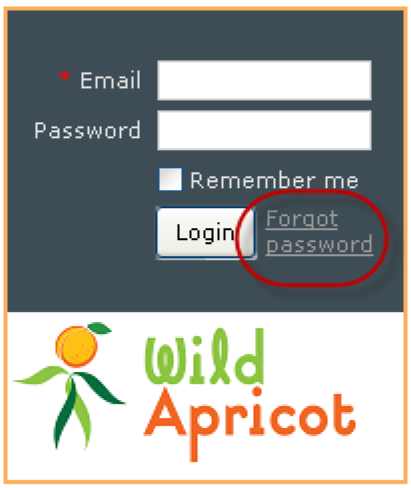


You can customize the appearance of this screen by modifying the **Change password** system page.

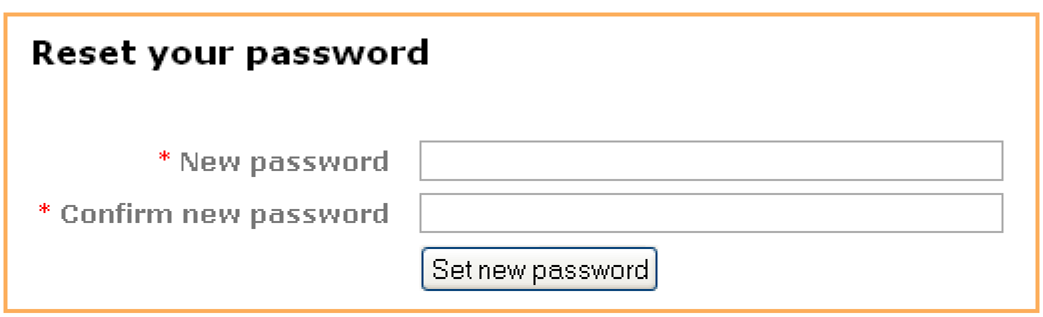
Resetting the password by a contact

If a member or other contact forgets their password, they can click the **Forgot password** link that appears beside the **Login** button on the login screen.

Read more/less



On the screen that appears, the contact enters their email address and clicks the **Submit** button.



An email will be sent to the address they entered with a link they can click to change their password. For security reasons, the link will expire within 24 hours of the message being sent.

Administrators can customize the reset password link request page by modifying the **Reset password request** system page. They can also modify the reset password page that the link leads to by modifying the **Reset password** system page

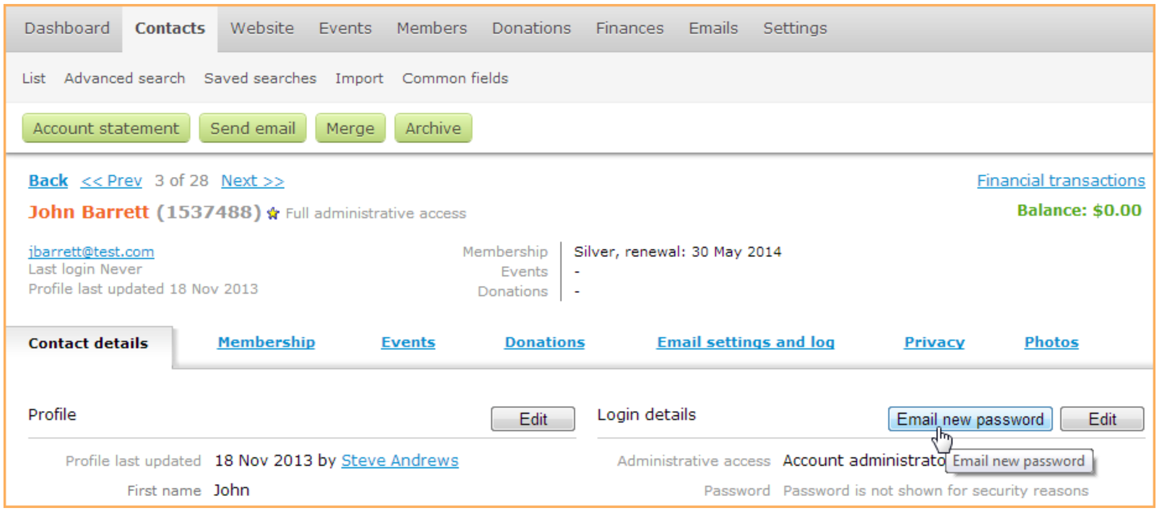
Emailing password resetting instructions

If you want to send an email to one or more of your contacts with instructions on resetting their passwords, include the **{Contact_Password _Reset_URL}** macro in your message. Your contacts can click the link to reset their password.

Emailing passwords

When you add a contact manually, you can generate and email a new password to the contact by clicking the **Email new password** button from the contact's **Contact details** tab on their contact record.

Read more/less



Password emails are not automatically sent by the system when you import or manually add a member or contact.

You can customize the password email using the instructions below.

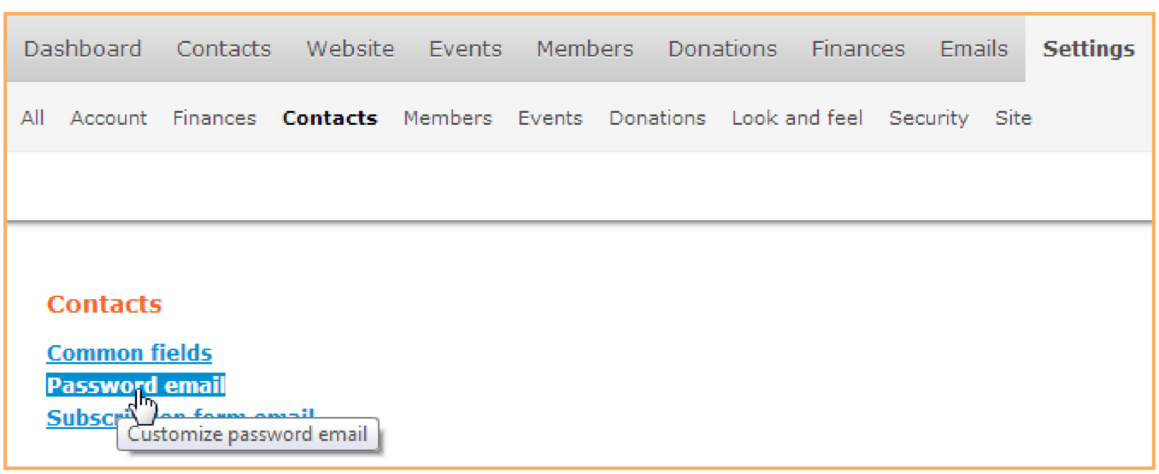
Customizing the password email

When a member or other contact signs up at your Wild Apricot site, an email is automatically sent to them with their password and other login information.

Read more/less

The password email is also sent when an administrator clicks the **Email new password** button from the contact's **Contact details** tab on their contact record.

To customize the password email, hover over the **Settings** menu and click the **Contacts** option. Under the Contacts settings list, click **Pa ssword email**.



On the screen that appears, click **Edit** to enter edit mode. Within the email template, you can add or replace text, links, pictures, and mac ros using the options appearing on the toolbar.

To choose a previous email or an email template as the basis for the email, click the **Copy from** button. To restore the original pre-modified version of the email – the factory default – click the **Restore default** button.

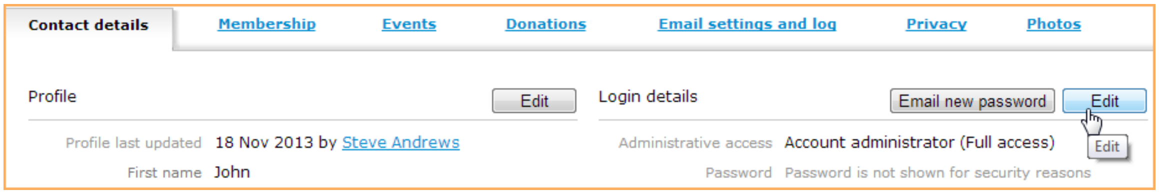
Changing the password by an administrator

An administrator can change the password for a member or other contact from the contact record or in bulk through import.

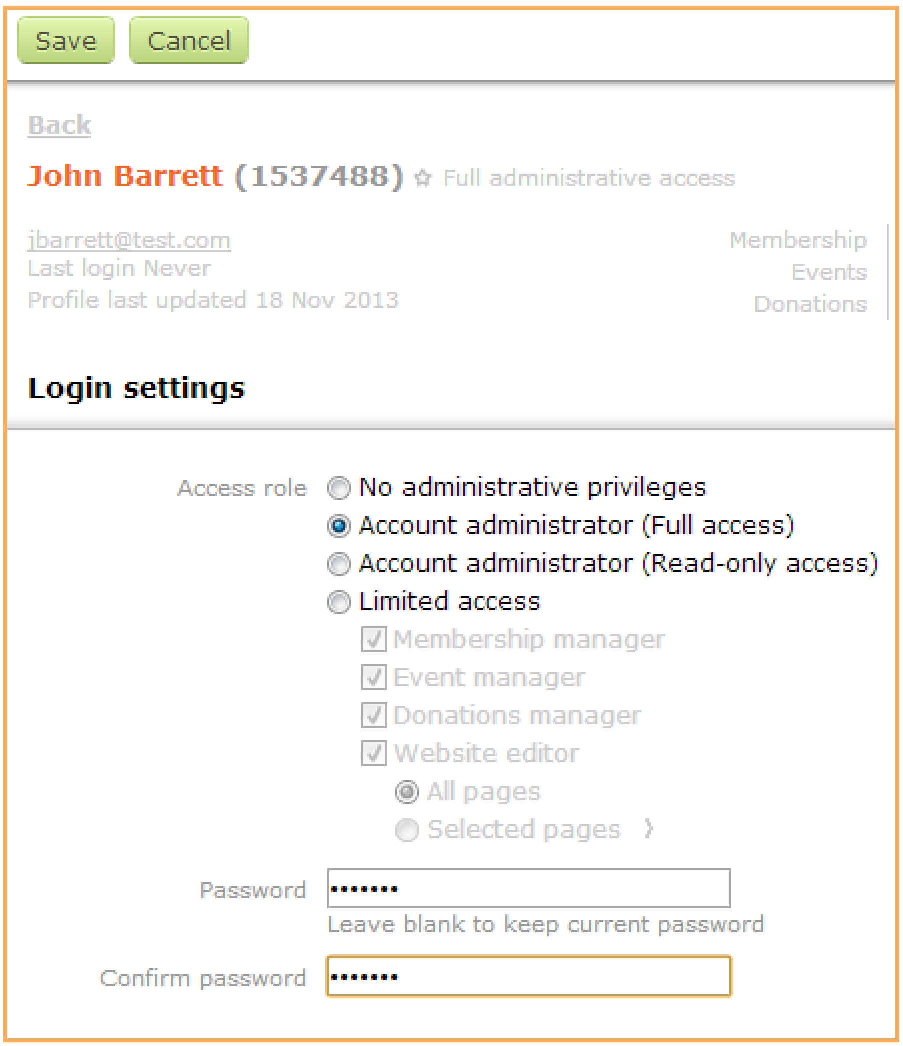
Changing the password from the contact record

Read more/less

To change a contact's password from their contact record, go to the **Contact details** tab and click the **Edit** button to the right of **Login details**.



On the screen that appears, enter the new password in the two password fields then click **Save**.

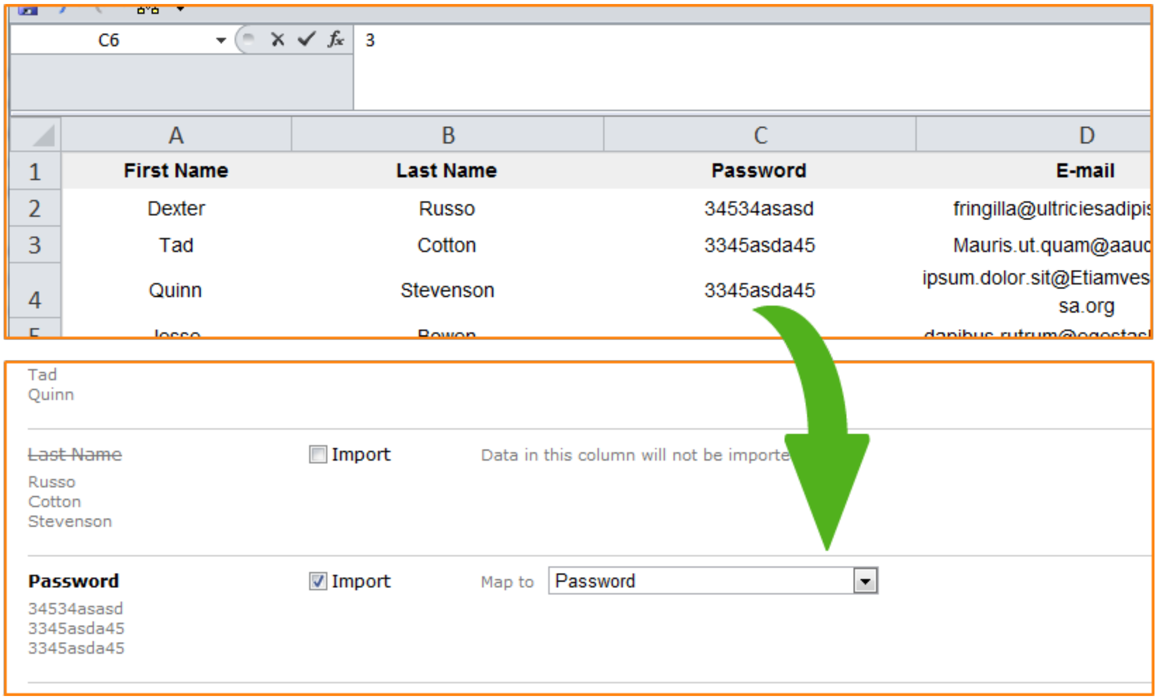


For security reasons, the contact's existing password is not visible to administrators, though administrators can reset the password for any contact.

Changing passwords through import

Read more/less

If you are transitioning from another membership management system, your members may already have passwords. In this case, you can import their passwords – along with other contact information – by entering them in the **Password** column of your spreadsheet. For more information, see Bulk changes using import and export.



If you import contacts without setting their passwords, the system will set them automatically. Your contacts can then change their generated passwords by clicking the **Forgot password** link that appears beside the **Login** button (see above for details).

Troubleshooting

I submitted a password reset request but I did not receive any email

If you don't receive the password reset email, you should check the following:

- Your email spam folder - make sure to white list this email so that future emails will go to your inbox
- If you have set up Wild Apricot to use your own custom domain name (see Custom domain setup), you have to make sure that it is set up with the correct SPF record and SPF settings

When I click on the reset link, I get a "404 - Page not found" error

This problem is related to incorrect custom domain set up. Make sure that it is set up as described on our Custom domain setup help page.

When I click on the reset link, a message says that it is expired

For security reasons, the password reset link is only valid for 24 hours. After this you will need to use the **Forgot password** link again.

On this page:

Expand all sections

Navigating Wild Apricot

Navigating Wild Apricot

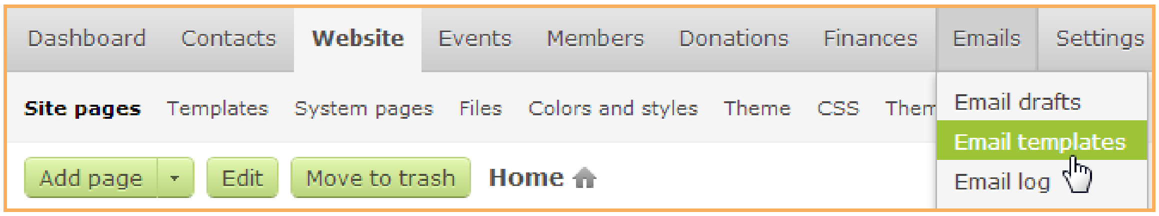
Admin screens in Wild Apricot share certain elements. You can use these elements to jump to another admin screen, to obtain help and technical support, and to view item lists and item settings.

Using the admin view menu

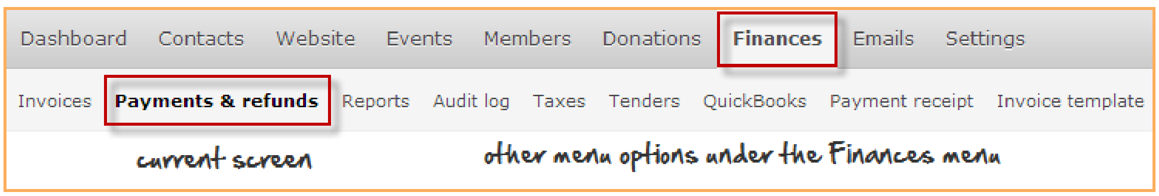
Wild Apricot admin screens are grouped into pull-down menus according to their functional area.

Read more/less

You can jump to another admin screen by selecting the appropriate option from the menu.



The menu option for the current screen will appear bolded, and the name of the menu under which it is grouped will appear bolded and highlighted. Other menu options grouped under the menu will appear horizontally across the menu bar.

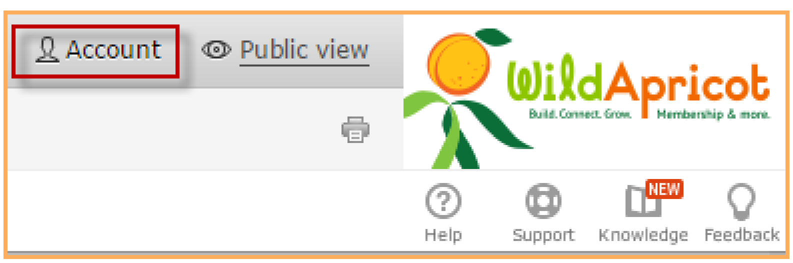


When you are editing a site page, the menu will disappear to free up more design space. Once you save or cancel your changes, the menu will reappear.

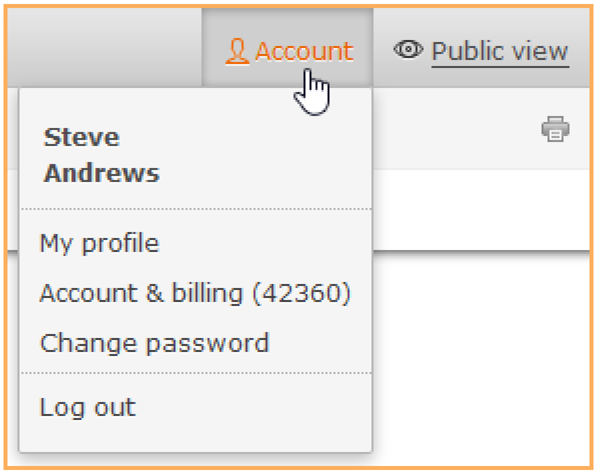
Using the Account menu

The Account menu appears to the left of the Wild Apricot logo in the upper right corner of admin view.

Read more/less



When you hover your pointer over the Account menu, a number of account-related options appear.



Selecting the **My profile** option will take you to your contact profile. For more information, see Viewing and editing contact details.

The **Account & billing** option will display your account number and can be used to take you to the Account screen where you can change your billing plan and billing details, or delete your account. For more information, see Account administration. You will need your account number if you contact Wild Apricot for technical support.

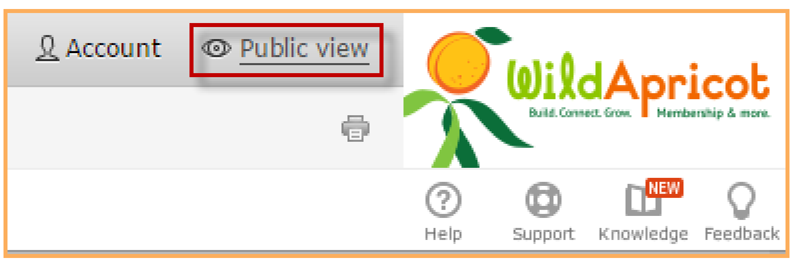
Selecting the **Change password** option will take you to a screen where you can change your password. For more information, see Setting and changing passwords.

Selecting the **Log out** option will log you out of your Wild Apricot account. Your Wild Apricot site will appear as it would to any visitor who is not logged in.

Using the Public view link

The **Public view** link appears beside the Account menu in the upper right corner of admin view.

Read more/less



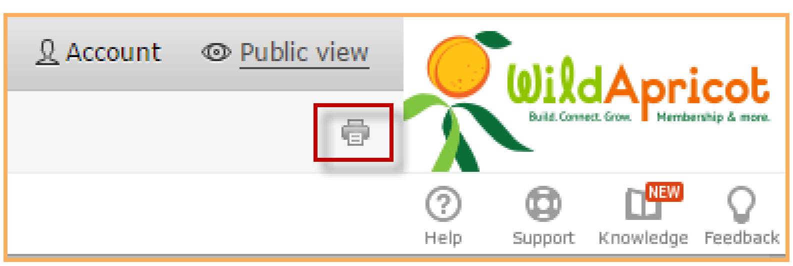
Clicking the **Public view** link takes you from admin view to public view, where you can view your Wild Apricot site as a member at your membership level would see it – assuming you have assigned yourself to a membership level. To view your site from the perspective of a visitor who is not logged in as a member, simply log out of your account from either admin view or public view.

For more information, see Switching between admin and public views.

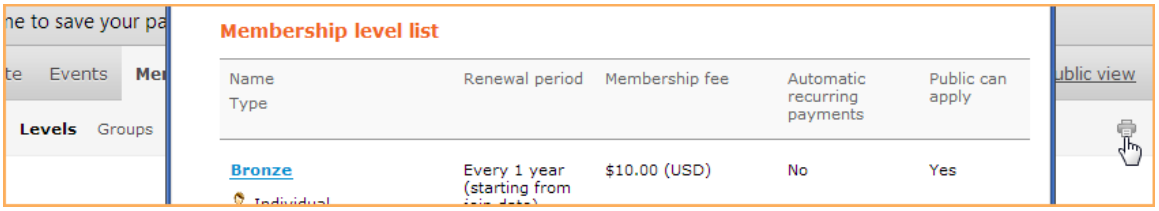
Using the Print icon

The Print icon appears below the **Public view** link in the upper right corner of admin view.

Read more/less



Using the Print icon, you can print printer-friendly versions of your Wild Apricot setup screens.



You can also print:

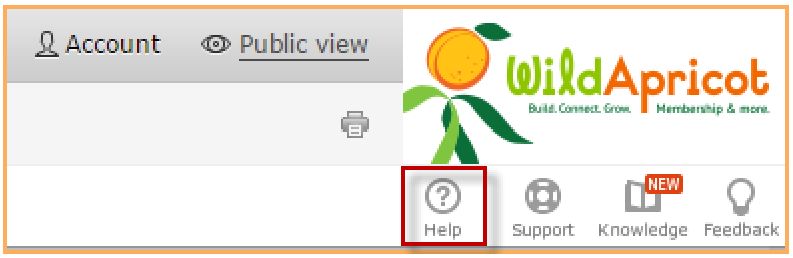
- individual invoices, payments, refunds, and donations
- lists of contacts, members, events, invoices, and payments
- various reports

For more information, see Printing in Wild Apricot.

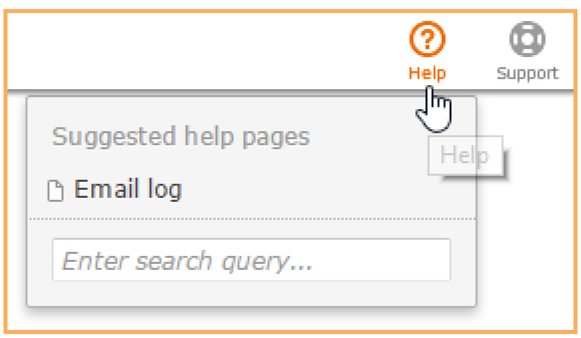
Using the Help icon

The Help icon appears below the Wild Apricot logo in the upper right corner of admin view.

Read more/less

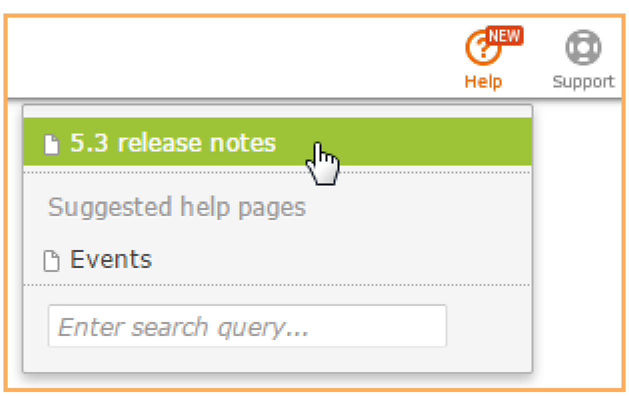


When you hover your pointer over the help icon, a link to the help topic for the screen you're currently on will appear. You can click on the topic link or search the entire help system by entering keywords in the search field.



Clicking on the Help icon itself will take you to the help system's home page.

If there are important help topics that have been recently added, a **New** flag will appear within the help icon. When you hover over the **He lp** icon while the **New** flag is being displayed, the important new topic will appear above the topics specific to the current screen.



Using the Support icon

The ability to submit support requests from within Wild Apricot has been temporarily suspended while we transition to a new and improved customer support system so we can better serve you. We apologize for any inconvenience. For assistance with your Wild Apricot account, you can email Wild Apricot support at support@wildapricot.com. or call (877) 493-6090 (toll-free in North America). For account billing issues, please send an email to billing@wildapricot.com. If you want to speak to a salesperson, send an email to sales@wildapricot.com.

Using the Academy icon

The **Academy** icon appears beside the Support icon in the upper right corner of admin view.

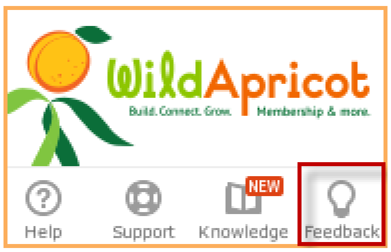
Read more/less

Clicking the **Academy** icon will take you to Wild Apricot's Membership Academy, where you can find information and resources for small organizations like yours.

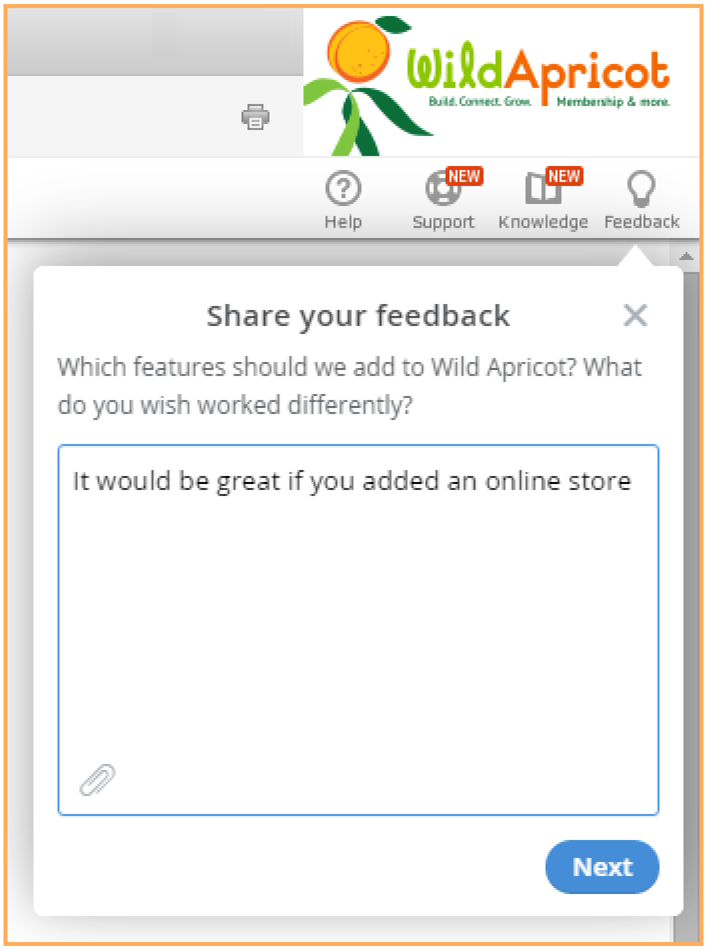
Using the Feedback icon

The **Feedback** icon appears beside the **Academy** icon in the upper right corner of admin view.

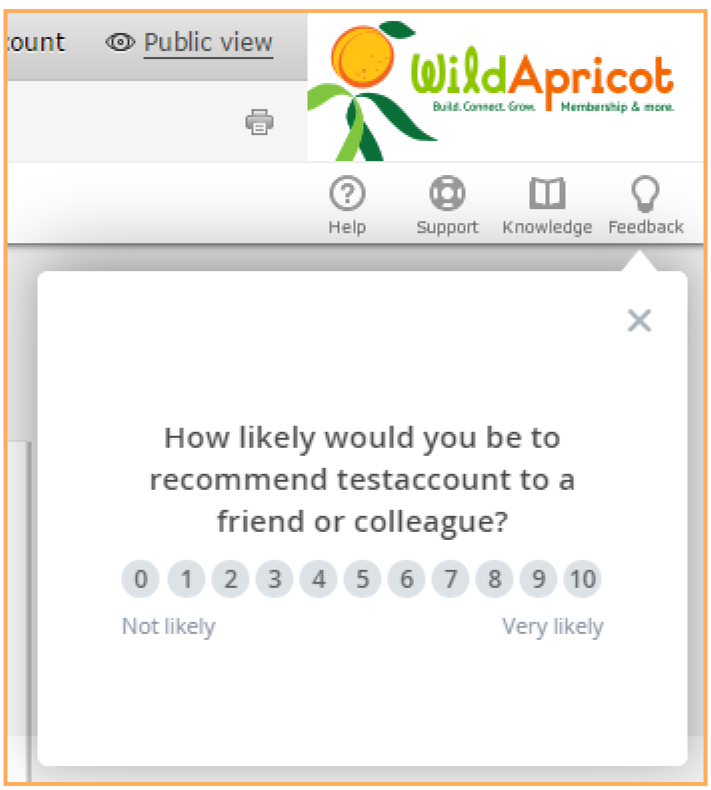
Read more/less



Clicking the **Feedback** icon will display a window where you can enter a comment or suggestion for improving Wild Apricot. Your feedback will be posted to the Wild Apricot wishlist forum where it will be reviewed by Wild Apricot's design team.



Once a month, you'll be prompted to rate your Wild Apricot experience on a scale from 1 to 10.



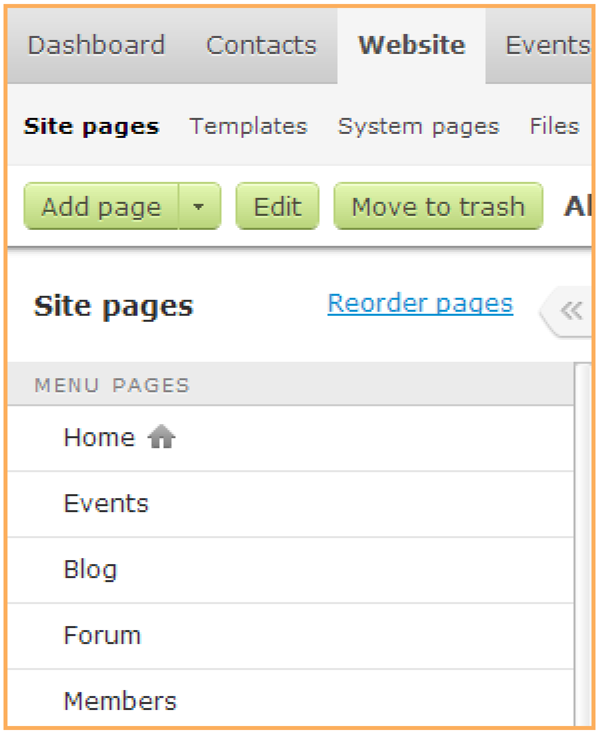
For more information, see Suggesting new features.

Using the sidebar

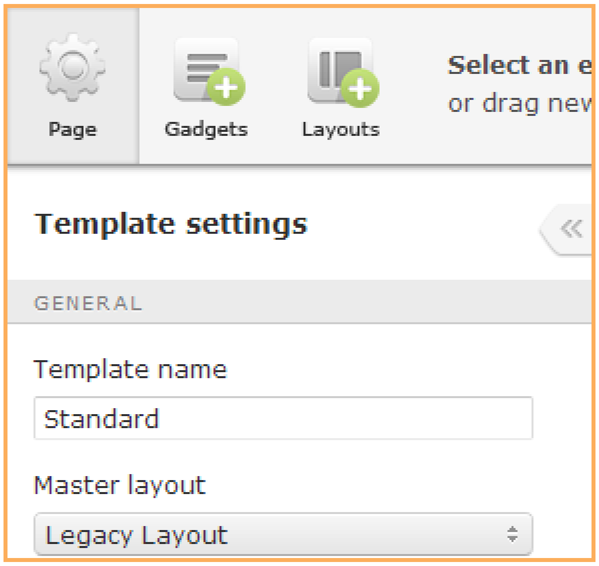
While you are managing or designing site pages, a sidebar on the left side of the screen is used to display the following:

Read more/less

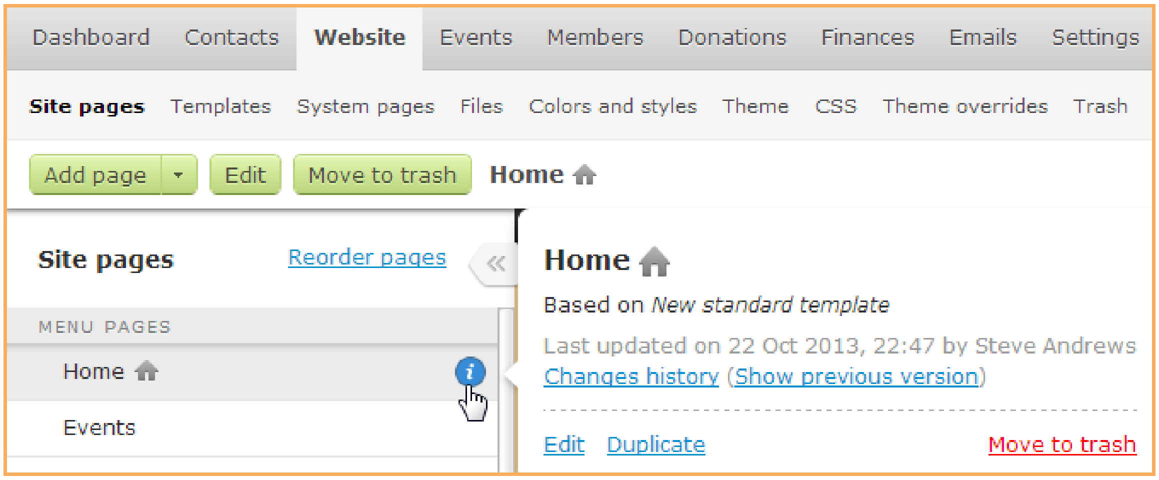
- list of items (e.g. pages, templates, gadgets, etc.)



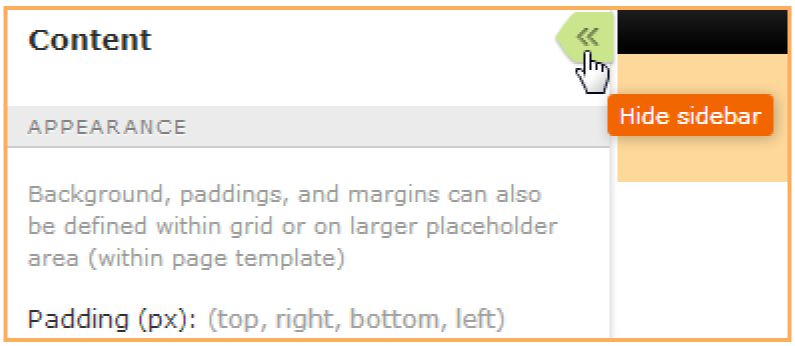
- settings for the currently selected item



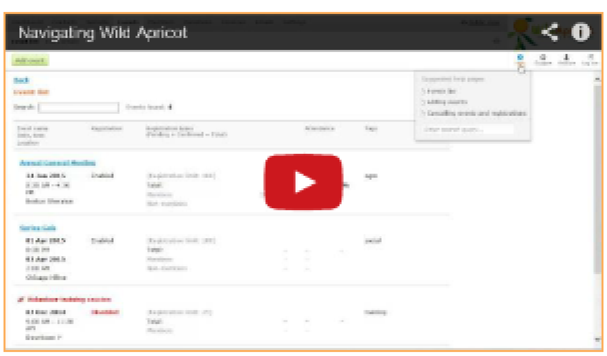
Within the item lists, an info icon will appear for the currently selected item, and for any item that you hover over. If you then hover over the info icon, an information panel displaying options specific to the item will appear.



To hide the sidebar, click the left chevron at the top of the sidebar.



To show the hidden sidebar, click the right chevron.



Video: Navigating Wild Apricot (4:31)

On this page:

- Using the admin view menu
- Using the Account menu
- Using the Public view link
- Using the Print icon
- Using the Help icon
- Using the Support icon

- Using the Academy icon
- Using the Feedback icon
- Using the sidebar

Expand all sections

Switching between admin and public views

Switching between admin and public views

When you're logged in as an administrator on your Wild Apricot site, you may want to see what a certain page looks like from the perspective of a member. To do this, you can switch between administrative view and public view.

You may also want to view the site from the perspective of a visitor who is not a member or contact.

Switching to public view

To switch from administrative view to public view, click the **Public view** link in the upper right corner of your Wild Apricot screen.

Read more/less

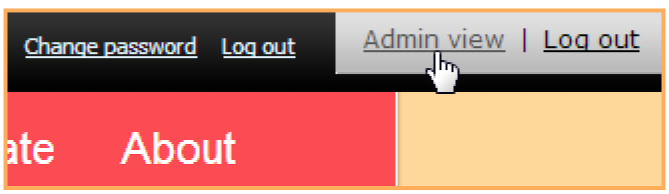
The pages, fields, members, links, events, and blogs that are visible to you will depend on the membership level of your administrative account.

Administrators can be members but don't have to be.

Switching to administrative view

To switch from public view to administrative view, click the **Admin view** link.

Read more/less



This option will only appear if you are logged in with an administrative account. For more information on administrative accounts, see Managing site administrators.

You will be returned to the last page you were on before you switched to public view.

Switching to non-member view

To view your site from the perspective of a visitor who is not logged in as a member or contact, simply log out of your account from either admin view or public view.

Read more/less

To log out, click the **Log out** link or icon. In admin view, the **Log out** icon appears in the upper right corner of the screen.

Where the **Log out** link appears in public view depends on the layout of your site.

Once you log out, you will see your site as a non-member does. Member-only pages will not appear.

Displaying admin view and public view simultaneously

You can simultaneously display your site in both admin view and public view in separate browser windows by opening one of the windows in Incognito mode (Google Chrome), InPrivate Browsing mode (Internet Explorer), or Private Browsing mode (Safari).

> Firefox cannot currently display both regular and private browsing windows at the same time.

Member view limitations

While logged in as a member in public view, you cannot preview Wild Apricot widgets embedded on other sites.

On this page:

- Switching to public view
- Switching to administrative view
- Switching to non-member view
- Displaying admin view and public view simultaneously
- Member view limitations

Expand all sections

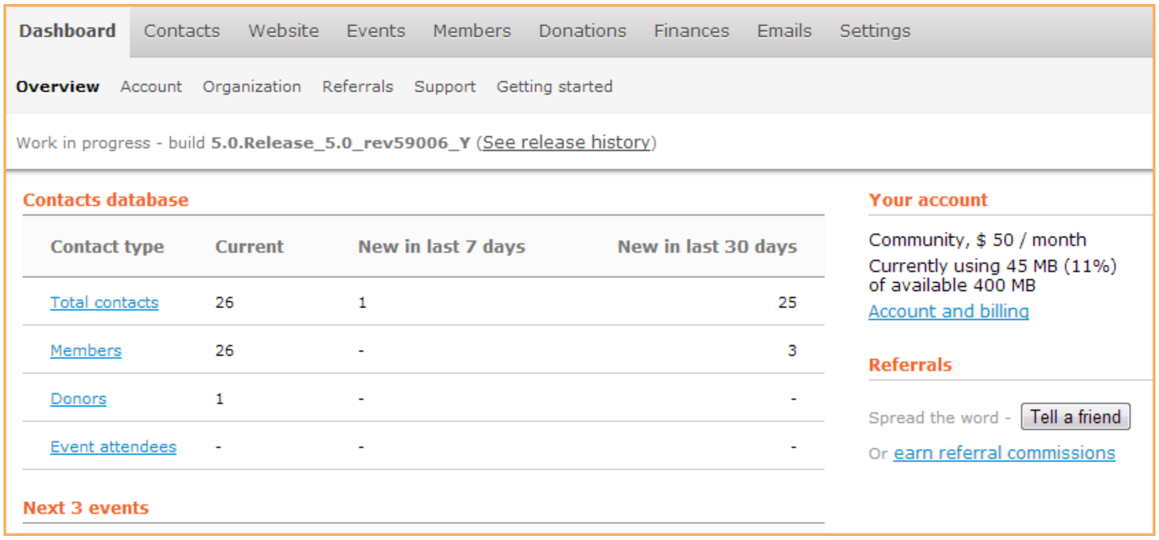
See also:

- Managing site administrators
- Membership levels

Using the Dashboard

Using the Dashboard

The Dashboard provides a quick snapshot of your entire account, showing your billing plan and displaying a summary of your contacts, upcoming events, recent donations, most active members, and least updated pages.



The Dashboard consists of the following sections.

Contacts database statistics

The **Contacts database** section displays totals for different kinds of contacts.

Read more/less

Contacts database

Contact type	Current	New in last 7 days	New in last 30 days
Total Contacts	376	5	16
Members	336	5	15
Donors	4	-	-
Event attendees	72	-	-

For each contact type, the number of new contacts in the last 7 and last 30 days are displayed.

Event statistics

The **Events** section lists the next 3 upcoming events.

Read more/less

For each event, it displays the number of confirmed and pending (registered but not confirmed paid) attendees.

Next 3 events

Date	Title	Confirmed	Pending	Total
05 Feb 2014	Spring Gala	1	-	1
30 Mar 2014	Annual General Meeting	44	2	46

You can click on an event name to view its event details.

Donation statistics

The **Donations** section lists the last 5 donations.

Read more/less

Last 5 donations

Date	Name	Amount
10 Dec 2012	Steve Andrews	$50.00 (USD)
27 Nov 2012	John Mellor	$300.00 (USD)

You can click on a donor's name to view the donation details.

Your account

This section provides a summary of your Wild Apricot account plan.

Read more/less

It also shows you how much of your file storage space is being used.

Your account

Community, $ 50 / month

Currently using 31 MB (7%)
of available 400 MB

Account and Billing

Click the **Account and billing** link for more detailed information.

Member login activity and page updates

This section lists the most active non-administrative members, based on the number of logins.

Read more/less

Administrators are not included in this number even if they log in as members. Also listed are the 5 least updated pages in your site.

Most active members

Member	Number of logins
Barrett, John	24
Caslon, William	14
Maye, Garvin	8

Longest time since last update

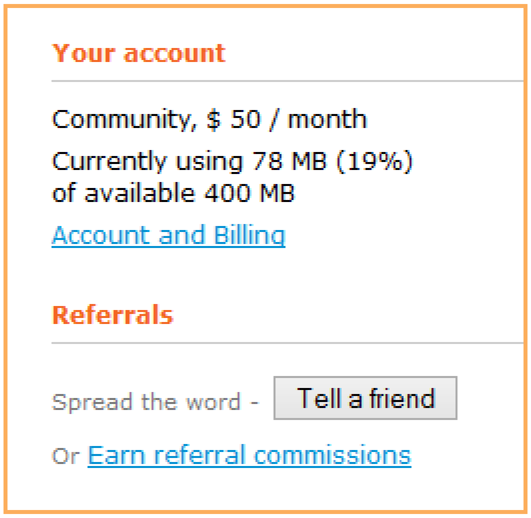
Page title	Last updated
Contact	11 Feb 2013
About	26 Sep 2013
Home	30 Sep 2013

Referrals

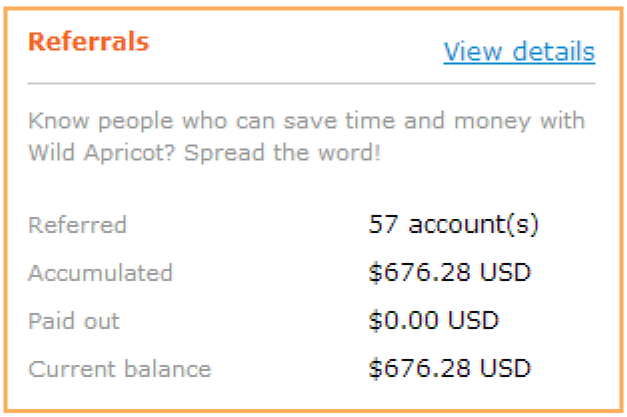
You can earn commissions by referring new users to Wild Apricot.

Read more/less

To send a referral without earning a commission, click the **Tell a friend** button. If you want to earn referral commissions, click the **Earn referral commissions** link and send referrals from the Referrals screen.



Once one of your referrals signs up for a Wild Apricot account, the **Referrals** section of your dashboard will display a summary of your referrals, including the number of referrals, how much you have accumulated in commissions, how much had been paid out to you, and how much remains in your balance.



To view more information about your referrals, click the **View details** link within the **Referrals** section of your dashboard. You will be taken to the Referrals screen.

For more information, see Referrals.

On this page:

- Contacts database statistics
- Event statistics
- Donation statistics
- Your account
- Member login activity and page updates
- Referrals

Expand all sections

Settings

Settings

From the **All settings** page, an administrator can access global settings for your website. To view the **All settings** screen, click the **Settings** menu then click the **All** option.

Other settings are also available for individual page templates, pages, layouts, and gadgets.

Which options you see on this screen will depend on your administrative permissions. The following options are available.

Your account

Update your account and organization information.
Read more/less

Option	Description	For more info see:
Account	Change your account or billing details	Upgrading to paid plan, Changing billing details
Organization	Change your organization name, time zone, and email	Organization details
Referrals	View details about your referrals and referral commissions	Referrals
Support	View and submit support requests	Working with support requests

Widgets

Add interactive functionality powered by Wild Apricot to your existing website.
Read more/less

Option	Description	For more info see:
Widgets code	Get the code to add Wild Apricot widgets to your existing website	Widgets - integrating Wild Apricot into another website

Finances

Settings related to the setup, management, and export of your finances.
Read more/less

Option	Description	For more info see:
Payment settings	Change payment settings	Online payments
Invoice template	Customize the invoice template and set the next invoice number	Customizing invoices and receipts
Payment receipt	Change payment receipt settings	Settings and customization of invoices and receipts
Tenders	Manage the list of tenders	Payment tenders
QuickBooks	Change QuickBooks export settings	QuickBooks export settings
Taxes	Set up taxes and choose where to apply them	Setting up and applying taxes

Contacts

Settings related to the management of your contact records.
Read more/less

In Wild Apricot, all records are considered contact records whether they have a membership or not (see Contact vs member records).

Option	Description	For more info see:
Common fields	Customize common contact fields	Customizing your contact database fields

Password email	Customize password email	Setting and changing passwords
Subscription form email	Customize subscription confirmation email	E-mail subscription form

Memberships

All settings related to the setup of your membership renewals, online applications forms, and membership emails (e.g. reminders).
Read more/less

Option	Description	For more info see:
Membership fields	Customize membership database fields	Customizing your member database
Levels	Manage membership levels	Membership levels
Privacy	Set default member privacy settings	Member privacy settings
Groups	Manage member groups	Member groups
Discounts	Create discount coupons	Discount coupons for membership applications
Search result layouts	Customize advanced search result layouts	Custom reports layouts
Member emails	Customize membership emails	Customizing default membership emails
Starting page	Choose landing page for members	Specifying landing pages

Events

Settings related to events.
Read more/less

Option	Description	For more info see:
Event emails	Customize event emails	Event emails

Donations

Settings related to donations.
Read more/less

Option	Description	For more info see:
Donation confirmation email	Customize donation confirmation email	Donation Confirmation Email
Donation fields	Customize donation database fields	Donation forms
Donation receipt	Change donation receipt settings	Managing donations

Site look and feel

Website layout and design options. See Customizing your site .
Read more/less

Option	Description	For more info see:
Theme	Select website theme	Website themes
Colors and styles	Change colors and styles used throughout your site	Customizing colors and styles

CSS	Add CSS code for advanced site customization	CSS customization
Theme overrides	Customize website appearance by directly modifying theme files	Theme overrides

Security

Options for securing your website.
Read more/less

Option	Description	For more info see:
Administrators	Control who can modify your site	Managing site administrators
Anti-spam settings (Captcha)	Enable Captcha anti-spam settings	Anti-spam settings (Captcha)
Authorization required message	Customize message for restricted access page	Authorization required message
Traffic encryption (HTTPS/SSL)	Provide secure access to your website using traffic encryption	Traffic encryption
API key	Generate an API key	Wild Apricot admin API

Site settings

Settings specific to the setup of your website. See Site settings .
Read more/less

Option	Description	For more info see:
Files	Upload and manage website pictures and documents	File management
Domain name	Add custom domain, change website address	Domain management
Global JavaScript	Insert custom JavaScript to run on all site pages	Inserting and modifying HTML or JavaScript
Meta-tags	Change keywords and other tags for search engine optimization	Search Engine Optimization (SEO) Tools - Page Title and Meta Tags
Routing of system emails	Choose who receives copies of system emails	Routing of system emails
Site search settings	Control whether certain kinds of content are included in site search results	Site searches

On this page:

Expand all sections

Printing in Wild Apricot

Printing in Wild Apricot

You can print pages from your Wild Apricot site in both public and admin views. In admin view, you can print setup screens as well as your actual site pages. You can also print:

- individual invoices, payments, refunds, and donations
- lists of contacts, members, events, invoices, and payments
- various reports

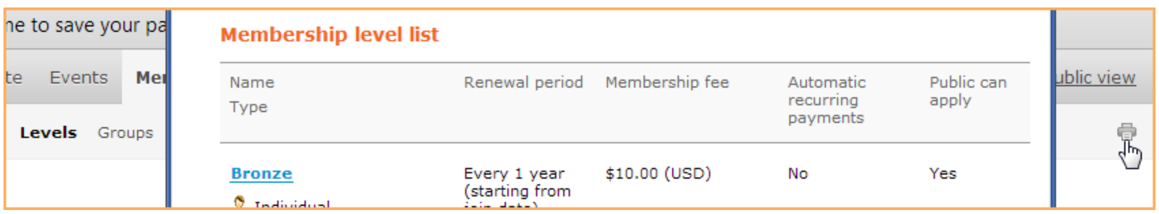
Printing site pages

You can print pages from your actual Wild Apricot site in either public view or admin view. To print a site page, use your browser's print function.

Printing admin screens

In admin view, you can print printer-friendly versions of your Wild Apricot setup screens.

Read more/less

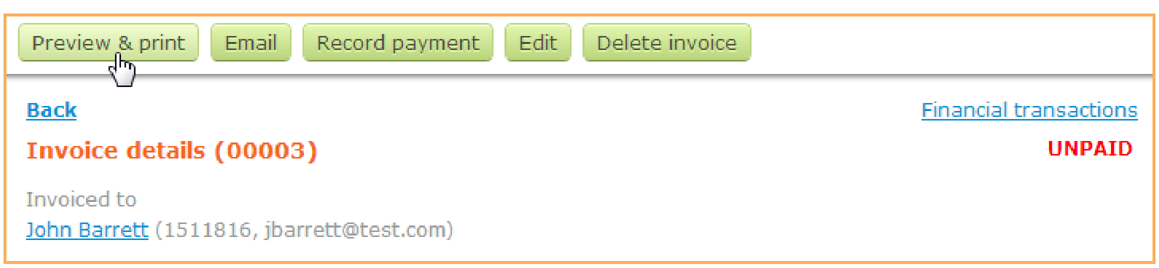


To print an admin page, click the **Print** icon. The **Print** icon appears to the left of the admin logo.

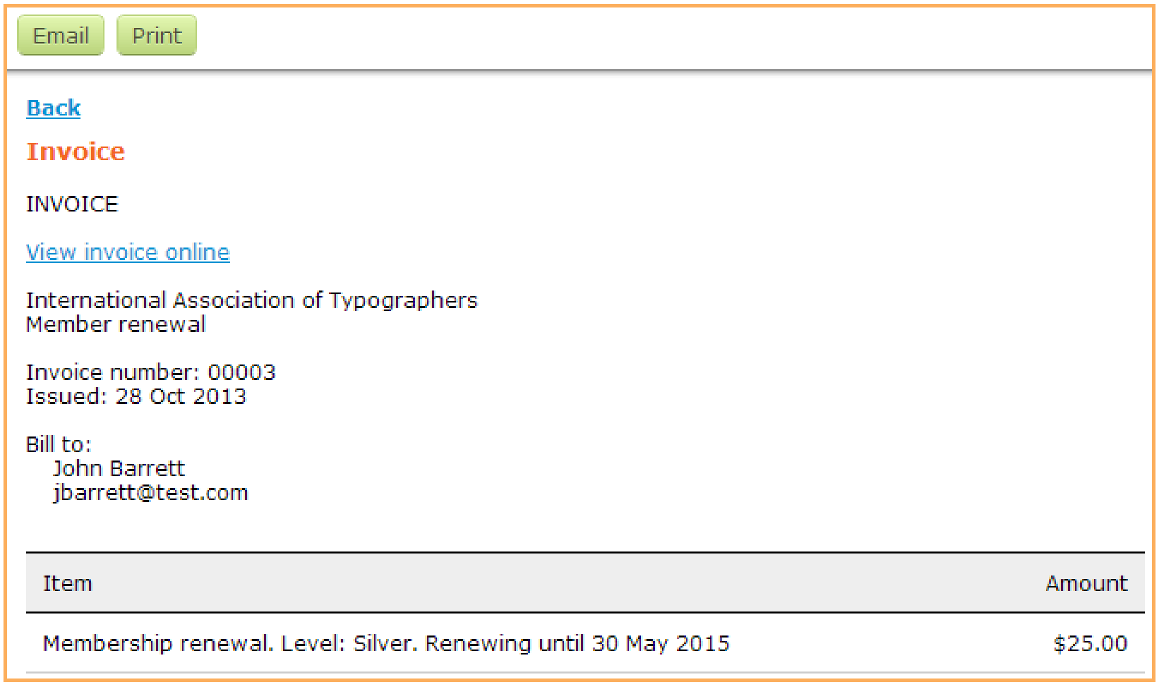
Printing individual financial records

When you are viewing the details of a single invoice, payment, refunds, or donation, you can print the detailed item by clicking the **Preview & Print** button.

Read more/less



You will then see a preview of the item you are about to print, laid out according to your template.

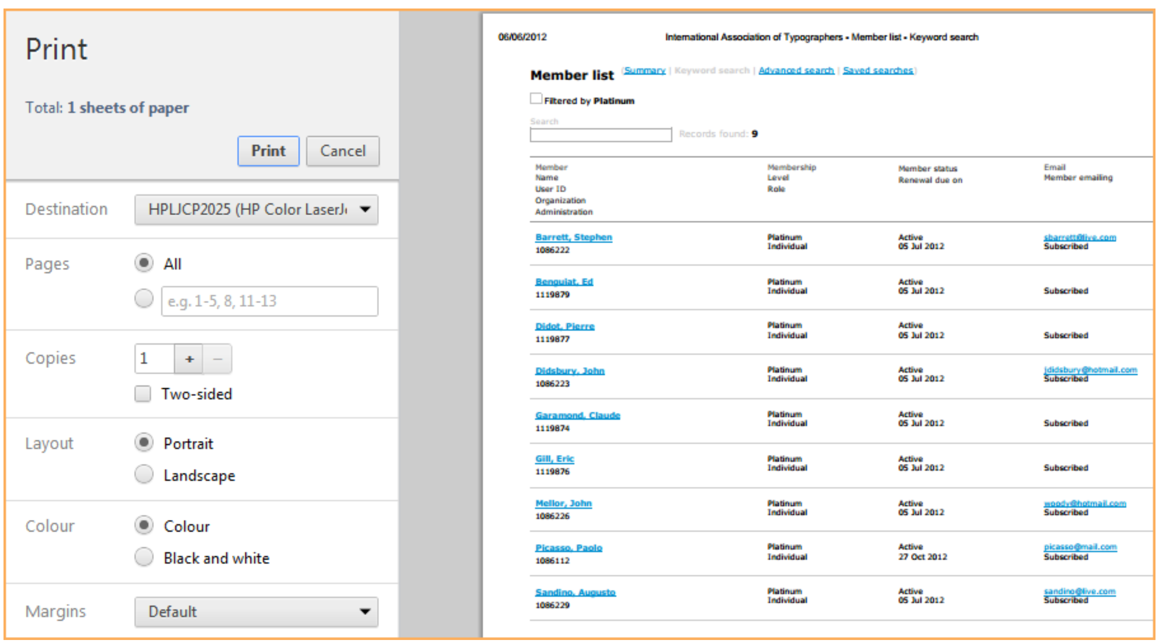


Click **Print** to print the item, or **Email** to email it instead.

Printing lists

To print a list of contacts, members, events, invoices, or payments, display the list then click the **Print** icon that appears in the upper right corner of admin view.

Read more/less

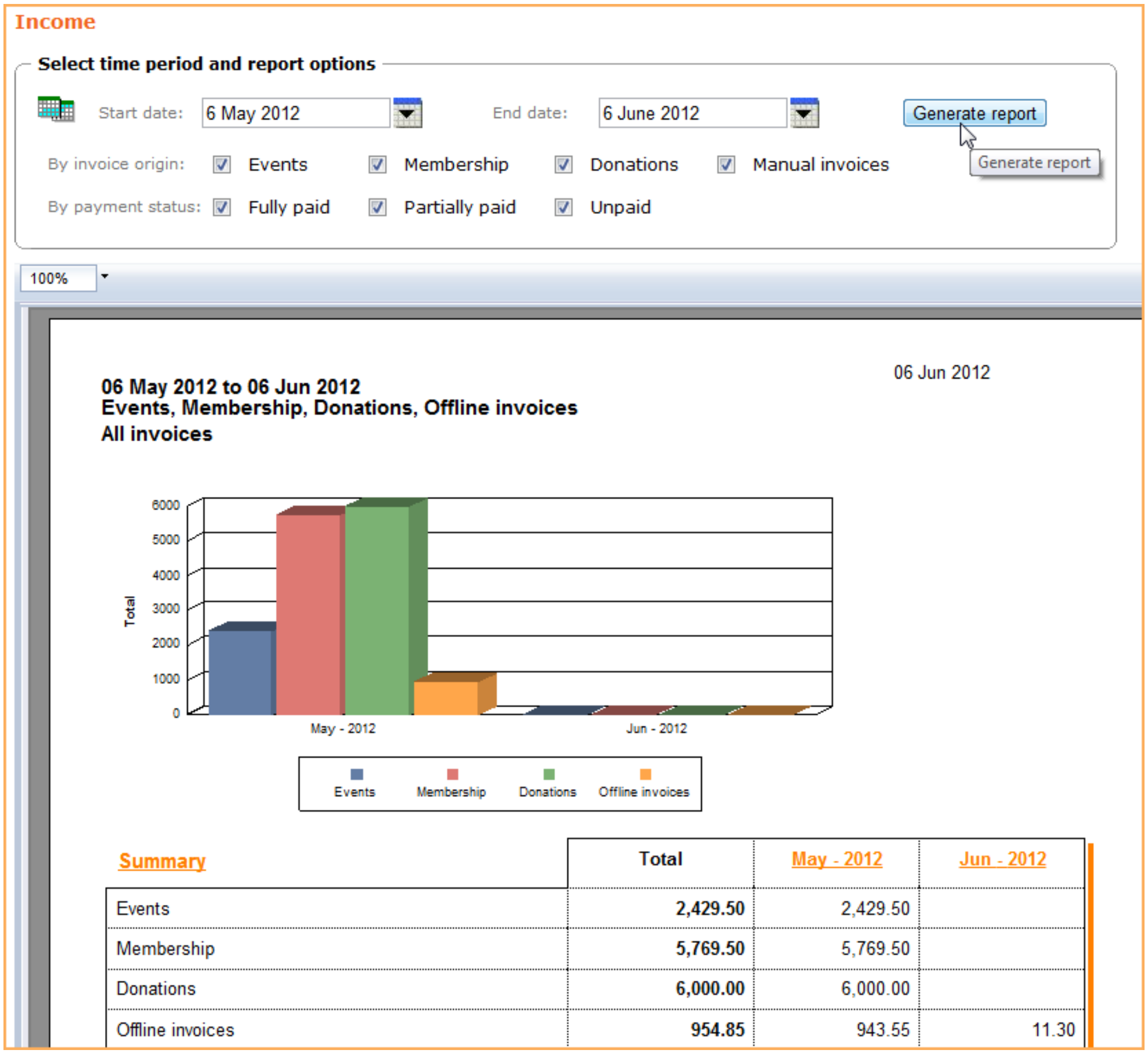


Whatever filter settings you have in effect will be reflected in the printed version. If the list spans multiple screens, only the items currently being displayed will be printed. To print the entire list, export it to Excel then print it from there.

Printing reports

A variety of reports are available in Wild Apricot. After generating the report, you can print it by clicking the **Print** icon.

Read more/less



On this page:

- Printing site pages
- Printing admin screens
- Printing individual financial records
- Printing lists
- Printing reports

Expand all sections

Working with support requests

Working with support requests

For assistance with your Wild Apricot account, you can email Wild Apricot support at support@wildapricot.com. or call (877) 493-6090 (toll-free in North America). You can also submit a support request from our support portal .

> ⚠ The ability to submit support requests from within Wild Apricot has been temporarily suspended while we transition to a new and improved customer support system so we can better serve you. We apologize for any inconvenience.

For account billing issues, please send an email to billing@wildapricot.com. If you want to speak to a salesperson, send an email to sales@wildapricot.com.

New member guide

New member guide

Welcome to the Wild Apricot family! As a member of a Wild Apricot site, you can view member-only content, sign up for events, and interact with other members through member directories, discussion forums, and blog posts. You can also perform self-service functions such as updating your profile, paying invoices, and renewing your membership. In this guide, we'll help you get started, show you how to manage your membership, and introduce you to some of the functionality that might appear on your Wild Apricot site.

> ⓘ If your Wild Apricot site was set up using a responsive website theme, you can view a mobile-friendly version from your smartphone or tablet.

Logging in

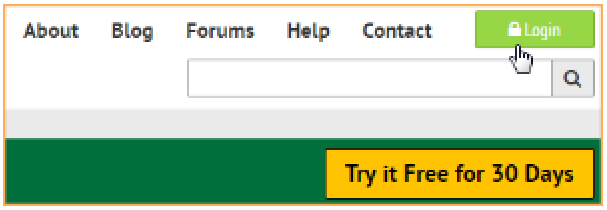
You have to log into your Wild Apricot account if you want to access member-only pages on your Wild Apricot site, or if you want to perform self-service functions such as changing your email preferences or paying an invoice.

Read more/less

> ⓘ New members are automatically logged in after supplying their email address when they apply for membership, register for an event, or make a donation.

If you don't remember your Wild Apricot website address, check your email inbox for the welcome email that was sent to you when you joined. If you cannot find the email, check your spam folder.

Another option if you don't remember your Wild Apricot address is to go to www.wildapricot.com and click the **Login** button in the upper right corner.



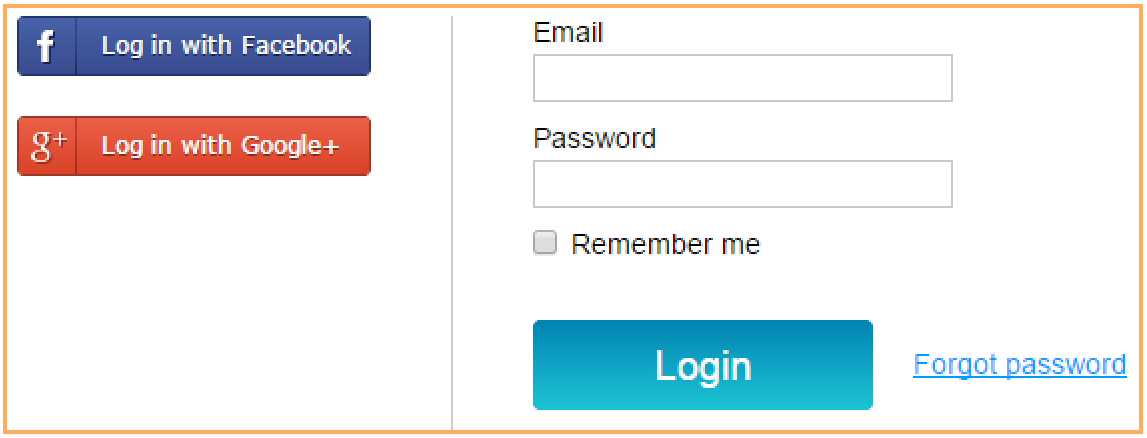
You will be asked for your email address. After you click **Send login details**, you'll receive an email with your site address.

Where you log in will depend on your website design. You might click a **Login** link that leads to a login page...

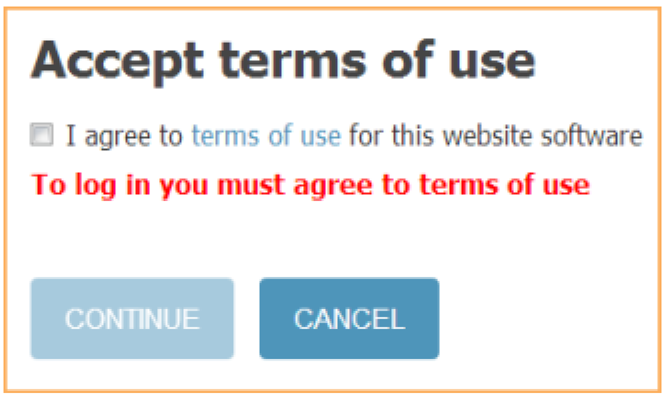
... or enter your login information directly into login boxes that appear on the home page.

In the log in fields, you enter your Wild Apricot credentials – your email and password – then click the **Login** button. If you do not remember your password, click the **Forgot password** link next to the **Login** button. On the page that appears, you can enter your email address to receive a reset password link via email.

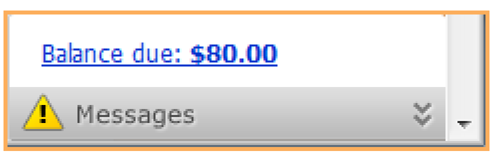
Depending on how your site was set up, you might be able to log in using your Facebook or Google+ credentials, as long as you're using the same email address for your Wild Apricot site and your Facebook or Google+ account.



When you first log into Wild Apricot, you will be required to accept Wild Apricot's terms of use before proceeding.



After you log in, a message will appear with links in the bottom right corner if you have unpaid invoices or incomplete registrations, or are lapsed, overdue, or within a week of your renewal date.



You can click any of these links to resolve the corresponding issue.

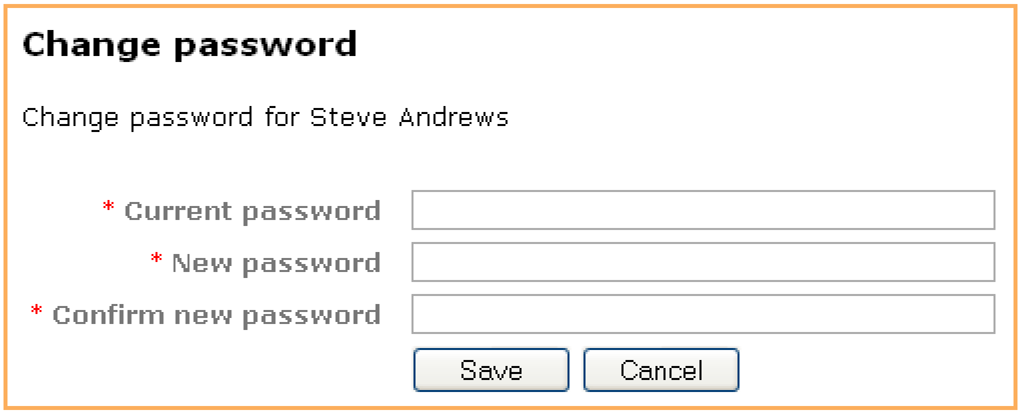
Changing your password

Passwords are automatically generated and emailed to you when join a Wild Apricot member site, register for an event, or make a donation. Passwords can also be set manually by your Wild Apricot site administrator.

Read more/less

You can change your password by clicking the **Change password** link that appears below or beside the link to your profile after you log into your Wild Apricot site.

On the screen that appears, you enter your current password, then the new password, and the new password again for confirmation.



Password requirements

- Minimum of 7 characters
- Maximum of 50 characters
- Any combination of letters, numbers and characters (except spaces)

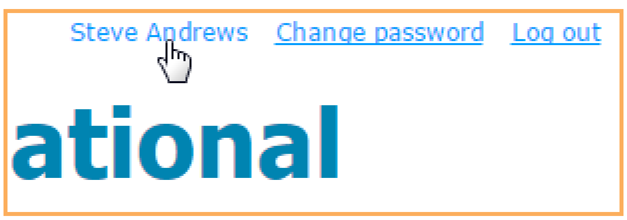
⚠ Wild Apricot passwords are case sensitive.

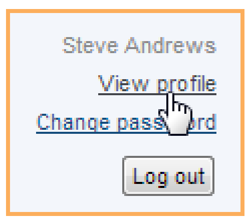
Updating your profile

Depending on how your Wild Apricot site is set up, information about you may be visible to other members or the general public on member directories, forum posts, and blog entries. You update your personal information from your member profile and control what information is visible to other members and the public.

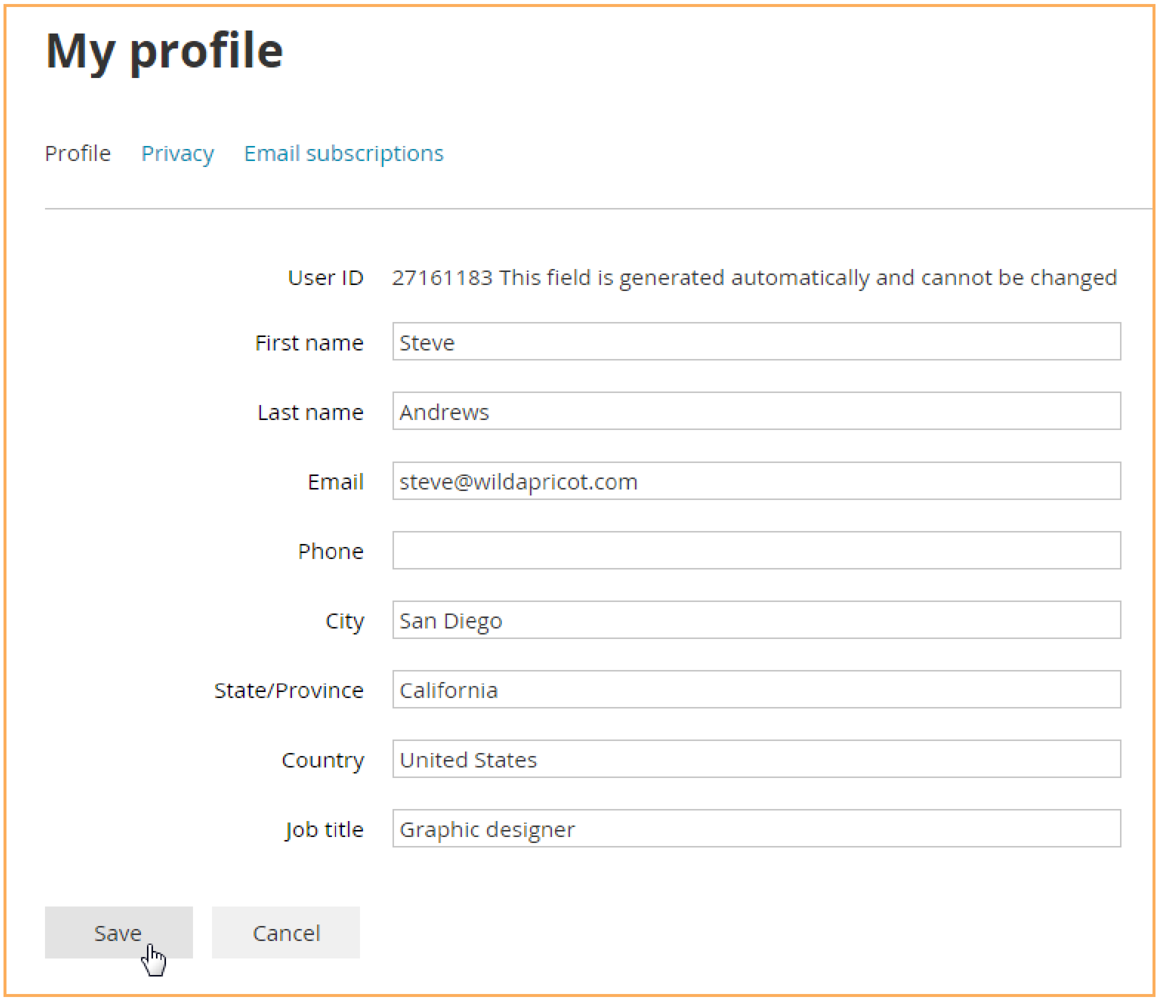
Read more/less

Once you are logged into your Wild Apricot account, a link will appear to your member profile. Depending on how your Wild Apricot site was set up, the link will appear as your name or as **View profile**.





From the **My profile** screen that appears, click the **Edit profile** button to update your personal information.



After you've made your changes, click the **Save** button to save them.

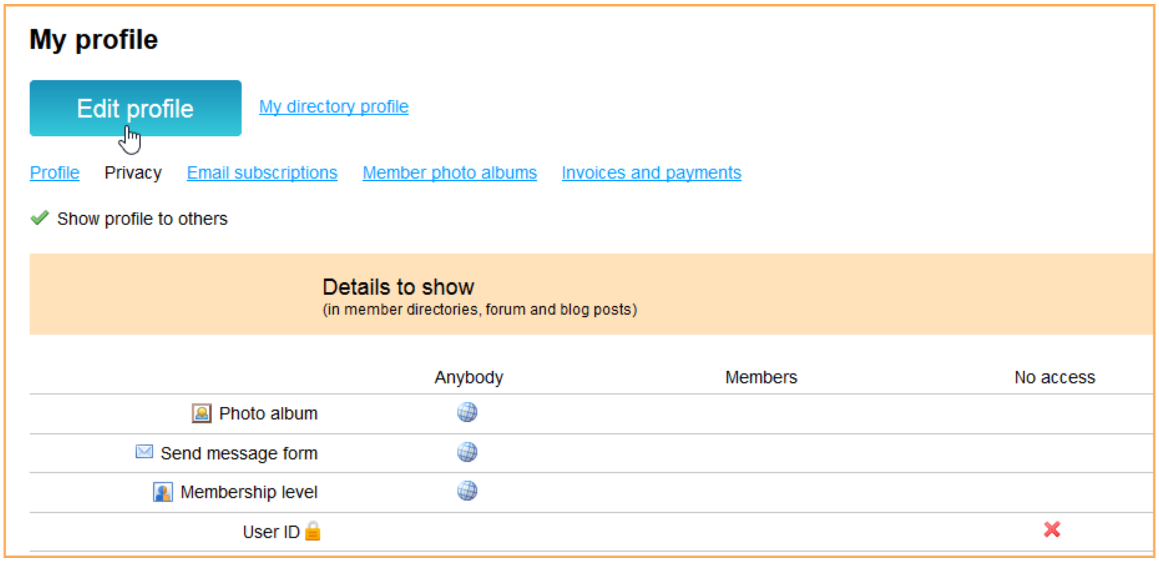
Changing your privacy settings

You can control which information from your member profile will appear to the public and other members on member directories, forum posts, and blog entries, and whether your member photo albums (if enabled) are visible to other members and non-members.

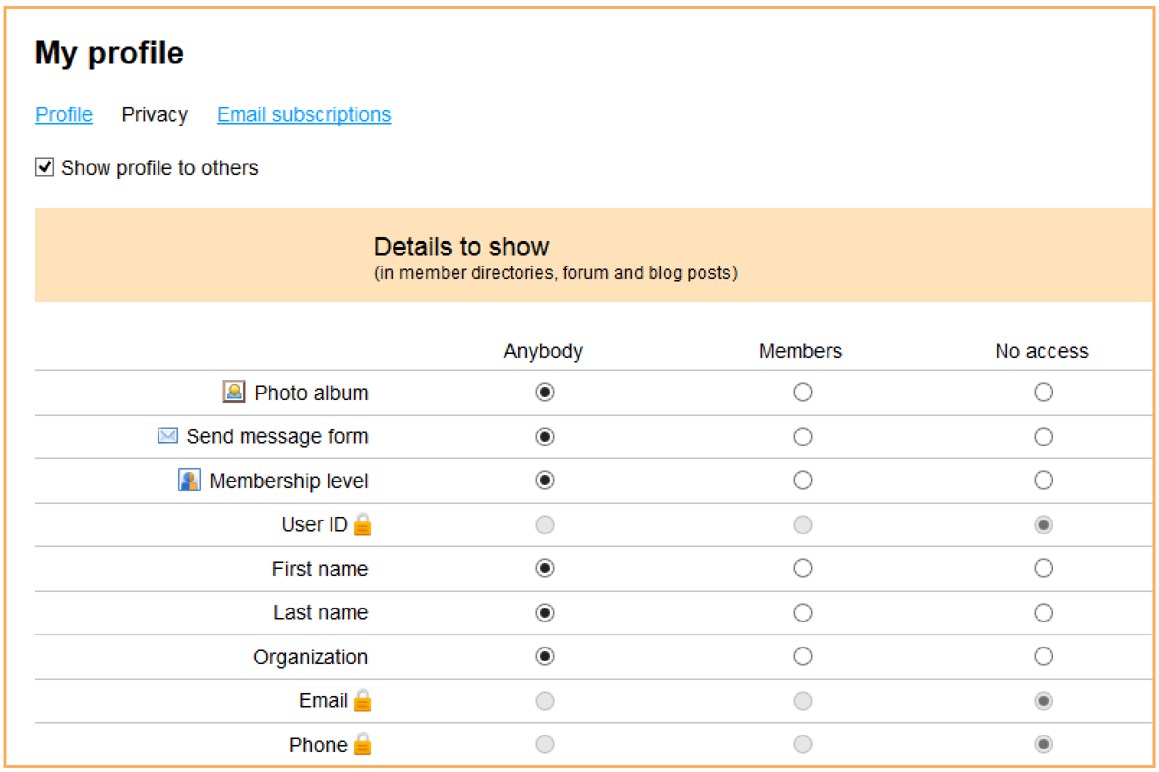
Read more/less

Your Wild Apricot site administrator can choose your initial privacy settings, and optionally, lock them so you can can't change them.

To change your initial privacy settings, click the **Privacy** tab within your member profile then click the **Edit profile** button.



To change the privacy level for an item, click the circle under the appropriate column to limit access to anybody, members only, or no one.



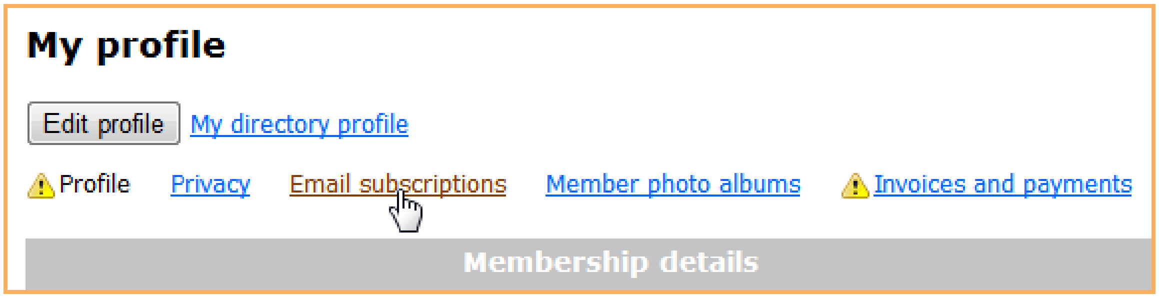
If you uncheck the **Show profile to others** option, you won't appear in any member directories.

Once you are finished changing your privacy settings, click the **Save** button.

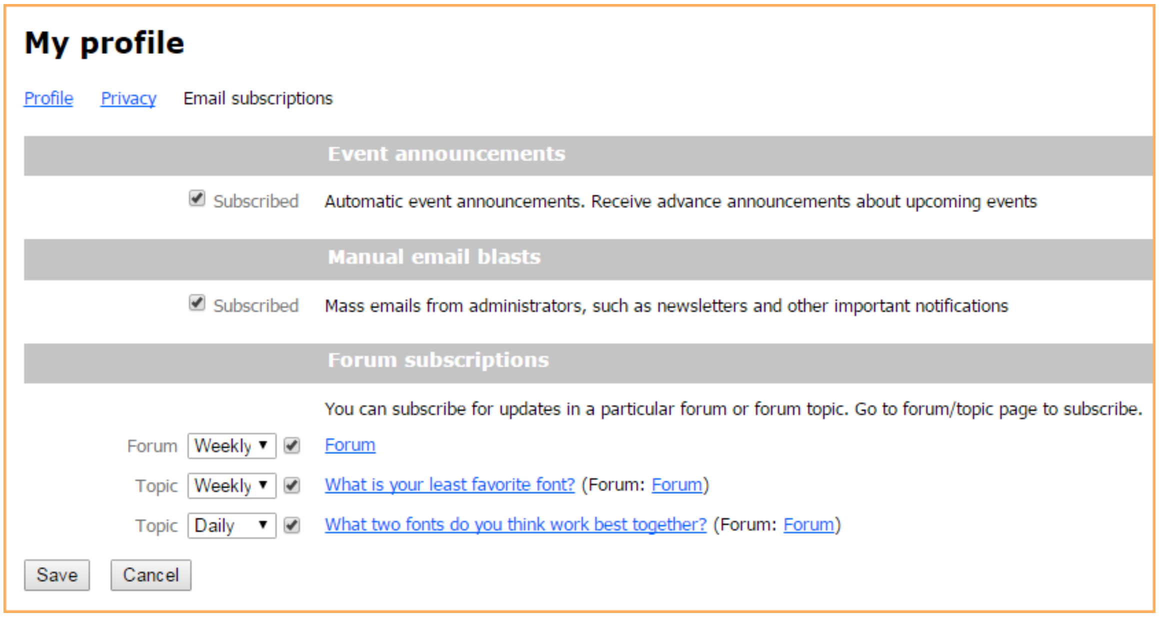
Setting your email preferences

From your member profile, you can unsubscribe from different kinds of emails. To do so, click the **Email subscriptions** tab within your member profile then click the **Edit profile** button.

Read more/less



You can now check or uncheck the kinds of emails you want to receive.



There are three types of emails you can control:

- **Event notifications** – automatic event emails such as event announcements (sent to people not yet registered) and event reminders (sent to registered attendees only)
- **Manual email blasts** – email blasts sent by site administrators
- **Forum subscriptions** – if you have already subscribed to discussion forum updates

When you first join, you will have event notifications and email blasts turned on. For forum subscriptions, you can also control how frequently you receive forum update notifications.

After you have made your choices, click **Save**.

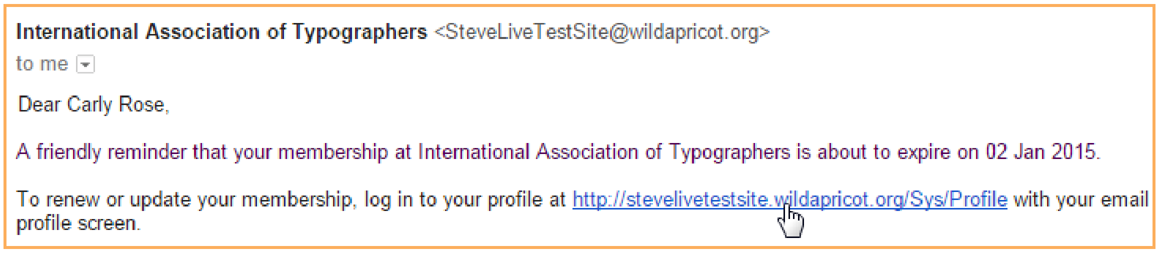
> The email settings above do not affect other automatic emails such as membership renewal reminders and invoices/receipts. Only administrators can disable those emails.

Renewing your membership

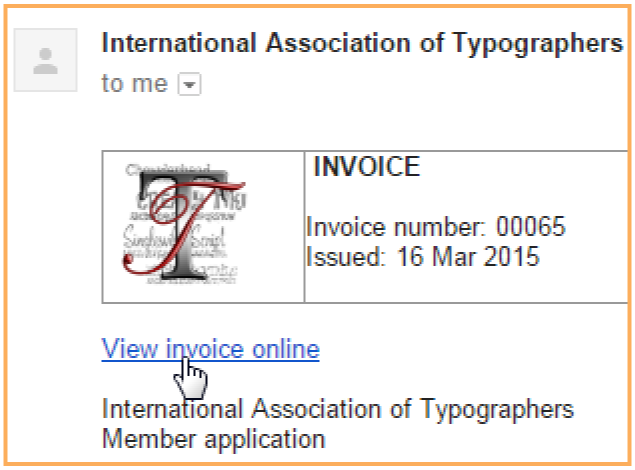
There are two ways you can renew your membership.

Read more/less

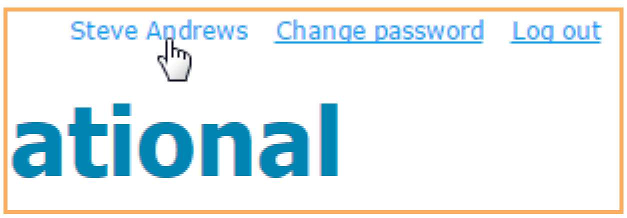
A membership renewal notice and/or invoice will be automatically emailed to you a certain number of days before your membership renewal date. Within the renewal notice, you can click the link to log into your Wild Apricot account.

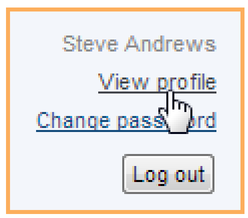


Within the invoice, you can click the **View invoice online** link to view and pay the invoice online without logging in.

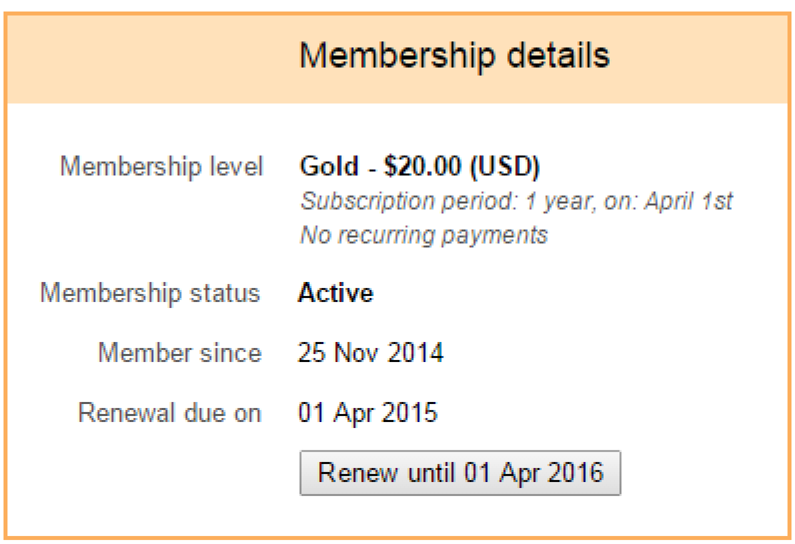


You can also renew your membership from your member profile on your Wild Apricot site. To view your member profile, log into your Wild Apricot site and click the link to your member profile. Depending on how your Wild Apricot site was set up, the link will appear as your name or as **View profile** .

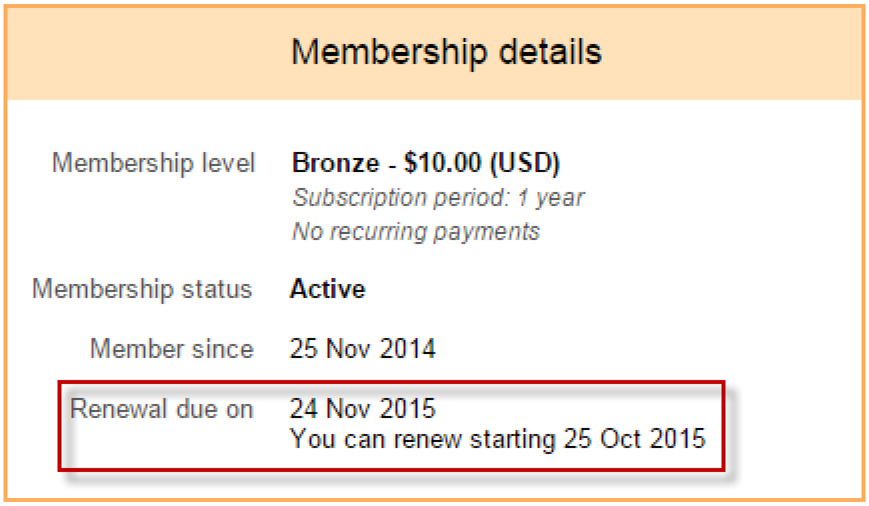




To renew your membership from your member profile, click the**Renew** button on your **Profile** page.



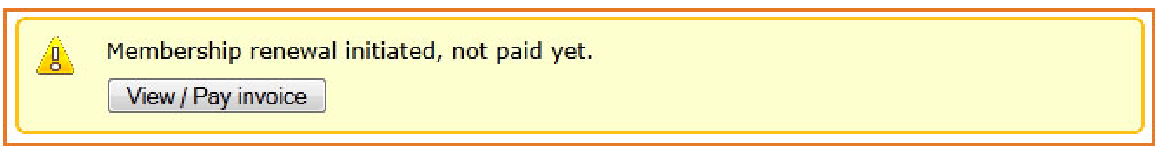
If you are limited to renewing only one period ahead or only within a certain number of days or months before the membership expires, a notice informing you of the next possible renewal date may appear in place of the **Renew** button.



After you click the **Renew** button, you can review and update your membership details, then click the **Update and next** button. Then, you click the Confirm button to confirm the renewal request. You will be taken to the **Invoices and payments** page where you can pay for the invoice for the renewal.

Until the payment is made, a *Balance due* notification will be shown on the notification bar,

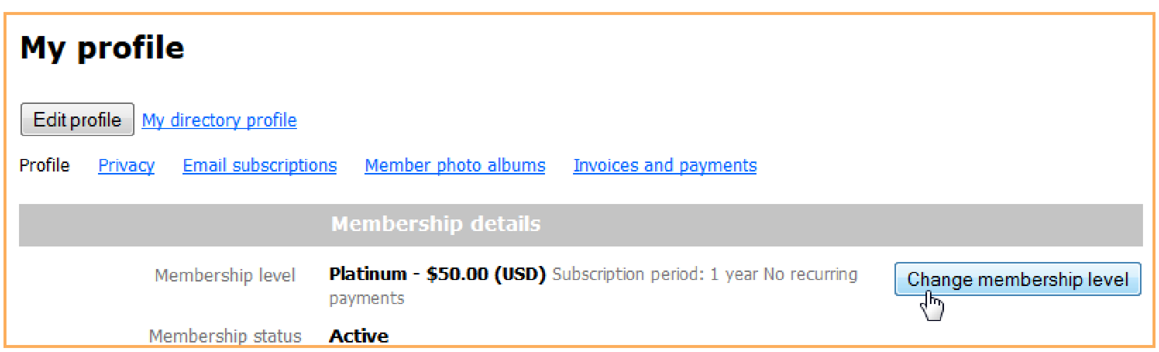
and a message will be displayed on your member profile:



Changing your membership level

If the security options for your membership level allows, you can switch to a different membership level by clicking the **Change membership** button that appears on your **Profile** screen.

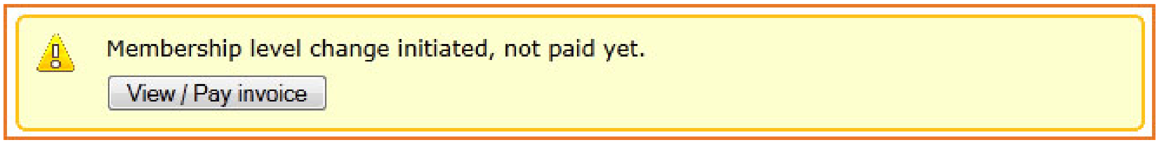
Read more/less



Once you click the **Change membership** button, you can choose a new membership level then click the **Next** button. After reviewing your choice and updating any profile details, you click the **Confirm and next** button. Finally, you click the **Confirm** button to confirm the level change request. You will be taken to the **Invoices and payments** page where you can pay the membership fee.

The full price of the new membership term will be billed, and the next renewal date will be calculated based on new level settings and payment date. There is currently no pro-rating based on the previous membership level.

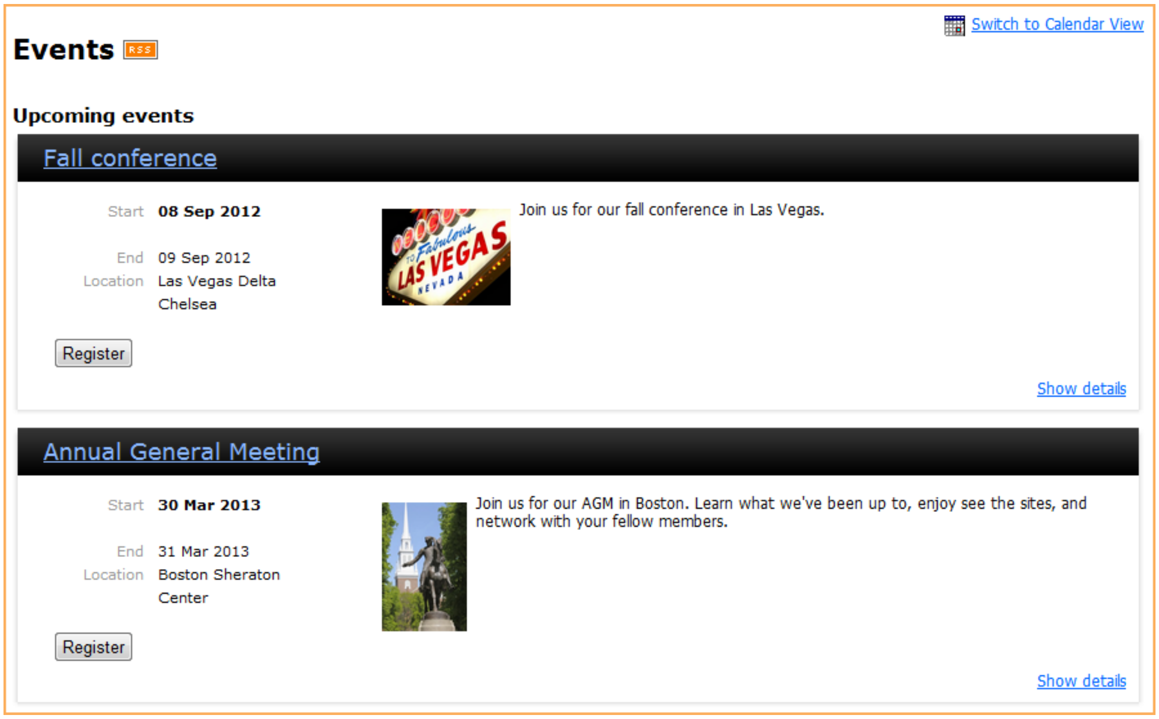
After the online payment is completed, your membership record will be updated with a new membership level and renewal date. Until the payment is received, notice about the level change is shown on the your profile, along with the option to view and pay the invoice.



Registering for events

The events that you can register to attend appear on an events calendar on an events page. Using the event calendar, you can view event details and register for events.

Read more/less

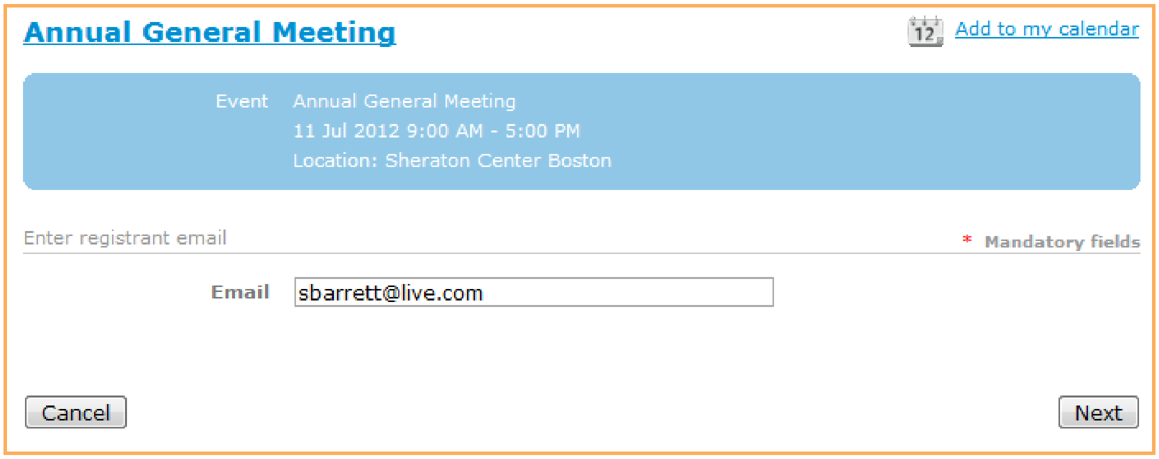


To view the details for a particular event, click the event name or the **Show details** link. To register for an event, click the **Register** button .

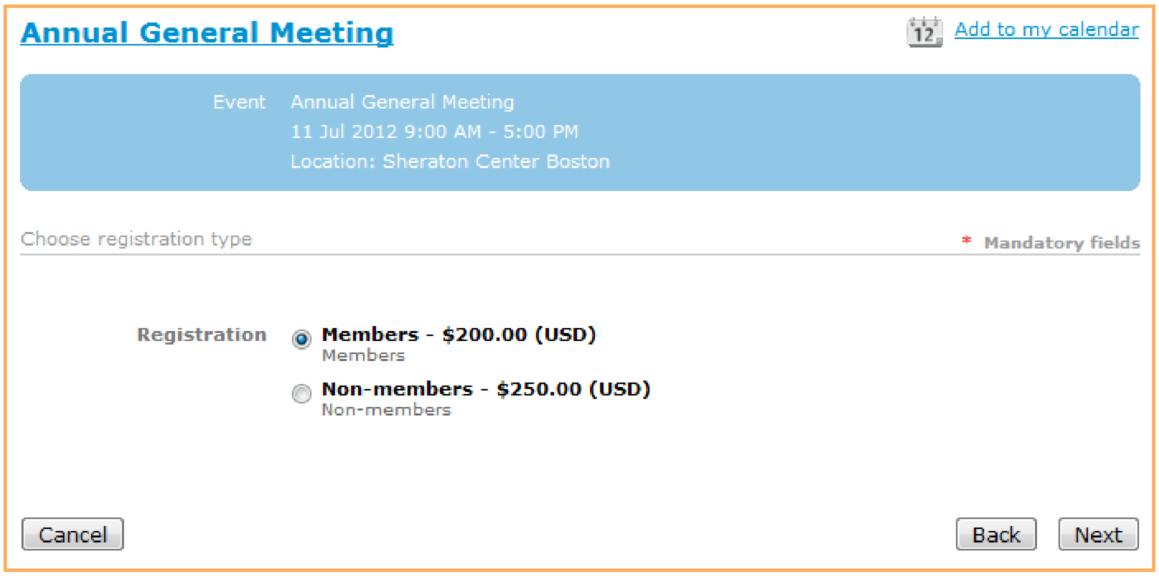
You can register multiple attendees under your account by returning to the event registration page after confirming each registration but before paying.

After you've clicked the **Register** button, follow these steps to complete your registration:

1. If you are not already logged in, enter your email address. If you are already logged in, your email will already be filled in (though you can change it, to register another person).

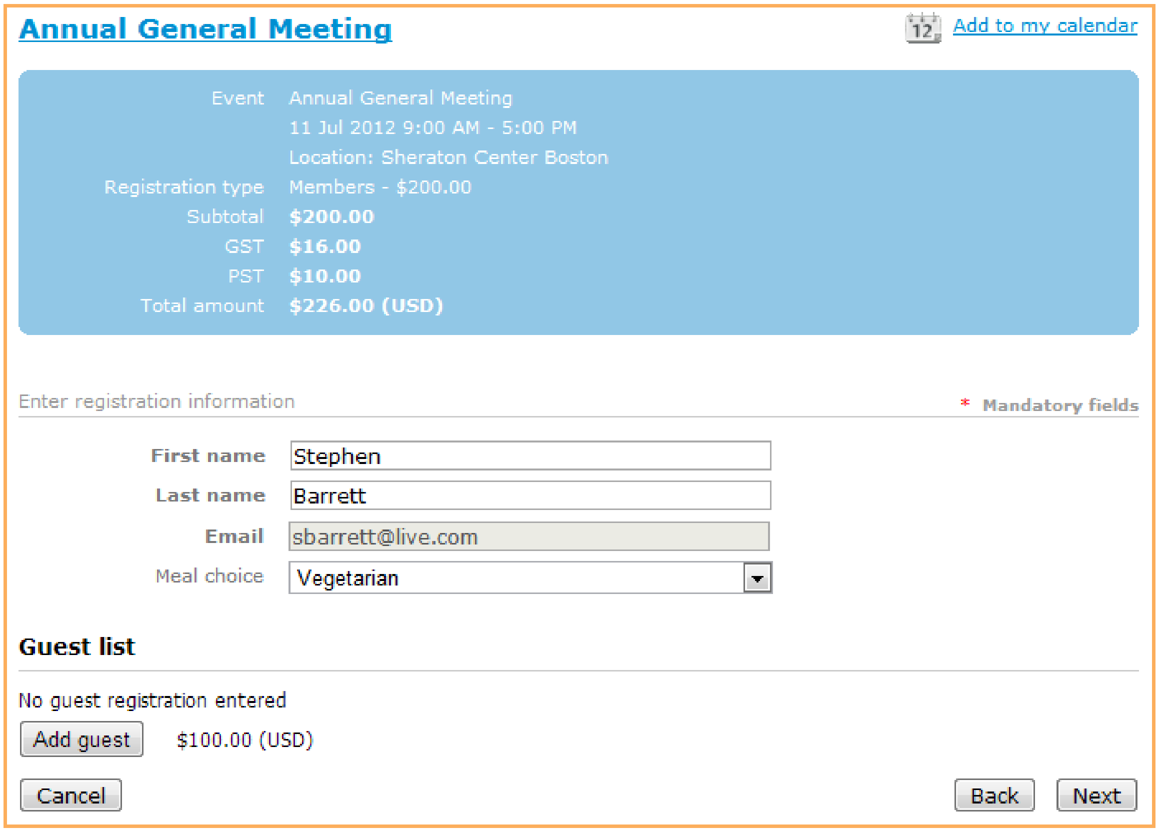


2. If there are multiple registration types, you will be asked to select a registration type.



Depending on whether you are logged on or not, some member-only registration types may not be available. If you are not logged in, but your email is already in the site's contact database, you will be prompted to log in. If your email is not in the contact database, you will be prompted to apply for membership.

3. Once you select a registration type and click **Next**, the main registration form appears.



Here, you fill out the registration form, and select additional event options, if any (e.g. meal preference, event sessions). If the event is set up with a guest registration option, you can indicate the number of guests.

4. Once you are finished filling out the form, click **Next**.
5. What happens next depends on the payment method chosen when the event was set up.
    - If only offline payment was enabled, then you will have the option of cancelling or confirming the registration. If you click the **Confirm** button, an invoice will be emailed to you, and a registration summary will be displayed. From the registration summary, you can choose to view or pay the outstanding invoice.
    - If only online payment is enabled, then a **Pay online** button will appear. Clicking the **Pay online** button will take you to the online payment screen for your site's payment provider.
    - If both online and offline payment is enabled, then two buttons will be displayed: **Pay online** and **Invoice me**. Clicking the **Pay online** button will take you to the online payment screen for your payment provider. Clicking the **Invoice me** button will result in you being emailed an invoice – which you can pay online or offline – and a registration summary being displayed. From the registration summary, you can choose to view or pay (online) the outstanding invoice.

When paying using PayPal Payments Pro, the **Pay online** button with be replaced with two buttons: **Pay with credit card**, and **PayPal Express checkout**.

Paying once for multiple transactions

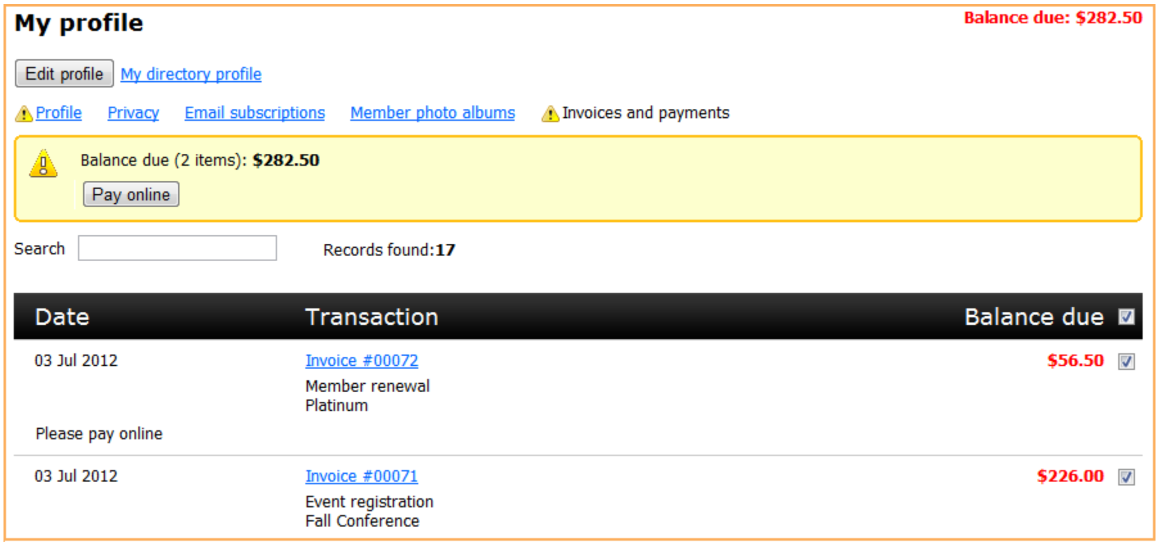
If you're registering for multiple events, or joining as a member and registering for an event at the same time, you can make a single payment for the multiple transactions. To avoid paying separately for each transaction, follow these steps:

1. For each transaction except the final one, click the **Invoice me** button rather than the **Pay online** button.
2. For the final transaction, click the **Pay online** button and all your transactions will be combined into a single payment.

Viewing invoices and making payments

If you have any unpaid invoices, a message will appear after you log into your Wild Apricot site in the bottom right corner.
Read more/less

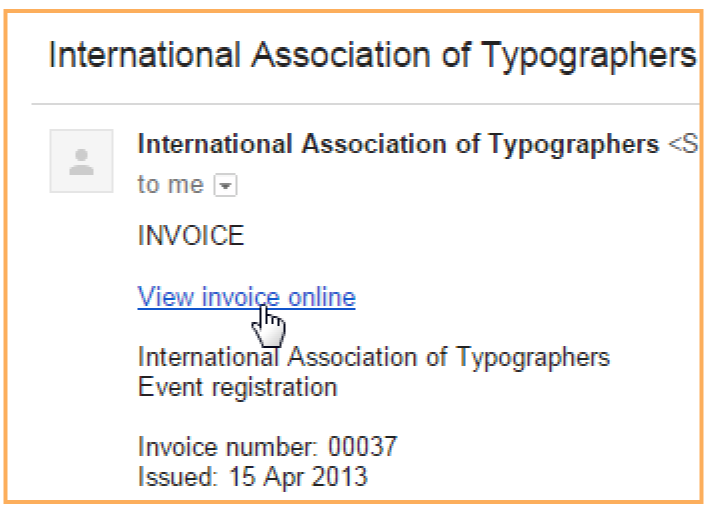
To view or pay the outstanding invoice, click the link. You will be taken to the **Invoices and payment** tab on your member profile, where you can view and pay invoices, and view past payments. You can also access this screen by displaying your member profile then clicking the **Invoices and payments** link.



Invoices with open balances (unpaid or partially paid) will be shown at the top of the screen.

To pay one or more outstanding invoices, click the checkbox beside the invoice(s) you want to pay, then click the **Pay online** button. You will be taken to an online payment screen where you can enter your credit card details.

You may also receive invoices via email. If you click the **View invoice online** link within the emailed invoice, can view and pay the invoice online without logging in.



Using discussion forums

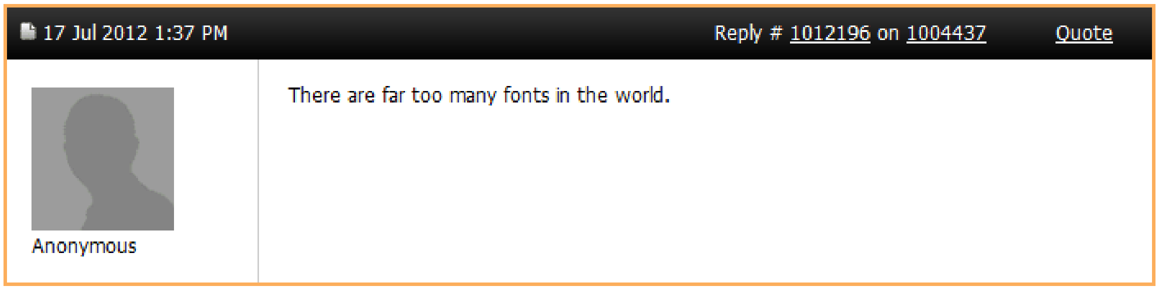
When you visit a discussion forum page, the options available to you may depend on whether you are a member, and if so, on your membership level.

Read more/less

Creating a forum topic

If you are authorized to create new forum topic, a **Create topic** button will appear above and below the topic list. After clicking this button, you can enter the subject and the body of the new topic. You can use the options appearing on the content editor toolbar to format the body text, and add links and tables. Once you are done composing the topic, click **Create**. The topic will now appear on the main forum page.

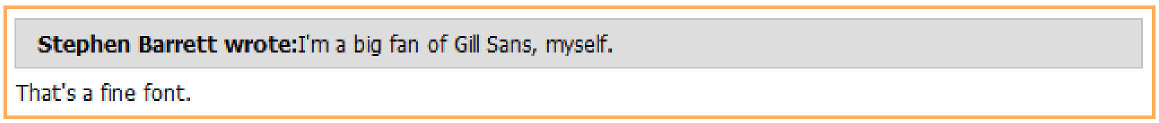
Normally, the topics you post will identify you using your first and last name. If member pictures are enabled, your picture will be displayed unless the picture field is restricted under your privacy settings. If you chose to hide your entire profile from others in your privacy settings – or if you are not a member – the topic will identify you as *Anonymous*. If you restricted access to both your first name and last name in your privacy settings, you will be identified as *Anonymous member*.



Replying and commenting on forum topics

To reply to a topic, display the topic then click the **Reply** button. After clicking this button, you can enter the body of your reply. You can use the content editor to format the text and add pictures, document, or links. Once you are done composing your reply, click **Post** .

To comment on a particular reply within a topic, click the **Quote** link above the reply. This will include in your message the text of the reply that you are commenting on. Once you are done composing your comment, click **Post**.

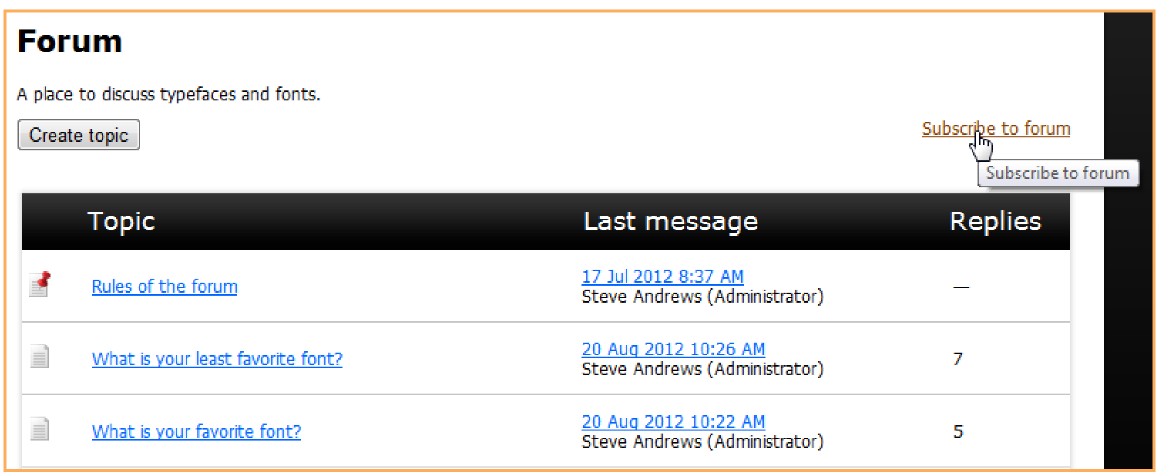


To change the order in which topic replies are displayed, click the **Show latest replies** link or the **Show oldest replies** link. You can set the order differently for different topics, and your choices will be remembered between visits.

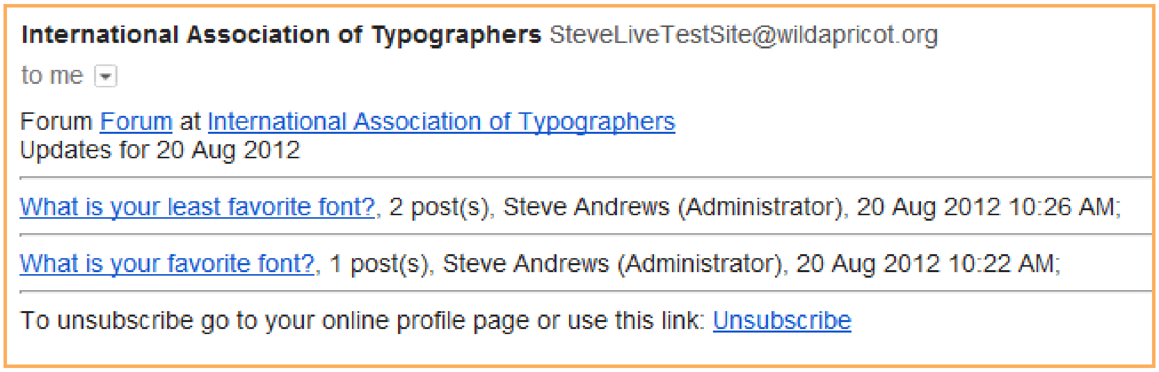
Subscribing to forums

You can subscribe to a forum, or to individual topics within the forum, so that you receive email notifications of updates. After receiving the notification, you can visit the forum to view the new topics or replies.

To subscribe to the entire forum, visit the forum page and click the **Subscribe to forum** link above the topic list.



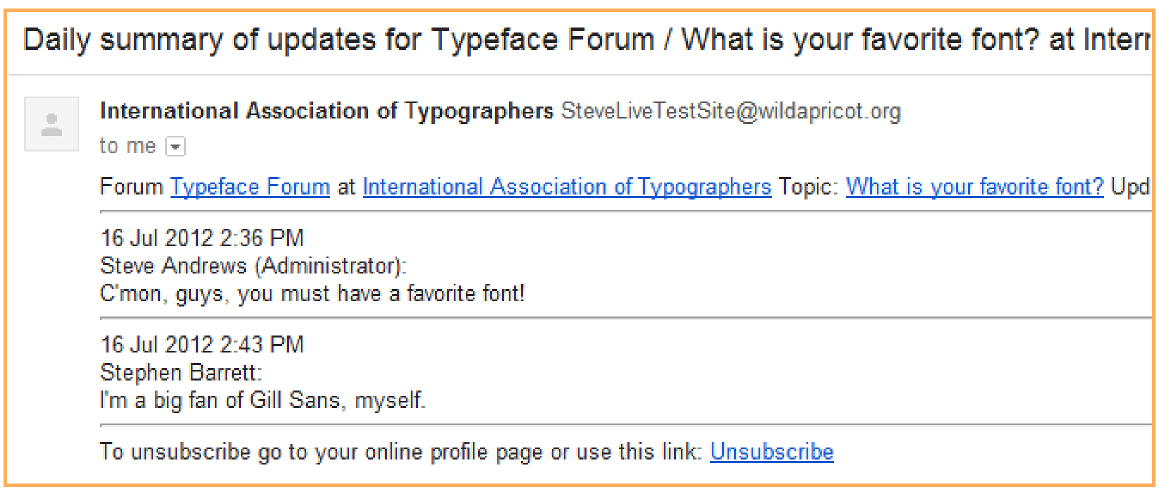
Once subscribed, you will receive email notifications of updates to any of the topics in the forum, with links to the new or updated topics.



To unsubscribe to a forum, click the **Subscribed (Unsubscribe)** link that appears in place of the **Subscribe to forum** link, or clicks the **U nsubscribe** link in the email.

To subscribe to just one topic in a forum, display the topic then click the **Subscribe to topic** link above the topic messages.

You will receive email notifications of replies or updates to this forum topic alone, with the full text of the reply or update.

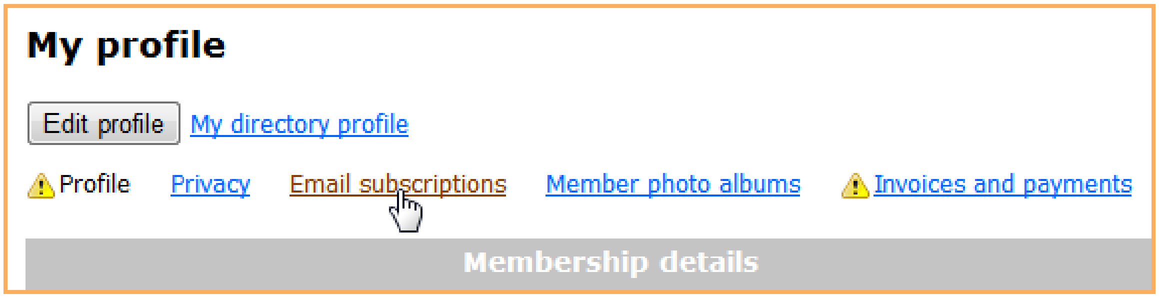


To unsubscribe to a forum topic, click the **Subscribed (Unsubscribe)** link that appears in place of the **Subscribe to topic** link, or clicks the **Unsubscribe** link in the email.

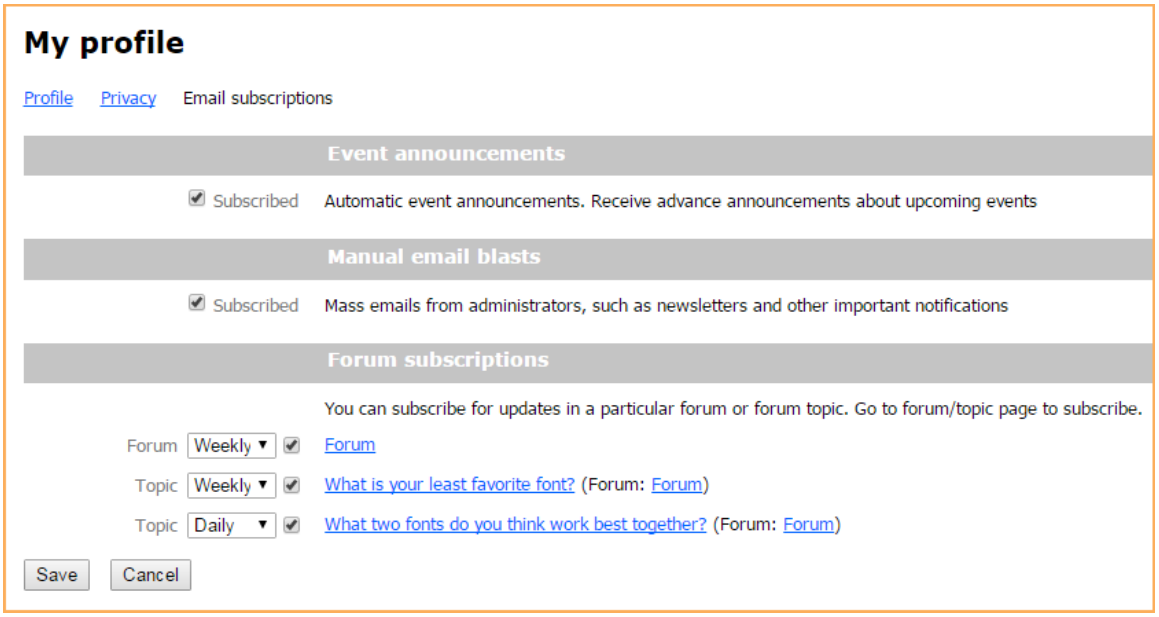
By default, email notifications of forum updates are sent on a daily basis. You can change the frequency of the email notifications from daily to weekly or immediately. Daily forum notifications contains a summary of the previous day's updates. Weekly forum notifications are sent on Sunday night/Monday morning, and contain a summary of the previous week's updates.

Managing forum subscriptions

To change your forum subscription settings, go to the **Email subscriptions** page within your member profile and click the **Edit profile** b utton.



In the **Forum subscriptions** section, you can unsubscribe from forums and topics and change the frequency of forum update notifications.



To unsubscribe to a forum or forum topic, uncheck the checkbox beside the forum or topic name. To change the frequency of the update notifications, click the dropdown and choose one of the following options:

Option	Description
Daily	A summary of forum updates for each day is sent the following day.
Weekly	A summary of forum updates for each week is sent on Sunday night/Monday morning.
Immediately	Notifications are sent immediately after an update is made (though the actual delivery could be delayed a few minutes or longer depending on the email server load).

Once you are finished making changes, click the **Save** button.

Using blogs

A blog displays a list of blog postings, with a short excerpt or abstract from each post. To view a complete blog posting, you click either the topic title or the **Read more** link below the abstract.

Read more/less

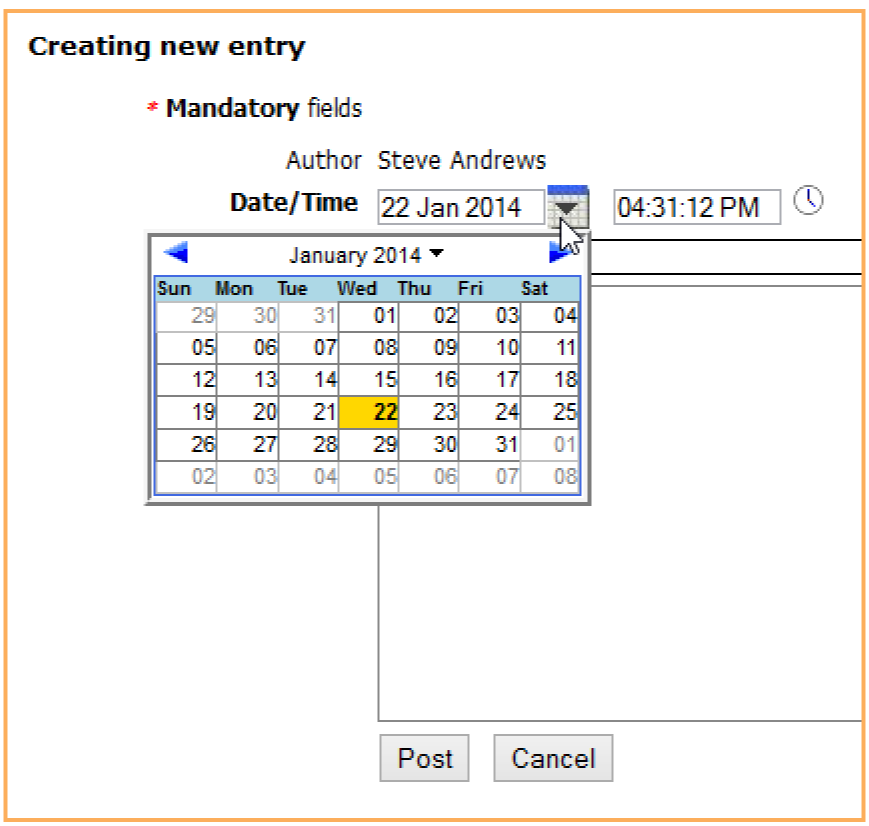
The options available to you on blogs may depend on your membership level.

Adding posts

If you are authorized to add a blog post, an **Add post** button will appear above the topic list.

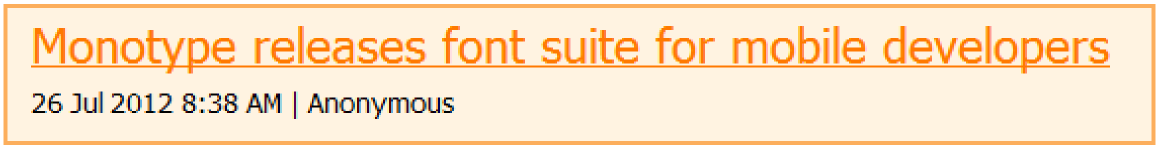
After clicking this button, you can enter the subject and the body of the new topic. You can use the options appearing on the content editor toolbar to format the body text, and add links and tables.

You can also set the posting time and date. This does not affect when the post appears on the blog – it will appear as soon as you click the **Post** button – but only the time and date that appears below the post title.



Once you are done composing the topic, click **Post**. The post will now appear on the main blog page.

Normally, the topics you post will identify you using your first and last name. If you chose to hide your profile from others in your privacy settings – or if you are not a member – your posts will identify you as *Anonymous*. If you restricted access to both your first name and last name in your privacy settings, you will be identified as *Anonymous member*.

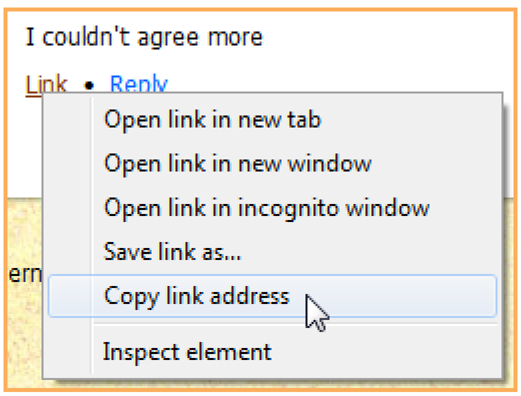


Commenting on a post

To comment on a blog post, display the topic then click the **Add comment** button. After clicking this button, you can enter your comment. You can use the options appearing on the content editor toolbar to format the text and add pictures, document, or links. Once you are done composing your comment, click **Post**.

To reply to a particular comment, click the **Reply** link below the comment. Once you are done composing your reply, click **Post**. Your reply will appear below the comment.

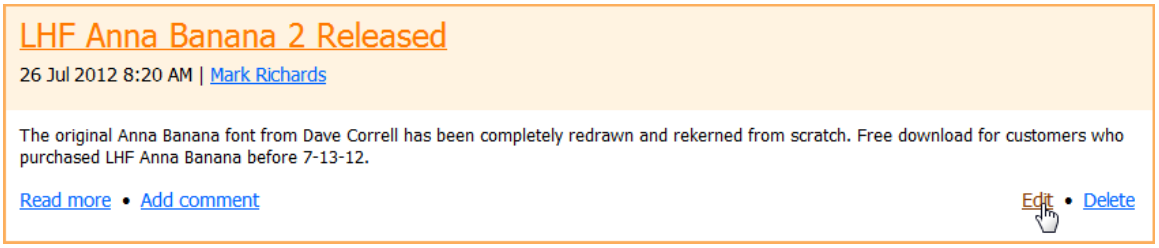
To copy a link to a comment or reply – so you can share it or link to it from another page – right click over **Link** and copy the address to your clipboard.



Modifying and deleting posts

After you've added a post, you can modify or delete it.

To modify a post, click the **Edit** link below the topic in the blog post list.

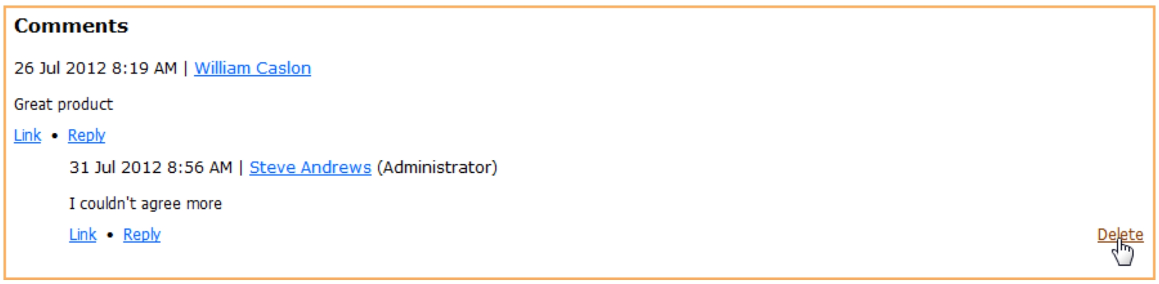


To delete a blog post, including all comments and replies, click the **Delete** link below the topic. You can only modify or delete your own posts.

Deleting comments and replies

After you've commented on a post, or replied to a comment, you can delete your comment or reply.

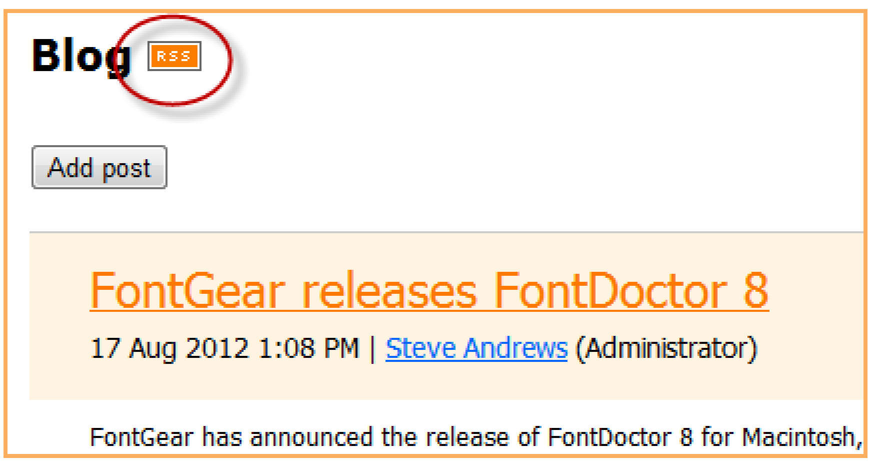
To delete a comment or reply, display the comments then click the **Delete** link.



You can only delete your own comments or replies.

Subscribing to a blog

You can subscribe to a blog and automatically receive updates in your RSS reader (e.g. Google Reader) by clicking the RSS icon that appears beside the page title.

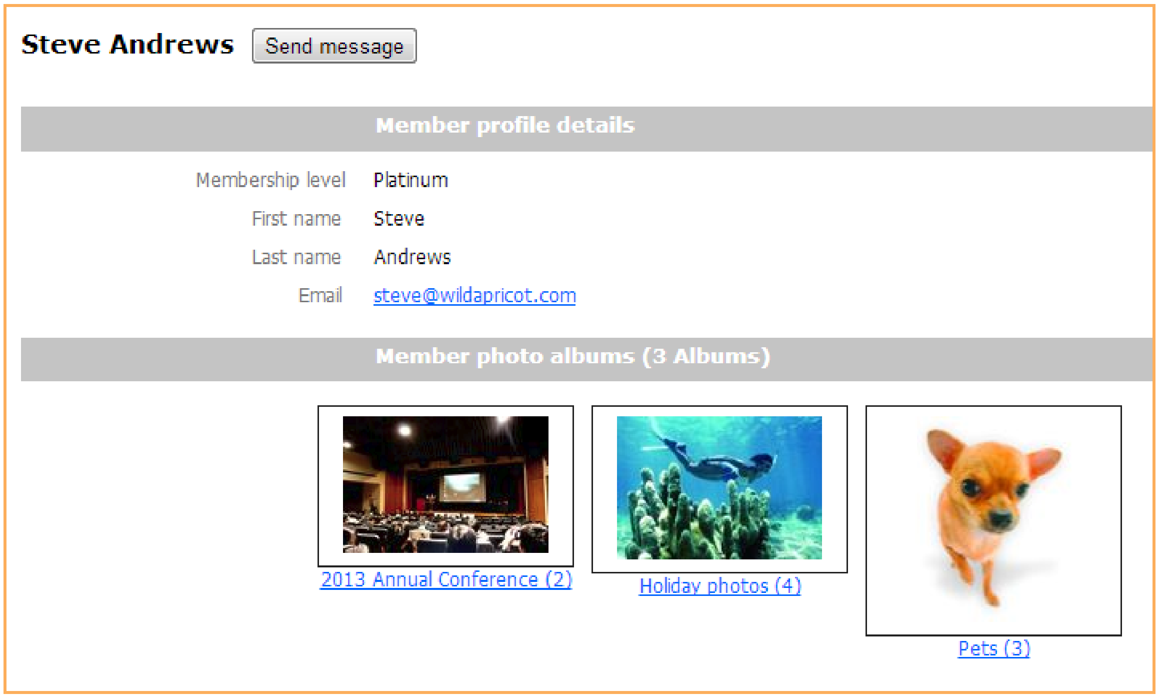


⚠ If you're using Google Chrome, you may need to add a RSS subscription extension to your browser. If the blog appears on a member-only page, the RSS feed will not be accessible to your RSS reader.

Member photo albums

If your site administrator has enabled member photo albums, you can add photos to a photo album on your member profile.

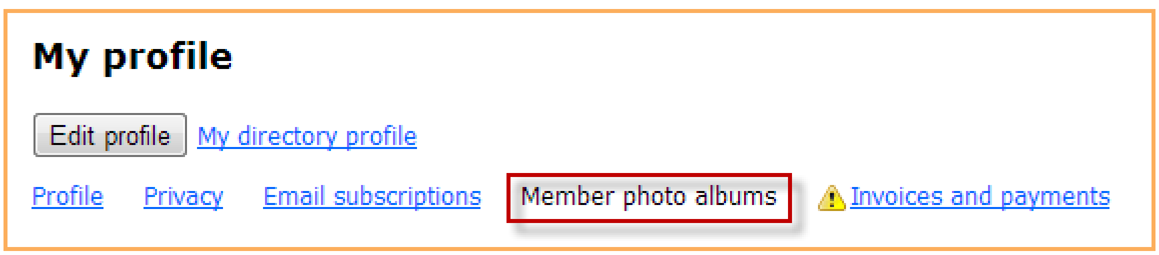
Read more/less



Members photo albums are different from the photo album pages that can appear on a Wild Apricot site.

You can create multiple photo albums and upload photos to your albums. You can add descriptions to their albums and captions to your photos. You can also control whether other members and non-members can view your albums.

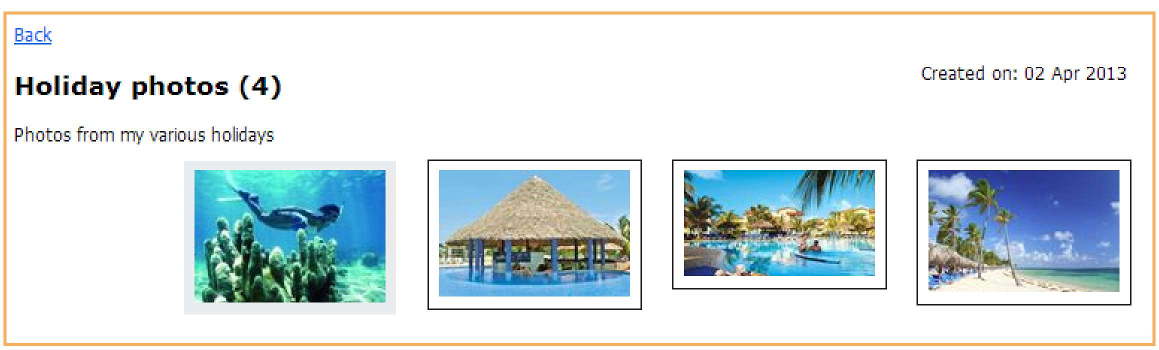
Your photo albums appear on the **Member photo albums** page within your member profile.



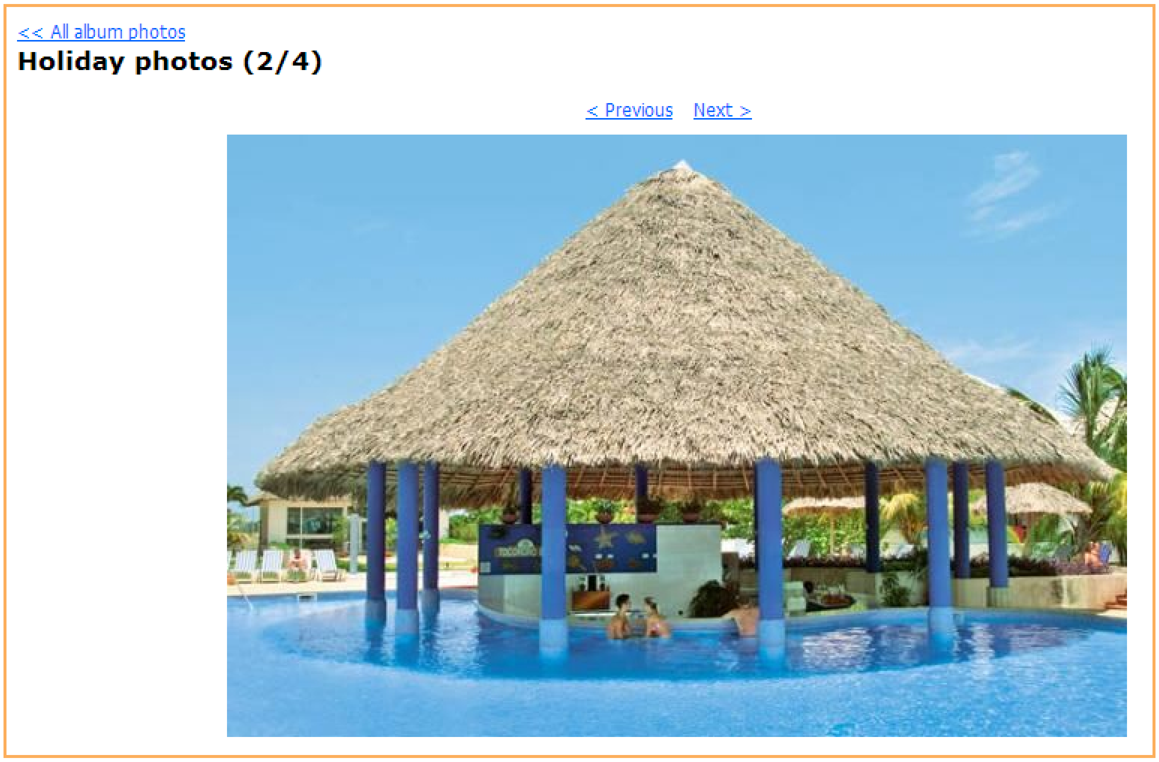
Depending on your privacy settings, your albums may also appear on your public profile which visitors can access by clicking your name within a member directory.

Viewing member photo albums

To view a photo album, you click the album name or cover. Thumbnails will be displayed for each photo in the album. If there are more than 60 photos in the album, links will appear at the top-right and bottom-right of the page to allow you to scroll through the album pages.



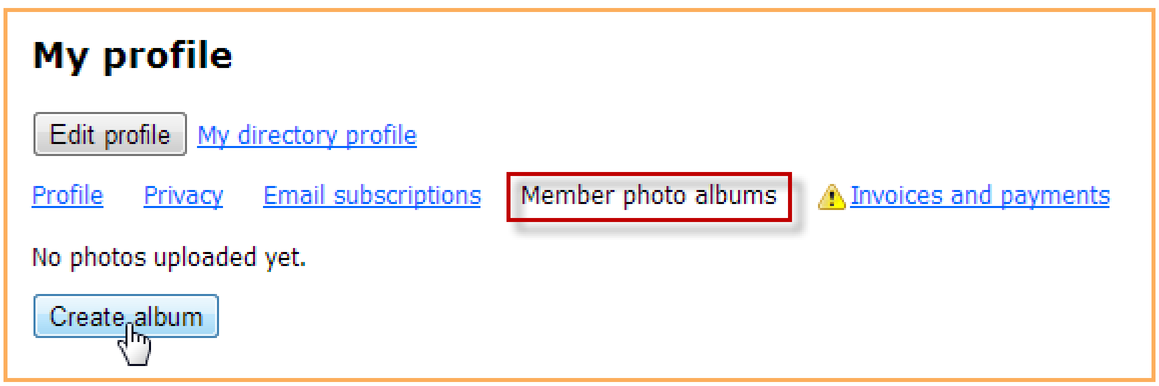
To view a larger version of a photo, click the thumbnail within the photo album page. On the individual photo page, the photo will be displayed as close to full size as can fit on the page.



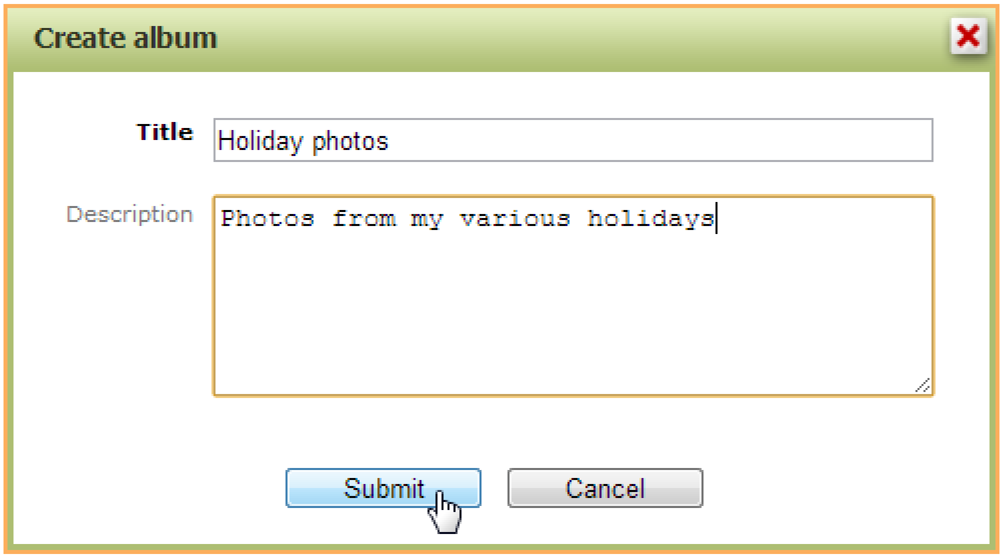
Managing member photo albums

From the **Member photo albums** page on your member profile, you can add and delete photo albums, and change the name and description of each album.

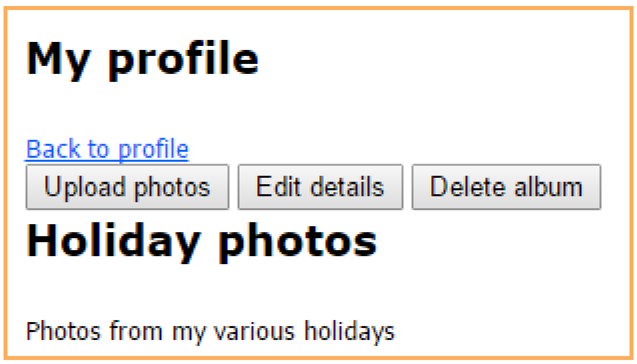
To add a photo album to your profile, click the **Create album** button, if you don't have any albums yet, or the **Add album** button if you do.



On the dialog that appears, enter a title and description for the album then click **Submit**.

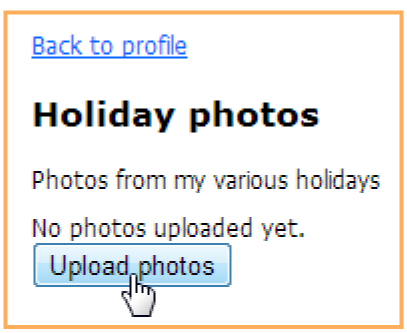


With the album now created, you can change the title and description by clicking the **Edit details** button or delete the album by clicking the **Delete album** button.

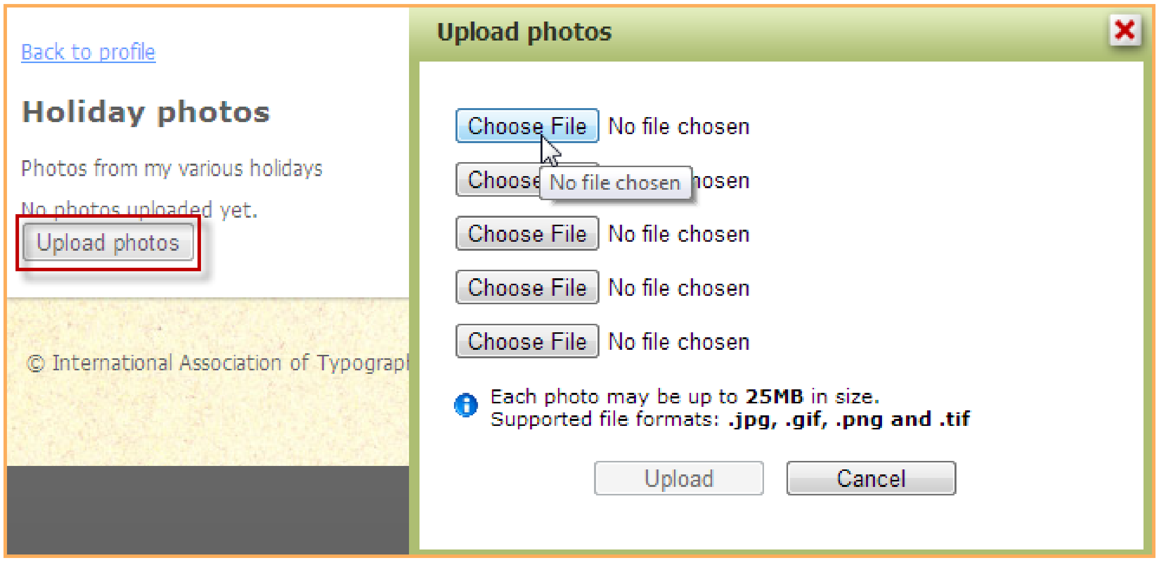


Adding photos to member photo albums

To add a photo to one of your member photo albums, open the album then click the **Upload photos** button.



On the dialog that appears, you can select up to 5 images to be uploaded at a time.



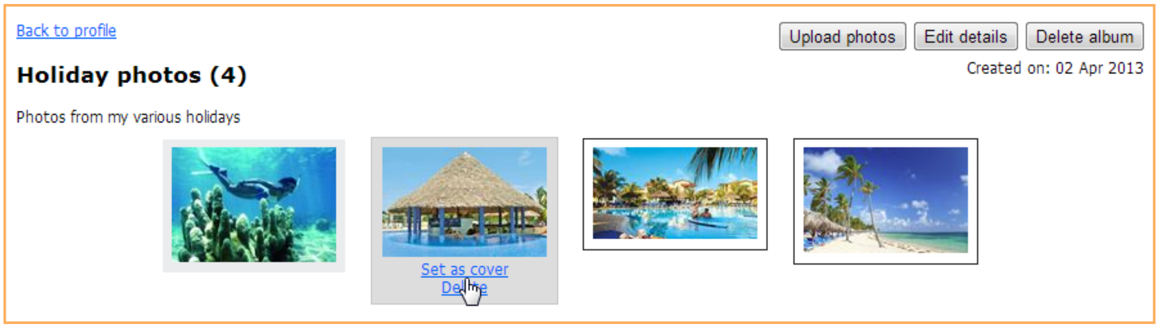
You can select photos saved using the following file formats: .jpg, .gif, .png and .tif. The maximum file size of each photo will depend on your Wild Apricot site's billing plan.

After selecting the files to be uploaded, click the **Upload** button.

Managing member album photos

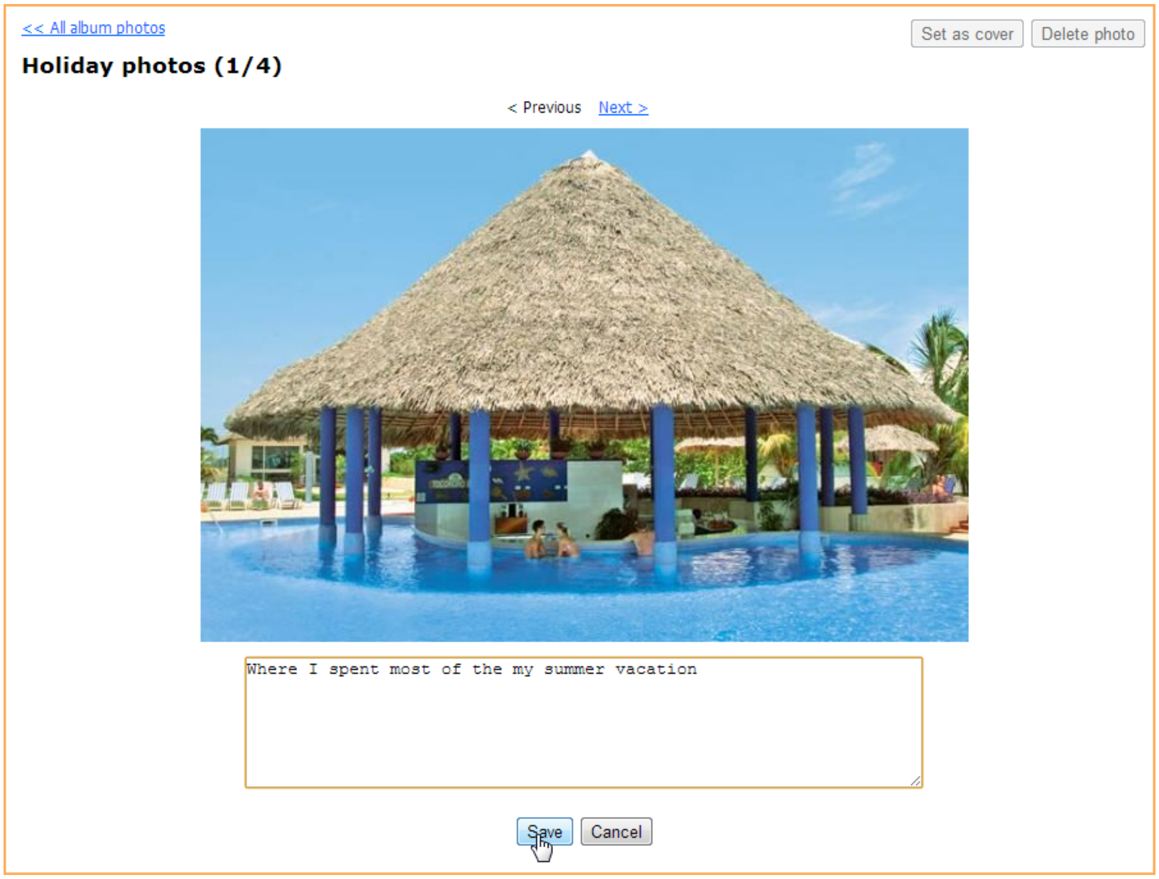
After adding photos to a photo album, you can set a photo as the album cover, assign a caption to the photo, or delete photos.

To set a photo as the album cover – so that the photo is used as the thumbnail for the album – hover over the photo within the album then click the **Set as cover** link.



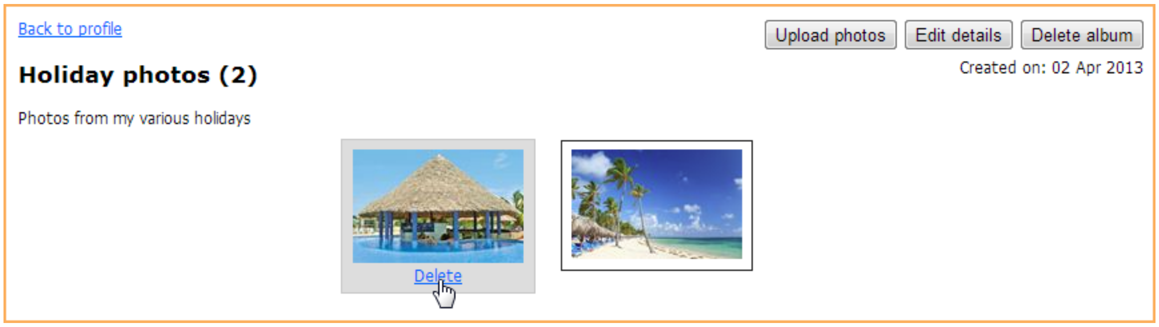
The photo will now appear as the first photo within the album, and as the album cover on the **Member photo albums** page.

To assign a caption to a photo, click the photo within the photo album, then click the **Add caption** link that appears below the photo. In the field that appears, enter the caption then click **Save** .



The caption will appear below the photo thumbnail within the album and on the individual photo page.

To a delete a photo, hover over its thumbnail within the photo album page then click the **Delete** link that appears.

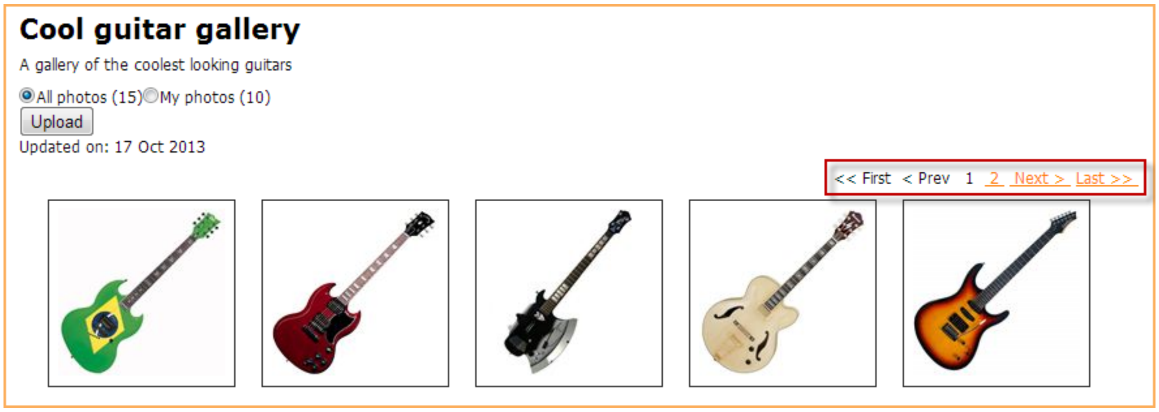


You can also delete a photo from the individual photo page by clicking the **Delete photo** button that appears in the upper right corner.

Photo album pages

Your Wild Apricot site may include a photo album page, displaying a gallery of photos.

Read more/less



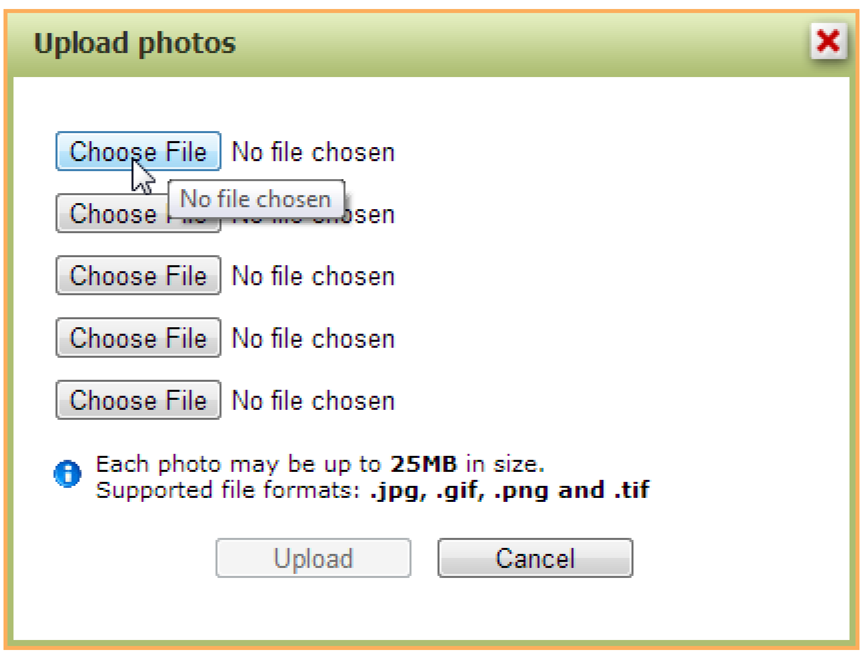
Public photo albums are different from member photo albums which appear on members' individual profiles.

Depending on the photo album settings, you can may be able to add photos to the album, or just view the existing photos.

Each photo album shows thumbnails of photos. Photos are displayed in the order in which they were uploaded. If you are logged in as a member, you have the option to show all photos or only photos that you have uploaded.

Adding photos

If you have permission to upload photos, an **Upload** button will appear. Clicking this button will display a dialog where you can select up to 5 images to be uploaded at a time.



You can select photos saved using the following file formats: .jpg, .gif, .png and .tif. The maximum file size of each photo will depend on your site's billing plan. After selecting the files to be uploaded, click the **Upload** button.

After adding a photo, you can add a caption to the image or delete the image.

Adding captions

To add a caption, click on the image within the album and then click the **Add caption** link that appears below the photo on the individual photo page.

After you enter a caption and click on **Save**, the caption will appear below the photo thumbnail and on the individual photo page.

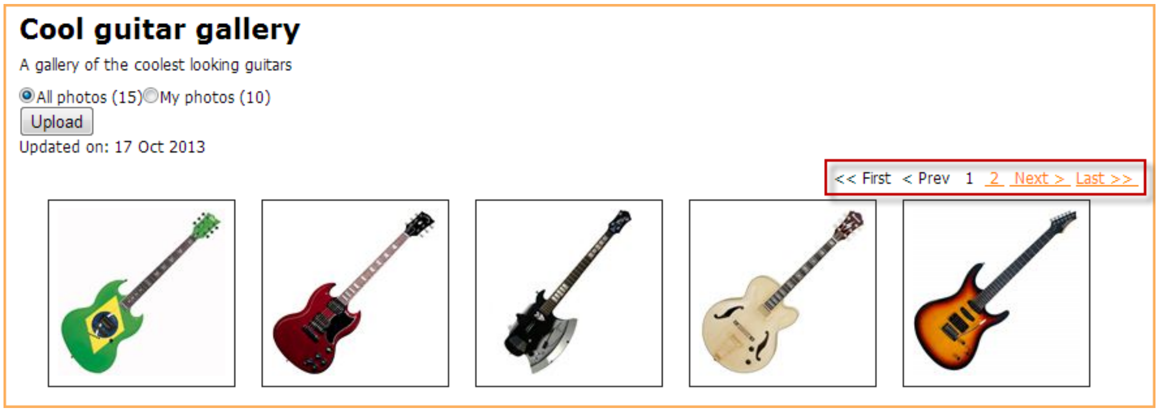
Deleting photos

You can only delete the photos you have added yourself to the photo album. To delete a photo, hover over its thumbnail within the photo album then click the **Delete** link that appears.

You can also delete a photo from the individual photo page by clicking the **Delete photo** button that appears in the upper right corner.

Viewing photos

Using the links that appear at the top-right and bottom-right of the album, you can use to scroll through the album pages.



To view a larger version of a photo, click the thumbnail within the photo album. On the individual photo page, the photo will be displayed as close to full size as can fit on the page. Above the image you will see the date the image was uploaded, as well as the name of the member who uploaded it (depending on the member's privacy settings).

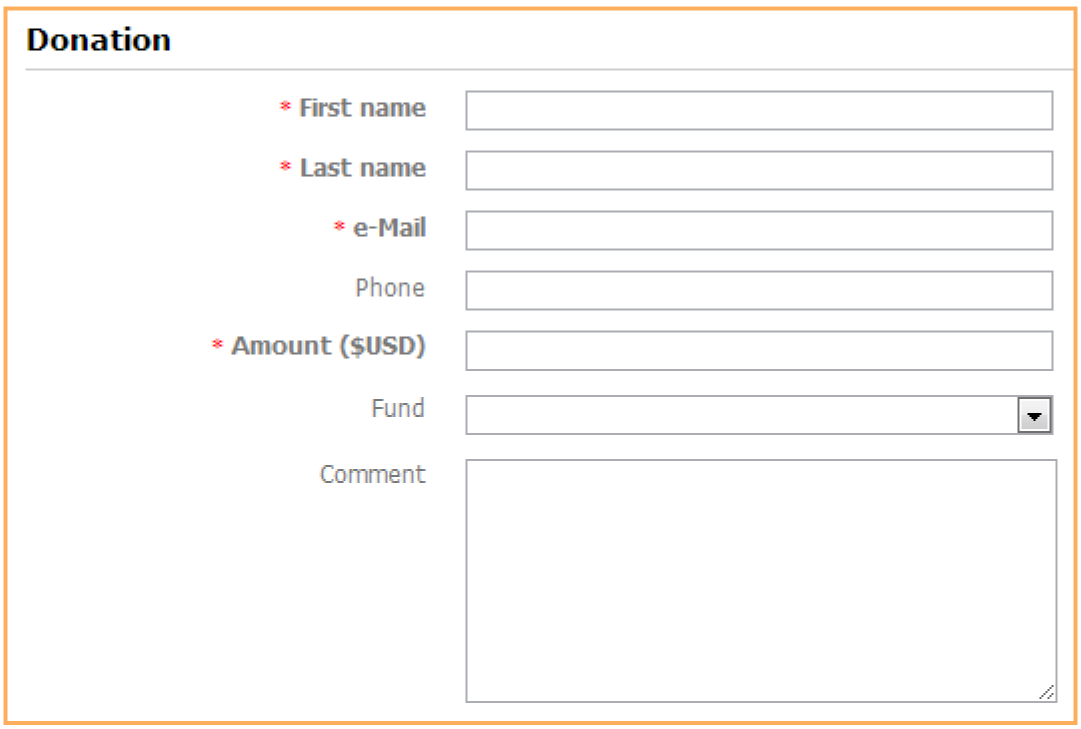
To view the full version of the photo in a separate browser tab, click the photo within the photo page. To scroll through other images in the album, click the **Previous** or **Next** links.

Making a donation

So that visitors and members can make financial contributions to your organization, your site may include an online donation form.

Read more/less

If you are already logged into your Wild Apricot account, the form will not display contact fields, only donation fields. If you are not logged in, the form will display both contact fields and donation fields.



To make an online donation, fill out the required fields on the donation form and click the **Pay** button.

Once your payment processor confirms the successful processing of the payment transaction, a confirmation email and a payment receipt will be emailed to you.

Using a subscription form

Your Wild Apricot site may include an email subscription form that you can use to sign up to receive newsletters, updates, or other email blasts.

Read more/less

Signing up for email subscriptions is separate and distinct from the process of subscribing or unsubscribing to automatic emails.

If you are already logged in to your Wild Apricot site, the contact fields will be filled in automatically, so all you have to do to subscribe is click the **Subscribe** button. If you are not already logged in, complete the subscription form fields and click the **Subscribe** button.

You can manage your subscriptions from the Email subscriptions tab on your member profile.

Using the member directory

If there's a member directory on your Wild Apricot site, you can use it to see a list of other members, search for members, and view their profiles.

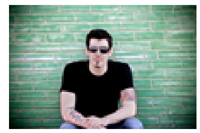
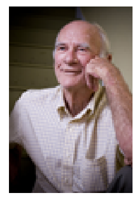
Read more/less

Member Directory

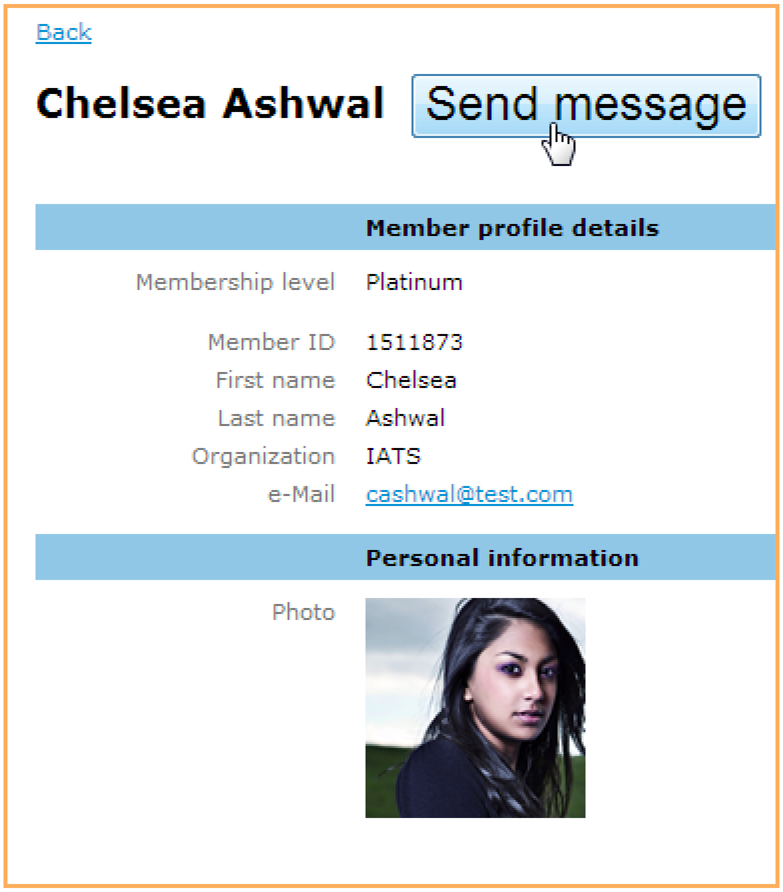
Active members of the International Association of Typographers

Advanced search...

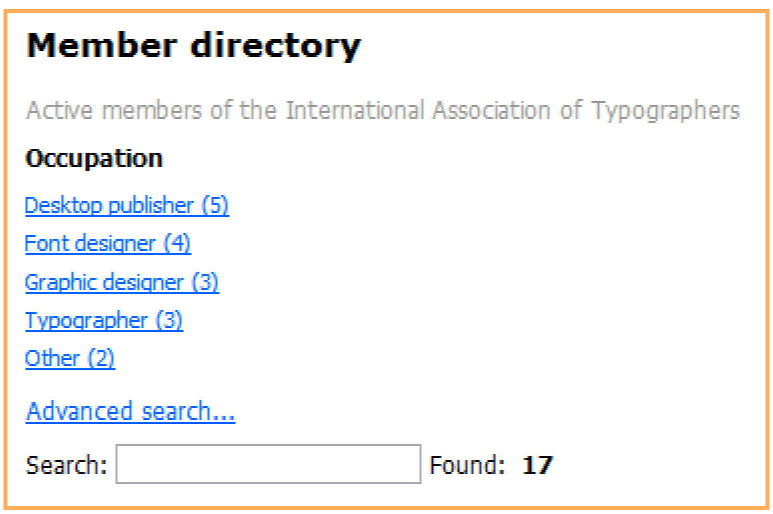
Search: Found: **27**

Name	Location	Picture	Level
Alvin Headley Graphic designer Headley Design Partners	San Francisco California United States		Gold
Augusto Sandino Font designer FontHaus	New York New York United States		Platinum
Carly Rose Graphic artist Creative Solutions	Toronto Ontario Canada		Platinum

Clicking on a member listing within the directory will display that member's profile (subject to their privacy settings).



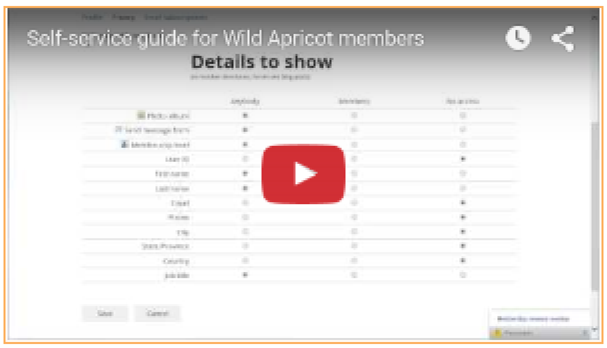
Depending on how the member directory was set up, you can filter the directory by clicking on a particular field value.



You can search for members by entering a search string in the **Search** field, or you can click the **Advanced search** link to search using a combination of different search criteria.

On some sites, the advanced search fields may appear on the member directory rather than as a separate page.

From the Privacy tab on your member profile, you can control whether your profile is viewable by others, and if so, which fields are viewable by members and non-members. If you set your profile to private – by unchecking the **Show profile to others** option in your profile – you won't appear in the member directory at all.



Member self-service guide (10:42)

On this page:

- Logging in
- Changing your password
- Updating your profile
- Changing your privacy settings
- Setting your email preferences
- Renewing your membership
- Changing your membership level
- Registering for events
- Paying once for multiple transactions
- Viewing invoices and making payments
- Using discussion forums
- Using blogs
- Member photo albums
- Photo album pages
- Making a donation
- Using a subscription form
- Using the member directory

Expand all sections

Video tutorials

Video tutorials

The following videos are designed to help you get started with Wild Apricot by introducing important concepts and illustrating common procedures.

Webinars

Click/tap to expand/collapse

- Version 5 Overview 18:16
- Getting Started with Wild Apricot 24:57
- Setting Up and Customizing Your Wild Apricot Site 19:59
- Managing Your Membership 20:13
- Setting Up and Managing Events 13:39
- Managing Your Finances 20:45

Getting started

Click/tap to expand/collapse

- Managing site administrators 4:11
- Navigating Wild Apricot 4:31
- Member self-service guide 10:42

Website design and customization

Click/tap to expand/collapse

- Setting up and customizing your site 19:59
- Using page templates 4:59
- Editing page headers and footers 3:36
- Adding and modifying website pages 9:37
- Using layouts 4:10
- Using gadgets 5:03
- Managing site pages 7:01
- Adding and formatting text 6:31
- Inserting links 7:16
- Setting up a discussion forum 6:56
- Managing forum topics and replies 4:04
- Page access and visibility 3:35
- Grouping and reordering pages 2:26
- Customizing system pages 3:46
- Managing your files 5:46
- Setting up a custom domain 3:35
- Integrating with WordPress 8:51
- Embedding Wild Apricot functionality in other websites 5:06

Contact database and membership management

Click/tap to expand/collapse

- Contact management 20:13
- Understanding member and contact statuses 7:30
- Working with member pictures 5:46
- Importing members and other contacts 5:57
- Deleting a contact 0:46
- Archiving and deleting multiple contacts 1:30
- Setting up a member directory 05:59
- Membership bundles 03:43
- Membership renewal settings 5:40
- Member groups 7:01
- Sending email blasts 5:51
- Scheduling email blasts 2:03 NEW!
- Using email templates 8:44

- Customizing and controlling automatic membership emails 3:22

Events

Click/tap to expand/collapse

- Setting up and managing events 13:39
- Setting up multi-session events 4:16
- Providing a not attending option 2:22 NEW!
- Event waitlists 4:13
- Tracking event attendance 2:55
- Viewing event registration information 5:49
- Searching for contacts with event registrations 2:20
- Customizing and controlling event emails 2:55
- Adding an event to Google Calendar 1:25
- Capping event registrations 2:57

Financial management

Click/tap to expand/collapse

- Invoices 4:51
- Recording payments and settling to invoices 5:08
- Refunds 3:53
- Setting up and applying taxes 3:33
- Exporting to QuickBooks 7:07

Processing payments

Click/tap to expand/collapse

- Choosing an Online Payment System 4:12
- Using 2Checkout to Process Online Payments 5:16
- Using Authorize.Net to Process Online Payments 5:25
- Using BluePay to Process Online Payments 5:11
- Using CRE Secure to Process Online Payments 5:29
- Using Global Payments to Process Online Payments 4:48
- Using IATS to Process Online Payments 04:15
- Using Moneris to Process Online Payments 5:08
- Using PayPal Express Checkout to Process Online Payments 6:27
- Using PayPal Payflow Pro to Process Online Payments 5:03
- Using PayPal Payments Advanced to Process Online Payments 4:48
- Using PayPal Payments Pro to Process Online Payments 7:08
- Using PayPal Payments Standard to Process Online Payments 6:44
- Using Skrill to Process Online Payments 4:37
- Using Stripe to process online payments 4:21

On this page:

Expand all sections

Cookies policy

Cookies policy

When you visit a Wild Apricot site – as an administrator, member, or visitor – cookies may be placed on your computer by Wild Apricot or a third party. A complete list of cookies placed by Wild Apricot appears below.

What is a cookie?

A cookie is a chunk of data – typically stored as text file – that is placed on your computer or other device when you visit a particular website.

Read more/less

The cookie is used to identify your device to the website when you visit again so the site can load your preferences, automatically accept your credentials, or otherwise personalize the experience. Cookies do not store personal information about you, just information identifying your device.

Accepting cookies

Within your browser settings, you can choose whether to accept cookies. To access Wild Apricot sites as an administrator or a member, you need to enable cookies (which most browsers do by default).

Third-party cookies

You can also separately control whether to accept third-party cookies – cookies placed by third party services that are integrated into the website you are visiting.

Read more/less

For example, third-party cookies are used by Google Analytics for tracking website traffic, and by Wild Apricot to embed its functionality on non-Wild Apricot sites using widgets. You only need to enable third-party cookies only if you are using third-party services that require you to do so.

By default, Safari blocks third-party cookies, while Firefox and Chrome accept them. Internet Explorer blocks third-party cookies by default but allows users to accept them from Wild Apricot and other sites. Some firewalls or browser plug-ins may affect your browser's cookies settings.

If you copied the code to embed Wild Apricot widgets on another website before June 27, 2013, visitors to the site must accept third-party cookies for the widgets to work. Widget code copied after that date does not require third-party cookies to be accepted.

The new widget code allows visitors who have blocked third-party cookies to receive cookies by first redirecting them to your Wild Apricot site – making it a visited site – before returning them to your other site that contains the Wild Apricot widgets.

Cookies placed via Wild Apricot sites

The following cookies are placed by Wild Apricot on your computer or device to support the operation of your Wild Apricot site.

Read more/less

The cookie file name is formed by combining the two-character cookie prefix with 5 random characters.

Cookie prefix	Description
wa	Main authorization cookie.
tcc	Test cookie used to determine if cookies are enabled in client browser.
ASP.NET_SessionId	Session key.
ARF	Additional session key.
cs	Used for CSRF (Cross-site request forgery) attack protection.
sk	Used to display information about incomplete applications and event registrations, open invoices etc.
pp	Stores the last opened page in public view. Used when switching between admin and public view.
ap	Stores the last opened page in admin view. Used when switching between public and admin view.

ro	Stores role of user (contact/member/admin).
hs	Used to determine if the user is viewing the site in https mode.
wb	Used for wizards (member application, event registration, etc).
wc	Also used for wizards (member application, event registration, etc).
bs	Used to display notifications in place of the Wild Apricot logo.
bc	Also used to display notifications in place of the Wild Apricot logo.

When you visit a Wild Apricot website that embeds functionality from a third-party site, the third-party site may place a cookie on your computer or device. For example, if you embed a Facebook widget on your Wild Apricot site, Facebook may place a cookie to personalize your online experience (for example, show you advertisements that reflect your interests).

If you are embedding Wild Apricot functionality on another site using widgets, a technical cookie may be saved to your visitors' computers or devices if third-party cookies are disabled in their browser.

If you have a free, ad-supported Wild Apricot account, Google AdSense will display ads on your site and place a cookie on your computer or device.

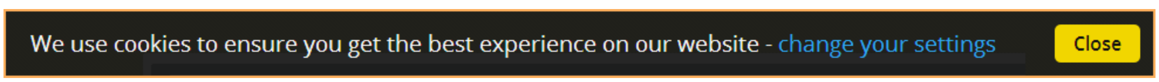
Wild Apricot uses Google Analytics for internal activity tracking, so a cookie from Google Analytics may also be placed on your computer.

Obtaining consent to use cookies

A 2011 European Union privacy law requires websites to obtain consent from visitors before placing cookies on their devices.

Read more/less

A free open source solution is available from Silktide that you can use on your Wild Apricot site to inform visitors of your site's cookie use and prompt them to change their settings to accept or reject them.



You can choose from various options then generate the code which you paste into the **Raw headers** section on the Meta-tags page in Wild Apricot. For more information on this solution, click here.

On this page:

- What is a cookie?
- Accepting cookies
- Third-party cookies
- Cookies placed via Wild Apricot sites
- Obtaining consent to use cookies

Expand all sections

See also:

- Cookies (Wikipedia)
- How to enable cookies in your Internet web browser
- Google advertising cookies
- Cookies & Google Analytics

Glossary of terms

Glossary of terms

You may encounter the following terms while using Wild Apricot.

Term	Meaning	For more info, see...
Active contact	A contact who has not been archived, and therefore appears in the contact list.	Archived vs. active records
Active member	A member in good standing – not lapsed or pending – with full member benefits (e.g. listed in member directory, access to restricted pages, etc).	How membership status affects available functionality
Administrator	A contact who has been granted permission to perform administrative functions on your Wild Apricot site. An administrator does not have to be a member.	Managing site administrators
Archived	A contact who has been temporarily removed from your contact list without being deleted from your Wild Apricot database. An archived contact does not receive email, does not count toward your database limit, and can be restored.	Archived vs. active records
Bundle	A collection of members who are linked together and managed by one of their members – the bundle administrator. Bundle members share the same renewal date, status, and membership level, and are charged a single membership fee. Bundles can be used to offer a discounted group membership to companies, teams, or families.	Membership bundles
Common field	A database field that applies to all contacts, whether members or not. Common fields can appear on membership application, event registration, and donation forms.	Customizing database fields
Contact	Anyone who appears in your Wild Apricot database. A contact can be a member, event attendee, donor, or vendor.	Contacts vs members
Gadget	An element on a web page that displays content. The content can be static content such as text or a picture, or dynamic content such as a membership registration form, a blog, or a list of upcoming events.	Gadgets
Lapsed	A member who has lost membership privileges. A member's status may be set to lapsed if they have not renewed their membership within a certain period following their renewal date. A lapsed member does not receive automatic renewal notices or appear in member directories, and is not allowed to view member only pages, add comments to blog pages, or post or reply to forum topics. Unlike a suspended member (see below), a lapsed member can restore their membership by paying the renewal fee.	How membership status affects available functionality
Layout	A grid that divides a portion of a web page into sections where gadgets can be inserted.	Layouts

Master layout	The master template that defines the basic layout of a page, and contains theme-specific graphical elements. Master layouts can only be customized through theme overrides .	Master layouts
Member	A contact who has been assigned a membership level.	Contacts vs members
Member group	A collection of members assigned to the group (e.g. volunteer committee, board of directors). Members can belong to multiple member groups, and member groups can include members from different membership levels.	Member groups
Membership level	The type of membership. Members can be assigned to different membership levels, each with its own fees, subscription periods, and renewal policies.	Membership levels
Offline payment	A payment that is made outside of Wild Apricot and must therefore be recorded manually. Examples of offline payments include cash, cheque, and direct PayPal payments (not via a Wild Apricot screen).	Manual payments
Payment gateway	A service that receives the online payment request from your website and directs it to a payment processor.	Understanding Online Payment Services
Payment processor	A service that validates the purchaser's credit card details and checks if they have sufficient funds in their account to cover the payment.	Understanding Online Payment Services
Payment provider	The company that operates the payment gateway or payment processor services. In some cases, the payment gateway and payment processor are combined into a single service known by either name.	Understanding Online Payment Services
Payment service/system	Where a payment provider offers multiple types of payment gateways – with different features and pricing – each type is referred to as a payment service or payment system.	Understanding Online Payment Services
Pending	A membership that has not been activated or renewed because it is awaiting administrator approval or payment of the membership fee.	How membership status affects available functionality
Placeholder	Area within a page template where content – in the form of layouts and gadgets – can be placed.	Placeholder settings
Registration type	An event registration option with its own price, options, and availability. Registration types are basically ticket types.	Event registration types
Suspended	A member whose membership has been revoked. A suspended member still appears as a contact, and can apply for membership.	Suspending a membership

Tender	A method of payment, such as cash, check, wire transfer, PayPal, or credit card.	Payment tenders
Template	A basic design that can be customized to produce the final version. In Wild Apricot, you can customize email templates and site page templates.	Using email templates Page templates
Theme	A set of files that define the overall look of your Wild Apricot website.	Website themes
Widget	A chunk of Wild Apricot functionality – e.g. membership application form or event calendar – that you can embed into another website	Adding Wild Apricot functionality to other websites

Member and contact management

Member and contact management

Wild Apricot software is designed for associations, clubs, non-profits, and member-based organizations. This page provides an overview of how Wild Apricot can be used to manage your members and other contacts (such as newsletter subscribers, donors, event attendees, and volunteers).

What you need to know

Click/tap to expand/collapse

- Everyone in your Wild Apricot database is a *contact* . A contact can be a member, an event attendee, a donor, a newsletter subscriber, or any combination of these roles.
- Contacts can be added automatically through your website, added manually by an administrator, or imported in bulk. For more information, see Adding a new contact manually .
- Members are a special type of contact. They can have special access to member-only pages and events, and their contact records include membership-related fields such as renewal date and member status.
- A contact becomes a member when they are assigned a membership level.
- Members can add themselves via a online membership application form, or be added manually by an administrator.
- You don't have to set the passwords yourself when adding members in bulk from a spreadsheet. Instead, following the import, you can send the new members an email blast including the {Contact_Password_Reset_URL} macro, which will appear as a link they can click on to set their own passwords.
- You can create multiple membership levels , each with different membership fees, subscription periods, renewals policies, and benefits.
- Information about each contact is stored in a separate *record* , with each record storing different chunks of information in *fields* (e.g. first name, last name, email address).
- You can customize your contact database – and your forms – by adding, modifying, reordering, and deleting database fields.
- Wild Apricot database fields are divided into two classes: *common fields* – fields that apply to all records (e.g. first name, last name, email address) – and additional fields that only apply to membership applications, event registrations, or donations.
- You can offer discounted group memberships to companies, team, or families by setting up membership bundle levels.
- You can organize members from different membership levels into member groups according to their interests or participation in committees.
- Members can be listed in a member directory, visible to everyone or just members.
- You can automate the membership renewal process with timed reminders and actions.
- To fully automate the renewal process, you can set up recurring payments .
- Members can perform various self-service functions themselves from their member profile

How do you...?

Click/tap to expand/collapse

Add a new contact

A contact may be a member of your organization, but doesn't have to be. Instead, a contact could be a donor or event attendee without necessarily being a member. Anyone who makes a donation, registers for an event, or applies to become a member will have a contact record created automatically for them.

There are several different ways you can add contacts to your database.

- Manually add them one at a time
- Import them in bulk from a spreadsheet (see Importing members and other contacts)
- By setting up a membership application form, event registration form, donation form, or subscription form on your Wild Apricot site so that visitors can sign up as members or for events, donations, or email subscriptions and thereby automatically add themselves to your contact database

For each contact, a User ID is stored. The User ID is a unique identifier that is automatically generated for each contact and cannot be modified or deleted.

When adding a new contact, you must specify one of the following contact fields: First name, Last name, Organization, or Email. The other fields can be blank but the fields themselves cannot be removed from the system.

Though the email address is optional, we recommend adding one since email address is required for contacts to sign in and perform self-service functions.

If you want to store more information about your contacts, you can add your own common fields.

For more information, see Adding a new contact manually.

Add someone as a member

There are three ways that someone can be added as a member to your Wild Apricot database:

- By members themselves, using an online self-service membership application form.
- By an administrator, using a spreadsheet to import membership data in bulk.
- By an administrator, manually, one at a time.

Turn a contact into a member

To turn a contact into a member, simply assign a membership level to the contact from the **Membership** tab on their contact record. To convert multiple contacts into members, assign membership levels in bulk through the export and import process.

Turn a member into a contact

To remove membership and turn a member into an ordinary contact, just suspend the membership. This contact is free to then re-apply using the online application form.

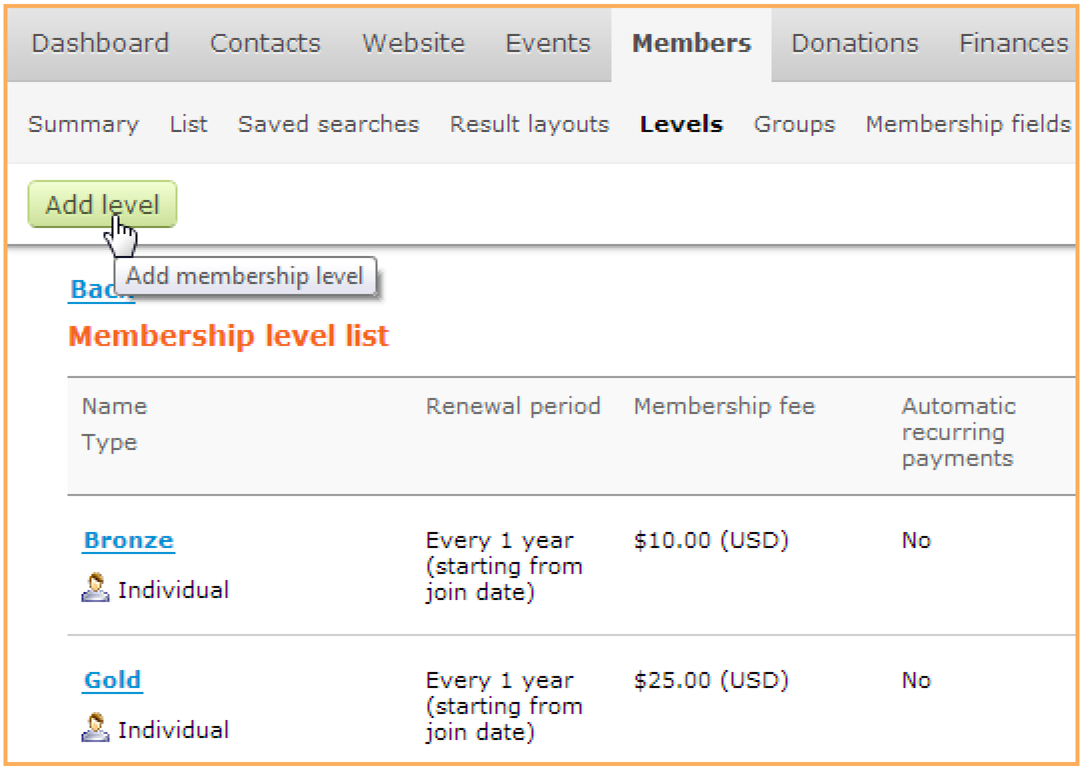
Create different membership levels

You can create multiple membership levels, each with different membership fees, subscription periods, renewals policies, and benefits. You can limit access to pages, events, event registration types, and individual membership fields by membership levels. Inclusion in a member directory can also be restricted by membership level.

There are two types of membership levels: individual and bundle. Individual membership levels allow people to join by themselves. You can set up any number of individual levels with different membership fees, subscription periods, renewals policies, and benefits. A bundle membership level allows multiple people to join your organization as a group. Bundles members share the same status, renewal date, status, and membership level. Bundles can be used to offer a discounted group membership to companies, teams, or families. For information on setting up bundle membership levels, see Membership bundles .

To set up a new individual membership level, follow these steps:

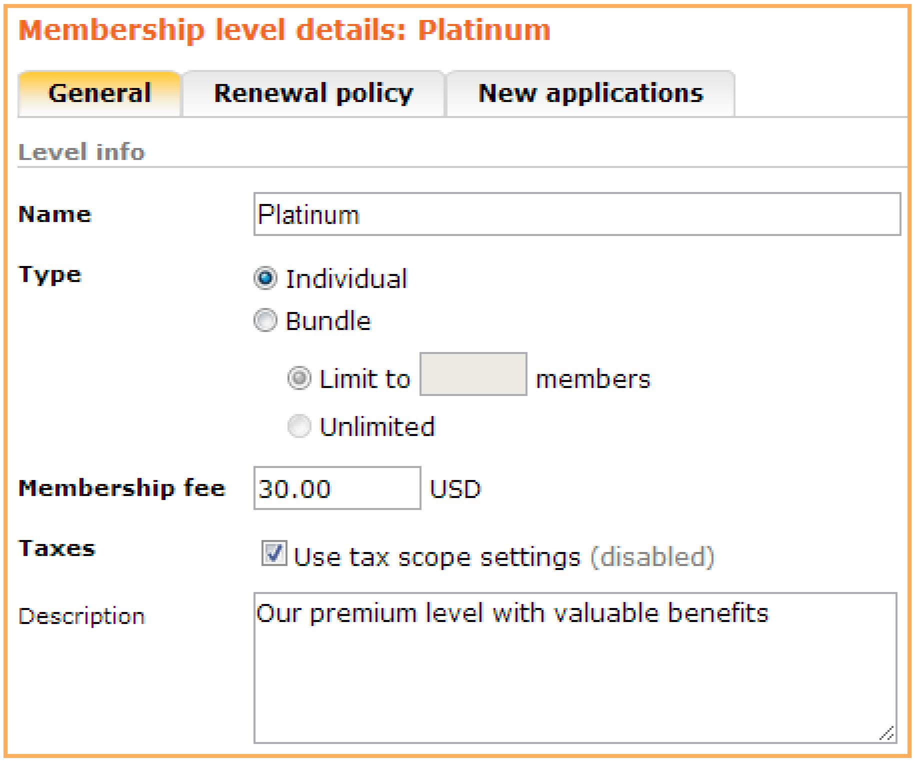
1. Hover over the **Members** menu and click the **Levels** option.
2. From the membership level list, click **Add level**.



3. Enter the name of the membership level (e.g. Gold) in the **Name** field.

> ⚠ Do not use a name that includes the < symbol. It may interfere with online payment processing.

4. Beside **Type**, click **Individual**.
5. Enter a membership fee and choose whether to apply your tax settings to the fee.
6. Enter a description for the level. The description will appear below the membership level details on the membership application form.



7. Click the **Renewal policy** tab and decide on your membership renewal policy.
8. Click the **New applications** tab and decide how you want to handle new applications.
9. Click **Save** to finish creating the membership level and add it to the membership level list.

To modify an existing membership level, click the level within the list.

For more information, see Membership levels.

Import members and other contacts

If you already have a list of members (or other contacts) in an spreadsheet, you can use it to import them into Wild Apricot.

You can also use a spreadsheet to update information for existing clients. For more information, see Bulk changes using import and export.

For information on importing membership bundles, see Importing bundles.

> ⓘ You can import existing payments and event registrations into your Wild Apricot database using the Wild Apricot API. For more information, see Payments API V2 call and EventRegistrations API V2 call.

Importing members and other contacts involves the following steps:

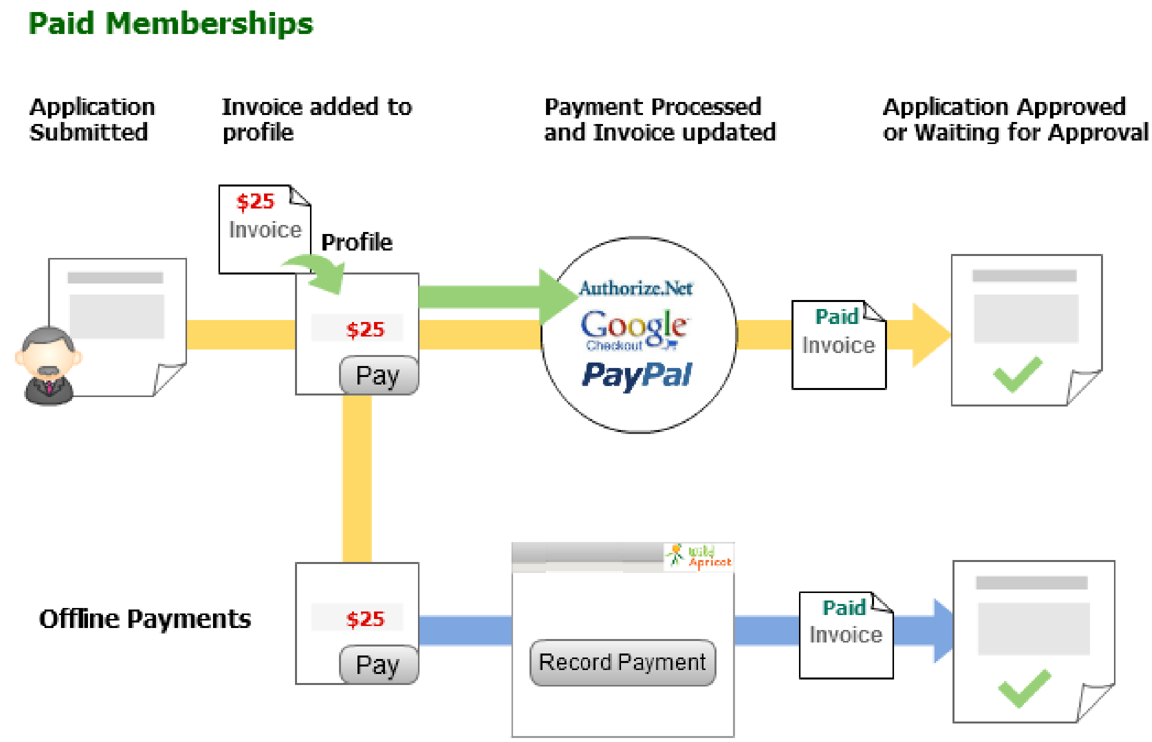
1. Preparing the import file.
2. Uploading the import file.
3. Changing the import file settings.
4. Mapping import columns to database fields.
5. Processing the import file.

For more information, see Importing members and other contacts.

Automate membership applications

Wild Apricot provides an online member application form that visitors to your site can use to apply for membership in your organization. You can add multiple application forms to your site and adjust the settings on each one so that only specific membership levels are shown. You can customize the form by adding or removing membership fields and choosing the membership levels to which the form applies.

The application process works a bit differently depending on the membership level selected by the user (Free or Paid) and the payment method used (Offline/Check vs. Online payment). Here is a high level workflow:



You have the option of requiring administrator approval of new membership applications or automatically approving them. For more information, see Member applications workflow.

For paid memberships, you can also automatically send customized receipts and invoices. Both online and offline payments can be handled. For more information, see Payment settings.

The automated confirmation emails can be customized separately for each membership level. For more information, see Customizing default membership emails.

Members can also be manually added by a site administrator, either one by one or via import.

Automate membership renewals

With Wild Apricot, you can automate the membership renewal process with timed reminders and actions for each membership level. You can provide for a membership renewal invoice to be automatically generated and emailed to members a specific number of days before their renewal date. If the member does not renew within a certain period of time, you can provide for their membership status to be set to Lapsed, their membership level to be changed, and/or their contact record to be archived.

For more information, see Membership renewal settings.

To fully automate the renewal process, you can set up recurring payments.

Customize default membership emails

You can customize the membership emails to be sent for each membership level when you set the renewal policy and new applications policy for the level. The membership emails for all levels – the uncustomized versions of the emails – are based on a single set of default membership emails.

You can modify the default membership emails so that your changes are reflected in the membership emails for all new levels. Whether your changes are reflected in existing membership emails depends on the choice you make when you save your changes to a default membership email.

The timing of the renewal reminders – how many days before the renewal date they are sent – is determined by the renewal policy se ttings for each membership level. The recipients of the renewal reminders and notifications are also determined by the renewal policy settings for the level. The recipients of the membership application emails are determined by the new application settings for the membership level.

To customize the default membership emails, hover over the **Members** menu and click the **Membership emails** option.

For more information, see Customizing default membership emails.

Customize database fields

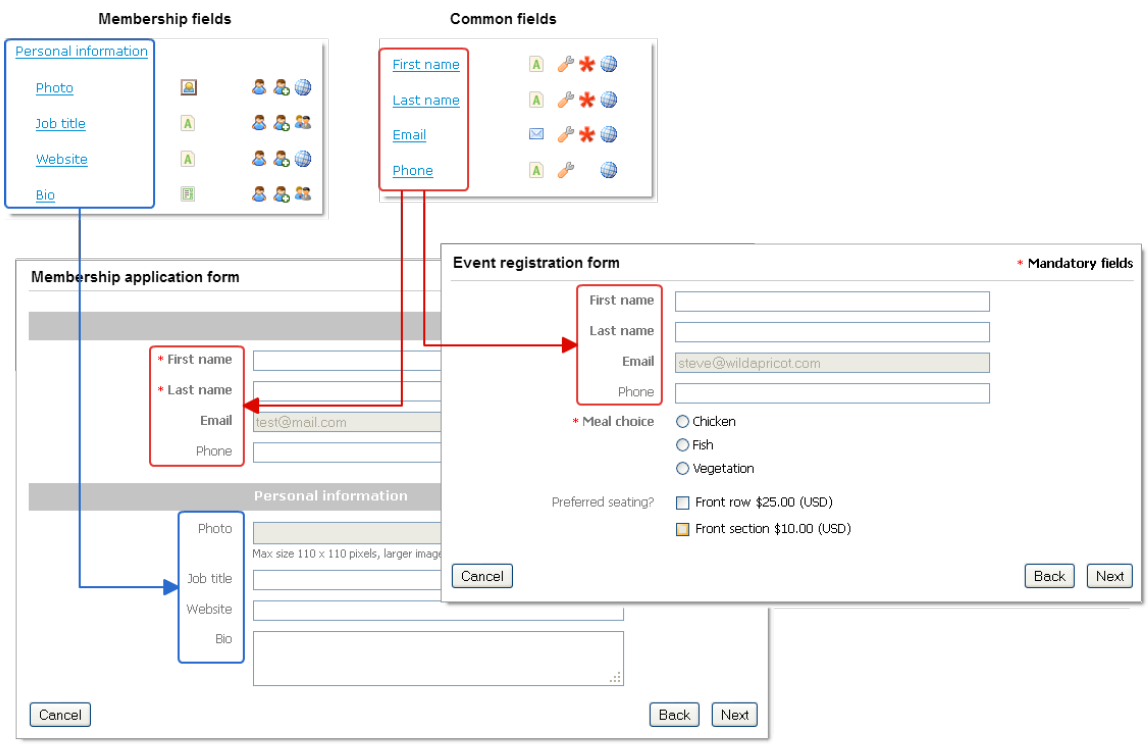
Information about each contact is stored in a separate *record*, with each record storing different chunks of information in *fields* (e.g. first name, last name, email address).

In addition to their contact record, each contact can also have a membership record, and one or more event registration records or donation records.

You can customize your contact database – and your forms – by adding, modifying, reordering, and deleting database fields.

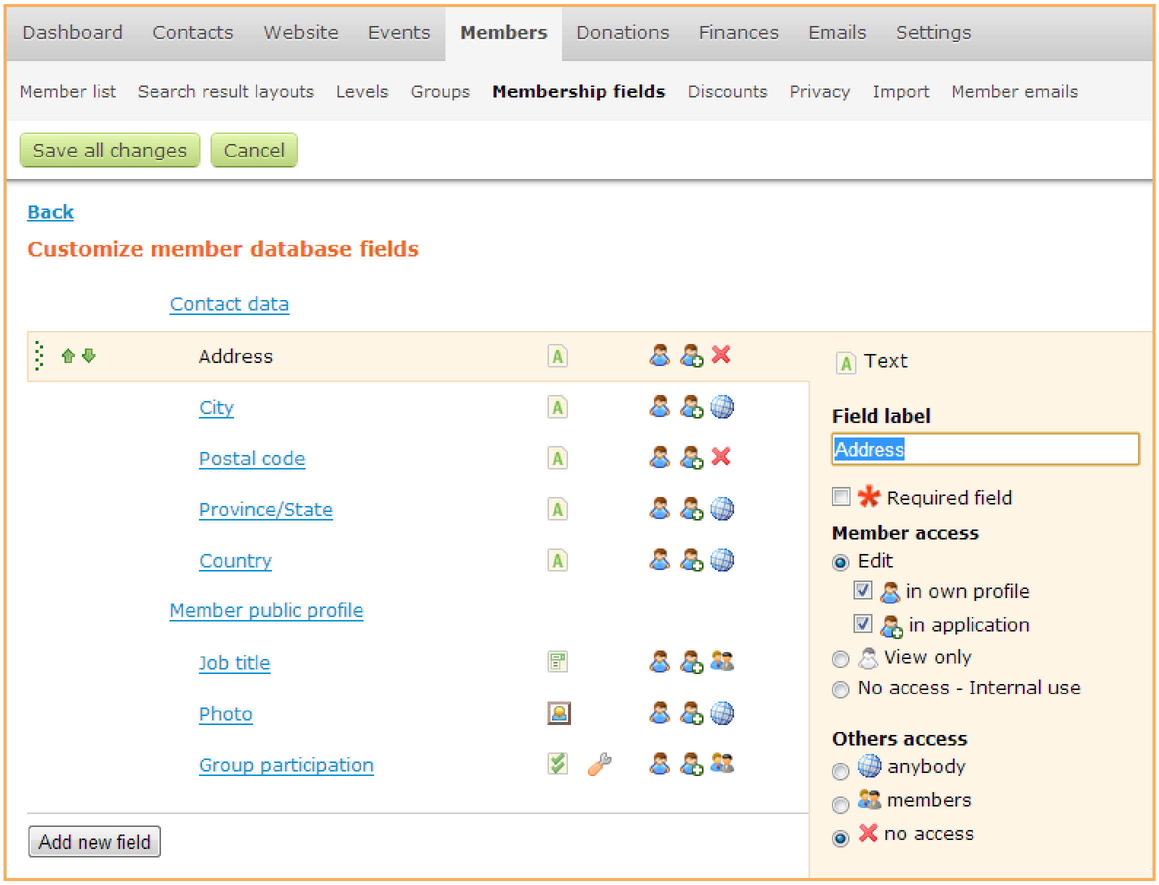
Wild Apricot database fields are divided into two classes: *common fields* – fields that apply to all records (e.g. first name, last name, email address) – and additional fields that only apply to membership applications, event registrations, or donations. Each record is a combination of common fields and fields specific to that type of record. For example, a membership record will consist of membership fields and common fields, while a donation record will consist of donation fields and common fields.

The forms that appear to the user – and are used to create records – also combine both types of fields. A membership form, for example, will display both common fields and membership fields.



To customize a form, you add or remove fields, either common or specific to the form type.

You can add any number of common fields or other database fields. You can modify, reorder, and delete existing fields (except system fields such as Member ID, First name, Last name, Organization, Email, and Phone). You can create different membership fields for different membership levels, and limit the visibility of all field types to members or administrators only.



For more information, see Customizing database fields.

Set up corporate, team, or family membership bundles

You can offer discounted group memberships to companies, team, or families by setting up membership bundle levels. A membership bundle is a group of members who are linked together and managed by one of their members – the bundle administrator. Bundle members share the same renewal date, status, and membership level.

With each bundle level you create, visitors to your site can create separate membership bundles. You could, for example, set up a bundle level called Families to allow individual families to create separate membership bundles for their family members. The membership fee for the bundle level will be applied to each bundle that is created, and will be invoiced to the bundle administrator.

For more information, see Membership bundles.

Organize members into groups

You can organize members from different membership levels into member groups according to their interests or participation in committees. For example, you could create member groups such as "Board of Directors" or "Volunteer Committee". Organizing members into member groups allows you to:

- Control page access by group
- Select the group to receive an email message

For more information, see Member groups.

Suspend, archive, and delete members

You may wish to suspend someone's membership because of misconduct or some other reason. You can also suspend a member to convert the member into a contact. Suspending a membership will:

- Remove the membership so they become a non-member contact
- Hide them from any member directory
- Keep an archive of their membership level and status
- Keep all their contact information as it was before (e.g. you can still send emails to this person)

For more information, see Suspending a membership.

If a membership is lapsed for a considerable period of time, you might want to remove the person from your contact database so that they no longer count towards your database limit. Rather than deleting the member's contact record, you can archive the record so it can be restored at a later date. Archived records are automatically excluded from receiving emails and do not count towards your database limit. Once archived, a record can be deleted at anytime. For more information, see Deleting and archiving member and contact records.

See also How membership status affects available functionality.

Search for contacts

To view a list of your contacts, click the **Contacts** tab. If you are already on another screen within the Contacts module, click the **Contact list** option.

From the contact list, you can search for a particular contact using a simple keyword search or click the **Advanced search** tab and perform an advanced search.

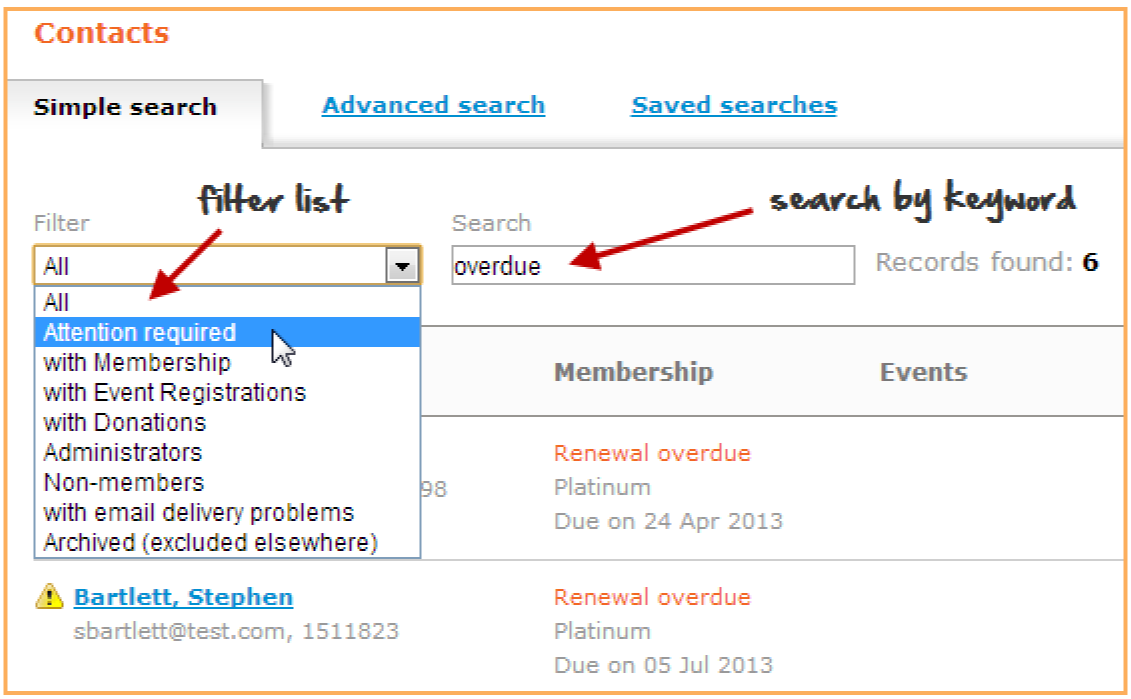
From the **Simple search** tab, you can also select from a list of predefined filters to quickly display event attendees, donors, or other types of contacts.

You can save your advanced search criteria so you can quickly and easily perform the same search again in the future (Community plans and higher).

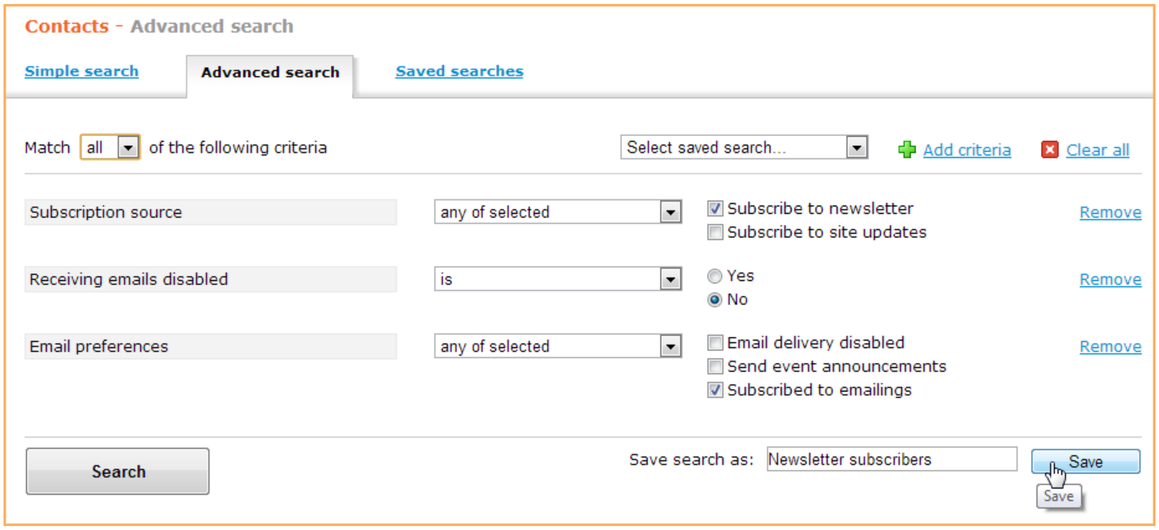
Search for members

You can search for members from either the **Contacts** tab or from the **Members** tab. You can search using a simple keyword search or click the **Advanced search** tab and perform an advanced search .

From the simple contact search, you can also select from a list of predefined filters to quickly display event attendees, donors, or other types of contacts.



Using the advanced search, you can combine multiple search criteria, and control whether any or all of the criteria needs to be met, then save your search for future use.



You can save your advanced search criteria so you can quickly and easily perform the same search again in the future.

You can control the layout of the search results – which fields are displayed and in what order – by selecting a layout before running a saved search.

To send an email blast to the entire search results, click the **Email members** button. You can create your email blasts from scratch, use a previously sent email, or choose one of the professionally designed email templates provided by Wild Apricot.

To export the search results to a spreadsheet, click the **Export** button.

For more information, see Searching and filtering contact and member records.

View membership information

Once you have your search results, you can view individual member details by clicking on members within the list. From the Contact details screen, you can use the **Prev** and **Next** button to browse through other records in the list.

To view contact information, click the **Contact details** tab. For more information, see Viewing and editing contact details .

To view membership information, click the **Membership** tab. For more information, see Viewing and editing membership details.

Merge records

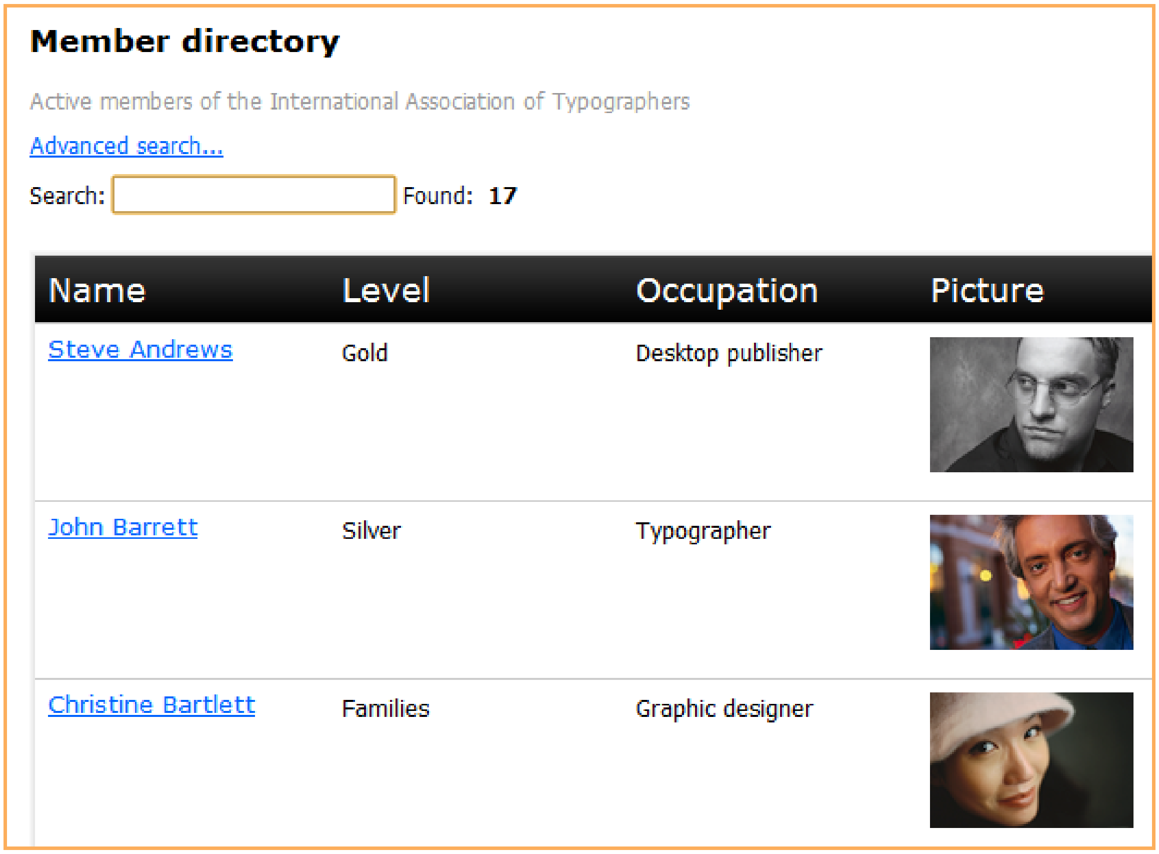
You can merge data from two contact records, so that one record with the combined data remains active and the other record is archi ved. For example, you may have a contact who signed up as a member with his primary email address, then registered for an event using an alternate email address. You don't want to keep two separate contact records for the same person, so you merge them into one.

As part of the merging process, you select the contact record you want to remain active and the other record to be merged and archived.

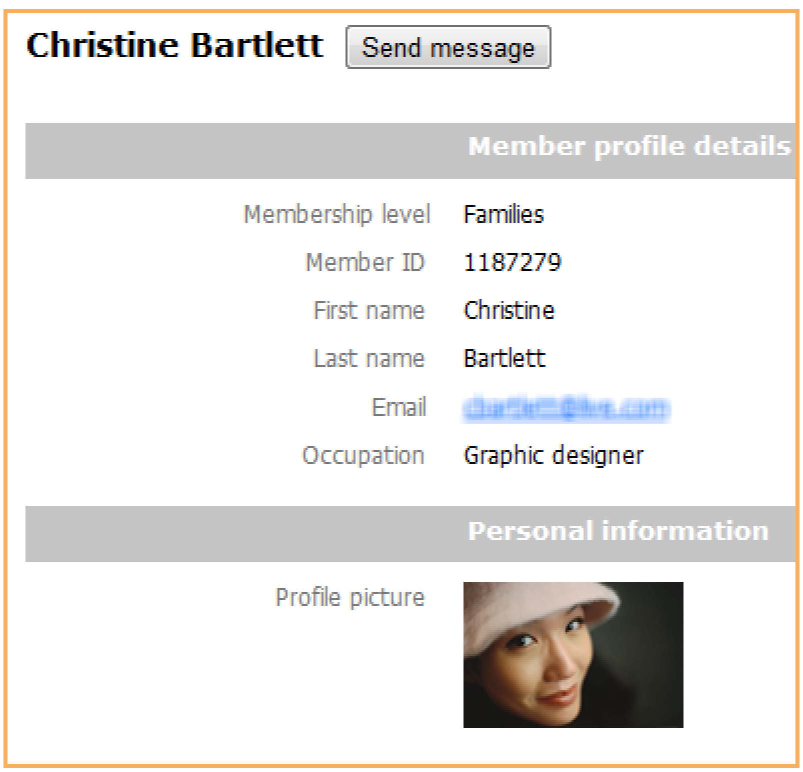
For more information, see Merging records.

Add a member directory to your website

To allow visitors to your site to see a list of your members, search for members, and view member profiles, you can add a member directory gadget to a page on your site.



Clicking on a member listing within the directory will display that member's profile (subject to their privacy settings).



You can control which members appear in the directory, restricting the list by criteria such as membership level or database fields such as city or state. You can create multiple member directories, each with different settings. For example, you could set up different member directories for members and non-members, or for different regions.

Whether a member appears in the directory also depends on that member's privacy settings.

In addition to controlling which members are displayed in the list, you can control which fields are displayed for each member and the order in which member records are sorted.

For more information, see Member directory.

Perform online member self service

One of the main advantages of using Wild Apricot is that members can perform various tasks on their own – without bothering the administrators. These tasks include:

- Renewals – Member can renew and pay online
- Upgrades – Members can switch their membership levels themselves and immediately receive the privileges of the new membership level
- Updating profiles – Members can edit their own profiles (e.g. change email address) and the changes are automatically reflected everywhere on the site
- Financial history – Members and other contacts can view a full history of past invoices and payments and pay any outstanding invoices online

For more information, see Online self-service.

Troubleshooting

Click/tap to expand/collapse

The Renew button does not appear on the Membership tab for a contact

- The **Renew** button only appears if the membership level renewal period is set to something other than *Never*, and if there is a specific renewal due date in the member record. The button will not appear for members with recurring payments.

The recurring payments option does not appear on the Renewal policy tab

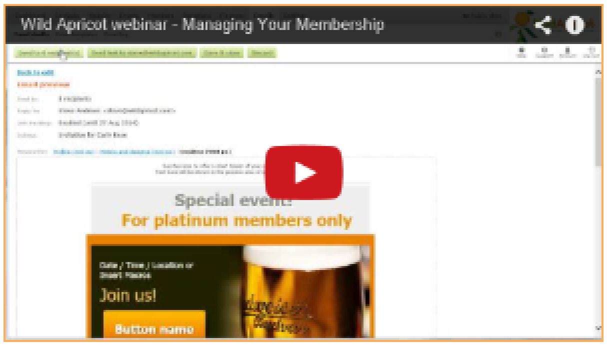
- Recurring payments are only supported for Community plans and above, and not for renewal periods greater than 1 year.

I suspended a member but his recurring payments still take place

- If the member has recurring payments with PayPal, suspending the member will not stop the recurring payments on the former member's card. The recurring payments must be stopped manually.

See also

- Contacts vs members
- Organization memberships
- Archived vs. active records
- Contact list
- Member summary and member list
- Adding members and other contacts
- Membership levels
- Membership bundles
- Membership emails
- Member groups
- Exporting members and other contacts
- Searching and filtering contact and member records
- Viewing and editing contact details
- Deleting and archiving member and contact records
- Customizing database fields
- Online self-service
- Membership renewal settings
- Manual member renewal
- Suspending a membership
- Member and contact statuses
- How membership status affects available functionality
- Printing membership cards using mail merge



Managing your membership (20:13)

On this page:

- What you need to know
- How do you...?
- Troubleshooting
- See also

Expand all sections

Contacts vs members

Contacts vs members

Everyone in your Wild Apricot database is a *contact*. A contact can be one or more of the following:

- **Member** – a contact with membership assigned (i.e. belongs to a particular membership level)
- **Event attendee** – anyone registered for at least one event
- **Donor** – a contact who has made at least one donation
- **Plain contact** – a contact with no membership, donations, or events associated with them (e.g. a newsletter subscriber)

A **member** is a special type of contact:

- They are assigned to a specific membership level.
- Members can be given special access to member only pages and events.
- They have special membership-related fields such as renewal date and member status.
- They can be listed in a member directory.
- They can be organized into member groups.

Information about contacts are stored in separate records in your contact database. Each record stores different chunks of information about each contact in fields (e.g. first name, last name, email address).

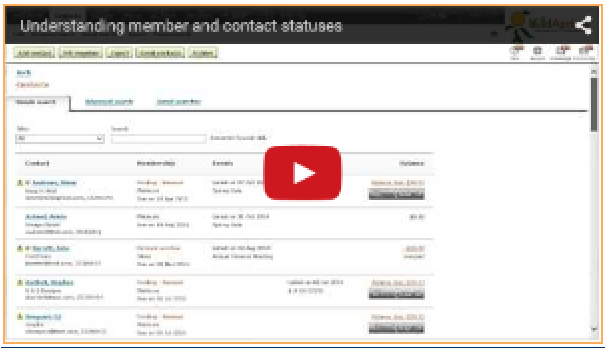
Wild Apricot database fields are divided into two types: *common fields* – fields that apply to all records (e.g. first name, last name, email address) – and additional fields that only apply to membership applications, event registrations, or donations.

Turning contacts into members

To turn a contact into a member, simply assign a membership level to the contact from the **Membership** tab on their contact record. To convert multiple contacts into members, assign membership levels in bulk through the export and import process.

Turning members into contacts

To remove membership and turn a member into an ordinary contact, just suspend the membership. This contact is free to then re-apply using the online application form.



Video: Understanding member and contact statuses (7:30)

On this page:

- Turning contacts into members
- Turning members into contacts

See also:

- How membership status affects available functionality
- Adding a new contact manually

Organization memberships

Organization memberships

Your contact database can store both individual member records and membership records for companies and other organizations.

There are two ways you can store memberships records for companies and other organizations:

- create a single member record for the organization – similar to that of an individual member, just with different fields filled out.
- create a membership bundle so that multiple people within a particular organization can join as a group.

With a membership bundle, the fee is paid as a group fee, and renewal is processed for the entire group. Each bundle is administered by a bundle administrator, and individual members within the bundle have their own separate profiles (and can log in and receive emails separately). For more information on setting up a membership bundles, see Membership bundles .

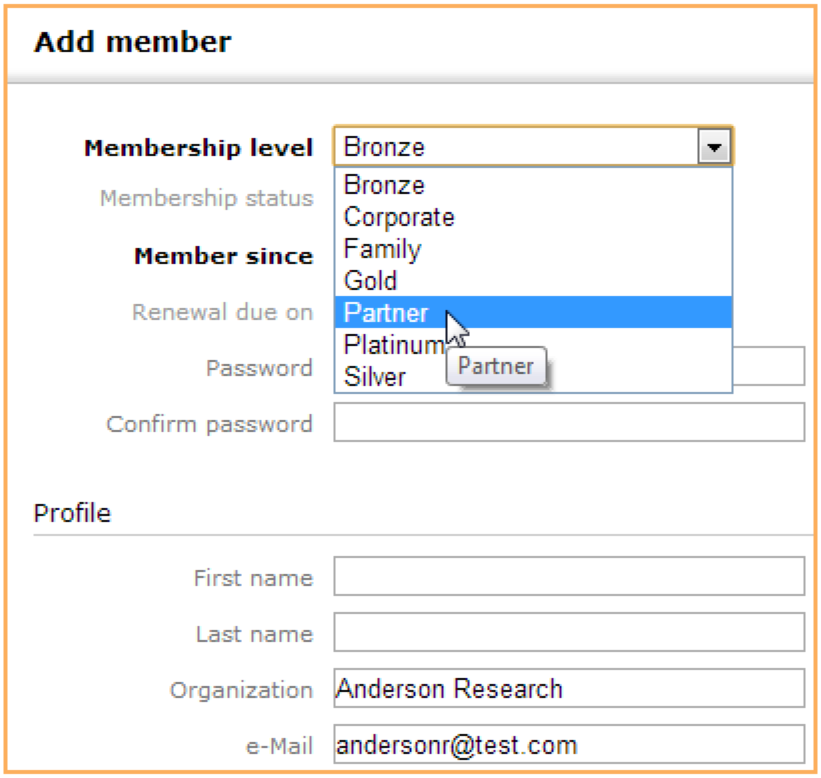
For instructions on setting up a membership record for an organization, see below.

Setting up organization members

To set up a membership record for an organization, follow these steps:

Read more/less

1. Set up a special membership level for organizations (e.g. Partner).
2. Create a new member record.
3. Complete the **Organization** and **Email** fields, and leave the **First name** and **Last Name** fields blank.
4. Assign the new member record to the special membership level you set up for organizations.



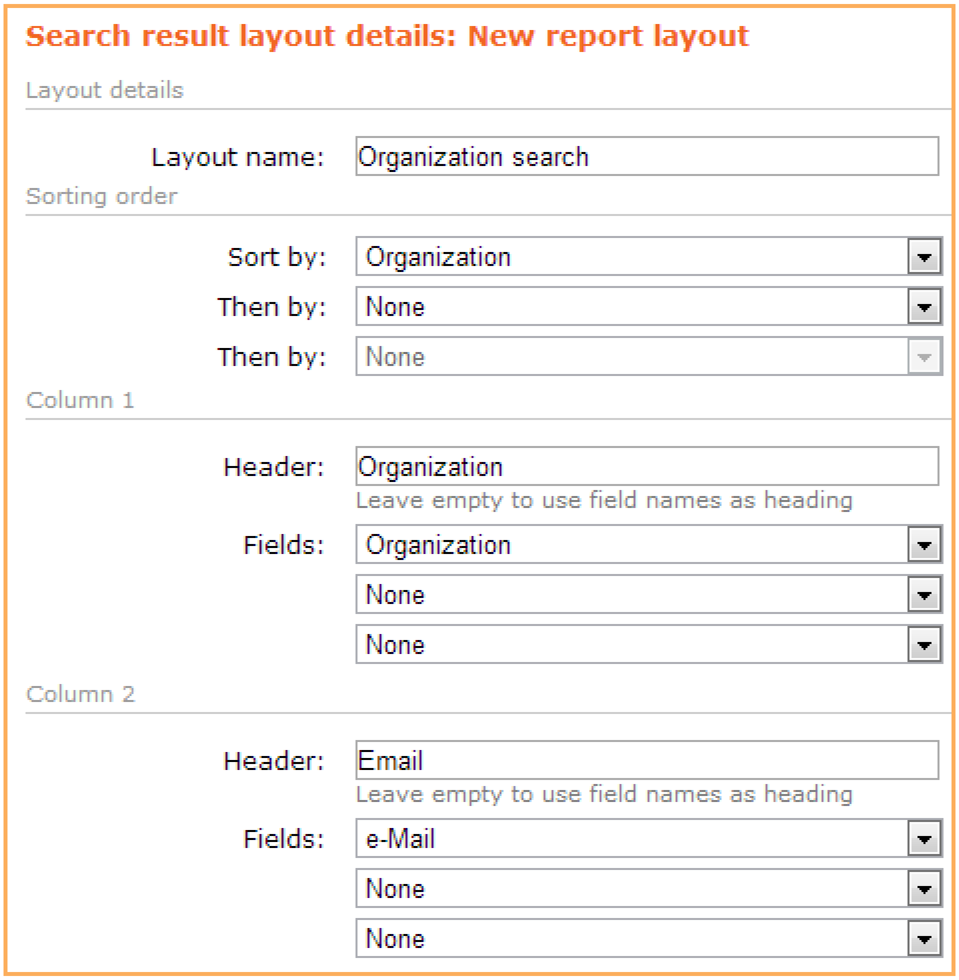
5. Click the **Save** to save the new member record.

Searching for organization members

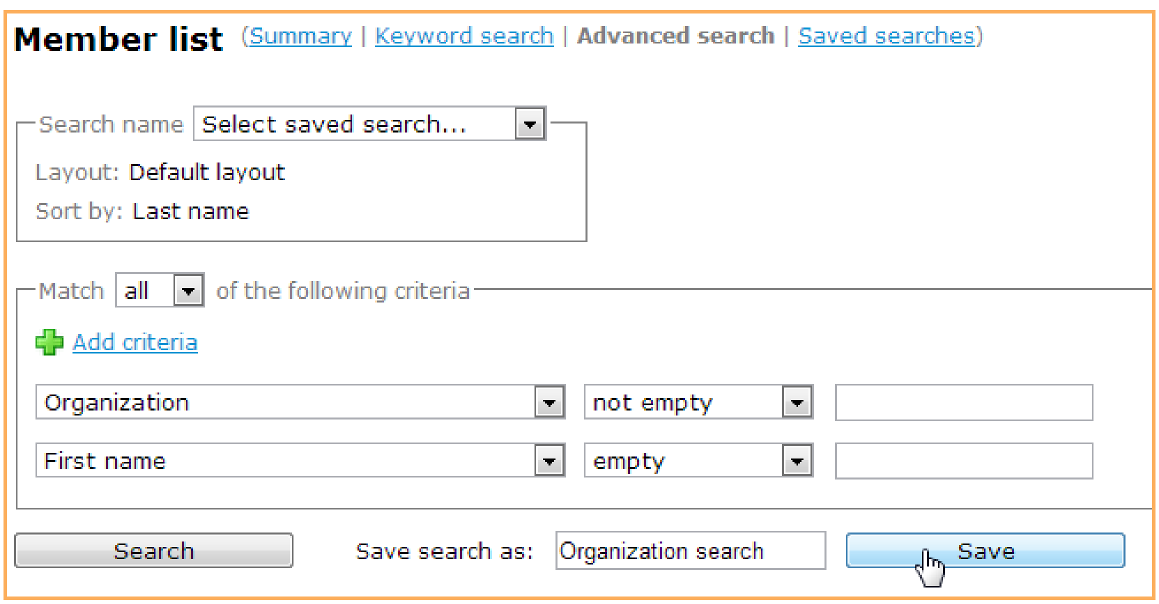
To search for organization members, follow these steps:

Read more/less

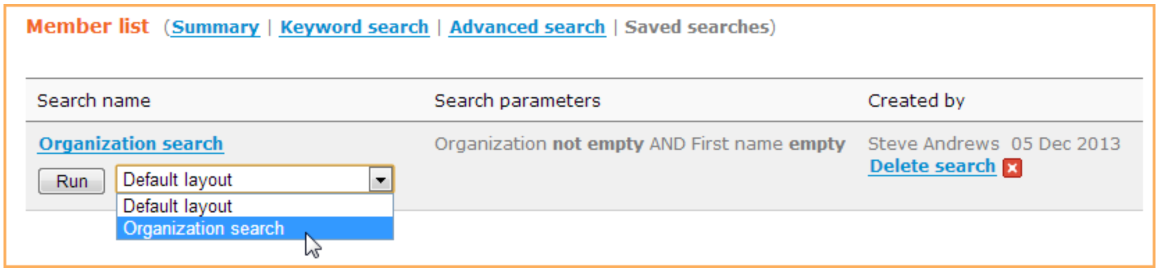
1. Create a custom search layout to display Organization and Email columns, and sort by Organization.



2. Perform an advanced member search for records where the Organization field is not empty but the First name field is empty.
3. Save the search.

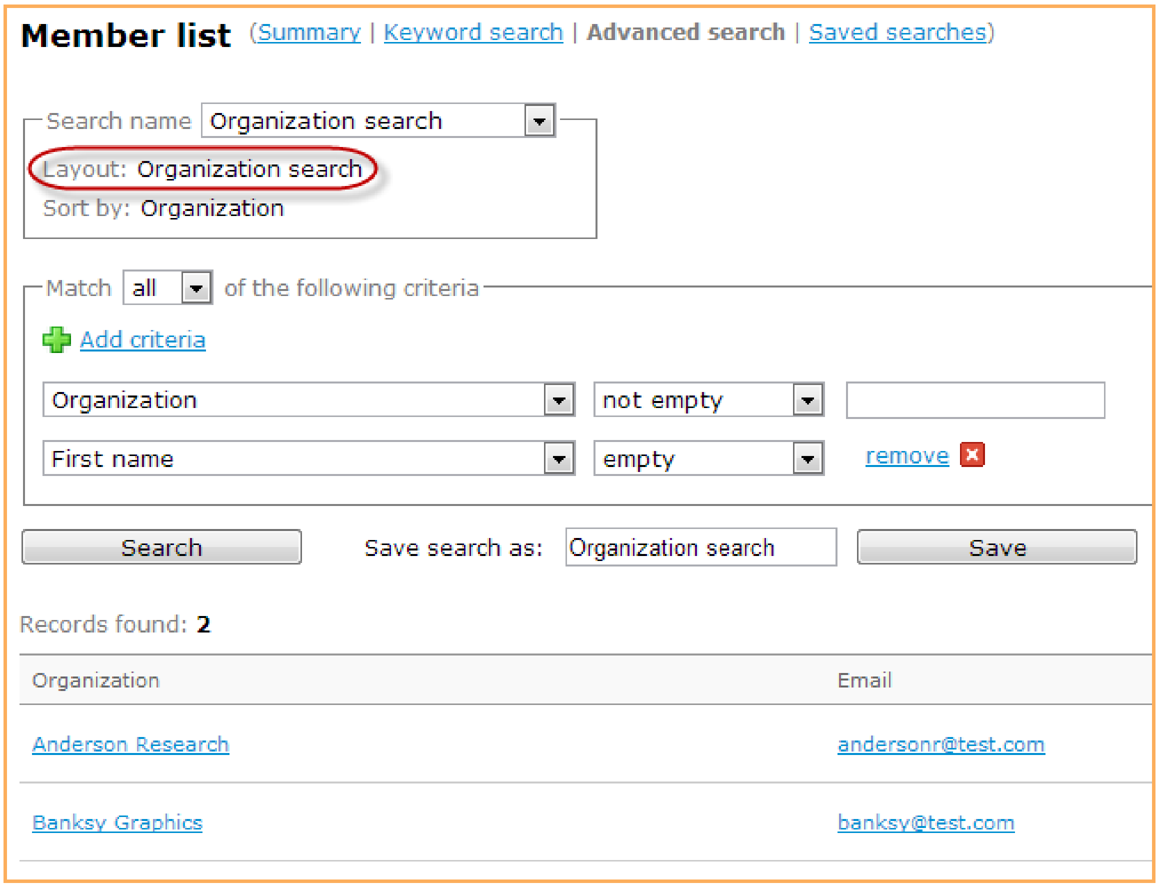


4. Go to the **Saved searches** tab and select the custom search layout you created for organizations.



5. Click the **Run** button for the saved search you created for organizations.

You should now see a list of the organization members you added to your contact database.



On this page:

Expand all sections

See also:

- Contacts vs members
- Customizing database fields

Archived vs. active records

Archived vs. active records

If you have inactive contact records that you don't want to delete, but don't want to have count against your database limit, you can archive them. Archived contacts are automatically excluded from email blasts, including automatic event notices. However, an archived contact is automatically restored when he or she logs in to your Wild Apricot site.

Archiving is the first step in deleting – permanently removing – a contact from your database. An archived record – unlike a deleted one – can be restored at a later date. A record can be archived and restored as many times as needed without any loss of data.

Contact records can be archived one at a time or in bulk, either from your contact list or using Wild Apricot's import and export options. For more information, see Deleting and archiving member and contact records.

You can also suspend a contact. Suspending a contact strips them of membership so they become a non-member contact. For more information, see Suspending a membership.

Differences between archived and active records

There are several differences between how archived and active records are treated in Wild Apricot.

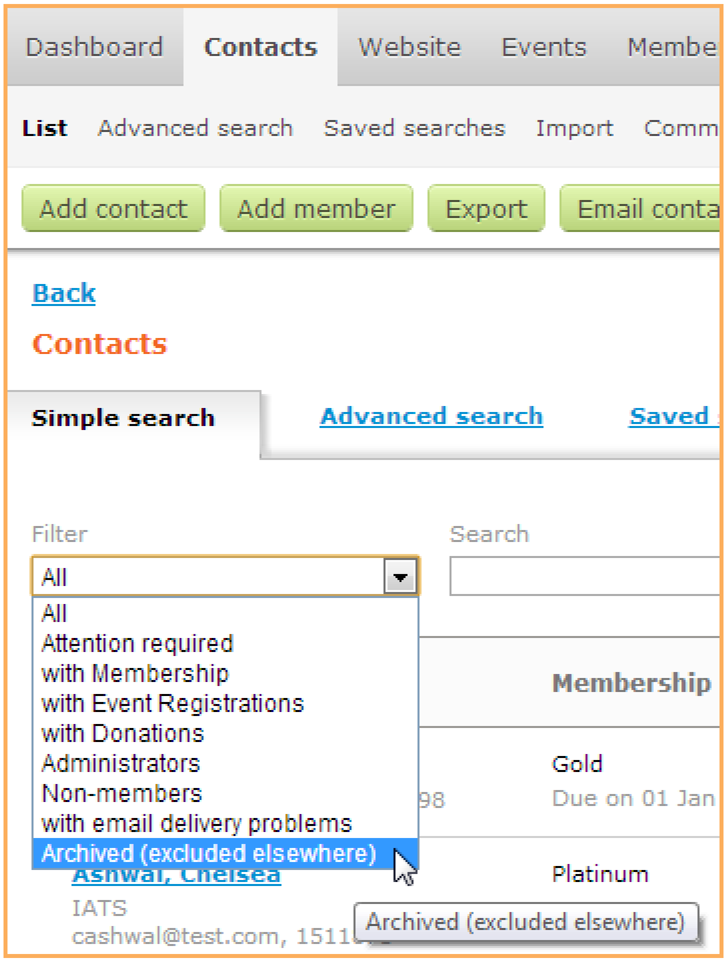
Read more/less

	Archived records	Active records
Displayed in unfiltered contact list	No	Yes
Counts towards contact database limit?	No	Yes
Automatically excluded from email blasts?	Yes	No
Receive automatic event notices?	No	Yes
Record can be modified?	No	Yes
Record can be deleted?	Yes	No

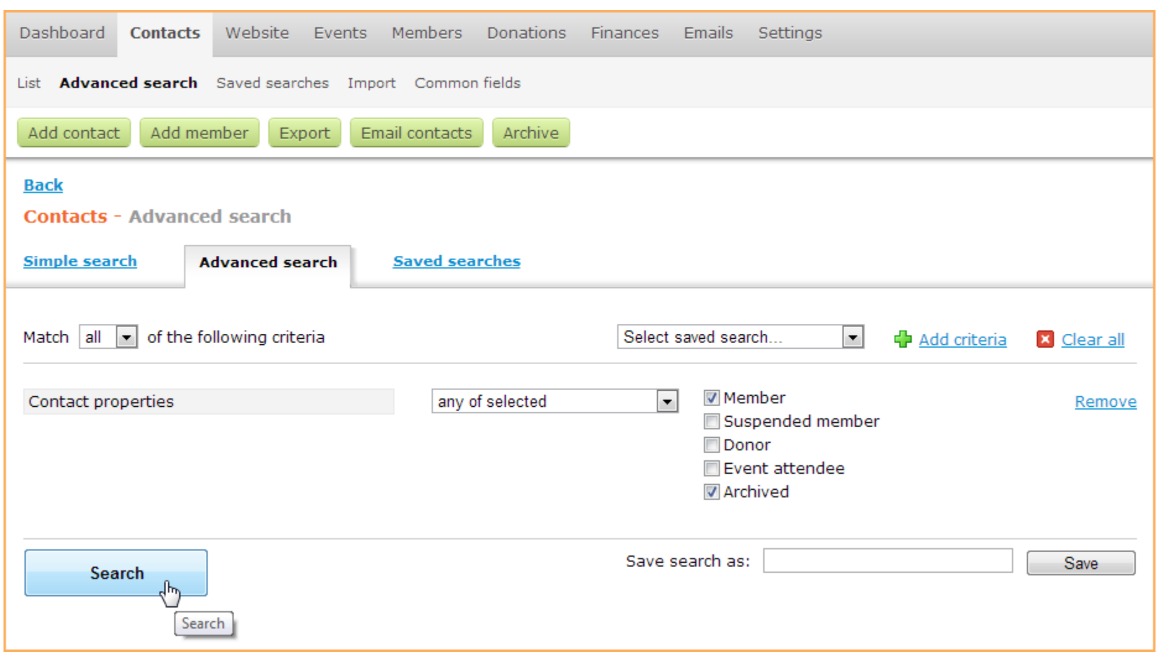
Viewing archived records

Normally, archived records do not appear in your contact list. To view a list of archived records, go to the simple search page in the Contacts module and select the **Archived** filter.

Read more/less



You can also use an advanced search to search for archived contacts. When you add **Contact properties** to your search criteria, you can limit the search to archived contacts, and further limit the search to archived members.

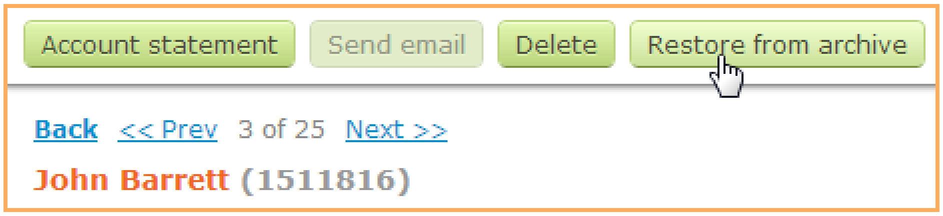


To view the archived record, click it within the search results.

Restoring archived records

Once a contact record has been archived, the **Archive** button on the contact details is replaced by a **Restore from archive** button.

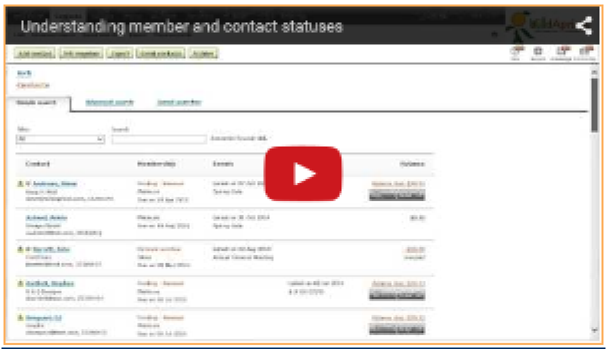
Read more/less



Clicking the **Restore from archive** button will restore the contact record from archived to active status.

You can also restore archived records in bulk using Wild Apricot's exporting and importing functions. Within the spreadsheet, set the **Archived** column to **No**. If you want to restore their membership as well, set the **Membership enabled** column to **Yes**.

Archived contacts are automatically restored when they log in to your Wild Apricot site, register for an event, apply for membership, make a donation, or subscribe to a forum or forum topic. If the contact is a member, their membership level and status will also be restored.



Video: Understanding member and contact statuses (7:30)

On this page:

- Differences between archived and active records
- Viewing archived records
- Restoring archived records

Expand all sections

See also:

- Deleting and archiving member and contact records
- How membership status affects available functionality
- Suspending a membership

Contact list

Contact list

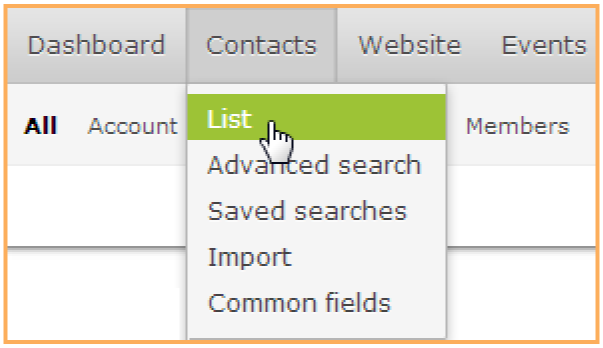
Your Wild Apricot contact database contains information about people or organizations of interest to you and your organization. Information is stored for each contact in a separate record. The contact database includes both members and non-members.

Anyone who makes a donation, registers for an event, or applies to become a member will have a contact record created automatically. You can also add records manually one by one or import them in bulk.

Viewing your contact list

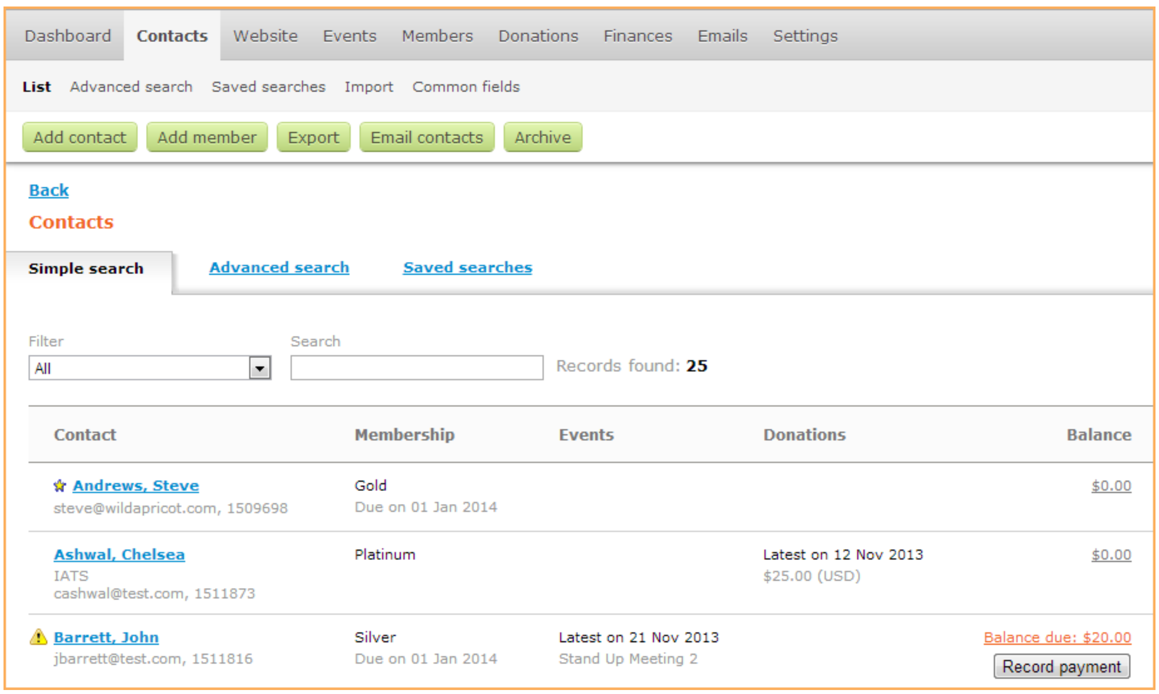
To view the list of your contacts, hover over the **Contacts** menu and select the **List** option.

Read more/less



Your contact list consists of the following pages:

- Simple search
- Advanced search
- Saved searches



Depending on your membership plan, either the **Simple search** or **Advanced search** page will be displayed when you click the **Contacts** menu. On both pages, the following information is displayed for each contact:

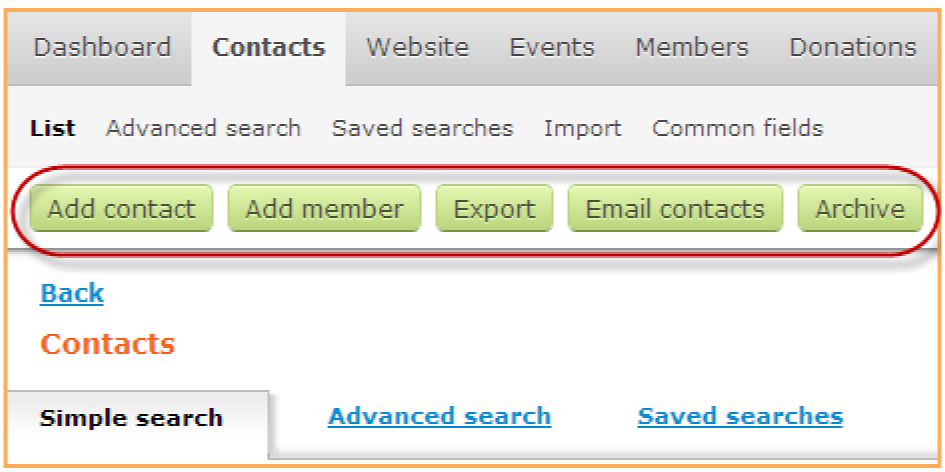
Column	Description
Contact	Name of the contact, the contact's member ID, and the contact's email.
Membership	If the contact is a member, their member level, membership status and renewal date (if applicable). If the membership has been suspended, then this column is marked *Suspended*.
Events	Information for the last event for which the contact registered or joined the waitlist.
Donations	Information for the last donation made by the contact.
Balance	The current balance outstanding for this contact.

Since Wild Apricot gives you the option to identify a contact using either the contact's name, organization name, email, or any combination of these, what appears in the Contact column may vary, as shown below.

For more information, see Organization memberships.

Any contacts that have a pending action, such as a transaction or a renewal, are indicated by a yellow warning icon next to their name.

Using the toolbar buttons at the top, you can add a new contact or a member, export the current list of contacts, send a mass email to the current list, or archive the current list.



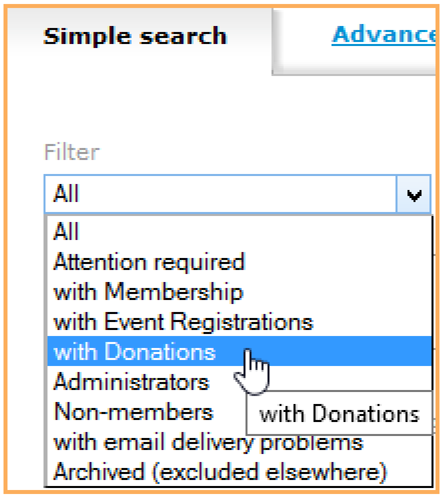
Before emailing, exporting, or archiving, you can filter the list using a simple search, an advanced search, or a saved search.

Simple search page

From the **Simple search** page, you can perform a keyword search or/or use predefined filters to filter the list of contacts.

Filtering the list

To filter your contact list using one of the predefined filters, click the **Filters** drop-down and choose a predefined filter.
Read more/less



You can filter the list to display only those contacts that have memberships, that have made donations or registered for events, or that have experienced email problems. The available filters include:

Filter	Description
All	All non-archived contacts.
Attention required	Contacts that require some action from you. For example, contacts that have applied for membership but their payment. Contacts like these are indicated by a yellow warning icon next to their name.
with Membership	Contacts that have current membership.
with Event Registrations	Contacts with current or past event registrations (including waitlist registrations).
with Donations	Contacts that have made donations.
Administrators	Contacts with administrative access.
Non-members	Contacts who are not members.
with email delivery problems	Contacts to whom an email has recently failed to be sent.
Archived (excluded elsewhere)	Contacts that have been archived. In the search results these contacts will be grayed out to indicate they are not active.

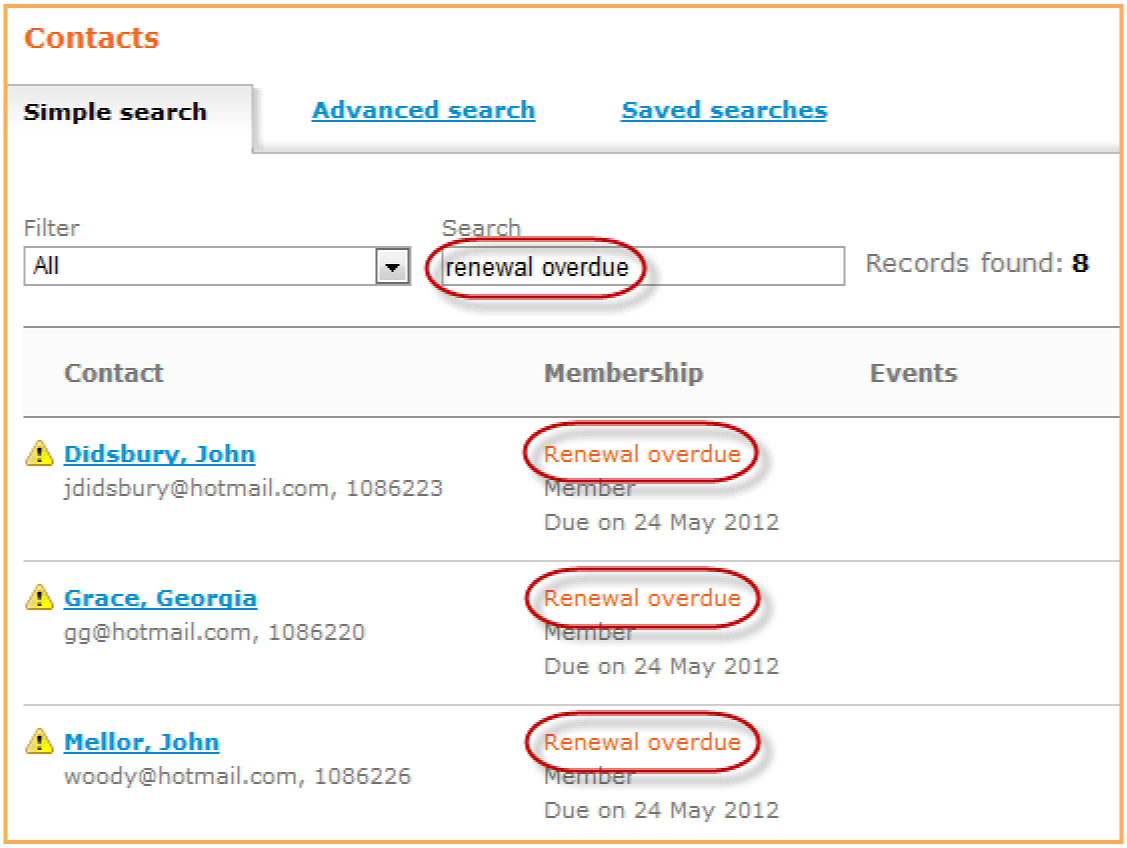
To view a list of contacts with suspended membership, select **All** from the **Filter** drop-down, and then do a keyword search on the word *Suspended*.

Performing a keyword search

You can further filter the contact list by entering a keyword or phrase.

Read more/less

From the **Simple search** screen, just start typing the word or phrase you want to find in the **Search** field. Those records that display the word or phrase you enter will automatically appear in the list.



Archived records are only included in the list if the **Filter** is set to **Archived**.

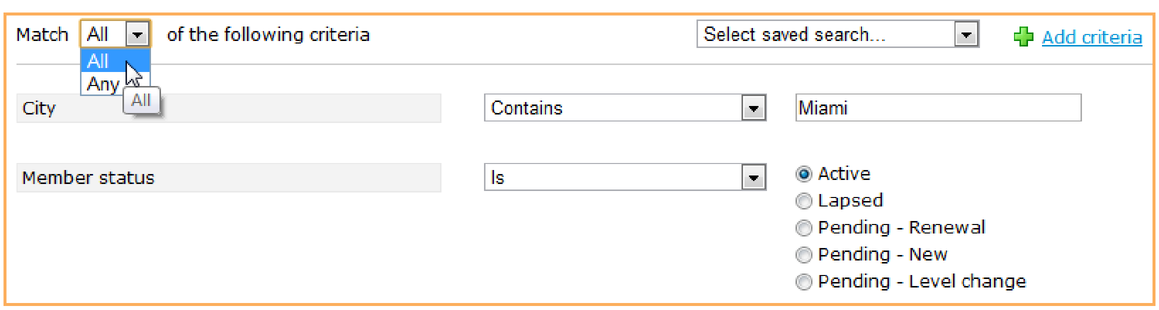
The records are automatically sorted by last name. If the last name is missing, then records will be sorted by first name, then organization, and finally by member ID (aka user ID).

Your entire member list is searched, but only 100 records are displayed at a time; use the **Show** dropdown list to scroll through the results.

Advanced search page

From the **Advanced search** page, you can combine multiple search criteria, and control whether any or all of the criteria needs to be met.

Read more/less



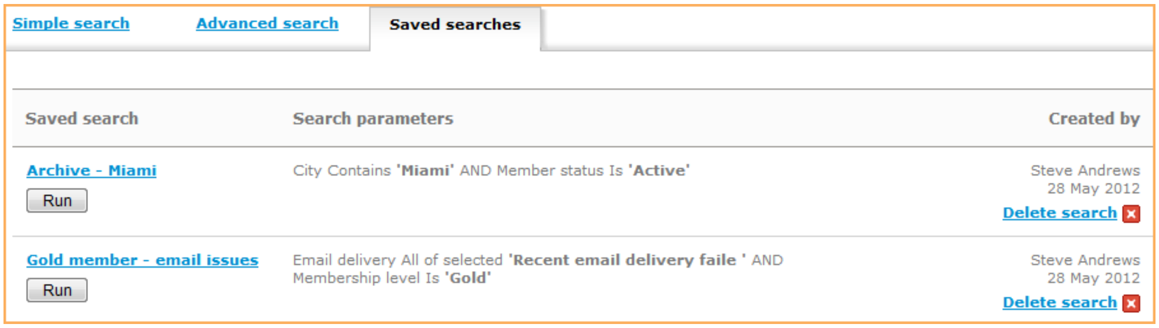
For more information, see Advanced search - Contacts.

Saved searches page

When you perform an advanced search, you can save your search criteria for future use.

Read more/less

Once you save an advanced search, it appears on the **Saved searches** page.



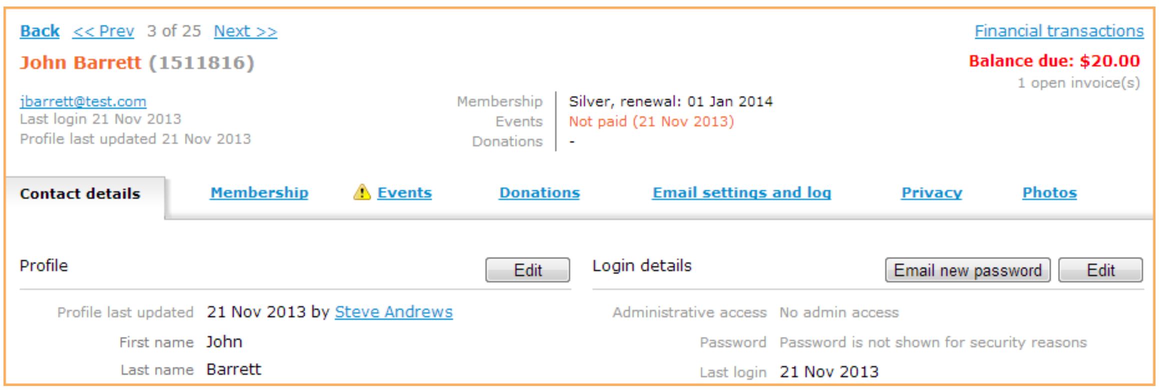
From here, you can run the saved search, view the search criteria, or remove the search from the list of saved searches. For more information, see Saved searches - contacts.

Viewing contact details

To view a contact's details, just click on the contact within the list.

Read more/less

From the Contact details screen, you can view and edit contact information, and use the **Prev** and **Next** button to browse through other contact records in the list.



The **Profile last updated** field indicates the date and time that common fields, membership fields, or member group participation were last updated, either by an administrator, a Wild Apricot support representative, by import, or by the contact themselves – but not by automatic membership renewal. You can use this field in your search criteria when performing an advanced contact search. Initially, this field will be set to a value of *Never*.

> This field was added in version 4.6 on Aug 28, 2013 and was set to *Never* for all existing records. Records last updated before that date will appear to have never been updated.

On this page:

- Viewing your contact list
- Simple search page
  - Filtering the list
  - Performing a keyword search
- Advanced search page
- Saved searches page
- Viewing contact details

Expand all sections

See also:

- Importing members and other contacts
- Adding a new contact manually
- Deleting and archiving member

and contact records
- Viewing and editing contact details
- Customizing database fields
- Searching and filtering contact and member records
- Advanced search - contacts

Merging records

Merging records

You can merge data from two contact records, so that one record with the combined data remains active and the other record is archived.

For example, you may have a contact who signed up as a member with his primary email address, then registered for an event using an alternate email address. You don't want to keep two separate contact records for the same person, so you merge them into one.

As part of the merging process, you select the contact record you want to remain active and the other record to be merged and archived. Wild Apricot does not provide a mechanism to search for possible duplicate records.

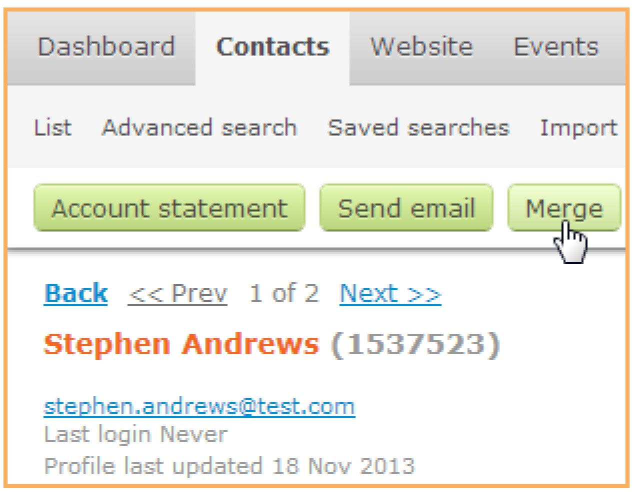
> Before merging records, you should back up your contact database by exporting it to a spreadsheet. You cannot undo the merging of contact records.

Selecting the records to be merged

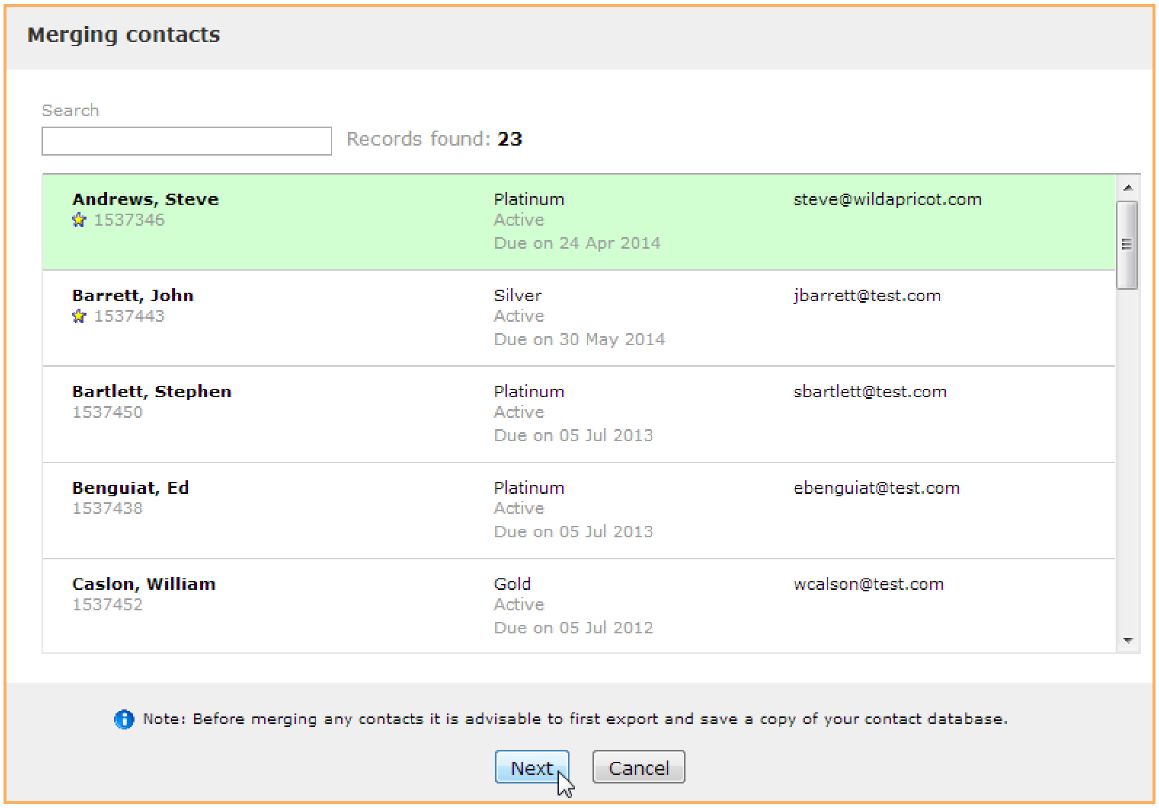
To merge two records, start by going to the **Contacts** module and displaying one of the two contact records – it doesn't matter which.

Read more/less

With the one record open, click the **Merge** button towards the top.

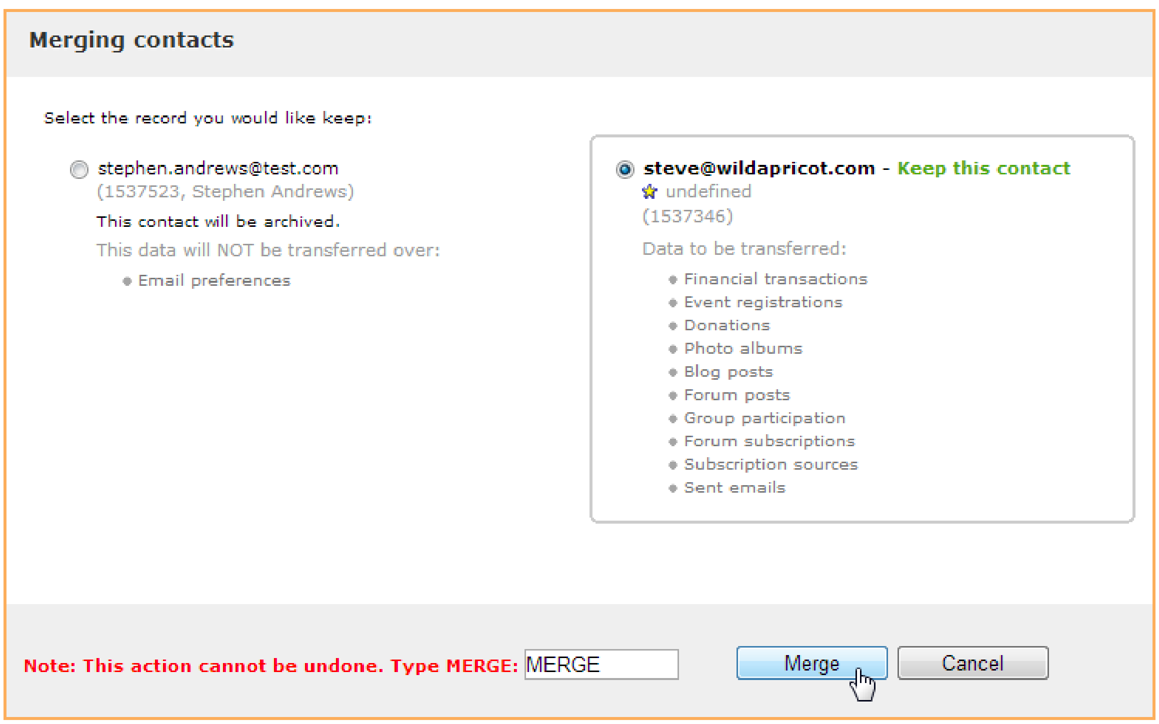


From the window that appears, select the other contact to be merged then click **Next**.

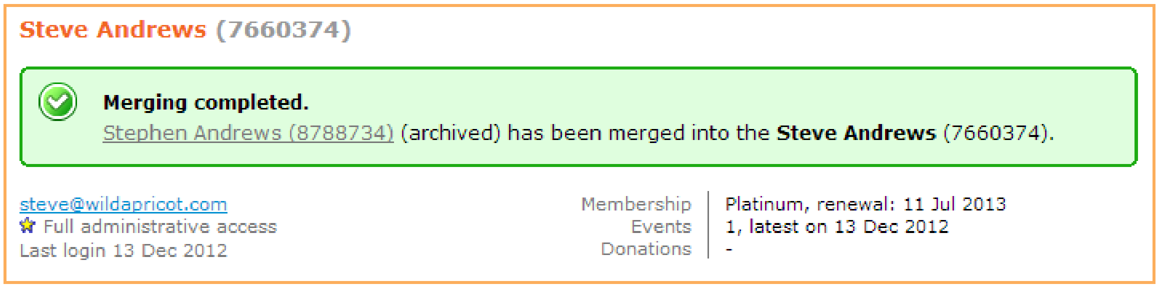


Now, choose which contact record you want to keep active. The other record will be merged into the active record then archived.

After you have selected the record to be kept active, type the word MERGE into the field provided then click the **Merge** button.



Once the records are merged, a confirmation message will appear.



To find the archived record, go to the simple search page within the Contacts module and select the **Archived** filter.

What gets merged

The following information will be copied from the record being archived:

Read more/less

- Event registrations
- Donations
- Photo albums
- Blog posts
- Forum posts
- Group participation
- Forum subscriptions
- Subscription sources
- Sent emails
- Finances
  - Balance
  - Invoices
  - Payments & refunds
  - Audit log
- Membership data, including passwords – when merging a member with a non-member

> If any of this information appears in both records, the information in the record being kept will be retained.

What doesn't get merged

The following information is not copied from the record being archived:

Read more/less

- Member privacy settings
- Email preferences
- Administrative rights
- Membership data – when merging two members

Contacts that cannot be merged

- A bundle administrator with bundle members
- The only full administrator
- Your own contact record
- A member with active recurring payments

On this page:

- Selecting the records to be merged
- What gets merged
- What doesn't get merged
- Contacts that cannot be merged

Expand all sections

Member summary and member list

Member summary and member list

From the Members module, you can view a table summarizing your membership database, or a full list of members that you can filter and search.

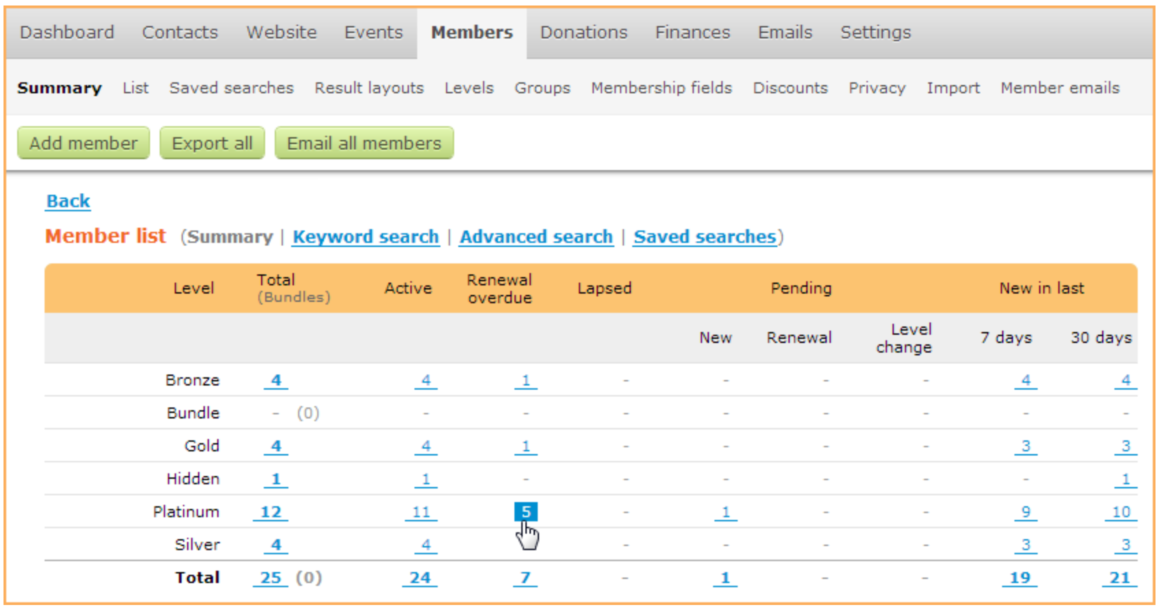
> The member summary and member list does not include contacts who are not members or who have been archived, and does not include suspended members. You can view excluded contacts from the contact list or using an advanced search.

Displaying the member summary

To view the member summary, hover over the **Members** menu and select the **Summary** option.

Read more/less

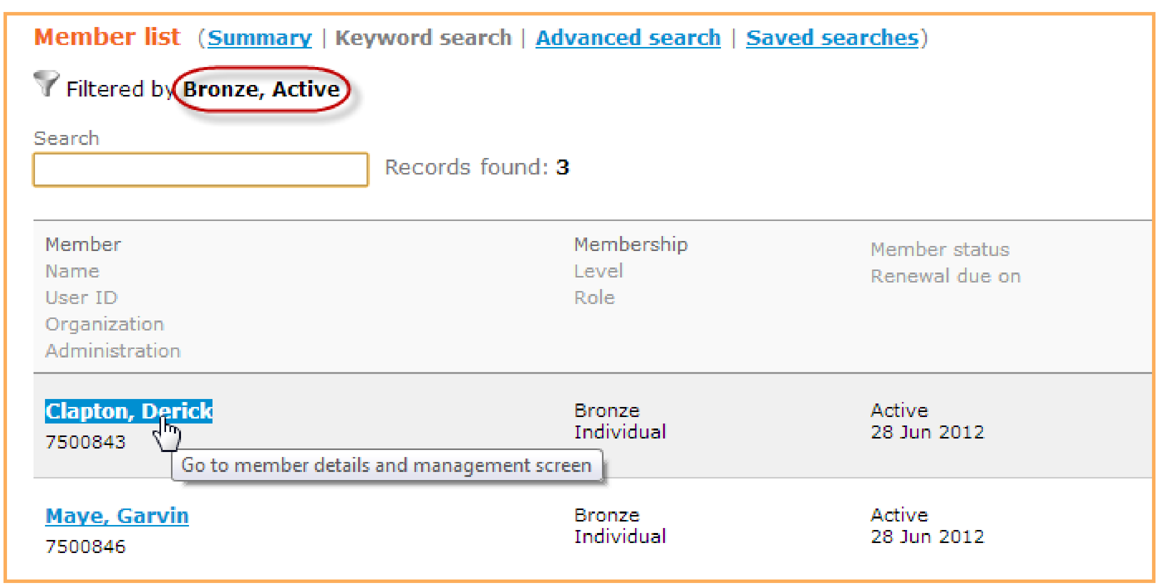
The member summary displays the number of members broken down by membership level and membership status.



The **Total** column is the sum of the **Active**, **Lapsed** and **Pending** columns.

Using the toolbar options, you can add a new member, export the entire member database, or send a mass email to all members in your database.

When you click on a number within the table, a list of members with that membership level and membership status will appear.



Within the list, you can click a member's name to view their membership details.

Displaying the member list

To display the full member list, hover over the **Members** menu and select the **List** option.

Read more/less

On the simple search page that appears, you can filter the list by entering a search keyword.

To perform a more advanced search, using multiple search criteria, click the **Advanced search** link. From the advanced search page, you can assemble your search criteria and save your search for future use.

Using the toolbar options, you can add a new member, export the current member list, send a mass email to the current member list, or archive the current member list.

On this page:

Expand all sections

See also:

- Organization memberships
- Contacts vs members
- Viewing and editing membership details
- Keyword search - Members
- Advanced search - Members

Adding members and other contacts

Adding members and other contacts

Everyone stored in your Wild Apricot database is a contact. A contact may be a member of your organization, but doesn't have to be. Instead, a contact could be a donor or event attendee without necessarily being a member.

There are several different ways you can add contacts to your database.

- Manually add them one at a time
- Import them in bulk from a spreadsheet (see Importing members and other contacts)
- By setting up a membership application form, event registration form, donation form, or subscription form on your Wild Apricot site so that visitors can sign up as members or for events, donations, or email subscriptions and thereby automatically add themselves to your contact database

> If an existing contact completes one of these forms using the email address stored on file for them, another contact record will not be created. Instead, the details of the new transaction will be added to the existing record.

Importing members and other contacts

Importing members and other contacts

If you already have a list of members (or other contacts) in a spreadsheet, you can use it to import them into Wild Apricot. You can also use a spreadsheet to update information for existing clients. For more information, see Bulk changes using import and export .

> Before you import contacts, you should back up your contact database by exporting it to a spreadsheet. You cannot undo the importing of contact records.

For information on importing membership bundles, see Importing bundles.

You can import existing payments and event registrations into your Wild Apricot database using the Wild Apricot API. For more information, see Payments API V2 call and EventRegistrations API V2 call.

Importing members and other contacts involves the following steps:

1. Preparing the import file

The first step in importing contacts using a spreadsheet is to prepare the spreadsheet file.

Read more/less

The spreadsheet file must be in either .xls, .xlsx, .csv, or .xml format, and up to 50 megabytes in size.

If the file consists of multiple sheets, the import process may hang. If successful, only the last sheet in the file will be imported.

The columns in the spreadsheet corresponds to fields in your Wild Apricot database.

	A	B	C	D	F	G
1	**First name**	**Last name**	**e-Mail**	**Membership Level**	**Member since**	**Renewal due**
2	Alvin	Headley	aheadley@test.com	Gold	27-Nov-14	27-Nov-13
3	Augusto	Sandino	sandino@test.com	Platinum	24-Apr-14	5-Jul-14
4	Carly	Rose	crose@test.com	Platinum	18-May-14	2-Jan-14
5	Chelsea	Ashwal	cashwal@test.com	Platinum	30-Sep-13	Never
6	Christine	Hynde	chynde@test.com	Silver	30-Aug-14	2-Jan-14
7	Claude	Garamond	cgaramond@test.com	Platinum	5-Jun-14	5-Jul-13
8	Derick	Clapton	derick@dominos.com	Bronze	23-May-14	28-Jun-14
9	Diego	Riviera	drivera@test.com	Gold	7-Nov-14	Never
10	Ed	Benguiat	ebenguiat@test.com	Platinum	5-Jun-14	5-Jul-13

The spreadsheet must include columns for each field you want to update in your Wild Apricot contact database. The names of the columns – the column headings – are not important since you can map each column in the spreadsheet to fields in your contact database as part of the import process.

You can update only common and membership fields through importing.

There are no required columns when adding contact records through import, though it is a good idea to include one for the email address, since email address is the primary identifier for contacts in Wild Apricot, and is required for contacts to sign in and perform self-service functions.

You don't have to set the passwords yourself when adding members in bulk from a spreadsheet. Instead, following the import, you can send the new members an email blast including the {Contact_Password_Reset_URL} macro, which will appear as a link they can click on to set their own passwords.

To update existing contact records, you must include values for existing contacts in the columns that map to the **User ID** or **Email** fields in your Wild Apricot contact database. Where possible, use User ID since it uniquely identifies each contact.

To create a new contact, enter an email address in the **Email** column that is not currently in your contact database. For new records, any value entered in the User ID column will be ignored since user IDs are automatically generated by the system.

If you are importing members, include a **Membership level** column and enter the appropriate level for each member. You can assign contacts to existing membership levels, or enter a new level name to create a level for them. Optionally, you can also set values for the **Member since** and **Renewal due** columns. If you don't include columns for these fields, the **Member since** value will be set to the import date, and the **Renewal due** value will be set according to the renewal settings for the membership level. The **Membership enabled** column will be automatically set to *Yes* , and the **Membership status** will be automatically set to *Active* when you specify a membership level value. However, for best results when importing members, you should include a **Membership enabled** column and set the values for all members to *Yes*. If you are importing lapsed members, be sure to set the **Membership status** column to *Lapsed* .

To summarize:

What are you trying to do?	Required column(s)	Recommended/optional columns
Add a contact	None	Email
Add a member	Membership level	Membership enabled (set to Yes), Member since, Renewal due, Membership status
Update existing contact/member	User ID or Email	whichever ones you want to update

For many system fields, you are restricted to certain values, or to values that use a certain format. The valid values and formats for system fields are listed in the Import field guide.

⚠ You cannot import calculated values – cells that uses formulas rather than actual values. Only actual values can be imported.

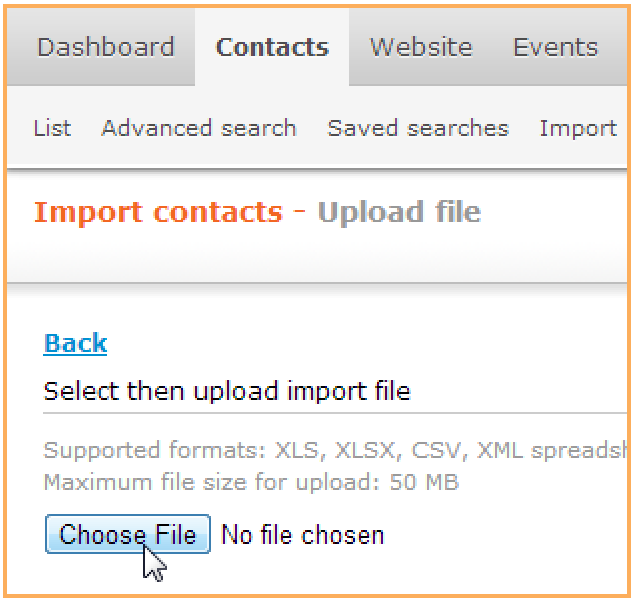
If you want to remove a value – leaving it blank rather than replacing it with another value – enter **NEVER** for system date fields (like Renewal date), and **CLEAR** for custom fields and for the Group participation and Notes system fields.

2. Uploading the import file

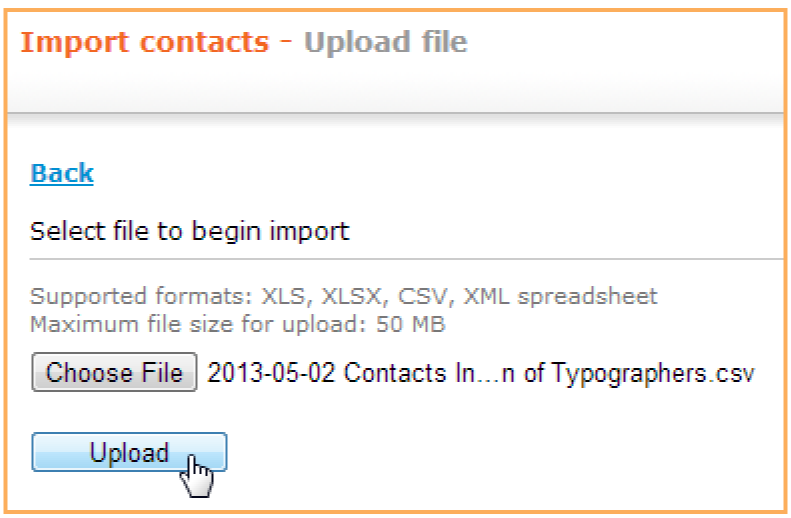
Once you've prepared the spreadsheet containing the contacts to be imported, you can upload the import file to your Wild Apricot account.
Read more/less

To upload your import file, follow these steps:

1. Hover over the **Contacts** menu and select the **Import** option.
2. Click the **Choose file** or **Browse** button (depending on your browser).



3. Select the import file on your computer or network then click the **Open** button. The file must be in either .xls, .xlsx, .csv, or .xml format, and up to 50 megabytes in size.
4. Click the **Upload** button.



Wild Apricot will now upload and analyze the import file. So that Wild Apricot can process the file properly, you will be prompted to provide some information about the import file.

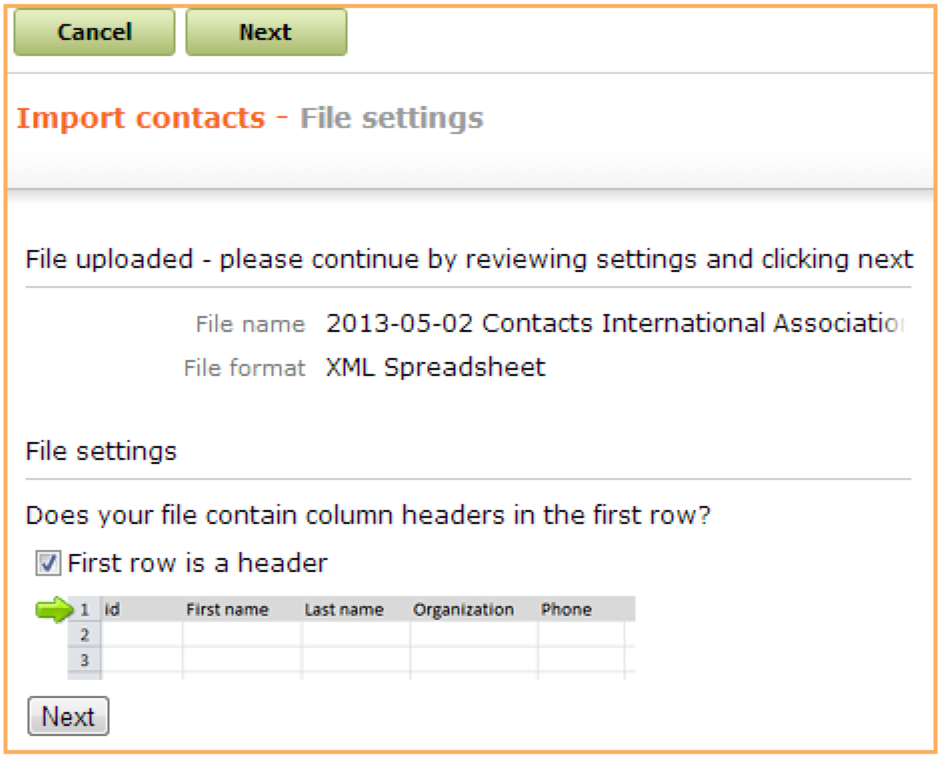
3. Changing import file settings

The next step in Wild Apricot's import wizard is reviewing and adjusting the import file settings.

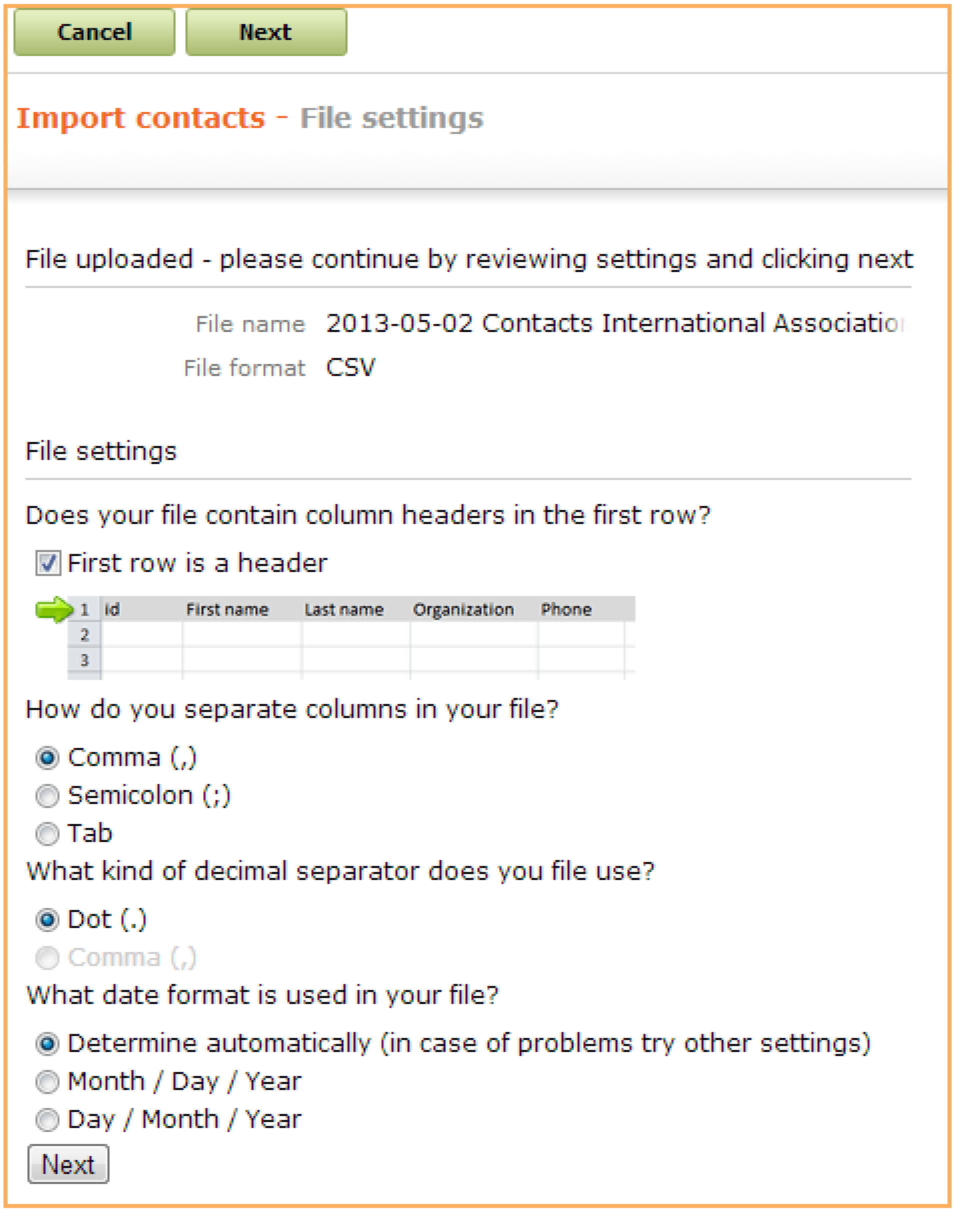
Read more/less

On the **File settings** screen, you provide details about the structure and format of your import file.

If your import file is in .xml, .xls, or .xlsx format, you will be asked to provide the following information.



If you have uploaded a .csv file, you will be asked to provide the following information.



These settings are described in detail below.

Setting	Description
Header row	Check **First row is a header** if the first row in the spreadsheet consists of column headings.
Column separator	Indicate whether values in the import file are separated by commas, semicolons, or tabs.
Decimal separator	Indicate whether decimal places are indicated by a dot or a comma.
Date format	Select the date format used for date fields.

⚠ If you do not select the correct column separator used by your import file, your contacts will not be imported properly.

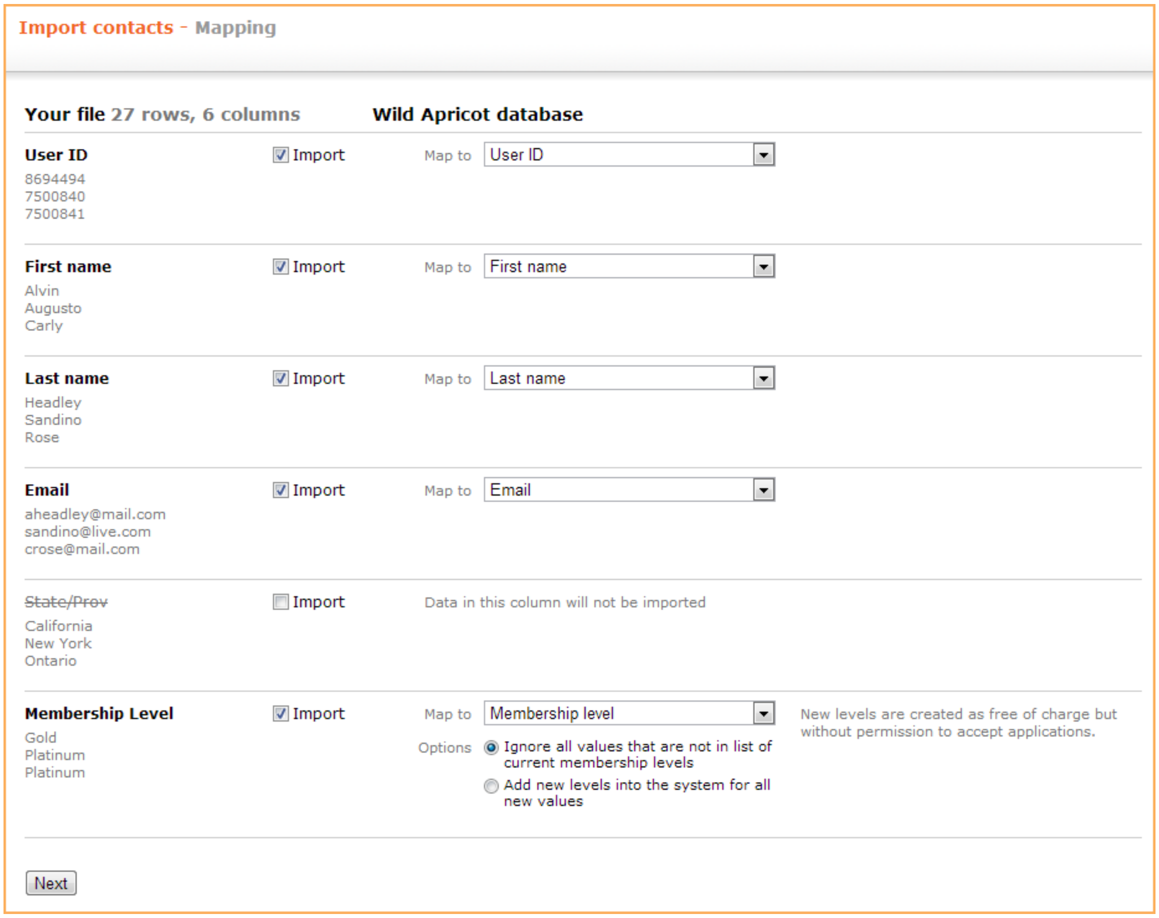
After you have reviewed and adjusted the import file settings, click the **Next** button to continue.

4. Mapping import columns to database fields

At this stage in the import process, you map (i.e. link) columns in your spreadsheet to fields in your Wild Apricot database.

Read more/less

On the mapping screen, each column in your import file is listed, along with the values for the first 3 records in the file. If your import file included a header row, then the column headings from your file will be used to identify the column. Otherwise, default column names will be displayed.

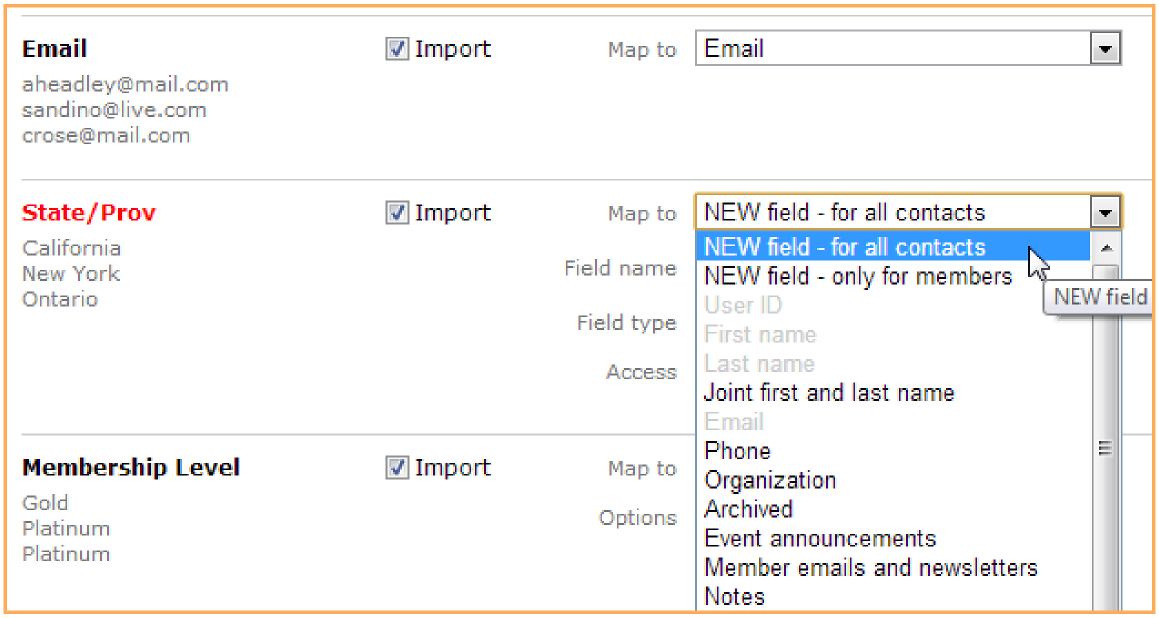


For each column that you want to import into your Wild Apricot database, make sure that **Import** checkbox is checked. If the **Import** chec kbox is unchecked, the column name will appear crossed out, and the column values will not be imported.

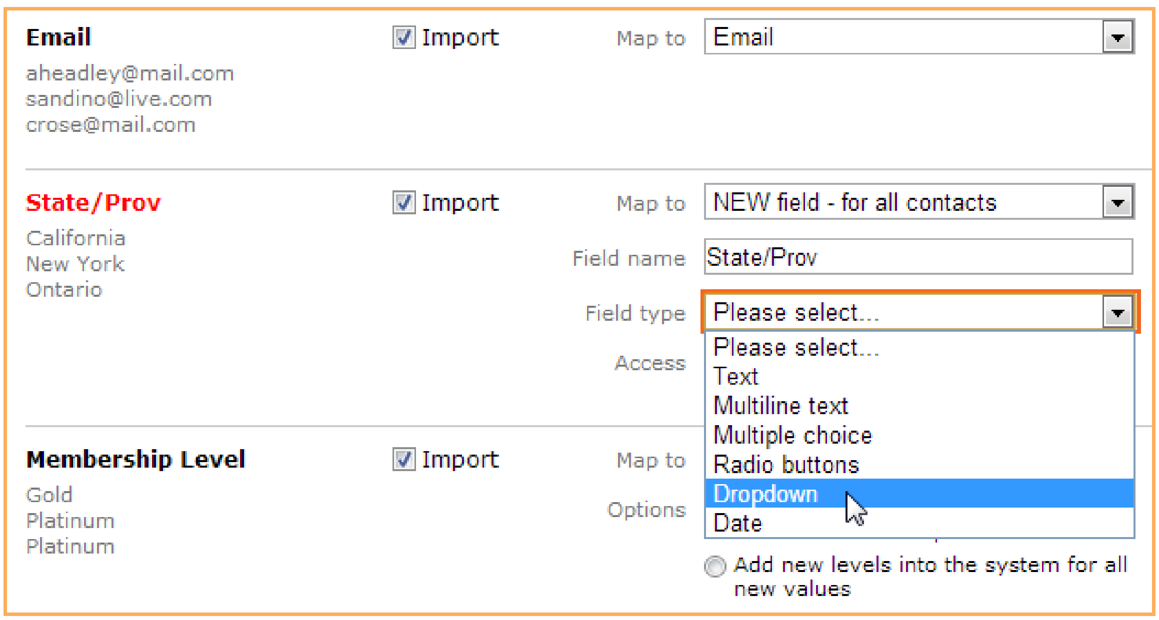
> If you're updating existing contacts, make sure you leave User ID or Email checked – whichever you are using to identify the contact.

Within the **Map to** drop-down list, you select the field in your Wild Apricot contact database into which the values for this column will be copied. For example, if you have an Email Address column in your spreadsheet, you'd select **Email** from the **Map to** list, so that your Email Address column values end up in the Email field in your Wild Apricot database. Columns will be automatically mapped if they use the same name as a field in your contact database. Columns that you have chosen to import but haven't mapped to a database field will be displayed in red.

If you want to use a column's values to populate a new field in your Wild Apricot database, select the **NEW field - for all contacts** to add the field as a common field, or **NEW field - only for members** to add the field as a membership field.



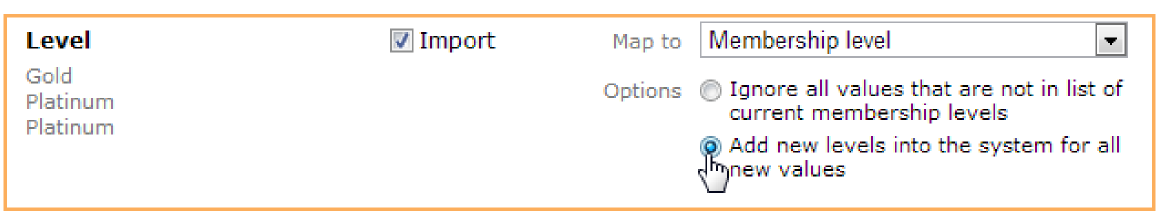
For new fields, you must also select a field type.



You cannot change the field type after you have performed the import.

You can also indicate whether the new field should be for internal use only.

When you map a column to a multi-option field in your contact database – such as membership level or any multiple choice, radio buttons, or dropdown field – you can indicate whether new field values found in the spreadsheet should be ignored or used to create new field options.



For example, if your import file includes a Platinum membership level but your Wild Apricot database does not, you can click the **Add new levels into the system for all new values** radio button to automatically add the Platinum membership level to your Wild Apricot database.

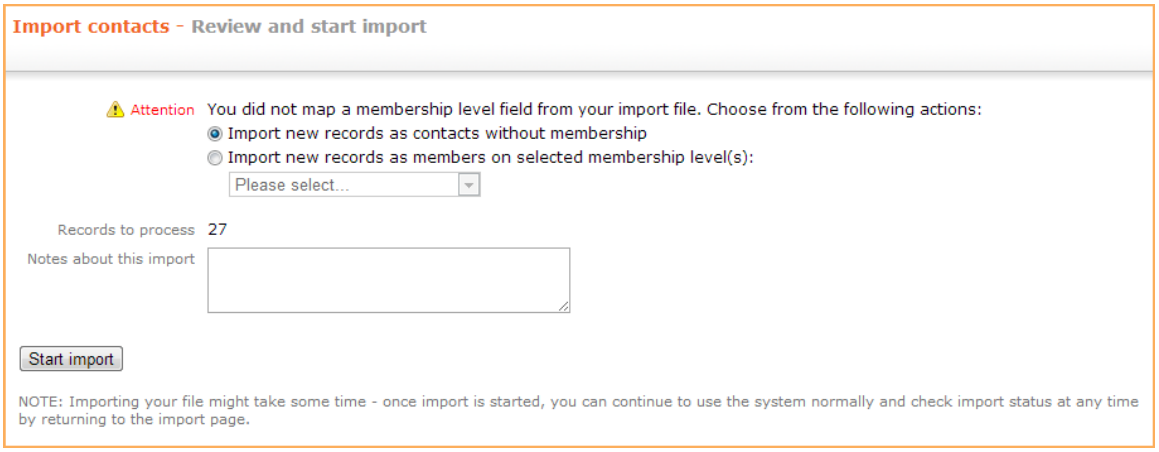
After you have finished mapping import columns, click the **Next** button to continue. An error message will appear if completing the import would result in you exceeding your plan's contacts limit.

5. Processing the import file

The final step in the import process is to start processing your import file.

Read more/less

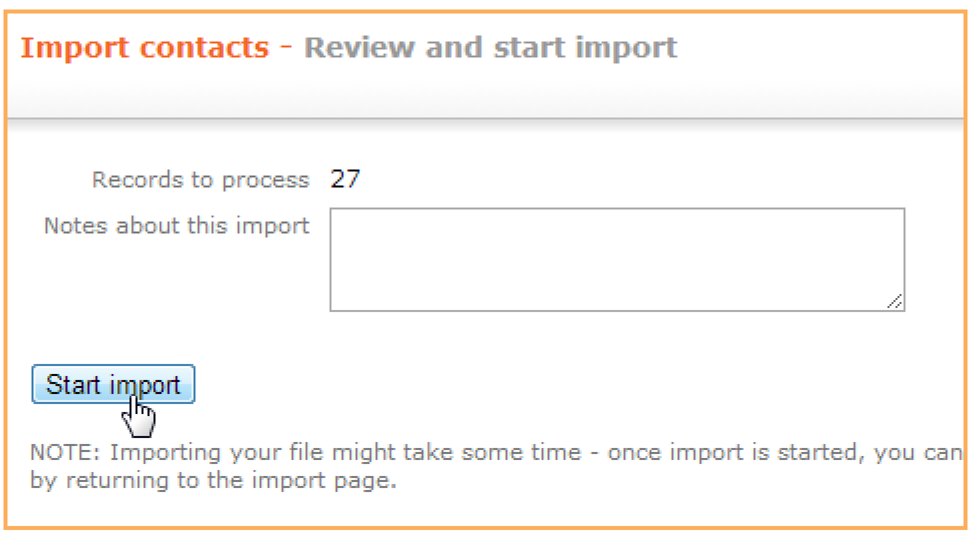
If you did not map a column to the membership level field, the system will present you with the following options:



You can import all new records as non-member contacts, or as members assigned to one selected membership level. Existing records will be unaffected by your choice.

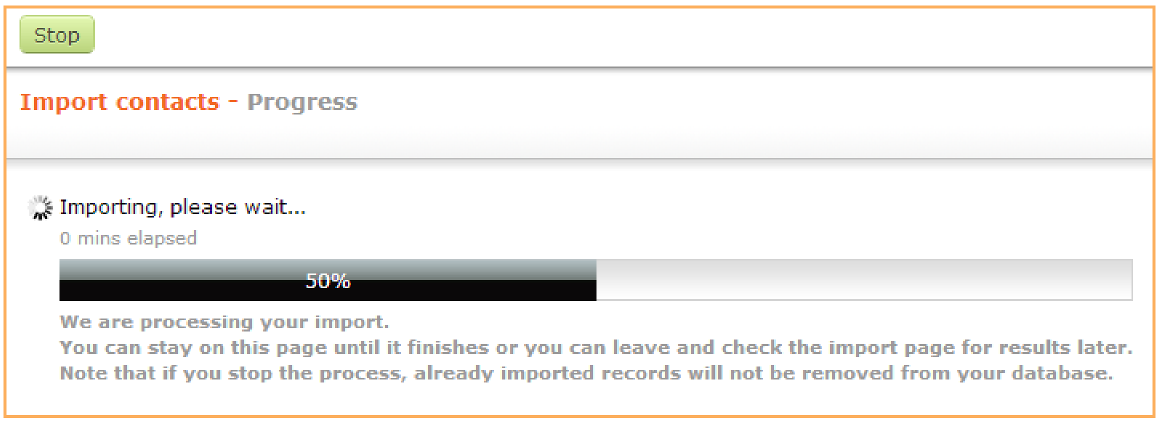
> If you are importing only non-member contacts, you do not need to map a column to the membership level database field.

If you did map a column to the membership level field, the following screen will appear instead.



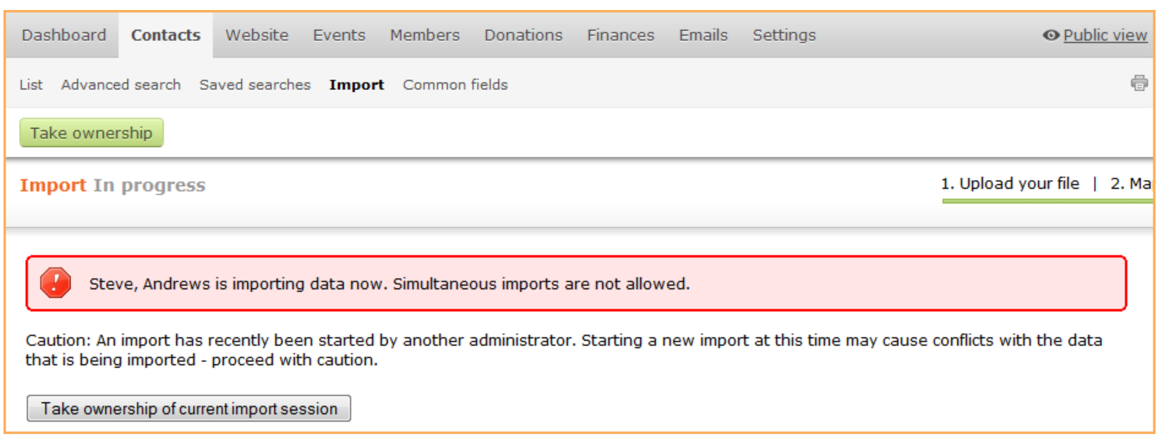
From either screen, you can begin importing records from your spreadsheet by clicking the **Start import** button. To help you remember the reason for each import, be sure to enter notes in the field provided before starting the import process.

Once the import process has started, a progress bar will appear.



You can cancel the import before it is finished by clicking the **Cancel** button. This will prevent any records not yet imported from being imported, but any records already imported will still be added to your contact database.

If another administrator is already in the process of importing records into your contact database, the following warning message will appear.



Simultaneous updates are not allowed since they can cause data conflicts. You can click the **Take ownership** button to take over the transfer currently in progress. If you click this button, the import initiated by the other administrator appear on your screen, and the message about simultaneous imports will be displayed to the other administrator.

Import logic

During the import, Wild Apricot applies the following logic to determine whether to update existing records or create new ones.

1. For each import record, Wild Apricot checks if an existing User ID is specified. If so, the corresponding record is updated with the data from the import file.

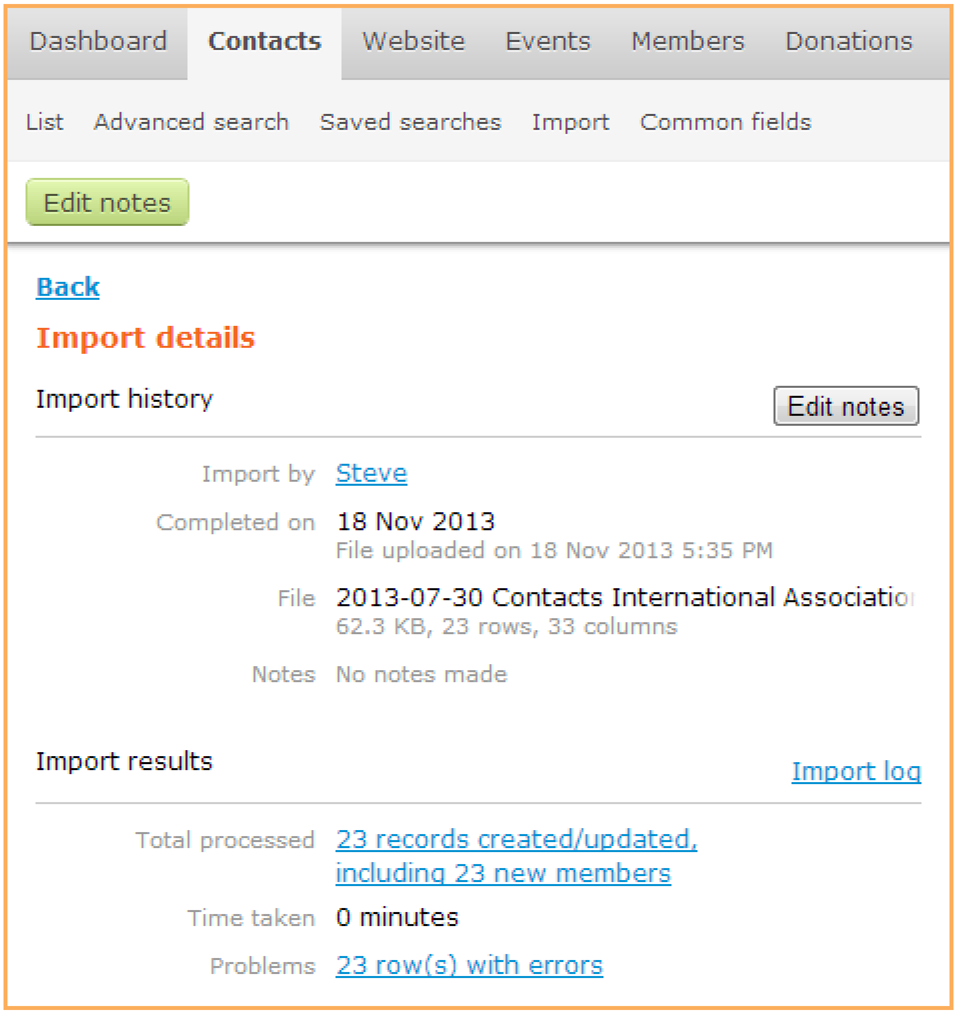
2. If no existing User ID is specified, then the system checks if the specified email address exists. If so, the corresponding record is updated.
3. If no existing User ID or email address is specified, then a new contact record is created and assigned a system generated User ID.

Reviewing the imported records

After you've imported contact records, you can review the imported records and view your import history.

Read more/less

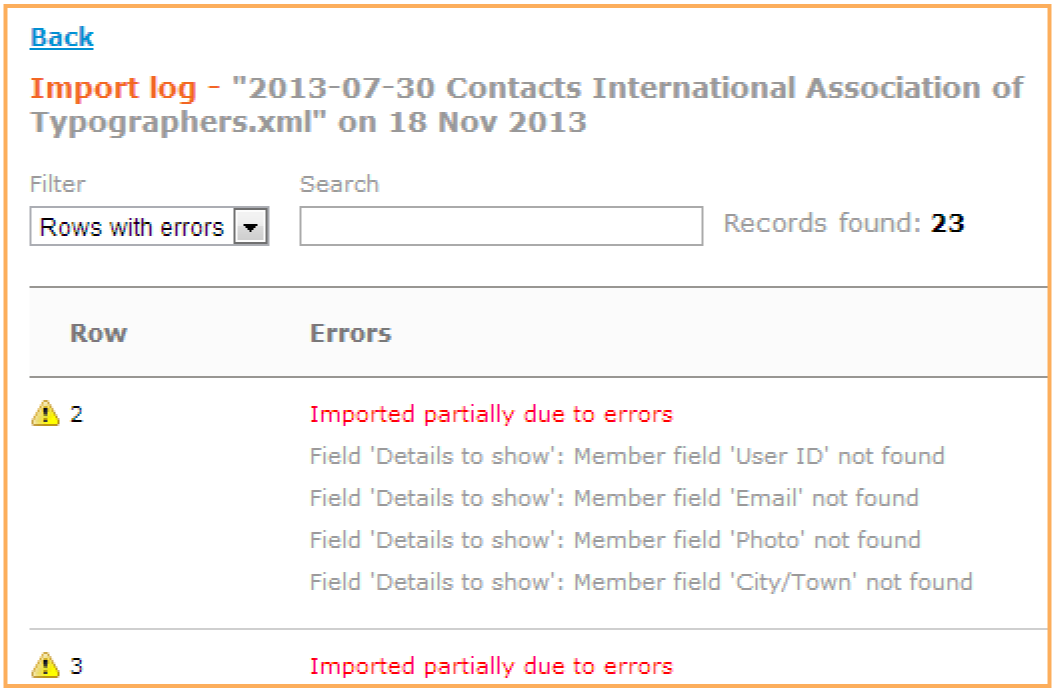
Once the import is finished, a detailed summary of the import will appear.



The import details includes:

- the name of the administrator who performed the import
- the date and time of the import
- the name of the import file
- any notes entered for the import
- the number of records created or update
- the number of new members
- how long the import took to complete
- the number of import errors

If there were any problems with the import, the number of errors will appear as a link beside the **Problems** heading. Clicking this link will display the list of errors within the import log.



The details of the error will be displayed beside the number of the row in the spreadsheet that produced the error.

To view the status of all rows within the import spreadsheet – not just the ones with errors – click the **Filter** drop-down and select **All rows**.

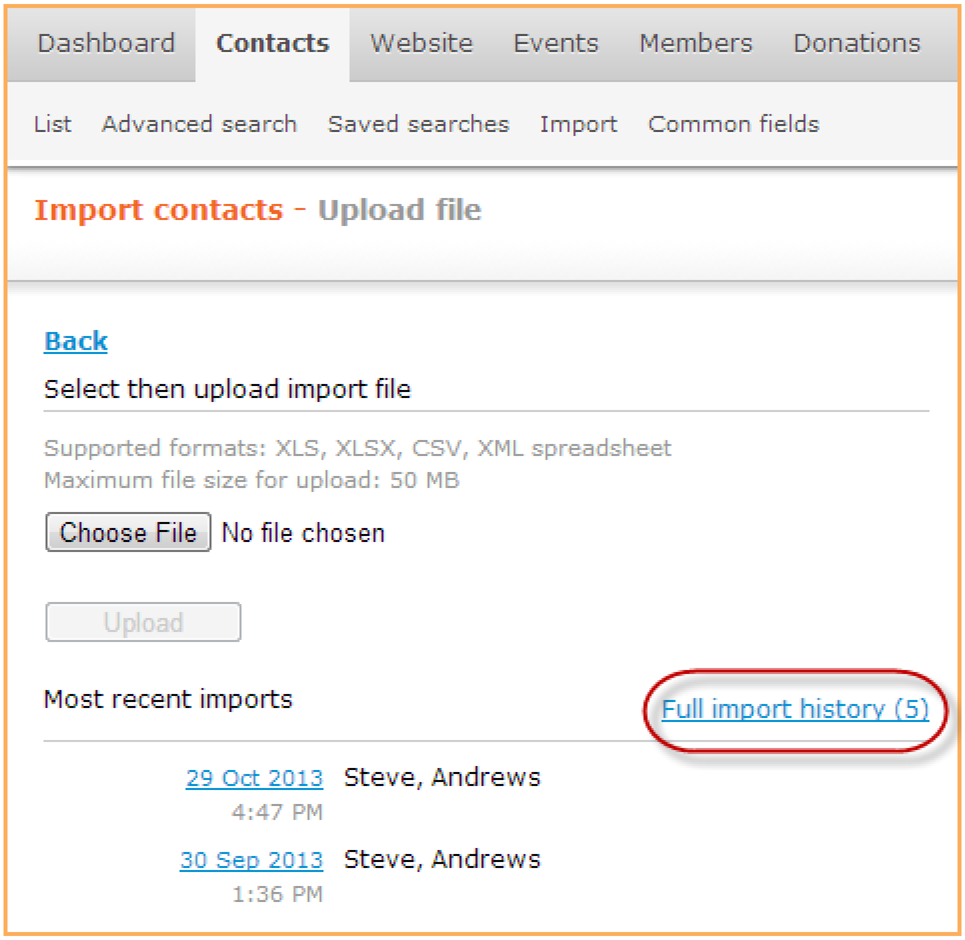
You can also access the import log by clicking the **Import log** link within the import details.

Viewing your import history

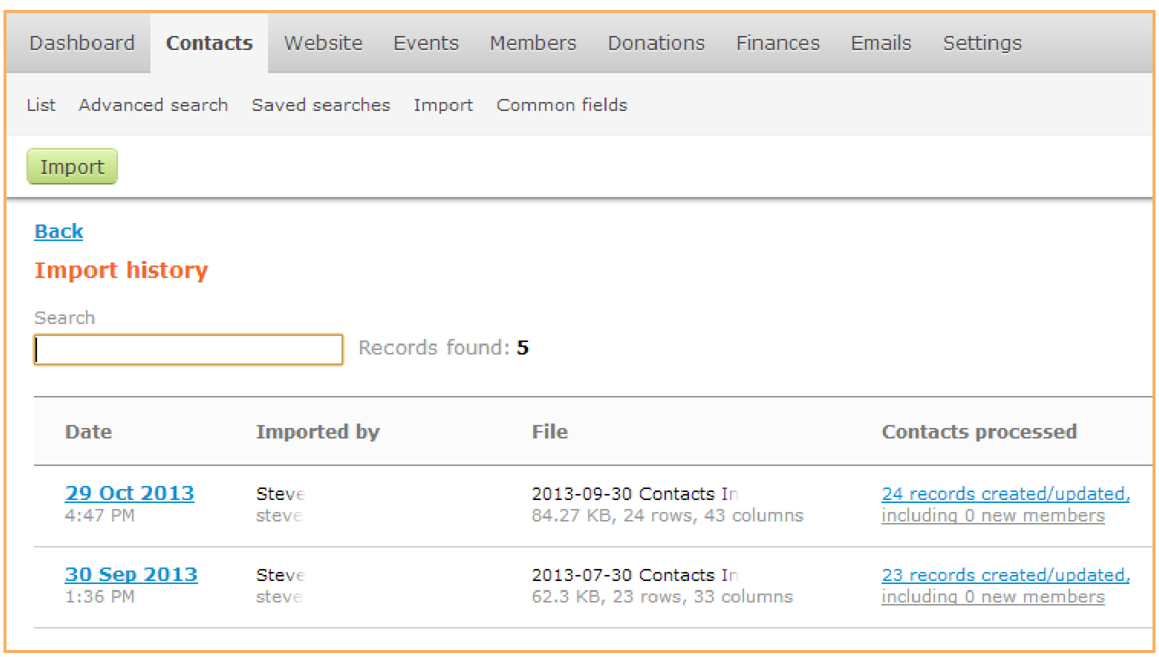
To review the status of previous imports, follow these steps:

Read more/less

1. Hover over the **Contacts** menu and select the **Import** option.
2. Click the date of a recent import or click **Full import history** for a complete import list.



3. From the full import history list, you can click the date of an import to view its details, or enter a search string to filter the list.



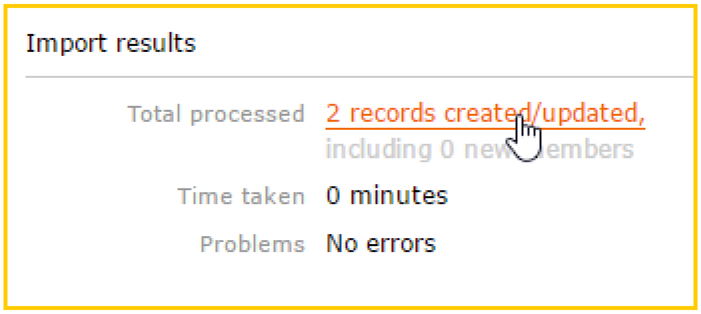
Emailing the password link to imported contacts

When you add new contacts or members through importing, they will **not** receive a welcome email with their login credentials. You have to manually email them with a password reset link.

To email the imported contacts, follow these steps:

Read more/less

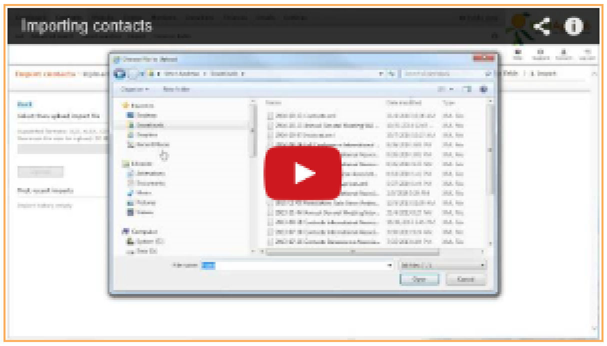
1. Click the number of records created/updated within the import results.



(The import results appear automatically after the import is finished, and can be viewed from your import history by hovering over the **Contacts** menu and selecting the **Import** option.)
2. Click the **Email contacts** button.
3. Select the template you want to use as the basis for your email.
4. Within the body of your email message, let your new members know about your site and their membership, and include the {Contact_Password_Reset_URL} which displays a password reset link. A sample welcome message appears below:

```
Hi {Contact_First_Name},

Welcome to the new association website! You have been added as a member.

You can use your email address to log in to your member profile:

{Contact_Email}

If this is your first time logging in, please use the following link to
reset your password:

{Contact_Password_Reset_URL}

An email will be sent to you to reset your password.

Once you've logged in, you will be prompted to accept the terms and
conditions.

Then, you can go into your profile and update and verify your contact
information.

Let's make this association something special!

The Association Team
```

5. Review your message and send it to your new members.



Importing contacts (5:57)

On this page:

- 1. Preparing the import file
- 2. Uploading the import file
- 3. Changing import file settings
- 4. Mapping import columns to database fields
- 5. Processing the import file
- Reviewing the imported records
- Viewing your import history
- Emailing the password link to imported contacts

Expand all sections

See also:

- Bulk changes using import and export
- Importing bundles
- Import field guide
- Merging records
- Contacts vs members

Importing members from MemberClicks

Importing members from MemberClicks

You can export your membership data from MemberClicks then import it into Wild Apricot. Importing members from MemberClicks into Wild Apricot involves the following steps:

1. Export your MemberClicks database

From MemberClicks, export your membership database to a .CSV spreadsheet file.

2. Adjust the spreadsheet

After exporting your MemberClicks membership database to a spreadsheet, you need to rename the columns in the spreadsheet as shown below.

From...	To...
Group	Membership level
Company	Organization
Phone Number	Phone
Membership Expiration Date	Renewal due

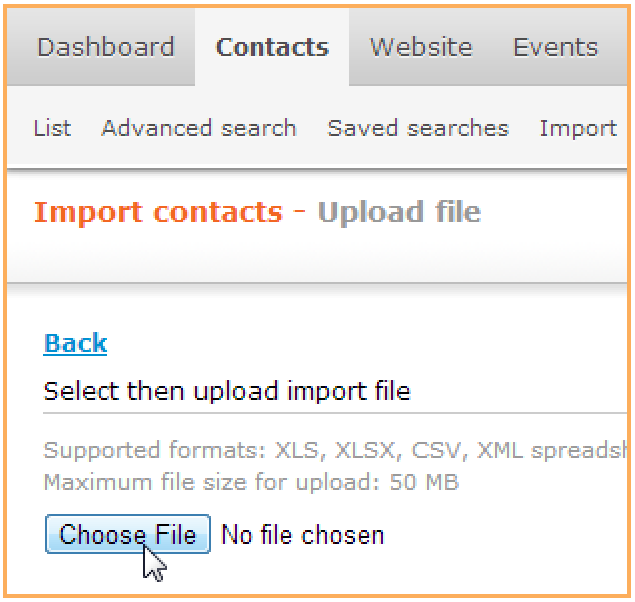
You don't have to set the passwords yourself when adding members in bulk from a spreadsheet. Instead, following the import, you can send the new members an email blast including the {Contact_Password_Reset_URL} macro, which will appear as a link they can click on to set their own passwords.

3. Upload the spreadsheet file

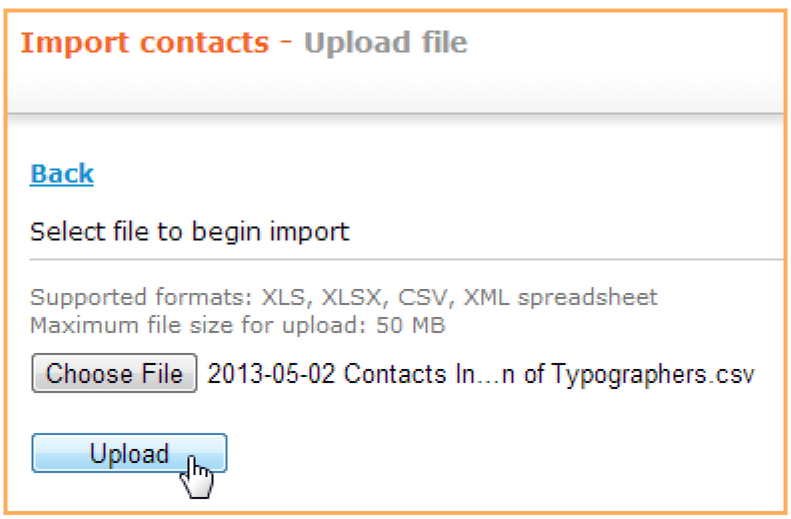
Once you've adjusted the spreadsheet containing your MemberClicks membership data, you upload the spreadsheet file to your Wild Apricot account.

To upload your spreadsheet file, follow these steps:

1. Hover over the **Contacts** menu and select the **Import** option.
2. Click the **Choose file** or **Browse** button (depending on your browser).



3. Select the import file on your computer or network then click the **Open** button.
4. Click the **Upload** button.



Wild Apricot will now upload and analyze the spreadsheet file.

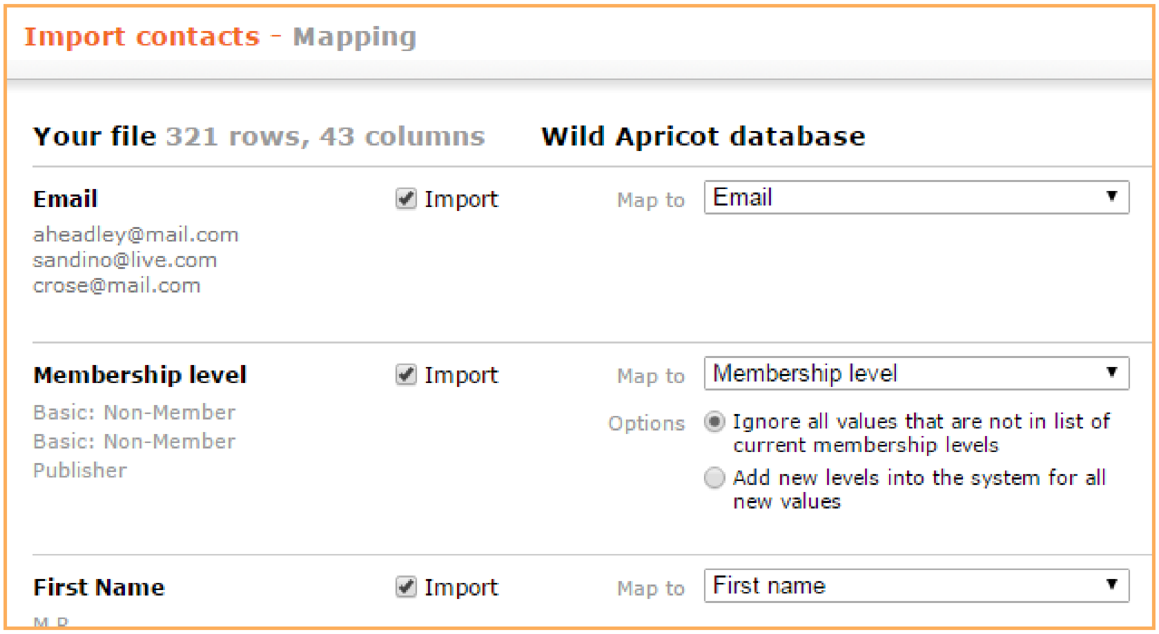
4. Review import file settings

The next step in Wild Apricot's import wizard is reviewing and adjusting the import file settings. Normally, you would leave these settings alone and just click the **Next** button to continue.

5. Confirm the mapping of spreadsheet columns to database fields

At this stage in the import process, you confirm that the columns in your spreadsheet are mapping to the correct fields in your Wild Apricot database.

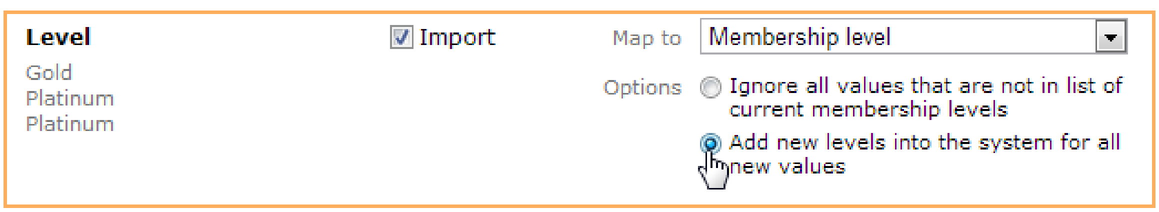
On the mapping screen, each column in your import file is listed, along with the values for the first 3 records in the file.



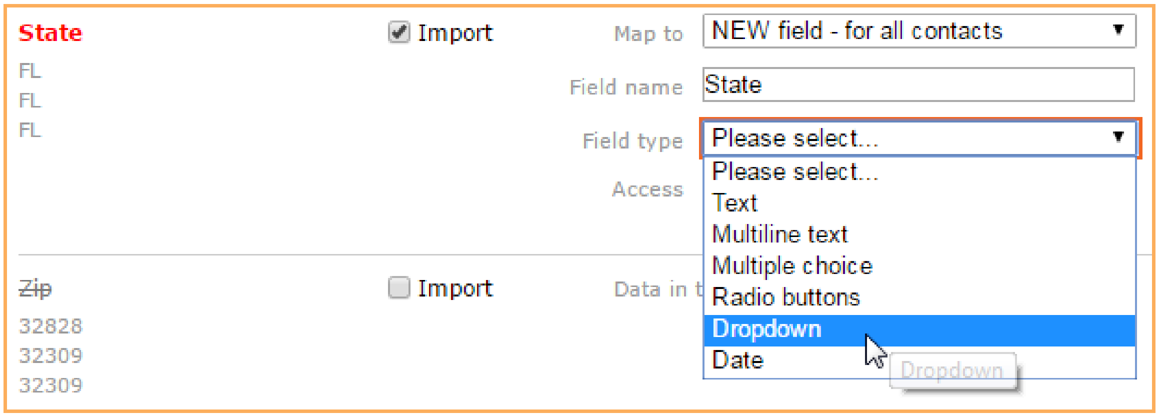
For each column that you want to import into your Wild Apricot database, make sure that **Import** checkbox is checked. If the **Import** checkbox is unchecked, the column name will appear crossed out, and the column values will not be imported.

Within each **Map to** drop-down list, make sure that your spreadsheet columns are mapping to the corresponding field in your Wild Apricot contact database. Columns will be automatically mapped if they use the same name as a field in your contact database. Columns that you have chosen to import but haven't mapped to a database field will be displayed in red. To map a column to a field, select a value in the **Map to** drop-down list.

For **Membership level**, enable the option to create new field values found in the spreadsheet.



For fields that you want to import other than Email, Membership level, Organization, Phone, Renewal date, and Notes, select the **NEW field - for all contacts** to add the field as a common field (to apply to all contacts including non-members) or **NEW field - only for members** to add the field as a member-only field. For new fields, you must also select a field type.



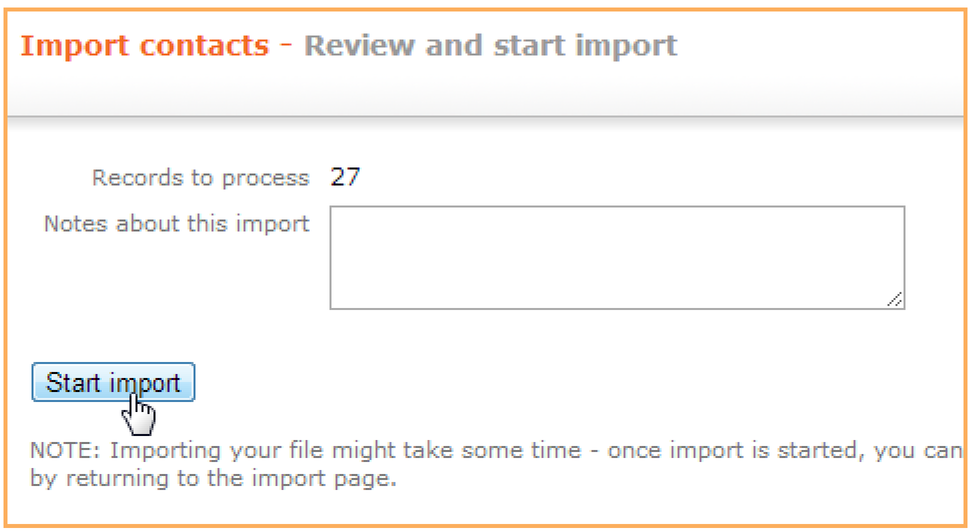
⚠ You cannot change the field type after you have performed the import.

You can also indicate whether the new field should be for internal use only.

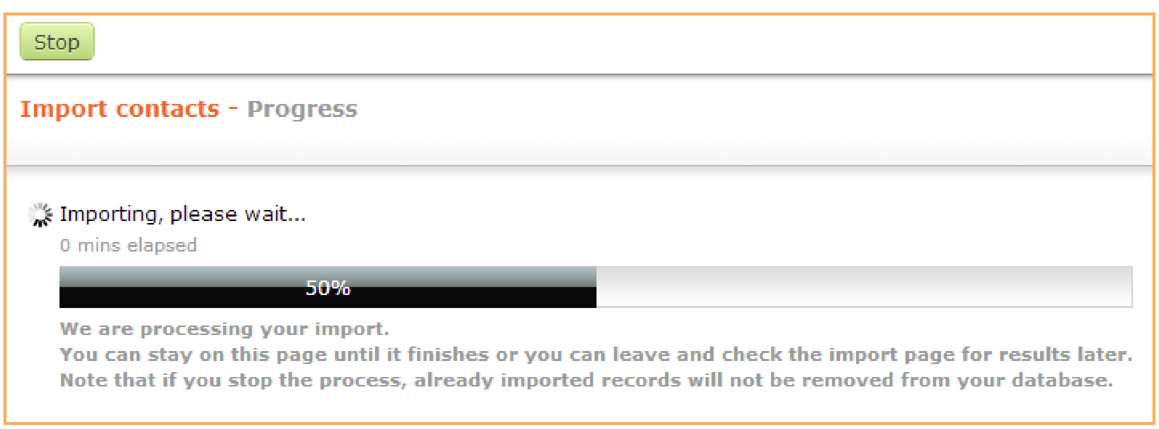
After you have finished mapping columns to fields, click the **Next** button to continue.

6. Process the import file

The final step in the import process is to process your import file. From the screen that appears, click the **Start import** button.



Once the import process has started, a progress bar will appear.



If you have other tasks to work on, you can leave this screen safely and the import will continue in the background. To review the progress of the import later, return to the Import screen within the Contacts module.

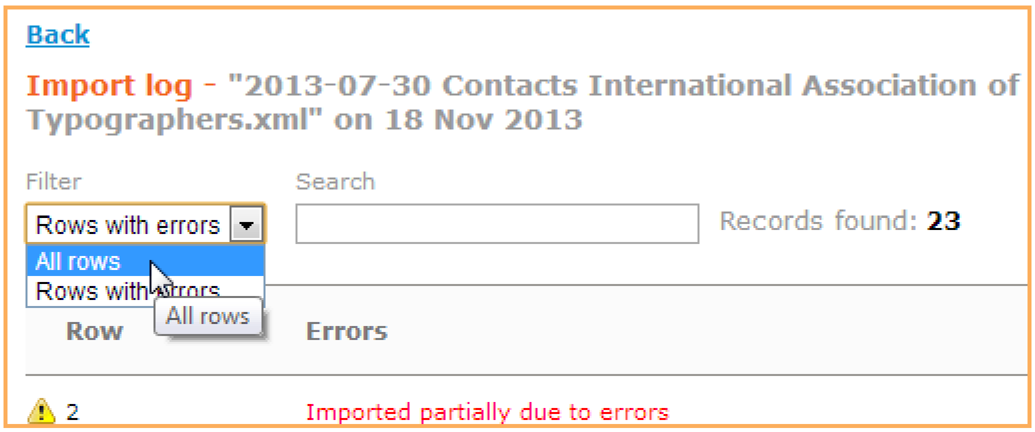
7. Review the imported records

Once the import is finished, a detailed summary of the import will appear. The import details include:

- the name of the administrator who performed the import
- the date and time of the import
- the name of the import file
- any notes entered for the import
- the number of records created or update
- the number of new members
- how long the import took to complete
- the number of import errors

If there were any problems with the import, the number of errors will appear as a link beside the **Problems** heading. Clicking this link will display the list of errors within the import log. The details of the error will be displayed beside the number of the row in the spreadsheet that produced the error.

To view the status of all rows within the import spreadsheet – not just the ones with errors – click the **Filter** drop-down and select **All rows**.



You can also access the import log by clicking the **Import log** link within the import details.

On this page:

See also:

- Bulk changes using import and export
- Importing bundles
- Import field guide
- Merging records

Importing bundles

Importing bundles

A membership bundle is a group of members who are linked together and managed by one of their members – the bundle administrator. You can create membership bundles and add members to them via import. For instructions on creating membership bundles and adding members to them manually, see Membership bundles.

Preparing the import file

To prepare your import file, you need to know the following:

- The name of the bundle membership level (unless you plan to create a new one via import)
- The email address of the contact you want to be the bundle administrator (or user ID if already in your contact database)

Through import, you can create multiple membership bundles using one or more bundle membership levels.

Creating new bundles

To create a new membership bundle, set the **Membership level** field of the contact you want to be a bundle administrator to the appropriate bundle level.

Read more/less

For each contact to which you assign a bundle membership level, a separate membership bundle will be created. The contact assigned to the bundle membership level automatically becomes the bundle administrator.

In the following example, 5 separate bundles are created using 2 bundle membership levels (Corporate and Family):

	A	B	C	D	E	F	G
1	**User ID**	**First name**	**Last name**	**Email**	**Organization**	**Membership level**	**Member bundle ID or email**
2	409684	Roger	Waterson	rwaterson@test.com	Waterson Inc.	Corporate	rwaterson@test.com
3		Bruce	Dickins	bdickins@test.com	Waterson Inc.		409684
4		Karen	Taylor	ktaylor@test.com	Taylor & Associates	Corporate	ktaylor@test.com
5		Susan	Boyer	sboyer@test.com	Taylor & Associates		ktaylor@test.com
6		Maggie	May	mmay@test.com	The Mays	Family	mmay@test.com
7	384829	Kim	Jones	kjones@test.com	The Jones	Family	384829
8		Mike	Jones	mjones@test.com	The Jones		384829
9		Lyle	Carter	lcarter@test.com	Carter & Carter	Corporate	lcarter@test.com
10		Javier	Hernandez	jhernandez@test.com	Carter & Carter		lcarter@test.com
11	374667	Danny	Fargo	dfargo@test.com	Carter & Carter		lcarter@test.com

In our example above, Roger Waterson is assigned to the Corporate bundle membership and so becomes the bundle administrator for a new Corporate bundle. Similarly, Karen Taylor, Maggie May, Kim Jones, and Lyle Carter will all become bundle administrators of their own respective bundles.

If the contact you want to be a bundle administrator is already in your Wild Apricot contact database, you can specify either an email address or the user ID (in column named or mapped to **Member bundle ID or email**). If the contact is new to your contact database, you must specify an email address.

Adding members to bundles

To add a member to a membership bundle through import, set the **Member Bundle ID or email** field for the member to be imported to the email or user ID of the bundle administrator for the appropriate bundle.

Read more/less

	A	B	C	D	E	F	G
1	**User ID**	**First name**	**Last name**	**Email**	**Organization**	**Membership level**	**Member bundle ID or email**
2	409684	Roger	Waterson	rwaterson@test.com	Waterson Inc.	Corporate	rwaterson@test.com
3		Bruce	Dickins	bdickins@test.com	Waterson Inc.		409684
4		Karen	Taylor	ktaylor@test.com	Taylor & Associates	Corporate	ktaylor@test.com
5		Susan	Boyer	sboyer@test.com	Taylor & Associates		ktaylor@test.com
6		Maggie	May	mmay@test.com	The Mays	Family	mmay@test.com
7	384829	Kim	Jones	kjones@test.com	The Jones	Family	384829
8		Mike	Jones	mjones@test.com	The Jones		384829
9		Lyle	Carter	lcarter@test.com	Carter & Carter	Corporate	lcarter@test.com
10		Javier	Hernandez	jhernandez@test.com	Carter & Carter		lcarter@test.com
11	374667	Danny	Fargo	dfargo@test.com	Carter & Carter		lcarter@test.com

In the above example, Bruce Dickins is added to the bundle administered by Roger Waterson using Roger's user ID, while Susan Boyer is added to the bundle administered by Karen Taylor using Karen's email address.

For bundle members, the following fields can be left empty since they will automatically be matched to that of the bundle administrator: m embership level, status, renewal due.

> ⚠ If the **Member bundle ID or email** field is left empty, the import will not change any bundle details for the contact.

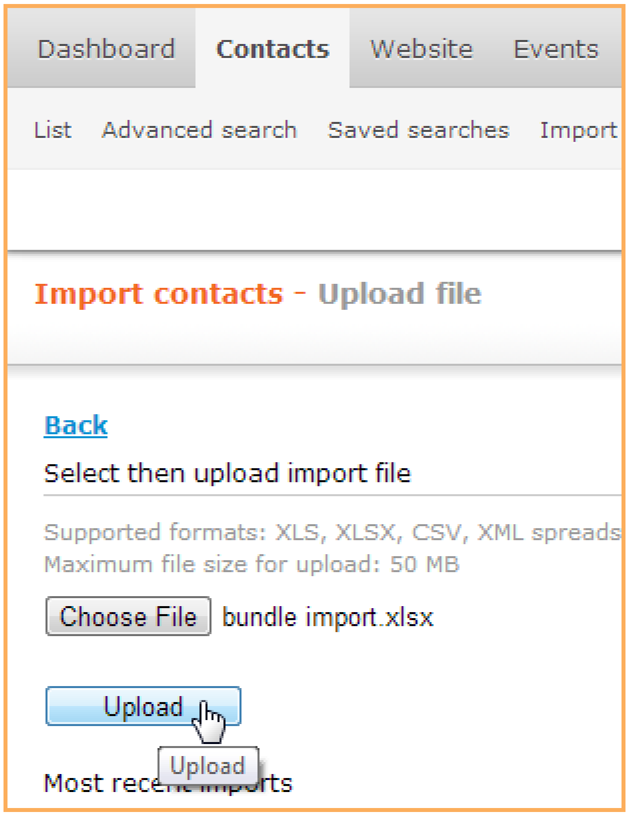
Importing the spreadsheet

Once you've prepared the spreadsheet with your bundle members, you can upload the import file to your Wild Apricot account.

Read more/less

To upload your import file, follow these steps:

1. Hover over the **Contacts** menu and select the **Import** option.
2. Click the **Choose file** button.
3. Select the import file on your computer or network then click the **Open** button. The file must be in either .xls, .xlsx, .csv, or .xml format, and up to 50 megabytes in size.
4. Click the **Upload** button.



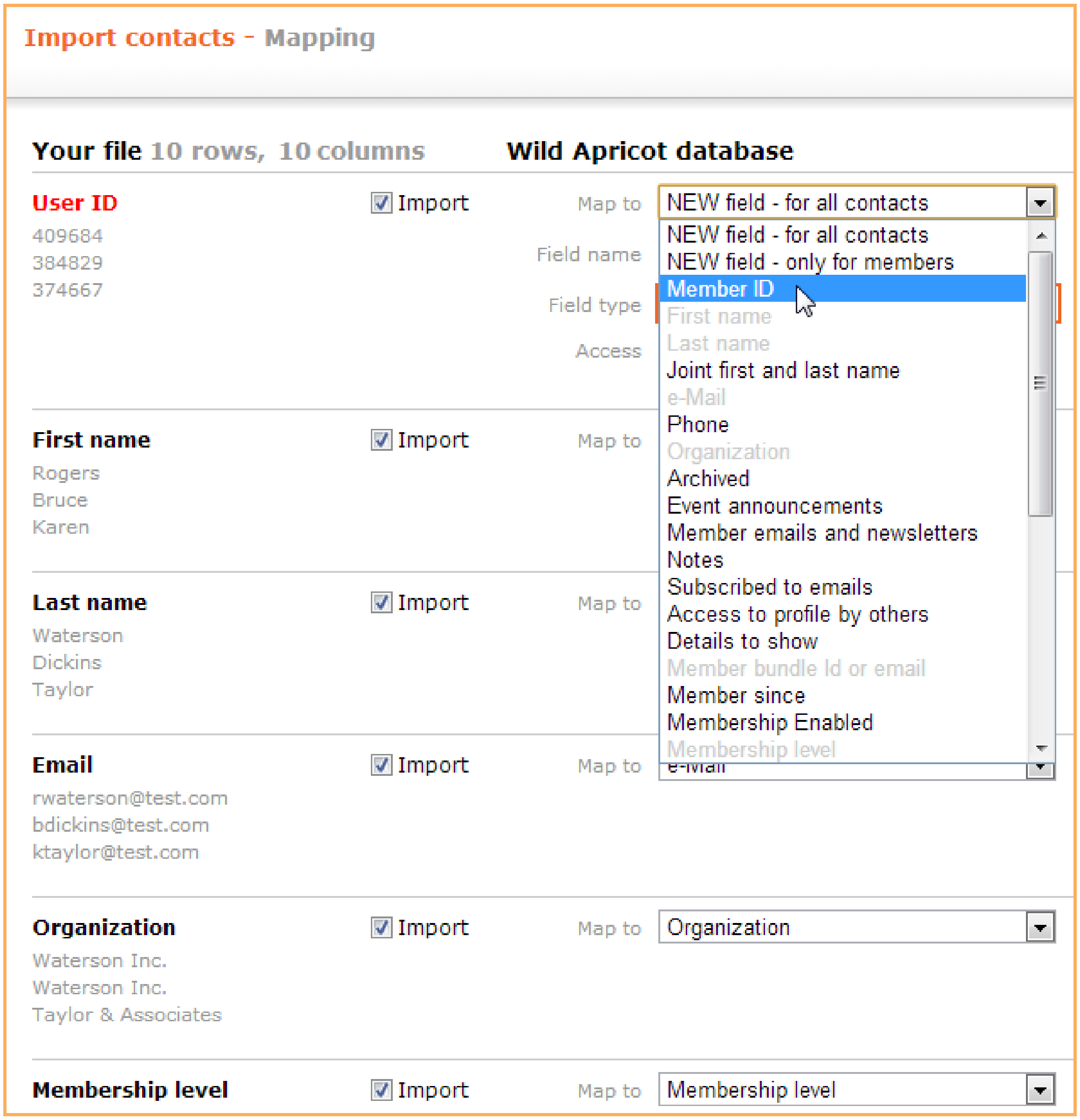
Wild Apricot will now upload and analyze the import file. So that Wild Apricot can process the file properly, you will be prompted to provide some information about the import file. For details, see Importing members and other contacts. After you have reviewed and adjusted the import file settings, click the **Next** button to continue.

Mapping import columns to database fields

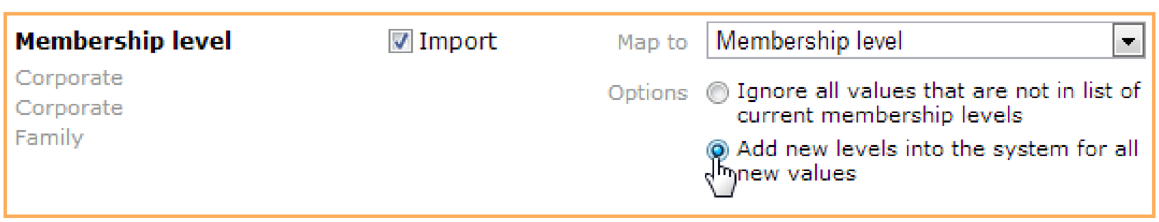
At this stage in the import process, you map (i.e. link) columns in your spreadsheet to fields in your Wild Apricot database.

Read more/less

If the field names in your Excel file match the field names in Wild Apricot, the system will automatically map the respective fields. If not, you can select the fields in your Wild Apricot contact database into which the values for each column will be copied.

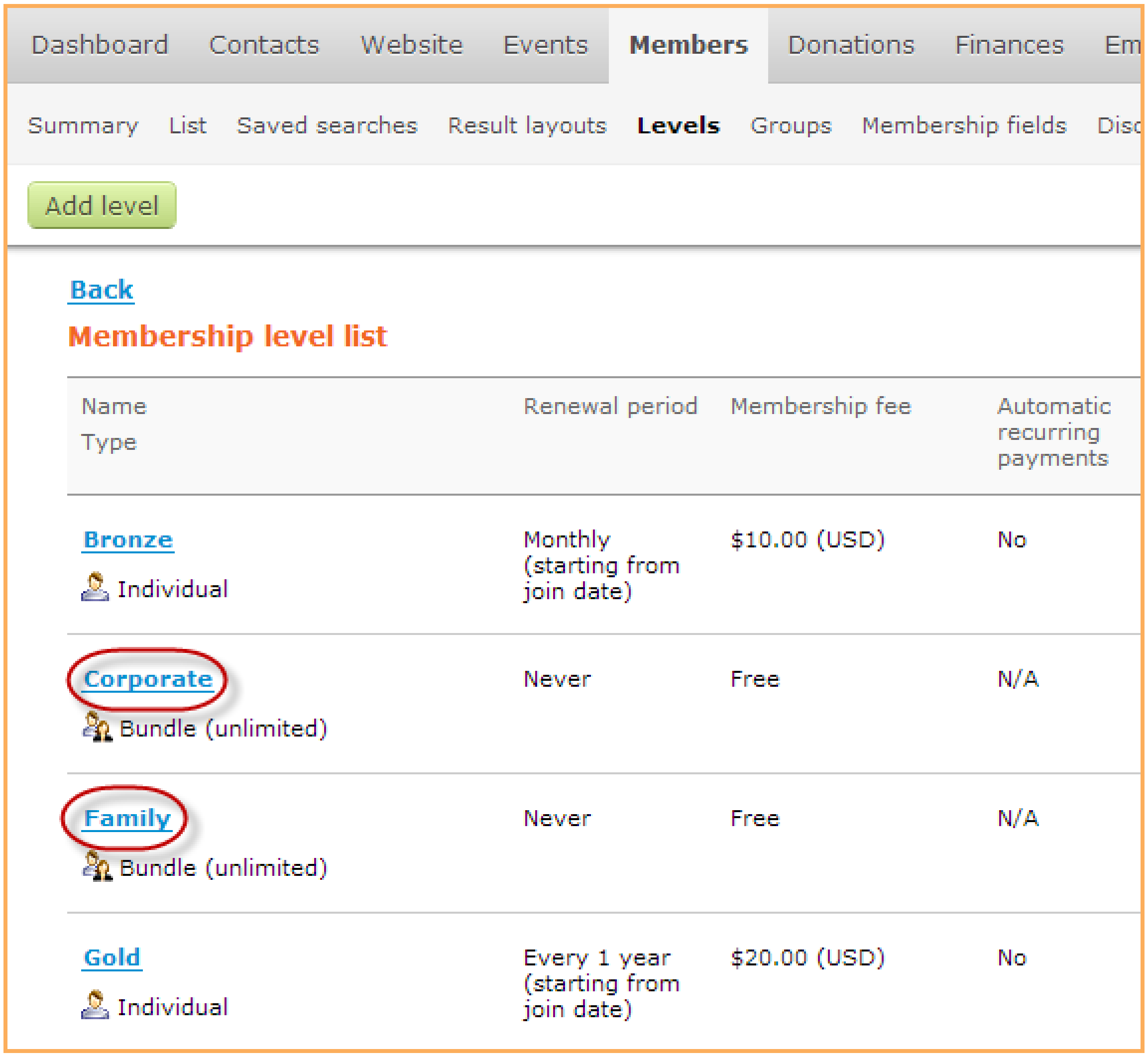


If you want to create a new bundle membership level using values you entered in the spreadsheet in the **Membership level** column, click the **Add new level into system for new values** option beside the **Membership level** entry. This will create a new membership level if the level name in the import file doesn't already exist in the system.



It is usually a good idea to first create all the membership levels you need in Wild Apricot before beginning your import, instead of creating them during import. This will prevent additional unwanted levels from being created if you make spelling mistakes in your spreadsheet.

Once you have completed the import, you can hover over the **Members** menu and select the **Levels** option to view the new bundle levels that were created.



By default, any new bundle levels created via import are automatically set to Free and Unlimited. You can modify them at any time to be limited and paid.

Suspending an entire bundle through import

To suspend an entire bundle, you need to perform two separate imports:

- Import 1: Suspend all bundle members (by setting their **Membership enabled** fields to **No**).
- Import 2: Suspend the bundle administrator at which point the entire bundle will be suspended.

The bundle can be reactivated by importing the bundle administrator and bundle members with **Membership enabled** field set to **Yes**. This will reactivate all bundle members and the bundle administrator.

On this page:

Expand all sections

Bulk changes using import and export

Bulk changes using import and export

You can update multiple contact records in bulk through a three-stage process: exporting your contacts to a spreadsheet, adjusting the spreadsheet values, and importing the adjusted spreadsheet.

> ⚠ Before you begin this process, you should back up your contact database by exporting it to a spreadsheet. Any existing data in imported fields will be overwritten by the imported data. You cannot undo the importing of contact records.

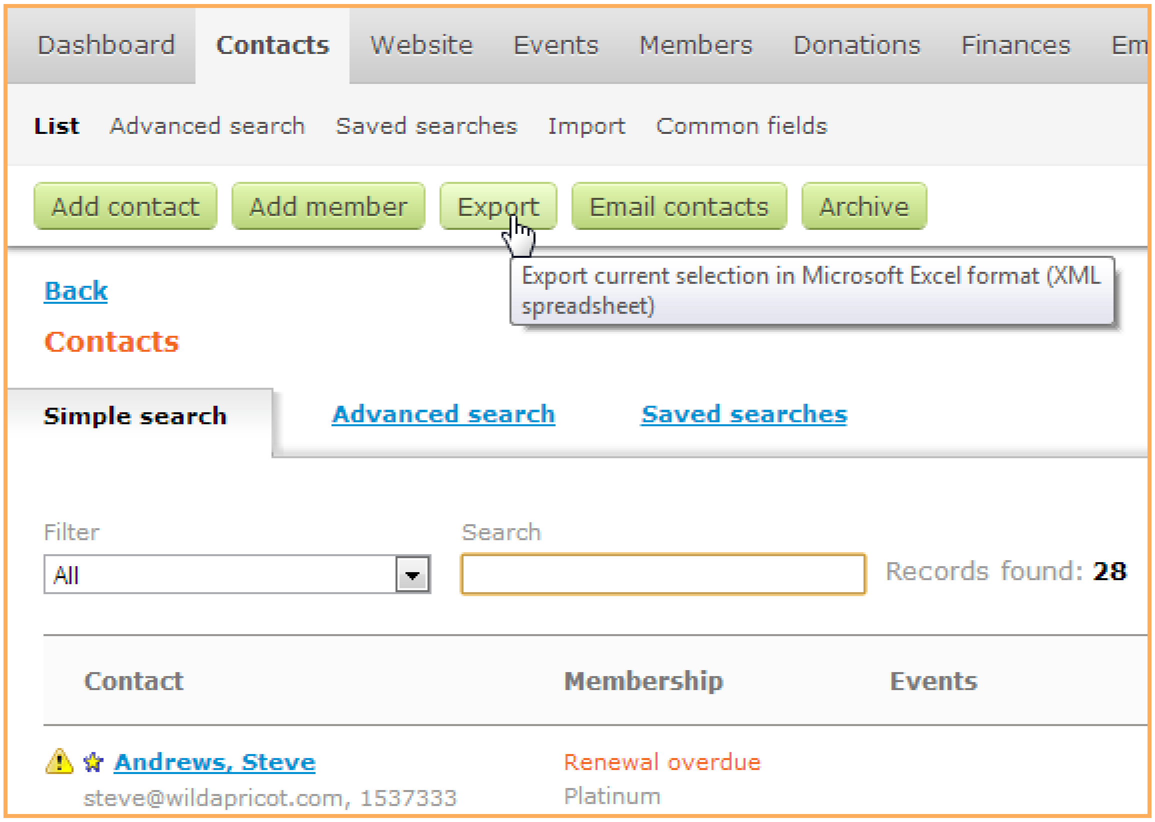
To update multiple contact records using this process, follow these steps:

1. Export existing contact records to a spreadsheet.

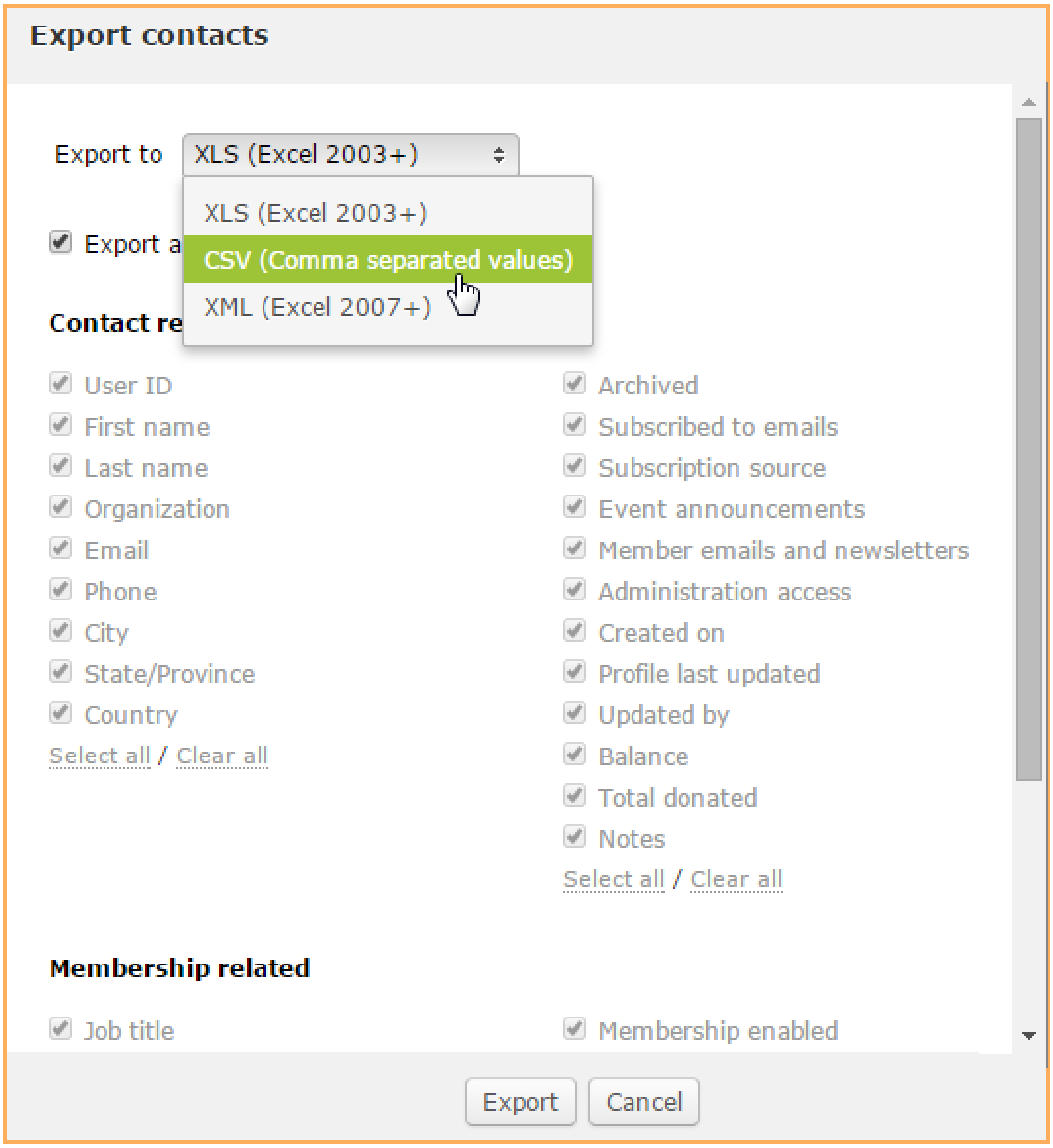
   Click/tap to view/hide details

   To export contact records to a spreadsheet, follow these steps:

   a. Hover over the **Contacts** menu and select the **List** option.
   b. If you want to update only selected contacts, filter the list. You only need to export the records you want to adjust.
   c. Click the **Export** button.

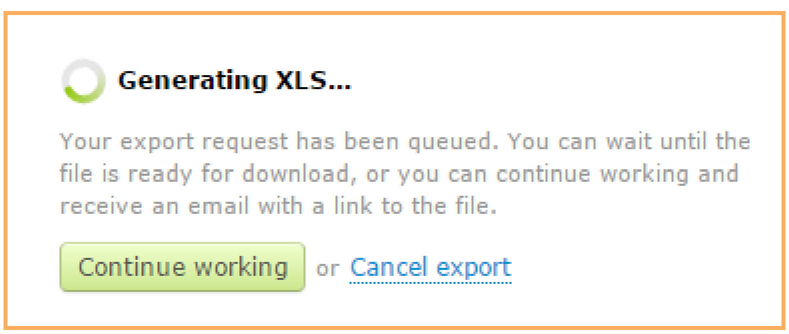


   d. On the screen that appears, select the export file format – XLS, CSV, or XML.



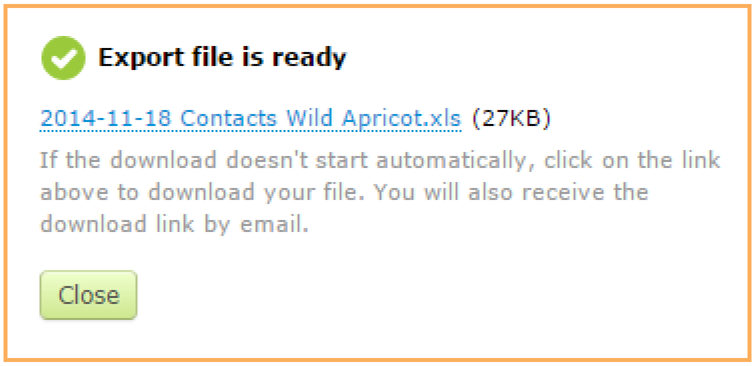
e. Choose which fields to include in the export file.
f. Click the **Export** button.

While the export file is being generated, you can click the **Continue working** button and safely switch to another Wild Apricot admin screen.



Once the file is generated, you'll receive an email with a link to the file.

If you waited until the export file was generated, the file will be automatically downloaded. As well, a dialog with a link to the file will appear, and an email with the link will be sent to you.



Before clicking the download link within the email, make sure you are logged into your Wild Apricot account as an administrator.

You can choose from the following columns:

• User ID • First name • Last name • Organization • Email • Phone • Password • Group participation	• Archived • Subscribed to emails • Subscription source • Event announcements • Member emails and newsletters • Administration access • Created on • Profile last update	• Updated by • Balance • Total donated • Membership enabled • Membership level • Membership status • Member since • Renewal due	• Renewal date last changed • Level last changed • Access to profile by others • Details to show • Photo albums enabled • Member bundle ID or email • Member role • Notes

...plus any custom fields you have added.

Also, the Password column will be exported if you select the **Export all fields** option. The exported Password column will always be empty, but can be used to import passwords.

Any date fields that you export will be formatted using the date format that is selected on your Organization details screen.

2. Adjust the exported values.

Click/tap to view/hide details

With your contact records exported, you can now open the export file in Excel (or any other spreadsheet program) and adjust the exported values.

If you want to be able to restore contact records in case of a mistake on your part, you should modify a copy of the exported spreadsheet.

To simplify the field mapping stage of the process, you might want to delete any columns you don't want to update. Columns not in the spreadsheet will not be updated.

The only required column when updating existing contact records is email address. You can include additional columns for each field you want to update in your contact database. The names of the columns – the column headings – are not important since you can map each column in the spreadsheet to fields in your contact database as part of the import process.

If you want to remove a value – leaving it blank rather than replacing it with another value – enter **NEVER** for system date fields (like Renewal date), and **CLEAR** for custom fields and for the Group participation and Notes system fields.

You can archive multiple contacts – by setting the Archived column to **Yes** – but you cannot delete multiple contacts through importing. Once archived, however, you can delete all the archived records.

You cannot archive a contact through import if the contact has recurring payments enabled. You must first cancel the recurring payments.

You can suspend a member by setting the **Membership enabled** cell to *no*, and reinstate a suspended member by setting the **Membership enabled** cell to *yes*. An empty **Membership enabled** value indicates that the contact is not and was not a member.

For many system fields, you are restricted to entering certain values, or to enter values using a certain format. The valid values and formats for system fields and date fields are listed in the Import field guide.

The following system fields are included in the export file but cannot be updated through importing.

- Administration access
- Balance
- Created on
- Level last changed
- Member role
- Profile last updated
- Renewal date last change
- Subscription source
- Total donated
- Updated by

These fields will be ignored during import if present in your import file.

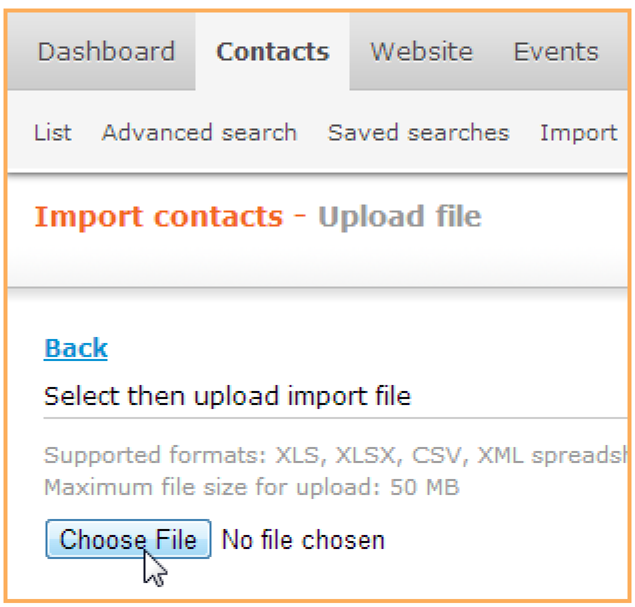
3. Import the spreadsheet.

Click/tap to view/hide details

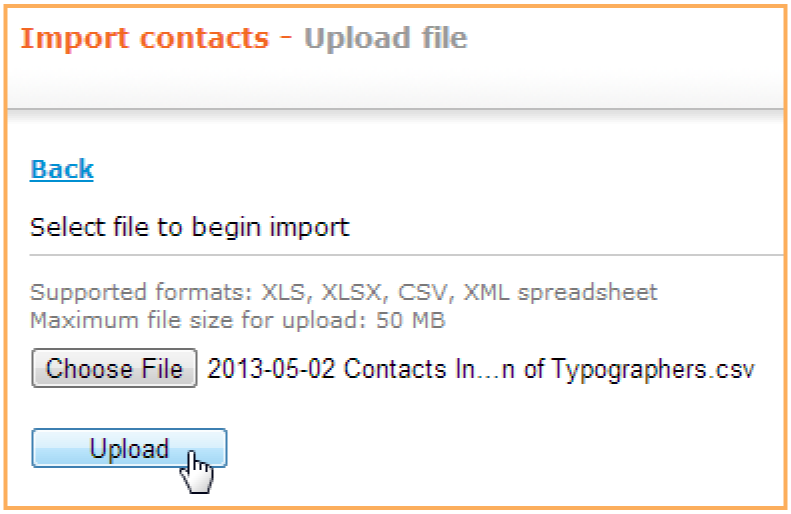
Once you've finished modifying the spreadsheet, you can use it to update your Wild Apricot contact database.

To import the spreadsheet, follow these steps:

a. Hover over the **Contacts** menu and select the **Import** option.
b. Click the **Choose file** button.



c. Select the import file on your computer or network then click the **Open** button. The file must be in either .xls, .xlsx, .csv, or .xml format, and up to 50 megabytes in size.
d. Click the **Upload** button.



Wild Apricot will now upload and analyze the import file. So that Wild Apricot can process the file properly, you will be prompted to provide some information about the import file.

For details on the remaining steps in the import process, see Importing members and other contacts.

> You can update only common and membership fields through importing. Other data related to events, donations, and finances can only be exported.

You can also perform mass updates of certain information from within Wild Apricot. You can:

- Update the privacy settings for all members.
- Clear the contents of a custom field for all contacts, by deleting the custom field and recreating it again.

> You can import existing payments and event registrations into your Wild Apricot database using the Wild Apricot API. For more information, see Payments API V2 call and EventRegistrations API V2 call.

Import field guide

Import field guide

You can import data from spreadsheets into your Wild Apricot contact database. You can use importing to add new contact records or update existing ones. As part of the import, you can create new database fields and new membership levels.

> You can update only common and membership fields through importing.

For instructions on uploading the import file, see Importing members and other contacts.

Spreadsheet file format

The spreadsheet containing the data you want to import must be in either .xls, .xlsx, .csv, or .xml format, and up to 50 megabytes in size.

> If the file consists of multiple sheets, the import process may hang. If successful, only the last sheet in the file will be imported.

Required columns

There are no required columns when adding **new** contact records through import, though it is a good idea to include one for the email address, since email address is the primary identifier for contacts in Wild Apricot, and is required for contacts to sign in and perform self-service functions. The only required column when updating **existing** contact records is email address. You can include additional columns for each field you want to update in your contact database. The names of the columns – the column headings – are not important since you can map each column in the spreadsheet to fields in your contact database as part of the import process.

Updating existing contacts

To update existing contact records, make sure the columns that map to the **User ID** or **Email** fields in your Wild Apricot contact database contains existing values. Then, enter values in the columns that correspond to the fields you want to update. Blank cell values will be ignored.

If you want to remove a value – leaving it blank rather than replacing it with another value – enter **NEVER** for system date fields, and **CLEAR** for custom fields, and for Group participation, Organization, and Notes system fields (basically, any non-date field).

Adding new contacts

To create new contact records, the **Email** column should contain email addresses that are not currently in your contact database. For new records, any value entered in the User ID column will be ignored since user IDs are automatically generated by the system.

Importing members

If you are importing members, include a **Membership level** column and enter the appropriate level for each member. You can assign contacts to existing membership levels, or enter a new level name to create a level for them.

Optionally, you can also set values for the **Member since** and **Renewal due** columns. If you don't include columns for these fields, the **Memb er since** value will be set to the import date, and the **Renewal due** value will be set according to the renewal settings for the membership level.

The **Membership enabled** column will be automatically set to *Yes* , and the **Membership status** will be automatically set to *Active* when you specify a membership level value. However, for best results when importing members, you should include a **Membership enabled** colum n and set the values for all members to *Yes*. If you are importing lapsed members, be sure to set the **Membership status** column to *Lapsed* .

System fields that cannot be updated

The following system fields cannot be updated through importing, for security reasons.

Read more/less

- Administration access
- Renewal date last changed
- Level last changed
- Member role
- Balance
- Total donated
- Created on
- Updated by
- Profile last updated

System fields that can be updated

System fields already exist within your Wild Apricot database and do not need to be created in your common or membership fields.

The following system fields can be updated through importing.

Read more/less

For many system fields, you are restricted to entering certain values, or to enter values using a certain format. The valid values and formats for system fields are listed below.

System field	Valid values	Notes
User ID	Usually a 5, 6 or 7 digit number	This is a unique ID automatically generated by the system. You can enter an existing user ID to identity an existing contact in your database. You cannot create your own user ID; any values not found in your Wild Apricot database are ignored and replaced with a system generated ID.

Email	Any valid email format (i.e. randymarsh@ naccp.com)	If the email address entered already exists in the database, then the existing record will be updated. Otherwise, a new record will be created. If multiple records within the import file use the same email address, only the first record will be imported and the other records using that address will be ignored.
Group participation	Name of the member group Any combination of letters, numbers, characters, and spaces	If you specify a member group that does not already exist in your Wild Apricot account, you will have the option to create it during the mapping stage of the import process. To assign a member to more than one group, enter the group names on separate lines.
Password	Any combination of letters, numbers, and characters; no spaces Minimum number of characters: 7 Maximum number of characters: 50	Leave empty if you do not want to update the current user passwords. Passwords can only be imported, not exported.
Membership enabled	**Yes** - contact is a member **No** - membership is suspended; contact no longer treated as a member	If set to **No**, all membership fields are ignored during import.
Membership level	Name of your membership level Any combination of letters, numbers, characters, and spaces	If you specify a membership level that does not already exist in your Wild Apricot account, you will have the option to create it during the mapping stage of the import process.
Member bundle ID or email	The user ID or the email address of a bundle administrator.	Use this field to bind members to the same bundle (see Importing bundles).
Member since	Use supported date format (see below)	
Renewal due	Use supported date format (see below) Or set to **Never -** if member is not required to renew.	
Status	**Active -** Member enjoys all member benefits **Lapsed -** Member has not paid his/her dues in time **Pending - Renewal -** Member initiated the renewal process, but payment has not been confirmed yet **Pending - Level Change -** Membership level change was initiated, now waiting for payment confirmation or approval. **Pending - New** - New application is awaiting approval or payment confirmation.	See How membership status affects available functionality.
Subscribed to emails	**Yes** **No**	If **Yes,** contacts will be able to receive aut omatic email notices. Setting to **No** disables emails being sent to this contact (regardless of the **Event announcements** and **Member emails and newsletters** settings).

Event announcements	**Yes** **No**	This controls whether automatic event notices and reminders are sent to the contact. This setting is ignored if **Subscribed to emails** is set to **No** .
Member emails and newsletters	**Yes** **No**	This controls whether the user receives email blasts sent by Wild Apricot. This setting is ignored if **Subscribed to emails** is set to **No** .
Archived	**Yes** **No**	Set to **Yes** if you want the contact archived.
Access to profile by others	**Yes** **No**	Set to **Yes** if you want this contact's profile to be seen by others.
Details to show	Member ID&&Nobody First Name&&Anybody Last Name&&Members etc.	You can control which kind of visitors can view individual profile fields using the following format: *fieldname&&permission* where *fieldname* is the name of the field, and *permission* is **Nobody**, **Anybody**, or **Member**.
Photo albums enabled	**Yes** **No**	Set to **Yes** if you want to enable photo albums for this member.
Notes	Any characters	Admin-only field, typically used by the system to record information not captured by other fields (i.e. automatic membership emails sent, when member was renewed, etc.)

Any other system fields included in the import file will be ignored.

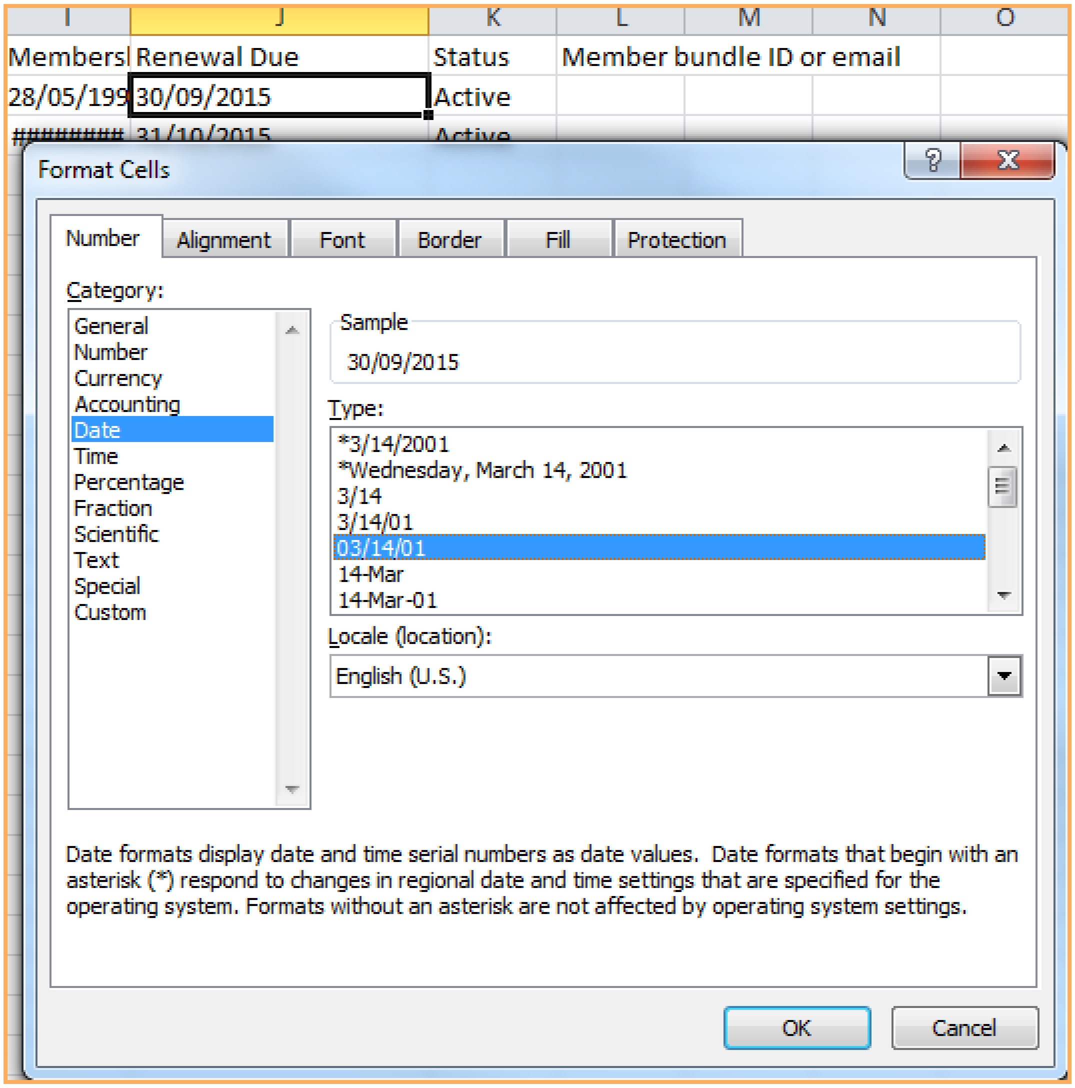
Values vs. calculated values

You cannot import calculated values – cells that uses formulas rather than actual values. Only actual values can be imported.

Supported date formats

Date fields – membership start date, for example – must be formatted using an Excel date format.

Read more/less



Otherwise, an error will occur when importing the file.

If you are importing using a CSV file, the date fields must use one of the following date formats:

Format	Example
dd mm yyyy	31 Dec 2014
yyyy-MMM-dd	2014-Dec-31
MM/dd/yyyy	12/31/2014
dd/MM/yyyy	31/12/2014
yy/MM/dd	14/12/31
dd-MMM-yy	31-Dec-14
yyyy-MM-dd	2014-12-31
dd.MM.YYYY	31.12.2014
MM.dd.YYYY	12.31.2014

Do not include the time of day within a date field.

On this page:

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Adding a new contact manually

Adding a new contact manually

Everyone stored in your Wild Apricot database is a contact. A contact may be a member of your organization, but doesn't have to be. Instead, a contact could be a donor or event attendee without necessarily being a member.

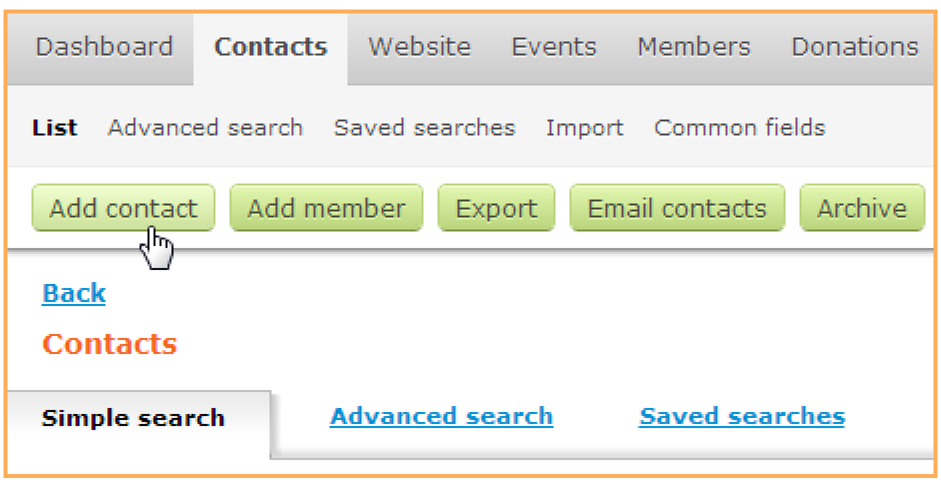
There are several different ways you can add contacts to your database.

- Manually add them one at a time (see below)
- Import them in bulk from a spreadsheet (see Importing members and other contacts)
- By setting up a membership application form, event registration form, donation form, or subscription form on your Wild Apricot site so that visitors can sign up as members or for events, donations, or email subscriptions and thereby automatically add themselves to your contact database

> ⚠ If an existing contact completes one of these forms using the email address stored on file for them, another contact record will not be created. Instead, the details of the new transaction will be added to the existing record.

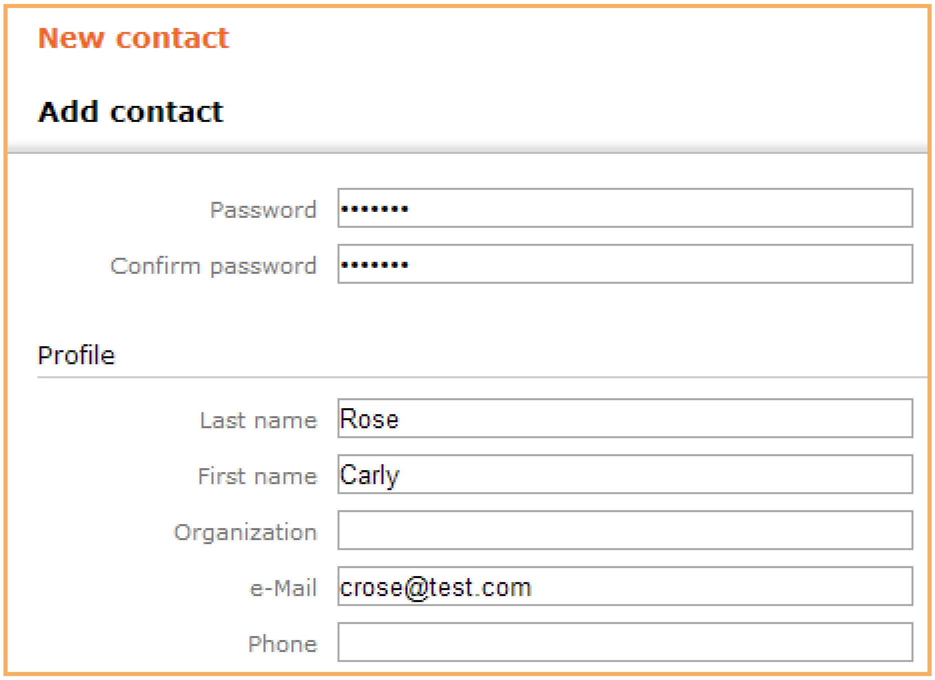
To manually add a contact to your database, follow these steps:

1. Under the **Contacts** menu, select **List**.
2. Click the **Add contact** button.



3. On the next screen, fill out the contact's details. In the password fields, you can assign a password to the contact. You must fill in at least one of these fields: First name, Last name, Organization, Email. If you want to store more information about contacts, you can

add your own common fields.



4. Click **Save**.

The contact is now added to your contacts list. When you add a contact manually, an email with their password is not automatically sent. You can email the password to the contact by clicking the **Email new password** button from the **Login details** section of the **Contact details** tab on their contact record. If you don't assign or email a password to the contact, they can click the **Forgot password** link on your site's login form to receive an email with a link to reset their password.

To make the contact a member, click the contact within your contacts list, then click the **Membership** tab. From the Membership tab, click the **Assign membership** button. On the other contact details tabs, you can view and modify other contact details.

See also:

- Contact list
- Importing members and other contacts
- Customizing database fields
- Viewing and editing contact details

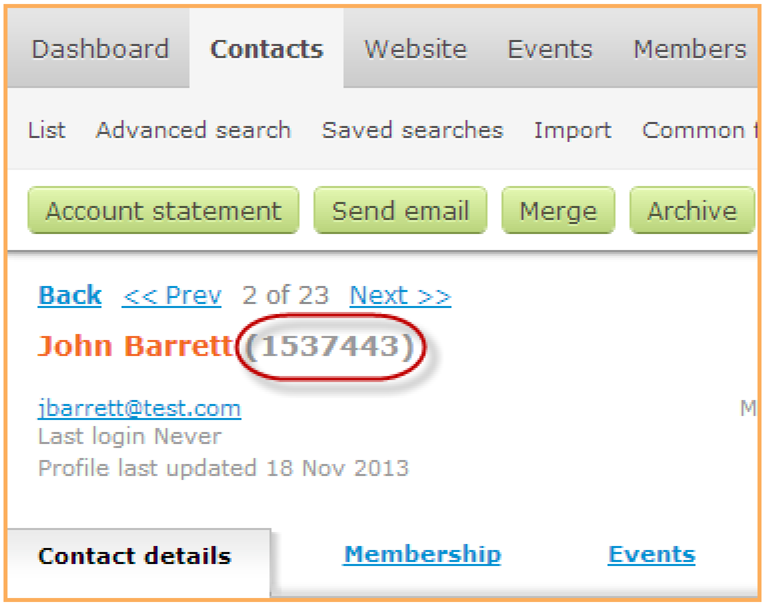
User ID

User ID (aka Member ID)

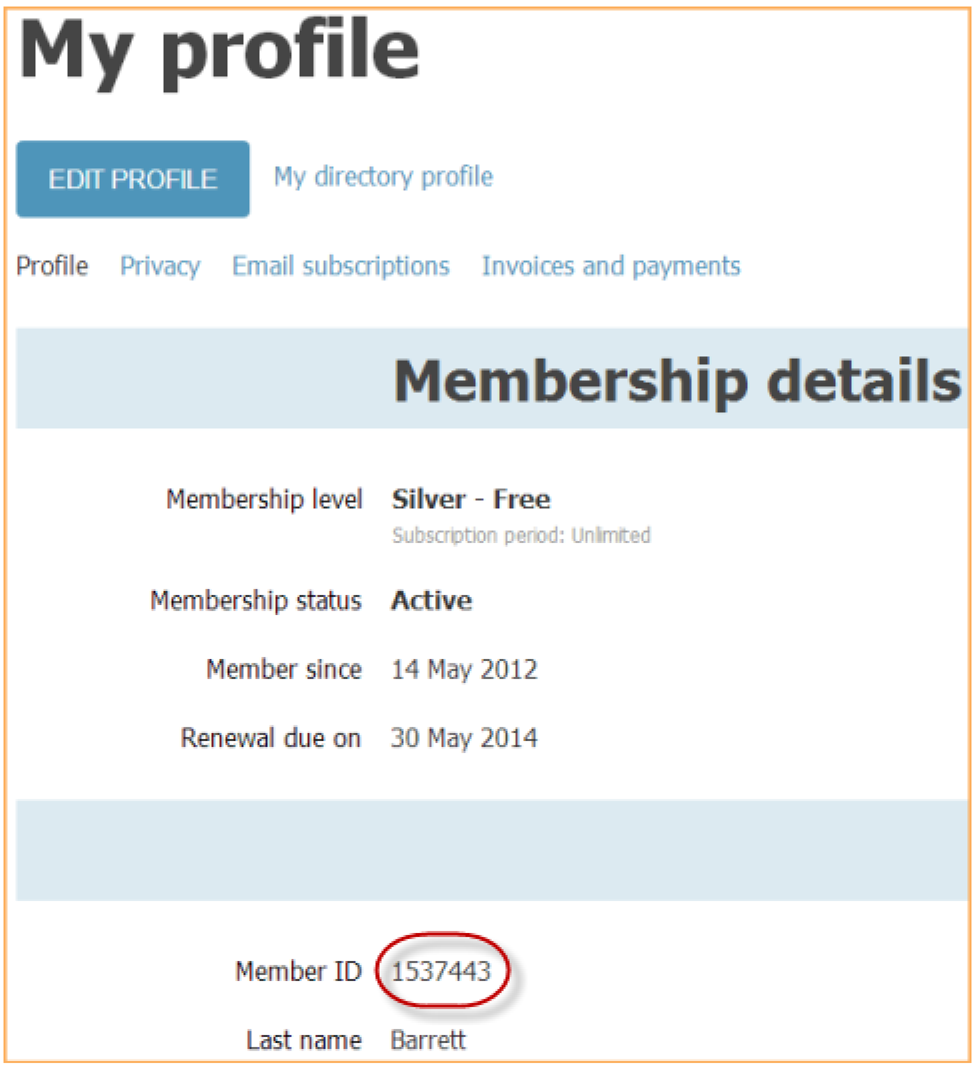
When a new contact is added to your database, they are automatically assigned a unique number called **User ID** (aka Member ID). This number is generated by the system and cannot be modified (even via import). It will continue to be used to identify the contact until the contact record is deleted.

When importing contacts in bulk from a spreadsheet, Wild Apricot will use the User ID (or email) to match the records being imported with existing contacts. If the User ID already exists, the existing contact record will be updated with the information being imported. Otherwise, a new record is created.

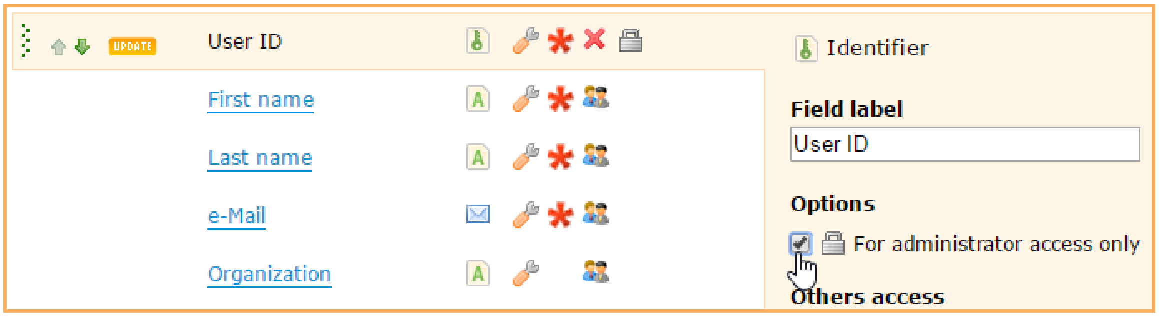
Administrators can view the User ID from the contact details screen.



The User ID appears to contacts as the Member ID on their member profile.



Administrators can prevent the Member ID from appearing on the member profile by checking the **For administrator access only** option for the User ID field on the Common fields screen.



Adding member records manually

Adding members manually

A member is a contact who has been assigned to a membership level.

There are three ways a member can be added to a Wild Apricot database:

- By members themselves, using an online self-service membership application form.
- By an administrator, using a spreadsheet to import membership data in bulk.
- By an administrator, manually, one at a time.

Bundle administrators can also add members to their bundles. For more information, see Membership bundles.

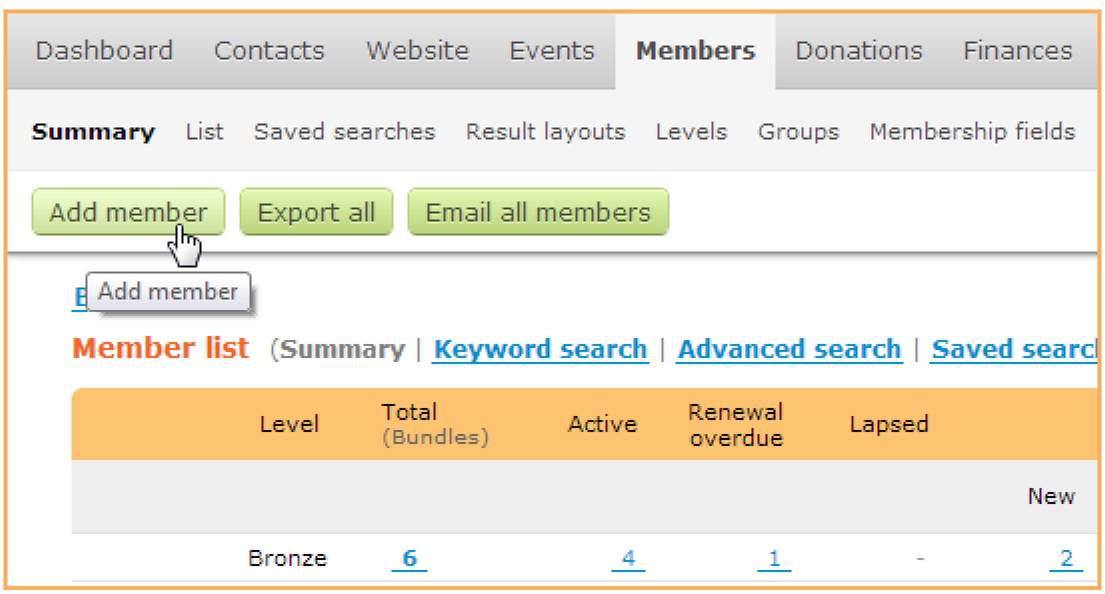
An administrator can add a member directly, or add a contact then convert the contact to a member. In either case, you will be asked to choose whether to generate an invoice or activate without an invoice.

Adding a member directly

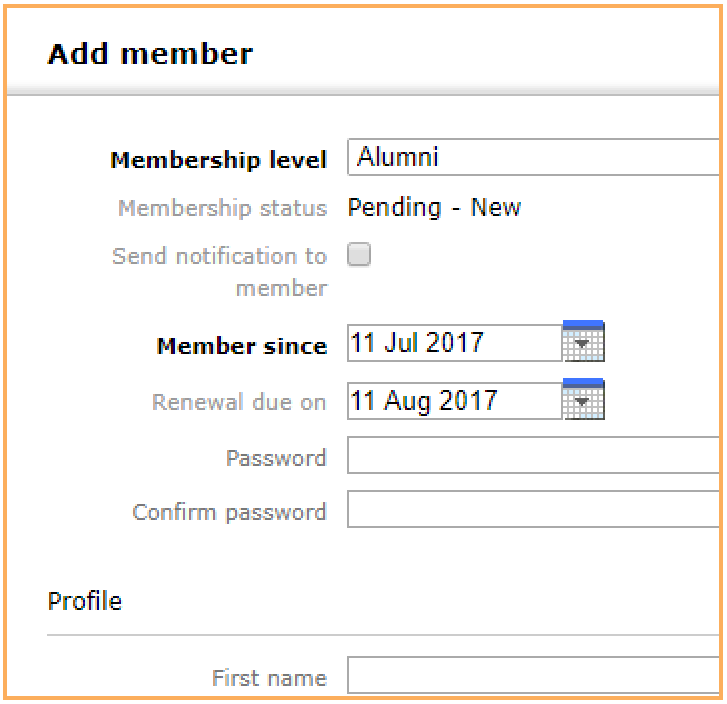
To add a new member directly, hover over the **Members** menu and select either the **Summary** or **List** option.

Read more/less

From your member summary or member list, click the **Add member** button.



On the next screen, you fill in the member's details.

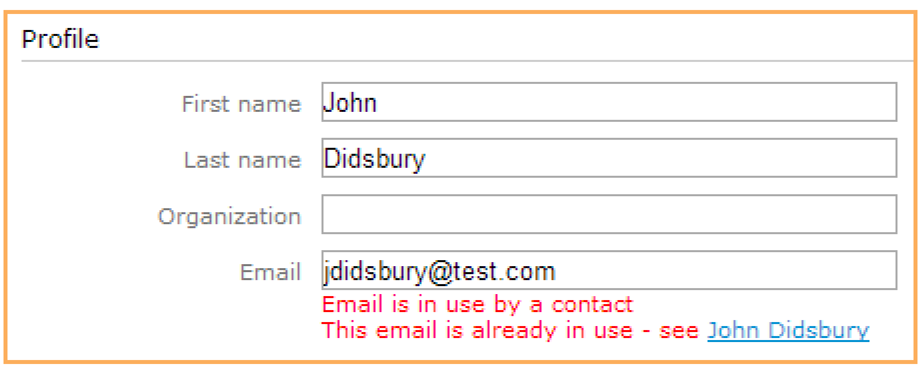


You can specify the following information about the member.

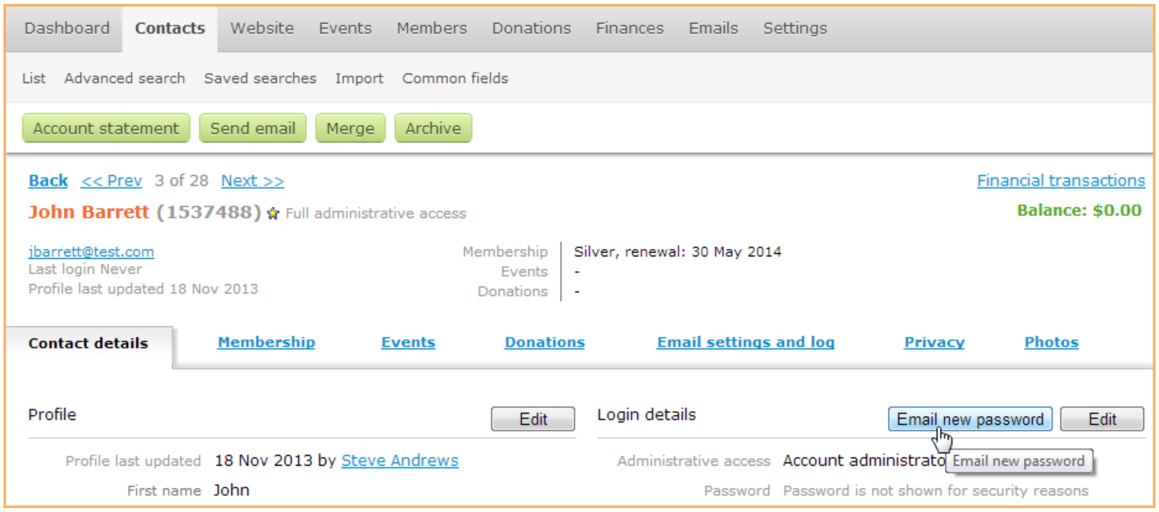
- **Membership level** – This is a required field. See Membership levels for more information.
- **Password** – You can assign an initial password if you want, but the member can always set this password themselves using the **Forgot password** link.
- **Common fields** – Fields that appear on all forms and apply to all contacts. When manually adding a member, only one of the **E mail**, **First name**, **Last name**, or **Organization** fields is required. A value should be specified for **Email** since it is required to log onto a Wild Apricot site.
- **Membership Fields** – Additional fields used by members only. For more information, see Customizing your contact database fields.

When you are finished entering details about the member, click the **Save** button.

If you have entered an email address that is already in your database (even if it is part of an archived record), an error message will appear with a link to the existing contact's record.



When you add a member manually, an email with their password is not automatically sent. You can email the password to the member by clicking the **Email new password** button from the member's **Contact details** tab on their contact record.



To customize the password email, hover over the **Settings** menu and click the **Contacts** option. Under the **Contacts settings** list, click **P assword email**.

Converting a contact into a member

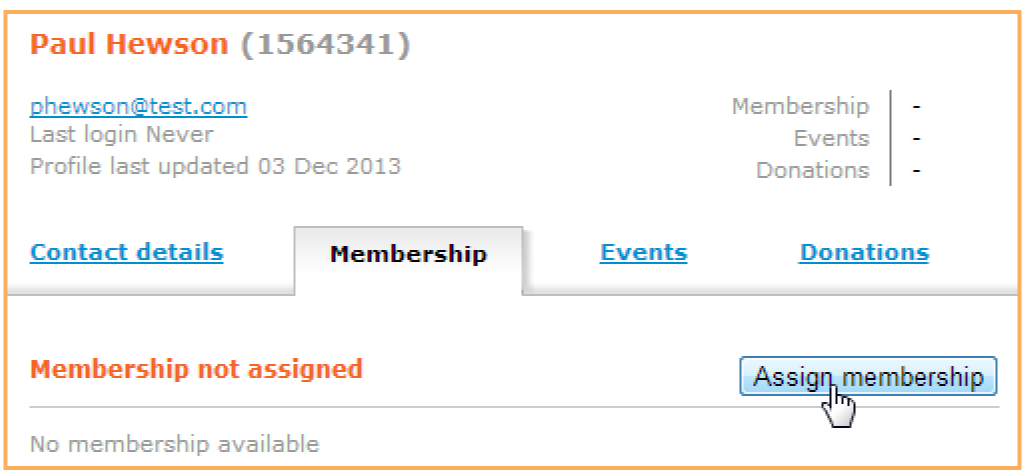
You can convert a non-member contact into a member.

Read more/less

A contact does not have to be a member of your organization. For example, a contact can be an event attendee or a donor without having been assigned a membership level.

To convert a non-member contact to a member, follow these steps:

1. Hover over the **Contacts** menu and select the **List** option.
2. Find the contact's record.
3. Open the contact's record by clicking on it within the list.
4. Click the **Membership** tab.
5. Click the **Assign membership** button.



6. On the **Assign membership screen**, choose the membership level. You can also assign a password, and enter information in the common and membership fields.
7. Click the **Save** button to save your changes.

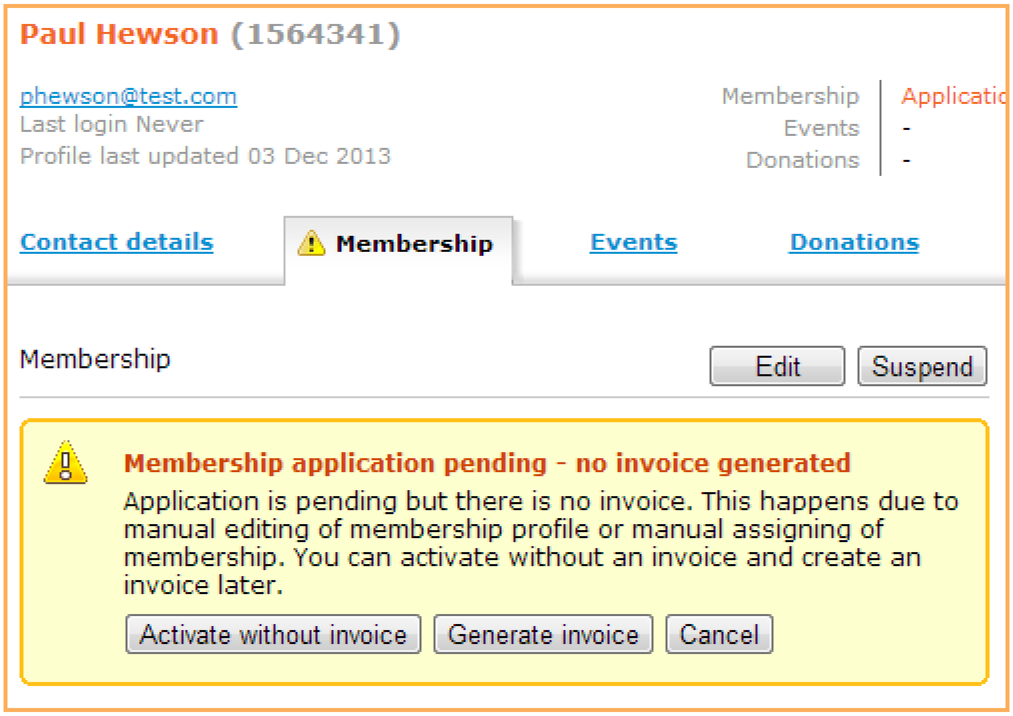
Activating the membership and generating an invoice

When you manually add a member, or convert a contact to a member, an invoice is not automatically generated. You will be asked to choose from the following options:

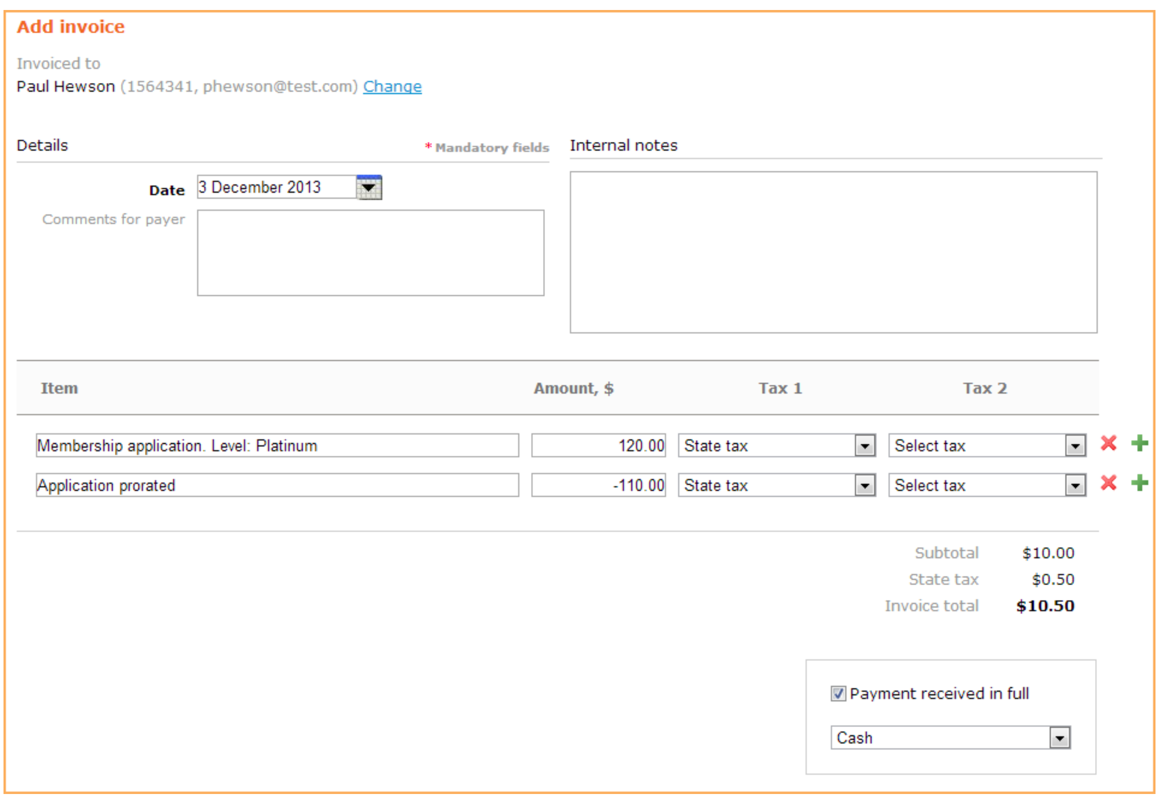
Read more/less

- **Activate without invoice** – activates the membership without generating an invoice. Choose this option if you are waiving the membership fee or if you do not want to track this transaction in Wild Apricot.

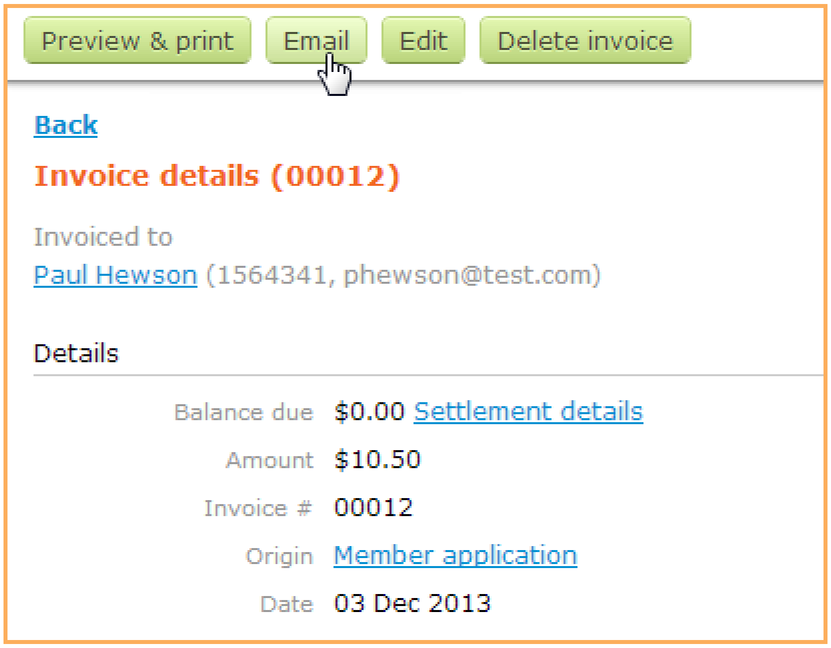
- **Generate invoice** – generates an invoice for the member application. The member can then pay the invoice online through their profile or by using an offline payment method (e.g. cash, check). Depending on the settings for the selected membership level, the membership might not be activated until payment is received and/or the application is approved by an administrator.
- **Cancel** – cancels the membership, but keeps the contact in the database.



If you choose to generate an invoice, you will have the option of recording the payment right away (assuming you already received the payment), or leaving the invoice as unpaid. If you leave it as unpaid, the member can log in later and pay the invoice from their profile.



After saving the invoice, you can email it to the member. Emailing the invoice is an effective way of letting the member know that payment is required.



On this page:

Expand all sections

Emailing the password link

Emailing the password link

When you add new contacts or members through importing, they will **not** receive a welcome email with their login credentials. You have to manually email them with a password reset link.

Within the body of your email message, let your new members know about your site and their membership, and include the {Contact_Password_Reset_URL} which displays a password reset link. A sample welcome message appears below:

```
Hi {Contact_First_Name},

Welcome to the new association website! You have been added as a member.

You can use your email address to log in to your member profile:

{Contact_Email}

If this is your first time logging in, please use the following link to reset your
password:

{Contact_Password_Reset_URL}

An email will be sent to you to reset your password.

Once you've logged in, you will be prompted to accept the terms and conditions.

Then, you can go into your profile and update and verify your contact information.

Let's make this association something special!

The Association Team
```

Membership levels

Membership levels

You can create multiple membership levels, each with different membership fees, subscription periods, renewals policies, and benefits. Membership levels define and distinguish different types of members.

Assigning a membership level to a contact makes the contact a member. A member can only be assigned to one membership level at a time.

You can limit access to pages, events, event registration types, and custom membership fields by membership levels. Inclusion in a member directory can also be restricted by membership level. As well, you can choose recipients for event announcements using membership levels.

The summary view of your member list is grouped by membership level.

Membership level types

There are two types of membership levels: individual and bundle.

Read more/less

Individual membership levels allow people to join by themselves. You can set up any number of individual levels with different membership fees, subscription periods, renewals policies, and benefits. For information on setting up individual membership levels, see below.

A bundle membership level allows multiple people to join your organization as a group. Bundles members share the same status, renewal date, status, and membership level. Bundles can be used to offer a discounted group membership to companies, teams, or families. For information on setting up bundle membership levels, see Membership bundles.

To summarize:

	Individual levels	**Bundle levels**
Members are added...	By themselves or a site administrator	By the bundle administrator or a site administrator
Status, renewal date, status, membership level	Individual	Shared

Membership fee is charged to...	Individual	Bundle administrator

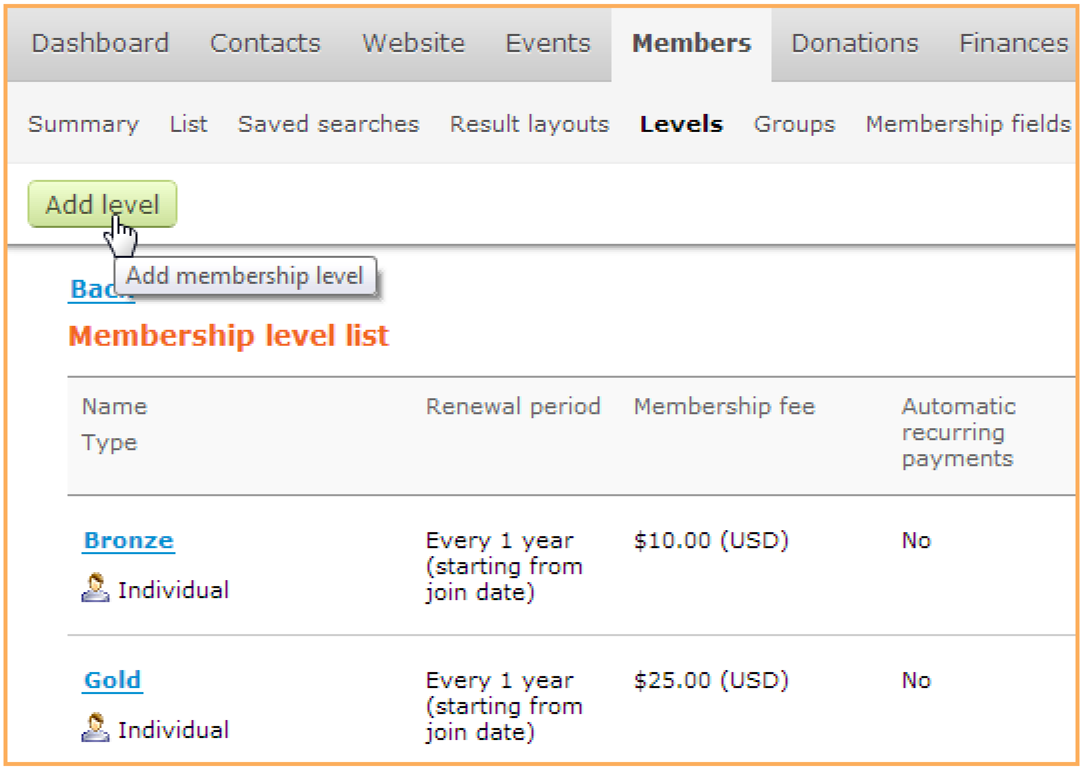
Setting up individual membership levels

To allow visitors to your site to join your organization, you must set up one or more membership levels.

Read more/less

To set up a new individual membership level, follow these steps:

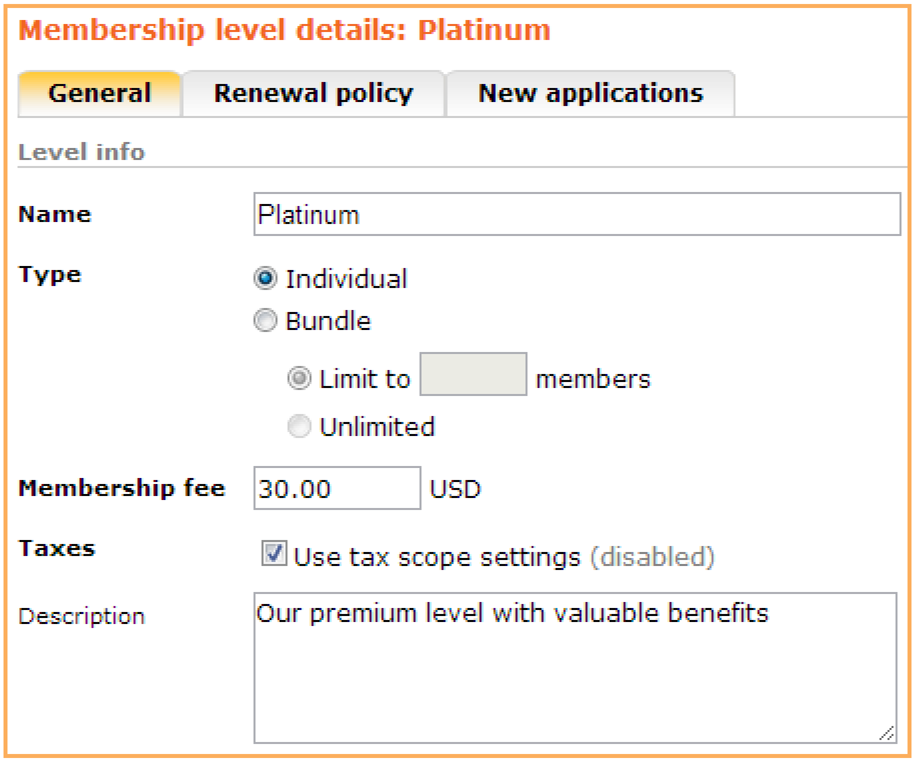
1. Hover over the **Members** menu and click the **Levels** option.
2. From the membership level list, click **Add level**.



3. Enter the name of the membership level (e.g. Gold) in the **Name** field.

> Do not use a name that includes the < symbol. It may interfere with online payment processing.

4. Beside **Type**, click **Individual**.
5. Enter a membership fee and choose whether to apply your tax settings to the fee.
6. Enter a description for the level. The description will appear below the membership level details on the membership application form.



7. Click the **Renewal policy** tab and decide on your membership renewal policy (see below).
8. Click the **New applications** tab and decide how you want to handle new applications (see below).
9. Click **Save** to finish creating the membership level and add it to the membership level list.

To modify an existing membership level, click the level within the list.

General settings

On the General tab, you can enter the following information about the membership level.

Read more/less

Option	Description
Name	The name used the identify the membership level (e.g. Gold). Do not include angle brackets (< or >) in the level name as these can interfere with payment processing.
Type	Indicates whether this is an individual or bundle level. For information on bundle membership levels, see Membership bundles.
Membership fee	The cost of the membership to be applied according to the renewal policy. For free memberships, enter a value of 0.
Taxes	Choose whether to apply your tax settings to the membership fee.

Payment method	Choose whether to accept online and/or online payments for this level. Depending on which payment method option you choose, different payment workflows will take place after the applicant completed the membership application form. • If only offline payment is enabled, then the applicant will have the option of cancelling or confirming the application. If the applicant clicks the **Confirm** button, an invoice will be emailed to them, and a membership application summary will be displayed. From the application summary, the applicant can choose to view or pay the outstanding invoice. • If only online payment is enabled, then a **Pay online** button will appear. Clicking the **Pay online** button will take the applicant to the online payment screen for your site's payment provider. • If both online and offline payment is enabled, then two buttons will be displayed: **Pay online** and **Invoice me**. Clicking the **Pay online** button will take the applicant to the online payment screen for your payment provider. Clicking the **Invoice me** button will result in the applicant being emailed an invoice – which they can pay online or offline – and a membership application summary being displayed. From the application summary, the applicant can choose to view or pay (online) the outstanding invoice. When paying using PayPal Payments Pro, the **Pay online** button with be replaced with two buttons: **Pay with credit card**, and **PayPal Express checkout**.
Description	The description that appears below the membership level details on the membership application form.
Public can apply	Controls whether visitors to your site can apply for this membership level. Disable this option if you only want to manually assign members to this level.
Member can change to	Controls whether members can switch from this to a different membership level. If you enable this option, you then choose the levels that members can switch to. Note: members who switch levels will be billed the full membership fee for the new level. All refunds must be done manually. For more information, see Member - renew or change level.

Renewal policy

From the Renewal policy tab, you choose the renewal period and the date of renewal, and decide on your membership renewal approach.

Read more/less

You can choose from the following approaches:

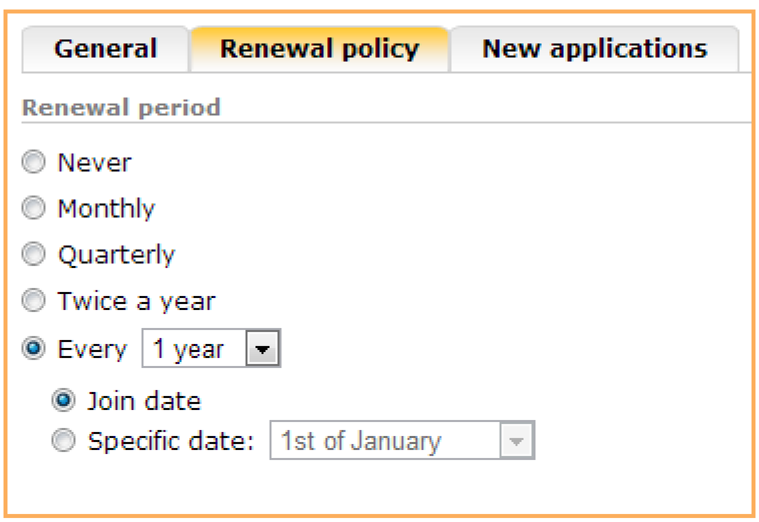
Approach	Degree of automation	Description	Steps

Recurring payments	High	*(Community plans and higher)* Memberships will be automatically renewed and the membership fee automatically paid. Members will receive an email confirmation but won't be required to do anything.	1. Configure your payment settings to support recurring payments. 2. Check the **Enabled** option under **Automatic recurring payments**.
Automatically generate renewal invoices	Medium	Automatically generate membership renewal invoices and email to members a specific number of days before their renewal date. Members can click the email link and pay the fee and immediately renew their membership without even having to log in.	1. Under **Renewal reminders and actions**, check the **Generate and email invoice** option. 2. Check option to send the renewal reminder email to the member and/or the organization contact.
Renewal reminders	Low	Members will receive pending renewal notices, but the onus is on them to log in to the site and renew their membership.	1. Check option to send a renewal reminder email to the member on or *x* days before the renewal date.

If optional extra charges are included in membership renewals, you might want members to renew their memberships themselves – without receiving automatically generated invoices – so that they can decide whether they wish to pay for the optional extras.

Renewal period

In the **Renewal period** section, you choose when memberships at this level come up for renewal. First, you choose the renewal interval – monthly, quarterly, twice a year, every *x* years, or never – then you choose the actual date of renewal. The renewal date can be set to the date the member joins (join date), or a specific day of the month (e.g. 1st or 15th).



You have the option of allowing membership dues for new members to be adjusted proportionally according to the actual remaining time before the next renewal date. For more information, see Prorating membership dues for new applications.

Automatic recurring payments

You can set up recurring payments so that memberships can be automatically renewed on a regular schedule.

Recurring payments are available only for Community plans and higher (see Pricing).

Before you can enable recurring payments for membership levels, you must configure your payment settings. For more information, see Recurring payments.

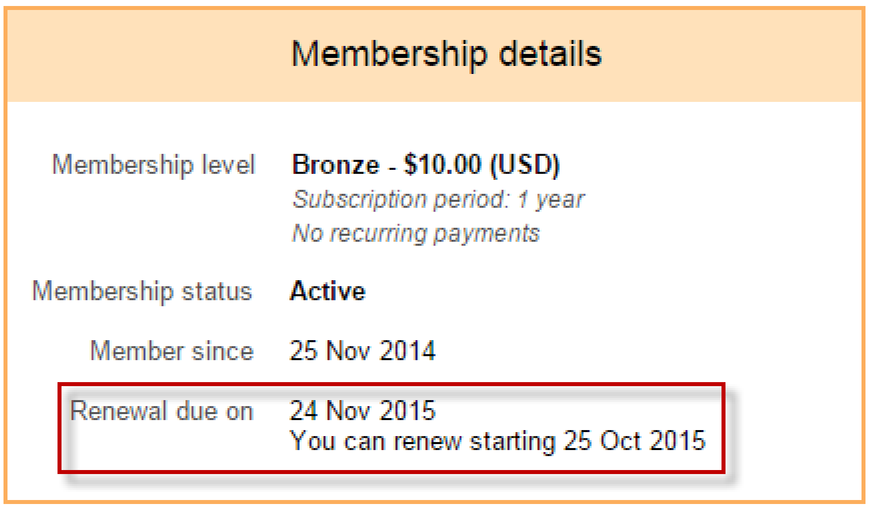
To enable recurring payments for a membership level, click **Enabled** under **Automatic recurring payments**.

If you chose a specific date rather than the join date for the renewal period, new members will be billed the full membership fee for the period between the join date and the first renewal date. You cannot enable prorating of membership fees for levels with automatic recurring payments.

Limit renewals

You can limit renewals to a single renewal period ahead, and control when members can renew. If you check the **Limit renewal to 1 period ahead** option, then members cannot renew an infinite number of periods into the future. With this option enabled, you can also choose to limit renewals to a certain number of days or months before the membership expires. These options are only available after you select a renewal period (above).

When a member is prevented from renewing because of these limits, a notice informing the member of the next possible renewal date will appear in place of the **Renew** button.



Renewal reminders, actions, and notifications

Renewal reminders and actions take place before the membership is renewed. Renewal notifications are sent once the membership is renewed.

From the **Renewal policy** tab, you can enable the following renewal reminders and actions.

Default time period	Setting	Description
14 days before renewal date	Generate and email invoice	Membership renewal notice will be automatically generated and emailed to active members, and their membership status will be changed to *Pending - Renewal*. Depending on your routing settings, a copy of the email may also be sent to one or more administrators. If the member clicks the **View invoice online** link within the emailed invoice, they will be able to view and pay the invoice online without logging in. Once this option is enabled, the renewal invoice will be emailed **regardless** of the settings on Invoice settings screen. This option is not available for levels with automatic recurring payments.

	Send renewal reminder email 1	You can choose to send the reminder email to the member and/or organization contact. To modify the reminder email, click the **renewal reminder email 1** link.
7 days before renewal date	Send renewal reminder email 2	You can choose to send the reminder email to the member and/or organization contact. To modify the reminder email, click the **renewal reminder email 2** link.
Renewal date	Send renewal day email notice	You can choose to send the renewal day email notice to the member and/or organization contact. To modify the renewal day email notice, click the **renew al day email notice** link.
If not renewed within 7 days	Change renewal period to never	Renewal period for the member will be changed to **Never**. The member will no longer receive any more renewal notices. Typically, you would use this option together with the **Change membership level** option below to move a member who does not renew to a lower or inactive membership level.
	Change membership level to	Membership level for the member will be changed to the level you choose.
	Send grace period email notice	Grace period email notice will be sent to member and/or organization contact. To modify the grace period email notice, click the **grace period email notice** link.
If not renewed within 14 days	Void renewal notice	Membership renewal invoice will be automatically voided for members with a status of *Pending - Renewal* if not fully paid within the specified number of days following the renewal date. The invoice will be voice whether generated automatically or manually. When you enable this option, the **Change status to lapsed** option is automatically enabled as well.
	Change status to lapsed	Membership status of the member will be changed to **Lapsed**. A lapsed member will no longer receive automatic renewal notices, will no longer appear in member directories, and will no longer be allowed to view member only pages, add comments to blog pages, or post or reply to forum topics. For more information, see How membership status affects available functionality. A lapsed member can restore their membership by paying the renewal fee.

	Change renewal period to never	Renewal period for the member will be changed to **Never**. The member will no longer receive any more renewal notices. Typically, you would use this option together with the **Change membership level** option below to move a member who does not renew to a lower or inactive membership level.
	Change membership level	Membership level for the member will be changed to the level you choose.
	Suspend membership	Suspend the member, converting them to a non-member contact. Membership details will be remembered, and the membership can be resumed by an administrator. For more information, see Suspending a membership.
	Archive record	Archive the member's record. Archived members will no longer receive email blasts (including event announcements) or renewal notices.
	Send lapsed email notice	Lapsed email notice will be sent to member and/or organization contact. To modify the grace period email notice, click the **lapsed email notice** link.

You can also control who receives the following renewal notifications. In each case, you can send the notification to the member and/or your organization contact. For bundle levels, you can choose to send them to the bundle member, bundle administrator, and/or organization contact.

Notification	Description
Renewal pending email	Sent when a renewal invoice has been automatically generated by the system or manually generated by the administrator, or when the member has already started the renewal but has not completed the payment.
Renewal confirmed email	Sent after renewal was paid or confirmed manually by administrator.
Credit card expiry notification	Sent two weeks before and on date of credit card expiry. Applies only to Stripe, Authorize.Net, Moneris, and Payflow Pro payment gateways.
Recurring renewal failed email	Sent when online payment for renewing a recurring membership fails.

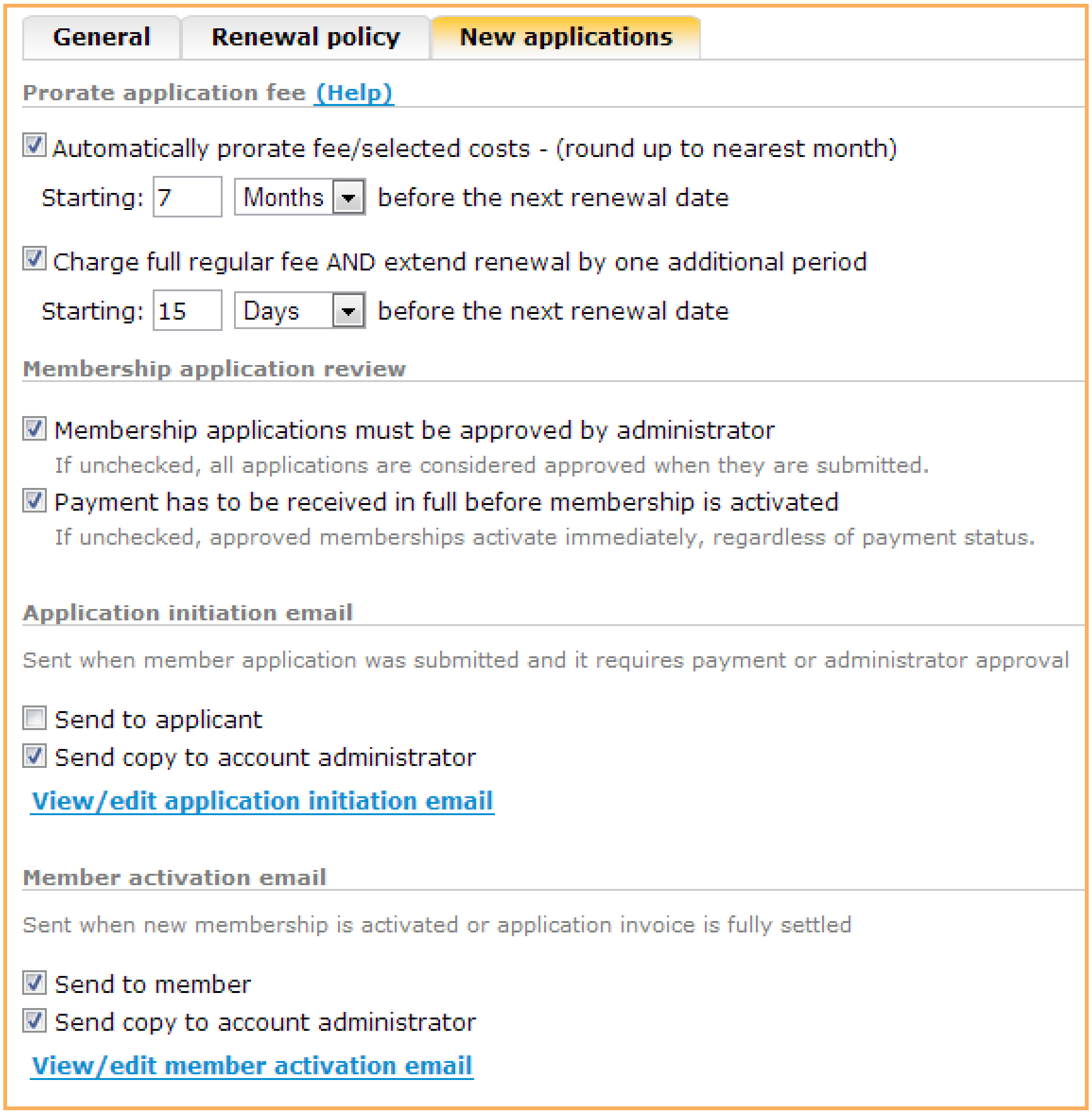
When you create a membership level, the renewal reminder emails are copied from the default membership emails. You can customize the default membership emails or modify reminder emails for individual membership levels.

New applications

From the **New applications** tab, you decide how you want handle new applications.

Read more/less

You can provide for various emails to be sent and actions to take place when someone submits a membership application.



In some cases, you may want to review the application first to see if it meets certain minimum requirements. If you want applications to be automatically approved and activated, disable the **Membership applications must be approved by administrator** option. You also have the option to automatically approve and activate the membership before payment is received in full. If you choose to require administrator approval and/or receipt of payment, then applications will remain in **Pending - New** status until the application is approved and/or payment is received in full.

For membership levels that use a specific renewal date – rather than the join date – you can *prorate* or adjust the membership fee when members join part-way through the membership period. Instead of charging members the full membership fee for an abbreviated membership period, you can choose to pro-rate the membership fee or charge the full fee and extend the membership into the next renewal period. For example, if your annual membership fee is $120 and your memberships renew on January 1st, and someone joins on June 10th, Wild Apricot can automatically adjust their membership fee to $70. Alternately, you choose to charge the full fee and extend the membership through to the end of the next year. For more information, see Prorating membership dues for new applications.

Deleting membership levels

To delete a membership level, click it within the membership level list then click the **Delete** button. You will be prompted to confirm your intention to delete the level.

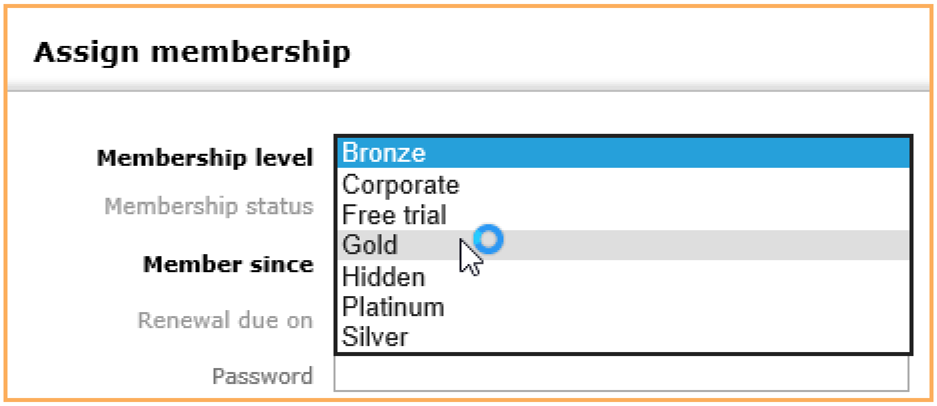
> You cannot delete a membership level if members are currently assigned to it. Also, you cannot delete a membership level if it is the last remaining level set up for your site.

Assigning membership levels by administrator

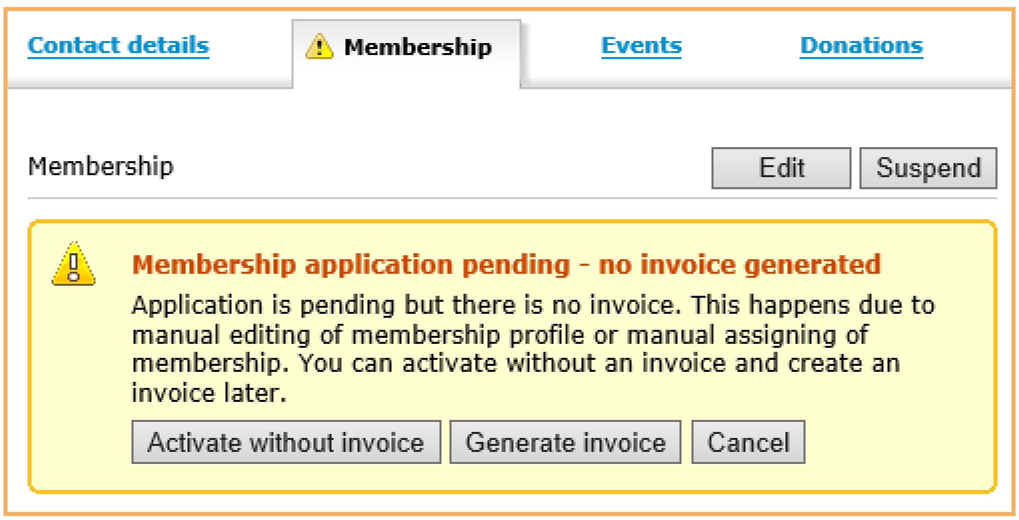
To assign a contact to a membership level, go to their contact record and click the **Membership** tab.

Read more/less

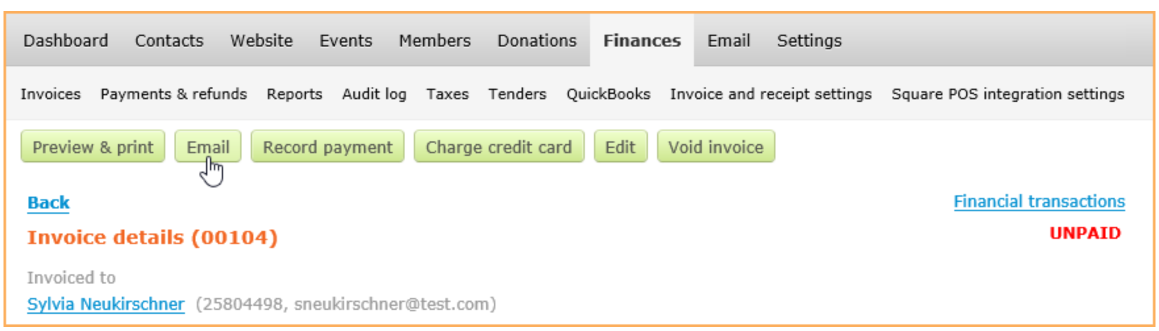
Within the Membership tab, click the **Assign membership** button then select a level from the **Membership level** list.



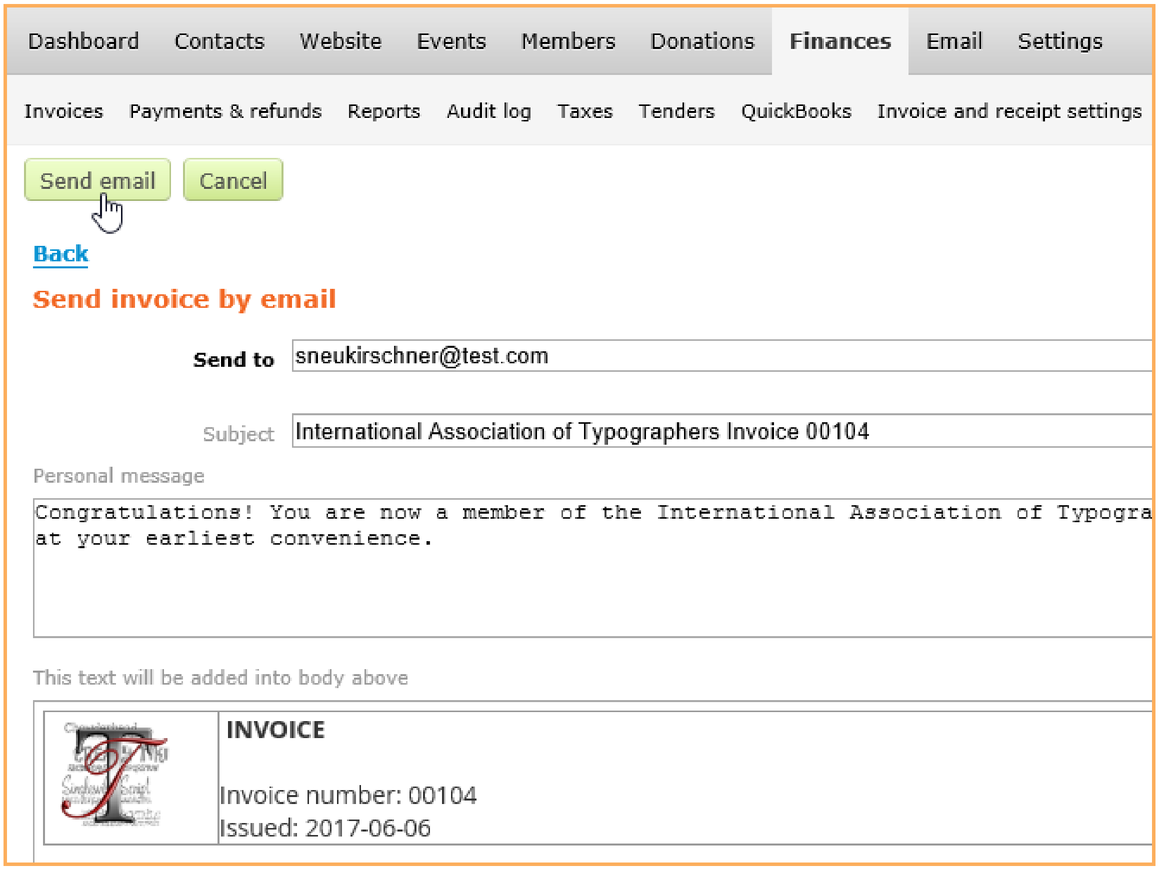
After you save your changes, you will be given the choice of generating an invoice or activating the membership without generating an invoice.



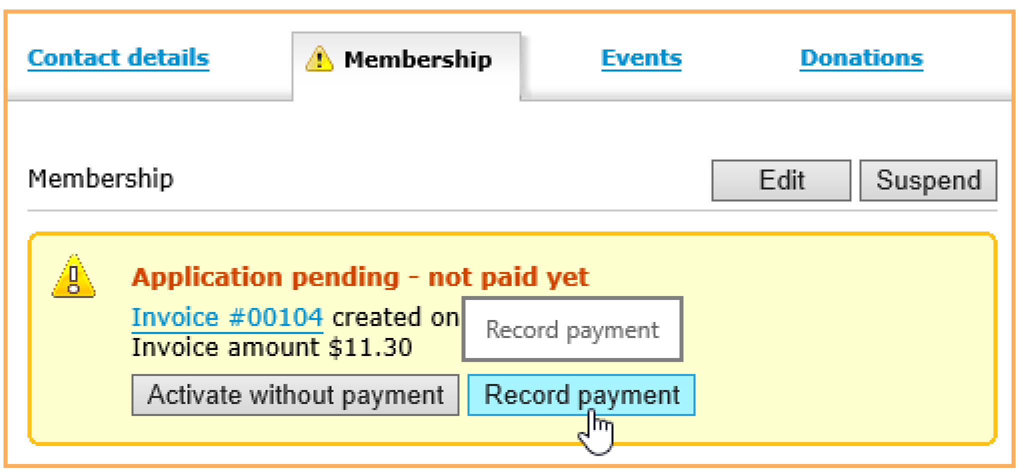
If you choose to generate an invoice, you can email the invoice to the new member after you've saved it...



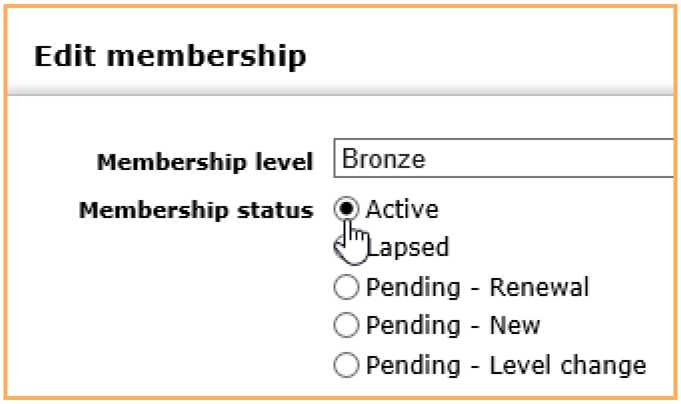
...and include a message in the email informing the member of their new status and the outstanding membership fee.



If you've already received payment, you can click the **Record payment** button from the Membership tab – after generating and saving the invoice – to record the payment.



Once you've recorded the payment – or activated the membership without payment – the member activation email will be sent. If you want to activate the membership without payment, and without sending an activation email, you can click the **Edit** button on the Membership tab and change the **Membership status** to **Active**.



You will continue to be alerted to the outstanding invoice, unless you void or delete the membership invoice.

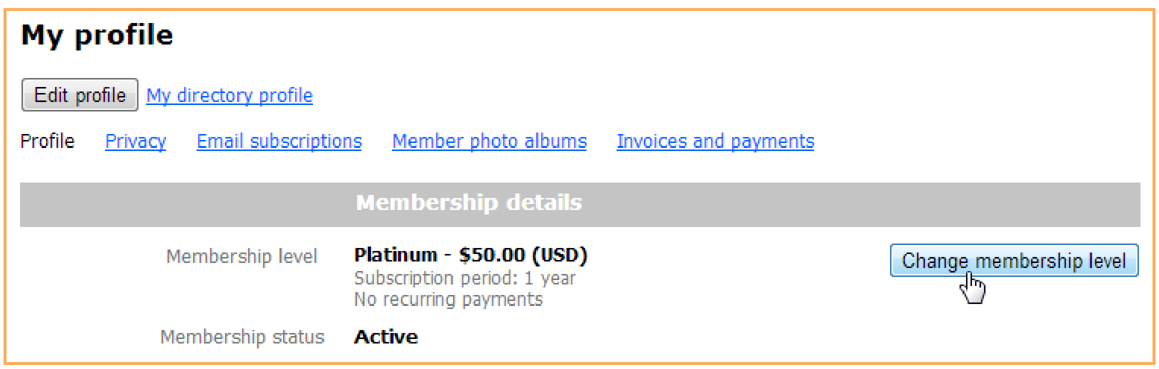
You can also use this approach to switch an existing member to a different membership level. Members will be billed the full membership fee for the new level. The next renewal date will be calculated based on new level settings.

To change membership levels for multiple members at the same time, you can export your contact records to a spreadsheet, change the levels within the spreadsheet, then import the revised spreadsheet into Wild Apricot. For more information, see Bulk changes using import and export.

Switching membership levels by member

If you enabled the **Member can change to** option on the General tab for their current membership level, members can switch to a different membership level from their member profile.

Read more/less



> ⚠ Members who switch levels will be billed the full membership fee for the new level. The next renewal date will be calculated based on new level settings and payment date.

Restricting by membership level

You can limit access to pages, events, event registration types, and custom membership fields by membership levels. Inclusion in a member directory can also be restricted by membership level.

Restricting page access by membership level

You can restrict page access to selected membership levels so that only members at those levels can view the page, either through the site menu or via a direct link (URL).

Read more/less

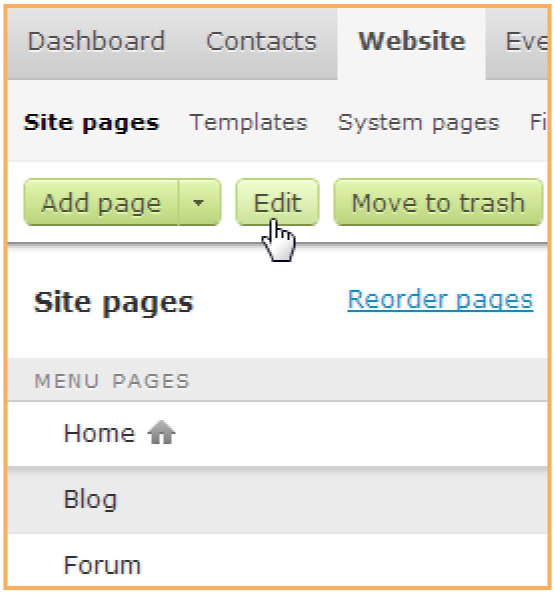
To restrict page access to selected membership level, follow these steps:

1. Hover over the **Website** menu and click the **Site pages** option that appears.
2. Within the site page list, click the page that you want to restrict access to.

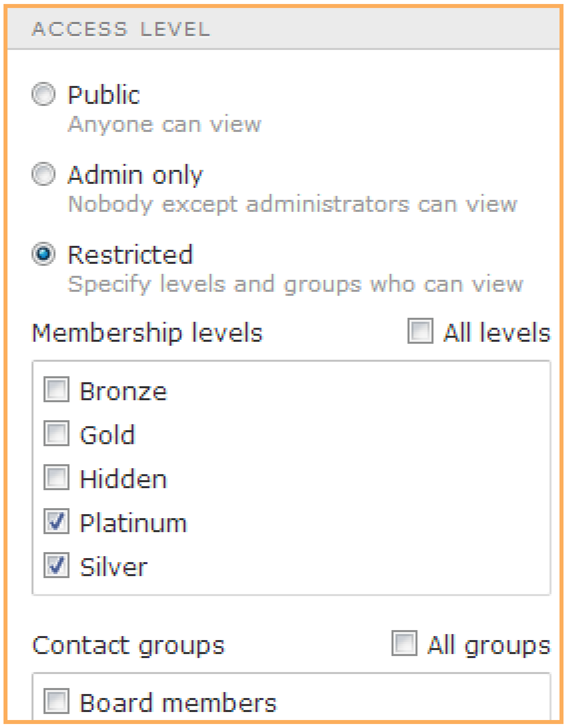
> ⚠ If the page you want to select is grouped under another page, you may have to click the plus sign beside the parent

page to display its subpages.

3. Click the **Edit** button towards the top of the screen.



4. Within the **Access level** options that appear in the page settings on the left, click the **Restricted** option.
5. Choose the member levels – and optionally, membership groups – that can view the page.



If you restrict access by both membership levels and membership groups, then members who belong to any of the selected levels **or** groups will be able to access the page. If you check the **All levels** or **All groups** option then all levels or groups – including any levels or groups added in the future – will be selected.

6. Click the **Save** button to save your changes.

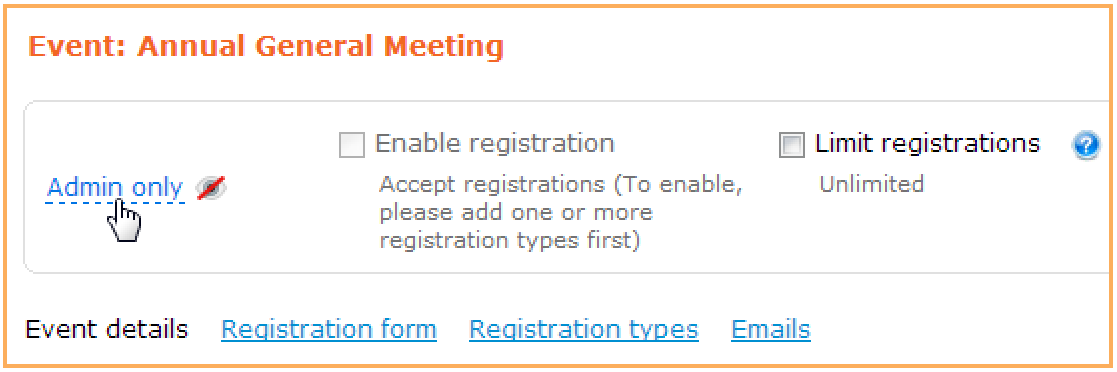
For more information, see Page access and visibility.

Restricting events by membership level

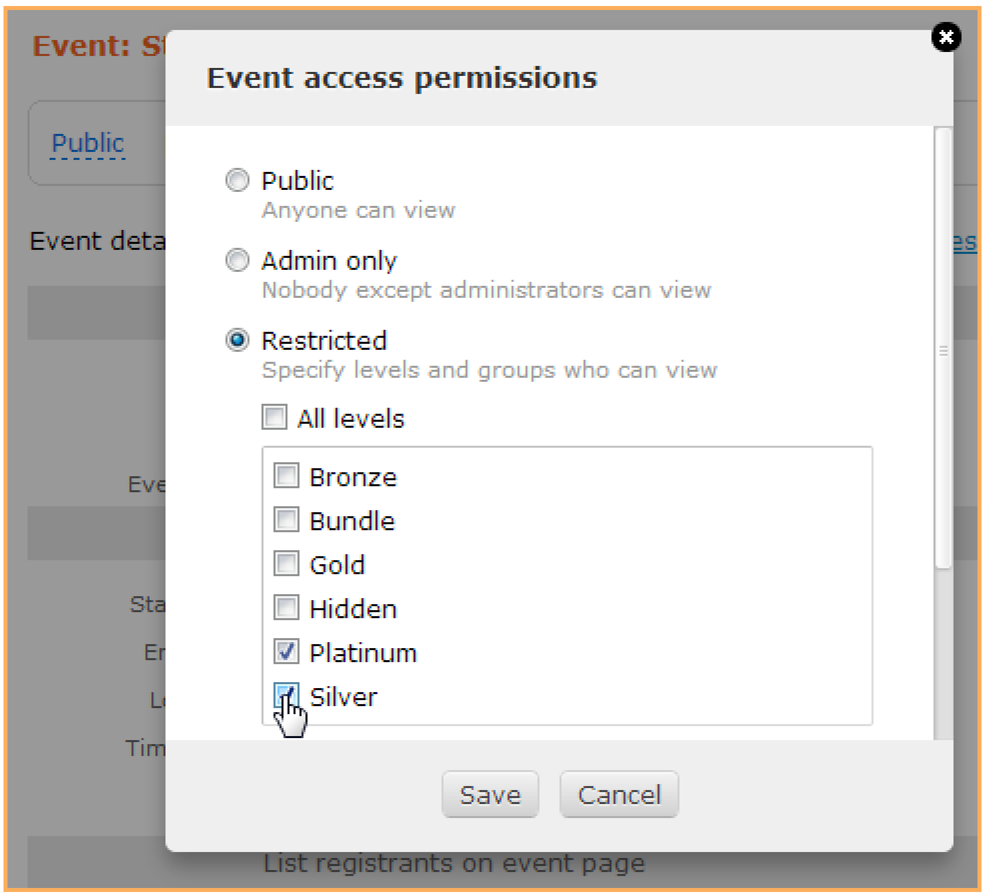
To restrict access to an event by membership level, follow these steps:

Read more/less

1. Hover over the **Events** menu and select the **Event list** option.
2. Select the event within the list.
3. Within the event details, click the **Admin only** or **Public** link towards the top.



4. Within the dialog that appears, click the **Restricted** option.
5. Check each of the membership levels – and optionally, membership groups – you want to grant access to.



6. Click **Save** to save your choices.
7. Click **Save** to save the changes to your event.

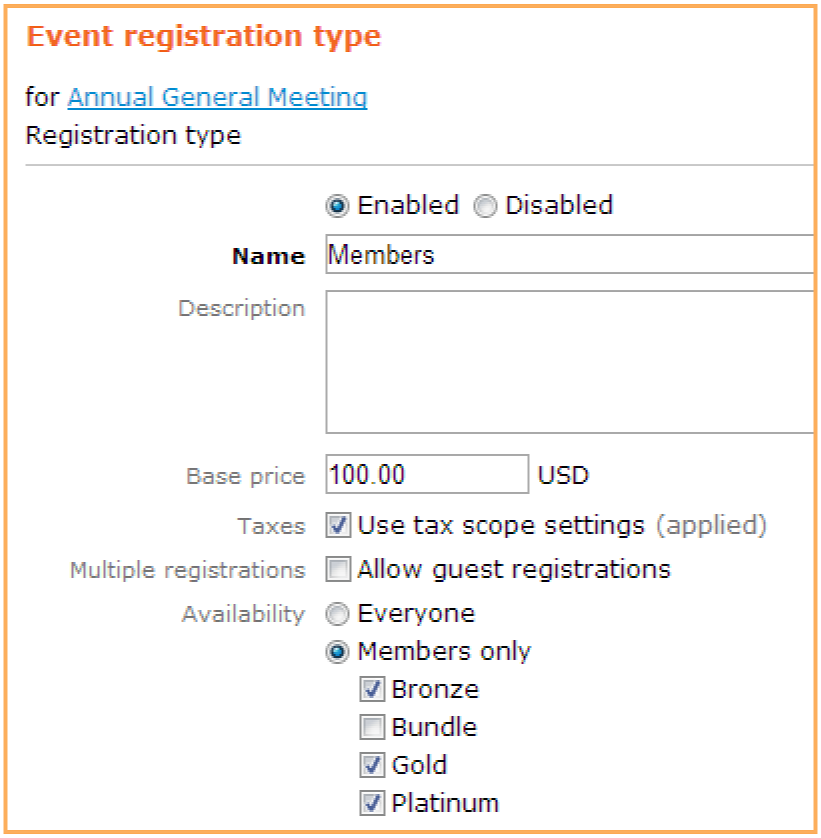
Restricting event registration types by membership level

To restrict an event registration type to certain membership levels, follow these steps:

Read more/less

1. Hover over the **Events** menu and select the **Event list** option.
2. Select the event within the list.
3. Click **Registration types**.

4. Click the registration type you want to restrict.
5. Click the **Edit** button.
6. Under **Availability**, click **Members only** and check the membership levels you want to limit this event registration type to.



7. Click **Save**.

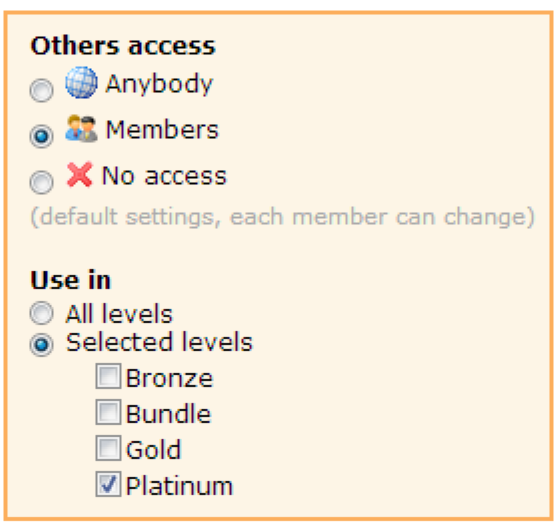
Restricting membership fields by membership level

You can control whether the membership fields you create will apply to all membership levels or just to the ones you select.

Read more/less

To limit membership fields to selected membership levels, follow these steps:

1. Hover over the **Members** menu and select the **Membership fields** option.
2. Click the field you want to restrict.
3. Under **Use in**, click **Selected levels** then check the membership levels you want to limit this field to.



4. Click **Save all changes**.

Restricting a member directory by membership level

You can limit a member directory to displaying only members at selected membership levels.

Read more/less

To do so, follow these steps:

1. Hover over the **Website** menu and select the **Site pages** option.
2. Begin editing the page where the member directory appears.
3. Hover over the member directory gadget and click the **Settings** icon.

4. Within the gadget settings panel on the left, choose from the following options under **Members to include**:

Option	Description
All members	Include all members.
From saved search	Use a saved member search to limit members to those that match the saved search criteria. When you choose this option, you can choose from a list of your saved member searches. This option will only appear if you have a saved member search. The ability to save searches is restricted to Community plans and above.
Selected levels	Restrict the list to members at selected membership levels. When you click this option, you can choose one or more membership levels to be included in the directory.
Show bundle administrator only	Indicates whether to include only bundle administrators and exclude individual members of bundles. The profiles of individual bundle members will still be accessible from the bundle administrator's profile even if individual members are excluded.

5. Click **Save**.

Whether a member appears in the directory also depends on that member's privacy settings.

On this page:

member
- Restricting by membership level
    - Restricting page access by membership level
    - Restricting events by membership level
    - Restricting event registration types by membership level
    - Restricting membership fields by membership level
    - Restricting a member directory by membership level

Expand all sections

See also:

- Membership bundles
- Membership application form
- Member - renew or change level
- Membership renewal settings
- Prorating membership dues for new applications
- Recurring payments
- Discounts and complimentary transactions
- Customizing default membership emails

Recording payments and approving applications

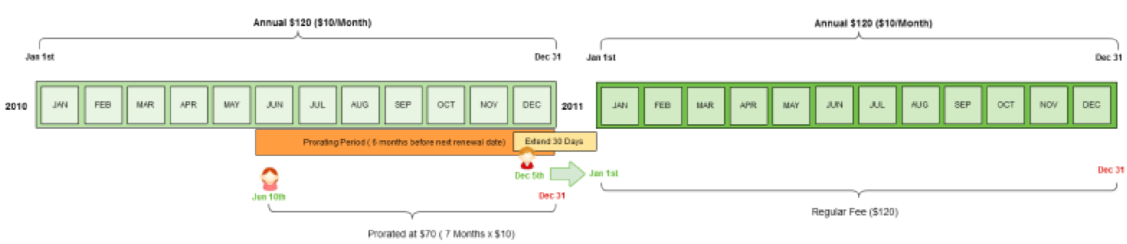
Redirection Notice
This page will redirect to Activating and approving memberships.

Prorating membership dues for new applications

Prorating membership dues for new applications

For membership levels that use a specific renewal date – rather than the join date – you can *prorate* or adjust the membership fee when members join part-way through the membership period. Instead of charging members the full membership fee for an abbreviated membership period, you can charge a reduced fee, or charge the full fee and extend the membership into the next renewal period.

For example, if your annual membership fee is $120 and your memberships renew on January 1st, and someone joins on June 10th, Wild Apricot can automatically adjust their membership fee to $70. Alternately, you choose to charge the full fee and extend the membership through to the end of the next year.

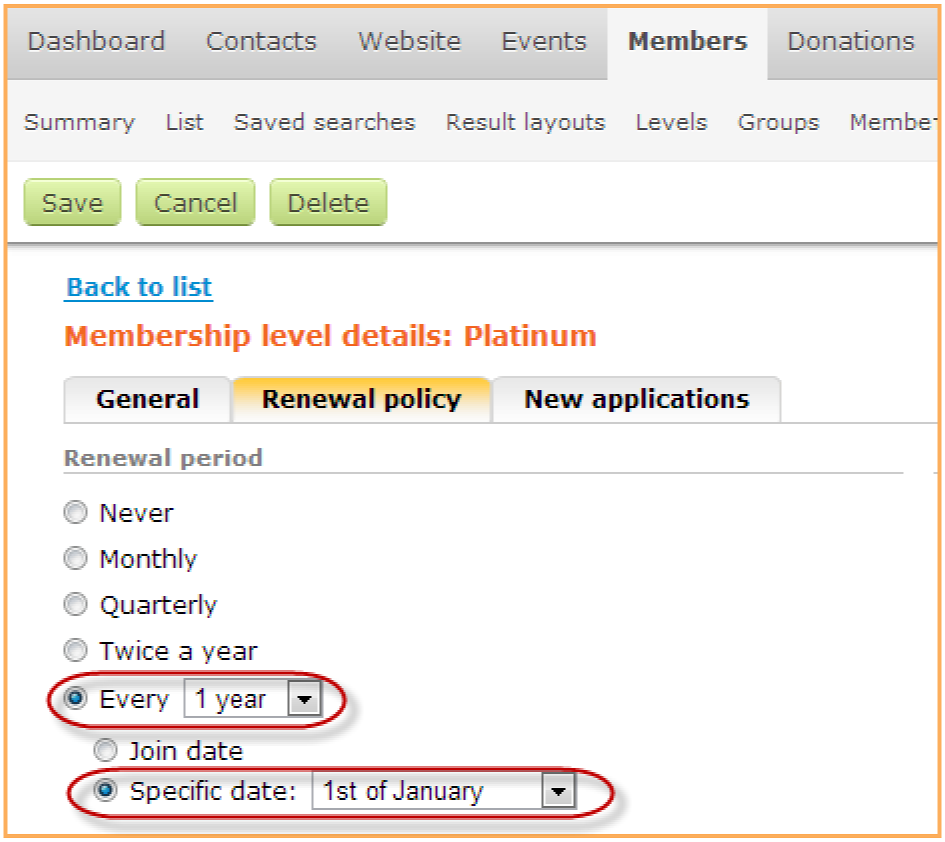


You can also choose whether to prorate extra membership costs.

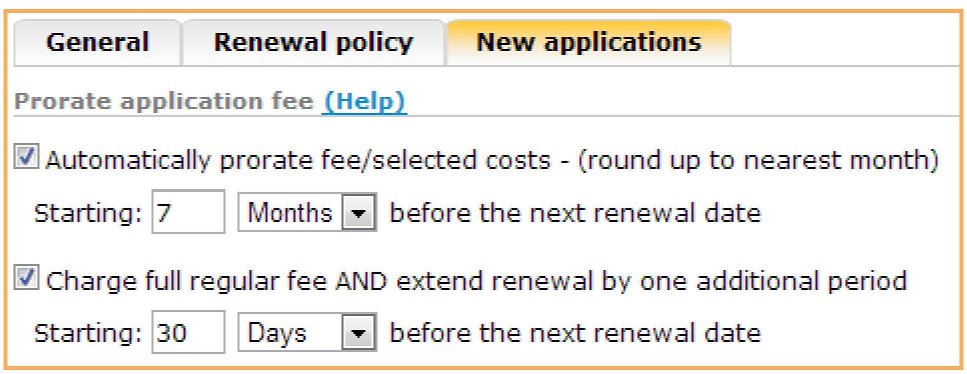
Applying prorating to membership levels

To apply automatic prorating, a membership level must use a specific date for their **Renewal period**. If the level has recurring payments enabled, prorating can only be applied if you're using Authorize.Net, Moneris, or Stripe as your payment system.

Read more/less



To active prorating for a membership level, click the **New applications** tab within the membership level details.



The following prorating options are available:

- **Automatically prorate fee/selected costs - (round up to nearest day/month)** – Define when membership application fees should begin being prorated. This can be set using either days or months for annual renewals, and just days for monthly renewals. For example, if you enable this option and set it to 7 months, and your membership period begins on January 1st, then applications received beginning on June 1st – 7 months before January 1 – will be prorated. Applications received between January 1 and June 1st will not be pro-rated.
- **Charge full regular fee AND extend renewal by one additional period** – Any application submitted in this time frame will pay the full membership fee, but they will not have to renew their membership until the next period after the current one. You can set this time frame using either days or months for annual renewals, and just days for monthly renewals. For example, if you enable this option and set it to 30 days, and your membership period begins on January 1st, then applications received beginning on December 1st – 30 days before January 1 – will be charged the full membership fee but extended to the end of the following year. Applications received between January 1st and December 1st will not be extended.

Prorating examples

Here are a couple of examples to help explain how the prorating settings work.

Automatically prorate fees

Membership level details	Application date	Next renewal date	Calculation
Renewal period: Annual, Specific date: July 1st Membership fee: $120	January 1st, 2015	July 1st, 2016	$120/12 x 6=$60
Renewal period: Every 3 years, Specific date: July 1st Membership fee: $360	January 1st, 2015	July 1st, 2018	$360/36 x 30=$300

Charge full fee and extend renewal

Assumption: application has been submitted within the specified date window before the renewal date.

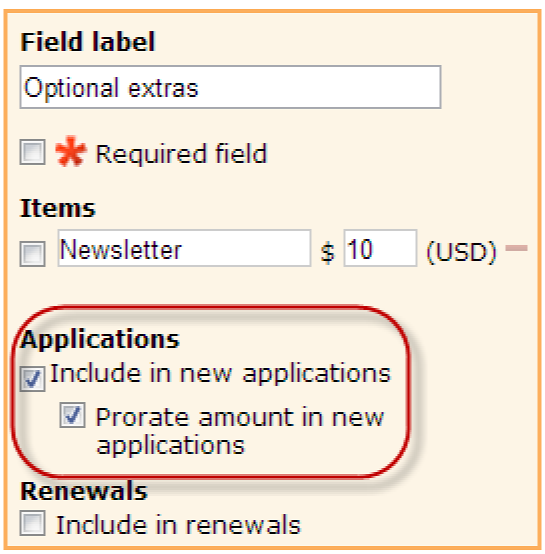
Membership level details	Application date	Normal renewal date	Extended renewal date
Renewal period: Annual, Specific date: July 1st	January 1st, 2015	July 1st, 2016	July 1st, 2017
Renewal period: Every 3 years, Specific date: July 1st	January 1st, 2015	July 1st, 2018	July 1st, 2021

Prorating extra cost fields

For each extra membership cost field , you can define whether it should be prorated as well.

Read more/less

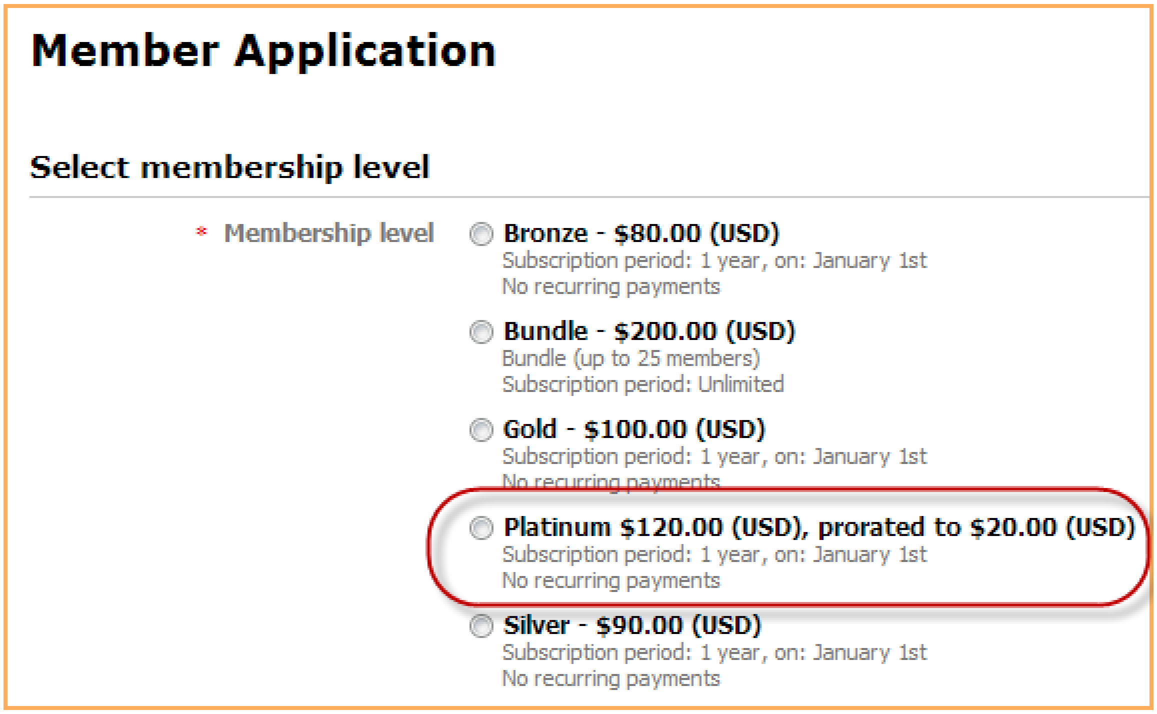
For example, if new members can get a branded t-shirt with their membership, you probably wouldn't want to pro-rate that cost, since they'd get the t-shirt whether their first membership period is full 12 months or just 7 months. On the other hand, if you use an extra cost field for monthly newsletters, you might want to prorate the fee.



Prorating on the membership application form

When applying for a membership level whose fee or extra cost is being prorated, the applicant is notified of the prorated cost when selecting their level, as well as on each screen of the application process.

Read more/less



Prorating on invoices and receipts

Application fees and costs which have been prorated are shown on the invoice.

Read more/less

There will be a line which details the full fee or extra cost, and then a line where this is prorated via a discount.

There is an outside chance that the prorating might lead to a fee that is zero, or so close to it as to essentially be free. Please note that to avoid this and the complications that can arise from it, **all prorated amounts are always rounded up to 0.01**.

Manually adding a member to a prorated level

If a membership level has a prorating period set up and the administrator either:

- Creates a member for that level, or
- Changes a member's membership level and sets their status to Pending-New

The following will happen:

1. The application will be pro-rated according to the rules that have been defined (but selected extra charges will **not** be pro-rated).
2. There will be no "Prorated" label applied to this transaction on the Transaction list.

The **Charge full regular fee AND extend renewal by one additional period** setting will work as described if the renewal date is left empty. After changing status from Pending-New to Active renewal date will be set to the next period.

On this page:

Expand all sections

Renewal date calculation

Renewal date calculation

A member's next renewal date is calculated differently depending on whether the member is applying for a new membership or renewing an existing membership.

For new memberships

The renewal date for a new membership is set when the new member's status become **Active** – which occurs when membership application with online payment was automatically confirmed and recorded or when administrator activates member manually – and is calculated according to the membership level's renewal policy – specifically its renewal period and renewal date.

Read more/less

The renewal date can be a specific date or the member's join date (which appears on their contact record as the **Member since** date).

Examples

Membership becomes active on...	Renewal period	Level renewal date	Next member renewal date
September 15, 2015	Monthly	Join date	October 15, 2015
		Specific date: 1st	October 1, 2015
	Every 1 year	Join date	September 15, 2016
		Specific date: January 1st	January 1, 2016
	Every 3 years	Join date	September 15, 2018
		Specific date: January 1st	January 1, 2018

When the level's renewal date is set to a specific date, you can apply prorating so that fees are adjusted to reflect the abbreviated period before the member's next renewal date. For more information, see Prorating membership dues for new applications.

For membership renewals

The next renewal date for a member renewing their membership depends on their status, their membership level's renewal policy, and the date of renewal relative to their current renewal date.

Read more/less

Examples

Members renews on...	Status	Level renewal policy	Member's current renewal date	Member's new renewal date	Notes
March 15, 2015	Active	Annual, Join date	March 21, 2015	March 21, 2016	Normal situation – member is renewing a few days in advance
	Active	Annual, Join date	March 11, 2015	March 11, 2016	Member was a few days late, but his record was still kept in Active status
	Lapsed	Annual, Join date	February 1, 2015	March 15, 2016	This member was already in Lapsed status (due to manual admin editing or via automated renewal actions), thus system calculated his new renewal date from today's date (effectively it became his rejoining date)

Active	Annual, Join date	October 1, 2013	October 1, 2014	This is an unusual scenario – the member's renewal date is well overdue but member status is still Active, so system assumes that member kept full use of membership benefits and this applied his renewal payment to backdate from the renewal date in the past. Thus, even after renewal, his renewal date is still in the past and he should renew again to catch up on payments. If you do not want this to happen, make sure that your members who fail to renew do not stay in Active status
Lapsed	Annual, Join date	Never	March 15, 2016	Lapsed member can renew from today's date according to current level renewal policy, even if his previous renewal date was reset to Never.
Active	Annual, Specific date: July 1st	December 10, 2015	July 1, 2016	This is a bit of an unusual case: 1) For some reason, member's renewal date did not match level policy e.g. you changed level renewal policy afterwards, or member record was manually edited / imported. As a result member is not renewed for the full year. 2) Member is also renewing far in advance of his renewal due date

	Lapsed	Annual, Specific date: July 1st	August 10, 2013	July 1, 2015	Member is renewed for less than 4 months in this case. Note that system will not jump to 2016 in this case, it only uses the nearest member level date.

> Whenever your membership level renews on a specific date, check that renewal due date (day and month only) of individual members in this level matches that specific date. If these dates differ then member will not be renewed for the full period.
> For example, if the level is set up with an annual period and a specific date of July 15th, you have to make sure that members renewal date are also set to July 15th (the difference can happen due to member records imported with certain renewal dates or due to manual editing of records by administrators

Member can renew their membership via email or from their member profile your Wild Apricot site. For more information, see Member - renew or change level. Only members with status of **Active** or **Lapsed** can renew their memberships.

> Renewals are handled differently for members with automatic recurring payments and for bundle members. For more information, see Recurring payments and Membership bundles.

For member level changes

When switching to a different membership level, the next renewal date will be calculated based on new level settings and payment date.

> The full price of the new membership term will be billed. There is currently no pro-rating based on the previous membership level.

If you want your members to have an option to switch to another level make sure that **Level security options** are set up to allow members to switch to other levels. For more information, see Membership levels.

On this page:

- For new memberships
- For membership renewals
- For member level changes

Expand all sections

See also:

- Membership levels
- Membership bundles
- Recurring payments
- Import Guide
- Adding member records manually

Activating and approving memberships

Activating and approving memberships

In Wild Apricot, you can allow for memberships to be automatically activated once the applicant submits the membership application form, or you can make them conditional upon receipt of payment and/or approval by an administrator. If you make membership conditional upon approval or receipt of payment, the membership application will be reviewed – by the system for payment and by an administrator for approval – before it is activated. You can enable membership application review separately for each membership level, so that only certain levels require administrator approval or payment in advance.

> If you've set up membership bundles and enabled administrator approval, only the bundle administrator will need approval. Bundles

members will be managed by the bundle administrator.

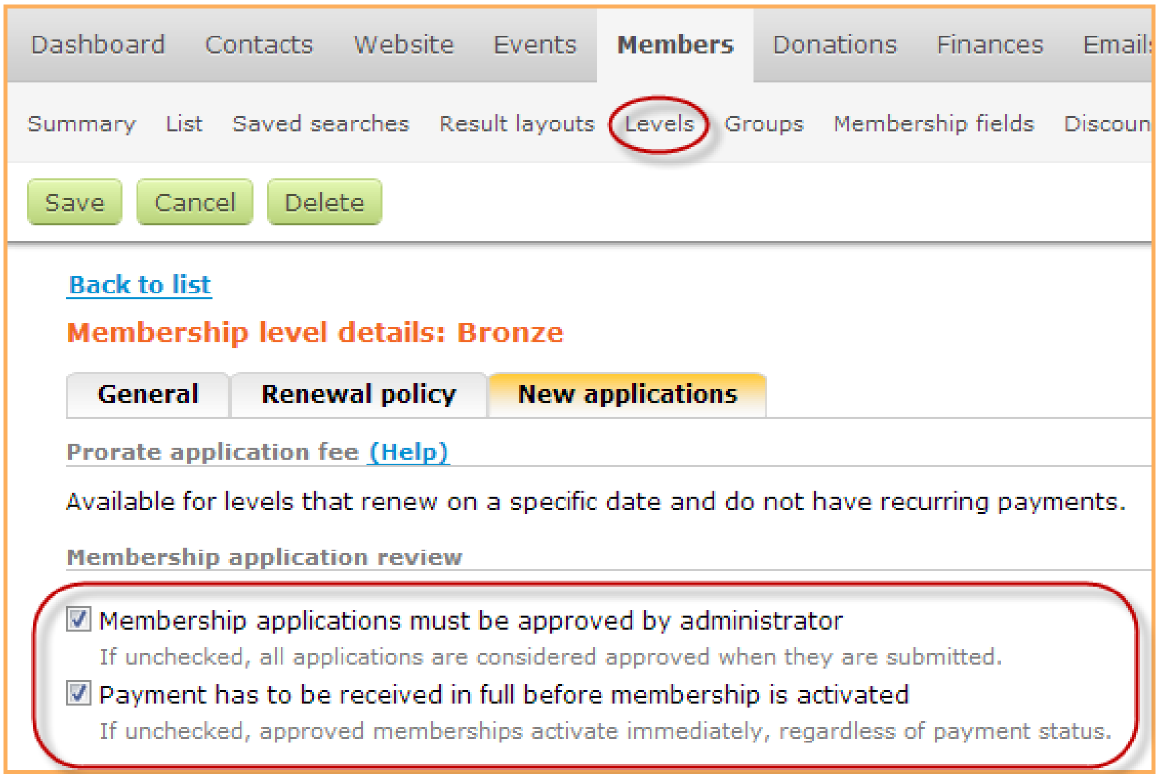
Until a membership is activated, new members are not able to register for events using member-only registration types.

Requiring payment or approval before activating memberships

To require fee payment or administrator approval before activating a membership, follow these steps:

Read more/less

1. Hover over the **Members** menu and select the **Levels** option.
2. Click the membership level you want to set up application review for.
3. Click the **New applications** tab.
4. If you want membership applications for this level to reviewed and approved by an administrator, check the **Membership applications must be approved by an administrator** option. If you want membership applications for this level to be conditional upon payment being reviewed, check the **Payment has to be received in full before membership is activated** opti on.



5. When you are finished choosing your application review options, and other new application options, click the **Save** button.

If you enable both application review options, the system will check first whether the payment has been reviewed before displaying alerts regarding the need for administrator approval.

> ⚠ If you want visitors to be able to join as a member and immediately take advantage of member-only registration types, you must leave both these options unchecked.

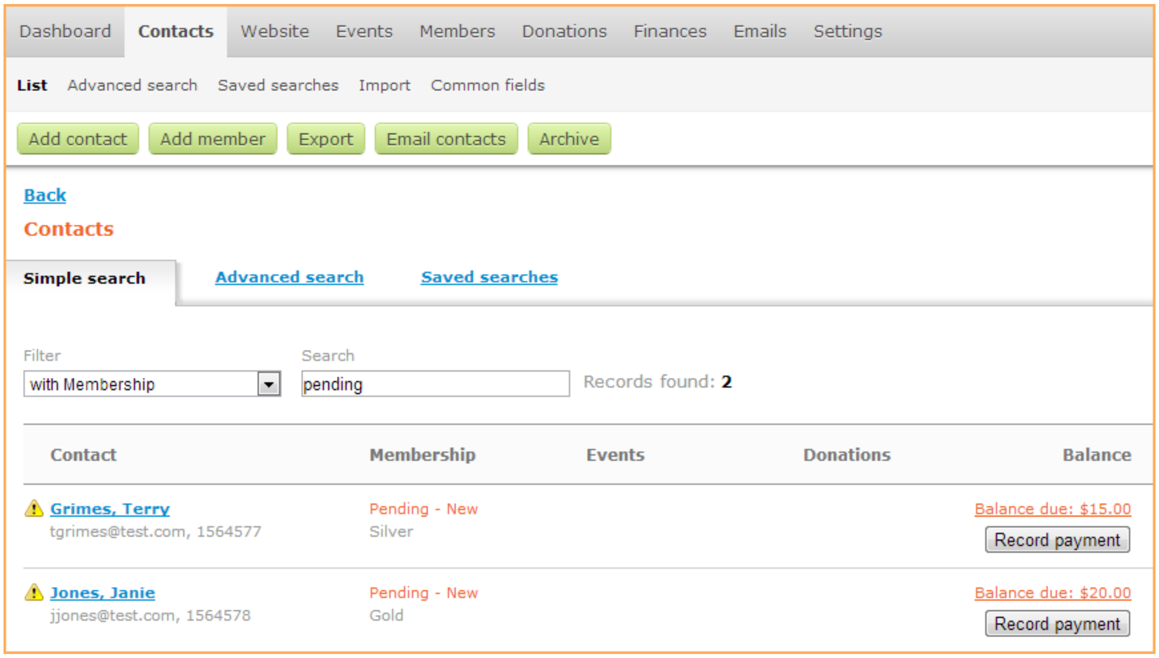
Recording payments

Payments are automatically recorded for online payments, and can be entered manually for other forms of payment (e.g. cash, check). For more information, see Payments - Overview . When an online payment is completed, it is automatically settled with the corresponding invoice. For manual payments, the administrator must settle the payment to the invoice manually.

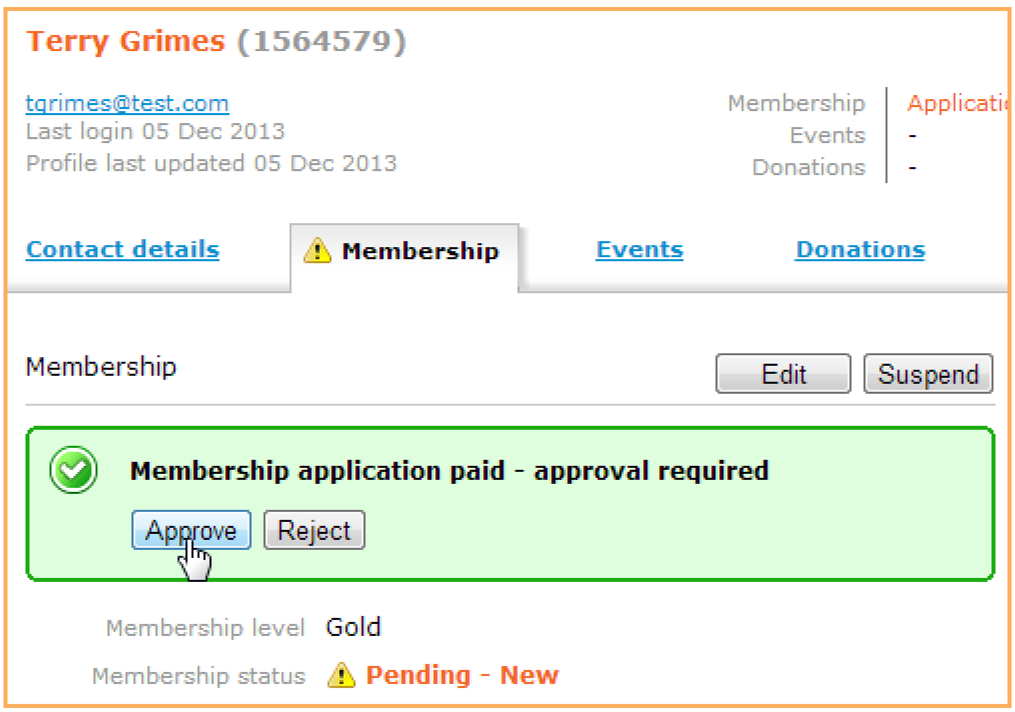
Approving applications

If administrator approval is required, the membership status of the applicant is marked as *Pending - New* . You can search for members with this status by performing a keyword search for the *pending* from either your contact list or member list.

Read more/less



To approve a new member, open their contact record and go to the **Membership** tab. From there, you can click the **Approve** or **Reject** b utton.



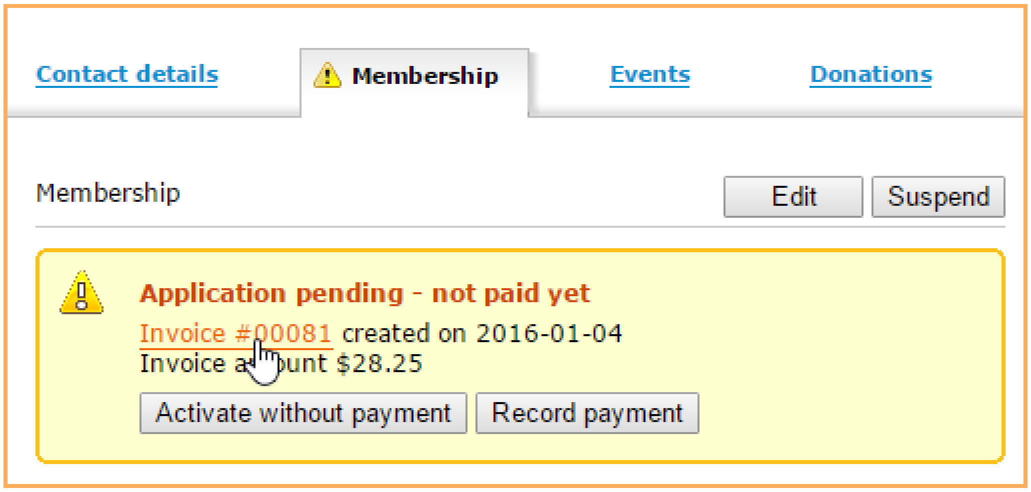
Records of rejected members remain in the system as contacts. For instructions on deleting contacts, see Deleting and archiving member and contact records.

After approval, the membership status is set to active. For information on membership statuses, see How membership status affects available functionality. Depending on your membership level settings, a membership activation email may be sent to the new member and to administrator.

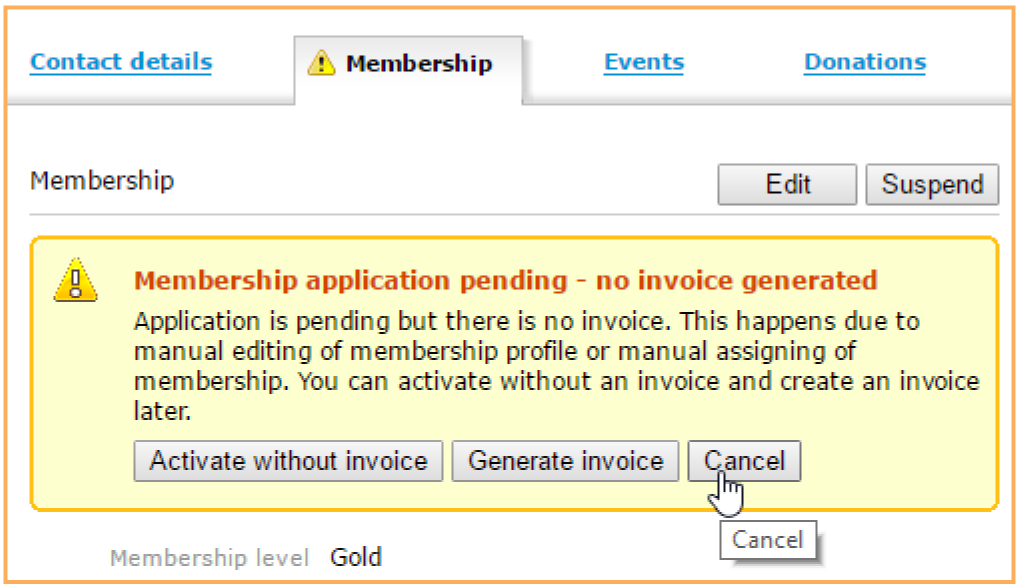
Canceling a pending unpaid membership application

If you want to delete a pending member application for someone who hasn't paid the membership fee, follow these steps:

1. Go to the contact's **Membership** tab.
2. Click the invoice number within the pending notice to display the invoice details.



3. From the invoice details, click the **Delete invoice** button. You will be asked to confirm the deletion.
4. After you confirm the deletion, you are returned to the contact's **Membership** tab where an option now appears to cancel the application. From here, click the **Cancel** button.



The membership application is now deleted, and the applicant is now a non-member contact without any membership history.

On this page:

Expand all sections

See also:

- Recording payments and credits,

- and settling invoices
- Refunds
- Adjusting or canceling a payment or refund
- Failed online payments
- Issuing manual invoices

Membership bundles

Membership bundles

What is a bundle?

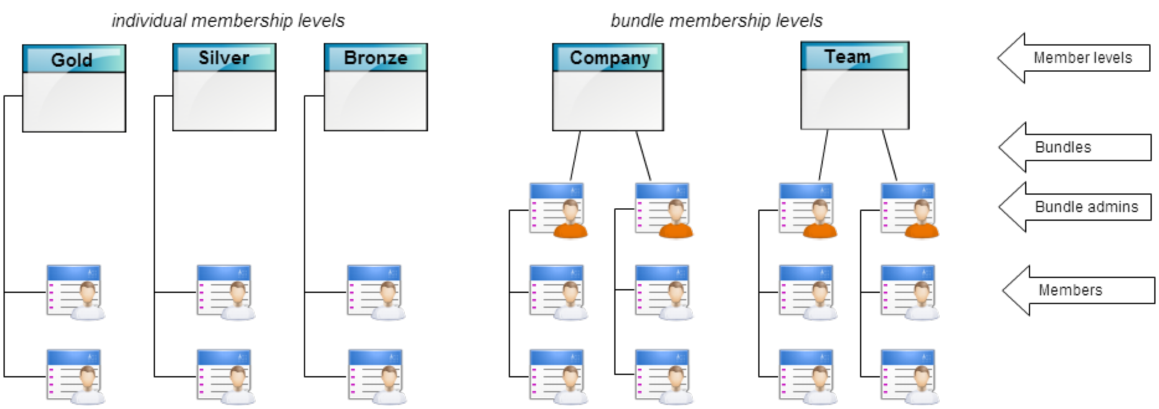
A membership bundle is a collection of members who are linked together and managed by one of their members – the bundle administrator.

Read more/less

Bundle members share the same renewal date, status, and membership level. The entire bundle is charged a single membership fee, which is paid by the bundle administrator. Bundles can be used to offer a discounted group membership to companies, teams, or families.

> Membership bundles are separate and distinct from member groups.

You can set up as many different bundle membership levels as you want. Within each bundle level, visitors to your site can create separate bundles. Simply by applying to that level, a visitor creates a new bundle and becomes the administrator for that bundle. As the bundle administrator, that person is responsible for adding new members to the bundle. The next person who applies to the bundle membership level creates another bundle and can add members to their bundle.



In the above example, there are two bundle membership levels (Company and Team) with two bundles in each (two different companies and two different teams).

> Individual membership bundles are not given names but are represented by the names of their bundle administrators.

For each bundle membership level, you can set a limit on the number of members that can be added. The membership fee for the bundle level will be applied to each bundle that is created, and will be invoiced to the bundle administrator. Only the bundle administrator can pay or renew on behalf of the entire bundle.

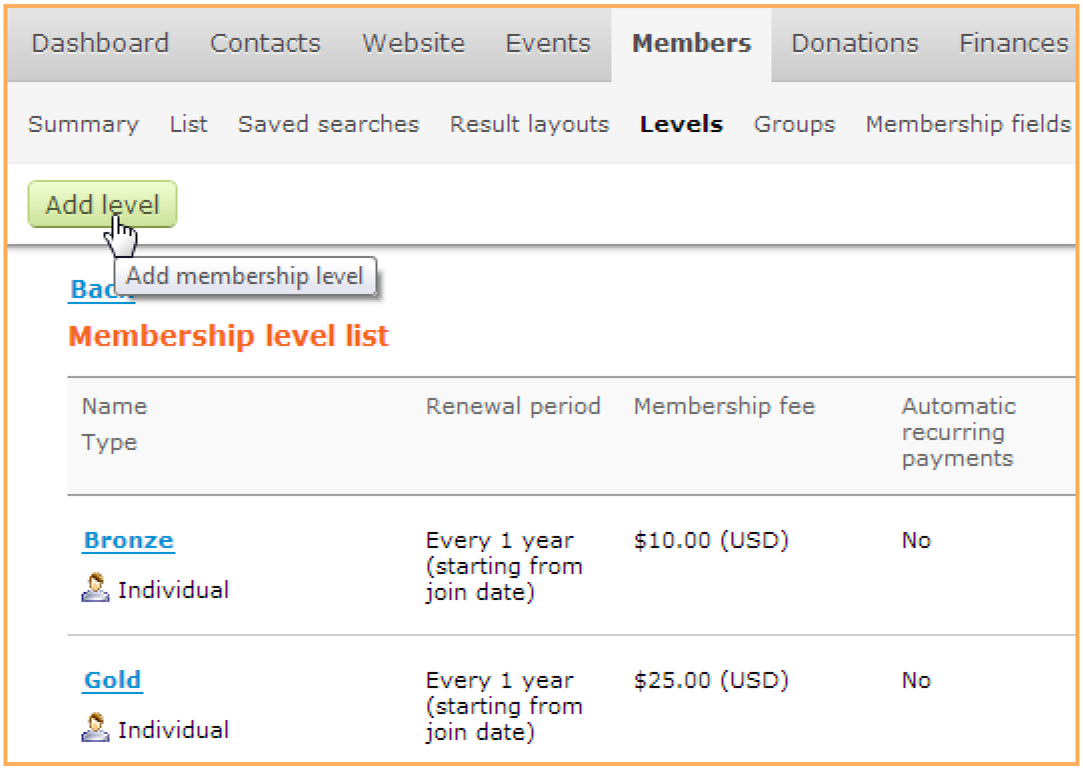
Creating a bundle membership level

To allow visitors to your site to create membership bundles, you must first create one or more bundle membership levels.

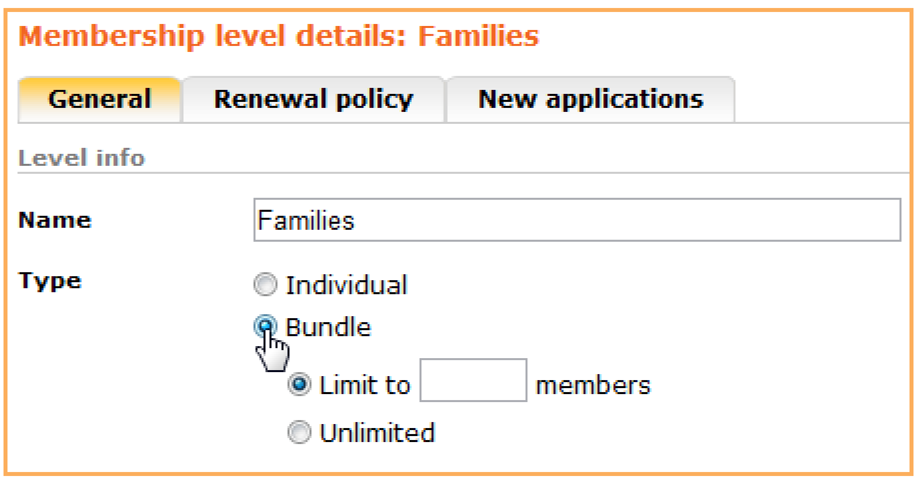
Read more/less

To create a bundle membership level, follow these steps:

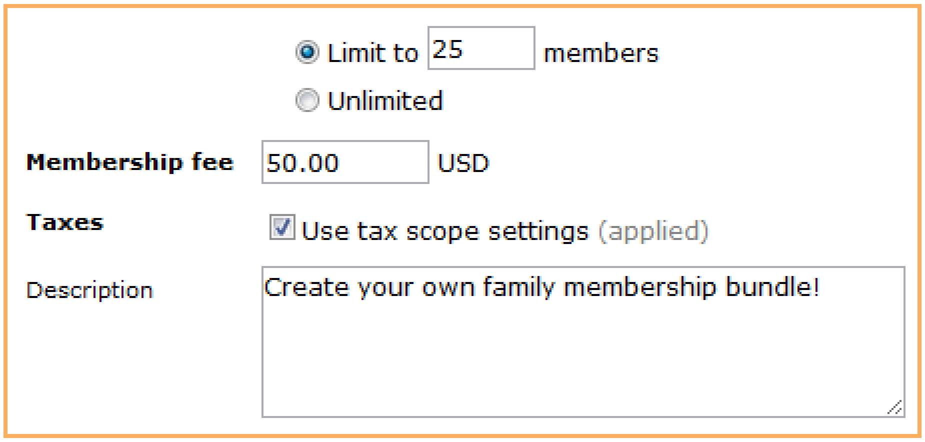
1. Hover over the **Members** menu and click the **Levels** option.
2. From the membership level list, click **Add level**.



3. Enter the name of the bundle membership level (e.g. Families) in the **Name** field.
4. Beside **Type**, click **Bundle**.



5. If you want to limit each bundle to a certain number of members, enter the number in the **Limit to *x* Members** field. Otherwise, click the **Unlimited** option. Note that administrators can continue to add members to a bundle – manually or through import – after the limit is reached.
6. Enter a membership fee and choose whether to apply your tax settings to the fee. This amount will be charged for each bundle created using this membership level.
7. Enter a description for the bundle level. The description will appear below the membership level details on the membership application form.



8. Click the **Renewal policy** tab and decide on your membership renewal policy. For more information, see Bundle renewal policy (below).
9. Click the **New applications** tab and decide how you want to handle new applications. For more information, see Bundle application settings (below).
10. Click **Save** to finish creating the membership level.

Bundle renewal policy

From the Renewal policy page, you decide on the membership renewal policy for the bundle level.

Read more/less

You can automate the membership renewal process with timed reminders and actions. Renewal reminders and actions take place before the bundle is renewed. Renewal notifications are sent once the bundle is renewed.

You can also provide for a membership renewal invoice to be automatically generated and emailed to members a specific number of days before their renewal date. To fully automate the renewal process, you can set up recurring payments.

All bundle members share the same renewal date. While bundle members can also receive renewal reminders and renewal notifications, only the bundle administrator can actually renew on behalf of the entire bundle.

Bundle application settings

From the **New applications** page, you decide how you want handle new applications.

Read more/less

You can provide for various emails to be sent and actions to take place when someone creates or joins a membership bundle.

In some cases, you may want to review the application first to see if it meets certain minimum requirements. If you want applications to be automatically approved and activated, disable the **Membership applications must be approved by administrator** option. You also have the option to automatically approve and activate the membership before payment is received in full.

Creating membership bundles

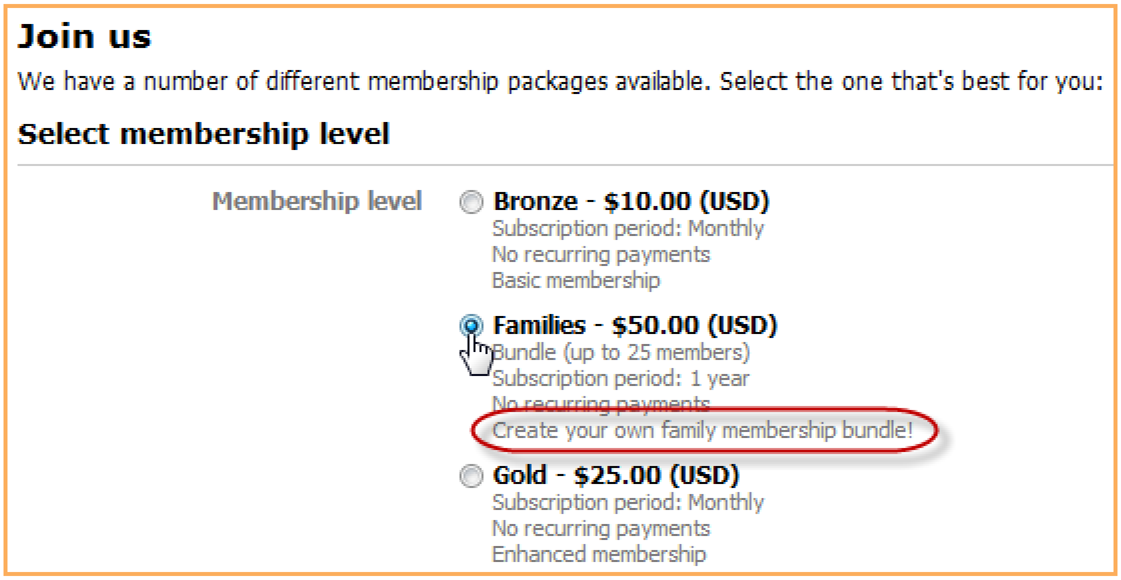
There are three ways in which a new membership bundle can be created:

- through membership application
- by a site administrator
- via import

Creating a bundle through membership application

Read more/less

When a visitor to your site applies to a bundle membership level, a new membership bundle is automatically created with the applicant automatically designated as the bundle administrator.



Additional bundle members are added by the bundle administrator – they do not apply for membership through the membership application form. For more information, see Adding members to a bundle.

When the bundle application is submitted, a number of automatic actions take place:

- Application invoice is generated (and emailed depending on your Invoice and receipt settings).
- Application initiation email is automatically sent (if enabled).
- Status of the bundle administrator is set to **Pending New**. As a result, the bundle administrator cannot yet add members to the bundle (See also How membership status affects available functionality).
- Password email is sent right away to bundle administrator who can reset the password at anytime using the **Forgot password** li nk.

After the invoice is paid and the application is approved, the following actions take place:

- Status of the bundle administrator is set to **Active**. The bundle administrator can now add members to the bundle.
- Bundle administrator activation email is automatically sent if enabled. You can use this email to welcome the bundle administrator and instruct them how to add members.

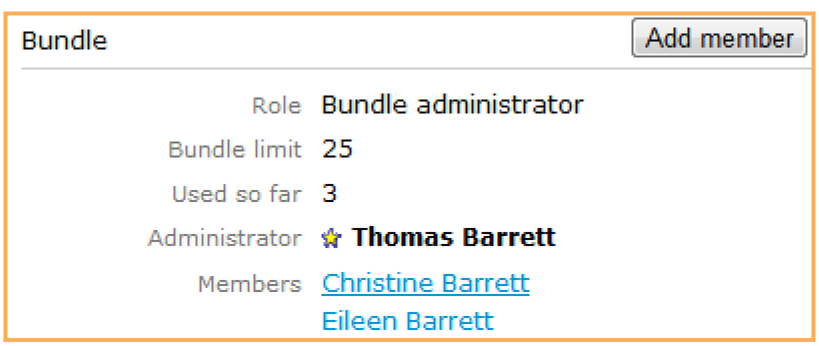
Creating a bundle by a site administrator

Read more/less

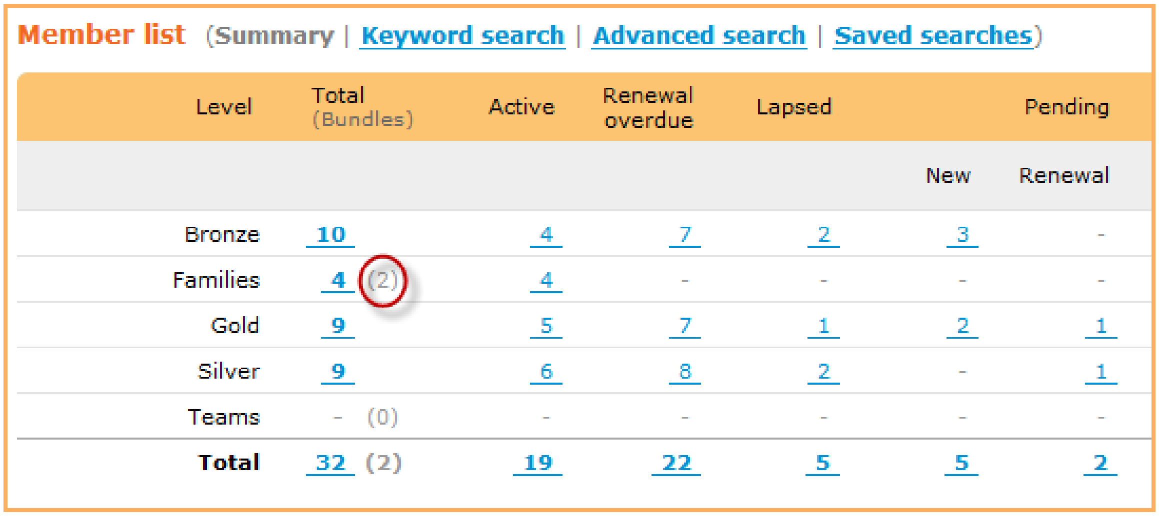
A site administrator can create a new bundle by assigning a bundle membership level to a contact. You can switch an existing member from a non-bundle membership level to a bundle level.

After saving your changes, a new bundle is created and the contact automatically becomes the bundle administrator.

The details of the membership bundle will now appear in the bundle administrator's membership details.



In the member list summary, the number of individual membership bundles is indicated by a gray number in brackets beside the bundle membership level name.



Member list (Summary | Keyword search | Advanced search | Saved searches)

Level	Total (Bundles)	Active	Renewal overdue	Lapsed	Pending New	Pending Renewal
Bronze	10	4	7	2	3	-
Families	4 (2)	4	-	-	-	-
Gold	9	5	7	1	2	1
Silver	9	6	8	2	-	1
Teams	- (0)	-	-	-	-	-
Total	32 (2)	19	22	5	5	2

Creating a bundle via import

To create a new membership bundle through import, set the **Membership level** field of the contact you want to be the bundle administrator to the appropriate bundle level. For more information, see Importing bundles.

Adding members to a bundle

Bundle members cannot add themselves to a bundle. There are three ways in which members can be added to a bundle:

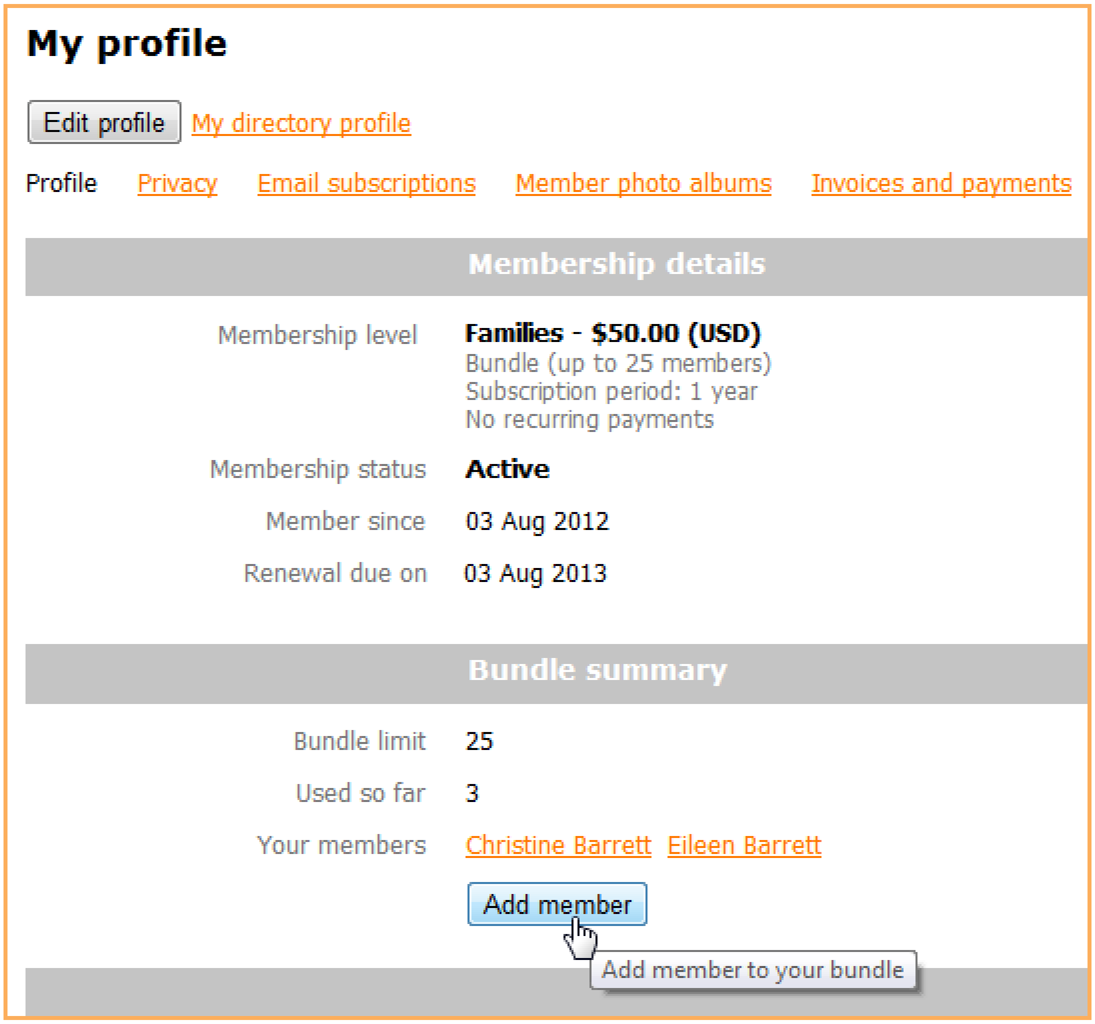
- by the bundle administrator
- by a site administrator
- via import

Once added, the bundle member is automatically activated and sent the password and activation emails. The bundle member activation email can be customized separately with different information than the bundle administrator activation email. Bundle members can then log into the site to access restricted pages and update their own profiles.

Adding members by the bundle administrator

Read more/less

After the invoice for the bundle membership fee is paid and the application is approved (if required), the bundle administrator can view and manage bundle members from within the bundle administrator's profile. To add a member to the bundle, the bundle administrator clicks the **Add member** button.



The bundle administrator completes the membership application form on behalf of the members then clicks **Save**. The new bundle member's record now appears. To return to their own profile, the bundle administrator clicks the **Return to bundle list and your own profile** link.

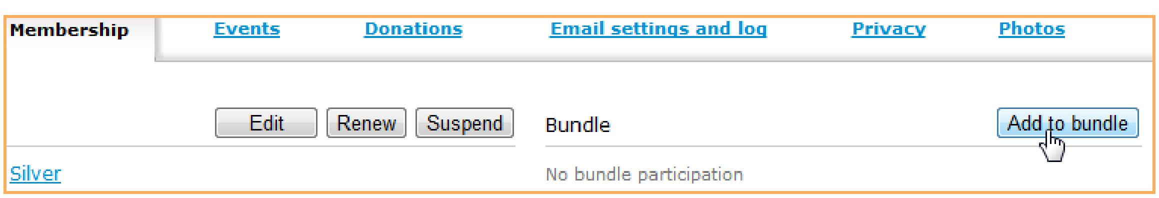
- The Add member button will only appear if there is a publicly accessible application form, listing that bundle member level.
- Bundle administrators can add to their bundle a non-member contact whose email address is already in your Wild Apricot database but they cannot add an existing member to their bundle.
- You can customize the page used to add members to bundles by modifying the **Add member to bundle** system page.

Adding members by a site administrator

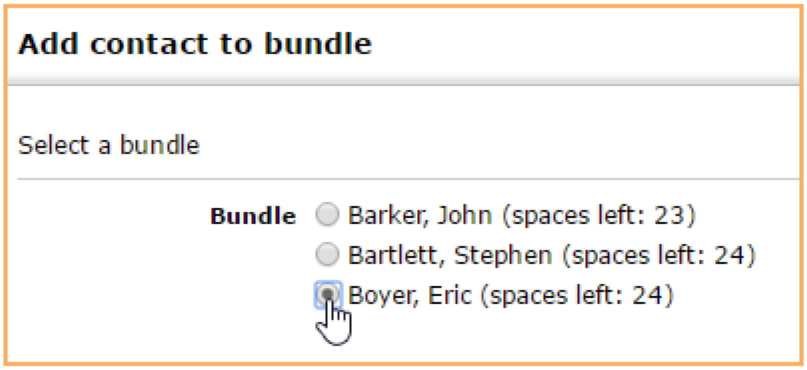
Read more/less

A site administrator can add members to any membership bundle.

To add a member who does not already belong to a bundle, the site administrator displays the contact record of the member to be added then clicks the **Add to bundle** button on the **Membership** tab.

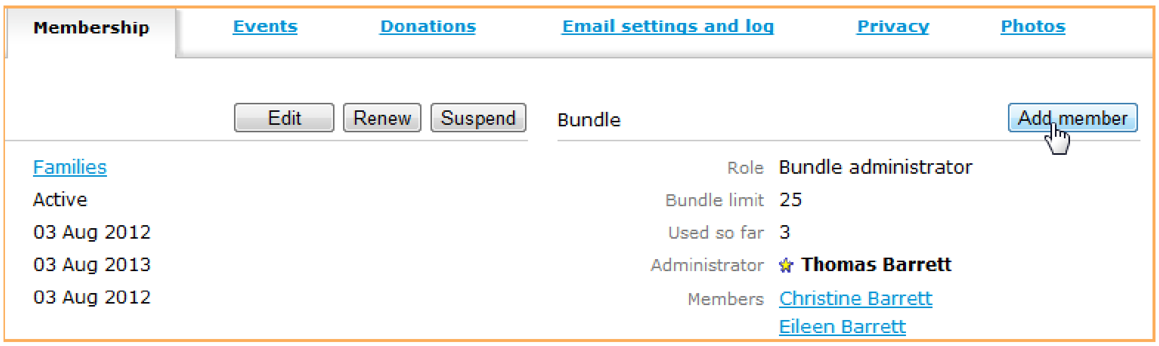


The site administrator then chooses the name of the bundle administrator of the bundle to which the contact is being added.



Bundle administrators are listed in alphabetical order by last name.

A site administrator can also add any member – including one who already belongs to an existing bundle – from the bundle administrator's contact record by clicking the **Add member** button then choosing the contact to be added.



Note the site admin can only bundle up existing members, while the bundle admin can only add brand new members to the bundle.

Adding members via import

Read more/less

To add a member to a membership bundle through import, set the **Member Bundle ID or email** field for the member to be imported to the email or user ID of the bundle administrator for the appropriate bundle. For more information, see Importing bundles.

Editing bundle member information

The bundle administrator can modify a bundle member's profile from within the bundle administrator's profile.To modify a bundle member's profile, click the bundle member's name within the **Bundle summary** section of the bundle administrator's profile, then click the **Edit profile** b utton within the bundle member's profile.

Suspending bundle members

You can suspend all the members in a bundle by suspending the bundle administrator. For instructions on suspending the bundle administrator, see Suspending a membership.

Archiving bundle members

You can archive all the members in a bundle by archiving the bundle administrator. For instructions on archiving the bundle administrator, see Deleting and archiving member and contact records.

Removing a bundle member

To remove a member from a bundle, assign the bundle member to a different non-bundle membership level. A bundle administrator cannot delete a bundle member but can archive a bundle member, so that the member is no longer part of the bundle, but still remains part of the site's contact database (though as an inactive contact).

Removing a bundle

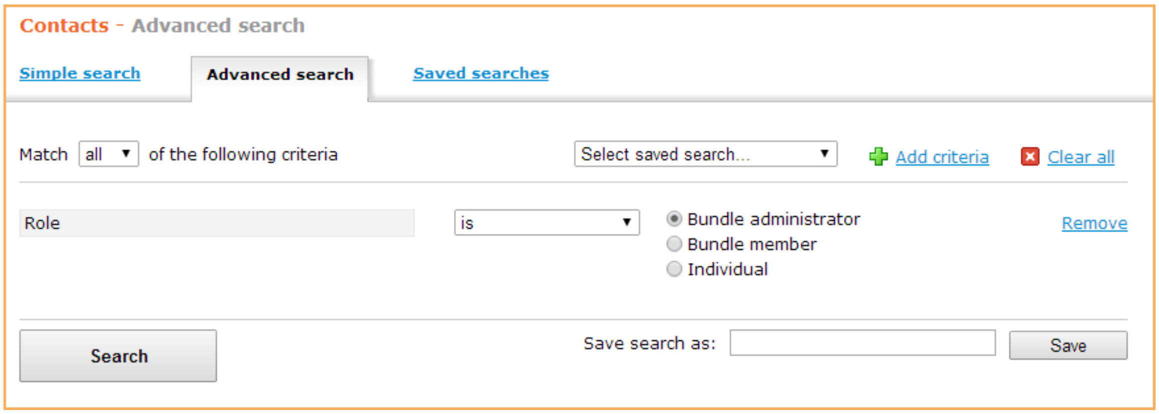
To remove the bundle itself, reassign all members to different membership levels, with the bundle administrator being reassigned last.

Searching for bundle administrators

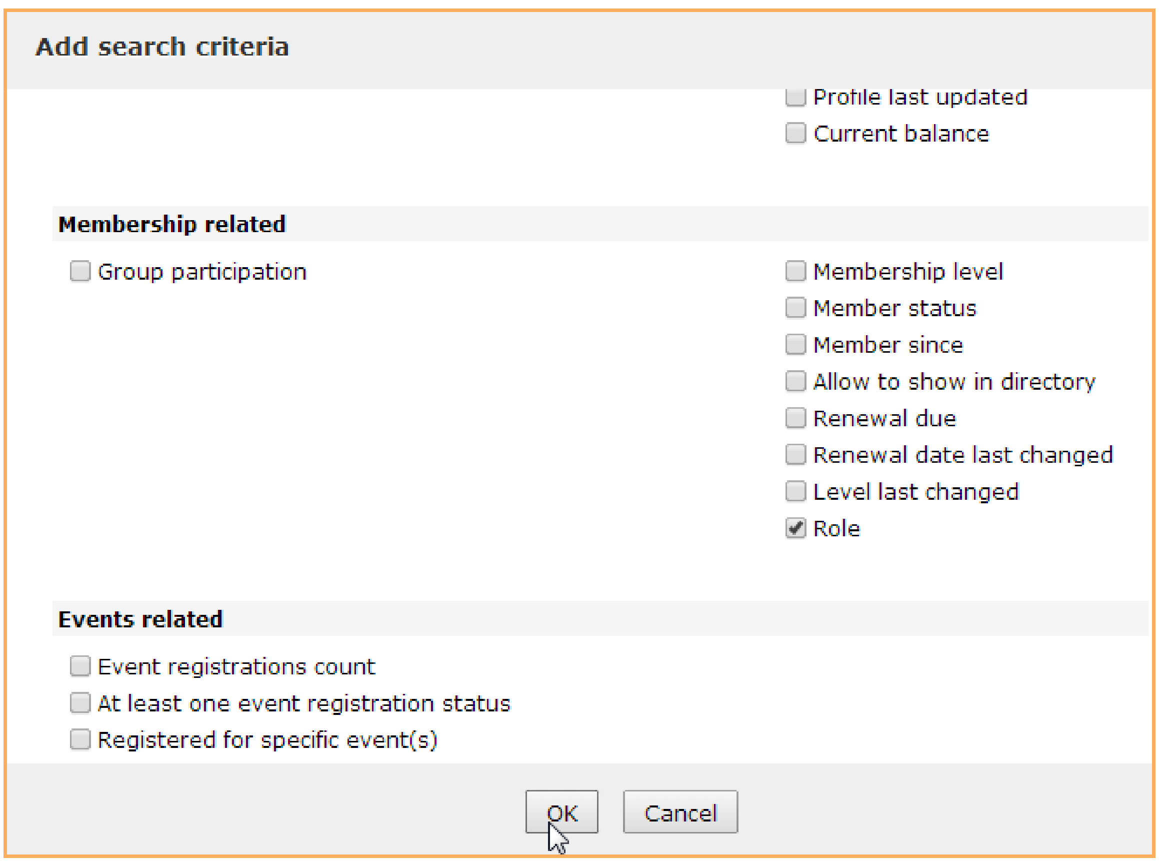
To search for administrators of membership bundles, follow these steps:

Read more/less

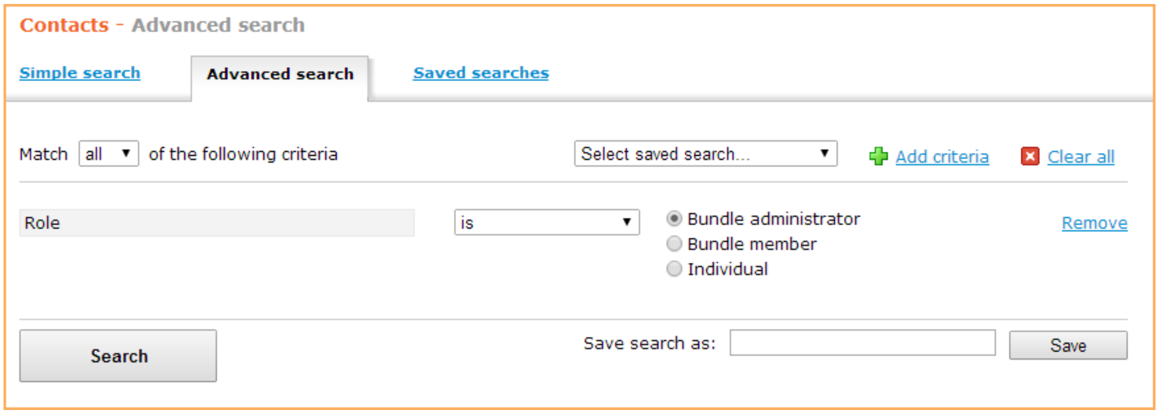
1. Go to the **Contacts** module.
2. Click the **Advanced search** tab.
3. Click the **Add criteria** link.



4. From the pop-up window that appears, select **Role** from the **Membership related** section then click the **OK** button.



   The **Role** criterion should now appear on the advanced search screen.
5. To the right of the **Is** dropdown, click the **Bundle administrator** option.

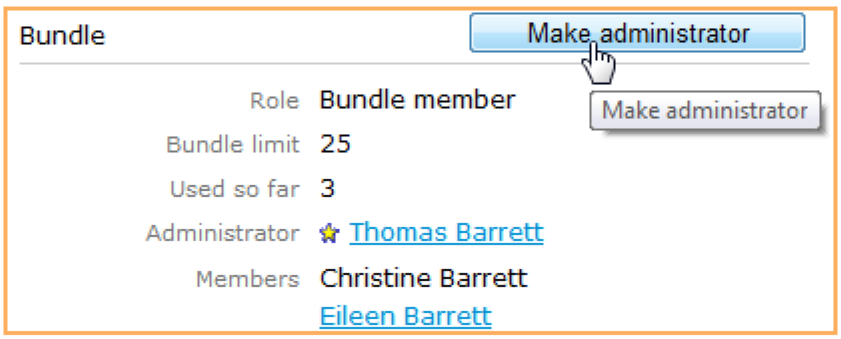


6. Click the **Search** button. A list of bundle administrators should now appear.

Changing bundle administrators

To change the bundle administrator, display the membership details for the member you want to be the new bundle administrator, then click **Make administrator**.

Read more/less



The former bundle administrator now becomes a regular bundle member.

> The **Make administrator** button is grayed out if the current bundle administrator has recurring payments set up. To change bundle administrators in this case, stop the recurring payments for the current administrator, then switch administrators. Now, renew the bundle membership by clicking the **Renew** button on the **Membership** tab for the new bundle administrator, then click **Generate invoice**.

On this page:

Expand all sections

See also:

- Bundle administrator guide
- Membership levels

Bundle administrator guide

Bundle administrator guide

A membership bundle is a collection of members who are linked together and managed by one of their members – the bundle administrator. The bundle administrator is responsible for adding new members to the bundle.

Bundle members share the same renewal date, status, and membership level. The entire bundle is charged a single membership fee, which is paid by the bundle administrator.

Membership bundles are not given names but are represented by the names of their bundle administrators.

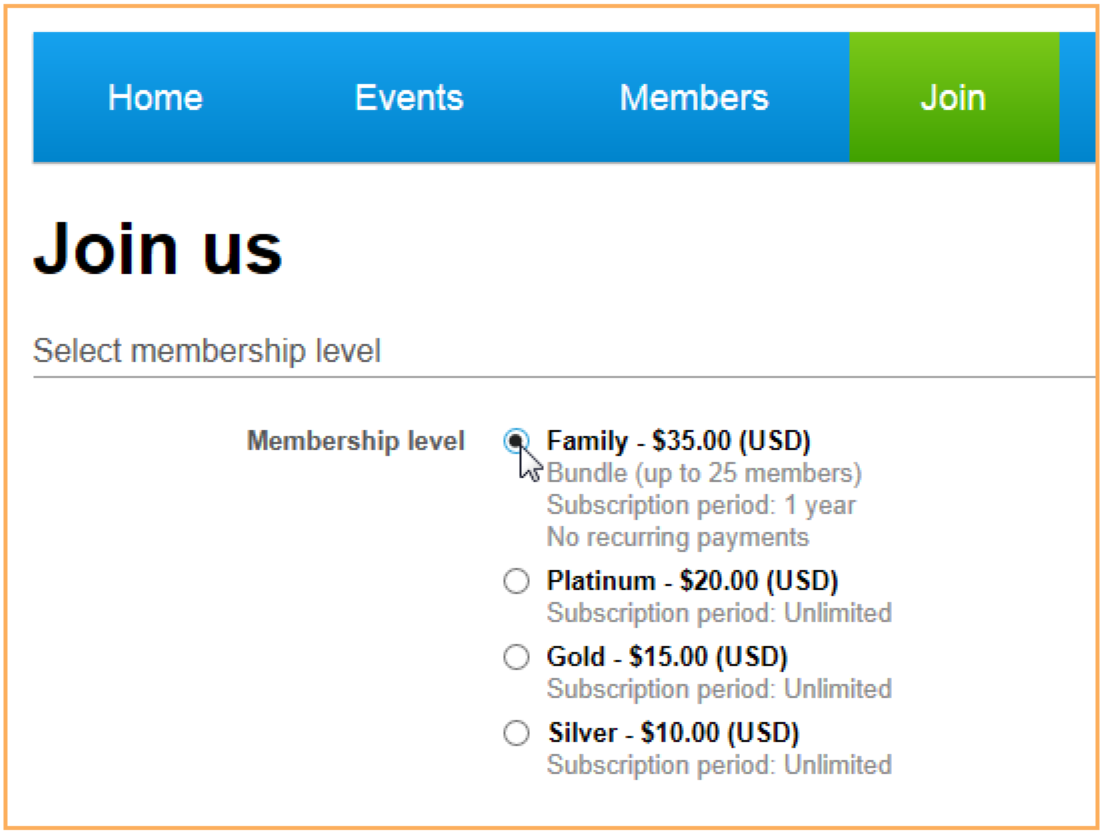
Creating a membership bundle

Your site administrator can create a membership bundle for you, or you can create the bundle yourself. When you create a new bundle, you automatically become the administrator for that bundle.

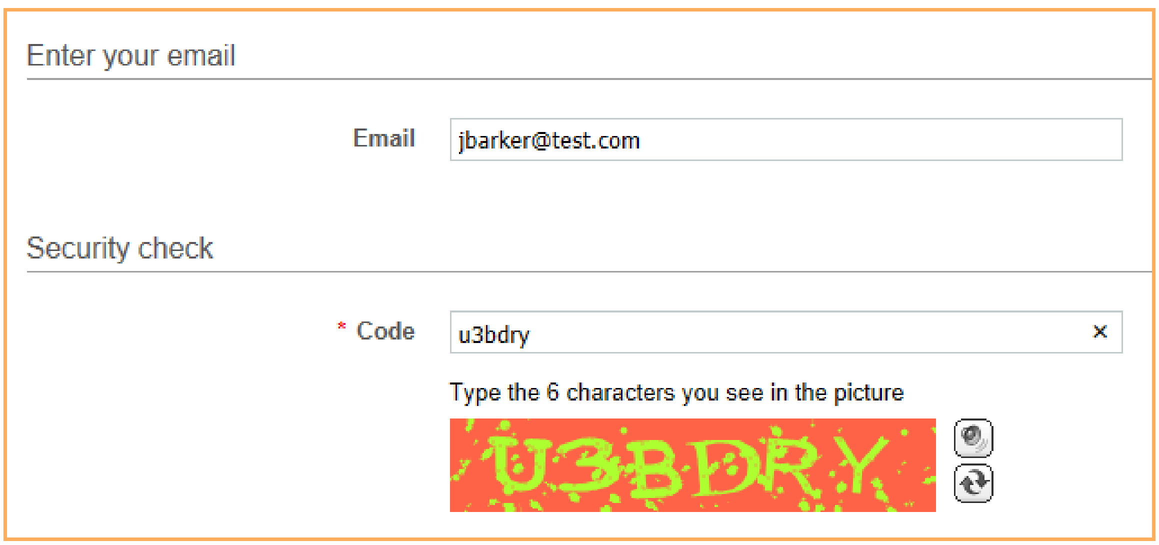
Read more/less

To create a membership bundle and become the bundle administrator, follow these steps:

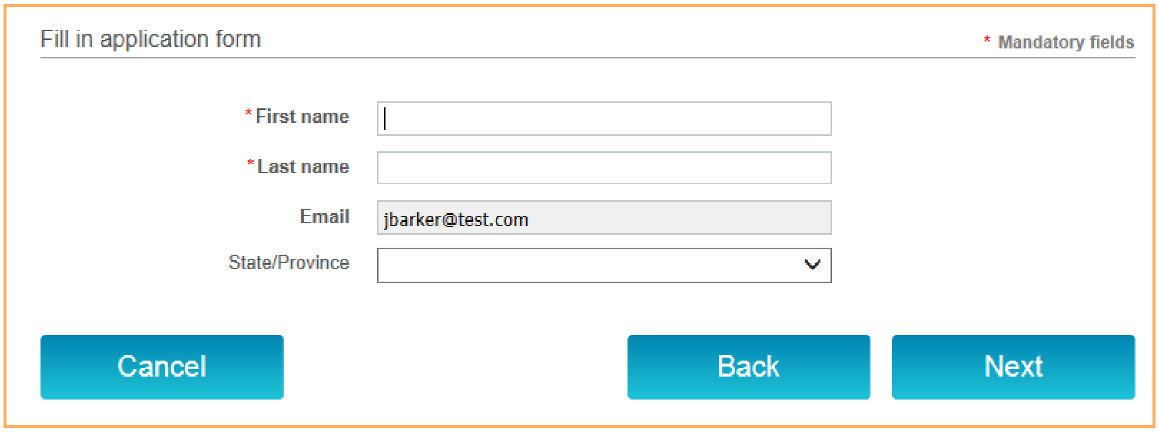
1. Go to the page on your Wild Apricot site that has a membership application form. The page might be called something like **Join us** or **Become a member** .
2. Within the list of membership levels, select the bundle membership level. Depending on your site, it might be called **Bundle**, **Family**, **Team**, or **Company**.



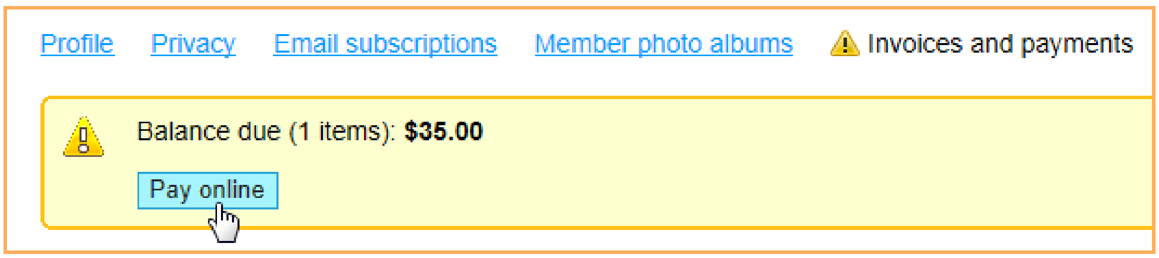
3. Click **Next** to continue.
4. On the next screen, enter your email address (unless you are already logged into the site). If your email address already exists on this site – because you've registered for an event or made a donation – you will be prompted to log in before proceeding. You may also be required to enter a Captcha code to prove you are not a spambot.



5. Click **Next** to continue.
6. Complete the membership application form. Required fields will be marked by an asterisk.



7. After you're finished completing the application form, click **Next** to continue.
8. Review the summary of your application and click **Confirm** to proceed with the application. You'll be sent an email with an invoice for the bundle membership fee, and another with your password. Depending on your site's bundle settings, your application may have to be approved by an administrator and/or payment may have to received in full before your membership is activated.
9. After confirming the membership application, you'll be taken to the **Invoices and payments** page on your member profile (unless the bundle is free). If online payment is enabled on your site, you can click **Pay online** to pay the application invoice, along with any other open invoices (such as event invoices).



Once the invoice is paid – and the application is approved (if applicable) – you'll receive an activation email, and you can start adding members to your bundle.

Adding members to a bundle

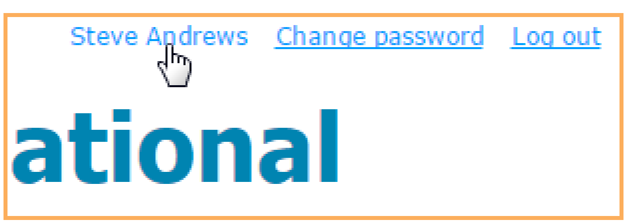
A site administrator can add members to a bundle, but generally, it is the responsibility of the bundle administrator.

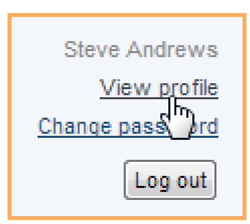
Read more/less

A bundle administrator can add brand new site members to the bundle, or add existing non-member contacts. They cannot add an existing member – as identified by their email address – to their bundle.

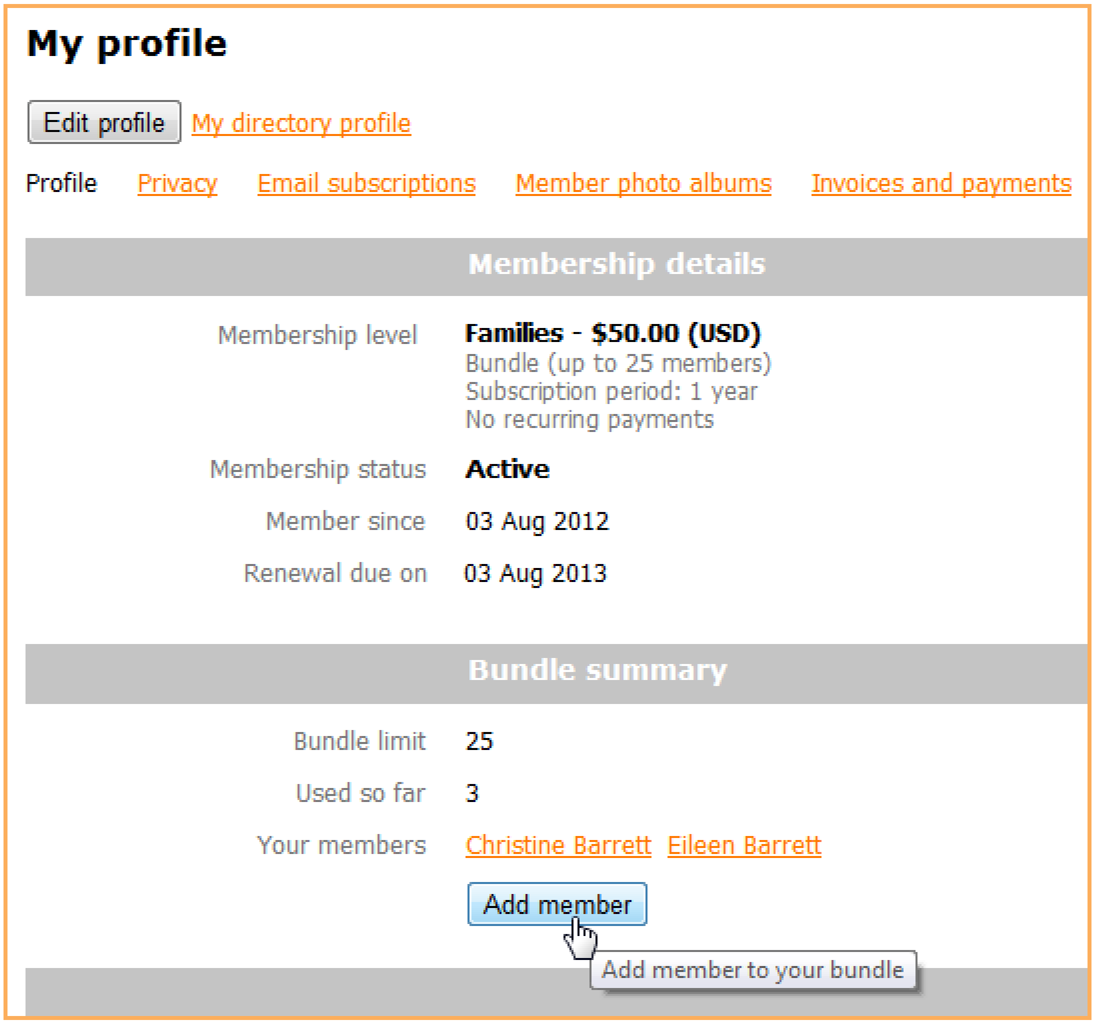
To add members to a bundle as the bundle administrator, follow these steps:

1. Log into your Wild Apricot site.
2. Click your name or the **View profile** link to jump to your member profile.





3. Within the **Bundle summary** section of your **Profile** page, click the **Add member** button.



4. Complete the membership application form on behalf of the person you want to add as a bundle member.
5. Click **Save**.
6. The new bundle member's record now appears. To return to your profile, click the **Return to bundle list and your own profile** link.

New bundle members can have different join dates but will share a single renewal date. Depending on how your site administrator set up the bundle, there might be a limit on the number of members that can be added.

Editing bundle member information

The bundle administrator can modify a bundle member's profile from within the bundle administrator's profile. To modify a bundle member's profile, click the bundle member's name within the **Bundle summary** section of the bundle administrator's profile, then click the **Edit profile** b utton within the bundle member's profile.

Removing a bundle member

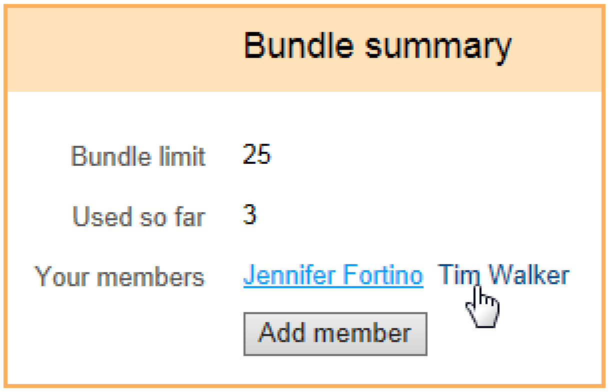
Only a site administrator – not a bundle administrator – can remove a member from a bundle, by assigning the bundle member to a non-bundle membership level.

Read more/less

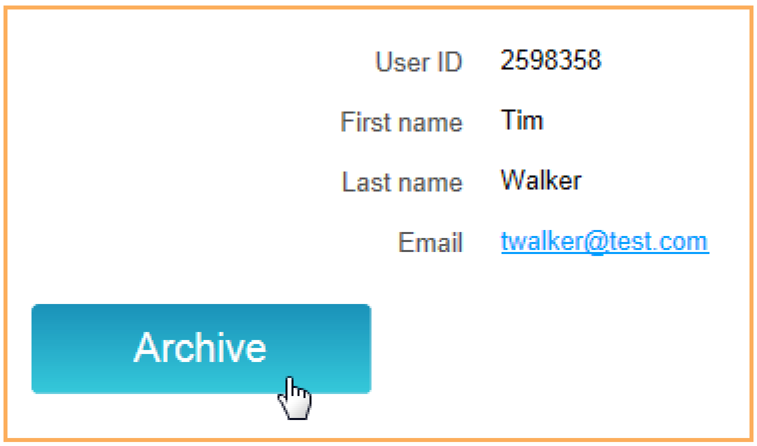
A bundle administrator, however, can archive a bundle member, so that the member is no longer part of the bundle, but still remains part of the site's contact database (though as an inactive contact).

To archive a bundle member, follow these steps:

1. Log into your Wild Apricot site.
2. Click your name or the **View profile** link to jump to your member profile.
3. Within the **Bundle summary** section of your **Profile** page, click the name of the member you want to archive.



4. From the member's profile that appears, scroll down to the bottom and click the **Archive** button.



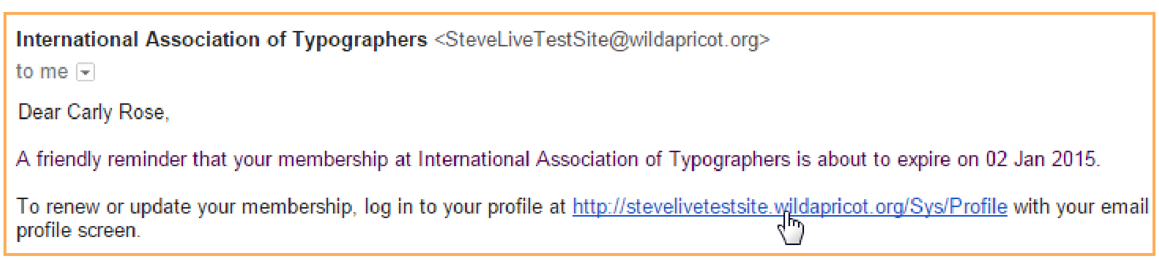
5. You can now click the **Return to bundle list and your own profile** link to return to your member profile.

Renewing a membership bundle

All bundle members share the same renewal date. While bundle members may also receive renewal reminders and renewal notifications, only the bundle administrator can actually renew on behalf of the entire bundle.

Read more/less

A renewal reminder will be emailed to the bundle administrator a certain number of days before the membership renewal date. The renewal reminder may include a link you can click to log into your Wild Apricot account.



Depending on the renewal options your site administrator chose when setting up the bundle, you may also receive an invoice for the membership fee. The invoice email may include a link you can click to view and pay the invoice without logging in.

You can also renew your membership from your member profile on your Wild Apricot site. To access your member profile, log into your Wild Apricot site and click your name or the **View profile** link . From your member profile, click the **Renew** button on your **Profile** page.

After you click the **Renew** button, you can review and update your membership details, then click the **Update and next** button. Then, you click the **Confirm** button to confirm the renewal request. You will be taken to the **Invoices and payments** page where you can pay for the invoice for the renewal. The membership fee is payable by the bundle administrator on behalf of the entire bundle.

Once the bundle is renewed, renewal notifications are sent to individual bundle members.

Changing bundle administrators

Only a site administrator can change the bundle administrator to another bundle member. After another member is made the bundle administrator, the previous bundle administrator becomes a regular bundle member.

On this page:

Expand all sections

Membership emails

Membership emails

You can provide for emails to be sent automatically when someone applies for membership in your organization, when they approach their membership renewal, and when they renew their membership. You can control who receives these emails, and customize the email themselves.

The delivery of membership emails is controlled separately for each membership level. You can customize the membership emails separately for each membership level, or customize the default email templates so that your changes are reflected in the membership emails for all new levels.

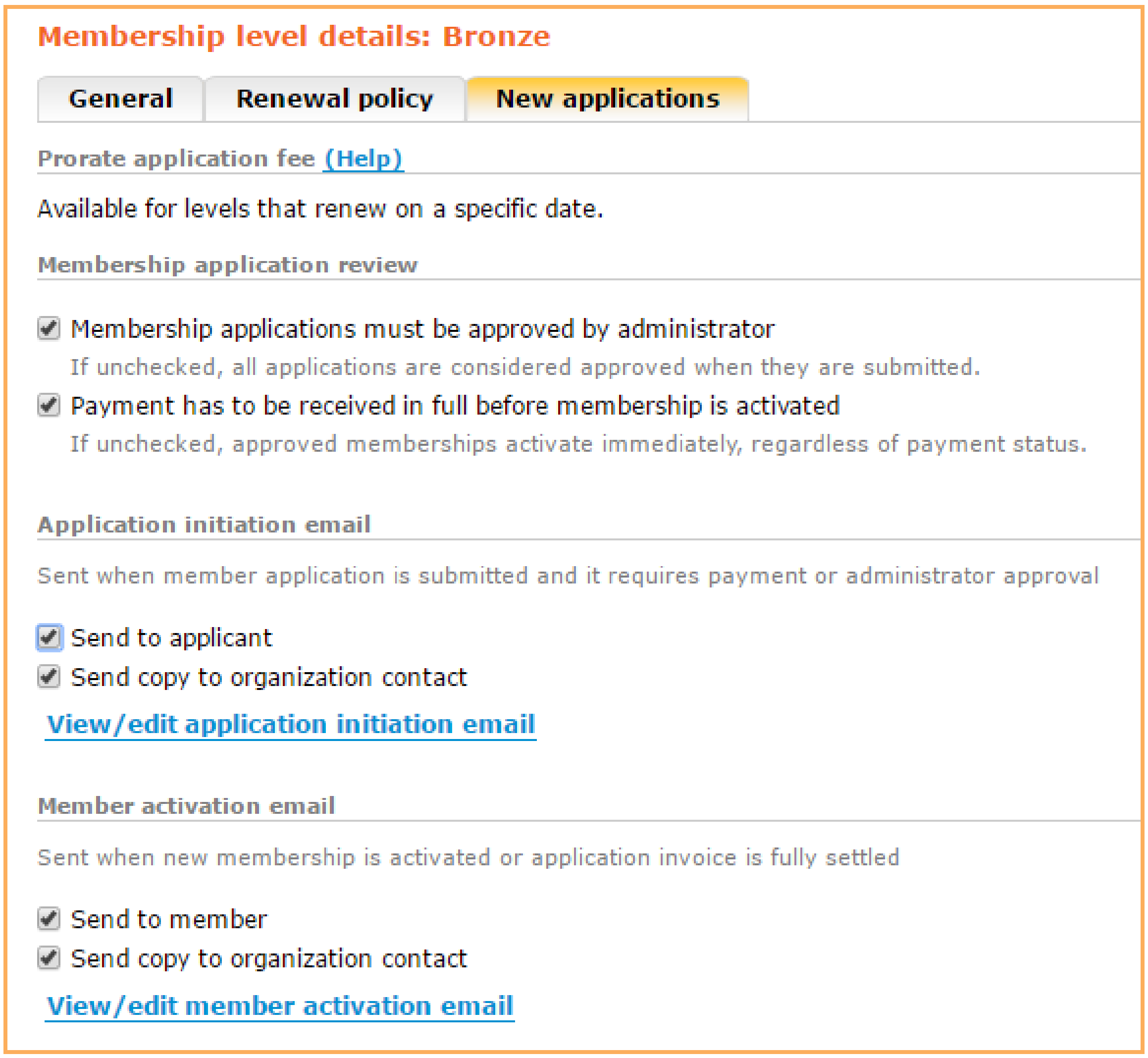
Membership application emails

Membership application emails are sent when someone completes the membership application form. Bundle activation emails are sent when a new membership bundle is created, or a new member is added to an existing bundle.

> Automatic emails are not sent when a contact or member is added manually by an administrator. An administrator can manually send a password email to the contact by clicking the **Email new password** button from the **Login details** section of the **Contact details** tab on their contact record.

Read more/less

To control the delivery of membership application emails and bundle activation emails, choose the appropriate membership level then go to the **New applications** tab.



From here, you can customize the messages and control who receives them. You can choose to send the following membership application emails:

Email type	Timing	Recipients
Application initiation	When member application is submitted and it requires payment or administrator approval	Applicant and/or organization contact
Member activation	When new membership is activated or application invoice is fully settled	Member and/or organization contact
Bundle administrator activation	When new membership bundle is created or application invoice is fully settled	Bundle administrator and/or organization contact
Bundle member activation	When new member is added to a membership bundle.	Member, bundle administrator, and/or organization contact

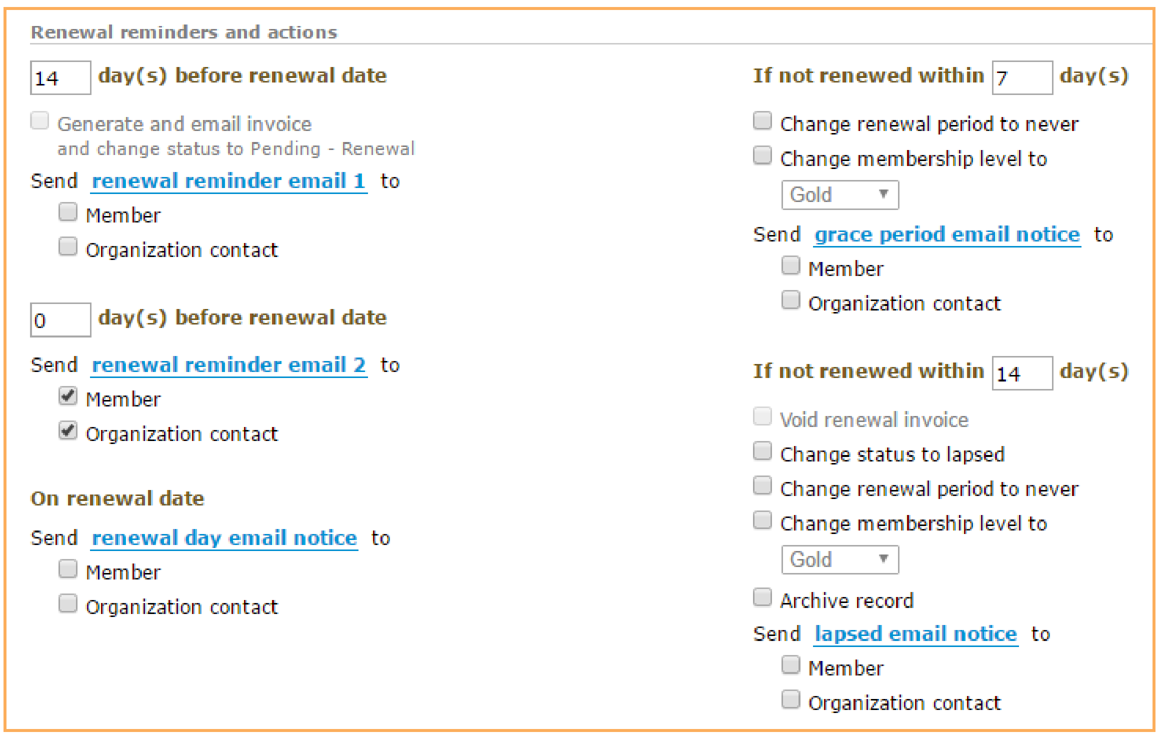
See also Invoices and receipts (below).

Renewal reminders

Renewal reminders are sent when a member is approaching their renewal date. You can turn the various renewal reminders on or off, and control how many days ahead of the renewal date they are sent. You can also control whether the member and/or organization contact receive the reminders. For bundle levels, you can also control whether to send the reminders to the bundle administrator.

To control the delivery of renewal reminders, go to the **Renewal policy** tab for each membership level.

Read more/less



You can choose to send the following renewal reminders:

Email type	Timing	Possible recipients
Reminder 1, 2	*x* number of days before renewal date	Member and/or organization contact
Renewal invoice	Same as Reminder 1	Member and/or organization contact
Renewal day notice	Renewal day	Member and/or organization contact
Grace period notice	*x* number of days after renewal date	Member and/or organization contact

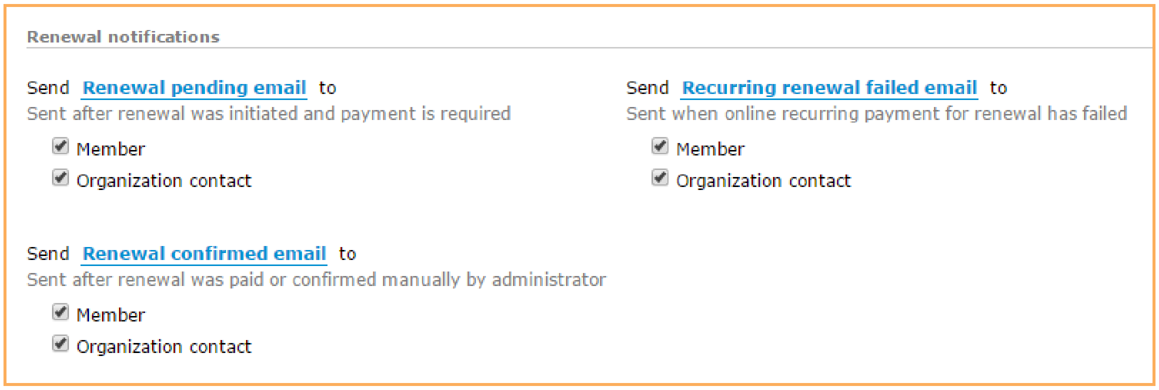
Lapsed notice	*x* number of days after renewal date	Member and/or organization contact

⚠ The delivery of renewal invoices is not affected by the invoice settings on the Invoice and receipt settings screen.

Renewal notifications

From the Renewal policy tab, you can also control the delivery of renewal notifications. Renewal notification messages are sent when a membership has been renewed, or when an automatically recurring renewal has failed.

Read more/less



For each renewal notification, you can control whether the member and/or organization contact receives them. For bundle levels, you can also control whether to send the notification to the bundle administrator.

You can choose to send the following renewal notifications.

Email type	Timing	Possible recipients
Renewal pending	When membership renewal is initiated but renewal fee has not been paid online within 15 minutes	Member and/or organization contact
Renewal confirmed	When membership renewal fee is fully paid	Member and/or organization contact
Credit card expiry notification	Two weeks before and on date of credit card expiry. Applies only to Stripe, Authorize.Net, Moneris, and Payflow Pro payment gateways.	Member and/or organization contact
Recurring renewal failed	When recurring payment for membership renewal fails	Member and organization contact

See also Invoices and receipts (below).

Member level change emails

Member level change emails are sent when a member changes their membership level.

Read more/less

There are two types of member level change emails:

Email type	Timing	Recipients
Member level change initiated	When membership level change is initiated (unless online payment is completed within 15 minutes)	Member
Member level change succeeded	When the new membership fee has been fully paid	Member and organization contact

You cannot customize member level change emails, or control who receives them.

Invoices and receipts

Invoices are automatically emailed when someone performs a self service transaction such as signing up for a membership or renewing a membership.

Read more/less

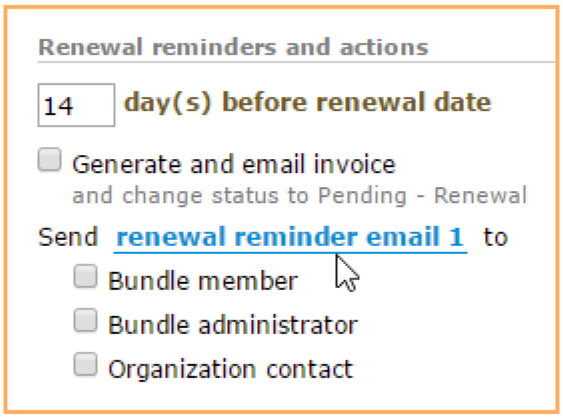
You can customize the invoice email and control whether invoices are sent to the payer and/or administrator, but any changes you make will be applied to all invoices issued throughout your entire system, including those issued for event registrations. Likewise, you can control who receives payment receipts via email, and customize the receipt email, but your changes will be applied to all receipts issued from your Wild Apricot account.

To customize the invoice and receipt emails, and control who receives them, hover over the **Finances** menu then click **Invoice and receipt settings**. For more information, see Customizing invoices and receipts.

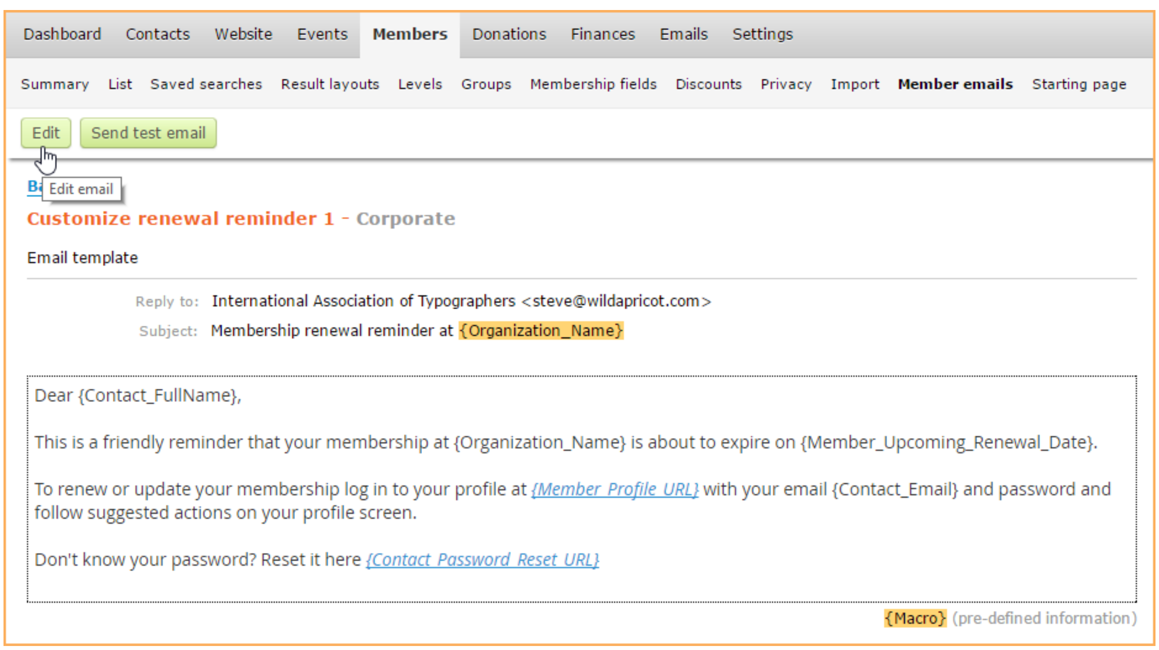
Customizing emails for individual membership levels

You can customize the content of membership emails for individual membership levels by clicking on the email link within the appropriate membership level tab...

Read more/less



...then clicking the **Edit** button.



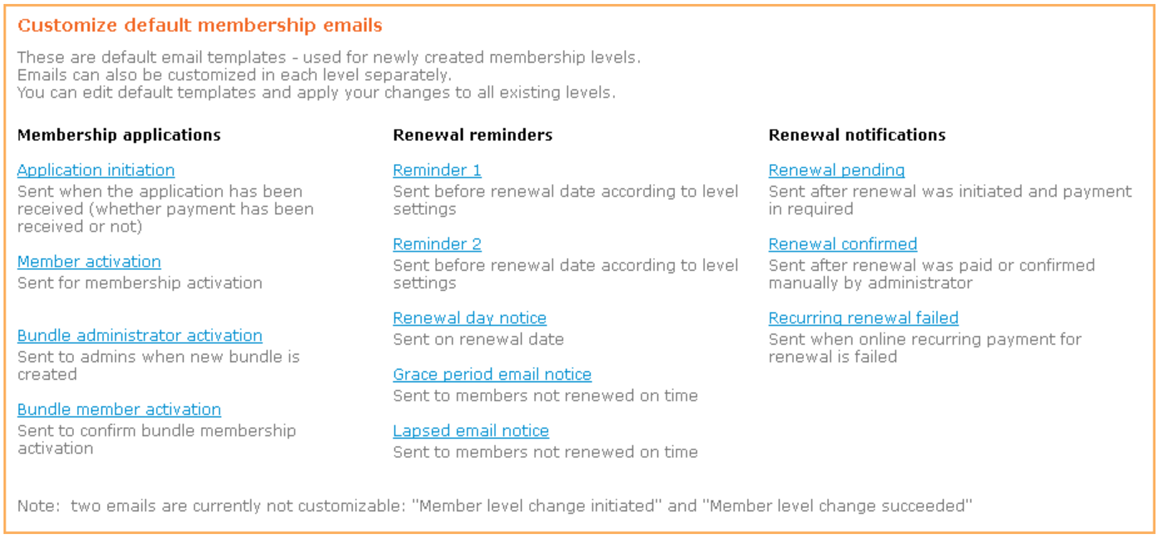
Within each email template, you can add or replace text, links, pictures, and macros using the options appearing on the content editor toolbar.

Customizing default membership emails

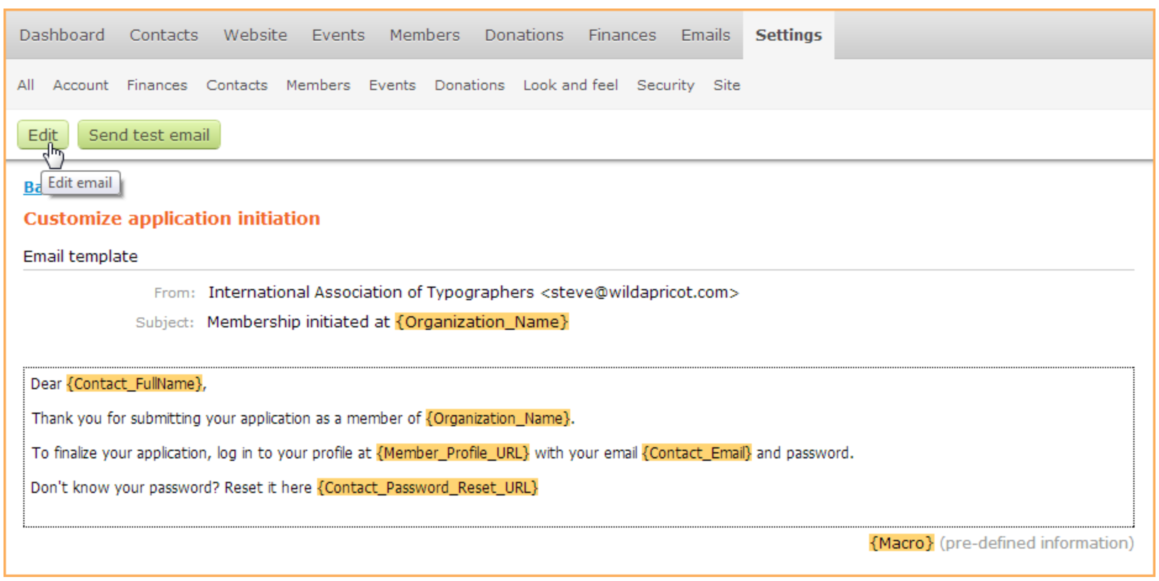
You can also modify the default membership emails so that your changes are reflected in the membership emails for all new levels. Whether your changes are reflected in existing membership emails depends on the choice you make when you save your changes to a default membership email.

Read more/less

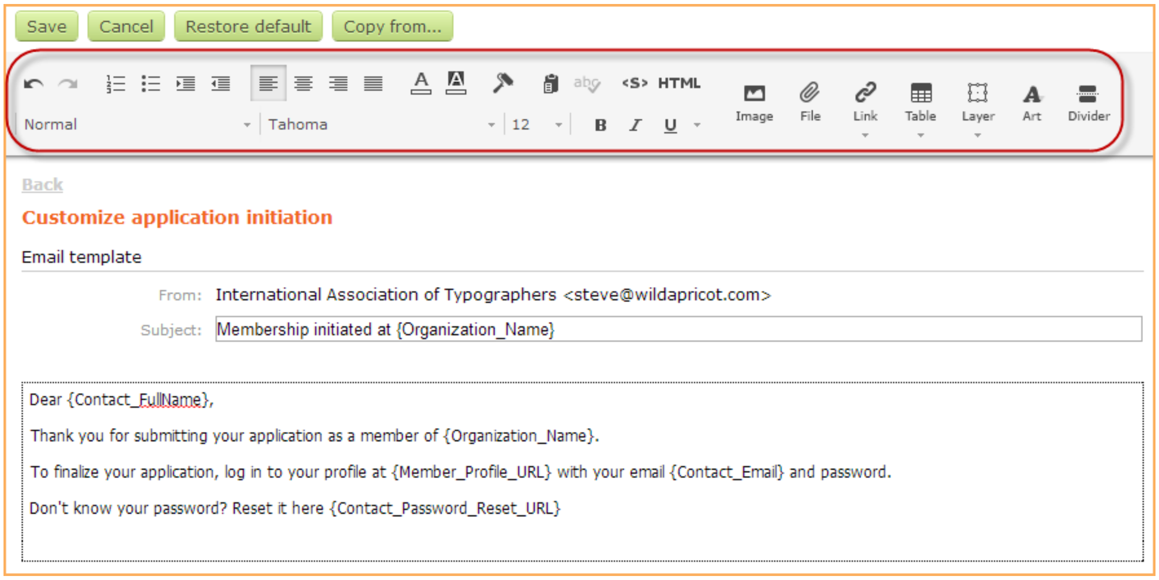
To customize the default membership emails, hover over the **Members** menu and click the **Membership emails** option. A list of default emails will appear.



To customize any of these emails, click the email within the list then click the **Edit** button.



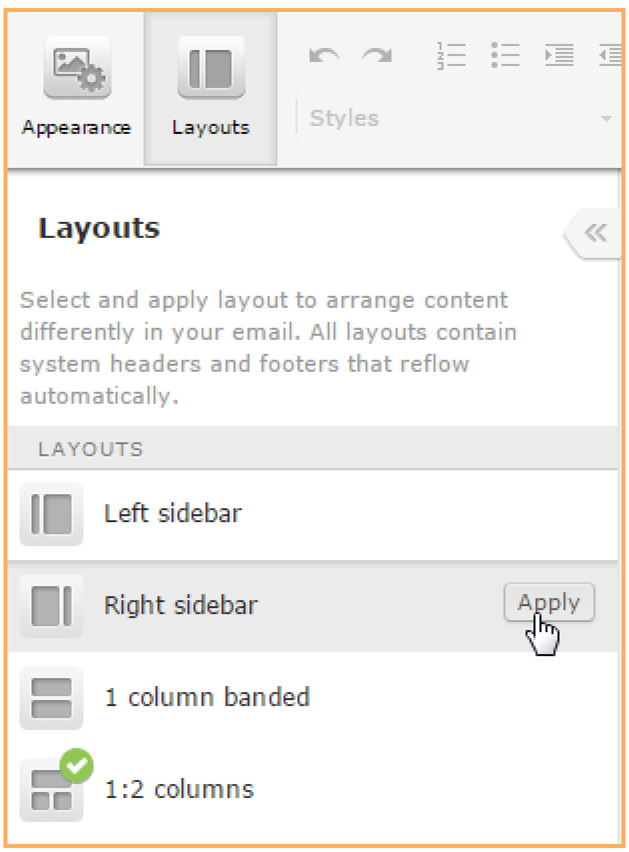
Within each email, you can add or replace text, links, pictures, and macros using the options appearing on the content editor toolbar.



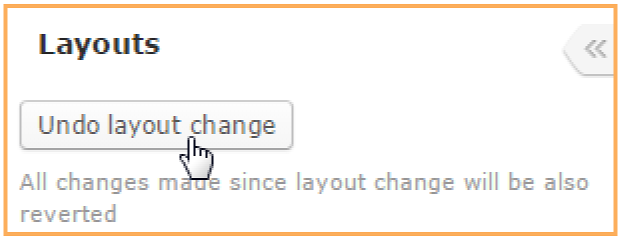
To choose a previous email or an email template as the basis for the email, click the **Copy from** button. To restore the original pre-modified version of the email – the factory default – click the **Restore default** button.

The default membership emails are basic emails without any layout. To apply a layout, follow these steps:

1. Click the **Layouts** icon towards the top of the screen.
2. Click the layout you want to switch to.
3. Click the **Apply** button.

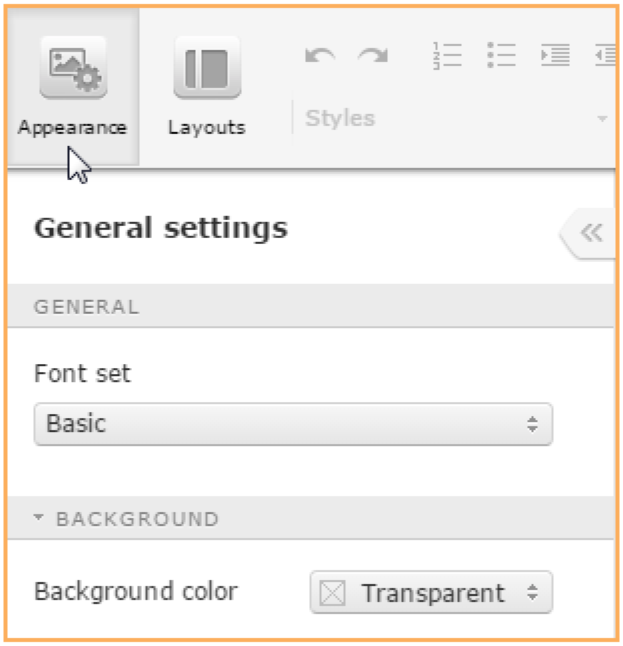


After switching to a different layout, you can undo the layout change by clicking the **Undo layout change** button within the layout panel.



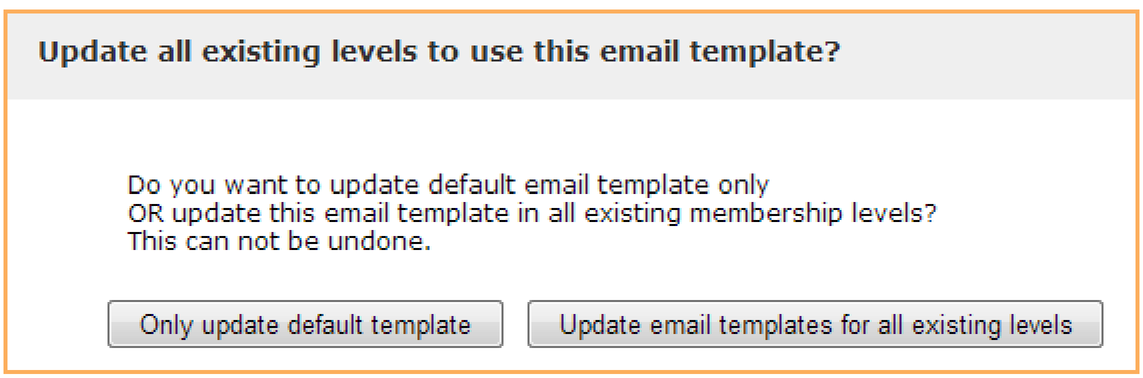
Any changes that you have made since the layout change will also be reversed.

After applying a layout, you can click the **Appearance** icon and set a background color for the message, and change the font set.



With a layout applied, you can click individual cells within the message and adjust cell settings, including background, padding, margins, and borders.

When you are ready to save your changes, click the **Save** button. You will be presented with the following choice:



Click **Update only default template** if you want your changes to be applied only to emails in future membership levels, and not to emails in existing levels.

Click **Update email templates for all existing levels** if you want your changes to be applied to emails in existing and future membership levels. This allows you to make a global change to this kind of membership email throughout all your membership levels. Any customizations you have made to existing membership emails of this type will be replaced with the version you are saving here.

Only the particular membership email you are currently modifying will be affected by your choice here. Any other membership emails will remain as they were.

After you have saved the default email, you can test it by clicking the **Test** button. A sample of the email will be sent to you containing sample data – not actual data from your database – to give you an idea of what the email will look like.

On this page:

Expand all sections

See also:

- Event emails

Member groups

Member groups

You can organize members from different membership levels into member groups according to their interests or participation in committees. For example, you could create member groups such as "Board of Directors" or "Steering Committee".

You cannot add non-member contacts to member groups. For more information, see Contacts vs members.

Organizing members into member groups allows you to:

- Select groups to receive email blasts (including event announcements)
- Control page access by member group
- Restrict events by member group
- Limit permissions in blogs and discussion forums by member group

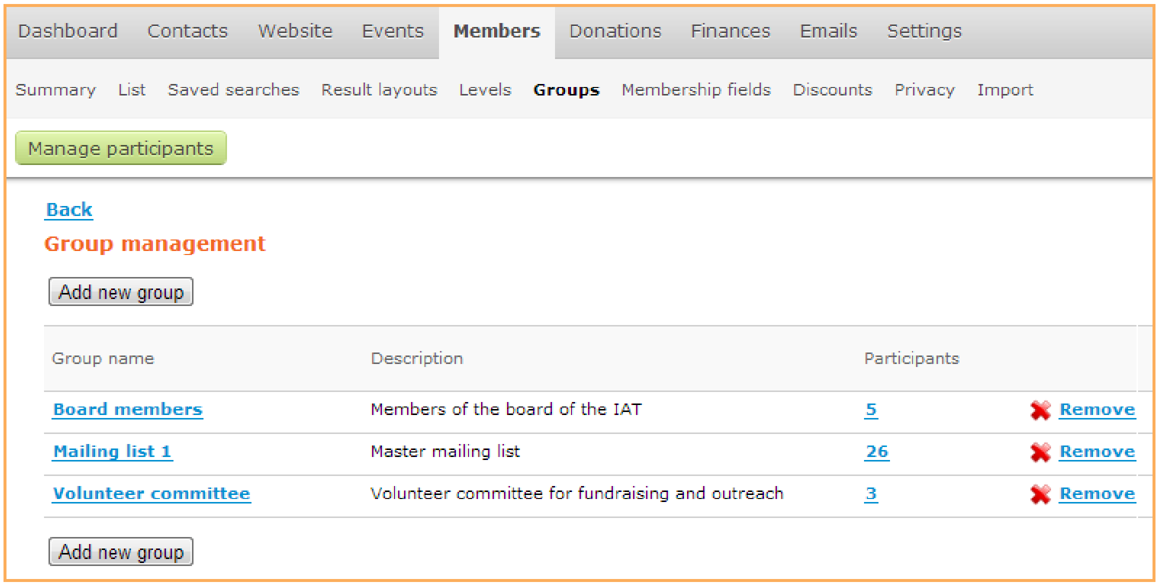
Only full administrators and membership managers can add, modify, and delete member groups,

Displaying the Group management screen

To set up and manage your member groups, click the **Groups** option under the **Members** menu.

Read more/less

On the **Group management** screen that appears, you see a list of member groups and the number of participants in each group.

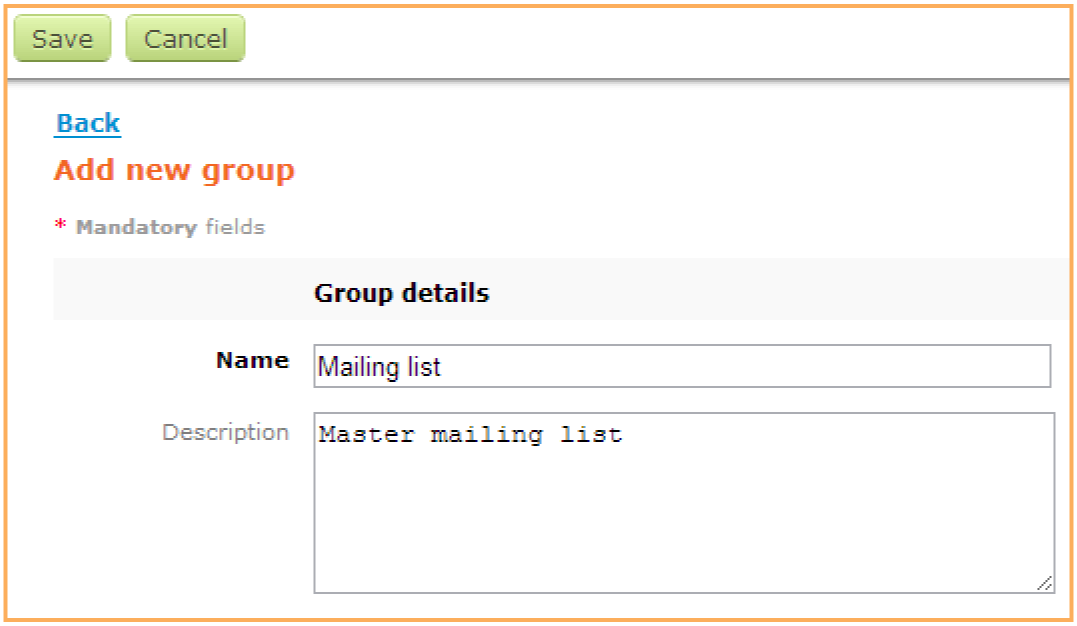


Creating a member group

To create a new member group, click the **Add new group** button from the Group management screen.

Read more/less

From the screen that appears, you enter a name for the group, and optionally, a description.



When you click **Save**, the new member group is added to the member list on the Group management screen.

To change the name and description of an existing member group, click it within the list.

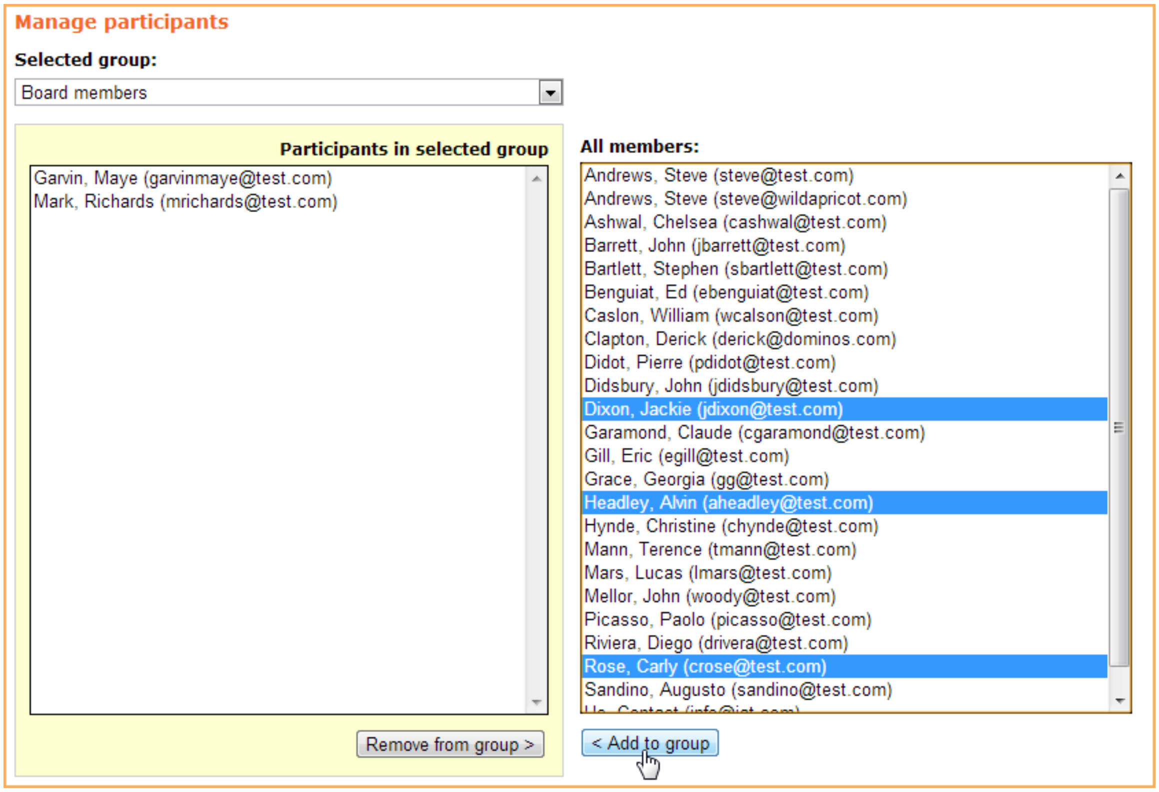
Adding group members

To add members to a group, click the **Manage participants** button, either from the Group management screen or from an individual group's details screen.

Read more/less

From the Manage participants screen, you can add members to or remove members from the selected group, or switch to managing another member group.

To add members to the group, select them within the **All members** list on the right then click the **Add to group** button.



To remove members from the group, select them within the **Participants in selected group** list on the left and click the **Remove from group** button.

To switch to managing a different member group, click the **Selected group** list and choose the group.

Adding members through import

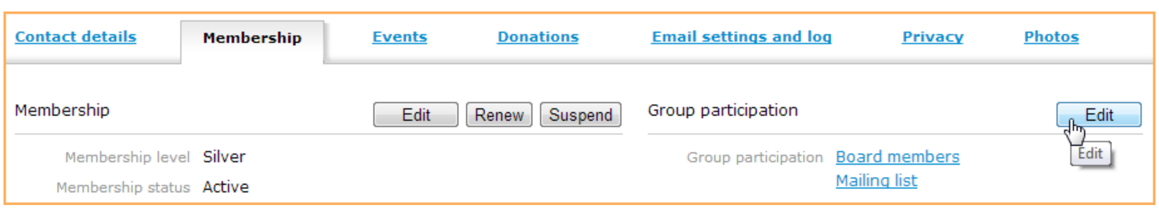
You can also add members to groups when importing contacts into your Wild Apricot database. Within the spreadsheet that controls the import, you can assign a member to a group by entering the group name in the **Group Participation** column.

Controlling group participation on an individual basis

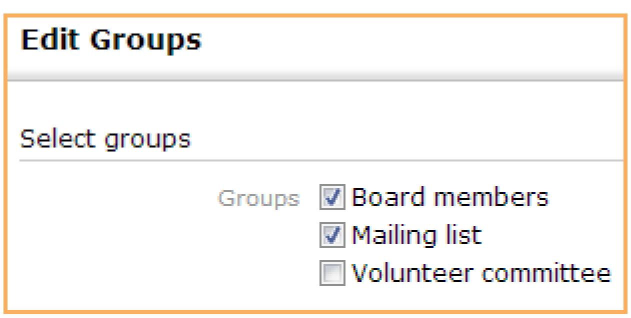
You can control group participation for individual members from the **Membership** tab of their contact record.

Read more/less

From the **Membership** tab, click the **Edit** button within the **Group participation** section.



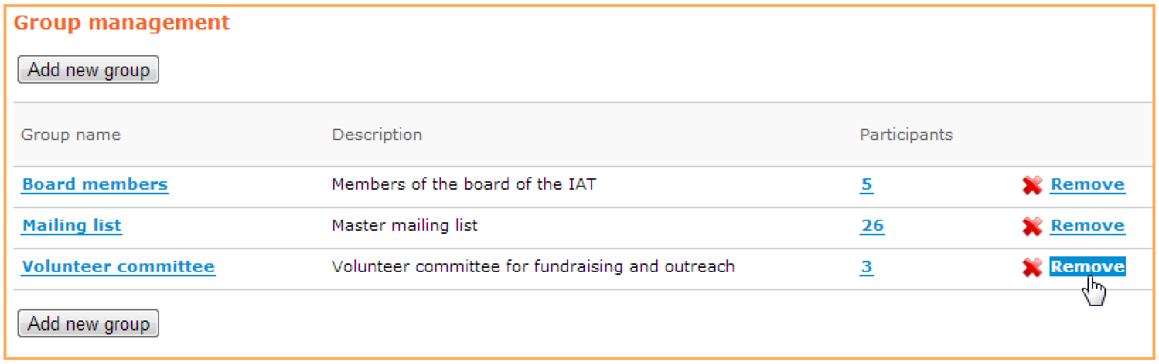
From the screen that appears, you can check the member groups you want the member to belong.



Deleting a member group

To delete a member group, click the **Remove** link beside it within the list on the Group management screen.

Read more/less



You will be prompted to confirm your request to remove the group.

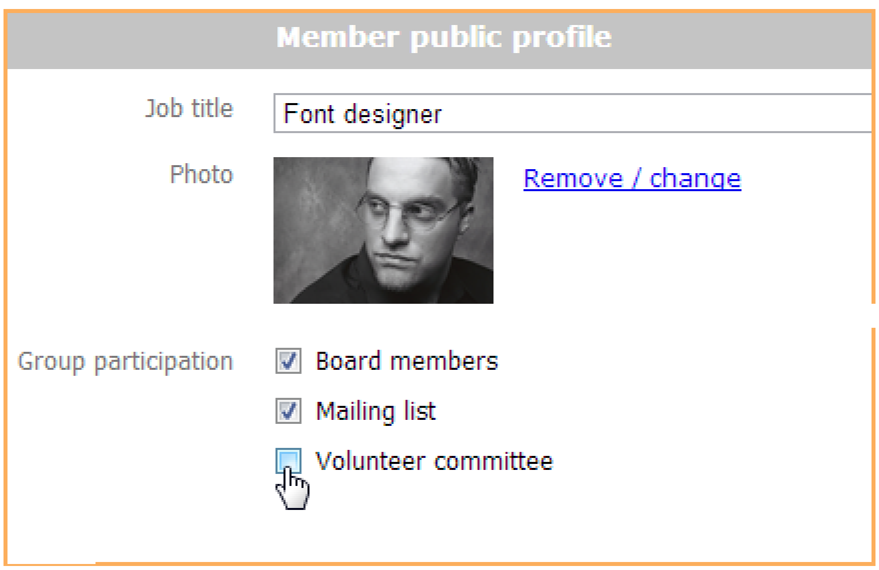
> Deleting a member group has no effect on the members in the group (other than removing them from the group).

Allowing members to control their group participation

You can control whether members can view and/or choose which member groups they belong to.

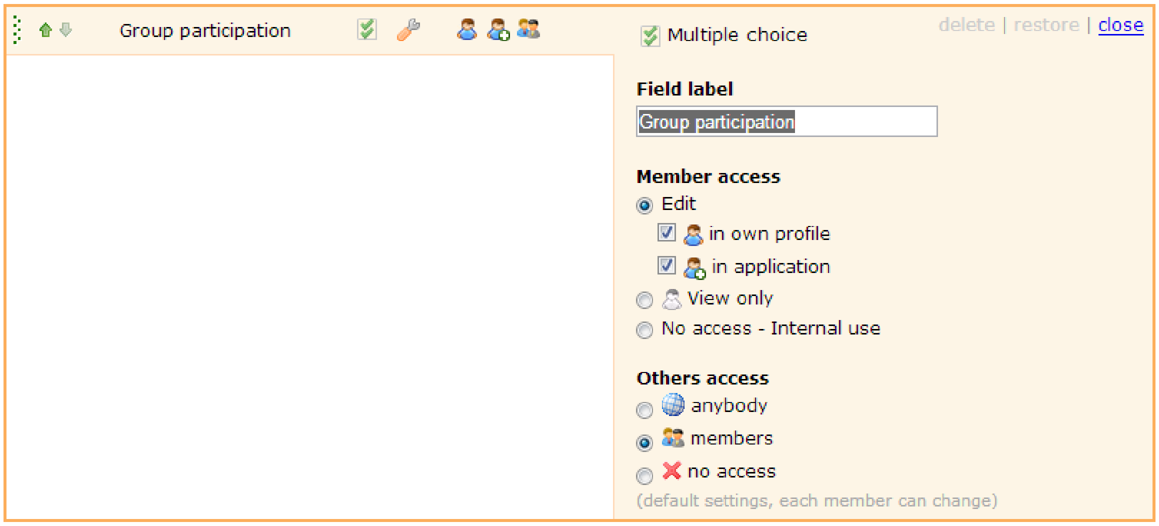
Read more/less

If you allow members to choose their member groups, you can control whether they do so from their member profile and/or the initial membership application form.



To control whether members can view and/or change their group participation, follow these steps:

1. Hover over the **Members** menu and click the **Membership fields** option.
2. Within the list of membership fields, click **Group participation**.



3. Under **Member access**, choose one of the following options:

Option	Description
Edit	Members can view and change their group participation. If you select this option, you can control whether members can choose member groups within their member profile and/or within the initial membership application.
View only	Members can view but not change their group participation within their member profile.
No access	Members can neither view nor change their group participation.

4. Click **Save all changes**.

In any case, members are not able to see who the other members of the group are.

Controlling page access by member group

You can restrict page access to selected member groups, so that only members of those groups can view the page, either through the site menu or via a direct link (URL).

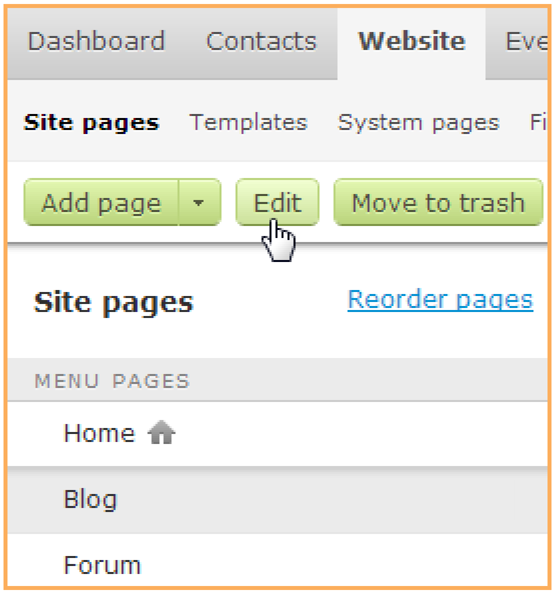
Read more/less

To restrict page access to selected member groups, follow these steps:

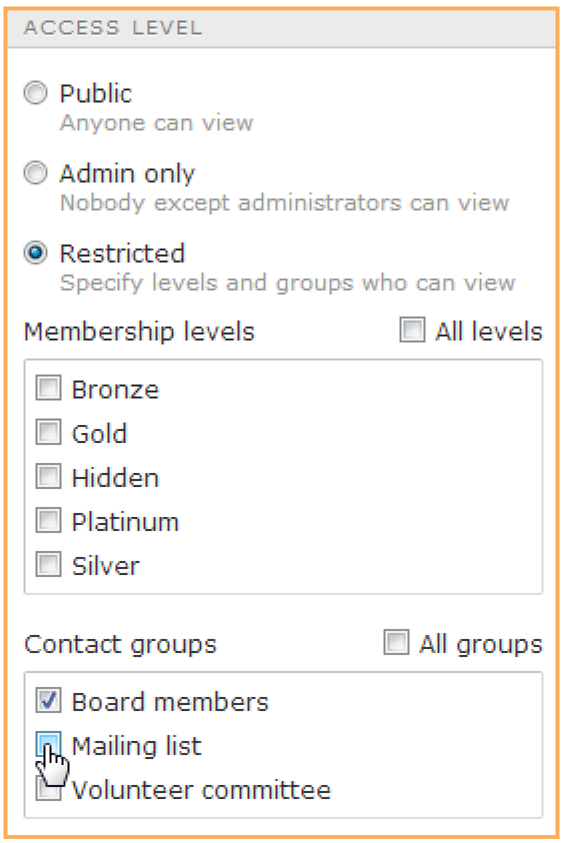
1. Hover over the **Website** menu and click the **Site pages** option that appears.
2. Within the site page list, click the page that you want to restrict access to.

> If the page you want to select is grouped under another page, you may have to click the plus sign beside the parent page to display its subpages.

3. Click the **Edit** button towards the top of the screen.



4. Within the **Access level** options that appear in the page settings on the left, click the **Restricted** option.
5. Choose the member groups – and optionally, membership levels – that can view the page.



If you restrict access by both membership levels and membership groups, then members who belong to any of the selected levels **or** groups will be able to access the page. If you check the **All levels** or **All groups** option then all levels or groups – including any levels or groups added in the future – will be selected.

6. Click the **Save** button to save your changes.

For more information, see Page access and visibility.

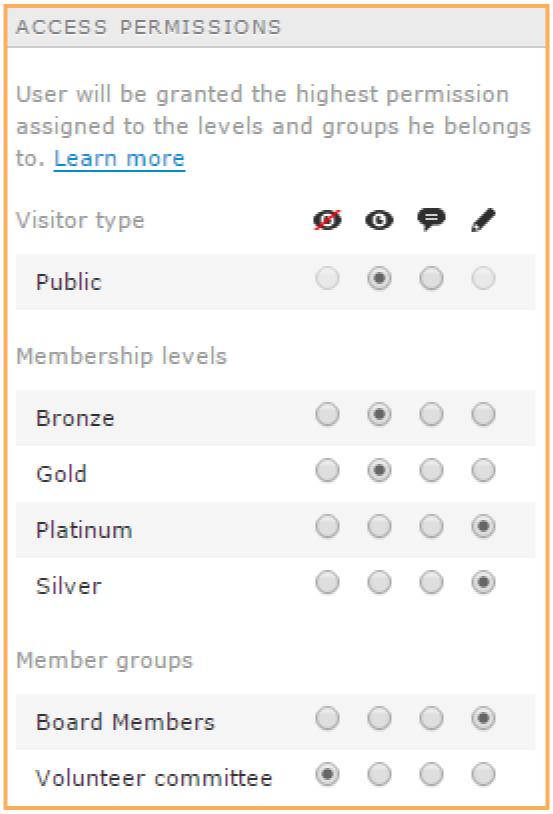
Restricting forums and blogs by member group

You can set access permissions to blogs and forums separately for public visitors, and for each membership level and member group.

Read more/less

To restrict blogs and forums by member groups, follow these steps:

1. Begin editing the page containing the blog or discussion forum gadget.
2. Hover over the blog or discussion forum gadget and click the Settings icon.
3. Within the gadget settings, under Access permissions, choose the permissions to be granted to membership levels and/or member groups.



If you restrict permissions by both membership levels and member groups, then members will be granted the highest permission assigned to the levels and groups they belong to. For example, if you provide read-only access for Bronze members but full access to members of the Volunteer Committee member group, then a Bronze member who is also a member of the Volunteer Committee will be granted full access.

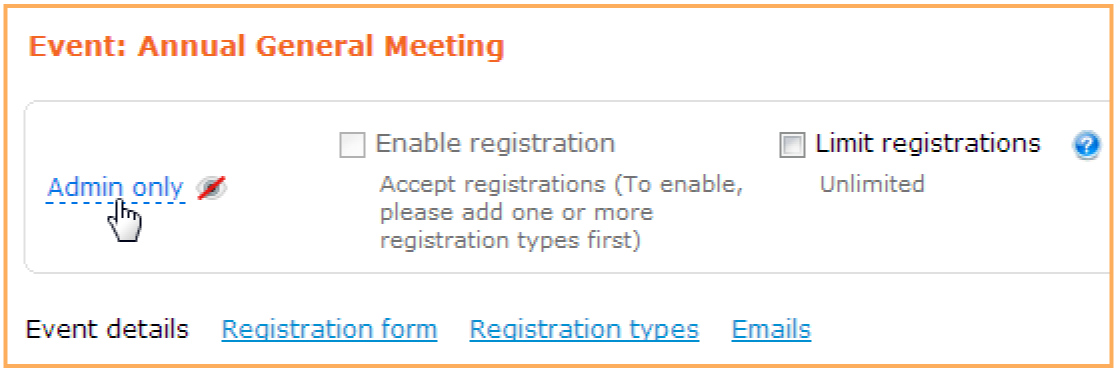
4. Click the **Save** button to save your changes.

Restricting events by member group

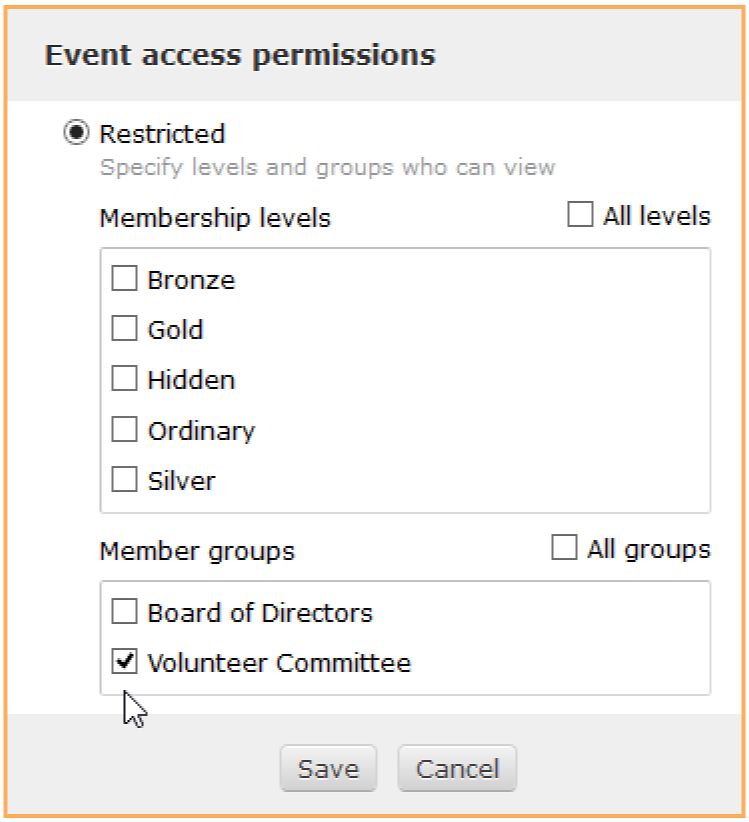
To restrict access to an event to selected member groups, follow these steps:

Read more/less

1. Hover over the **Events** menu and select the **Event list** option.
2. Select the event within the list.
3. Within the event details, click the **Admin only** or **Public** link towards the top.



4. Within the dialog that appears, click the **Restricted** option.
5. Check each of the member groups – and optionally, membership levels – you want to grant access to.



If you restrict access by both membership levels and membership groups, then members who belong to any of the selected levels **or** groups will be able to view the event.

6. Click **Save** to save your choices.
7. Click **Save** to save the changes to your event.

Sending email blasts to group members

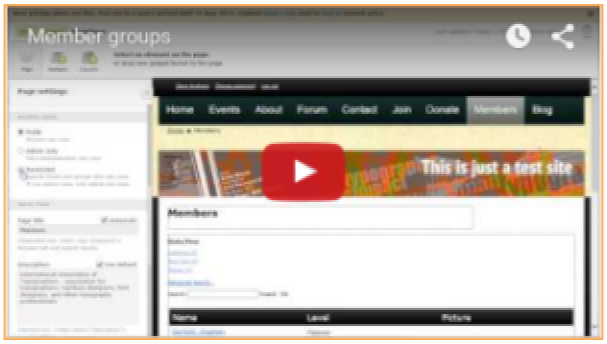
You can use member groups to create mailing lists that you can select to send an email blast to group members.

Read more/less

To send an email blast to members of a member group, follow these steps:

1. Go to the advanced member or contact search.
2. Click the **Add criteria** link.
3. Choose the **Group participation** criterion, and click **OK**.
4. Click the check box next to the member group name.
5. To save the advanced search for future email blasts, enter a name for the saved search and click the **Save** button.
6. To search without saving, just click the **Search** button.

7. Click the **Email members** or **Email contacts** button.



Member groups (7:01)

On this page:

Expand all sections

Exporting members and other contacts

Exporting members and other contacts

You can export your contact and membership data from your Wild Apricot account to a spreadsheet file. There are a number of reasons you might want to export data for members and other contacts.

- You can open the spreadsheet in Excel for further processing, analysis, formatting, or printing.
- You can use the export feature as a way of backing up your contact and membership data. The exported spreadsheet file can be imported back into Wild Apricot to restore contacts and their data.
- You can adjust data in the spreadsheet then import the modified spreadsheet as a way of making bulk updates to your contact database.

You can export all your contact or membership data, or filter your contact or member list so you can export data for the selected members or contacts only.

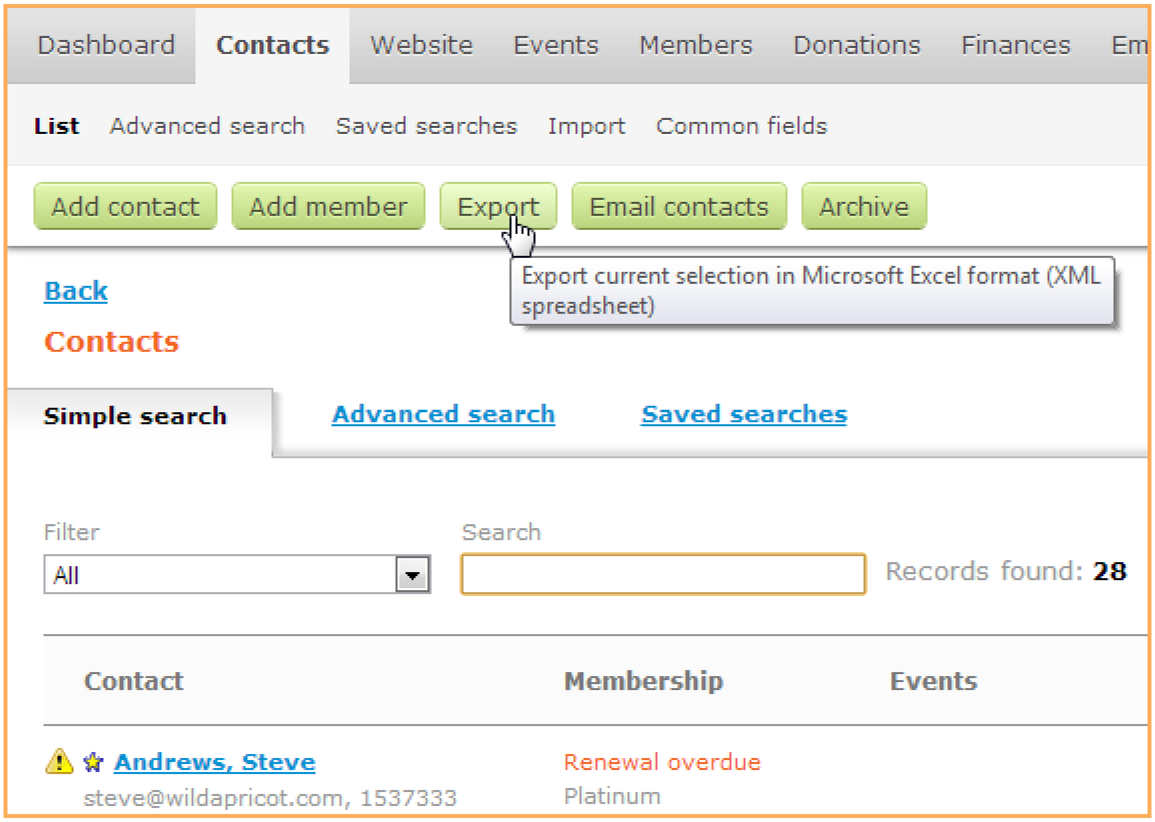
> You can also use Wild Apricot's API to create your own custom programs that automatically retrieve contact data from your Wild Apricot account.

Exporting contacts

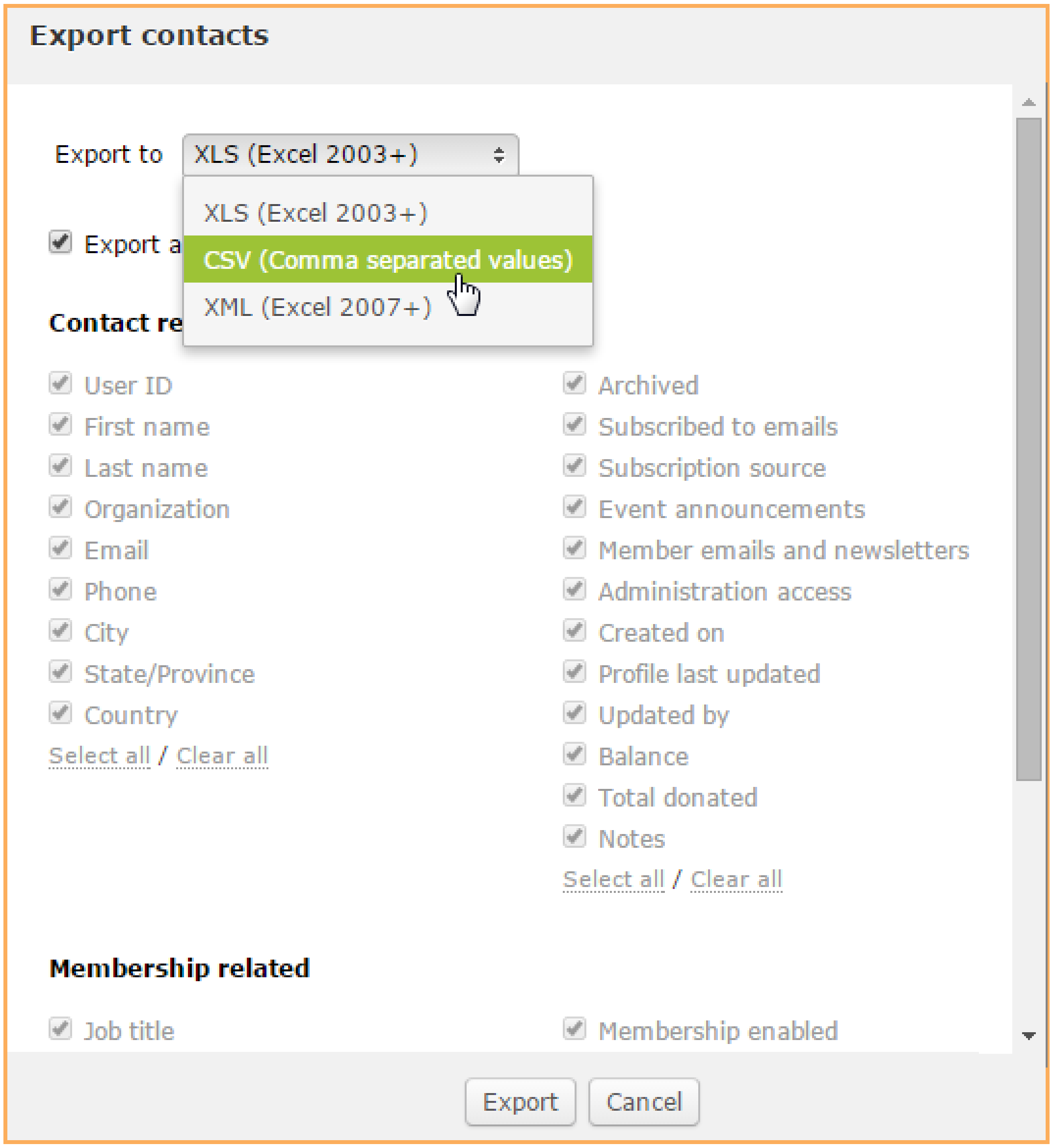
To export your contact data to a spreadsheet file, follow these steps:

Read more/less

1. Hover over the **Contacts** menu and select the **List** option.
2. If you want to export only selected contacts, filter the list.
3. Click the **Export** button.

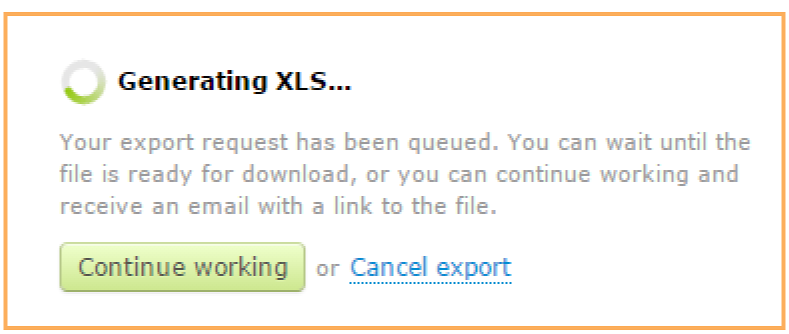


4. On the screen that appears, select the export file format – XLS, CSV, or XML.



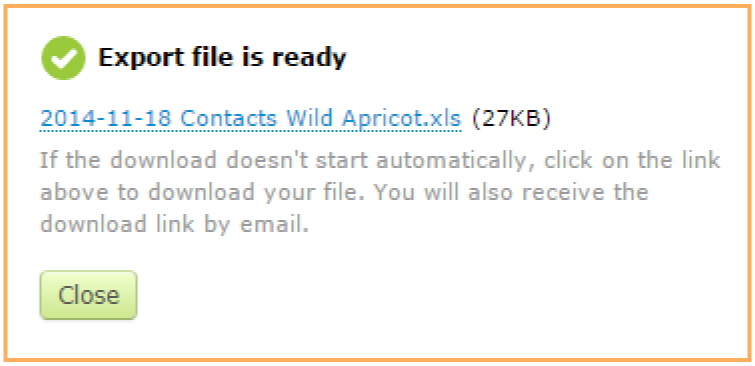
5. Choose which fields to include in the export file.
6. Click the **Export** button.

While the export file is being generated, you can click the **Continue working** button and safely switch to another Wild Apricot admin screen.



Once the file is generated, you'll receive an email with a link to the file.

If you waited until the export file was generated, the file will be automatically downloaded. As well, a dialog with a link to the file will appear, and an email with the link will be sent to you.



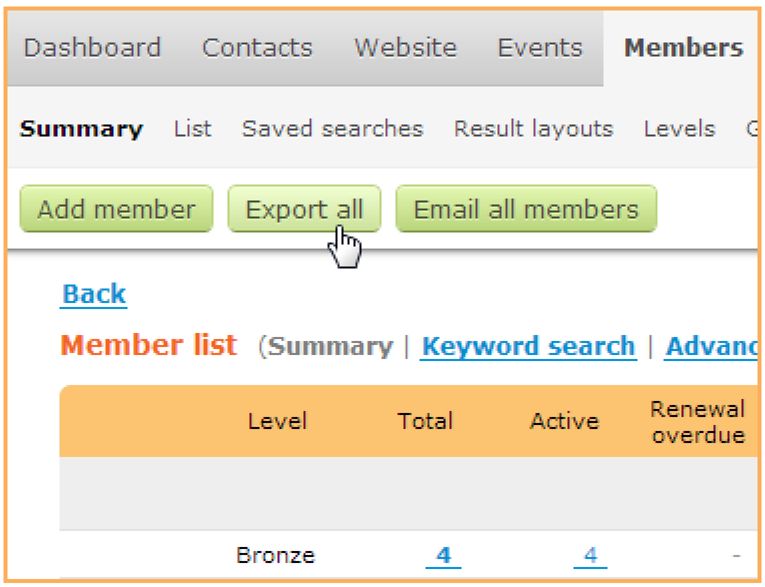
Before clicking the download link within the email, make sure you are logged into your Wild Apricot account as an administrator, and in admin view.

Exporting members

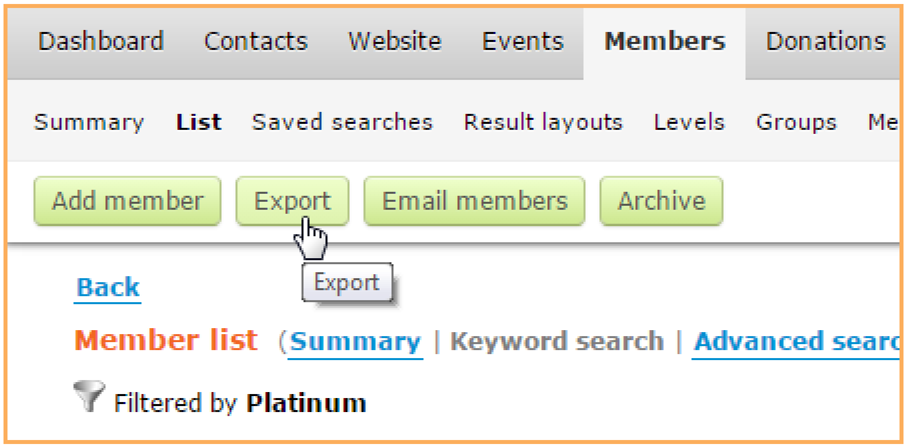
To export your member data to a spreadsheet file, follow these steps:

Read more/less

1. Hover over the **Members** menu and select the **Summary** option.
2. If you want to export all members, click the **Export all** button.



Otherwise, filter the list then click the **Export** button.



3. On the screen that appears, select the export file format – XLS, CSV, or XML.
4. Choose which fields to include in the export file.
5. Click the **Export** button .

While the export file is being generated, you can click the **Continue working** button and safely switch to another Wild Apricot admin screen. Once the file is generated, you'll receive an email with a link to the file.

If you waited until the export file was generated, the file will be automatically downloaded. As well, a dialog with a link to the file will appear, and an email with the link will be sent to you.

> ⚠ Before clicking the download link within the email, make sure you are logged into your Wild Apricot account as an administrator.

Exported columns

You can choose the columns to be exported as part of the export process.

Read more/less

You can choose from the following columns:

• User ID • First name • Last name • Organization • Email • Phone • Password • Group participation	• Archived • Subscribed to emails • Subscription source • Event announcements • Member emails and newsletters • Administration access • Created on • Profile last update	• Updated by • Balance • Total donated • Membership enabled • Membership level • Membership status • Member since • Renewal due	• Renewal date last changed • Level last changed • Access to profile by others • Details to show • Photo albums enabled • Member bundle ID or email • Member role • Notes

...plus any custom fields you have added.

Also, the Password column will be exported if you select the **Export all fields** option. The exported Password column will always be empty, but can be used to import passwords.

> ⚠ You cannot export picture fields or the photos displayed using them.

Any date fields that you export will be formatted using the date format that is selected on your Organization details screen.

On this page:

- Exporting contacts
- Exporting members

- Exported columns

Expand all sections

See also:

- Import field guide
- Bulk changes using import and export
- QuickBooks Export Settings

Searching and filtering contact and member records

Searching and filtering contact and member records

Everyone in your Wild Apricot database is a *contact* . A contact may be a member of your organization, but doesn't have to be. Instead, a contact could be a donor or event attendee without necessarily being a member.

You can search for members from the **Members** tab or the **Contacts** tab. From the **Contacts** tab, you can search for members, donors, event attendees, or any other kind of contact.

In both cases, you can perform a simple keyword search or an advanced search. Using an advanced search, you can combine multiple search criteria, and control whether any or all of the criteria needs to be met.

The advanced contact search provides more search options than the advanced member search. However, the advanced member search allows you to control the layout of the search results.

Searching and filtering contact records

To view a list of your contacts, click the **Contacts** tab.

Read more/less

If you are already on another screen within the Contacts module, click the **Contact list** option.

From the contact list, you can search for a particular contact using a simple keyword search or click the **Advanced search** tab and perform an advanced search.

From the **Simple search** tab, you can also select from a list of predefined filters to quickly display event attendees, donors, or other types of contacts.

To view the details for a particular contact, click the name of the contact within the contact list.

You can save your advanced search criteria so you can quickly and easily perform the same search again in the future (Community plans and higher).

Searching and filtering member records

When you click the **Members** tab, a summary of your membership database appears, listing the number of members, broken down by membership level and membership status .

Read more/less

When you click on a number within the summary, a list of members with that membership level and membership status will appear.

You can search for members from either the **Contacts** tab or from the **Members** tab. You can search using a simple keyword search or click the **Advanced search** tab and perform an advanced search.

To view the details for a particular member, click the name of the member within the member list.

You can save your advanced search criteria so you can quickly and easily perform the same search again in the future.

You can control the layout of the search results – which fields are displayed and in what order – by selecting a layout before running a saved search.

Next steps

Once you have your search results, you can:

- view individual member or contact details
- browse through matching member or contact records
- export matching member or contact records
- send an email to matching contact members

On this page:

Expand all sections

See also:

- Contact list
- Viewing and editing contact details
- Viewing and editing membership details
- Member list

Keyword search - Members

Keyword search - Members

You can filter your members list by entering a keyword or phrase. Only those records that match the word or phrase will be displayed.

Members are listed within the **Members** module while all contacts (which includes members, donors, email subscribers, etc.) are listed within the **Contacts** module. You can search for members from either screen, using simple or complex search criteria.

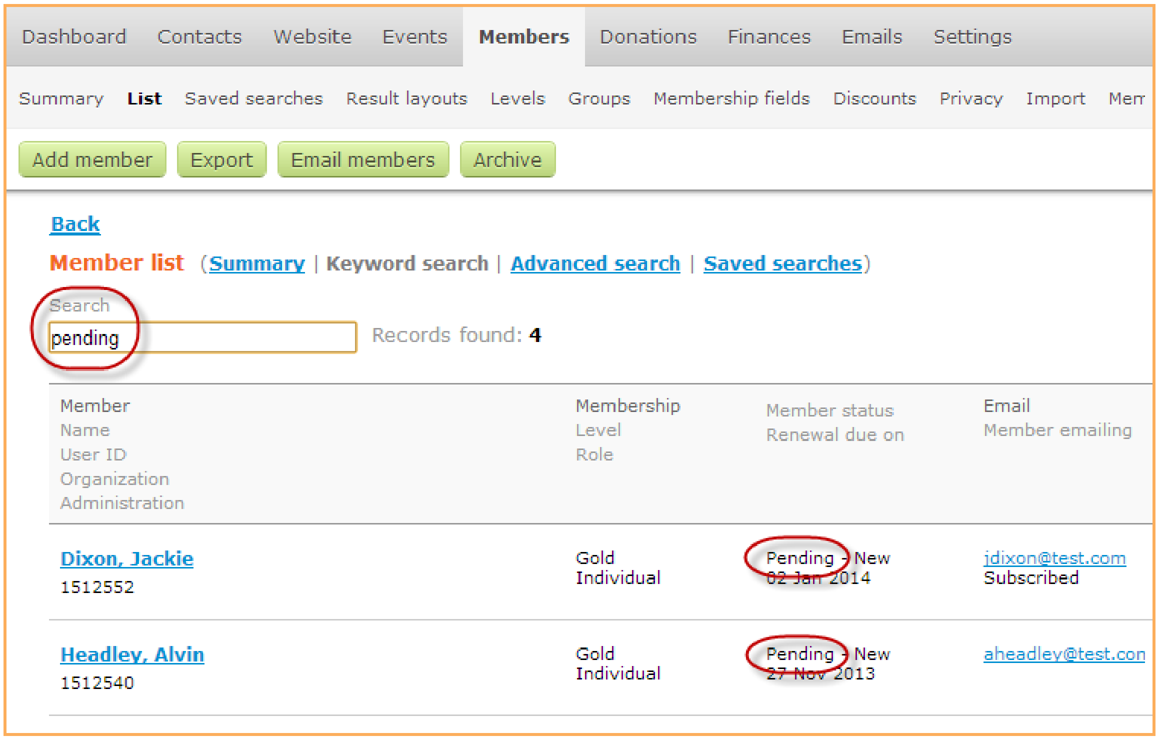
You can use a keyword search to filter the members you want to email, export, or archive.

Performing a keyword search

To perform a keyword search from the members list, hover over the **Members** menu and click **List** .

Read more/less

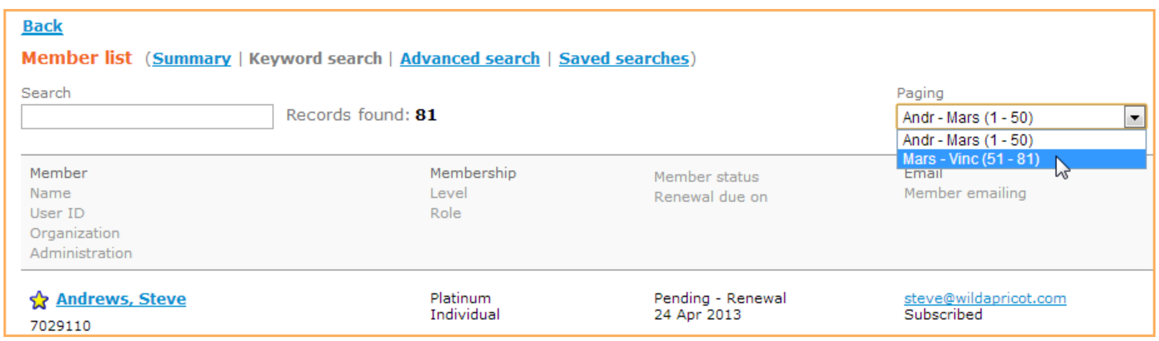
In the **Search** field, start typing the word or phrase you want to find.



Only those records that display the word or phrase will appear in the list. Information displayed elsewhere will not be searched.

The records are automatically sorted by last name. If the last name is missing, then records will be sorted by first name, then organization, and finally by user ID (aka member ID).

Your entire member list is searched, but only 100 records are displayed at a time. You can use the **Paging** drop-down list to view additional results.



Next steps

Once you have your search results, you can:

- view individual member details
- browse through matching member records
- export matching member records
- send an email to matching members
- archive matching members

On this page:

- Performing a keyword search
- Next steps

Expand all sections

Advanced search - Members

Advanced search – members

You can search for members from either the **Contacts** tab or from the **Members** tab using a simple keyword search or using an advanced search. Using the advanced search, you can combine multiple search criteria, and control whether any or all of the criteria needs to be met.

For example, you could search for:

- members whose records were updated since a particular date
- members who last logged in more than 3 months ago
- members at a particular level with a renewal due in the next week
- members from a particular state with email delivery disabled

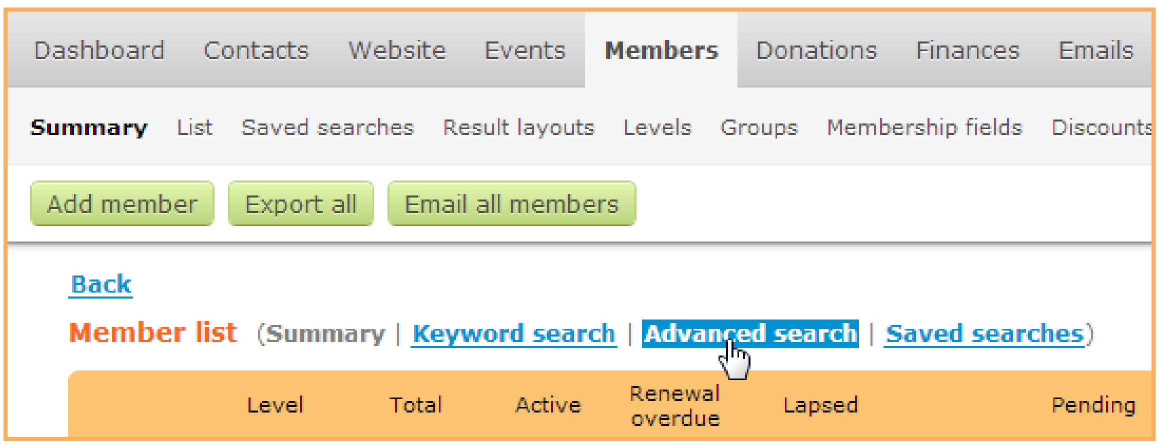
> ⓘ The advanced search within the Contacts module provides more options than within the Members module.

Initiating an advanced member search

To initiate an advanced member search, follow these steps

Read more/less

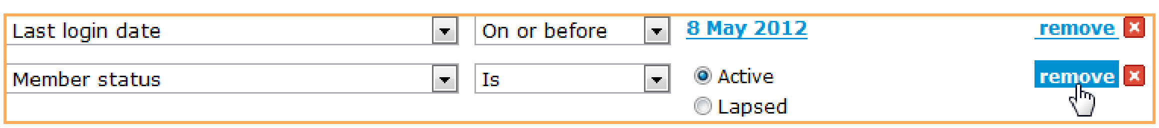
1. Hover over the **Members** menu and select either the **Summary** or **List** option.
2. Click the **Advanced search** tab.



Assembling search criteria

Performing an advanced search involves assembling multiple search criteria.

When you first visit the **Advanced search** screen, search criteria may already appear. To remove any of your search criteria, click **remove** to the right of the criteria.



To assemble your search criteria, follow these steps:

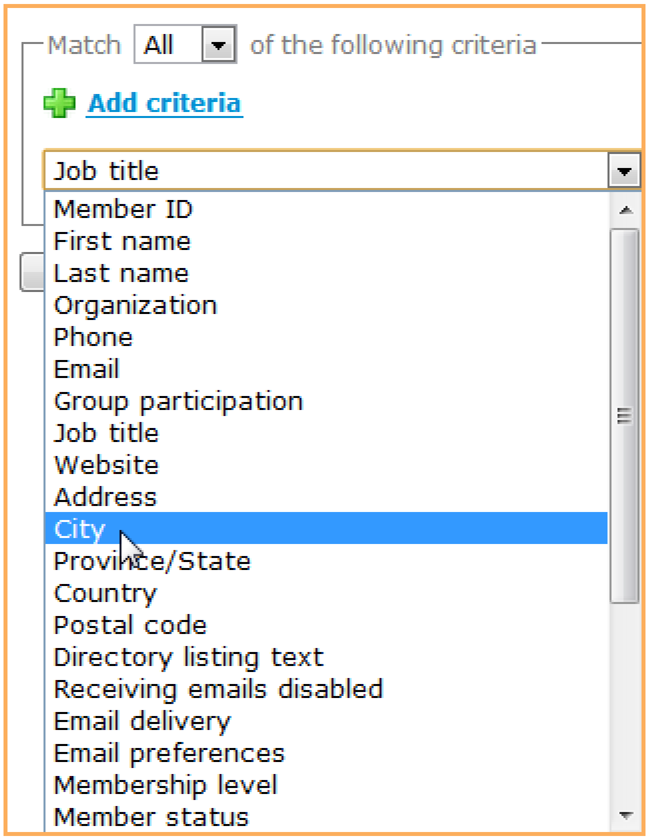
1. Select the search fields

   Read more/less

   The first step in assembling search criteria is to select the fields you want to search by. You can select search fields one at a time or all at once.

   If search criteria already appear, you can select a different search field by clicking the first drop-down and selecting the field you want to search by. To add more search criteria, click **Add criteria**.

   From the window that appears, you can select as many different search fields as you like. You can search by just about any membership field (including all custom membership fields you create yourself and other system fields) except picture fields.



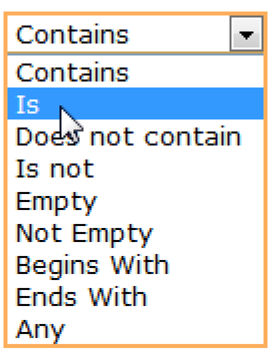
2. Choose the search operators

Read more/less

The next step in assembling the search criteria is to choose a search operator. The search operator defines the relationship between the search field you just selected, and the search value you choose in the next step.

For example, do you want the search to include records with the search value or exclude them? If you chose *City* as your search field and *Miami* as the field value, the search operator can determine whether you want to find contacts living in Miami (or Miami Beach), or whether you want to find all contacts not living in Miami (not Miami Beach).

To choose the search operator, click the operator drop-down and choose an operator. For example, if you are searching for *Mia mi*, and you want to include *Miami Beach* as well as *Miami* as a match, you'd pick **Contains**. If you just want to match *Miami* and not *Miami Beach*, you'd pick **Is**. To search for cities that are not *Miami*, choose **Does not contain** (to exclude Miami Beach as well) or **Is not** (to not exclude Miami Beach).



Depending on the search field you choose, different combinations of the following operators may appear:

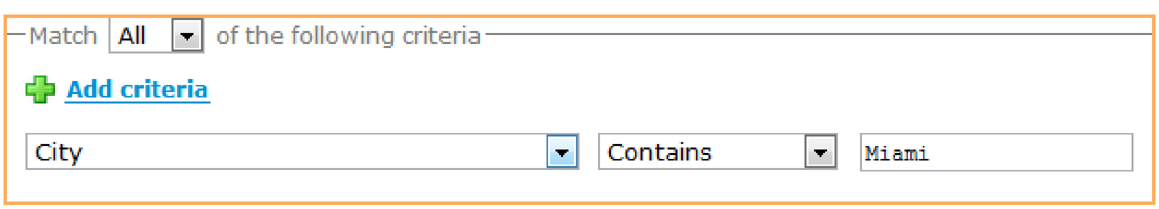
Operator	Field types	A record is a match if its value for this field...	Example
Contains	Text	Includes the search value	City contains Miami

Does not contain	Text	Does not include the search value	City does not contain Miami
Is	Text, dropdown, radio buttons	Exactly matches the search value	Member status is active
Is not	Text, dropdown, radio buttons	Does not exactly match the search value	Member status is not active
Empty	Text	Is empty	Email is empty
Not empty	Text	Is not empty	Email is not empty
Begins with	Text	Begins with the search value	Phone begins with 404
Ends with	Text	Ends with the search value	Email ends with .org
Any of the selected	Checkboxes	Is any of the selected search values	Email preferences match any of the selected options
All of the selected	Checkboxes	Includes all of the selected search values	Email preferences match all of the selected options
None of the selected	Checkboxes	Not does include any of the selected search values	Email preferences match none of the selected options
On or before	Date	Matches or precedes the search date	Last login date is on or before March 31st, 2012
On or after	Date	Matches or follows the search date	Renewal date is on or after March 31st, 2012
Any date	Date	Is any date	Last login date not empty
This month	Date	Occurs in the current month	Last login took place this month
This year	Date	Occurs in the current year	Last login took place this year
Last month	Date	Occurs in the previous month	Last login took place last month
Last year	Date	Occurs in the previous year	Last login took place last year

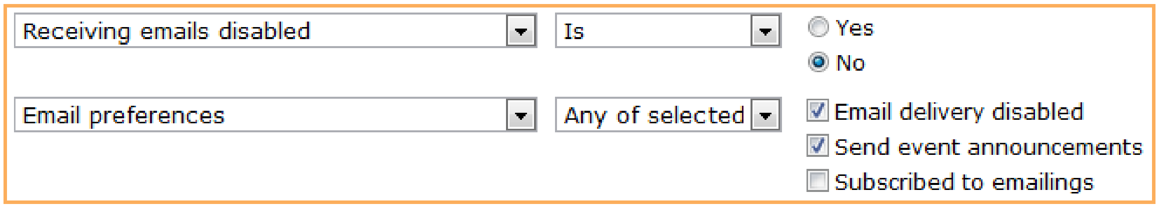
3. Specify the search value(s)

Read more/less

The next step in assembling search criteria is to specify the value to be searched for. Depending on the search field, this may involve entering a word or phrase...



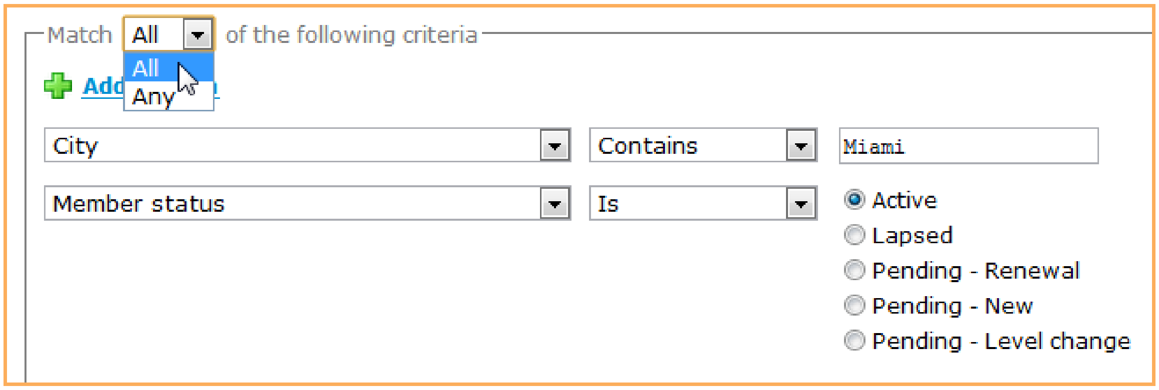
...or selecting one or more values.



4. Decide on the matching operator (any vs. all)

Read more/less

After adding multiple search criteria, you must decide whether you want to match all the criteria or any of them. Click the **Match** drop-down and choose whether you want matching records to satisfy both criteria (**All**) or either criteria (**Any**).



Choosing whether to match any or all criteria

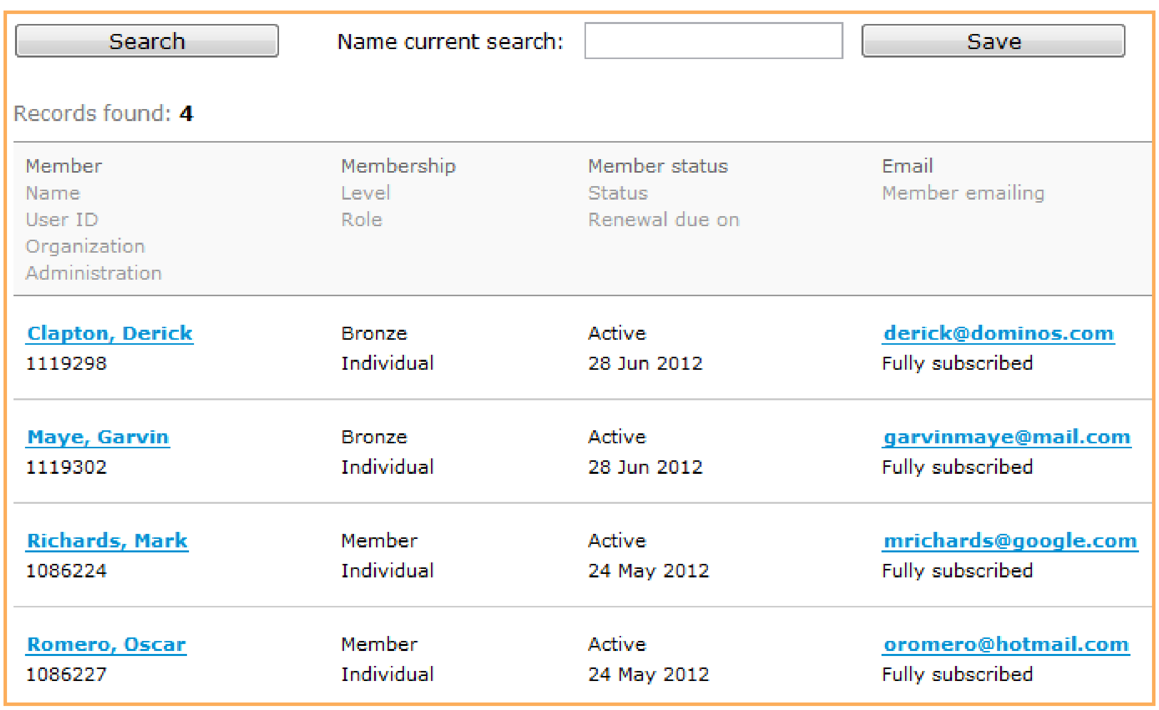
> For those familiar with boolean searches, **All** is equivalent to the boolean operator AND, and **Any** is equivalent to OR.

Executing the search

Once you have finished assembling your search criteria, click **Search** to perform the search.

Read more/less

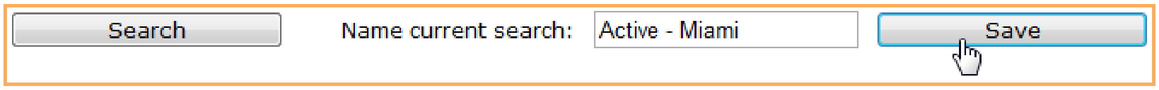
Matching records will be listed below.



Saving searches

If you want to save your search criteria so you can perform the same search again in the future, enter a name for the search then click **Save** .

Read more/less

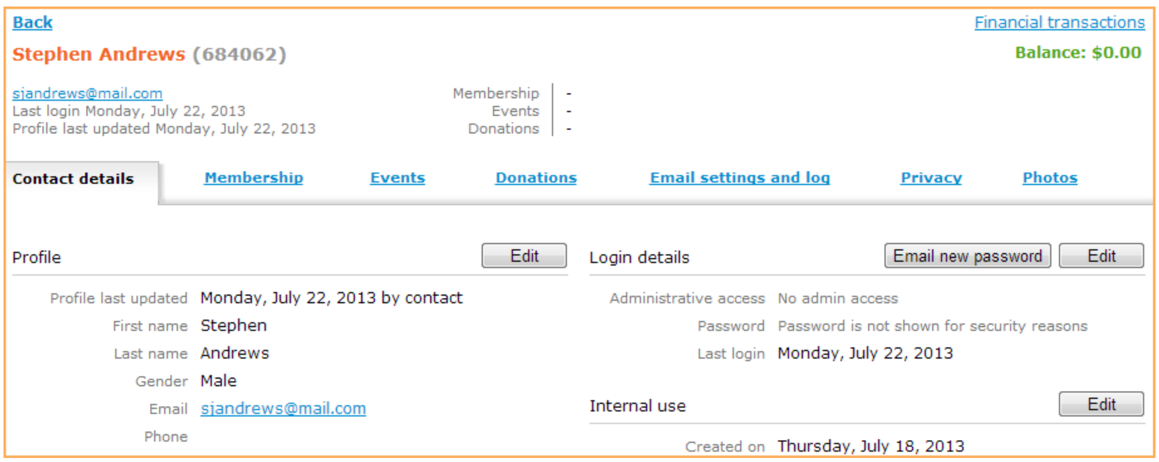


To search using a saved search, select the search from the **Saved searches** page.

Next steps

Once you have your search results, you can:

- Send an email blast to the entire search results by clicking the **Email members** button.
- Export the results to a spreadsheet by clicking the **Export** button.
- Archive the current member list by clicking the **Archive contacts in this list** button.
- View individual member details by clicking on members within the list. From the Contact details screen, you can view and edit contact information, and use the **Prev** and **Next** button to browse through other records in the list.



On this page:

Expand all sections

See also:

- Advanced search - contacts
- Saved searches - Members

Saved searches - Members

Saved searches - Members

You can search for members from the **Members** module using a simple keyword search or an advanced search. Using the advanced search, you can combine multiple search criteria, and control whether any or all of the criteria needs to be met.

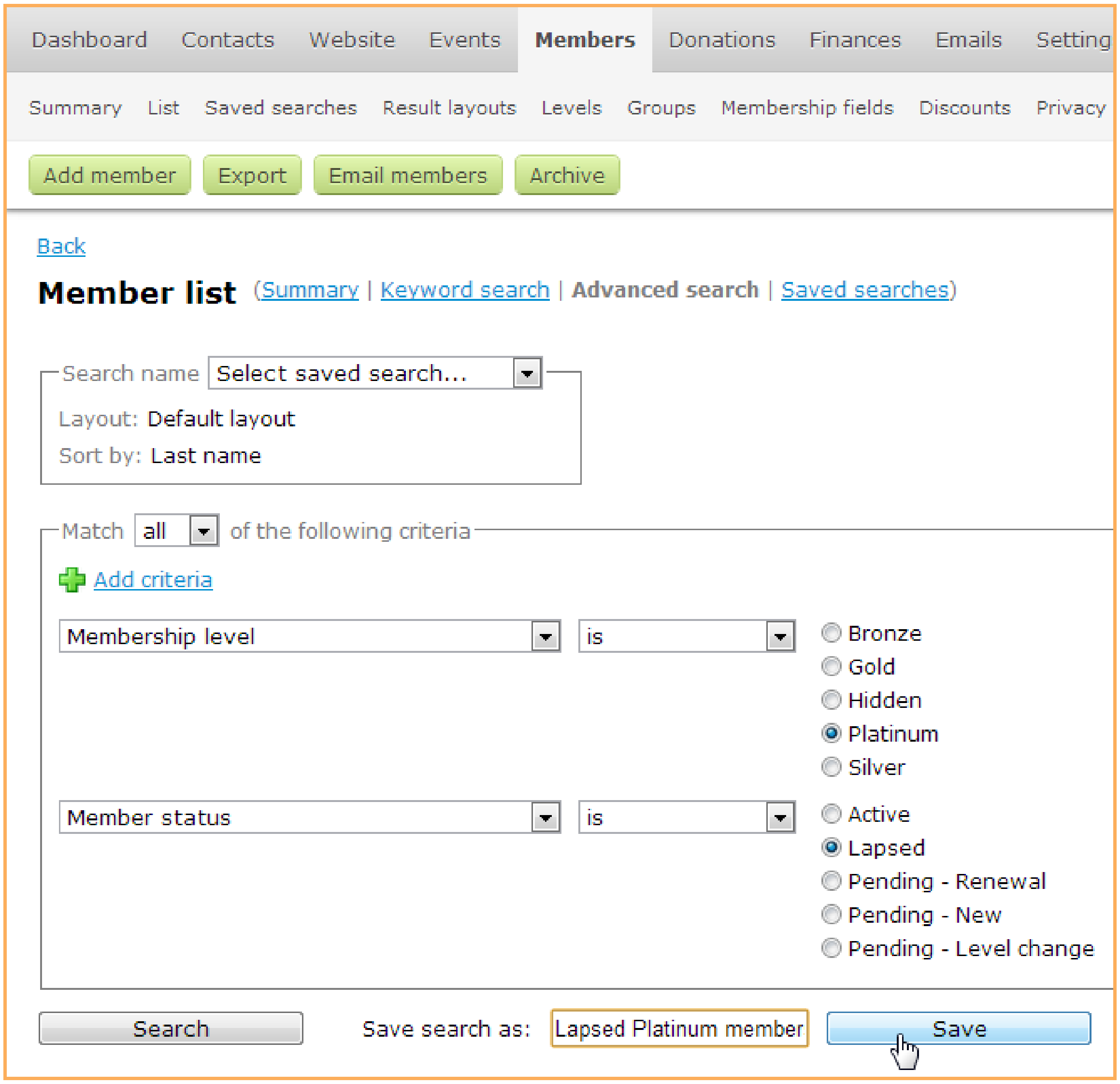
> You can also search for members from the Advanced search screen within the Contacts module. The advanced contact search provides more search options than the advanced member search. However, the advanced member search allows you to control the layout of the search results.

If you want, you can save your advanced search criteria so you can quickly and easily perform the same search again in the future. You can use saved searches to add multiple recipients when sending email blasts or scheduling event announcements, and to restrict the members listed in a member directory.

Saving advanced searches

After you have finished assembling your search criteria from the Advanced search screen, you can save your search criteria by entering a name for the search then clicking **Save**.

Read more/less



The searches you save will be available for other administrators to use.

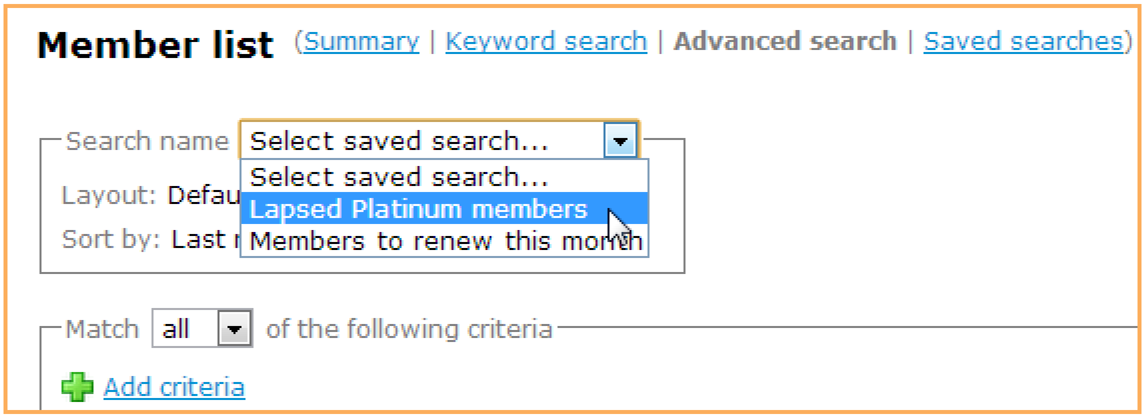
Running saved searches

Once your search is saved, you can re-run it at any time.

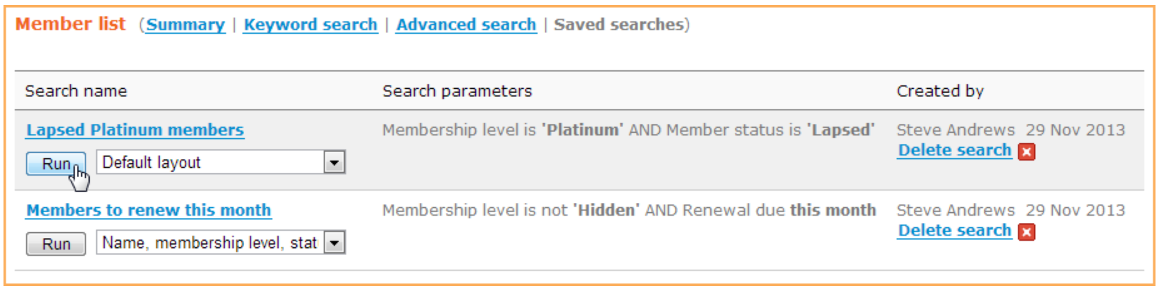
Read more/less

There are two ways you can run a saved search.

From the **Advanced search** screen, you can click the drop down labelled **Select saved search** and choose a saved search from the list.



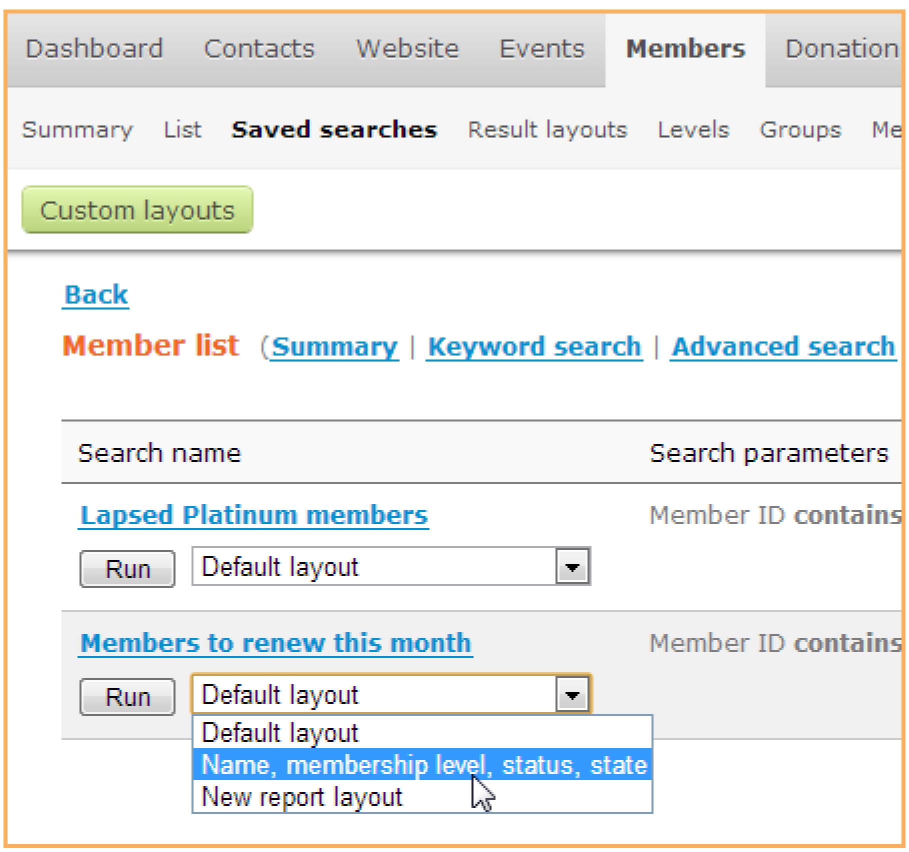
Alternatively, you can click the **Saved searches** tab then click the **Run** button below the search you want to run.



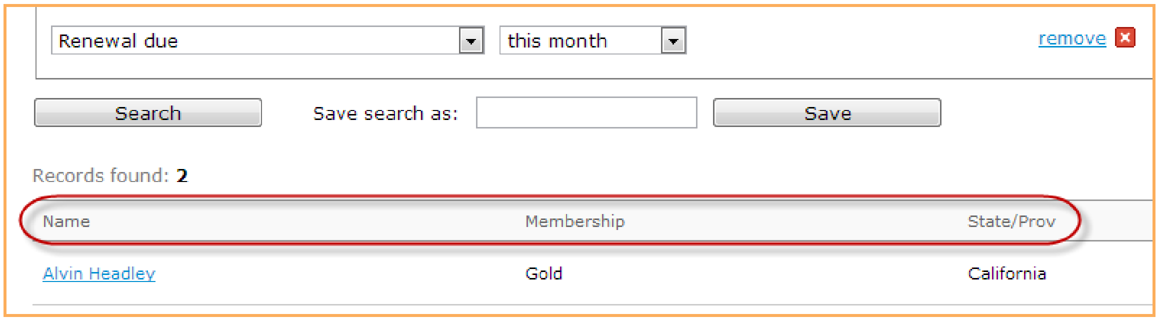
Controlling the results layout

You can control the layout of the search results – which columns are displayed and in what order – by selecting a result layout before running the search from the **Saved searches** screen.

Read more/less



Instead of the standard search results, the matching records are displayed using the information you most want to see.



For instructions on creating search result layouts, see Advanced member search layouts.

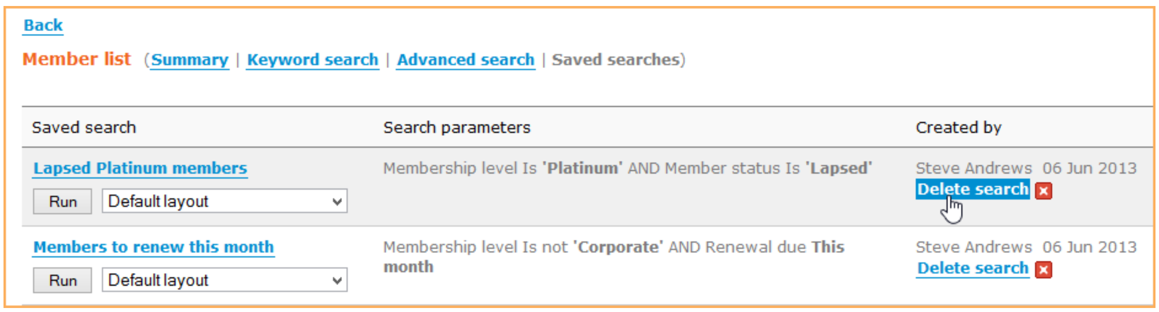
Modifying saved searches

To modify a saved search, you display it within the **Advanced search** screen, modify the search criteria, then save the search using the same name or a different name. In either case, a new saved search will be created and the original search will remain unchanged.

Deleting saved searches

To delete a saved search, click the **Delete** link to the right of the saved search name on the **Saved searches** screen.

Read more/less



On this page:

- Saving advanced searches
- Running saved searches
- Controlling the results layout
- Modifying saved searches
- Deleting saved searches

Expand all sections

Advanced member search layouts

Advanced member search layouts

When you run a saved advanced member search from the **Members** module, you can control the layout of the search results – which columns are displayed and in what order. Normally, the search results are automatically laid out in a default format.

To control the layout of the search results, you create a custom layout then select the layout before running the saved search.

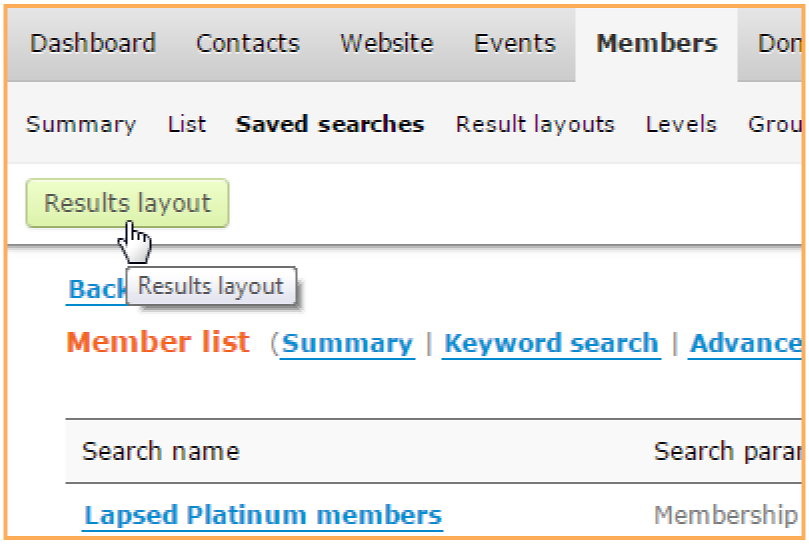
Creating custom search layouts

From the **Advanced search result layouts** screen, you can create as many custom result layouts as you want, each with a different set of fields.

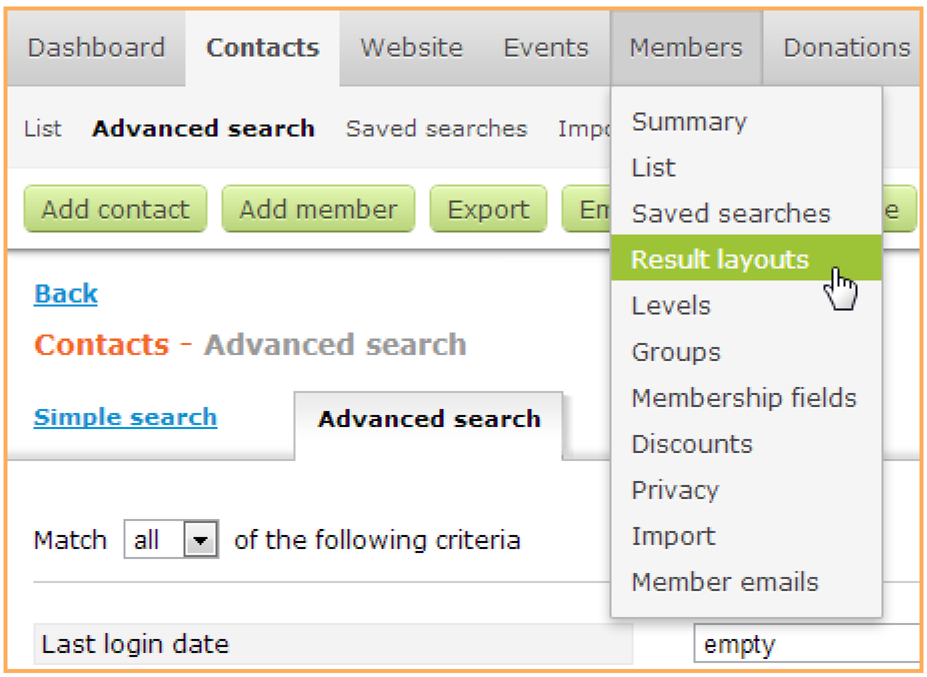
Read more/less

There are two ways to display the **Advanced search result layouts** screen.

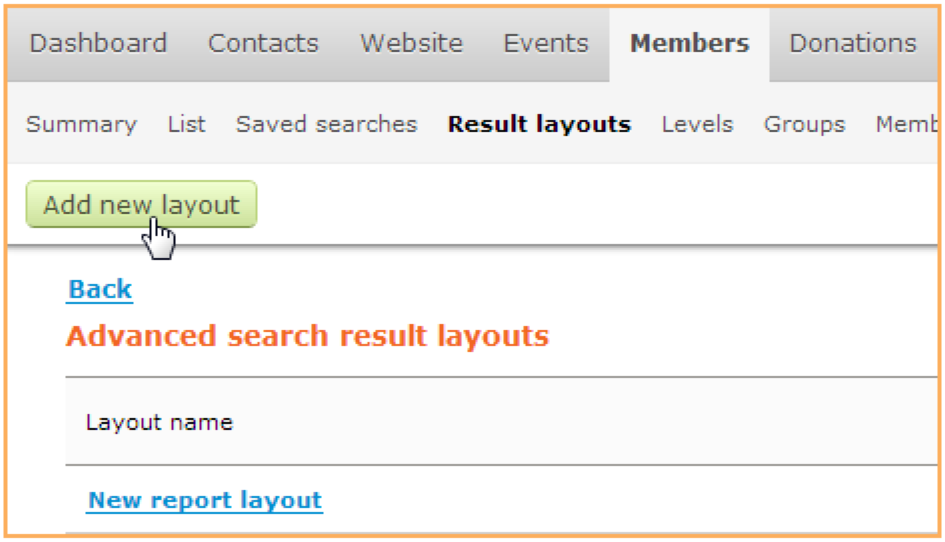
You can click the **Results layout** button from the **Saved searches** screen...



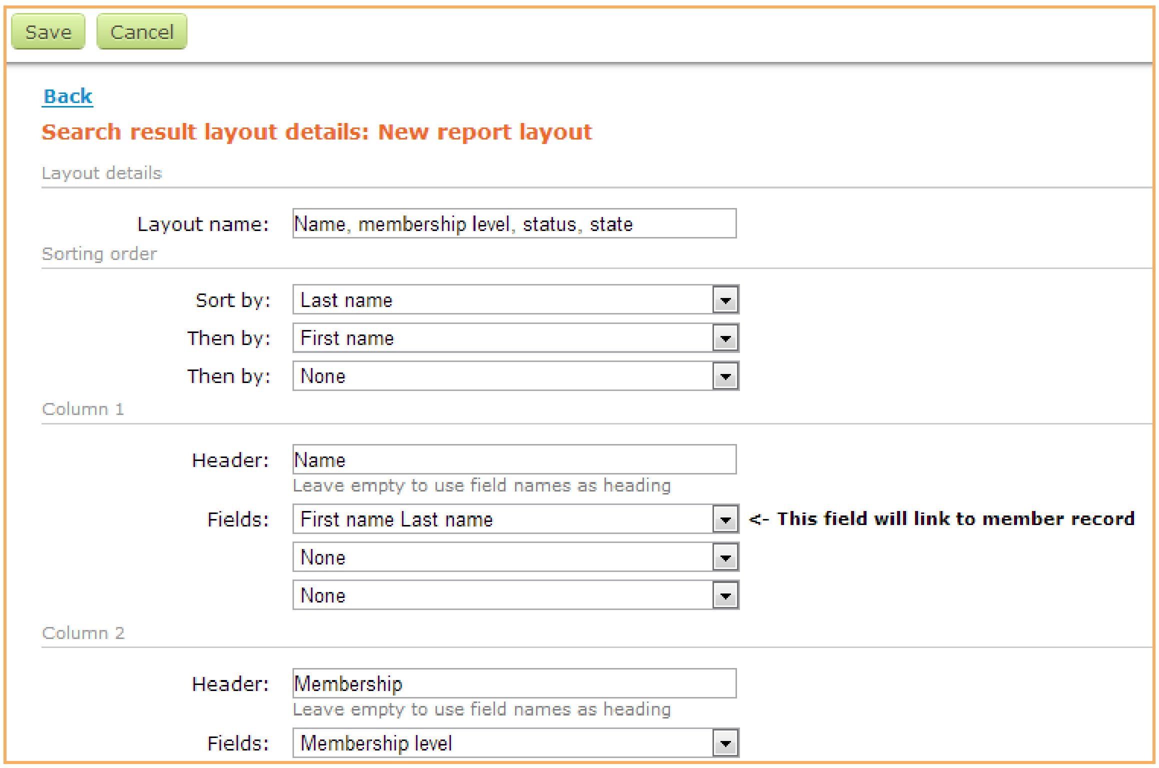
...or hover over the **Members** menu and select the **Result layouts** option.



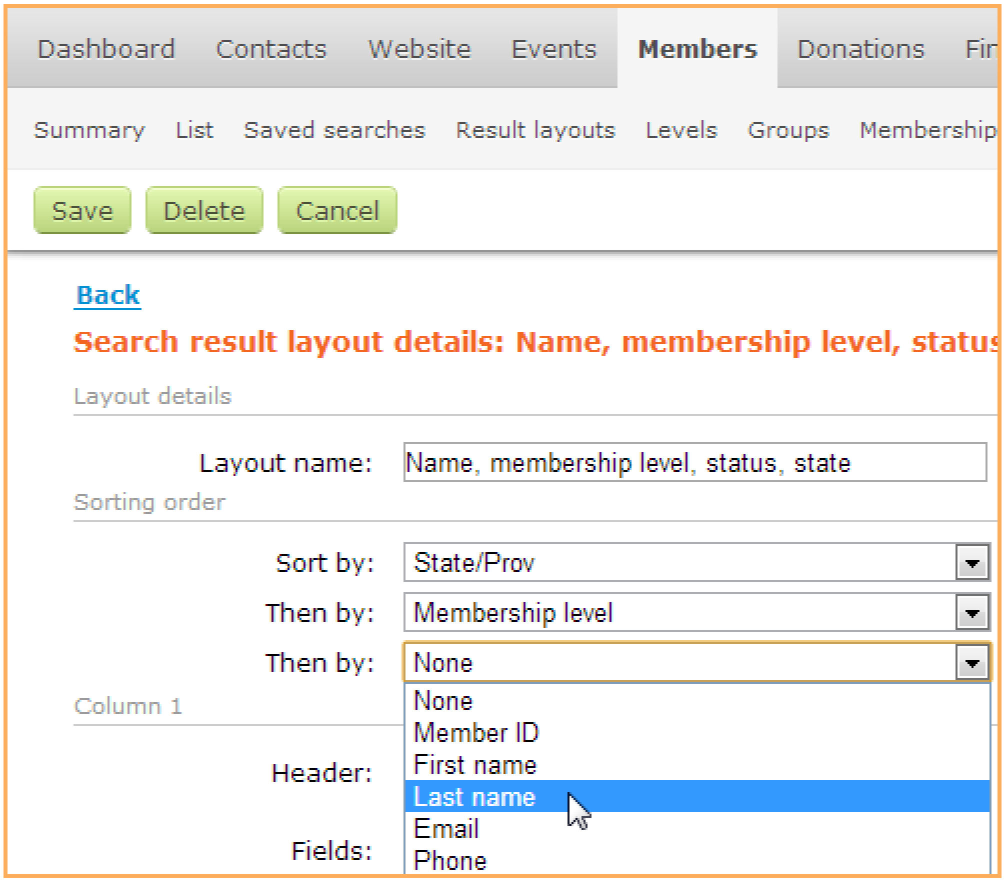
To create a new result layout, click the **Add new layout** button.



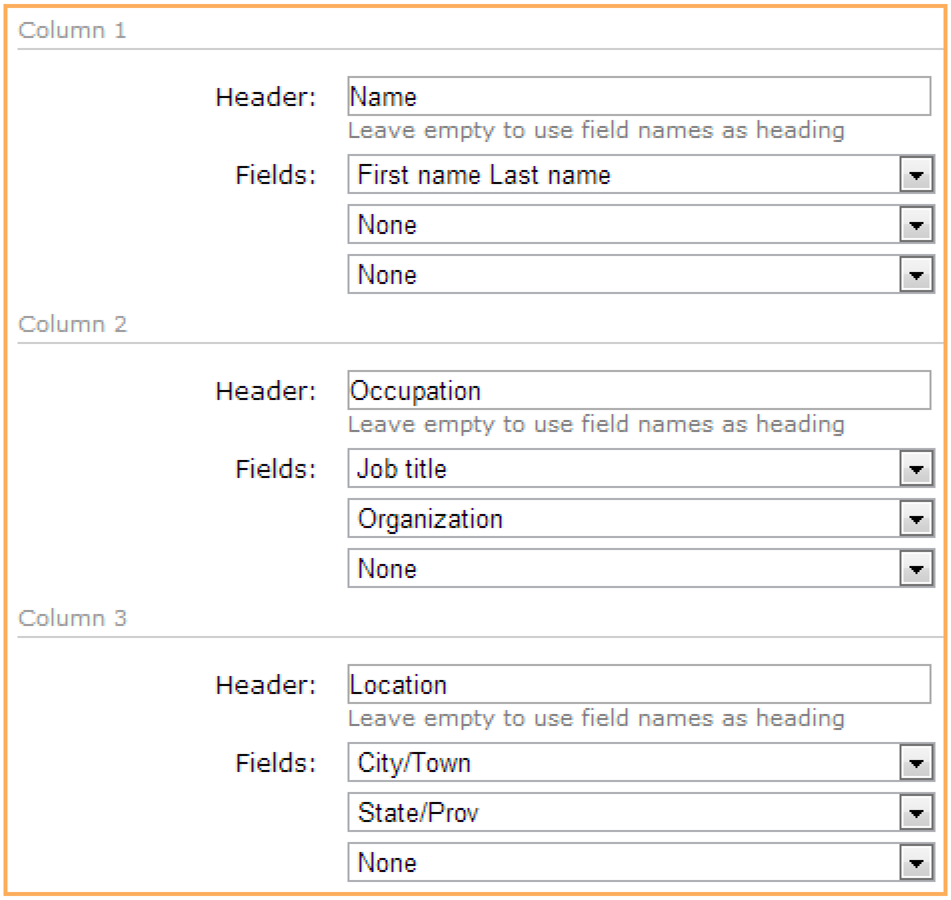
On the layout details screen, you can choose the order in which matching records are displayed, and the columns to be displayed for each record. You can also give your result layout a name.



You can specify up to 3 fields to sort records by (in ascending order), and they can be different from the fields appearing as columns within the search results. The records will be displayed in order according to the values of the first field, then any duplicate values will sorted by the second field, and so on. For example, you might want to sort by membership level then by state or province, then by name.



You can choose up to 5 columns to be displayed within the search results, and pick up to 3 database fields to be combined in each column. For example, you could combine first name and last name in column 1; job title and organization in column 2; and city and state in column 3.



You can choose any common or membership fields except multi-line text, radio button, or multiple choice fields.

For each column, you can also specify the column heading.

> The first field of the first column will automatically appear as a link to the member's public profile page.

When you are finished setting up your custom result layout, click the **Save** button.

Modifying custom result layouts

To modify an existing result layout, click it within the list on the **Advanced search result layouts** screen, then make your changes and click the **Save** button.

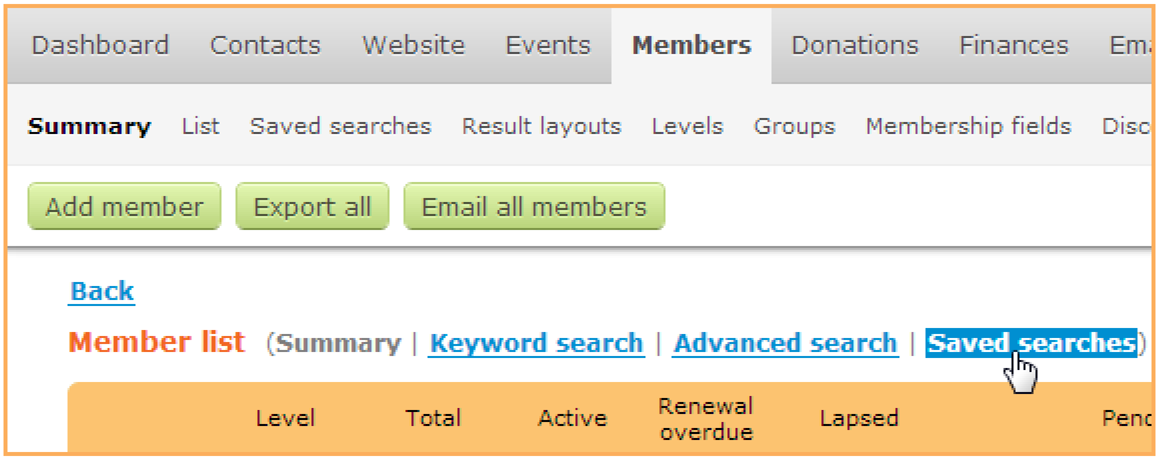
Using custom result layouts

Once you have created your custom result layout, you can apply it to one of your saved member searches.

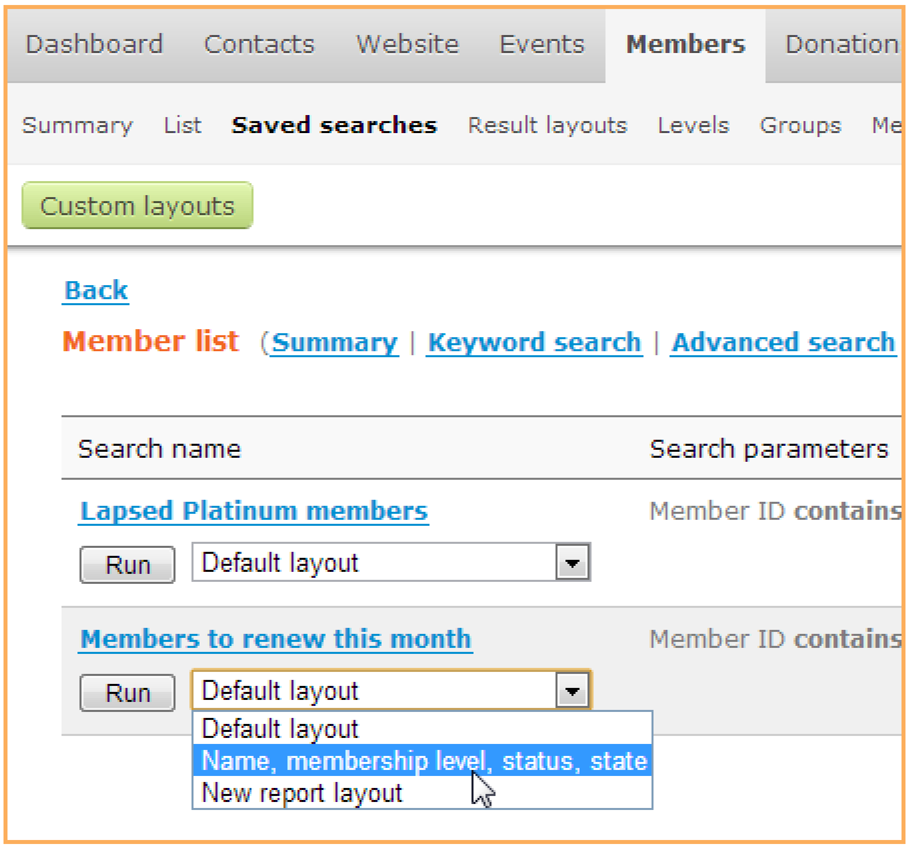
Read more/less

To apply a custom layout to a saved member search, follow these steps:

1. Click the **Saved searches** tab from the member summary or member list, or hover over the **Members** menu and select the **Save d searches** option.

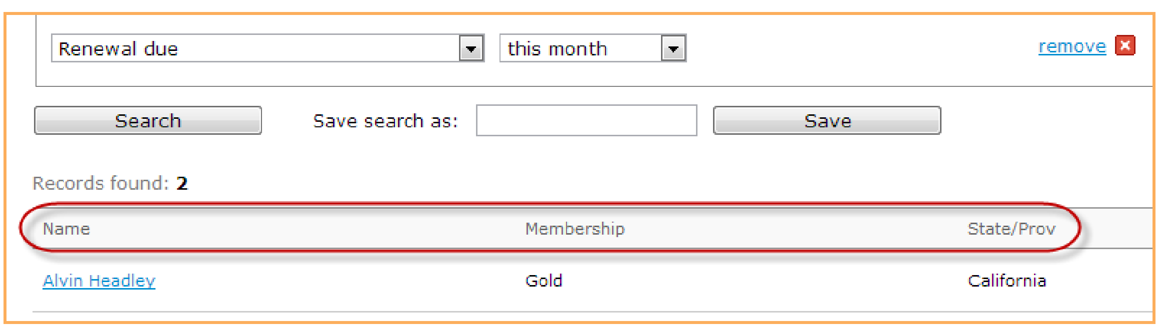


2. Select the custom layout below the name of the search you want to run.



3. Click the **Run** button beside the name of the search you want to run.

Instead of the standard search results, the matching records are displayed using the information you chose for your custom layout.



On this page:

- Creating custom search layouts
- Modifying custom result layouts
- Using custom result layouts

Expand all sections

Keyword search - Contacts

Keyword search - Contacts

You can filter your contact list by entering a keyword or phrase. Only those records that match the word or phrase will be displayed.

Members are listed on the **Members** module while all contacts (which includes members, donors, email subscribers, etc.) are listed on the **Contacts** module. You can search for members from either module, using simple or complex search criteria.

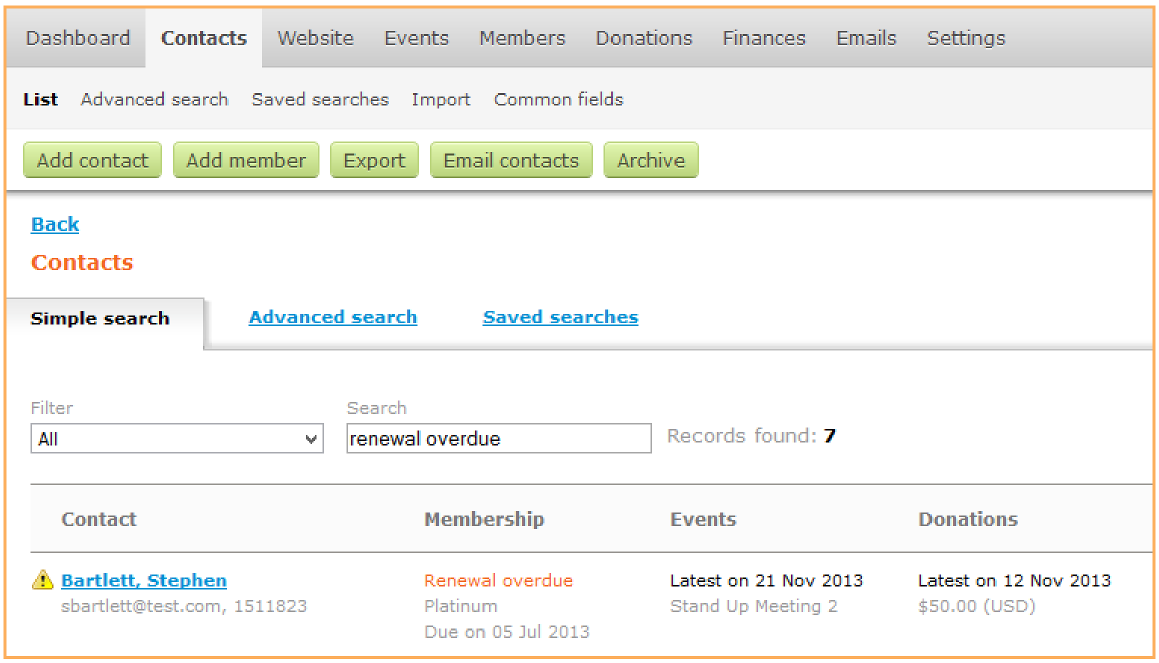
You can use a keyword search to filter the contacts you want to email, export, or archive.

Performing a keyword search

To perform a keyword search for contacts, click the **Contacts** menu then click the **List** option.

Read more/less

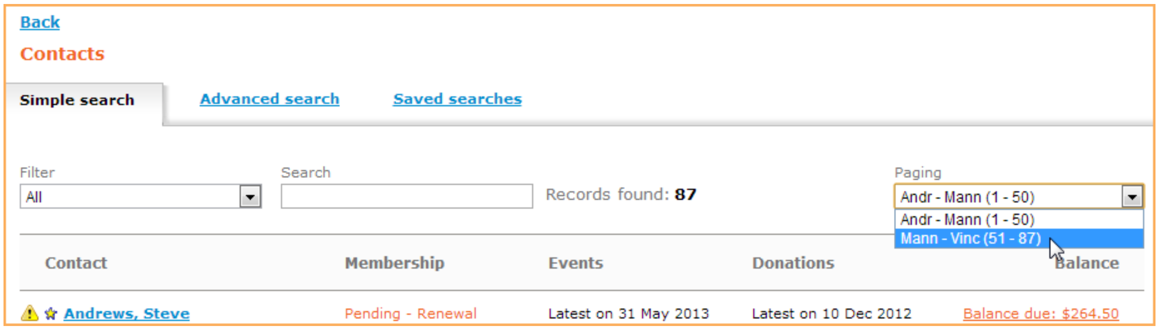
In the **Search** field, start typing the word or phrase you want to find.



Only those records that display the word or phrase on the contact list will appear in the list. Information displayed elsewhere will not be searched.

The records are automatically sorted by last name. If the last name is missing, then records will be sorted by first name, then organization, and finally by member ID (aka User ID).

Your entire contact list is searched, but only 100 records are displayed at a time. You can use the **Paging** drop-down list to view additional results.

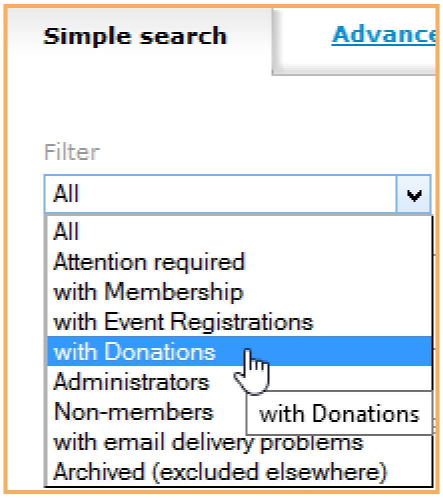


Filtering the search results

You can filter the search results using one of the predefined filters.

Read more/less

From the **Simple search** screen, click the **Filters** drop-down and choose a predefined filter.



The available filters include:

Filter	Description
All	All non-archived contacts.
Attention required	Contacts that require some action from you. For example, contacts that have applied for membership but their payment. Contacts like these are indicated by a yellow warning icon next to their name.
with Membership	Contacts that have current membership.
with Event Registrations	Contacts with current or past event registrations.
with Donations	Contacts that have made donations.
Administrators	Contacts with administrative access.
Non-members	Contacts who are not members.
with email delivery problems	Contacts to whom an email has recently failed to be sent.
Archived (excluded elsewhere)	Contacts that have been archived. In the search results these contacts will be grayed out to indicate they are not active.

To view a list of contacts with suspended membership, select **All** from the **Filter** drop-down, and then do a keyword search on the word *Suspended*.

Next steps

Once you have your search results, you can:

- view individual contact details
- browse through matching contact records
- export matching contact records
- send an email to matching contacts
- archive matching contacts

On this page:

- Performing a keyword search
- Filtering the search results
- Next steps

Expand all sections

Advanced search - Contacts

Advanced search – contacts

You can search for members from either the **Contacts** module or from the **Members** module using a simple keyword search or an advanced search. Using the advanced search, you can combine multiple search criteria, and control whether any or all of the criteria needs to be met. You can save your search criteria so you can perform the same search again in the future.

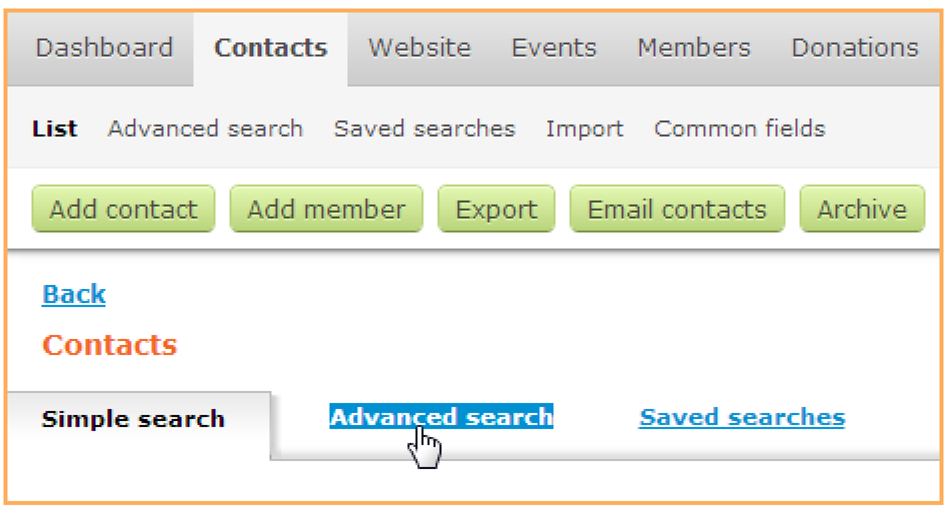
- The advanced search within the Contacts module provides more options than the advanced search within the Members module.
- Archived contacts are included in the search results unless explicitly excluded using the **Contact properties** criteria.

Initiating an advanced contact search

To initiate an advanced contact search, follow these steps:

Read more/less

1. Hover over the **Contacts** menu and select the **List** option.
2. Click the **Advanced search** tab.

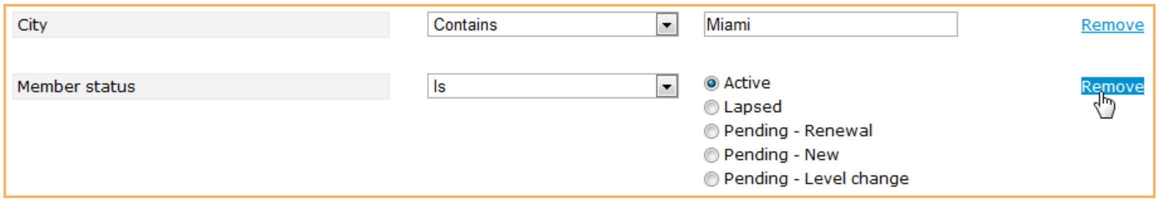


For Professional and Enterprise membership plans, the **Advanced search** page is displayed by default when you click the **Co ntacts** menu.

Assembling search criteria

Performing an advanced search involves assembling multiple search criteria.

To remove any of your search criteria, click **Remove** to the right of the criteria.



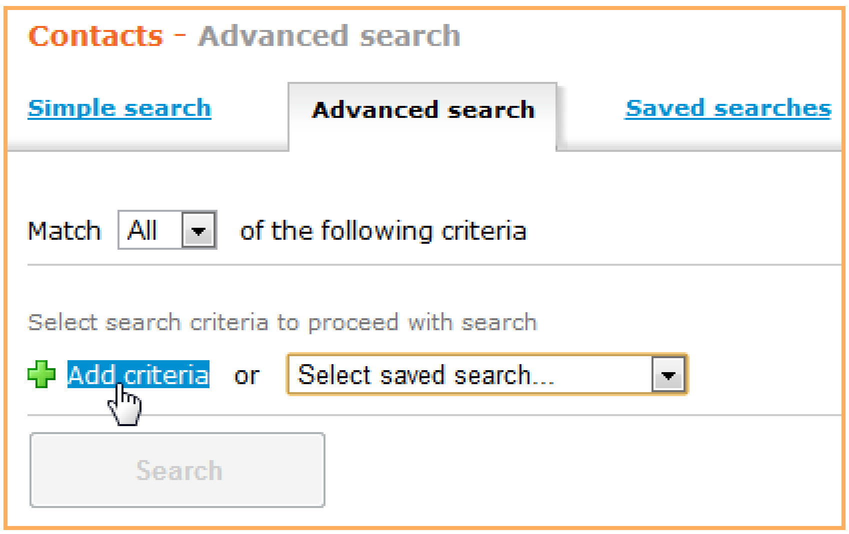
To assemble your search criteria, follow these steps:

1. Select the search fields

   Read more/less

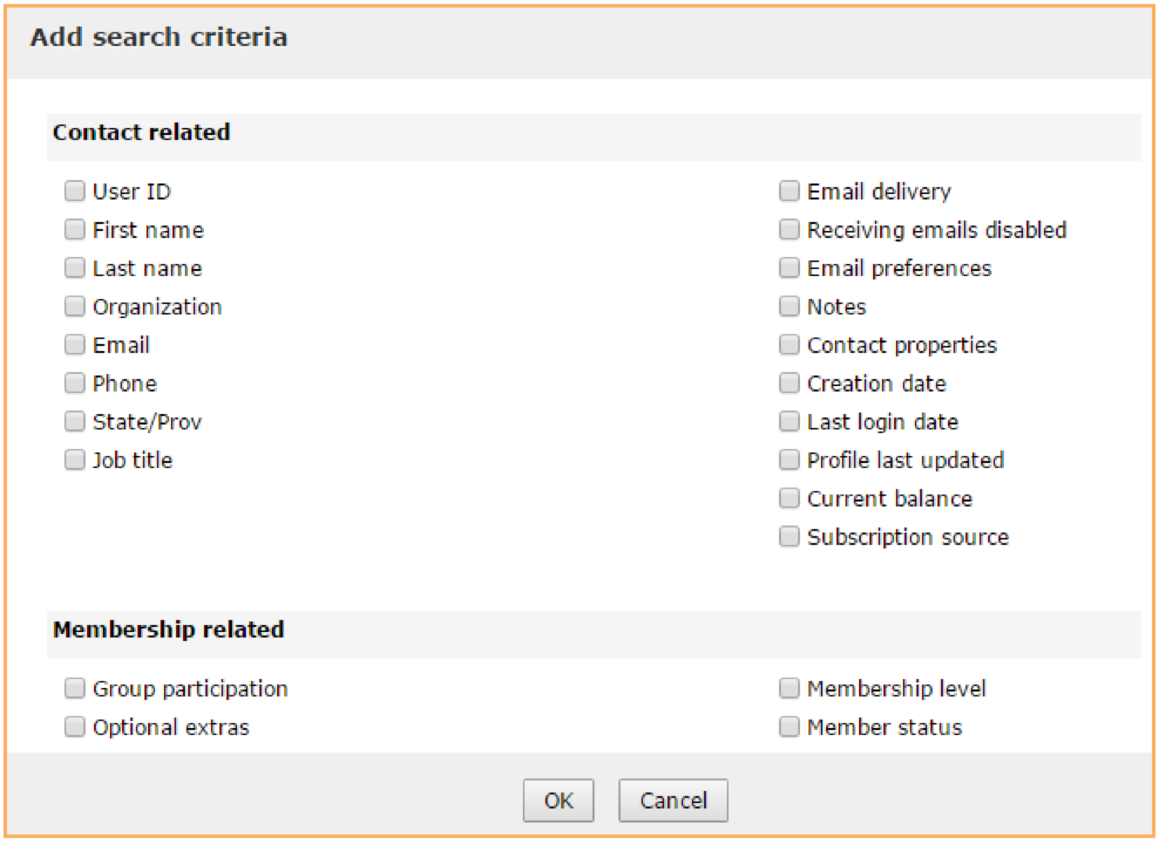
   The first step in assembling search criteria is to select the fields you want to search by. You can select search fields one at a time or all at once.

   To select search fields from the **Advanced search** page, click **Add criteria**.

   From the dialog that appears, select the field(s) you want to search by then click **OK**. You can select as many different search fields as you like.

   The search fields are divided into **Contact related**, **Membership related**, **Events related**, and **Donations related** fields. The **C ontact related** section includes all common fields (including those you created yourself), along with a number of system fields. The **Membership related** section includes all membership fields (including those you created yourself), along with a number of system fields. The other sections consist solely of system fields.



You can search by each field except picture fields.

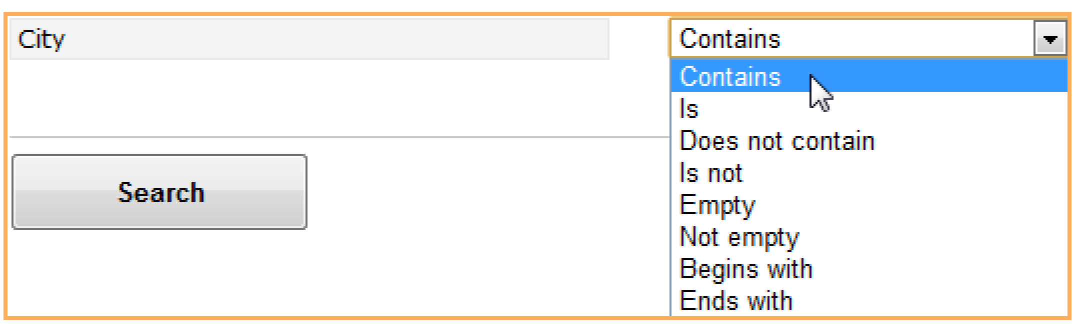
2. Choose the search operators

Read more/less

The next step in assembling the search criteria is to choose a search operator. The search operator defines the relationship between the search field you just selected, and the search value you choose in the next step.

For example, do you want the search to include records with the search value or exclude them? If you chose *City* as your search field and *Miami* as the field value, the search operator can determine whether you want to find contacts living in Miami (or Miami Beach), or whether you want to find all contacts not living in Miami (not Miami Beach).

To choose the search operator, click the operator drop-down and choose an operator. For example, if you are searching for *Mia mi*, and you want to include *Miami Beach* as well as *Miami* as a match, you'd pick **Contains**. If you just want to match *Miami* and not *Miami Beach*, you'd pick **Is**. To search for cities that are not *Miami*, choose **Does not contain** (to exclude Miami Beach as well) or **Is not** (to not exclude Miami Beach).



Depending on the search field you choose, different combinations of the following operators may appear:

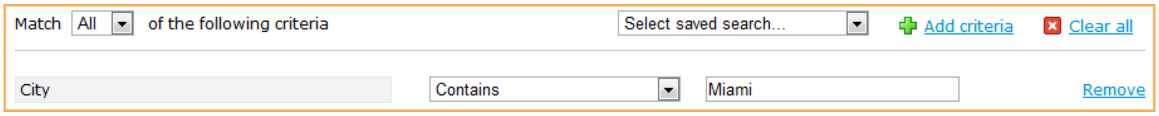
Operator	Field types	A record is a match if its value for this field...	Example
Contains	Text	Includes the search value	City contains Miami

Does not contain	Text	Does not include the search value	City does not contain Miami
Is	Text, dropdown, radio buttons	Exactly matches the search value	Member status is active
Is not	Text, dropdown, radio buttons	Does not exactly match the search value	Member status is not active
Empty	Text, date	Is empty	Email is empty
Not empty	Text, date	Is not empty	Email is not empty
Begins with	Text	Begins with the search value	Phone begins with 404
Ends with	Text	Ends with the search value	Email ends with .org
Any of the selected	Checkboxes	Is any of the selected search values	Is registered for any of the selected events
All of the selected	Checkboxes	Includes all of the selected search values	Is registered for all of the selected events
None of the selected	Checkboxes	Not does include any of the selected search values	Is registered for none of the selected events
On or before	Date	Matches or precedes the search date	Last login date is on or before March 31st, 2012
On or after	Date	Matches or follows the search date	Renewal date is on or after March 31st, 2012
Any date	Date	Is any date	Latest donation date not empty
This month	Date	Occurs in the current month	Latest donation took place this month
This year	Date	Occurs in the current year	Latest donation took place this year
Last month	Date	Occurs in the previous month	Latest donation took place last month
Last year	Date	Occurs in the previous year	Latest donation took place last year
Great than or equal	Count	Is equal to or greater than the search value	Event registrations count is greater than or equal to 1
Less than or equal	Count	Is equal to or less than the search value	Event registrations count is less than or equal to 1
Equal to	Count	Is equal to the search value	Event registrations count is 0
Not equal to	Count	Is not equal to the search value	Event registrations count is not 0

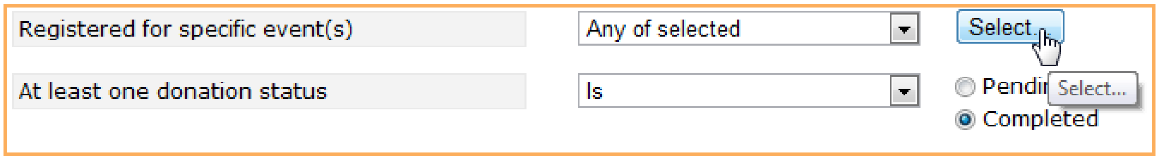
3. Specify the search value(s)

   Read more/less

   The final step in assembling search criteria is to specify the value to be searched for. Depending on the search field, this may involve entering a word or phrase...



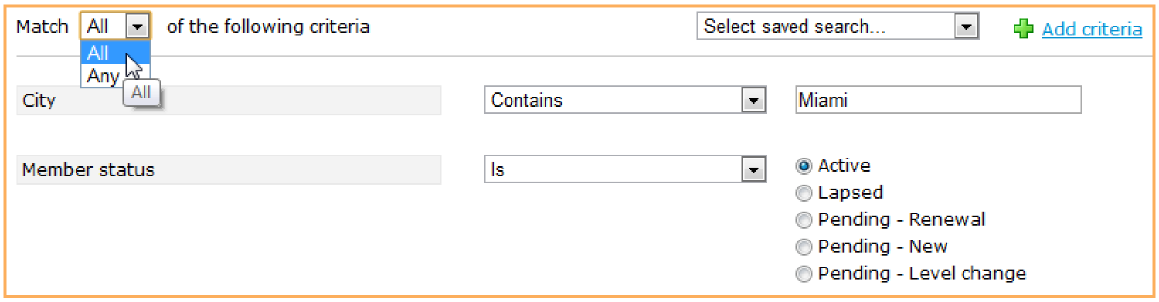
...or selecting one or more values.



4. Decide on the matching operator (any vs. all)

   Read more/less

   After adding multiple search criteria, you must decide whether you want to match all the criteria or any of them. Click the **Match** d rop-down and choose whether you want matching records to satisfy both criteria (**All**) or either criteria (**Any**).



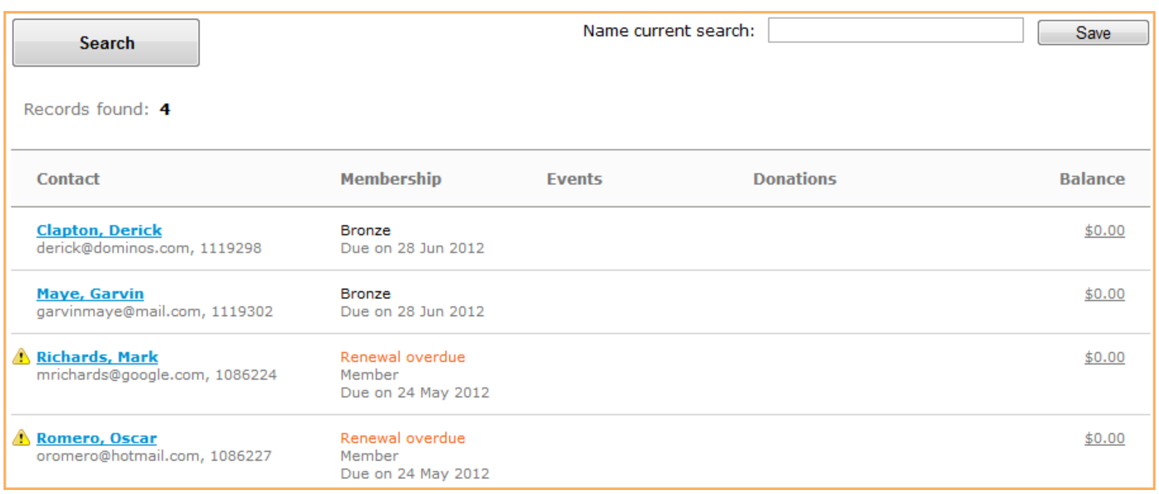
For those familiar with boolean searches, **All** is equivalent to the boolean operator AND, and **Any** is equivalent to OR.

Executing the search

Once you have finished assembling your search criteria, click **Search** to perform the search.

Read more/less

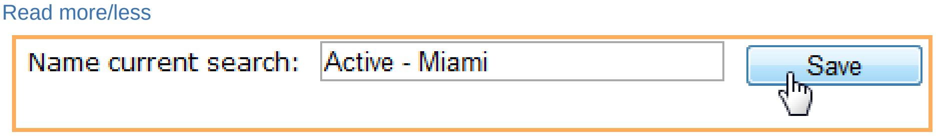
Matching records will be listed below.



Saving searches

If you want to save your search criteria so you can perform the same search again in the future, enter a name for the search then click **Save** .

Read more/less



To search using a saved search, select the search from the **Select saved search** drop-down or from the **Saved searches** page.

Next steps

Once you have your search results, you can:

- Send an email blast to the entire search results by clicking the **Email contacts** button.
- Export the results to a spreadsheet by clicking the **Export** button.
- Archive the current contact list by clicking the **Archive contacts in this list** button.
- View individual contact details by clicking on contacts within the list. From the Contact details screen, you can view and edit contact information, and use the **Prev** and **Next** button to browse through other contact records in the list.

On this page:

- Initiating an advanced contact search
- Assembling search criteria
- Executing the search
- Saving searches
- Next steps

Expand all sections

See also:

- Advanced search - members
- Searching and filtering contact and member records
- Saved searches - contacts

Saved searches - Contacts

Saved searches - Contacts

You can search for members and other contacts from the **Contacts** module using a simple keyword search or an advanced search . Using the advanced search, you can combine multiple search criteria, and control whether any or all of the criteria needs to be met.

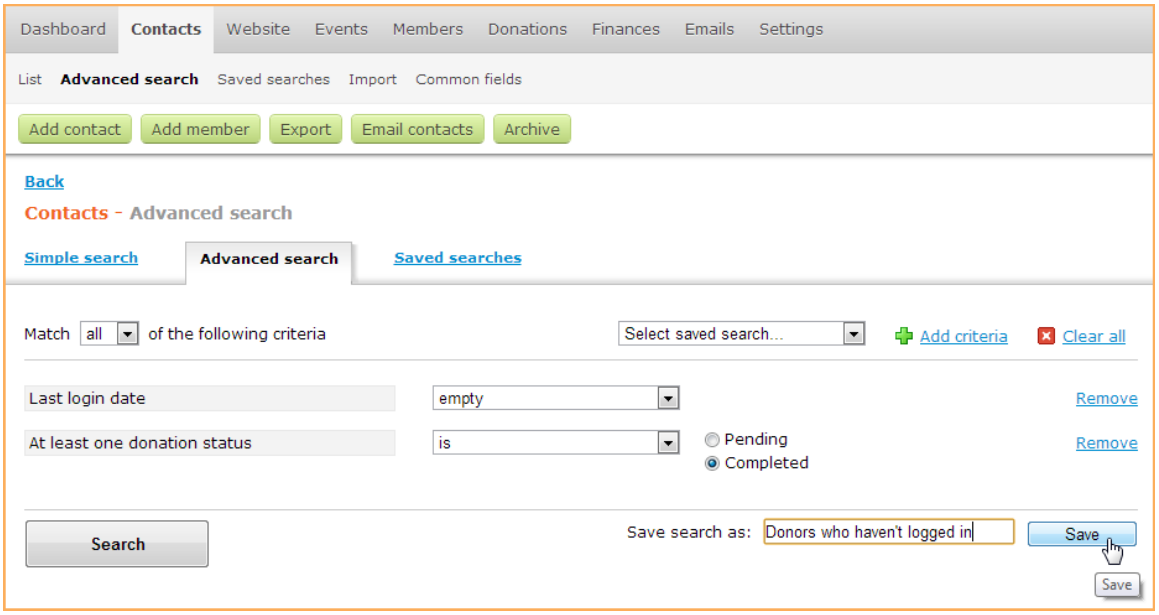
If you want, you can save your advanced search criteria so you can quickly and easily perform the same search again in the future.

You can use saved searches to add multiple recipients when sending email blasts or scheduling event announcements.

Saving advanced searches

After you have finished assembling your search criteria from the Advanced search screen, you can save your search criteria by entering a name for the search then clicking **Save** .

Read more/less



The searches you save will be available for other administrators to use.

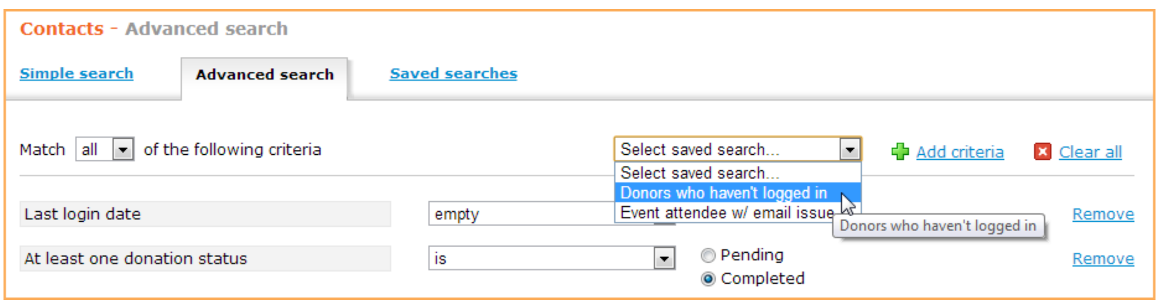
Running saved searches

Once your search is saved, you can re-run it at any time.

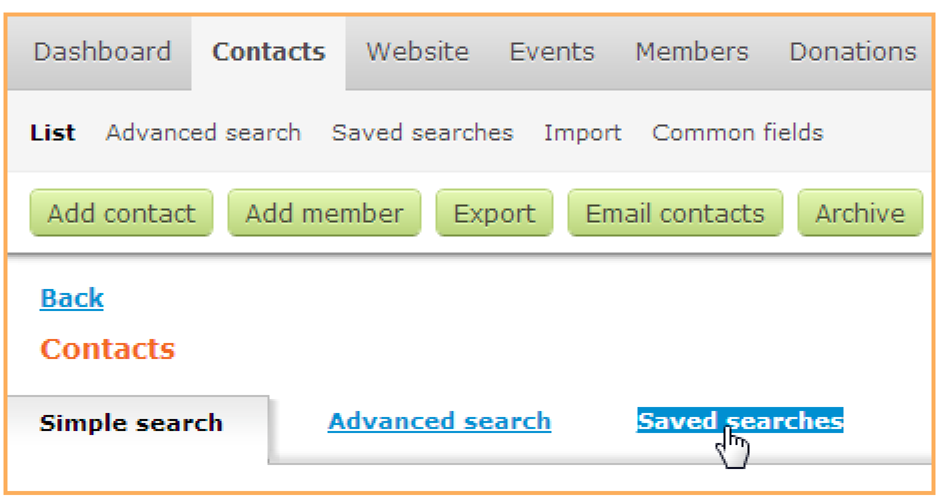
Read more/less

There are two ways you can run a saved search.

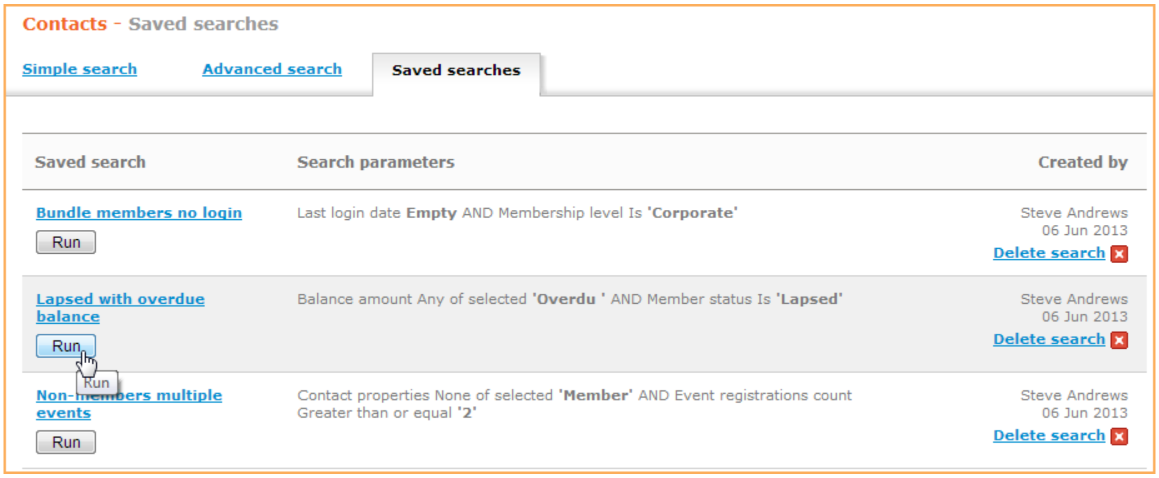
From the **Advanced search** screen, you can click the drop down labelled **Select saved search** and choose a saved search from the list.



Alternatively, you can click the **Saved searches** tab...



...then click the **Run** button below the search you want to run.



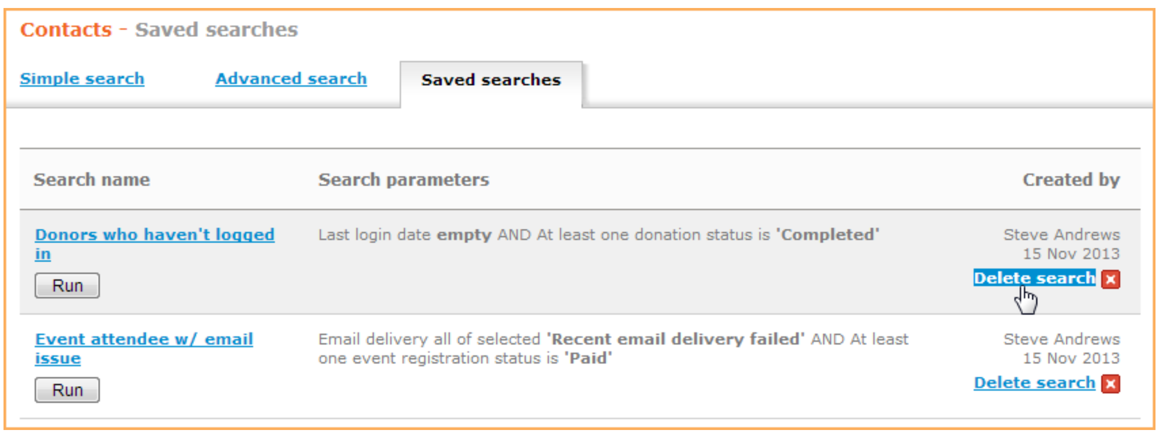
Search criteria such as **last month** or **this year** are relative to the actual date when you run the saved search.

Modifying saved searches

To modify a saved search, you display it within the **Advanced search** screen, modify the search criteria, then save the search using the same name or a different name. In either case, a new saved search will be created and the original search will remain unchanged.

Deleting saved searches

To delete a saved search, click the **Delete** link to the right of the saved search name on the **Saved searches** screen.



On this page:

- Saving advanced searches
- Running saved searches
- Modifying saved searches
- Deleting saved searches

Expand all sections

Viewing and editing contact details

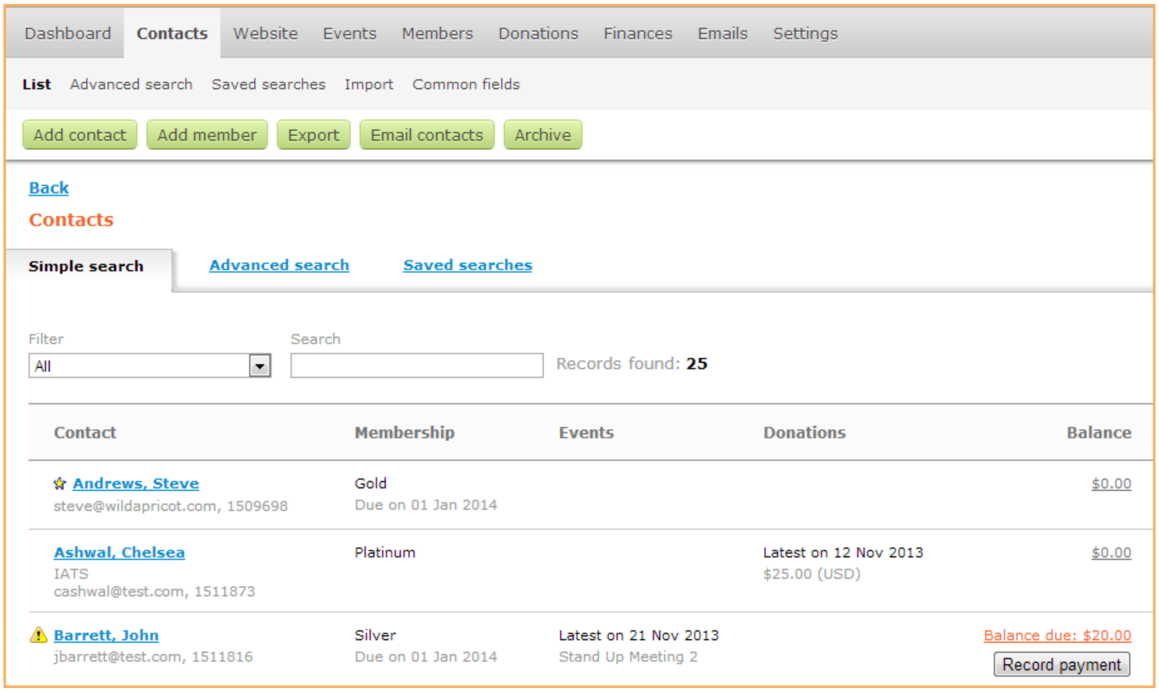
Viewing and editing contact details

Information about each contact is stored in a separate *record*, with each contact record storing different chunks of information in *fields* (e.g. first name, last name, email address). You can customize your contact database – and store additional information about your contacts – by adding, modifying, or deleting common fields. Common fields are fields like first name, last name, and email address that apply to all kinds of contacts.

Searching for contacts

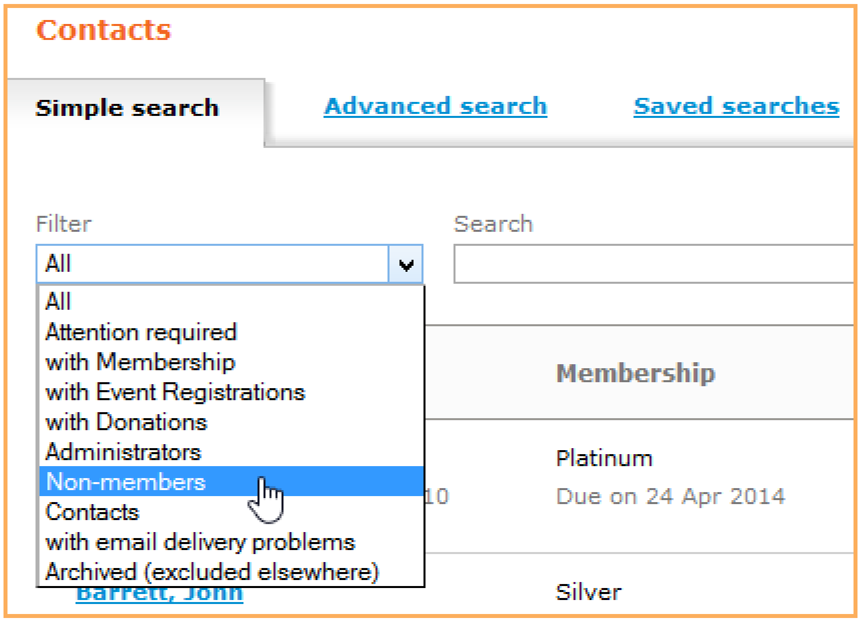
To view the list of your contacts, hover over the **Contacts** menu and select the **List** option.

Read more/less

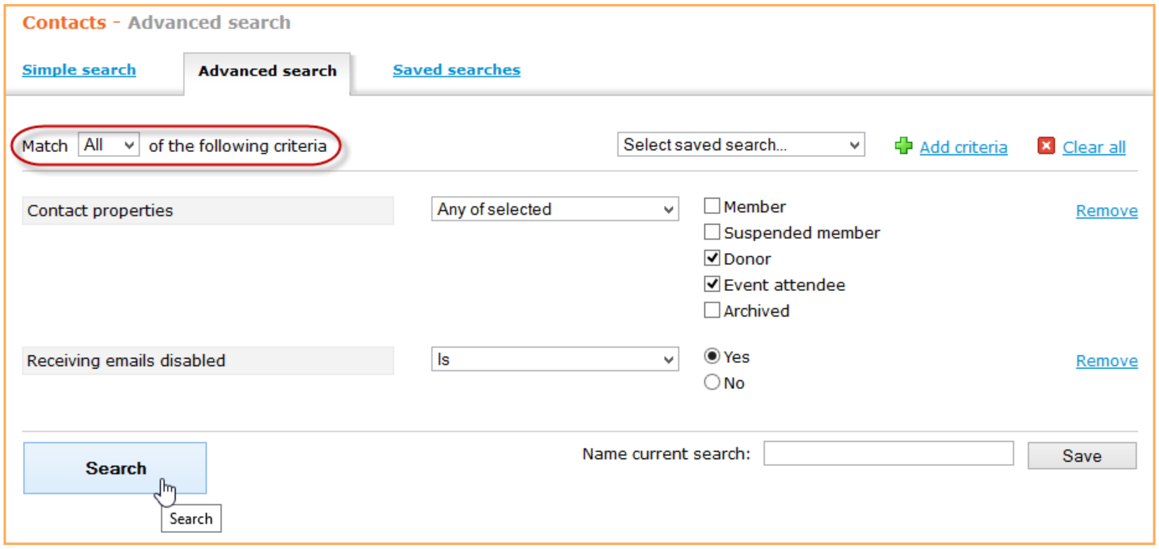


From the contact list, you can filter the list or search for a particular contact using a simple keyword search or an advanced search from the **Advanced search** tab.

From the **Simple search** tab, you can also select from a list of predefined filters to quickly display event attendees, donors, or other types of contacts.



Using the advanced search, you can combine multiple search criteria, and control whether any or all of the criteria needs to be met.



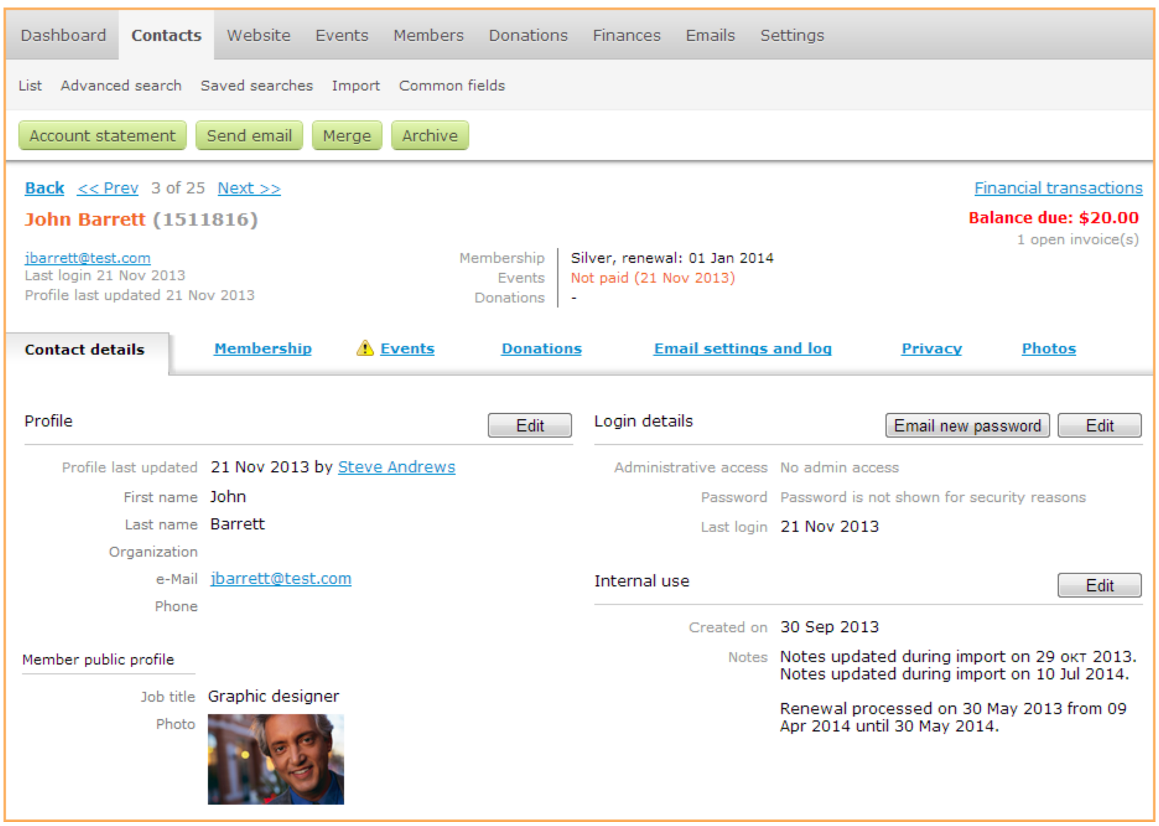
You can also find contacts within lists of members, event attendees, or donors.

Viewing contact details

To view the details for a particular contact, click the name of the contact within the contact list.

Read more/less

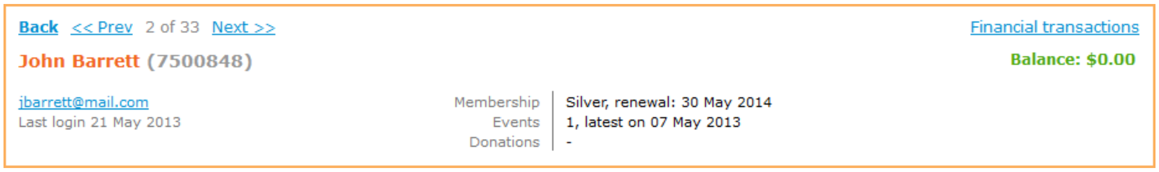
The contact record appears, divided into a number of tabs.



To jump from one tab to another, click the tab name.

Using the **Prev** and **Next** buttons, you can browse through all the contacts in the search results.

Across the top of the contact record is a brief overview of the contact's activities, including last login date, and the status of membership, events, and donations.



In the top right corner of the contact record, there is a **Financial transactions** link. Clicking this link will display all the financial transactions for this contact.

On the **Contact details** tab, the following information is displayed.

Section	Description
Common fields	Basic fields that appear on all records for this contact. Common fields include system fields – Member ID, First name, Last name, Organization, Email, and Phone – plus any custom common fields you have added (except those set to administrative access only).
Membership fields	Any custom membership fields you have added (except those set to administrative access only).
Login details	Description of the contact's administrative access privileges and the last login date.
Internal use	System generated notes plus any common or membership fields that have been set to administrative access only.

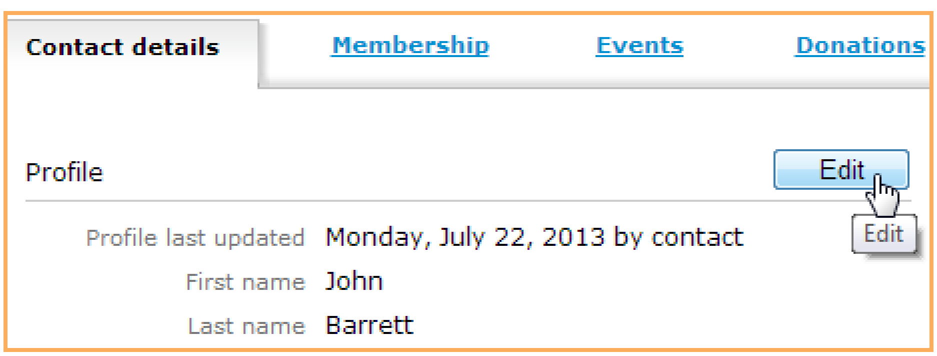
Modifying contact details

From the **Contact details** tab of a contact record, you can modify contact information, assign access privileges, set passwords, and enter notes.

Modifying common and membership field values

To modify common field values and membership field values for a contact, click the **Edit** button to the right of the **Common fields** section heading.

Read more/less



You can enter new values in the fields then click the **Save** button to save your changes.

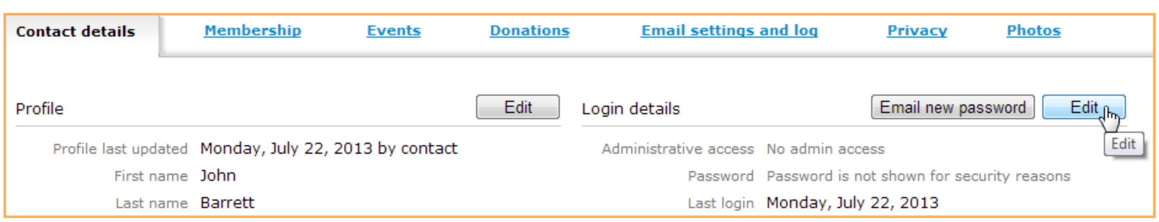
You can also enter a new password for the contact from this screen.

For instructions on adding, deleting, or renaming common and membership fields, see Customizing your member database.

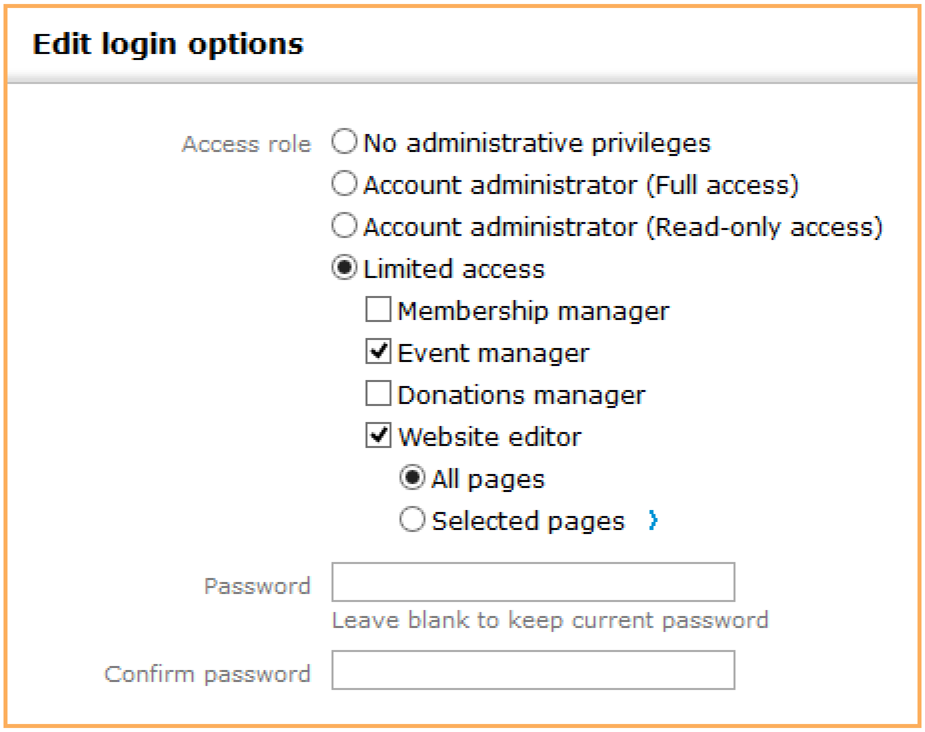
Setting administrative access privileges

To grant, remove, or change administrator access privileges for the contact, click the **Edit** button to the right of the **Login details** heading.

Read more/less



From the **Edit login options** screen, choose the access privileges to be granted to the contact.



You can choose from the following options:

Option	Description
No administrative privileges	Select this option to remove admin access for existing administrators.
Account administrator (Full access)	Grants full access to all administrative functions. Take care when granting this level of access since full admins can delete other admins and even the entire site.
Account administrator (Read-only access)	Allows viewing of nearly everything in the admin backend without being able to make any changes.
Limited access	Provides administrative access to selected Wild Apricot modules. Use this option if you have dedicated personnel in charge of events, memberships, editing webpages, or managing donations. With this option selected, you can limit access to one of the following roles: **Membership manager** – can create new contacts, modify all existing ones **Event manager** – can create and manage all events **Donations manager** – can manage all donations **Website editor** – can modify your website pages. With this option selected, you can provide access to all pages on your site or to selected pages. When you grant access to a page, you automatically grant access to all of its child or sub pages.

When you are finishing setting administrator privileges, click the **Save** button.

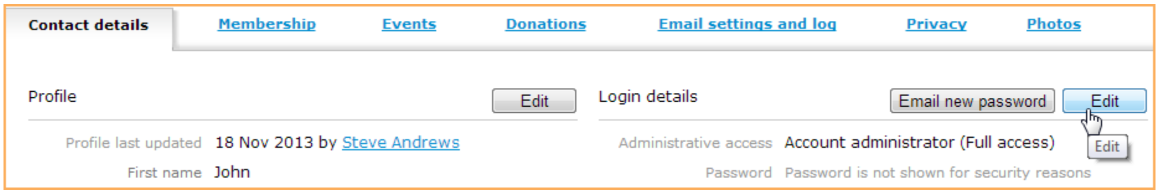
When a contact is granted administrator privileges, an email is sent to the contact with links to more information about managing Wild Apricot sites.

For more information, see Managing site administrators.

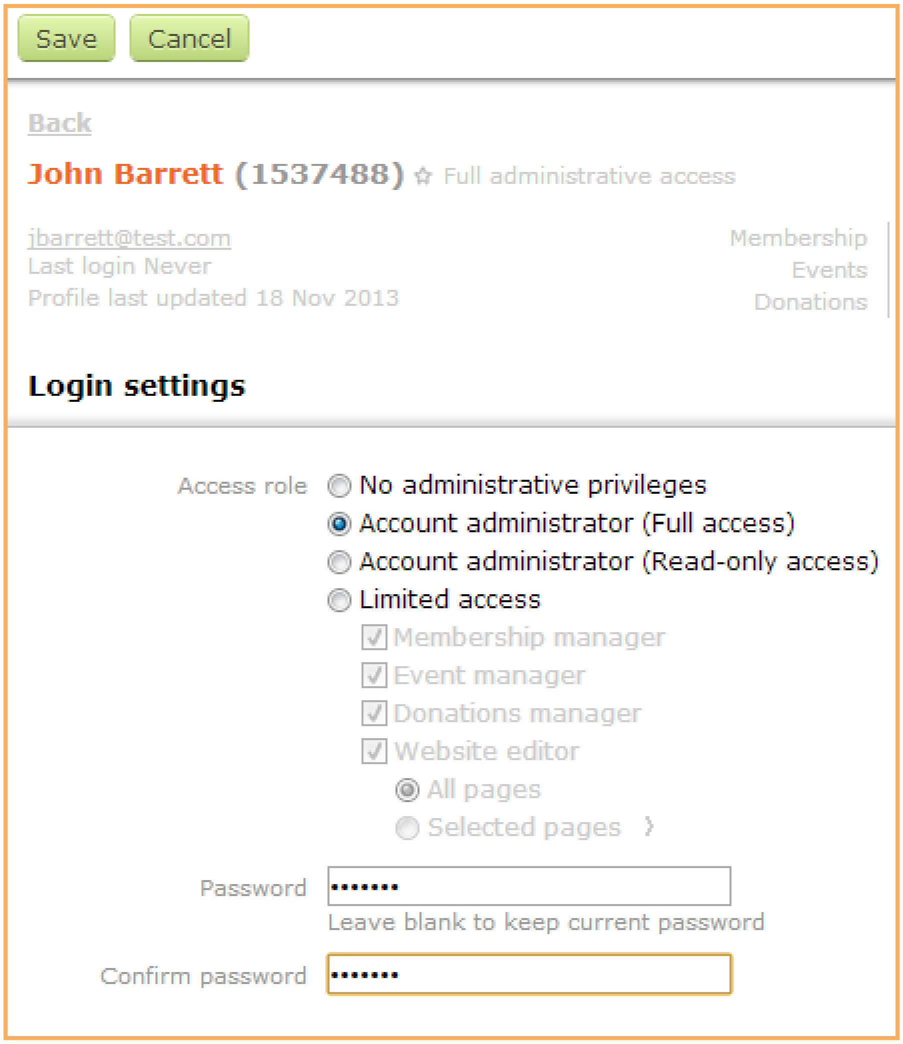
Changing the password

To change a contact's password from their contact record, go to the **Contact details** tab and click the **Edit** button to the right of **Login details**
.

Read more/less



On the screen that appears, enter the new password in the two password fields then click **Save**.



An email with the new password will **not** be automatically emailed to the contact.

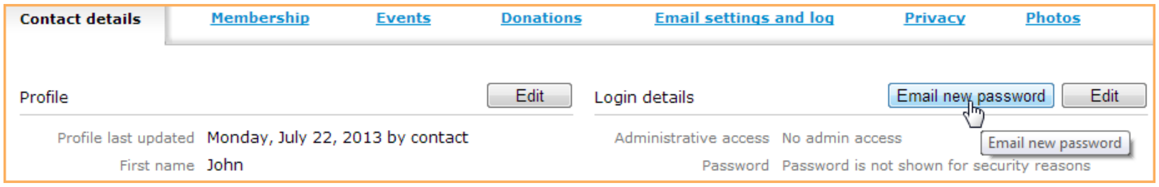
You can also change a contact's password through import. Contacts can change their own passwords from their profiles. For more information, see Setting and changing passwords.

Generating and emailing a new password

Instead of setting the password yourself, you can automatically generate and email a new password to the contact. This comes in handy when you add a contact manually.

Read more/less

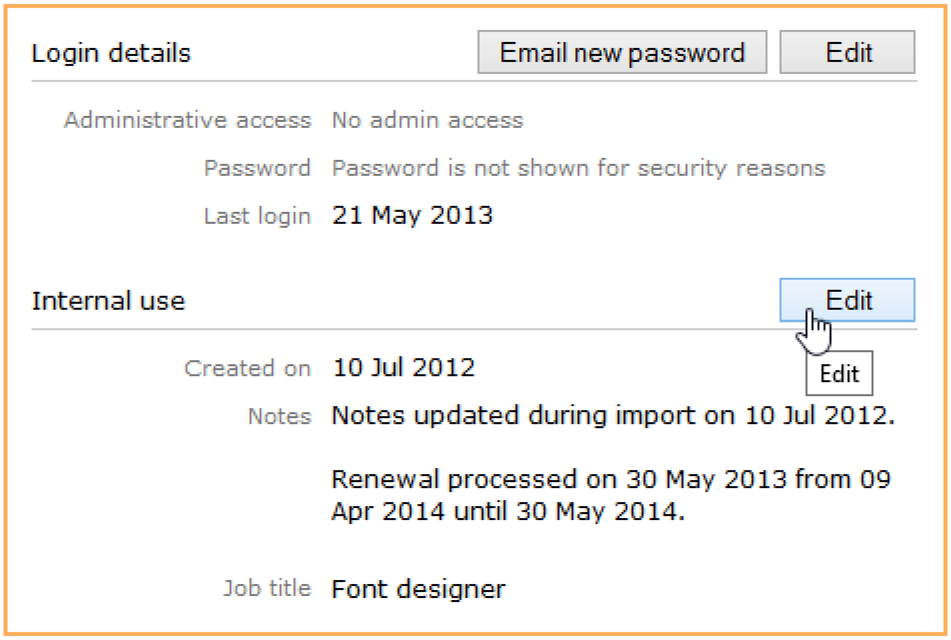
To generate a password and email it to a contact, clicking the **Email new password** button from the contact's **Contact details** tab.



Modifying system generated notes and internal use fields

To modify system generated notes and custom fields set to administrator-only access, click the **Edit** button to the right of the **Internal use** heading.

Read more/less



From the screen that appears, you modify the values in the notes field and the internal use field(s), then click **Save**.

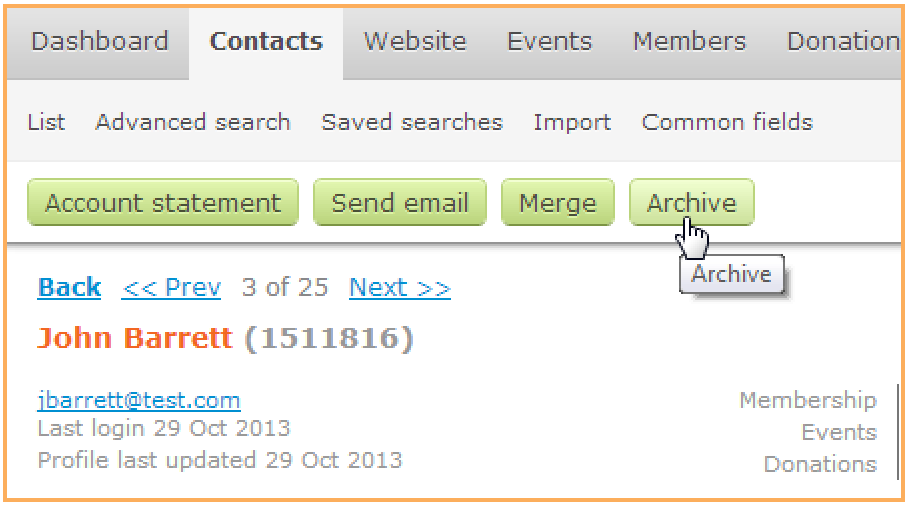
Only administrators can view or update system notes and internal use fields.

Archiving contact records

Archived records do not count against your database limit, and are automatically excluded from email blasts, including automatic event notices. Archiving a record is the first step in deleting a record.

Read more/less

To archive a contact record, display the contact record then click the **Archive** button.



With the record archived, you can now delete it by clicking the **Delete** button.

For more information, see Deleting and archiving member and contact records.

Merging contact records

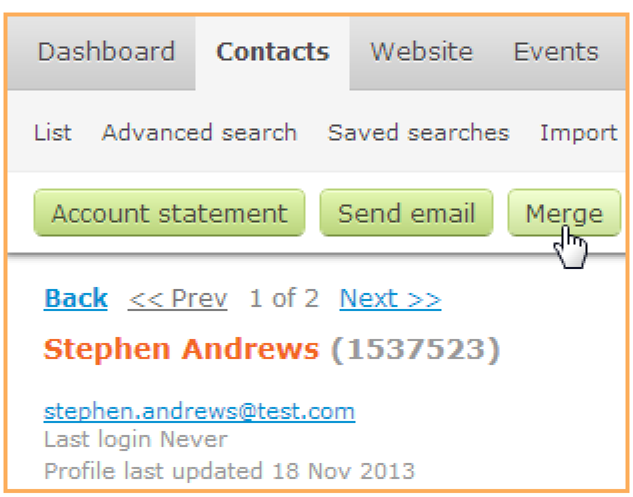
You can merge data from two contact records, so that one record with the combined data remains active and the other record is archived.

Read more/less

As part of the merging process, you select the contact record you want to remain active and the other record to be merged and archived.

You cannot undo the merging of contact records.

To merge two records, start by going to the **Contacts** tab and clicking on one of the two records – it doesn't matter which. With the one record open, click the **Merge** button towards the top.



From the window that appears, select the other contact to be merged then click **Next** then choose which contact record you want to keep active.

For more information, see Merging records.

Toolbar options

The following options appear in the toolbar at the top of the contact details screen.

- **Account statement** - generates an account statement report for the contact. See Financial reports.
- **Send email** - send an email to this contact.
- **Merge** - merge this record with another one. See Merging records.
- **Archive** - archives the record (the first step in deleting a record). See Archived vs. active records.

Contact tabs

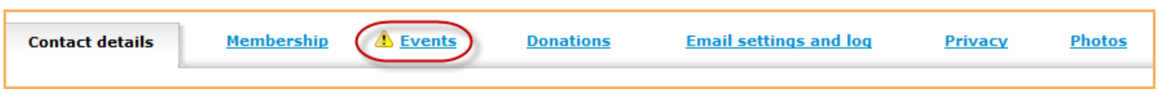
In addition to the **Contact Details** tab, there are other tabs that allow you to view or update additional information and settings associated with the contact.

Read more/less

These tabs include:

- **Membership** – View/edit member details like membership level, member status, renewal date etc. See Viewing and editing membership details.
- **Events** – View/edit events the contact has registered for, or register for new events. See View event registrations.
- **Donations** – View/edit/record new donations for this contact. See Donation records.
- **Email settings and log** – Turn emails on/off, view log of emails sent to the contact. See Contact email settings and log.
- **Privacy** – Control who can view information about this contact. See Member privacy settings.
- **Photos** – Allow or prevent member from adding photo albums to their profile. See Member photo albums.

Any tabs that have a pending action (awaiting payment on a donation, or approval on a membership application) have a yellow warning icon ( ) beside their name.



Once you jump to that that page, the information that requires your attention will be indicated with the same icon.

On this page:

- Searching for contacts
- Viewing contact details
- Modifying contact details
    - Modifying common and membership field values
    - Setting administrative access privileges
    - Changing the password
    - Generating and emailing a new password
    - Modifying system generated notes and internal use fields
- Archiving contact records
- Merging contact records
- Toolbar options
- Contact tabs

Expand all sections

See also:

- Searching and filtering contact and member records
- Member - edit profile
- Customizing your member database

- [Managing site administrators]

Viewing and editing membership details

Viewing and editing membership details

Members are contacts , but they are a special kind of contact with special features and characteristics. What most distinguishes members from other contacts is that members are assigned to membership levels .

When someone becomes a member of your organization, a contact record is automatically created. From the member's contact record, administrators can view and edit membership details. Members can view and modify their own membership details from their profile page.

From the Members module, you can view a table summarizing your membership database, or a full list of members that you can filter and search.

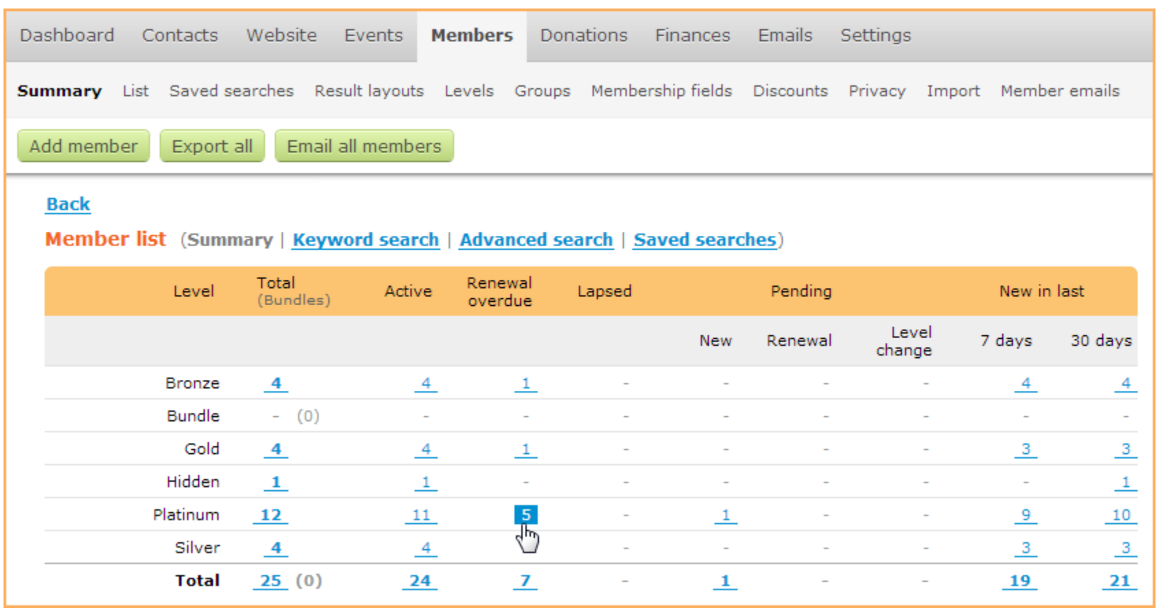
> ⓘ The member summary and member list does not include contacts who are not members or who have been archived, and does not include suspended members. You can view excluded contacts from the contact list or using an advanced search.

Displaying the member summary

To view the member summary, hover over the **Members** menu and select the **Summary** option.

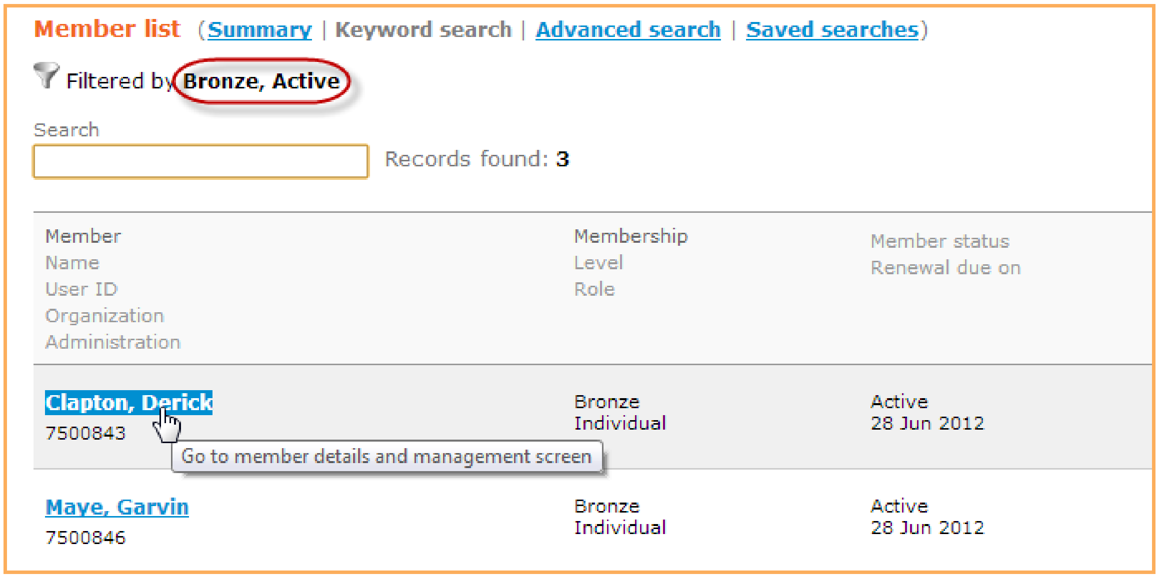
Read more/less

The member summary displays the number of members broken down by membership level and membership status.



Using the toolbar options, you can add a new member, export the entire member database, or send a mass email to all members in your database.

When you click on a number within the table, a list of members with that membership level and membership status will appear.



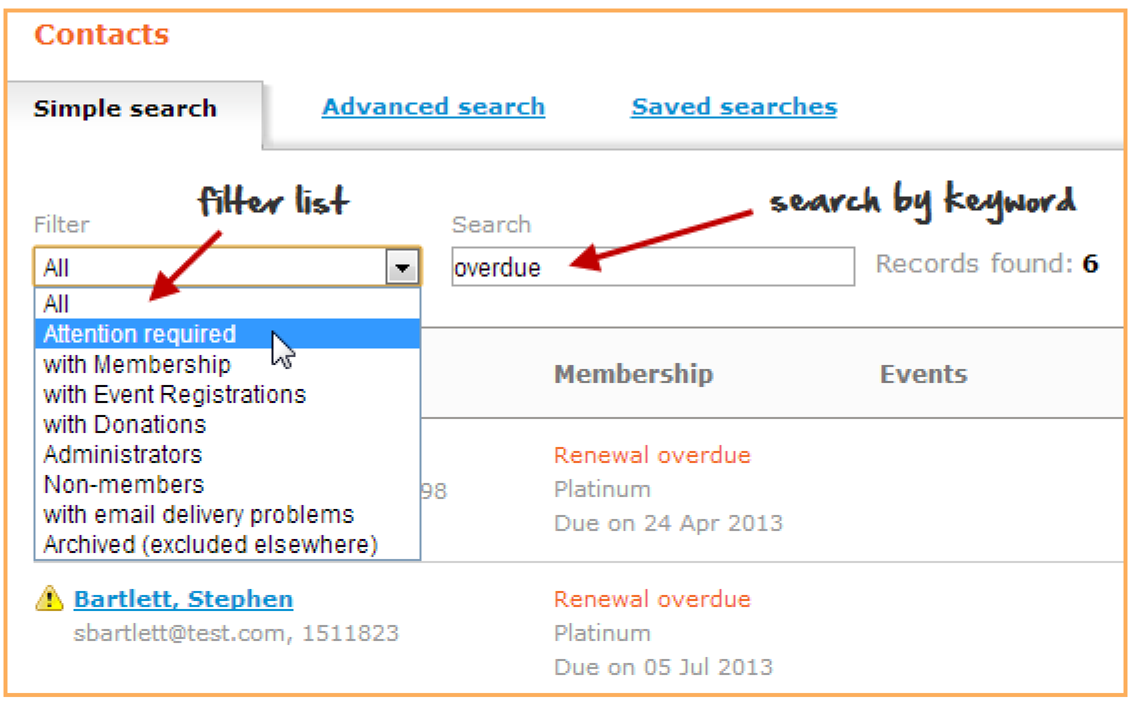
Within the list, you can click a member's name to view their membership details.

Displaying the member list

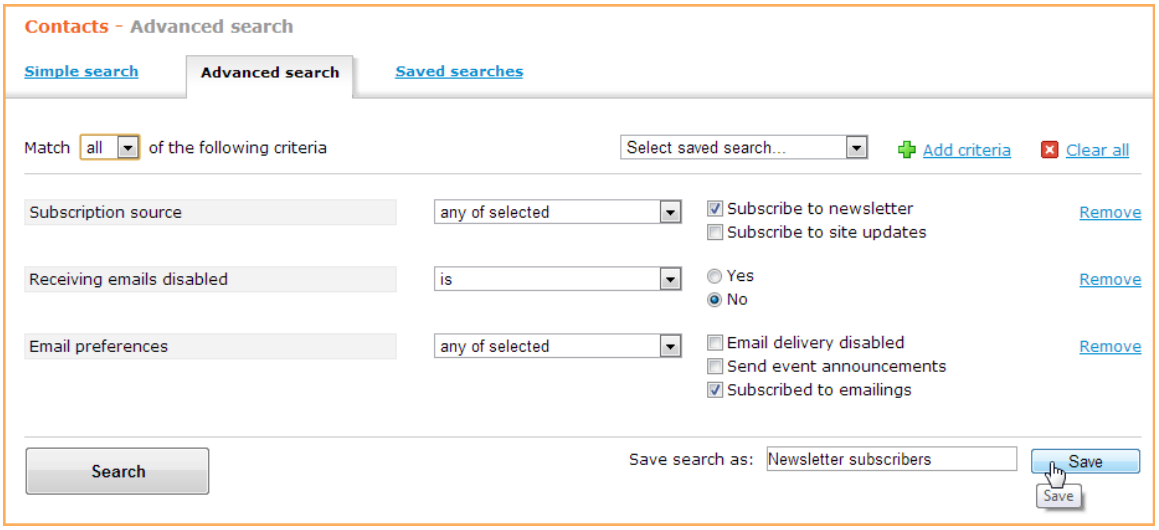
To display the full member list, hover over the **Members** menu and select the **List** option.

Read more/less

On the simple search page that appears, you can filter the list by entering a search keyword or by selecting from a list of predefined filters.



To perform a more advanced search, using multiple search criteria, click the **Advanced search** tab. From the advanced search page, you can assemble your search criteria and save your search for future use.



Using the toolbar options, you can add a new member, export the current member list, send a mass email to the current member list, or archive the current member list.

For example, you could search for:

- members who last logged in more than 3 months ago
- members at a particular level with a renewal due in the next week
- members from a particular state with email delivery disabled

Once you have your search results, you can view individual member details by clicking on members within the list.

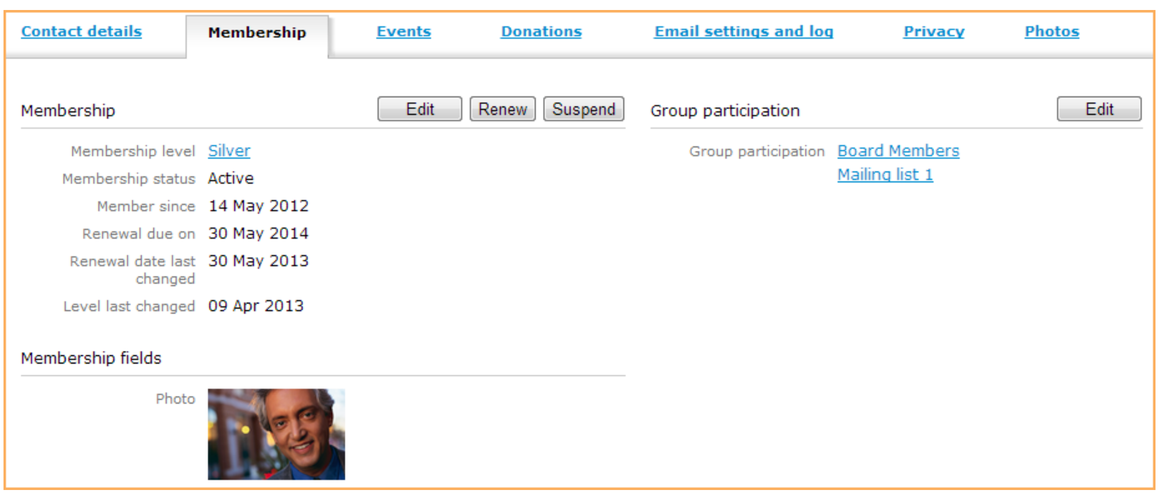
Printing the member list or member summary

To print the member list or member summary, display the list or summary then click the **Print** icon in the upper right corner of the screen, beside the Wild Apricot logo.

Viewing membership details

Within a member's contact record, membership details appear on the **Membership** tab.

Read more/less



On this tab, the following information is displayed for each member:

- Membership level
- Membership status
- Member since date
- Date renewal due on
- Date that renewal date was last changed
- Date that membership level was last changed

- Membership field values
- Member groups participation

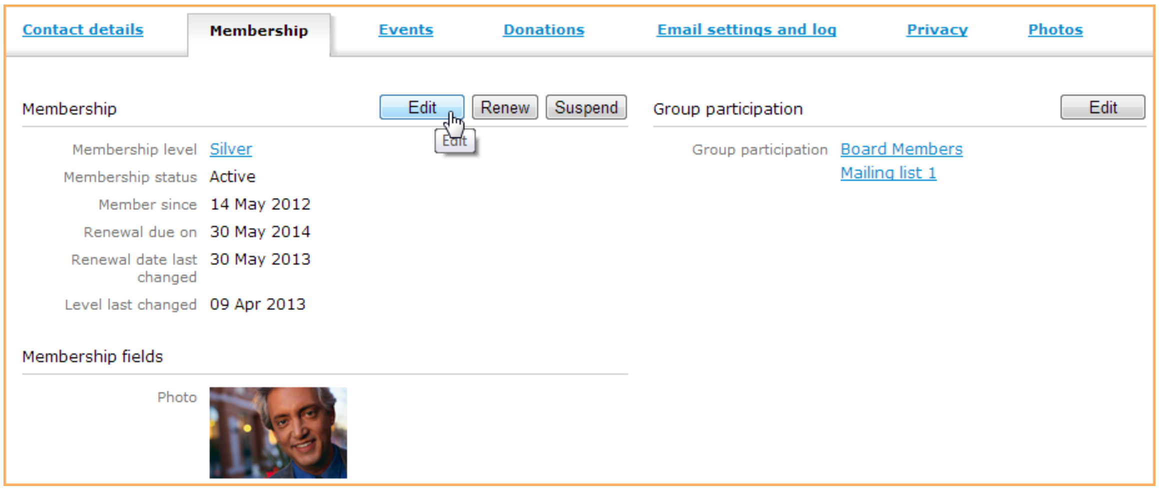
Membership fields are custom fields that you have added to your Wild Apricot database. Membership fields also appear on your membership application form, and can be restricted to specific membership levels.

Modifying membership details

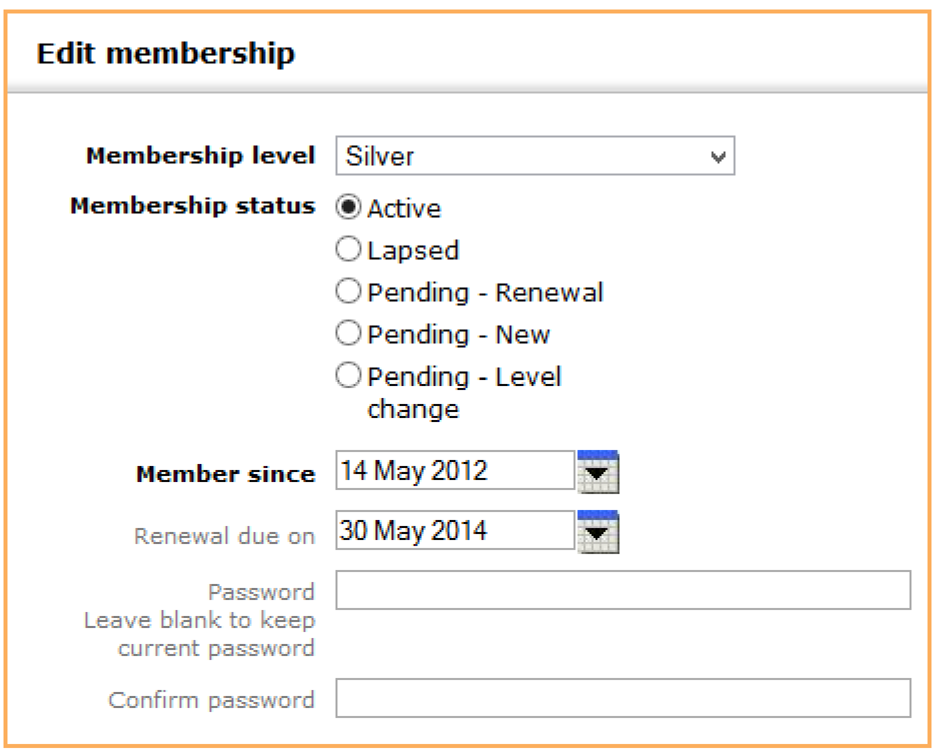
From the **Membership** tab of a member's contact record, you can modify various membership details.

Read more/less

To modify membership details, click the **Edit** button within the **Membership** section of the **Membership** tab.

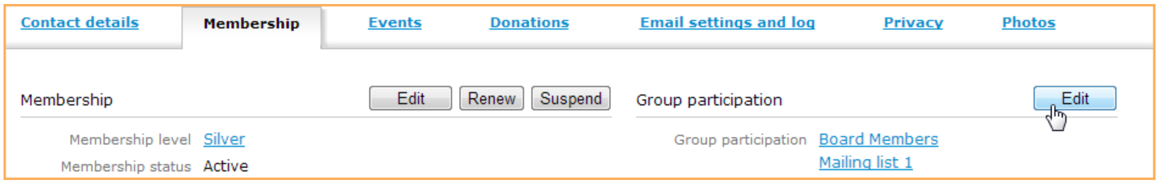


From the **Edit membership** screen, you can update the level, status, renewal date, password, membership fields, and member group participation.



Only bundle administrators can change the status of a bundle membership.

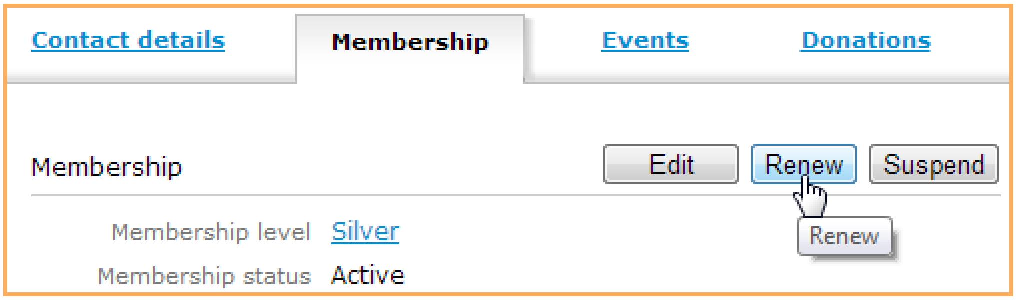
To modify only member group participation, click the **Edit** button within the **Group participation** section.



Renewing a membership

To manually renew a member's membership, click the **Renew** button.

Read more/less



On the screen that appears, you can specify the next renewal date and click **Save** to complete the renewal. Unless the membership level is free, you will be asked to choose one of the following options:

- **Activate without invoice** – activates the membership renewal without generating an invoice or adding to the member's outstanding balance. Choose this option if this member has already paid and/or you do not want to track this transaction in Wild Apricot.
- **Generate invoice** – generates an invoice for the membership renewal. The member can then pay the invoice online through their profile or by using an offline payment method (e.g. cash, check).
- **Cancel** – cancels the membership renewal.

If the membership level is free, you will be asked to confirm the renewal.

Members can also renew their membership themselves from their profile page.

Suspending a membership

You may wish to suspend someone's membership because of an overdue renewal payment or some other reason. You can also suspend a member to convert the member into a contact.

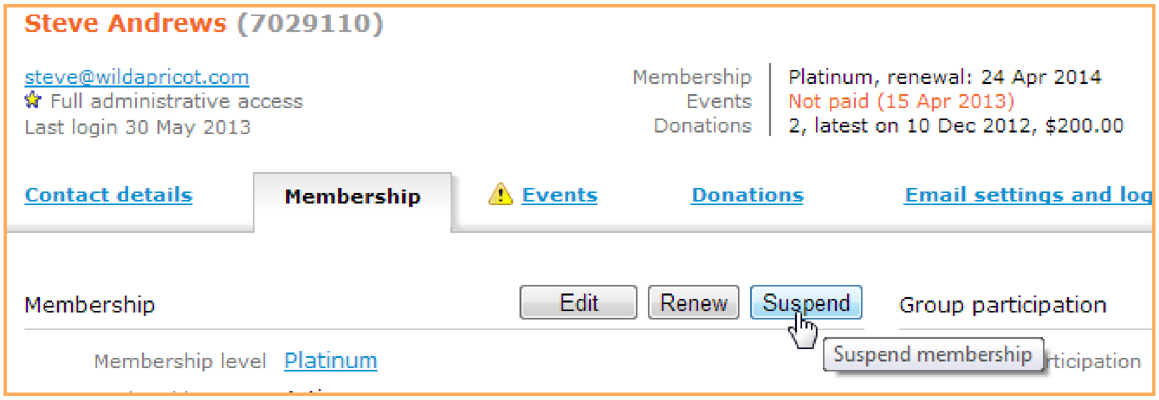
Read more/less

Suspending a membership will:

- Remove the membership so they become a non-member contact
- Hide them from any member directory
- Keep an archive of their membership level and status
- Keep all their contact information as it was before (e.g. you can still send emails to this person)

For more information, see How membership status affects available functionality.

To suspend a member, click the **Suspend** button within the Membership tab.

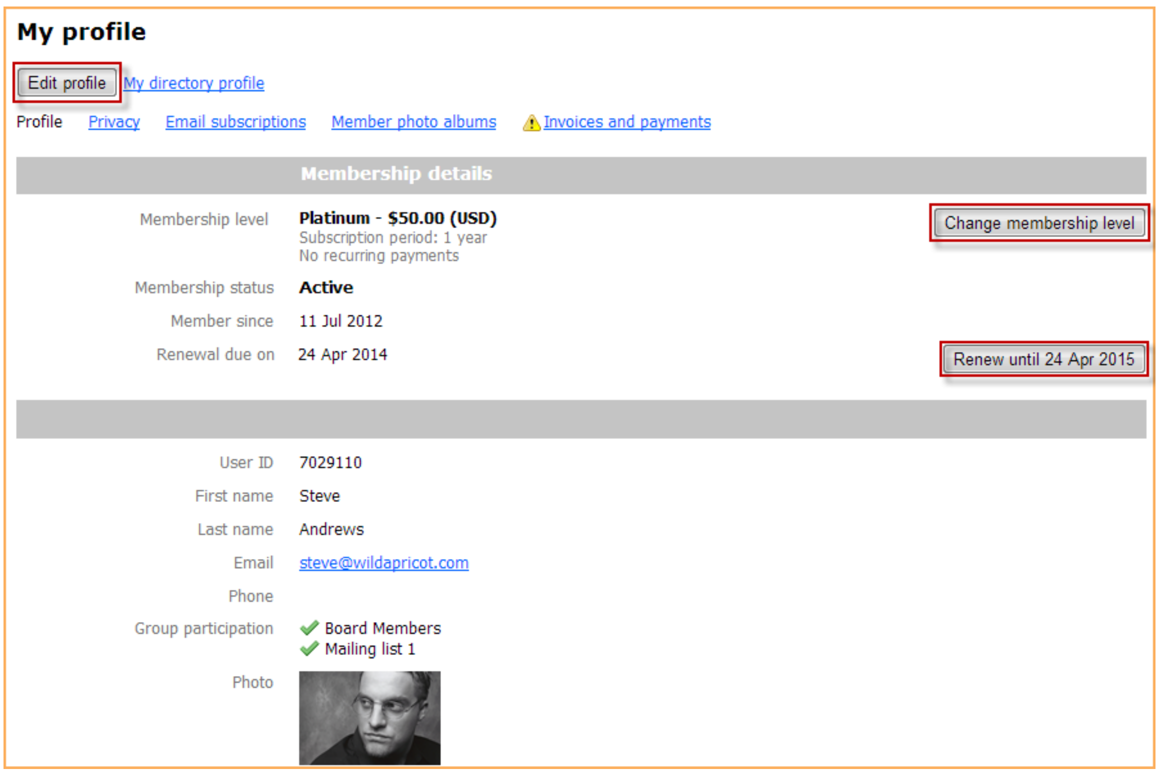


If, at a later date, you wish to reinstate the contact as a member, you can click on the **Resume** button within their membership tab. This will reactivate them to their previous membership level with all their details intact.

Membership self-service

From their profile page, members can change their membership level, renew their membership, change membership field values, and manage member group participation.

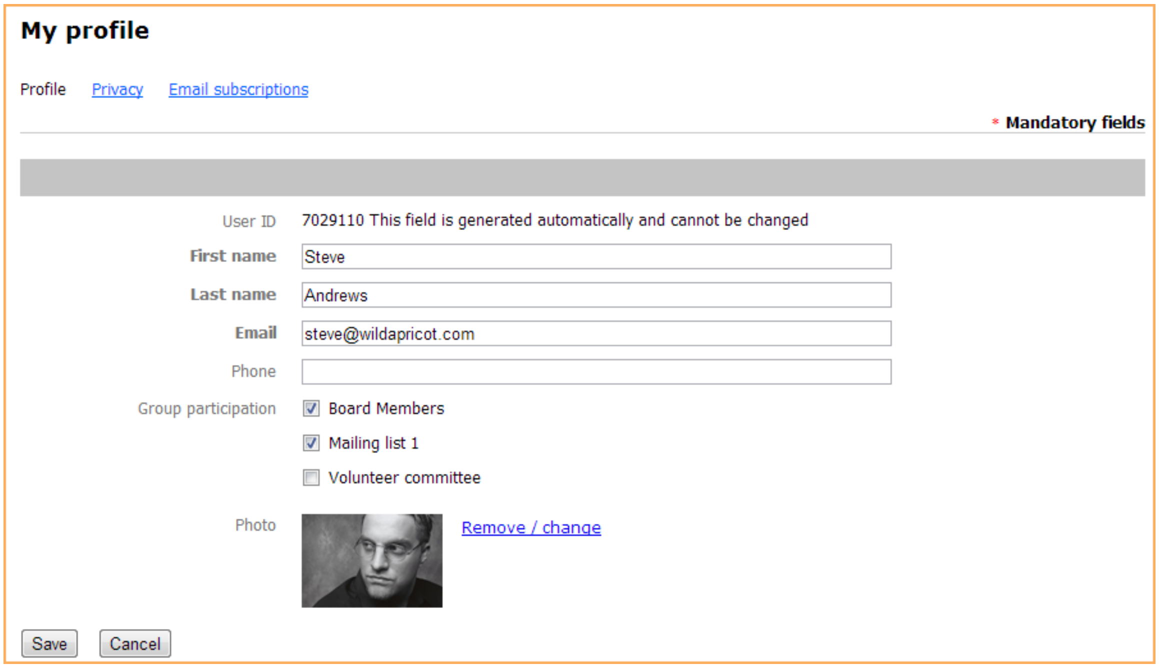
Read more/less



To change their membership level, members click the **Change membership level** button.

To renew their membership level, members click the **Renew** button.

To modify membership field values or manage member group participation, members click the **Edit profile** button.



On this page:

- Displaying the member summary
- Displaying the member list
- Printing the member list or member summary
- Viewing membership details
- Modifying membership details
- Renewing a membership
- Suspending a membership
- Membership self-service

Expand all sections

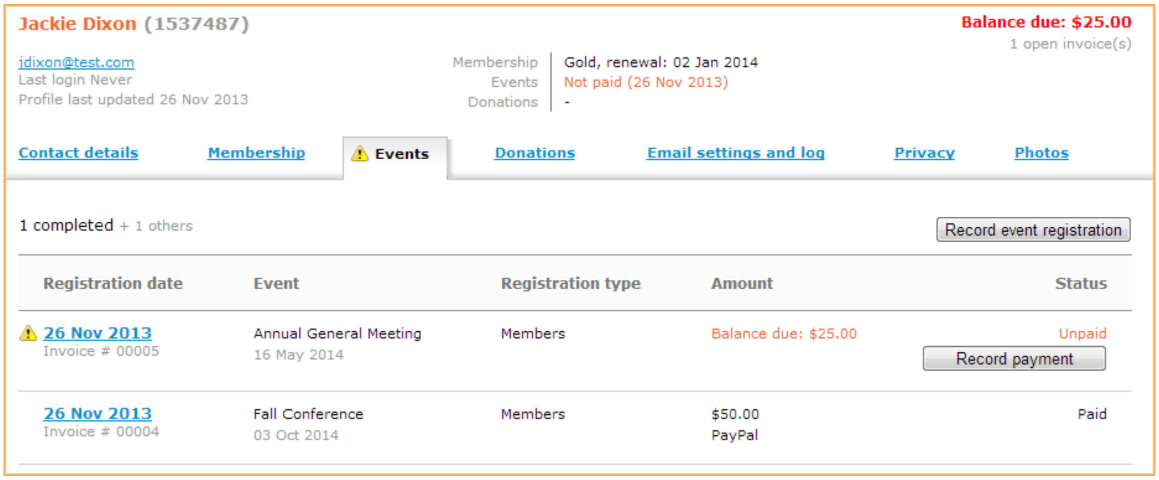
See also:

- Membership levels
- Setting and changing passwords
- Member groups
- Member and contact - edit profile
- Member - renew or change level
- Suspending a membership
- Viewing and editing contact details

Event registration records

Event registration records

To view all the event registrations for a particular contact, go to their contact record and click the **Events** tab.



For each event, the following registration information is displayed:

Column	Description
Registration date	When the registration was submitted.
Event	The name and date of the event.
Registration type	Type of registration for this event.
Amount	Total fee (including extra costs they have selected as well as the amount of guest registrations), how they chose to pay, and the balance due.
Status	Status of the registration invoice. If no event invoice exists for the contact, you have the option of generating a new invoice, or confirming the registration without creating a new invoice (and no fee will be charged to the registrant). You also have the option to record payment on all outstanding invoices. Once paid in full, the status is shown as *Paid*.

Click on any of the listed events to view the contact's event registration details.

You can also manually register the contact for more events by clicking the **Record event registration** button.

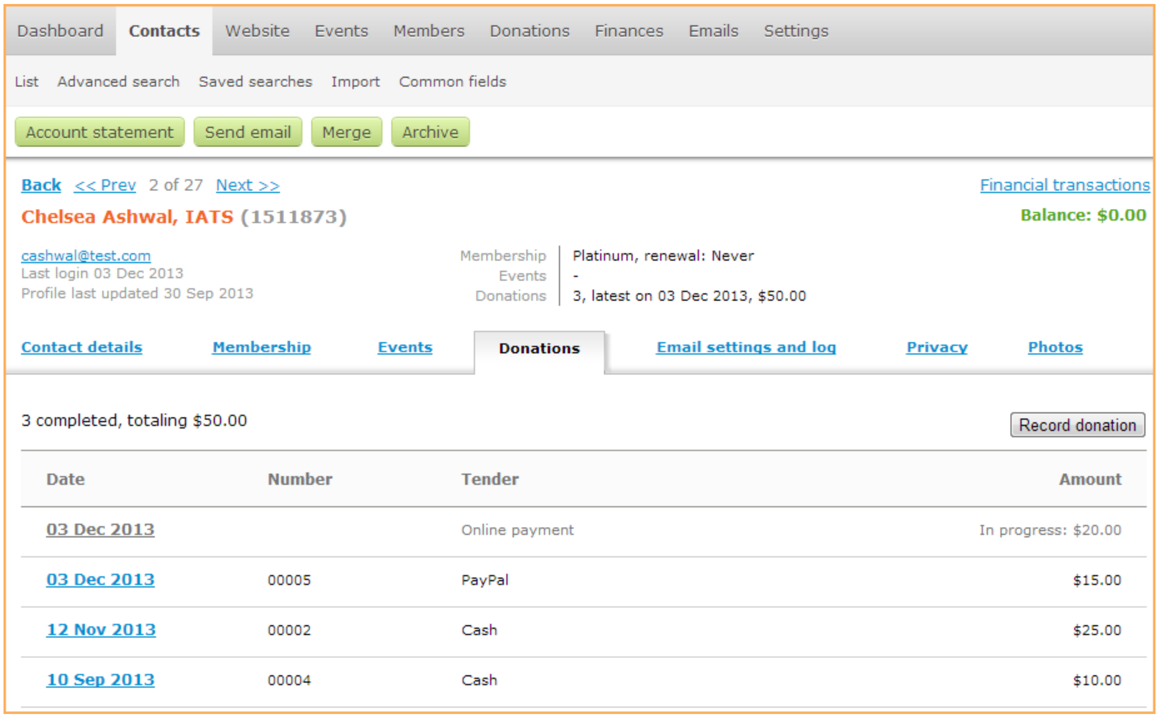
See also:

- Setting up events
- Viewing event registration information

Donation records

Donation records

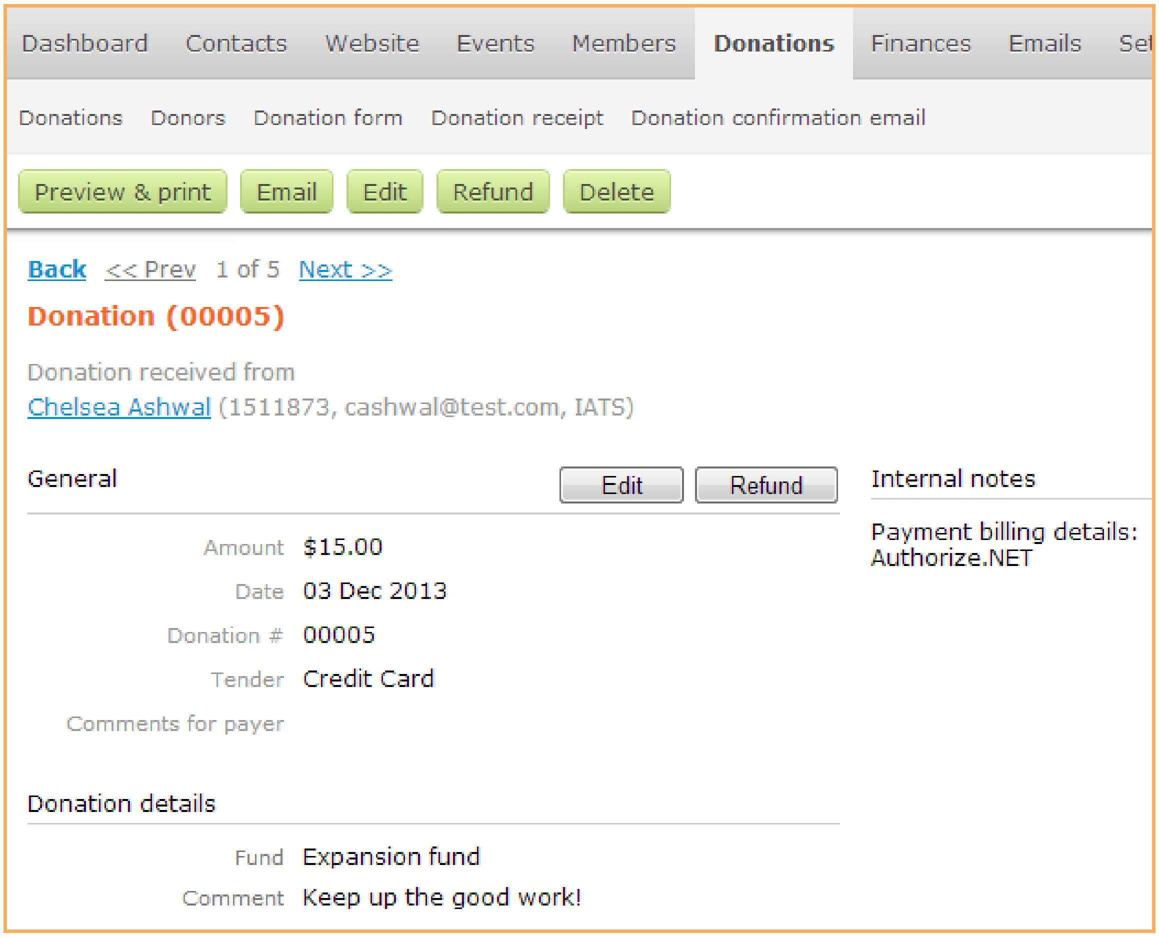
Within a contact's record, you can view a history of all donations made by the client. To view a list of all donations made by a particular contact, go to their contact record and click the **Donations** tab.



For each donation, the following information is displayed:

Column	Description
Date	Date of the donation, plus payment details for online payments or any internal notes recorded by the administrator.
Number	Donation receipt number.
Tender	How the donation payment was made. See Payment tenders.
Amount	The amount of the donation.

To view the details of a particular donation, click it within the list.



Within the donation details screen, the following options are available:

Option	Description
Preview & print	Print the donation receipt.
Email	Email the donation receipt. A donation receipt is not send automatically when you manually record a donation. You can customize the email message before sending it.
Edit	Modify the donation details. See Managing donations for more information on modifying donations.
Refund	Refund the donation. See Managing donations for more information on refunding donations.
Delete	Delete the donation. See Managing donations for more information on deleting donations.

To record another donation for this contact, click the **Record donation** button.

For information on displaying donations for all contacts, see Managing donations.

Contact email settings and log

Contact email settings and log

From the **Contact email settings and log** tab on a contact record, you can view and/or modify the following:

Email preferences

Within the **Email preferences** section of the **Email settings and log** tab on a contact record, an administrator can change whether a contact receives emails, which types of email the contact is subscribed to, and change the frequency of forum update notifications. The administrator can also disable the delivery of all emails, including automatic system emails, to the contact.

Read more/less

To modify a contact's email preferences, click the **Edit** button beside **Email preferences**. The following options are available:

<table>
<tr><th>Option</th><th>Description</th></tr>
<tr><td>Send emails per settings below</td><td>Click to choose which types of email you want enabled or disabled, using the options below.</td></tr>
<tr><td>Disable ALL emails</td><td>Click to disable all emails, including automatic system emails such as membership renewal reminders, event registration confirmations, invoices, and payment receipts.</td></tr>
<tr><td>Opt-in status</td><td>Indicates whether the contact has consented to receive emails from your organization. The following options are available:
<table>
<tr><th>Option</th><th>Description</th></tr>
<tr><td>Opted in</td><td>The contact has given their consent to receive emails from your organization. The contact can subscribe to specific types of messages, like event announcements and email blasts.</td></tr>
<tr><td>Opted out</td><td>The contact has expressly withheld their consent to receive emails from your organization. They will still receive confirmation emails in response to specific actions on their part, such as membership renewal notices or event registration confirmations, but they will not receive event announcements and other email blasts.</td></tr>
<tr><td>Undefined</td><td>The contact has not yet chosen whether to consent to receive emails from your organization.</td></tr>
</table></td></tr>
<tr><td>Workflow emails</td><td>Workflow emails – automatic system emails such as renewal reminders, event registration confirmations, invoices, or payment receipts – cannot be disabled for a contact without disabling all emails, using the option above.</td></tr>
<tr><td>Event announcements</td><td>Check to allow this contact to receive event announcements and reminders. This option is only available if the Send emails per settings below option is selected, and the contact has not opted out of receiving messages from your organization.</td></tr>
<tr><td>Email blasts</td><td>Check to allow this contact to receive manual email blasts. This option is only available if the Send emails per settings below o ption is selected, and the contact has not opted out of receiving messages from your organization.</td></tr>
</table>

Forum subscriptions	Click the check boxes to enable or disable forum update emails, and change the frequency of the emails by selecting an option from the drop-down list. Forum subscription options only appear if the contact has subscribed to forum update emails from a forum page.

When you are finished updating the contact's email preferences, click **Save**.

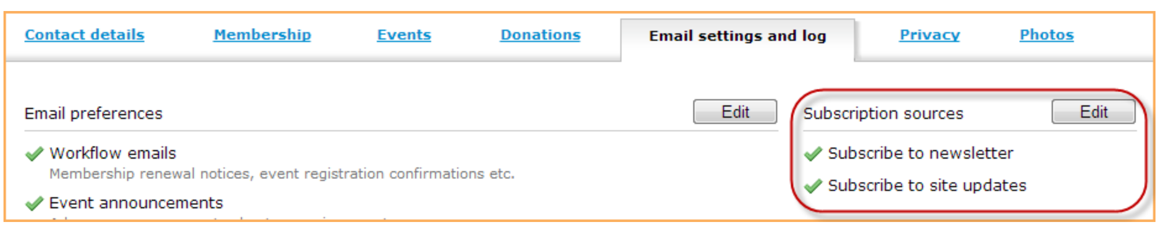
Subscription sources

Visitors to your site can sign up to receive newsletters, updates, or other mass emails by filling out an email subscription form.

Read more/less

Signing up for email subscriptions is separate and distinct from the process of subscribing or unsubscribing to certain types of emails.

To view which email subscriptions a contact is currently signed up for, look under **Subscription sources** on the **Email settings and log** tab of the contact record.

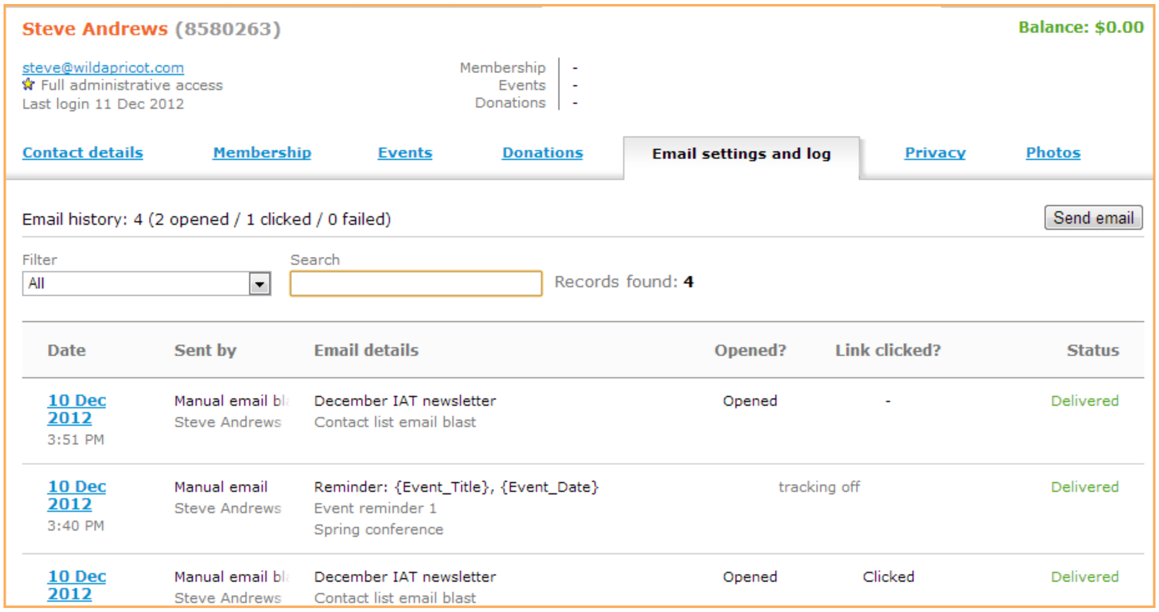


To change the subscription sources for a contact, click the **Edit** button. On the screen that appears, check the sources you want to subscribe the contact to.

Email history

To view a contact's complete email history – a log of all emails sent to the contact from your site – see the **Email history** section at the bottom of the **Email settings and log** tab.

Read more/less

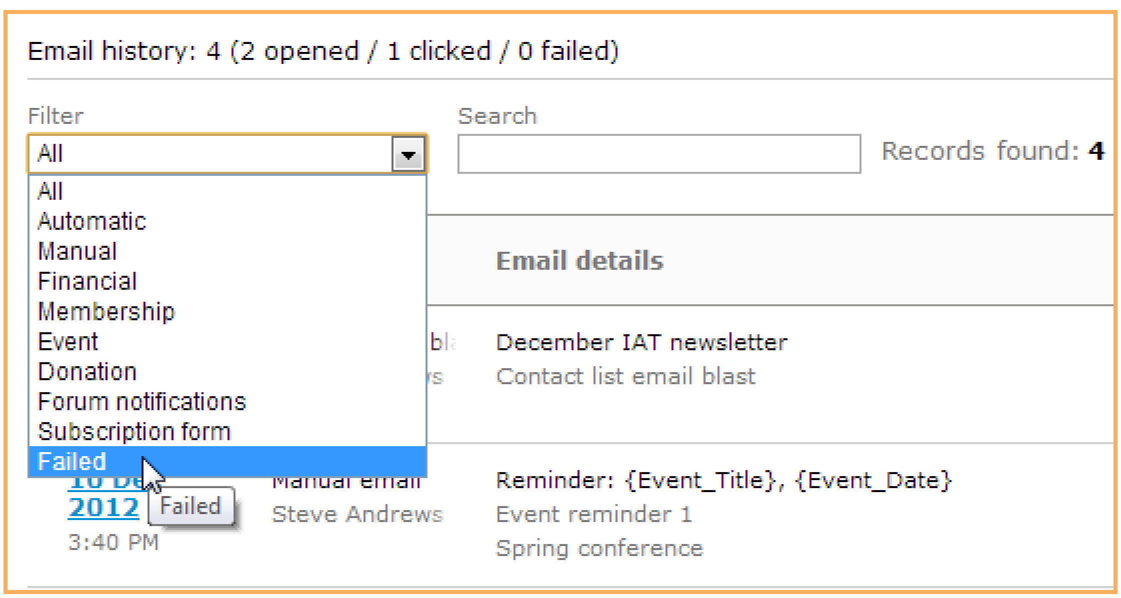


ⓘ This section will only appear if the contact has been sent emails from your Wild Apricot site.

For each message, the email history will display the date of the message, who the message was sent by (and whether it was a manual or automatic email), and the details of the message, including its subject and its source.

The status of each email – whether it was delivered or failed to be delivered – appears under the **Delivery** column. If email tracking was enabled for a particular message, the email history will indicate whether each recipient opened the email and which links were clicked.

To filter the email list to display only certain kinds of messages – automatic, manual, failed, etc. – click the **Filter** drop-down and select an option. To perform a keyword search, enter a search string in the **Search** field.



On this page:

- Email preferences
- Subscription sources
- Email history

Expand all sections

See also:

- Email subscription form
- Email log
- Tracking emails
- Managing undeliverable emails
- Unsubscribing to email lists

Member privacy settings

Member privacy settings

Administrators can control what membership information appears by default to the public and other members on member directories, forum posts, and blog entries, and whether member photo albums are visible to other members and non-members. Individual members can override the default privacy settings and choose for themselves what information appears to the public and other members. If you don't want members to be able to override the privacy settings you have chosen, you can lock the privacy settings for individual fields.

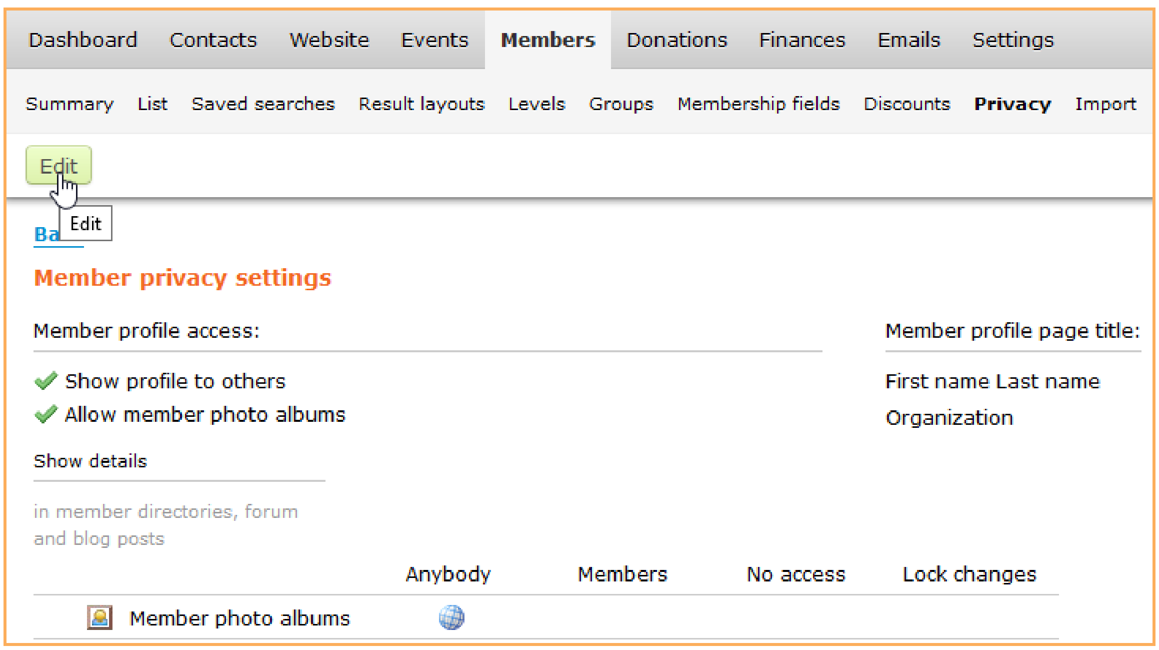
Setting privacy defaults (and applying changes to all members)

You can set the privacy defaults for future members, and optionally, apply the changes to existing members.

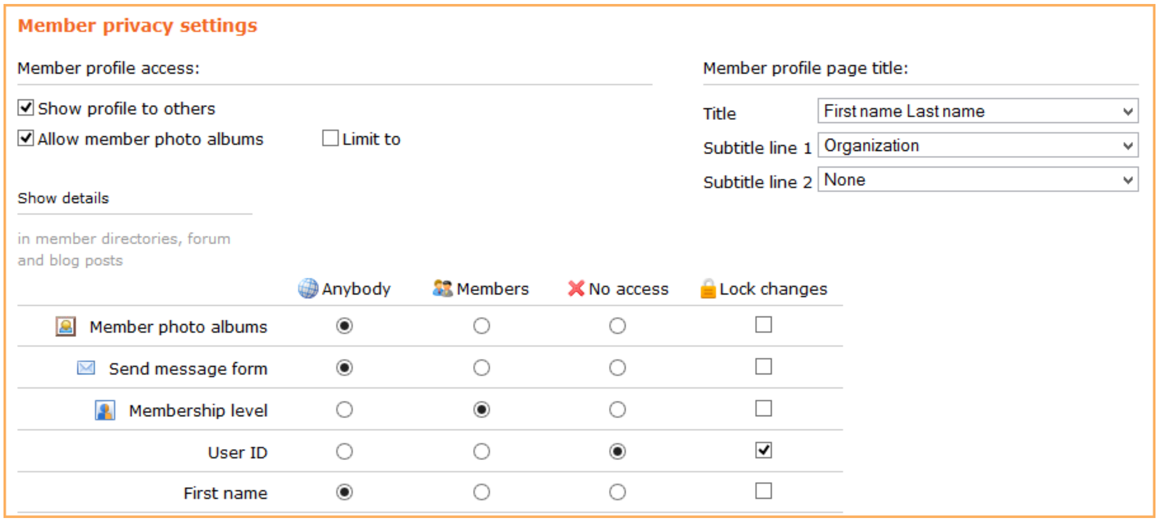
Read more/less

To set the privacy defaults for members, follow these steps:

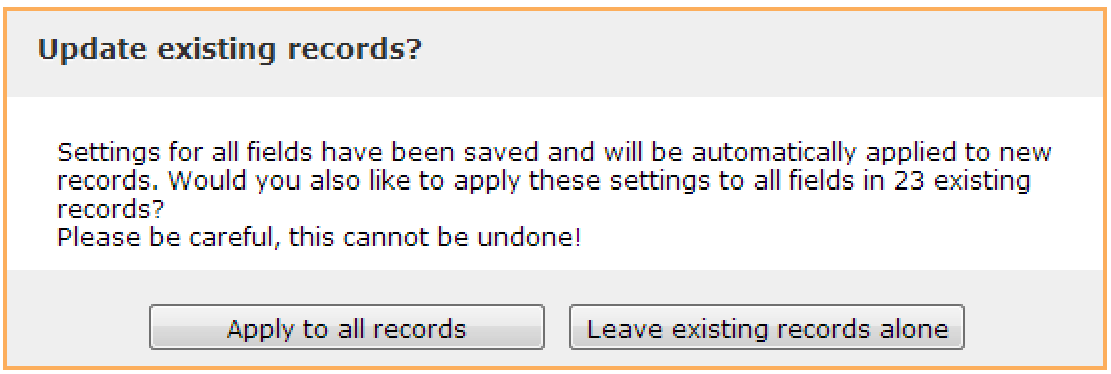
1. Hover over the **Members** menu and select the **Privacy** option.
2. On the screen that appears, click the **Edit** button to enter edit mode.



3. In the **Member profile access** section, you can control access to member profiles. If you uncheck the **Show profile to others** option, then members will not be listed in the member directory, and visitors will not be able to jump to a member's profile by clicking their name within the directory. If you uncheck the **Allow member photo albums** option, then members will not be able to create member photo albums. To allow member photo albums but limit the number of albums that members can create, check the **Limit to** checkbox and enter the maximum number of albums you want to allow.
4. In the **Fields to use as page title** section, you can control how members are identified within the title of their member profile.
5. In the **Show details** section, choose whether member photo albums, and information stored in individual contact fields and membership fields, will appear to anybody, to members only, or to no one other than administrators (and the member him or herself).



6. If you don't want individual members to be able to override your setting for a particular field, click the **Lock changes** checkbox for that field. Members will be unable to change the privacy setting for that field within the **Privacy** tab of their member profile.
7. To add or remove membership fields, click the **Add or change fields in database** link at the bottom.
8. When you are finished adjusting the privacy settings, click the **Save** button.
9. You will be asked whether you want to apply these changes to existing records as well as new records.



If you only want to apply these changes to new records, click the **Leave existing records alone** button. If you want to apply these changes to all existing records as well, click the **Apply to all records** button.
10. If you choose to apply the changes to all existing records, you will be asked to confirm the request by entering the word **REAPPL Y** in the field provided. After entering the word, click the **OK** button.

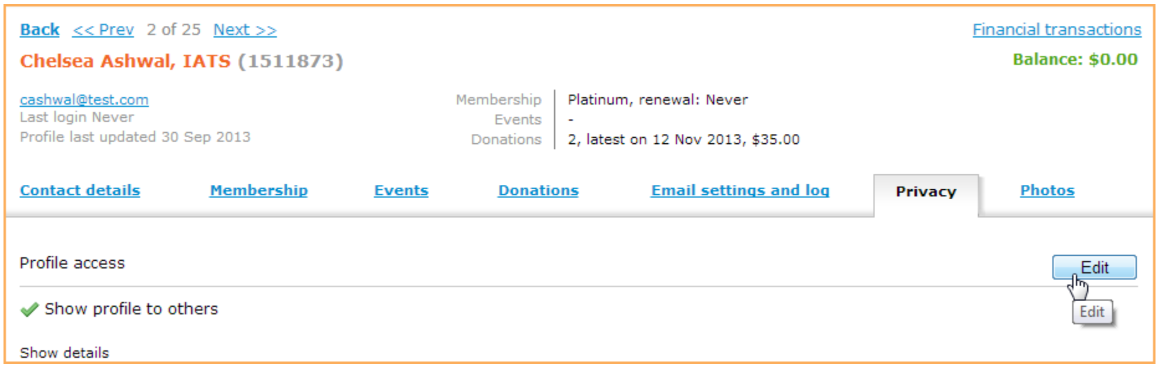
Changing privacy settings for individual members

You can change the privacy settings for individual members without affecting the settings for other members.

Read more/less

To change the privacy settings for a particular member, follow these steps:

1. Go to the **Contacts** module and display the contact's record.
2. Click the **Privacy** tab.
3. Click the **Edit** button to enter edit mode.



4. In the **Profile access** section, you can control access to this member's profile. If you uncheck the **Show profile to others** option , then member will not be listed in the member directory, and visitors will not be able to jump to the member's profile by clicking their name within the directory..
5. In the **Show details** section, choose whether the member's photo albums, and information stored in contact fields and membership fields for this member, will appear to anybody, to members only, or to no one other than administrators (and the member him or herself). You can also control whether member photo albums will be visible to members and other visitors to the site.
6. When you are finished adjusting the member's privacy settings, click the **Save** button.

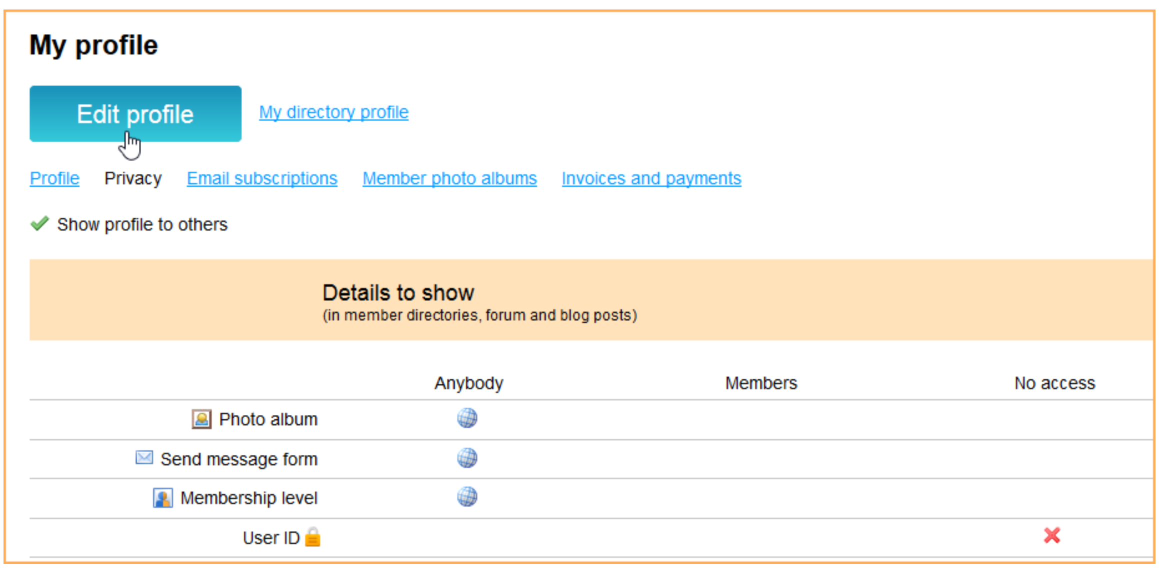
Changing privacy settings by members

From their member profile, members can change their privacy settings.

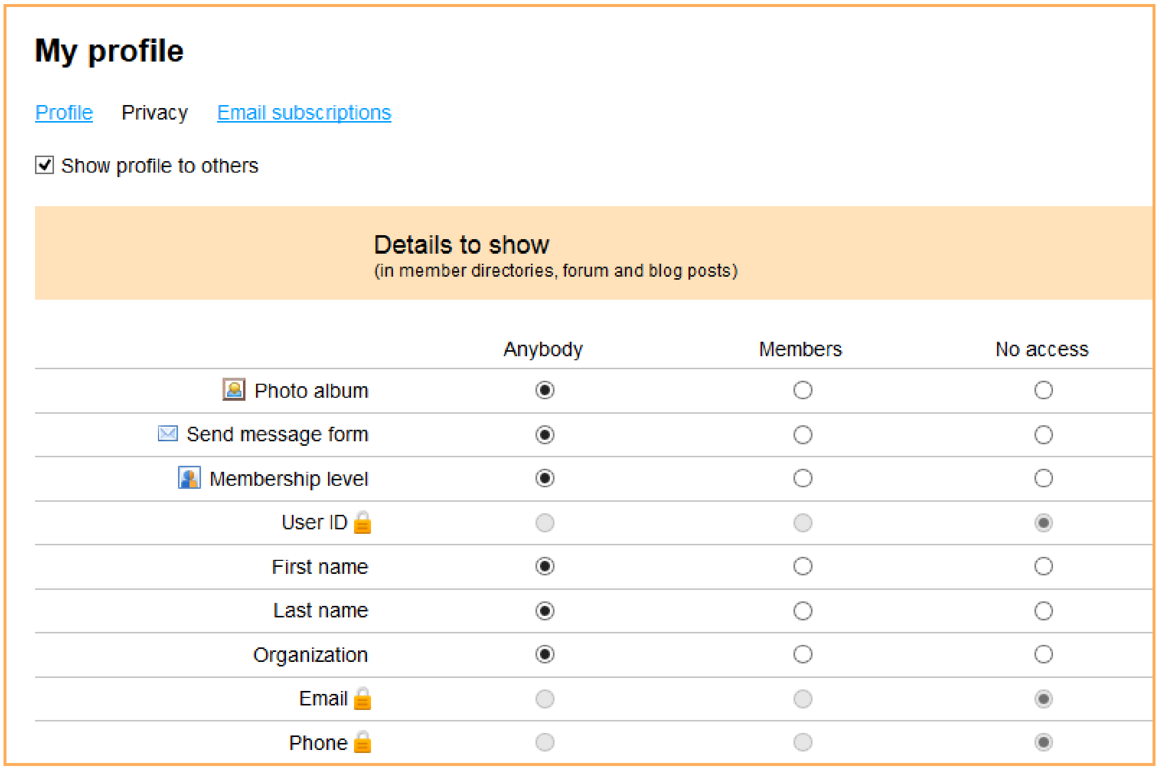
Read more/less

To change their privacy settings, a member follows these steps:

1. Logs into their Wild Apricot account.
2. Clicks the **View profile** link to view their member profile. Depending on the theme, their name may appear as the link.
3. Click the **Privacy** link.
4. Click the **Edit profile** button to enter edit mode.



5. The member can now choose who can view their personal information. If a lock icon appears beside a field, the member cannot change the privacy setting for that field.



6. Once they are finished changing their privacy settings, the member clicks the **Save** button.

Effect of privacy settings on blogs and forum posts

Normally, blog topics and forum posts will identify the author using their first and last name. If a member's profile has been hidden – the **Show profile to others** option within their privacy settings is unchecked – then they will be identified as *Anonymous*. If both their first name and last name are hidden to the current visitor, they will be identified as *Anonymous member*.

On this page:

Expand all sections

See also:

- Unsubscribing to emails

Member photo album settings

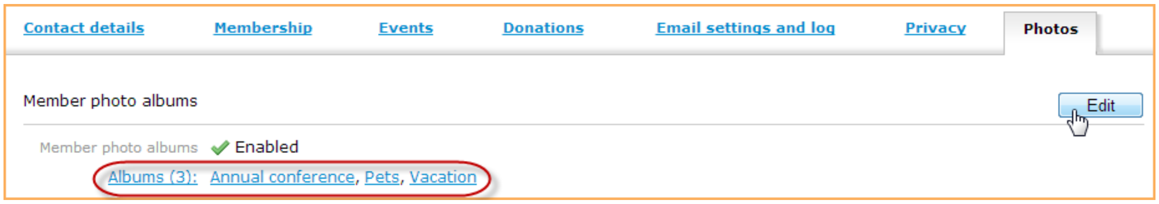
Member photo album settings

From the Photos tab on members' contact records, you can disable member photo albums for individual members. You can also view the photo albums the member has created.

Member photo albums are collections of photos that can appear on a member's profile. Members can create multiple photo albums and upload photos to their albums. Member photo albums are different from the photo album pages that can be added to a Wild Apricot site.

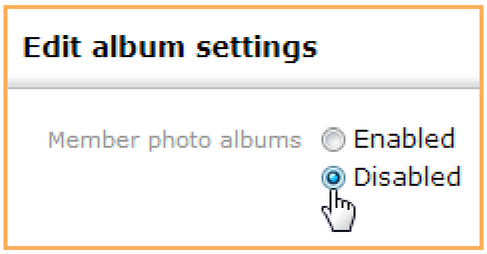
After enabling photo albums for all members, an administrator can disable them for individual members from the **Photos** page of their contact record. If member photo albums have not been enabled for all members, the **Photos** page will not be available for individual members.

On the **Photos** page, you can see whether photo albums have been enabled for this member, and if so, how many photo albums the members has, and the names of the albums.



Clicking on the **Albums** link will take you to the member's profile, where their photo albums appear. Clicking on the name of a member photo album will take you to that album.

To change whether photo albums are enabled for this member, click the **Edit** button. Once in edit mode, you can click the **Enabled** or **Disabled** o ption to enable or disable photo albums for this member.



After you have made your selection, click the **Save** button.

Administrators can control access to all member photo albums by other members and by non-members from the Member privacy settings screen, and to photo albums for individual members from the contact record's Privacy tab.

Deleting and archiving member and contact records

Deleting and archiving member and contact records

If a member is lapsed for a considerable period of time, you might want to remove the person from your contact database so that they no longer count towards your database limit. Rather than deleting the member's contact record, you can archive the record so it can be restored at a later date. Archived records are automatically excluded from receiving emails and do not count towards your database limit .

Once archived, a record can be deleted at any time. Deleting contacts will permanently remove them from your Wild Apricot database, along with their event registrations and invoices.

> When you archive a bundle administrator, all members of the bundle will be archived along with the administrator. After archiving, you can restore bundle members individually.

You can archive contact records one at a time or in bulk. You can also set the renewal policy for your membership levels so that members are automatically archived if they don't renew their membership within a certain number of days. For more information on automatically archiving members as part of your renewal policy, see Enabling renewal reminders and actions.

> Only full administrators and membership managers can archive and delete contacts. For more information, see Managing site administrators.

Archiving and deleting a single contact

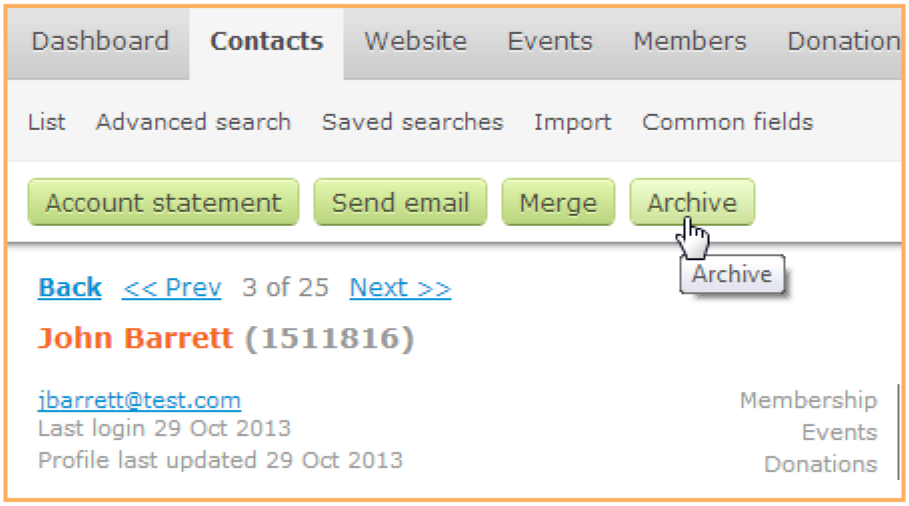
SHOW ME (0:46)

To delete a single contact, you start by archiving the contact record.

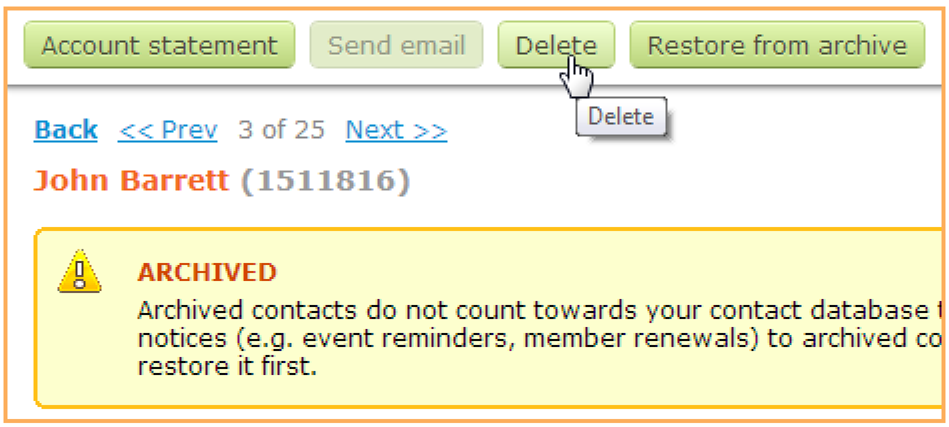
Read more/less

An archived record can restored at a later date, unlike a deleted record.

To archive a contact record, display the contact record then click the **Archive** button.



With the record archived, you can now delete it by clicking the **Delete** button.



You will be asked to confirm your request to delete the record. Click **OK** to proceed with the deletion.

Instead of deleting the archived record, you can restore it by clicking the **Restore from archive** button.

Archiving multiple contacts

You can archive multiple contacts by importing a properly formatted spreadsheet. Once contacts are archived, you can delete all archived records.

Contacts with administrative permissions are excluded from bulk archiving. You must archive these contacts one at a time.

To archive multiple contacts through importing, use the following procedure:

Read more/less

1. Export the contacts you want to archive to a spreadsheet.
2. Open the spreadsheet in Excel and set the **Archived** column to **Yes** for the contacts you want to archive.
3. Save the spreadsheet.
4. Import the spreadsheet.

You cannot archive a contact through import if the contact has recurring payments enabled. You must first cancel the recurring payments.

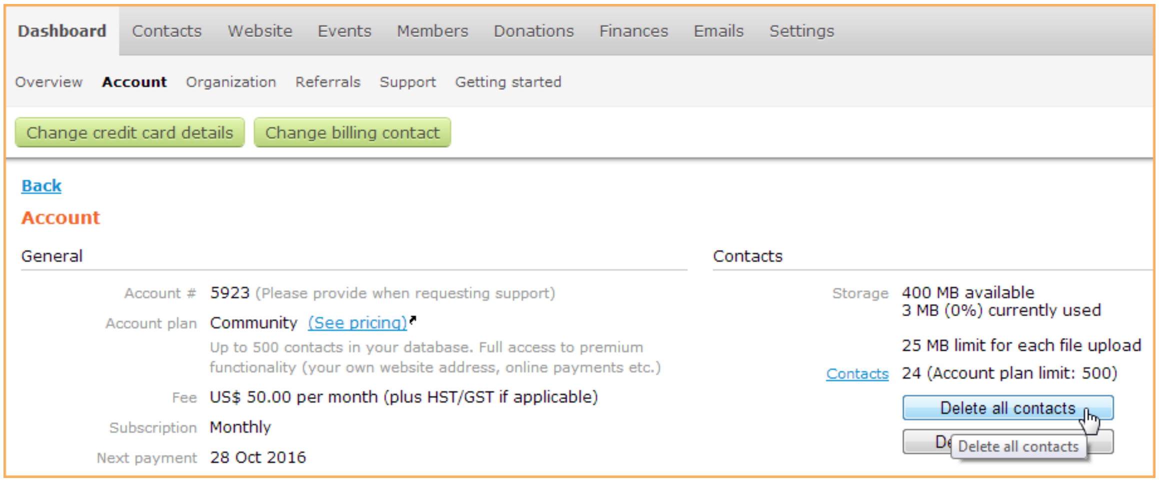
Deleting all archived contacts

Deleting contacts will permanently remove them from your Wild Apricot database.

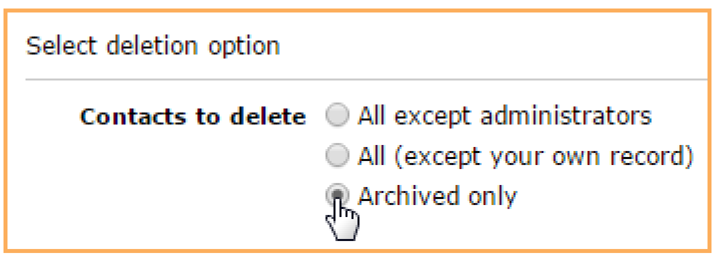
To delete all archived contacts in your Wild Apricot database, follow these steps:

Read more/less

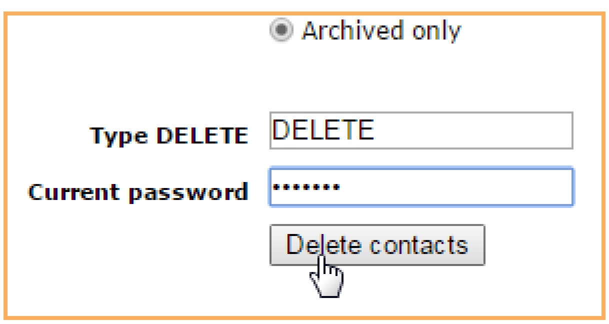
1. Hover over the **Dashboard** menu and select the **Account** option.
2. From the Account screen, click the **Delete all contacts** button.



3. Click the **Archived only** option.



4. Type the word **DELETE** in the field provided.
5. Enter your password in the field provided.
6. Click the **Delete contacts** button.



7. You will be asked to confirm your request to delete the selected records. Click **OK** to proceed with the deletion.

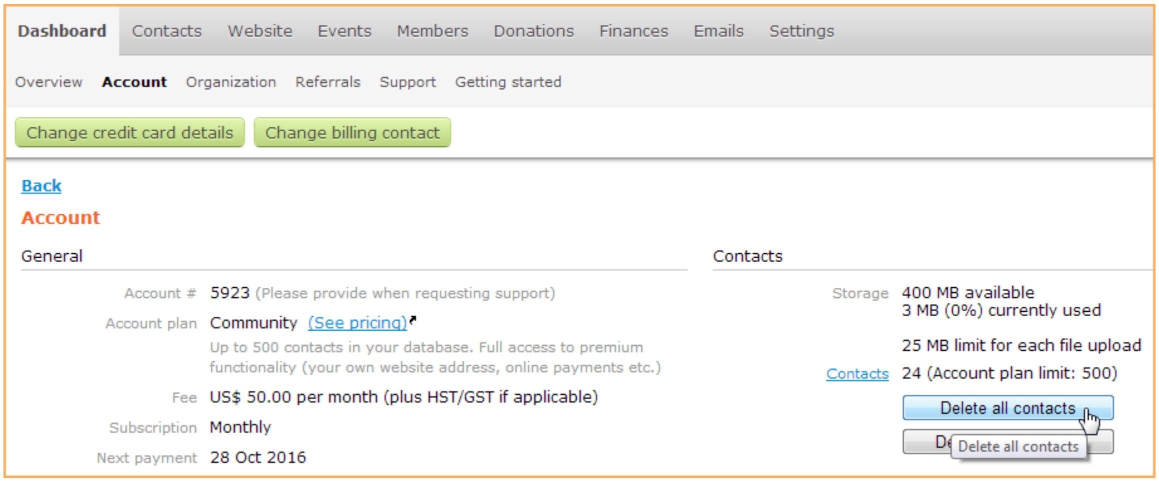
Deleting all contacts

Deleting contacts will permanently remove them from your Wild Apricot database.

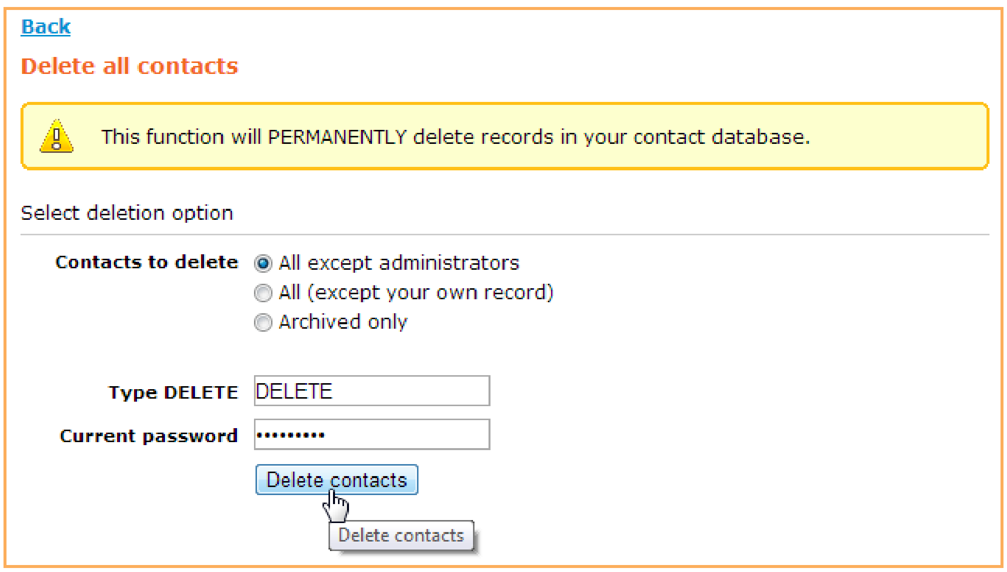
To delete all contacts in your Wild Apricot database – except your own record and optionally, those of administrators – follow these steps:

Read more/less

1. Hover over the **Dashboard** menu and select the **Account** option.
2. From the Account screen, click the **Delete all contacts** button.



3. Choose whether you want to delete all contacts except administrators or all contact records except your own.
4. Type the word **DELETE** in the field provided.
5. Enter your password in the field provided.
6. Click the **Delete contacts** button.

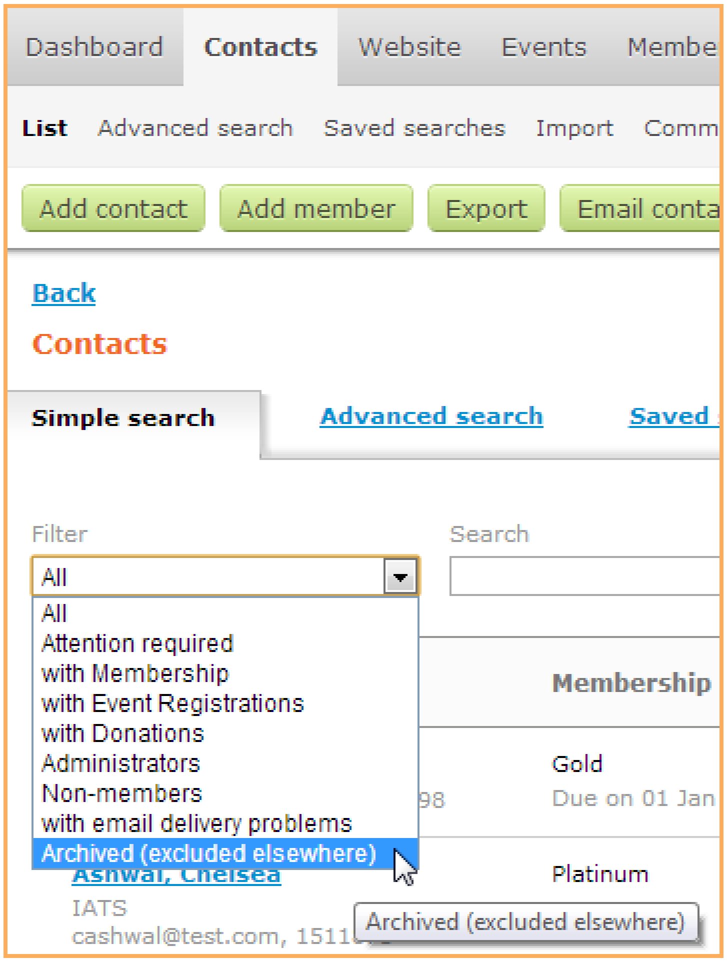


7. You will be asked to confirm your request to delete the selected records. Click **OK** to proceed with the deletion.

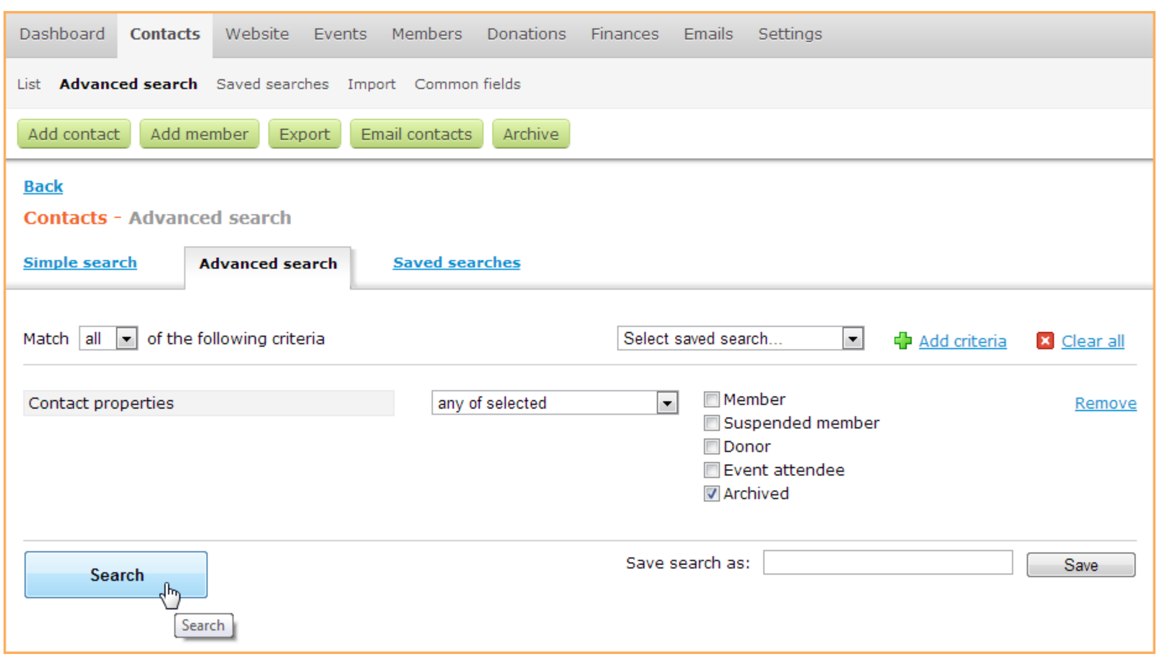
Finding archived records

Normally, archived records do not appear in your contact list. To view a list of archived records, go to the simple search page in the Contacts module and select the **Archived** filter.

Read more/less



You can also use an advanced search to search for archived contacts. When you add **Contact properties** to your search criteria, you can limit the search to archived contacts, and further limit the search to archived members.

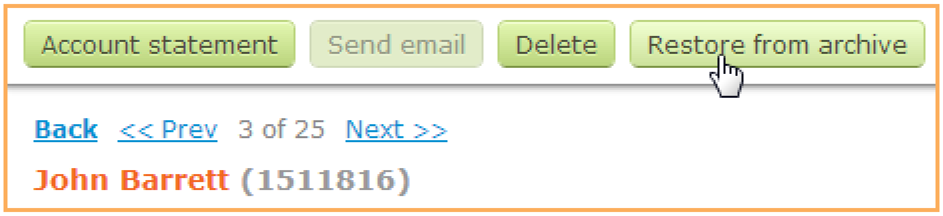


To view the archived record, click it within the search results.

Restoring individual archived contacts

Once a contact record has been archived, the **Archive** button on the contact details tab is replaced by a **Restore from archive** button.

Read more/less



Clicking the **Restore from archive** button will restore the contact record from archived to active status.

You can also restore archived records in bulk using Wild Apricot's exporting and importing functions. Within the spreadsheet, set the **Arc hived** column to **No**.

Archived contacts are automatically restored when they log in to your Wild Apricot site, register for an event, apply for membership, make a donation, or subscribe to a forum or forum topic. If the contact is a member, their membership level and status will also be restored.

Restoring multiple archived contacts

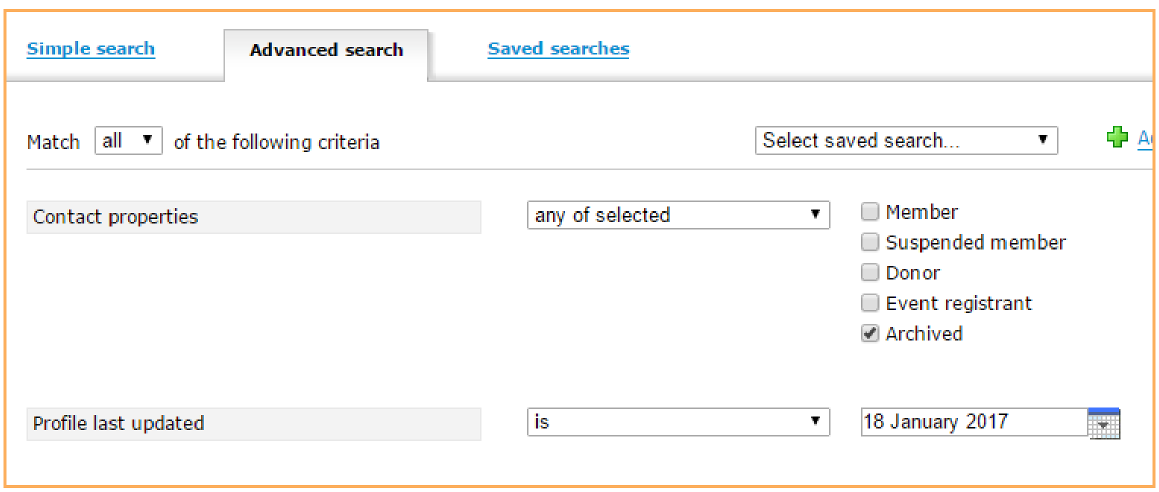
If you've archived a number of contacts in bulk, you can restore the archived contacts all at once. To restore contacts archived in bulk together, follow these steps:

Read more/less

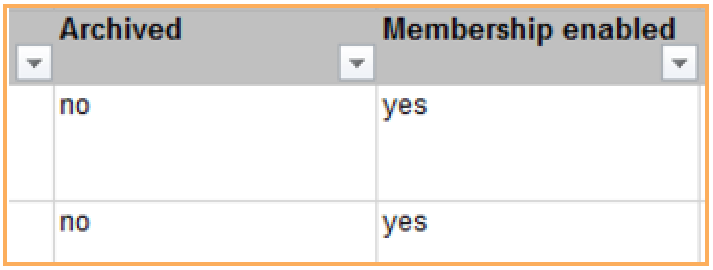
1. Go to **Advanced search** under **Contacts** and add the following search criteria:

Criteria	Operator	Value
Contact properties	all of selected	Archived
Profile last updated	is	the date you archived the contacts

In the following example, the contacts to be restored were archived together on January 18, 2017.



2. Click the **Search** button to perform the advanced search.
3. From the list of your archived contacts, click the **Export** button.
4. On the **Export contacts** dialog that appears, check only the following fields to be exported: User ID, Archived, Membership enabled, Membership level, Membership status, Renewal due.
5. Click the **Export** button.
6. Open the exported spreadsheet file in Excel or any other spreadsheet program, and change the value of all **Archived** cells from *yes* to *no*, and the value of **Membership enabled** cells from *no* to *yes*. Do not modify the **Membership enabled** cell if it is blank.



Archived	Membership enabled
no	yes
no	yes

7. Save the changes to your spreadsheet file.
8. Within Wild Apricot, import the spreadsheet file you just updated. For instructions on importing a spreadsheet, click here. Once the import is complete, your contacts will be restored, along with their previous membership and membership status.

On this page:

Expand all sections

Customizing database fields

Customizing database fields

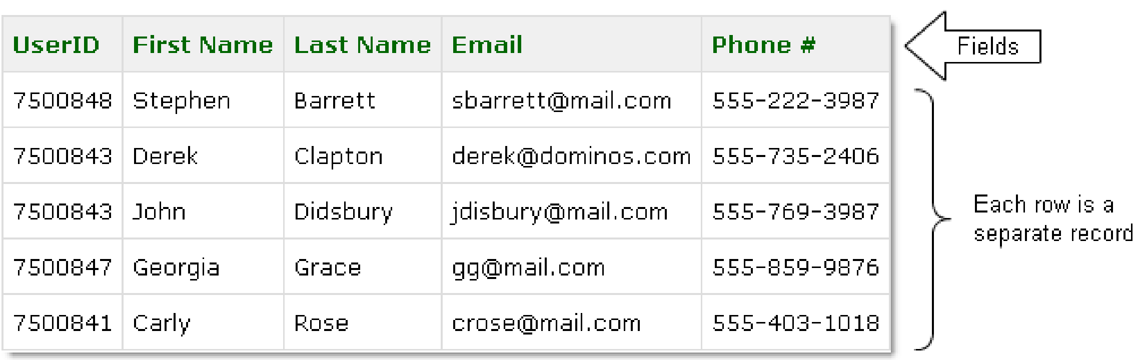
Contacts, records, and fields explained

Everyone in your Wild Apricot database is a *contact*. A contact can be a member, an event attendee, a donor, a newsletter subscriber, or any combination of these roles.

Read more/less

Contacts can be added automatically through your website, added manually by an administrator, or imported in bulk.

Information about each contact is stored in a separate *record*, with each record storing different chunks of information in *fields* (e.g. first name, last name, email address).



UserID	First Name	Last Name	Email	Phone #
7500848	Stephen	Barrett	sbarrett@mail.com	555-222-3987
7500843	Derek	Clapton	derek@dominos.com	555-735-2406
7500843	John	Didsbury	jdisbury@mail.com	555-769-3987
7500847	Georgia	Grace	gg@mail.com	555-859-9876
7500841	Carly	Rose	crose@mail.com	555-403-1018

You can customize your contact database – and your forms – by adding, modifying, reordering, and deleting database fields.

In addition to their contact record, each contact can also have a membership record, and one or more event registration records or donation records.

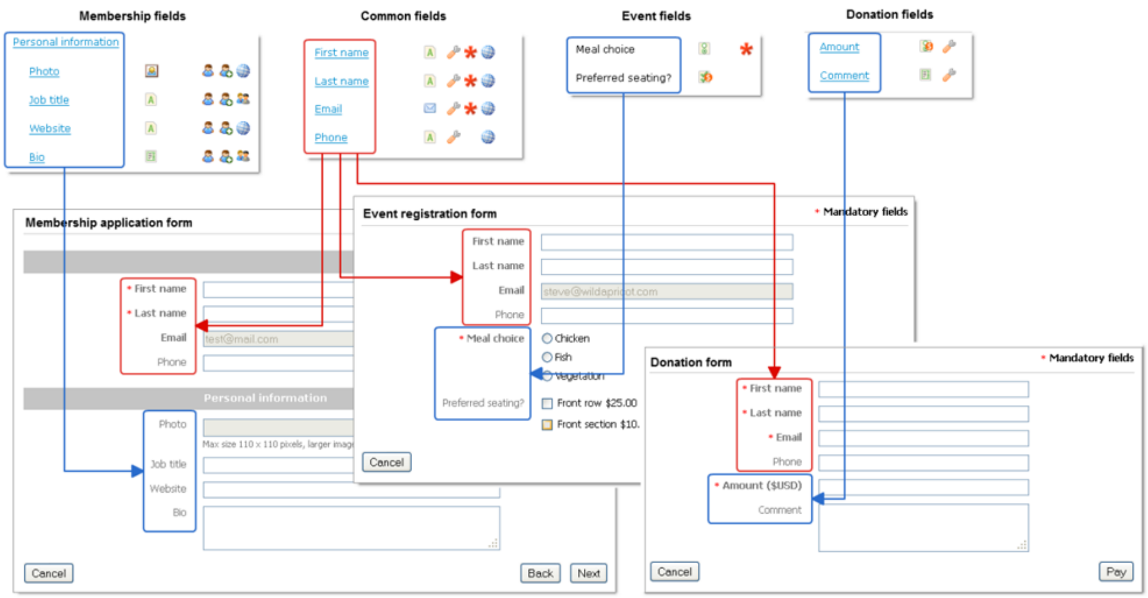
Common vs specialized fields

Wild Apricot database fields are divided into two classes: *common fields* – fields that apply to all records (e.g. first name, last name, email address) – and additional fields that only apply to membership applications, event registrations, or donations.

Read more/less

Each record is a combination of common fields and fields specific to that type of record. For example, a membership record will consist of membership fields and common fields, while a donation record will consist of donation fields and common fields.

The forms that appear to the user – and are used to create records – also combine both types of fields. A membership form, for example, will display both common fields and membership fields.



To customize a form, you can add or remove fields, either common fields or fields specific to the form.

The values entered in common fields on membership application forms will update the corresponding fields in the applicant's contact record (if one already exists), but the values entered in common fields on event registration forms are stored separately from the contact record within event registration records. Similarly, the values entered in common fields on donation forms are stored separately within donation records.

Adding and modifying database fields

You can add any number of common fields or other database fields.

Read more/less

You can set membership fields to apply only to members at specific membership levels. Since common fields are automatically added to all forms (membership, event, and donation forms), fields that apply to all forms should be created as common fields.

To view, modify, or add common, membership, donation, or event fields, follow these steps:

For...	click...
Common fields	**Common fields** under the **Contacts** menu
Membership fields	**Membership fields** under the **Members** menu
Donation fields	**Donation fields** under the **Donations** menu
Event fields	**Registration form** tab from the event's details page. Event fields are specific to each individual event.

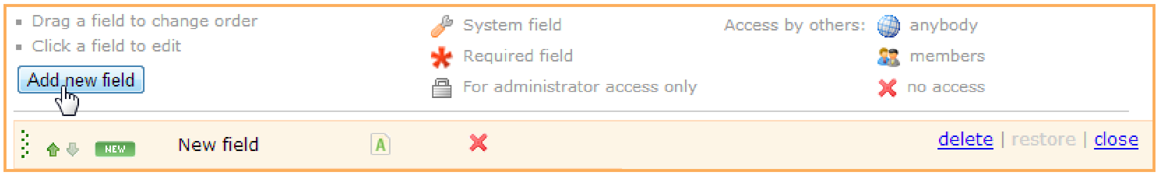
From the screen that appears, you can add, modify, reorder, and delete fields. Any changes you make will be immediately reflected on screen but will not be applied elsewhere until you click **Save all changes**. Once your changes are saved, they will be reflected on applicable online forms, contact records, and directories.

Adding a field

To add a new field from the **Customize fields** screen, click **Add new field**.

Read more/less

For new fields, you can set the field type and change field settings.



> You can also add contact and membership fields via importing. For more information, see Importing members and other contacts.

Modifying a field

To modify an existing field, click it within the list.

Read more/less

With the field selected, you can change various field settings but not the field type.

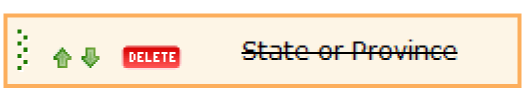
Deleting a field

To delete a field, click it within the list, then click the **delete** link on the right.

Read more/less

> You cannot delete system fields (Member ID, First name, Last name, Organization, Email, and Phone). You can, however, hide a system field (other than Member ID or Email) by setting it to admin only access.

After you delete a field, it appears crossed out in the field list until you save your changes.



While the field appears crossed out, you can restore it by clicking the restore link.

> Deleting a field will automatically lose all data stored in that field for all contacts.

Reordering fields

To change the order in which fields appear, you can drag and drop fields within the list, or you can click the green up and down arrows beside a field.

Field types

You can only choose the field type when you create a new field. You cannot change the type for an existing field.

Read more/less

The following field types are available:

Type	Description
Text	Simple text field, used for short entries (up to 200 characters).
Multiline text	Used for longer text entries (up to 3,000 characters).
Multiple choice	A set of checkboxes (up to 100 characters per item). For instructions on adding choices, see Adding choices to multi-option fields below.
Radio buttons	A set of mutually exclusive choices (up to 100 characters per item), arranged like buttons on a car radio. For instructions on adding choices, see Adding choices to multi-option fields below.
Multiple choice with extra charge	(*Event and membership fields only*) Allows you to provide optional extras (displayed as checkboxes) at an additional cost. For more information, see Extra membership costs and Extra event registration costs - dynamic event pricing.
Radio buttons with extra charge	(*Event and membership fields only*) Allows you to display a set of mutually exclusive options at an additional cost. For more information, see Extra membership costs and Extra event registration costs - dynamic event pricing.
Extra charge calculation	(*Event and membership fields only*) Provides the ability to order multiple items, or to charge an additional fee proportional to a value entered by the applicant or registrant. For organizational members, you might want to charge an extra fee based on their revenue, number of staff, or grants they've received. For more information, see Using the extra charge calculation field (below).
Dropdown	A set of mutually exclusive choices, arranged in a drop-down list. For instructions on adding choices, see Adding choices to multi-option fields below.
Picture	(*Common and membership fields only*) Used to display a photo, company logo, or online avatar. For more information, see Addin g member or contact pictures.
Rules and terms	A checkbox with a link to a page displaying the terms of use or contractual conditions that apply to your site. For more information, see Rules and terms field below.
Date	Displays a calendar control that can be used to select a date.
Section divider	Used to group and separate fields.

Workaround
To change the field type for an existing field, export all contacts to an Excel file, delete the field, re-create it as a new field type, then re-import the saved Excel file.

Field settings

You can change field settings for new and existing fields. Field settings appear when you click a field within the list.

Read more/less

The following settings are available for one or more field types:

Setting	Field types	Description
Field label	All	The name used to identify the field, or the label for the section divider. You cannot use the same name as a common field.
Required field	All except section divider	Controls whether the field has to be filled out before the form can be submitted. For all self-service online forms, (member application, email subscription, donation, and event registration), the Email field is always required.
For administrator access only	All except section divider	Identifies this as an internal field that can only be seen or edited by an administrator. For more information, see I nternal use fields.
Items	Multiple choice, radio buttons, dropdown	Choose the options to be displayed. For more information, see Adding choices to multi-option fields below.
Applications	Extra charge membership fields	Indicate whether to include in new membership application forms. If enabled, you can also control whether the cost should be prorated over a partial period of time.
Renewals	Extra charge membership fields	Indicate whether to include in membership renewal form. If enabled, you can also control whether members can change their original selection when renewing.
Member access	All membership fields except section divider	Controls whether the member is allowed to view or modify this field. The following choices are available: **Edit in own profile:** members can edit the field by logging into the site and editing their profiles. **Edit in application:** members can only edit the field when filling in the application form. **View only:** members can view the contents of the field but only an administrator can change it. **No access:** administrator-only field that is hidden from members and the public. For more information, see Internal use fields.
Others access	All except section divider	Controls who is allowed to view this field. This is a default setting which can be changed by each member. For more information, see Member privacy settings.

Use in	All membership fields except section divider	Determines whether the field applies to all membership levels or is restricted to one or more specific membership levels. For more information, Creating fields for different membership levels.
Donation options	Amount donation field	Allows you to control how the donor indicates the donation amount. For more information, see Donation forms.
Multiplier	Extra charge calculation	Determines the value to be applied to the visitor's entered value, and whether the multiplier is the unit cost or a percentage. For more information, see Using the extra charge calculation field (below) .
Limit order to	Extra calculation	For extra charge calculation fields where the multiplier is the unit cost, determines the minimum and maximum number of items that can be ordered. For extra charge calculation fields where the multiplier is a percentage, determines the minimum and maximum resulting charge. For more information, see Using the extra charge calculation field (below) .
Field instructions	All except section divider	Instructions explaining how to use this field. For information on controlling the appearance of field instructions, see Addin g field instructions.

Making fields required or mandatory

If you want to make a field required or mandatory, so that the field has to be filled out before the form can be submitted, click the **Required field** checkbox within the field settings. For all self-service online forms, (member application, email subscription, donation, and event registration), the Email field is always required.

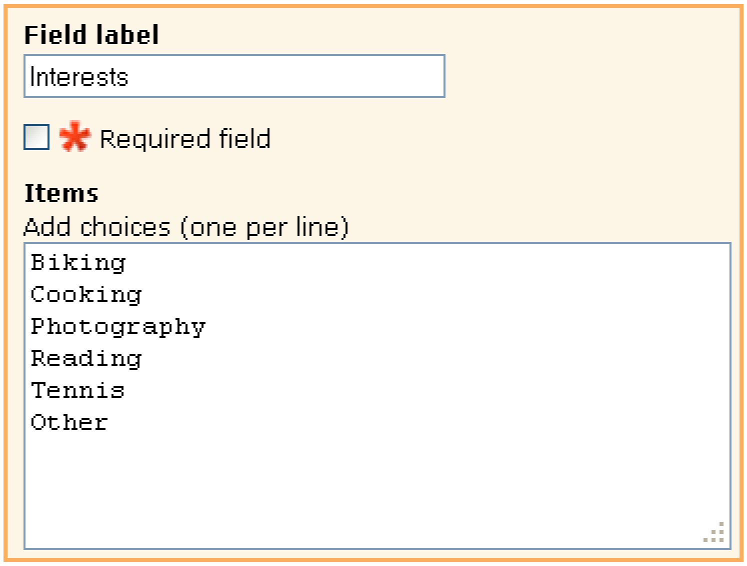
Adding choices to multi-option fields

When you create a field using the **Multiple choice**, **Radio buttons**, or **Dropdown** type, you add items that represent choices for the user.

Read more/less

(**Extra charges** fields use a different approach. For information, see Extra membership costs and Extra event registration costs - dynamic event pricing.)

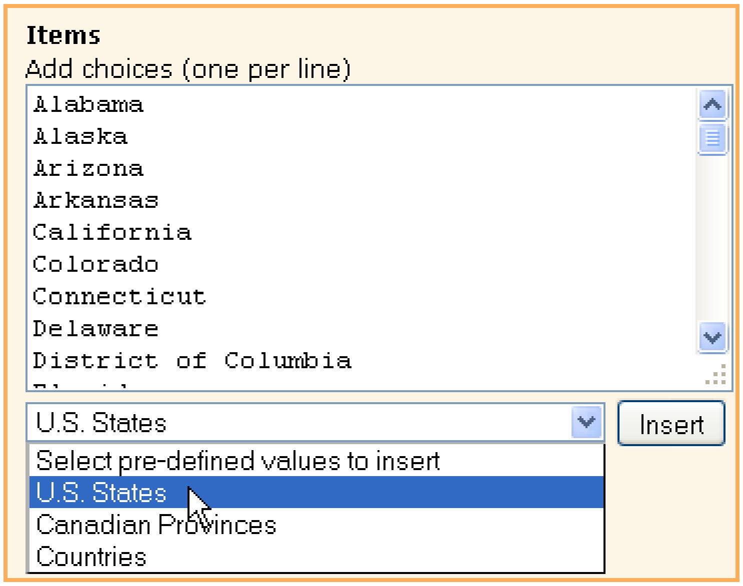
Using the **Items** text box, you add one item per line, up to 100 characters per item. (Press **Enter** on your keyboard to move to the next line). You can also paste text from another program to speed up text entry.



There are some pre-defined lists that you can use to add large sets of choices:

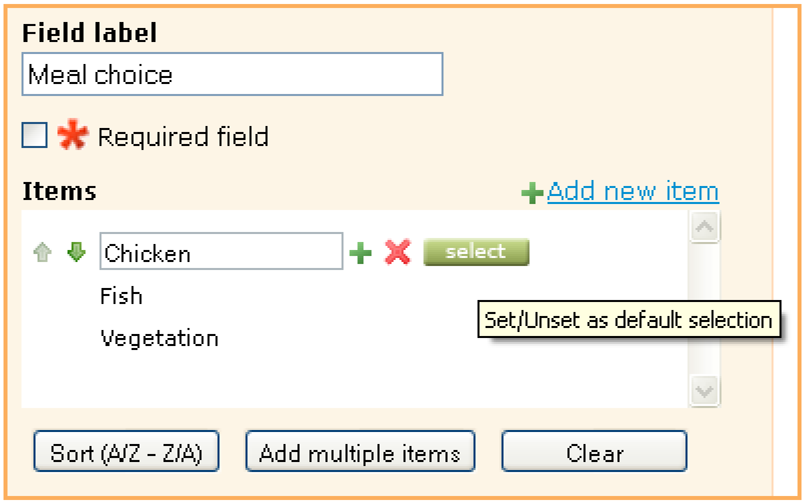
- U.S. states
- Canadian provinces
- Countries

To use one of these lists, select the one you want to use from the list box labeled **Select pre-defined value to insert** then click **Insert**.



Once you are finished populating your list, click **Done** to save your list. You still need to click the **Save all changes** button at the top of the screen to finalize all the changes to this and any other fields you might have added or modified.

After you click **Done**, new options appear to allow you to manage your list.



The following options apply to the entire list:

Option	Description
Sort	Sorts the list by alphabetical order. The first click will sort it from A to Z. A second click will sort it from Z to A.
Add multiple items	Opens a window with a text box where you can multiple items one line at a time. Existing items will not appear in the list. New items will be added to the bottom of the list. You can move them individually or use the **Sort** button to re-sort the list.
Clear	Removes all items from the list.

If you click on an item within the list, you can change its text. As well, the following options now appear beside the item:

Option	Description
	Moves the item up or down within the list.
	Add a new item below the selected one. You can also add a new item to the bottom of the list by clicking on the **Add new item** link at the top of the item list.
	Removes the item.
select unselect	Select/deselect the item as the default choice. Radio buttons and drop-downs can only have one default selection, while checkboxes can have multiple items selected by default.

You can reorder items within multi-option fields on an event registration form without affecting choices already entered and stored for event registrants. If you rename an item, existing choices will appear under the new name. Deleting an item, however, will remove that selection for all registrants who chose it.

Using the extra charge calculation field

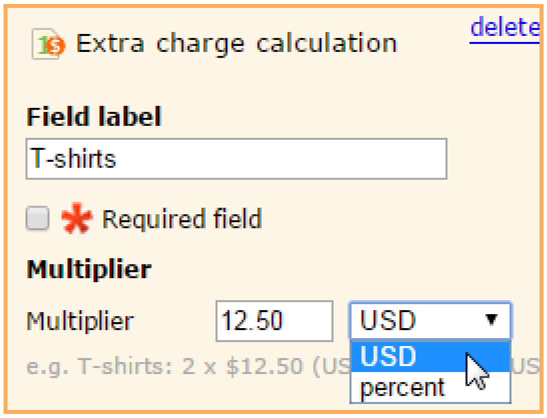
The extra charge calculation field is similar to the multiple choice with extra charge field and the radio buttons with extra charge field, but allows you to specify a unit cost for multiple orders, or apply a percentage to charge dynamic fees based on some factor.

Read more/less

For example, you might want to provide an option to purchase any number of t-shirts, or charge a variable membership or event fee based on organization size or income.

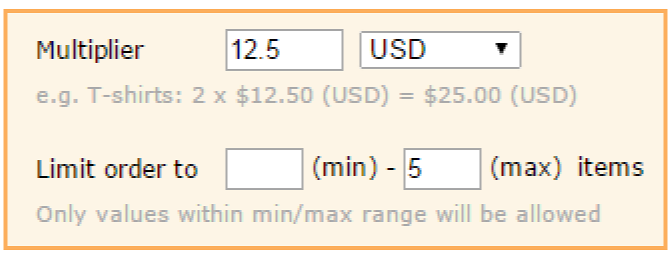
The unit cost or percentage is applied to the value entered by the applicant or registrant in the membership application form or event registration form.

The first step in setting up a calculated extra charge field is to choose whether to specify a unit cost or a percentage to be applied to the entered value. To do so, click the dropdown that initially displays the currency you choose in your online payment settings ...

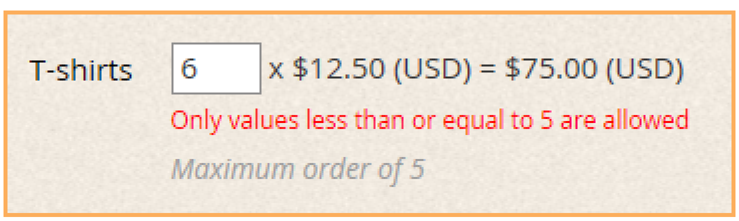


...and choose the currency if you want to specify a unit cost, or **percent** if you want to apply a percentage to the entered value.

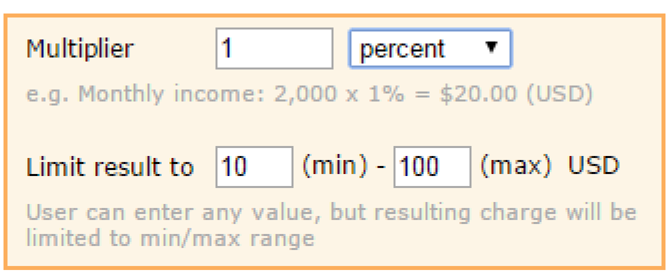
If you choose the currency so you can specify a unit cost, you can also specify the minimum and maximum number of items you visitor can order.



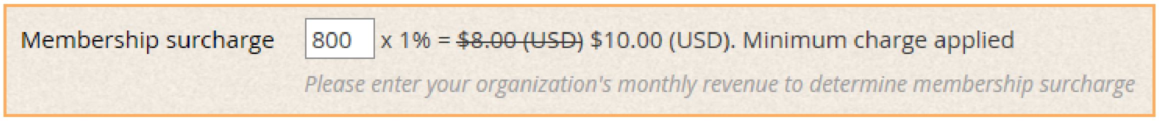
Values below the minimum or above the maximum will not be accepted.



If you are applying a percentage, you can specify a minimum and a maximum resulting value.



Values entered by the applicant or registrant that result in charge below the minimum or above the maximum will be automatically adjusted to fit within the limits.

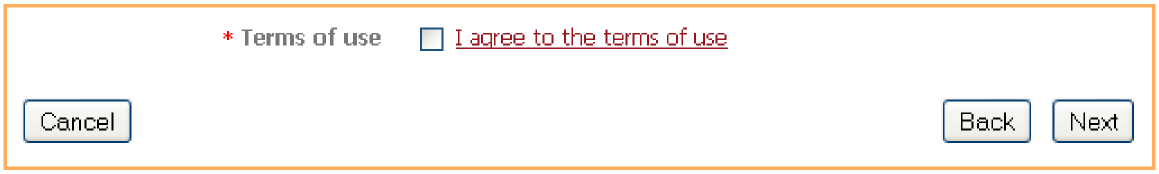


Using the rules and terms field

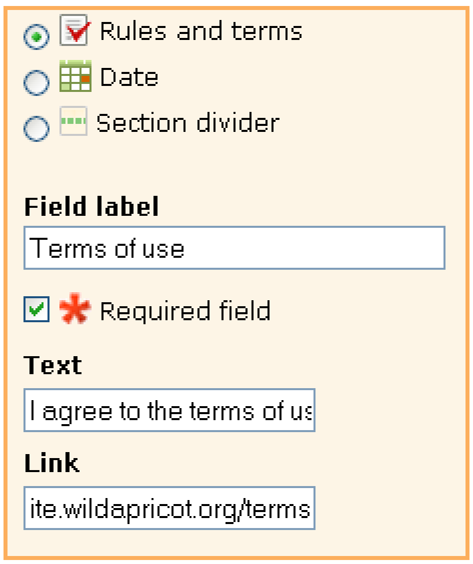
The **Rules and terms** field is a special field that displays a checkbox along with a link to a page displaying the terms of use or contractual conditions that apply to your site.

Read more/less

Adding it to a membership form, for example, allows you to require applicants to acknowledge certain policies before applying for membership.



To set up a **Rules and terms** field, you enter the text for the link (e.g. I agree to the terms of use) and provide a link to the webpage or document with the actual rules and terms, which you must create separately yourself.



⚠ You can also customize Wild Apricot's terms of use system page.

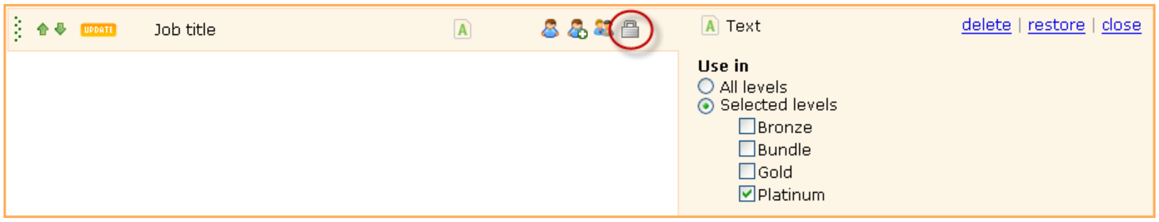
Restricting fields by membership levels

You can restrict membership fields to specific membership levels.

Read more/less

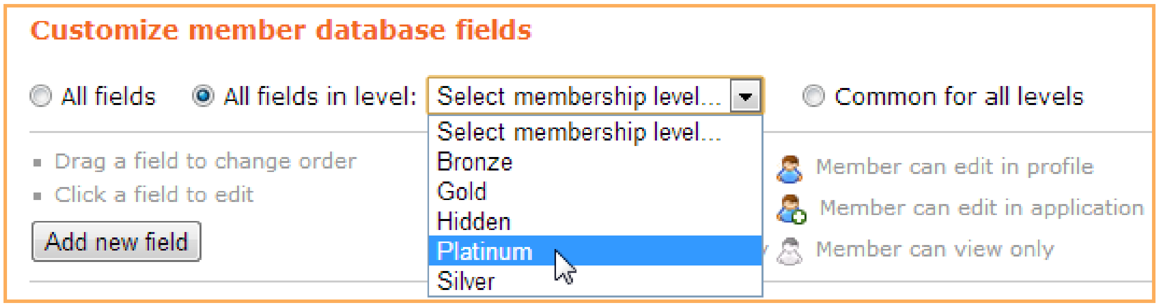
To restrict a membership field to one or more membership levels, follow these steps:

1. Select the field within the list of membership fields.
2. Under **Use in**, click **Selected levels**.
3. Check each of the membership levels you want this field to apply to.



A lock icon will appear to indicate that the field is restricted to particular membership levels.

To quickly review which fields belong to what level you can filter the membership fields by membership level. You can display all fields, fields for a particular membership levels, or fields common to all membership levels.



Internal use fields

You may want to track information about your contacts without sharing the information with them or anyone else. To do so, you can set a field as internal use only.

Read more/less

For example:

- You want to track whether people attended the events they have registered for, so you create a field called **Event attended** and mark their attendance in the field on their Event registration details screen.
- You want to recruit more female members, so you add a field called **Gender** to track this information.

You can make any common or membership field you create an internal use field by setting access to **For administrator access only** (for common fields) or **Internal use only** (for membership fields).

Administrator-only fields are displayed under **Internal use** on the Contact details screen. You can click the **Edit** button to modify internal use field values for a contact.

Any time a contact fills out an application, records a donation, or registers for an event, the internal use fields and their values for that contact are copied to the registration, application, or donation record.

The following fields cannot be set as internal use only:

- User Id (aka Member Id)
- Email

> You can also customize Wild Apricot's terms of use system page.

Workarounds

Changing the field type

There is no easy way to change the field type after creating a field. However, the following workaround can achieve this goal.

1. Export your entire contact list to Excel. Though no changes are necessary to the export file, we recommended that you re-import only the User ID and the specific field(s) you want to update. All other columns/fields in your Excel file can be deleted.
2. Within Wild Apricot, delete the field you want to change and save your changes.
3. Create a new field with the same name as the deleted field, but with the field type you want, and save your changes. (Make sure the field name is not used anywhere in your system e.g. for an event field or a donation field.)

4. Import the Excel file you created in Step 1.

On this page:

Expand all sections

See also:

- Customize event registration form
- Membership application form
- Donation form customization
- Database field limits

Adding member or contact pictures

Adding member or contact pictures

You can allow members or contacts to add pictures to their records. Member photos can appear within member profiles, member directories, featured member gadgets, and on forum posts, depending on various settings, including privacy settings.

Adding picture fields

The first step in adding member pictures is to add a picture field to your common fields – if you want pictures to appear for all contacts – or to your membership fields – if you want pictures to appear for members only.

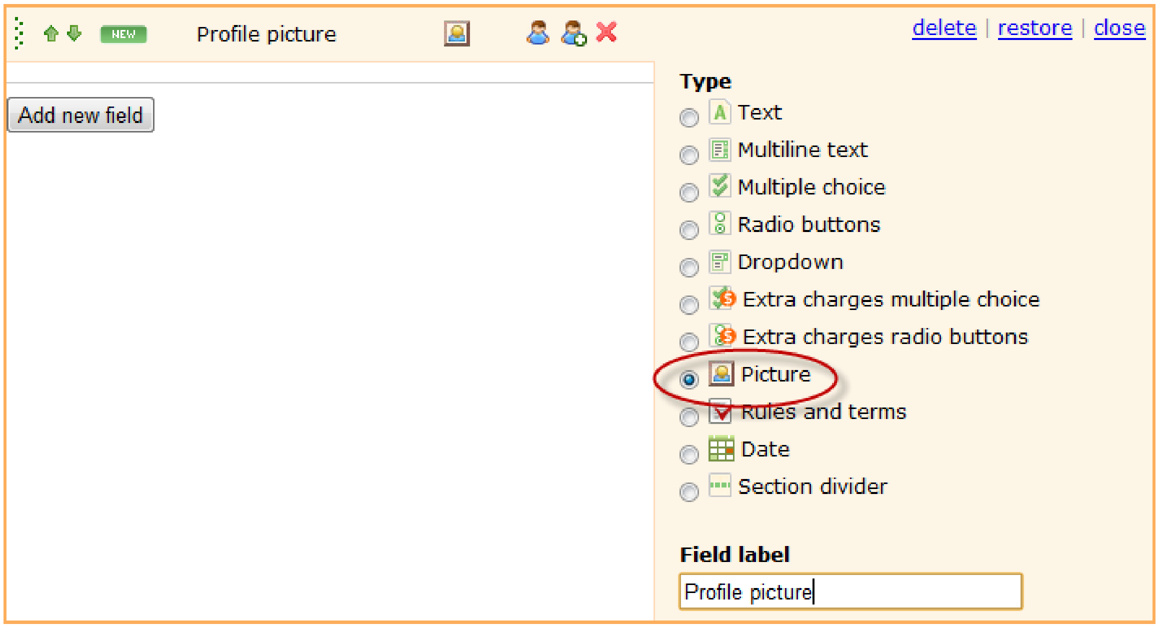
Read more/less

You can add multiple picture fields. For example, you might add one for a profile photo or avatar, and another for a company logo.

> Pictures added using picture fields do not count towards your file storage limits.

To add a picture field to your membership or common fields, follow these steps:

1. To add a picture field to your membership fields, hover over the **Members** menu and select the **Membership fields** option. To add the field to your common fields, hover over the **Contacts** menu and select the **Common fields** option.
2. Click the **Add new field** button.
3. Select **Picture** as the field **Type**.



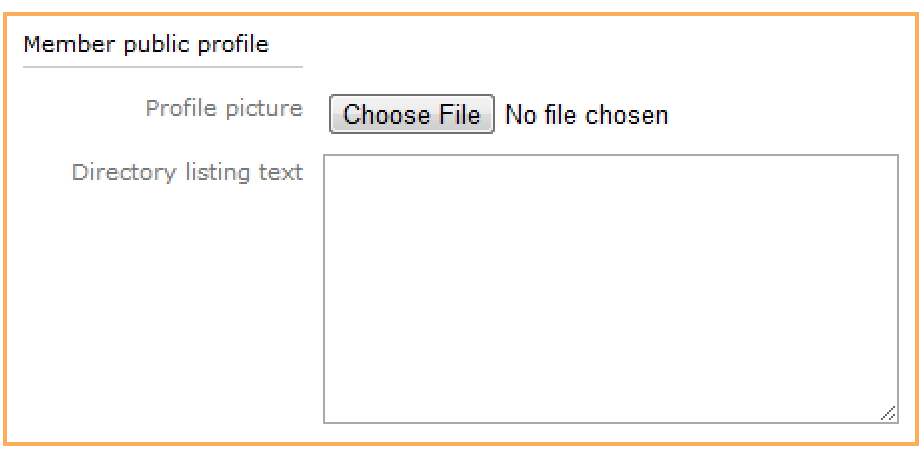
4. Enter a **Field label**.
5. Under **Options**, you can choose whether to restrict the field to admin access only, so that even members cannot add or modify their own pictures.
6. Under **Others access**, you can control who else can view the pictures. Note that this is a default setting which can be changed by each member from their privacy settings.
7. Move your picture field so that the membership fields or common fields appear in the order you want.

8. Click **Save all changes**.

Adding the picture

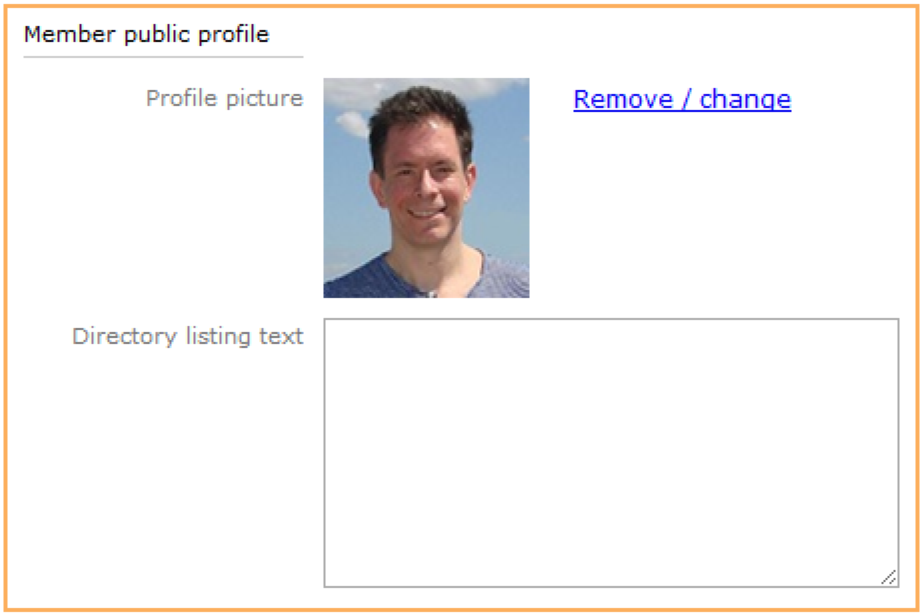
Now, with a picture field in your database, an option to add a picture appears when a new member or contact is added.

Read more/less



Picture fields display images at a maximum size of 110 x 110 pixels. For best results, uploaded pictures should be sized to these dimensions. Images larger than that will be automatically resized for display.

Once the picture appears on the contact details page, you have the option to change or remove it.



Members can also add or modify pictures from their member profiles.

Where pictures appear

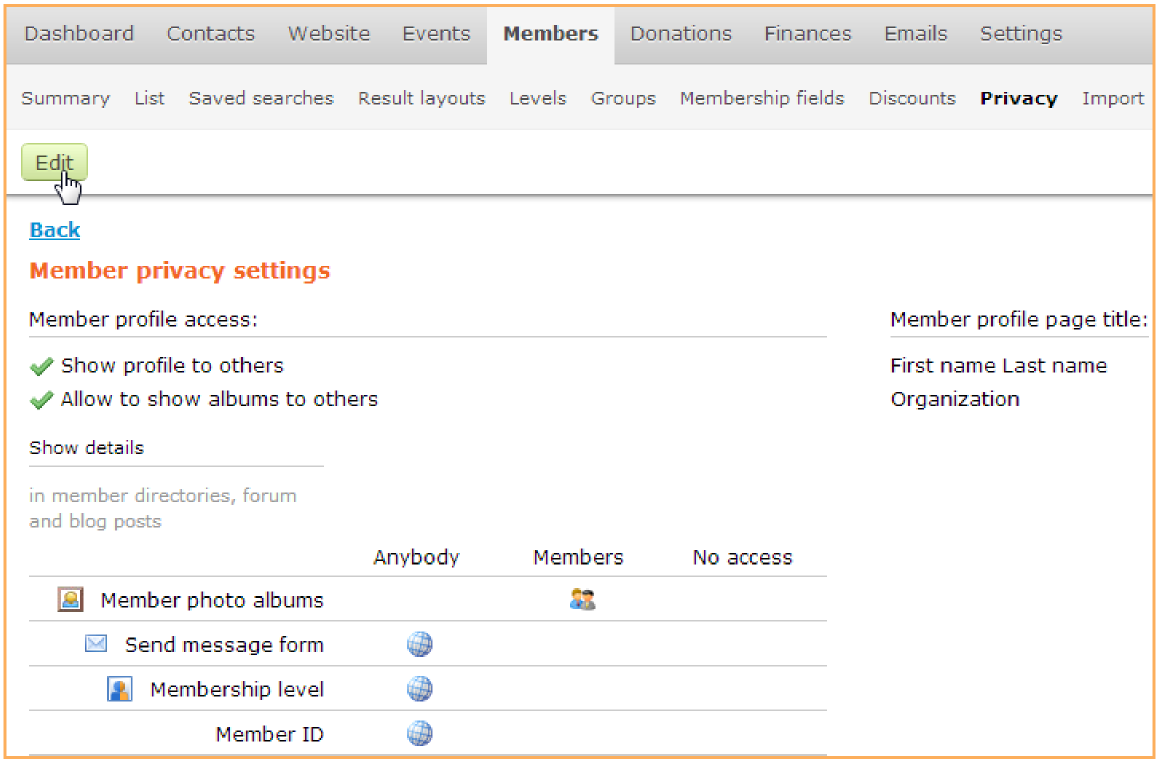
Member and contact pictures will appear on the contact details screen within admin view. A member's picture may also be displayed within their posts on forums, depending on your forum settings, and in member directories and featured member gadgets. Member pictures can also appear on the member's public profile page, accessible from a member directory.

Privacy settings

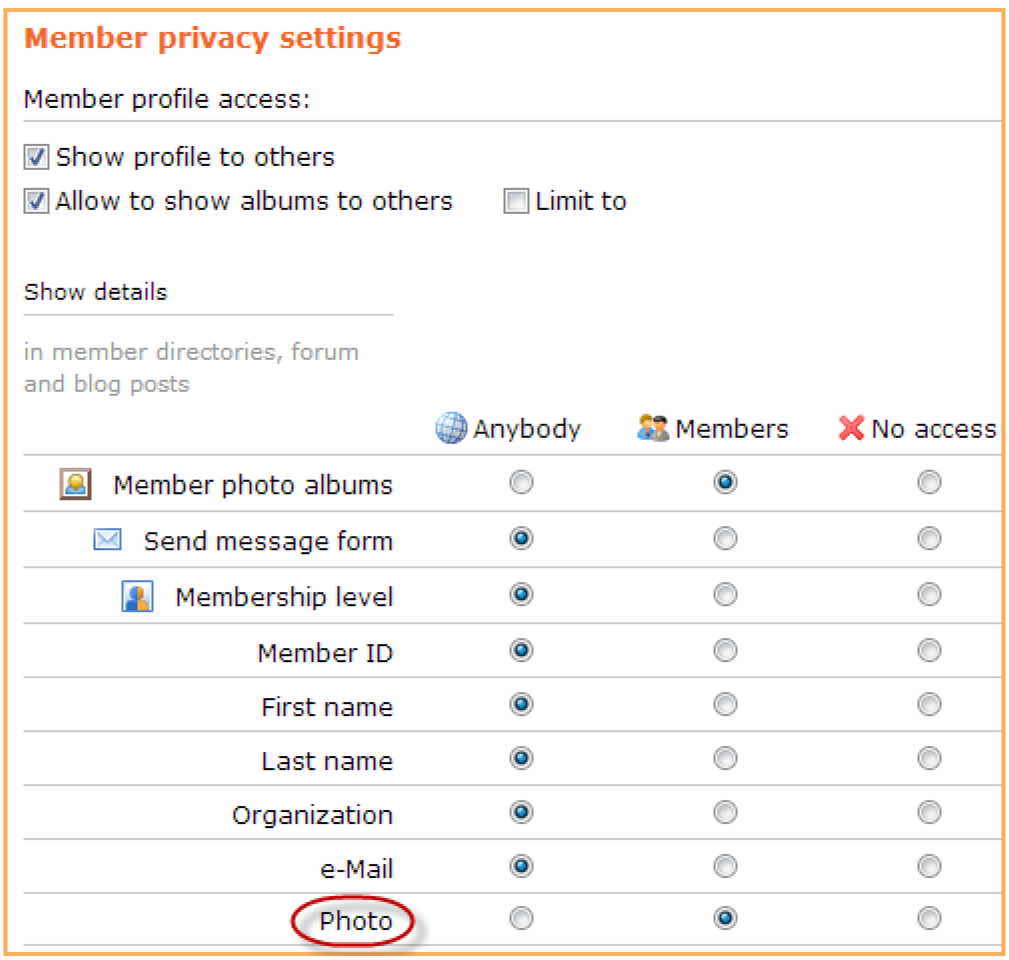
Administrators can control whether member pictures – and other membership data – appear to the public and other members on member directories and forum posts. As well, individual members can override your privacy settings and control whether their pictures and other data will appear to the public and other members.

Read more/less

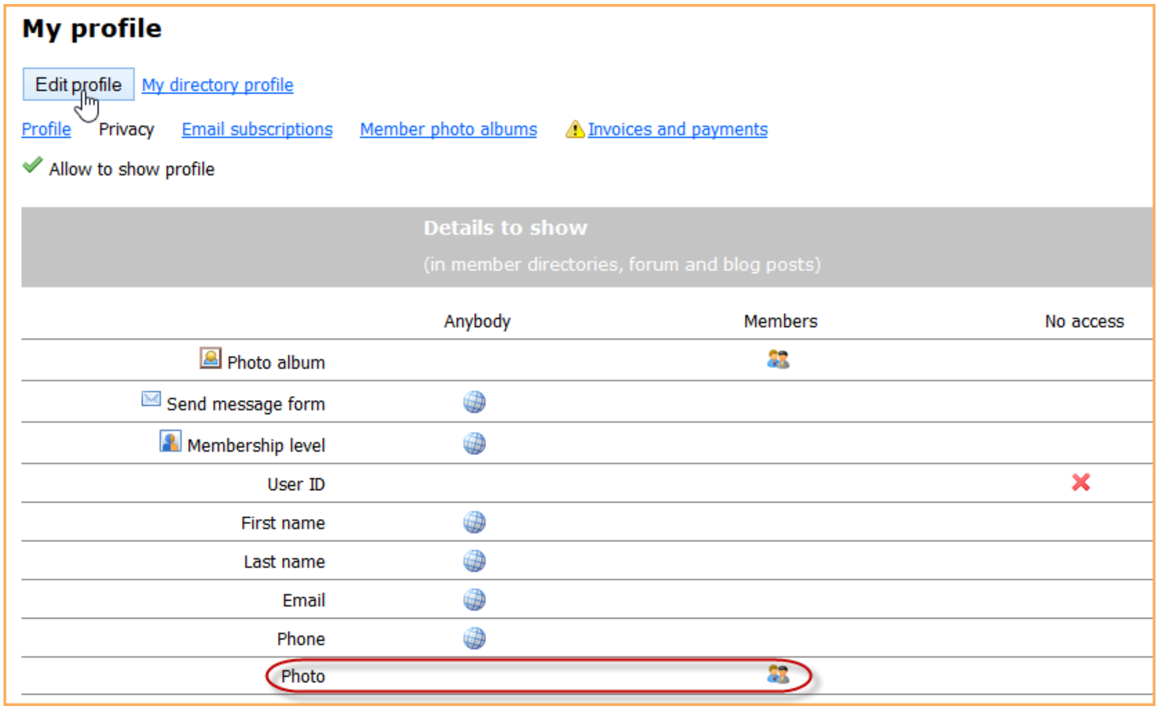
To set the privacy defaults for member pictures, an administrator hovers over the **Members** menu and selects the **Privacy** option. On the screen that appears, the administrator clicks the **Edit** button to enter edit mode.



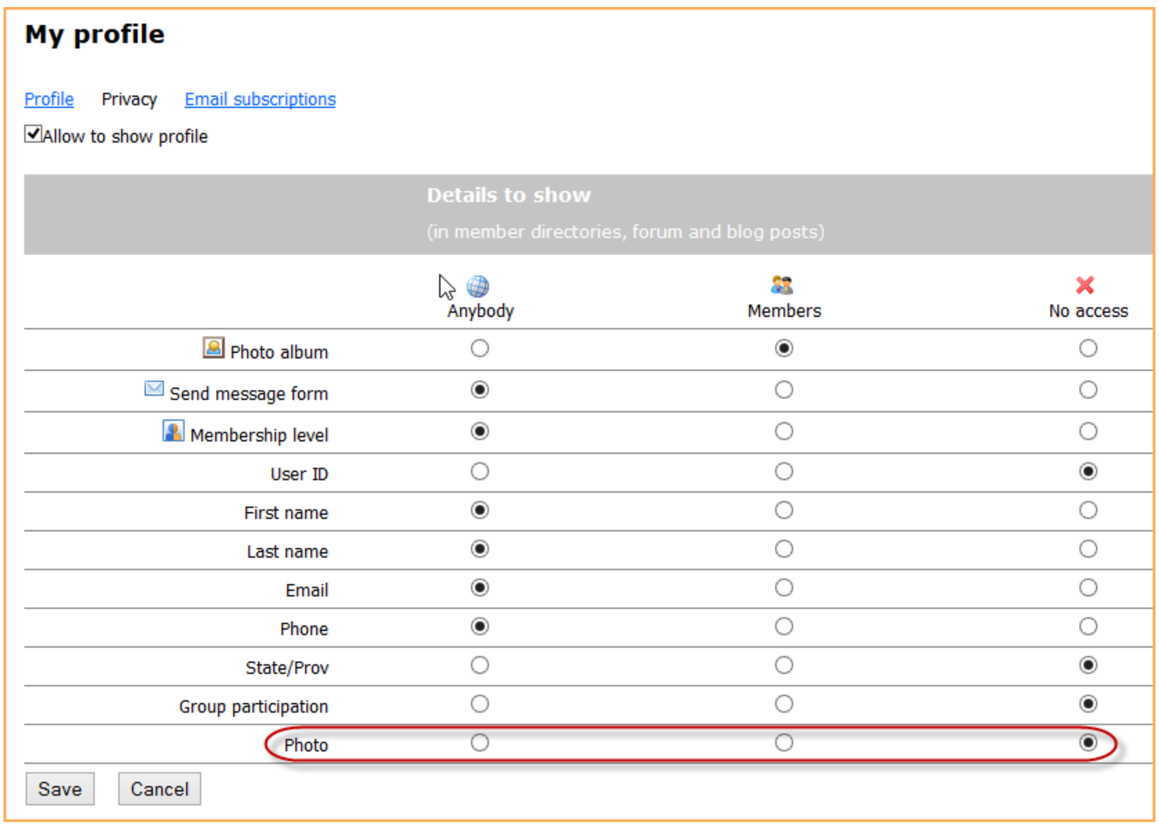
After clicking the **Edit** button, administrators can choose whether information stored in individual contact fields and membership fields will appear to the general public, to members only, or to no one other than administrators (and the member him or herself).



From the Privacy settings page of their member profile, members can click the **Edit profile** button to override the default privacy settings.



After clicking the **Edit profile** button, the member can choose for themselves who can view their pictures and other data.



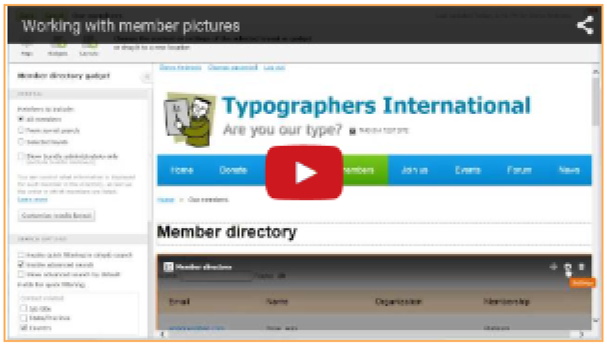
Troubleshooting

I've uploaded images but their thumbnails don't appear in the Insert picture window

The **Insert picture** window and **File management** screen can only display thumbnails for graphic images that use the RGB color model. If you upload an image that uses the CMYK color model (used for high quality printing), a placeholder thumbnail will be used in place of an actual thumbnail.

For more information on color models, click here.

For information on determining an image's color model, or to convert a picture to RGB format, see Determining and converting image color space.



Video: Working with member pictures (5:46
)

On this page:

- Adding picture fields
- Adding the picture
- Where pictures appear
- Privacy settings
- Troubleshooting

Expand all sections

See also:

- Member photo albums

Extra membership costs

Extra membership costs

As part of the membership application process – and optionally, the membership renewal process – you can offer optional extras, available at a separate cost in addition to the membership fee. For example, you could offer branded t-shirts or newsletter subscriptions.

You can also add extra charges that are calculated using a value entered by the applicant. For example, you could add an option to purchase a specific of t-shirts, or charge a variable membership surcharge based on organization size or income.

To provide optional extras at a separate cost as part of the membership application process, you add custom membership fields. The custom membership fields are combined with common fields from your contact database to form the membership record and populate the membership application form.

> If you are offering optional extras and want them to be available at renewal time, do not automatically generate the membership renewal invoice.

There are two types of extra cost fields: static fields which provide options that applicants simply choose, and calculated extra charge fields which display an input field whose value is used to calculate the actual charge.

> For bundle memberships, extra cost fields will only appear to the bundle administrator, not to individual bundle members.

Adding static extra cost fields

Static fields provide options that an applicant can choose or choose from, such as a t-shirt or a newsletter subscription.

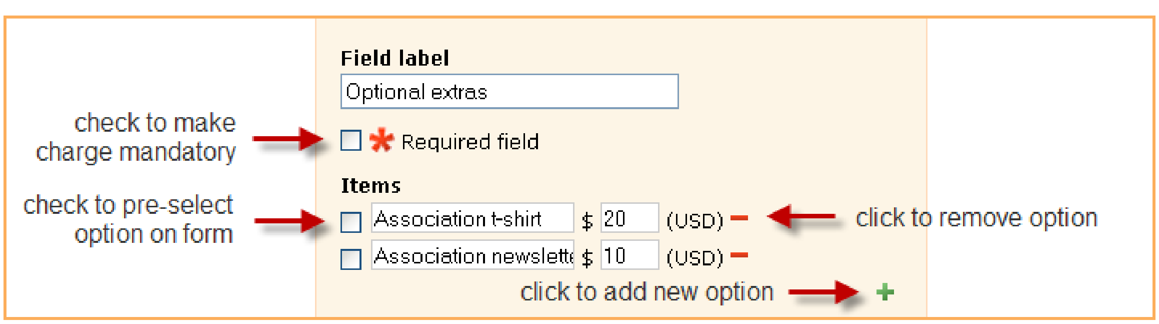
Read more/less

To add a static extra cost membership field, follow these steps:

1. Hover over the **Members** menu and click the **Membership fields** option.
2. Click the **Add new field** button.
3. Under **Type**, choose one of the following types for the new field.

Type	Description
Multiple choice with extra charge	A set of checkboxes, each with an associated cost. Choose this type if you want to allow the applicant to make multiple selections.
Radio buttons with extra charge	A set of mutually exclusive choices, arranged like buttons on a car radio, each with an associated cost. Choose this type if you want to allow the applicant to make a single choice from multiple options.

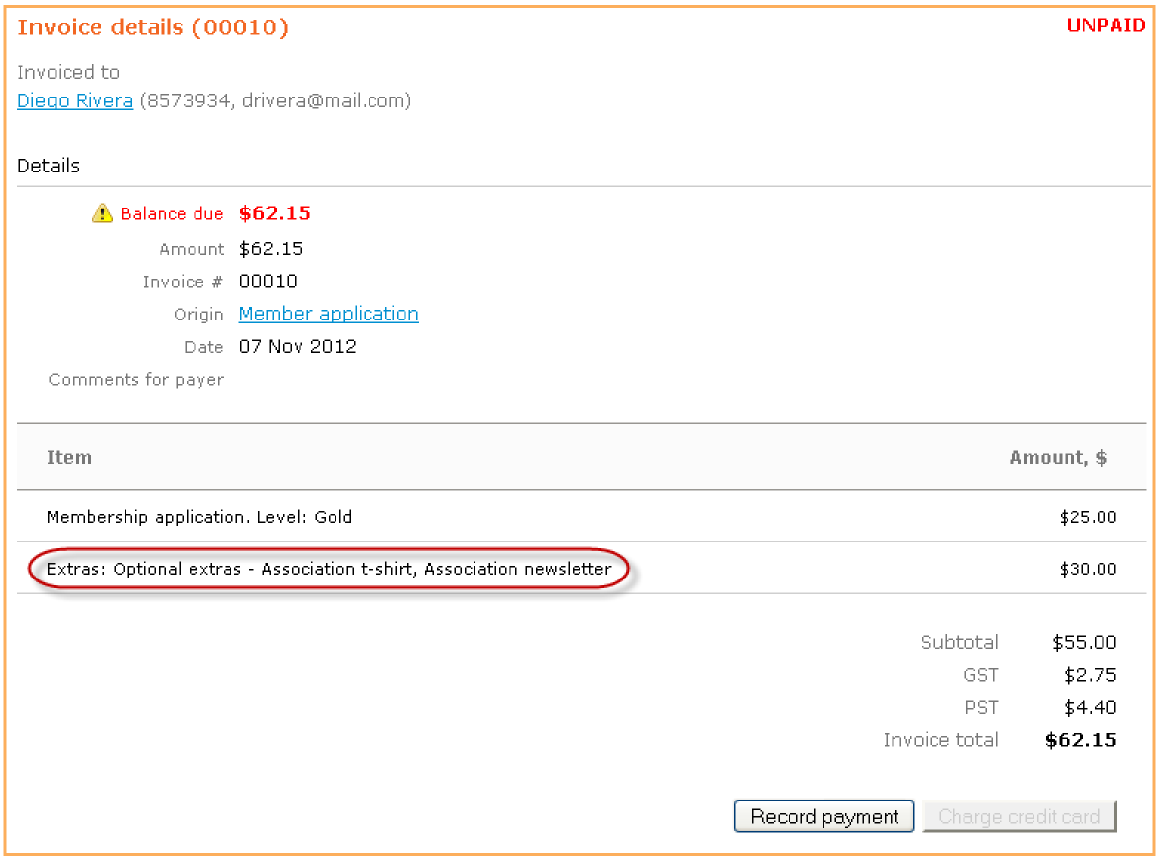
4. In the **Field label** box, enter a name for the field. The name will appear as the label for the field on the membership application form.
5. Check the **Required field** box if you want the charge to be mandatory. For example, you would check this for mandatory initiation fees.
6. Under **Items**, choose the options to be displayed for this field on the membership application form, and specify the costs of each. Click **Add new item** to add items to the list. Click the minus sign beside an existing option to change or remove it. If you want an option to appear already selected on the form – to be checked by default – click the checkbox beside the item.



7. Under **Applications**, indicate whether you want to include the field in new membership applications. If enabled, you can also control whether the cost should be prorated over a partial period of time. See Prorating membership dues for new applications fo r more information.
8. Under **Renewals**, indicate whether you want to include the field in membership renewals. If enabled, you can also control whether members can change their original selection when renewing.
9. Under **Use in**, choose whether the field applies to all membership levels or is restricted to one or more specific membership levels.
10. Enter **Field instructions** explaining how to use this field. For information on controlling the appearance of field instructions, see Adding field instructions.
11. Click **Save all changes**.

Within the membership application process, the options you have added will appear after the applicant has selected a membership level and provided an email address.

The selected extra costs items will appear as separate items on the membership invoice.



It is not recommended to make bulk changes to extra costs fields via import because invoices will not be updated. Instead, we suggest adjusting each record individually.

Adding calculated extra cost fields

You can add calculated extra cost fields that calculate an extra charge using a value entered by the applicant.

Read more/less

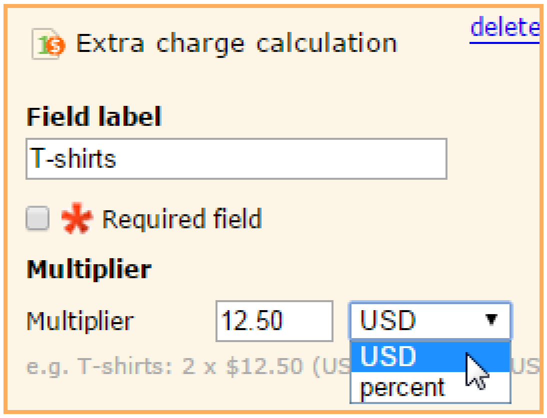
For example, you could add an option to purchase a specific of t-shirts, or charge a variable membership surcharge based on organization size or income.

To add a calculated extra cost membership field, follow these steps:

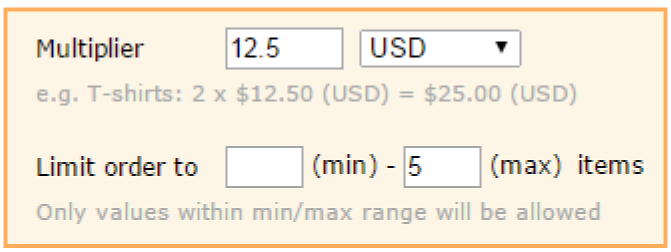
1. Hover over the **Members** menu and click the **Membership fields** option.
2. Click the **Add new field** button.
3. Under **Type**, choose **Extra charge calculation**.
4. In the **Field label** box, enter a name for the field. The name will appear as the label for the field on the membership application

form.

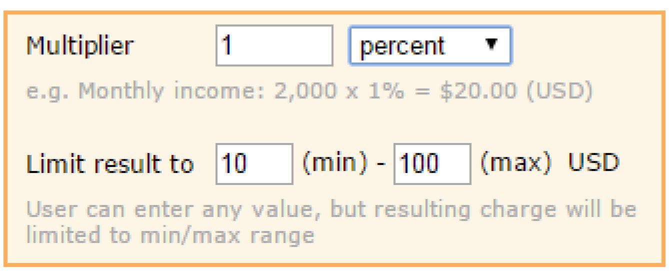
5. Check the **Required field** box if you want the charge to be mandatory. For example, you would check this for mandatory membership surcharges.
6. Under **Multiplier**, choose whether to specify a unit cost or a percentage to be applied to the entered value. To do so, click the dropdown that initially displays the currency you chose in your online payment settings, and choose the currency if you want to specify a unit cost, or **percent** if you want to apply a percentage to the entered value.



7. If you choose the currency, so you can specify a unit cost, you can also specify the minimum and maximum number of items you visitor can order.



If you are applying a percentage, you can specify a minimum and a maximum resulting value.



Values entered by the applicant or registrant that result in charge below the minimum or above the maximum will be automatically adjusted to fit within the limits.

8. Under **Applications**, indicate whether you want to include the field in new membership applications. If enabled, you can also control whether the cost should be prorated over a partial period of time. See Prorating membership dues for new applications fo r more information.
9. Under **Renewals**, indicate whether you want to include the field in membership renewals. If enabled, you can also control whether members can change their original selection when renewing.
10. Under **Use in**, choose whether the field applies to all membership levels or is restricted to one or more specific membership levels.
11. Enter **Field instructions** explaining how to use this field. For information on controlling the appearance of field instructions, see Adding field instructions.
12. Click **Save all changes**.

Usage examples

Below are a few scenarios in which extra cost fields can be used with different settings for different purposes.

Read more/less

Scenario	Extra cost field type	Required field?	Include in new applications?	Include in renewals?
One-time initiation/setup fee	Multiple choice with single option	Yes	Yes	No
Fee within membership level based on company size	Extra charge calculation	Yes	Yes	Yes
Branded merchandise for new members only	Multiple choice or extra charge calculation	No	Yes	No
Discounted merchandise as renewal reward	Multiple choice or extra charge calculation	No	No	Yes

Recurring payments

If you're using not using PayPal

If you have recurring payments enabled and you're **not** using PayPal to process payments, any extra charges will be included in subsequent payments only if you enabled the **Include in renewals** option for the extra charge field.

If you're using PayPal

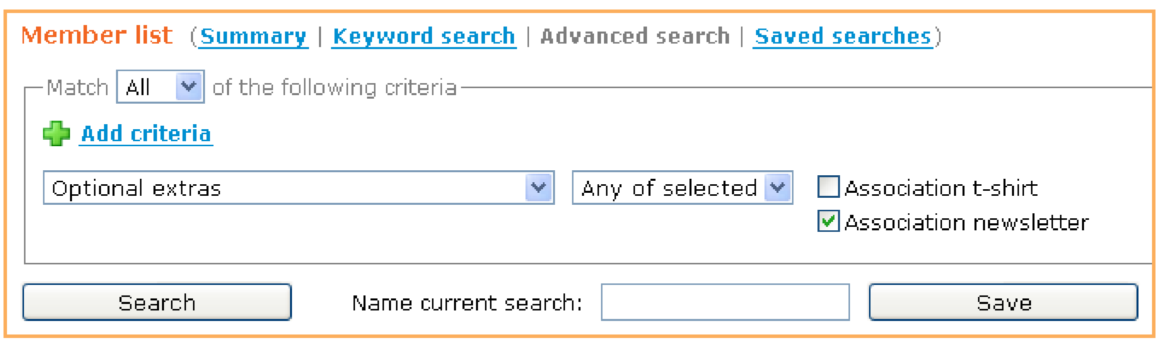
If you have recurring payments enabled and you're using PayPal, extra charges applied during the initial transaction will also be included in each subsequent payment **even** if you disable the **Include in renewals** option. If you do disable this option, the invoice amount for the recurring membership renewal will be different from the payment amount, resulting in an overpaid balance that will increase with each additional payment.

Viewing extra cost selections

You can see who has ordered or selected extra cost items by performing an advanced search on the Members tab.

Read more/less

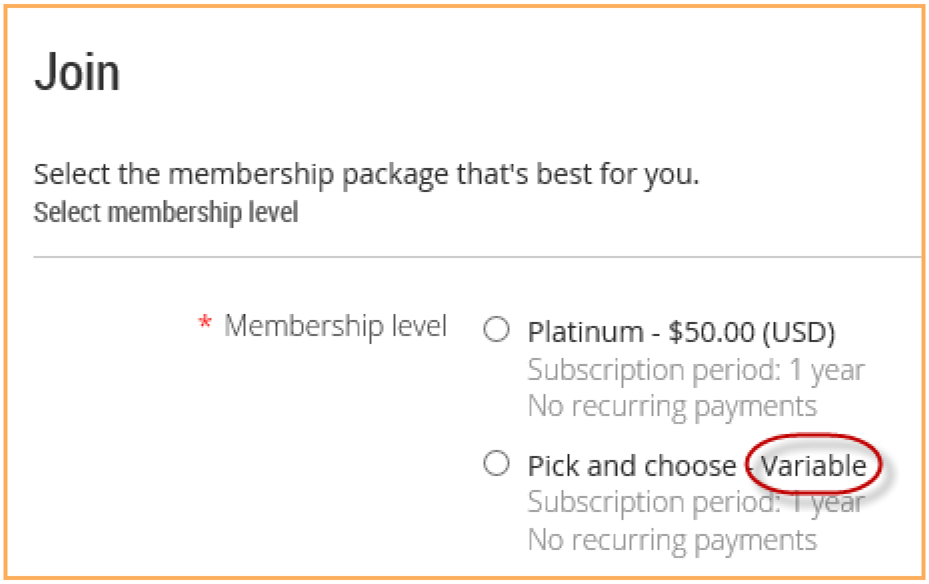
Select the extra cost field from the criteria drop-down then check the option(s) you are interested in. Click **Search** to list all the members who have chosen the option(s).



Removing the Variable and Free labels

If you use extra membership costs in place of a membership fee – setting the membership fee to zero – your membership level will labelled as *Variable* in the level list and as *Free* on subsequent screens.

Read more/less



To remove the *Variable* and *Free* labels for **all** free membership levels, follow these steps:

1. Go to **Settings** then click **Global JavaScript** (under **Site settings**).
2. On the **Global JavaScript** screen that appears, copy and paste the following code:

```
<script type="text/javascript">
$('.levelPrice').each(function(){
    if($(this).is(":contains('- Variable')") || $(this).is(":contains('-
Free')")){
        $(this).hide();
    }
});
</script>
```

3. Click **Save**.

On this page:

- Adding static extra cost fields
- Adding calculated extra cost fields
- Usage examples
- Recurring payments
- Viewing extra cost selections
- Removing the Variable and Free labels

Expand all sections

Online self-service

Online self-service

For information on member and contact self-service, see one of the following help topics or search within this section.

- Member and contact - edit profile
- Member and contact - email settings
- Member photo albums
- Member - renew or change level
- View account history and pay invoices
- Paying once for multiple transactions

Member and contact - edit profile

Profile updates for members and contacts

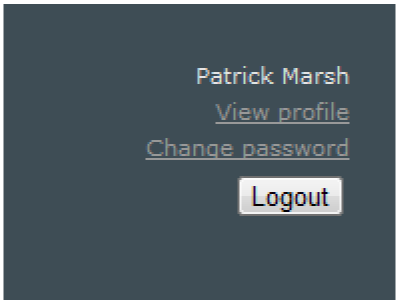
Wild Apricot sites have numerous self-service options for members and contacts. Most of these options are available from their member or contact profile.

Accessing the profile

Members and contacts can access their profile by logging in to their Wild Apricot site.

Read more/less

Once logged in, a **View profile** link will appear, or – depending on your website theme – the contact's name may appear as the link. Clicking this link will take them to their profile page.



You can embed a Wild Apricot member profile login box into another website using widgets.

Common profile functions

Viewing and editing the profile

After clicking the **View profile** link, the user will see their key profile information.

Read more/less

The following example shows the profile of a member:

My profile

Edit profile My directory profile

Profile Privacy Email subscriptions Member photo albums Invoices and payments

	Membership details
Membership level	**Silver Membership** - $100.00 (USD) Subscription period: Monthly Automatic renewal (recurring payments) — Change membership level
Membership status	**Active**
Member since	23 Nov 2011
Renewal due on	23 Dec 2011 — Renew until 23 Jan 2012
Member ID	1041268
First name	Patrick
Last name	Marsh
Organization	PM Enterprises Inc.
e-Mail	patrick@patrickmarsh.com
Phone	
Sponsor type	✓ Initiating sponsor ✓ Primary sponsor
	Personal information
Your Photo	
Job title	Business management consultant
Website	
	Contact data
Address	603 Wilson Street
City	Carlsbad
Postal code	
Province/State	CA
Country	United States
	Member public profile
About me	I am a business management consultant at PM Enterprises Inc.

To update their profile, they can click the **Edit profile** button.

To save the changes, they can click the **Save** button.

You can customize this page by modifying the **Contact profile** system page.

Email subscriptions

The **Email subscriptions** page allows them to adjust their email preferences. For more information, see Member - emails settings.

Invoices and payments

Following the **Invoices and payments** link allows members to view their history of invoices and payments, and pay open invoices. For more information, see Paying invoices.

Additional profile settings for members

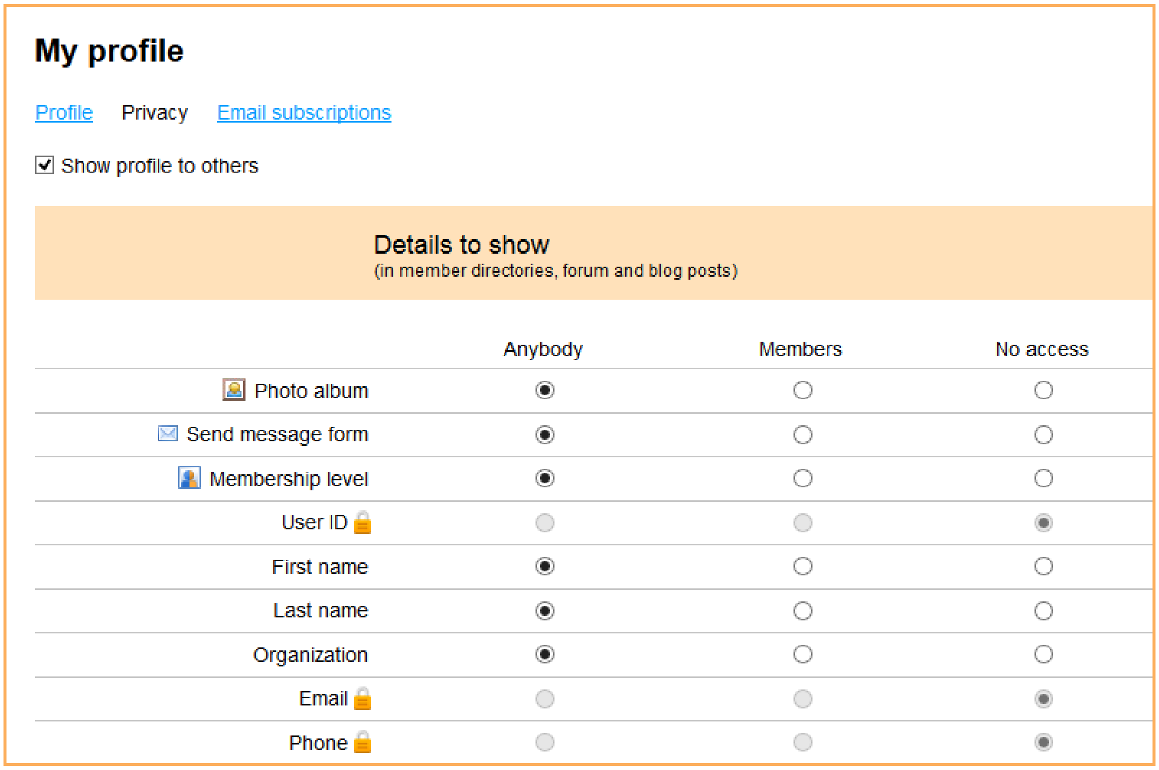
Privacy

The **Privacy** link allows a member to specify which fields are visible to everyone, other members, or hidden from everyone else.

Read more/less

These settings apply to their listing in the member directory and on their directory profile page.

If a lock icon appears beside a field, the member cannot change the privacy setting for that field. For information on locking privacy settings, see Member privacy settings.



A member can hide their public profile altogether by unchecking the **Allow to show profile** option.

Click the **Save** button to save settings, or **Cancel** to exit without saving.

My directory profile

Click on **My directory profile** to preview how your profile is displayed to others based on your privacy settings.

Read more/less

Administrators can customize the appearance of public profile pages by modifying the **Member public profile** system page.

Photo albums

Clicking the **Member photo albums** link allows a member to manage their photo albums. For more information, see Upload and manage member photo albums.

On this page:

Expand all sections

See also:

Member and contact - email settings

Member and contact email settings

Not everyone may want to receive all possible emails from your organization. Wild Apricot allows each contact to opt out of receiving some types of emails, while continuing to receive others. For example, a contact can choose not to receive event announcements and still receive all other emails.

Contacts can also opt out of receiving any kinds of emails from your organization. They will still receive confirmation emails in response to specific actions on their part, such as membership renewal notices or event registration confirmations, but they will not receive event announcements and other email blasts.

Each contact record in Wild Apricot includes email subscription settings. Both the contact and administrators can change these settings. For instructions on how contacts can manage their own email settings, see below. For details on how administrators can manage email subscriptions, see Contact email settings and log.

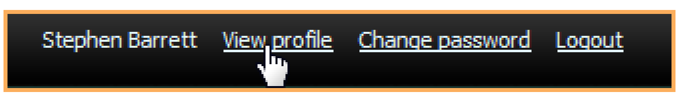
> These email settings do not affect confirmation emails such as membership renewal reminders and invoices/receipts. Only administrators can disable those emails (see Contact email settings and log).

Updating email settings

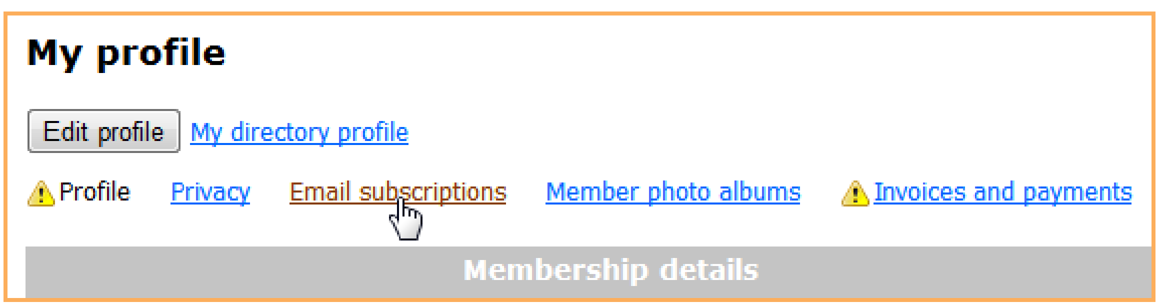
To update email settings, a member follow these steps:

Read more/less

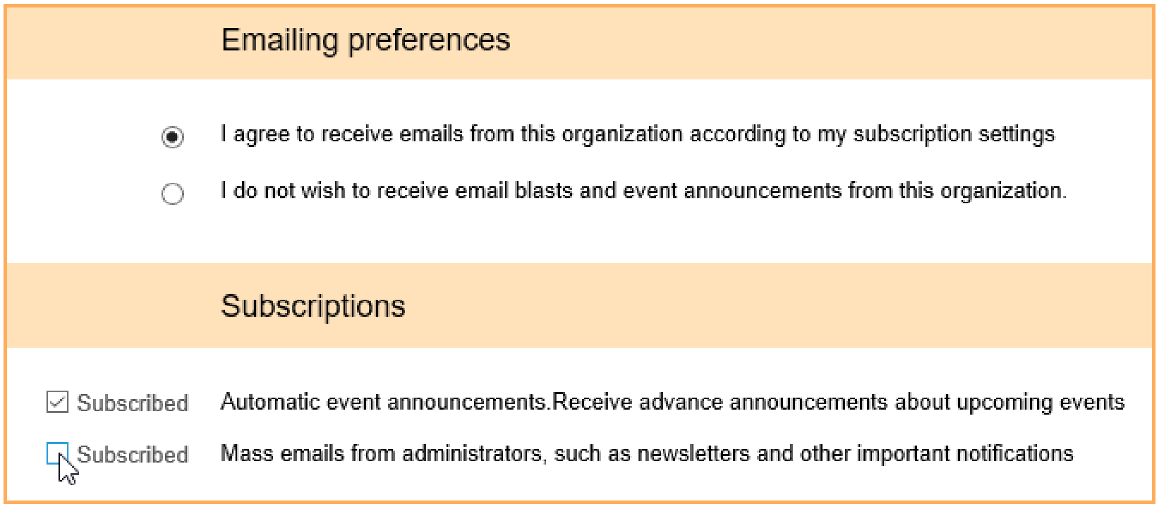
1. Logs into your Wild Apricot site.
2. Clicks the **View profile** link or – depending on the website theme – their name to jump to their member profile page.



3. Clicks the **Email subscriptions** link.



4. Clicks the **Edit profile** button.
5. The contact can now indicate whether they consent to receive emails from your organization. If the contact agrees to receive emails from your organization, they can now choose the type of message they want to receive. They can separately choose whether to receive event announcements and manual email blasts.



If the contact indicates that they do not wish to receive emails from your organization, they will still receive confirmation emails in response to specific actions on their part, such as membership renewal notices or event registration confirmations, but they will not receive event announcements and other email blasts.

6. The contact can also enable or disable forum update emails, and change the frequency of the emails by selecting an option from the drop-down list. Forum subscription options only appear if the contact has subscribed to forum update emails from a forum page.
7. After you have made your choices, click **Save**.

By default, every new contact will have event notifications and email blasts turned on.

> Subscribed means you receive those emails, and removing the check mark will unsubscribe you.

Using the Unsubscribe link in emails

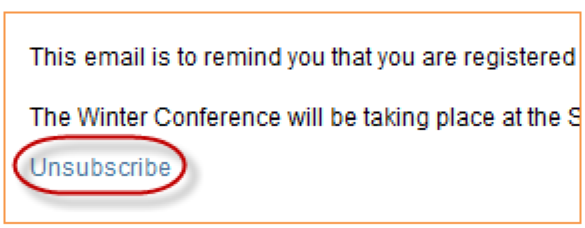
Certain emails sent from your site will always include an **Unsubscribe** link in the email.

Read more/less

An unsubscribe link will be automatically added to the following emails if they do not already include the {Unsubscribe_Url} macro:

- Manual email blasts (see Sending email blasts)
- Event announcements and reminders (see Event emails)
- Forum subscriptions (see Setting up and using discussion forums)

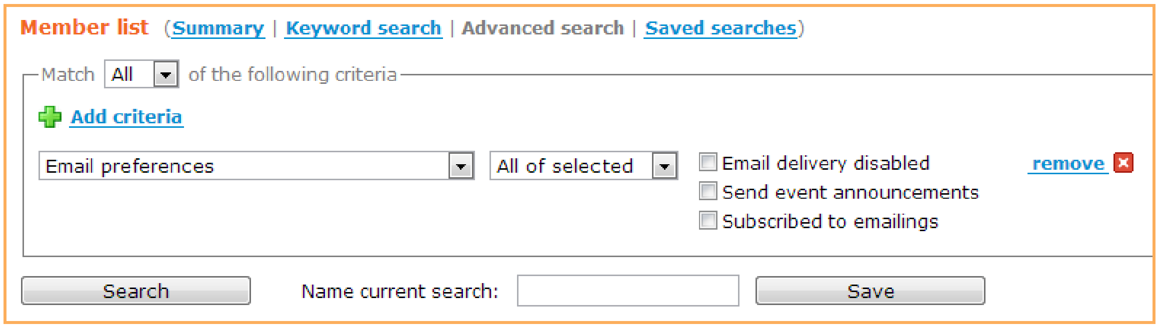
When opening these emails, the recipient should see the unsubscribe link at the bottom of the email:



Clicking the unsubscribe link will redirect the user to a page on your site where they can unsubscribe:

The **Unsubscribe** link will only unsubscribe you from one specific set of emails, not from all types of emails. For example, if you unsubscribe from a manual email (like a newsletter) then you will stop receiving all manual emails, but you will continue to receive event announcements.To unsubscribe from both types of emails you need to unsubscribe from each email type separately, or login and edit your email subscriptions as shown above.

Unsubscribing will update a contact's email settings. To search for members or contacts who have unsubscribed from different types of mailings, go to the **Advanced search** tab and select **Email preferences** as your search criteria. You can then choose to search for those who have unsubscribed from automatic event emails (**Send event announcements** is disabled) or from all manual emails (**Subscribed to emailings** is disabled).



On this page:

- Updating email settings
- Using the Unsubscribe link in emails

Expand all sections

See also:

- Email subscription form
- Setting up and using discussion forums
- Contact email settings and log
- Controlling the delivery of automatic emails

Member photo albums

Member photo albums

Member photo albums are collections of photos that can appear on a member's profile. Member photo albums are different from the photo album pages that can be added to a Wild Apricot site.

Members can create multiple photo albums and upload photos to their albums. Members can add descriptions to their albums and captions to their photos.

There is a limit of 50 photos for each member photo album. Photos added to member photo albums do **not** count towards your overall file storage limit.

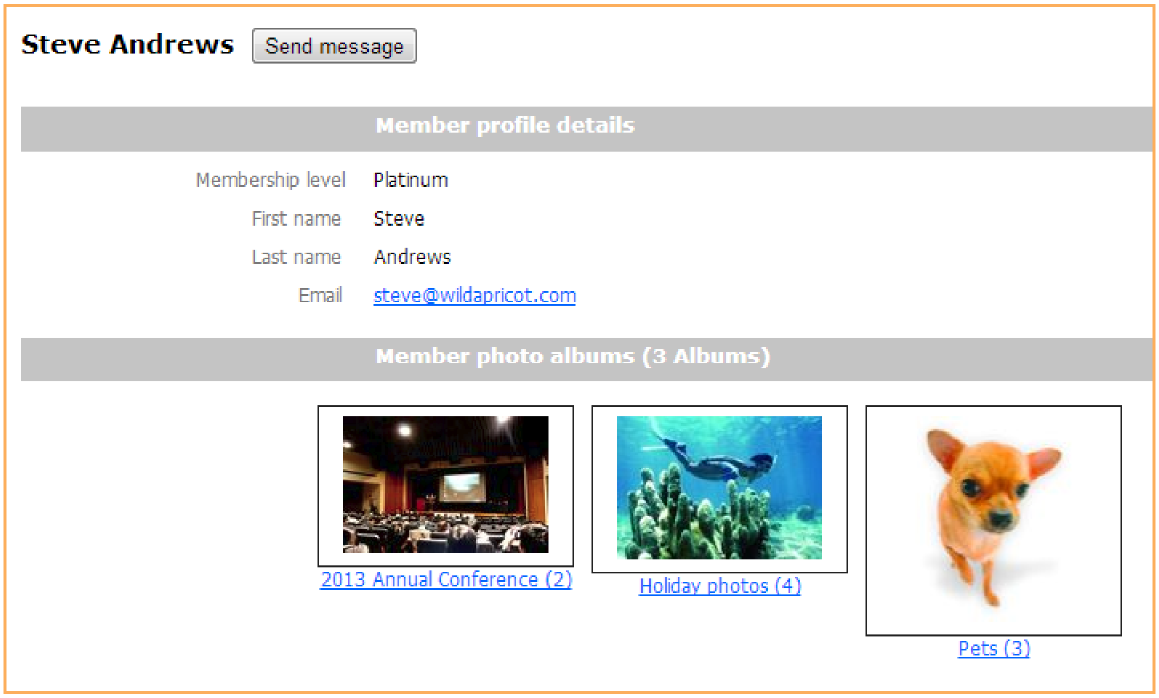
Administrators can control how many albums a member can add to their profile. Both administrators and members can control whether other members and non-members can view their photo albums.

Viewing member photo albums

Those who have been granted access to member photo albums can view them by clicking a member's name within a member directory page.

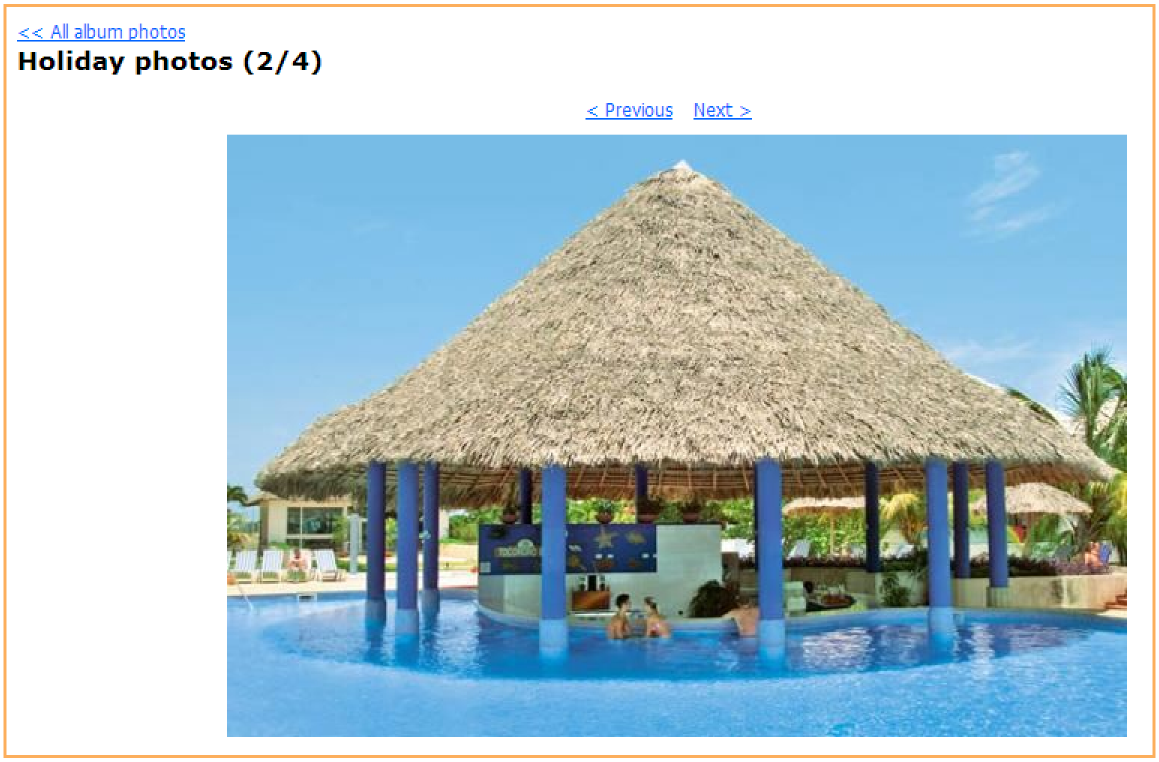
Read more/less

On the member's profile, the photo albums will be displayed, using one photo from each album as the album cover.



To view a photo album, the visitor clicks the album cover. Thumbnails will be displayed for each photo in the album.

To view a larger version of a photo, click the thumbnail within the photo album page. On the individual photo page, the photo will be displayed as close to full size as can fit on the page.



To view the full version of the photo in a separate browser tab, click the photo within the photo page. To scroll through other images in the album, click the **Previous** or **Next** links.

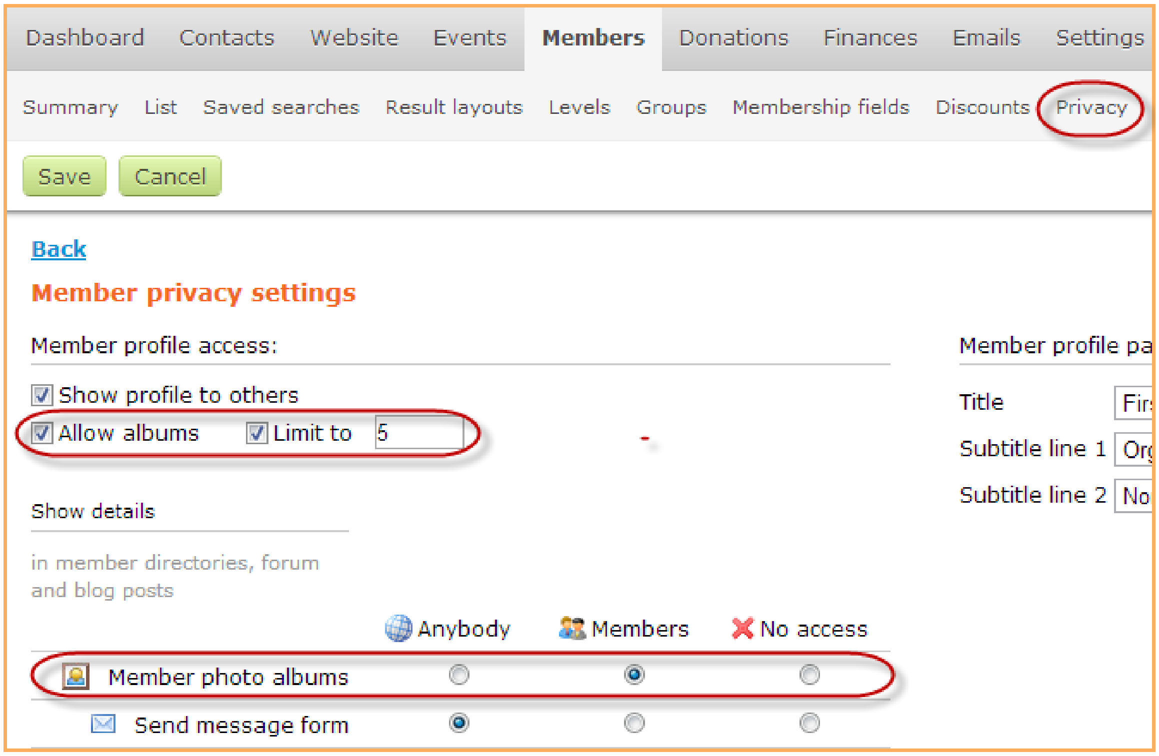
Enabling and configuring member photo albums

To enable and configure member photo albums, follow these steps:

Read more/less

1. Hover over the **Members** menu and select the **Privacy** option.
2. On the **Member privacy settings** screen that appears, click the **Edit** button.
3. Check the **Allow albums** checkbox.
4. If you want to limit the number of albums that members can create, check the **Limit to** checkbox and enter the maximum number of albums.
5. In the **Show details** area, click the appropriate radio button on the **Member photo albums** row to control who can view member photo albums. You can allow anybody to view member photos albums, just members, or allow viewing by no one other than the

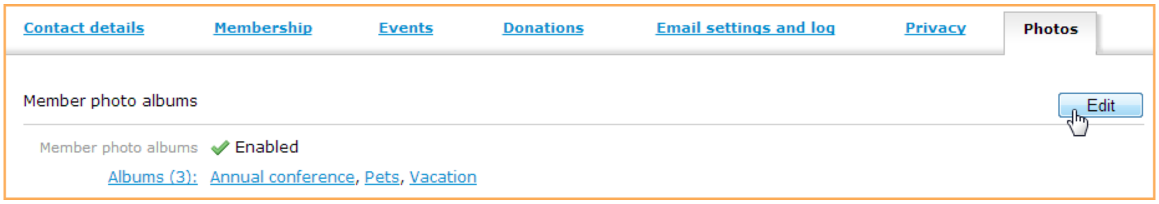
member who created them.



6. When you finished adjusting member privacy settings, click **Save**.

If you have changed the access settings for member photo albums, you will be prompted to choose whether to apply your changes to future members only, or to all existing members as well.

After enabling photo albums for all members, administrators can disable them for individual members from the Photos page of their contact record.



Administrators can adjust access settings for individual members from the contact record's Privacy tab. Members can also adjust access settings from the Privacy tab on their member profile.

> If access to member photo albums is set to no one, administrators can still view – but not delete – member photo albums from the **Photos** page of the member's contact record.

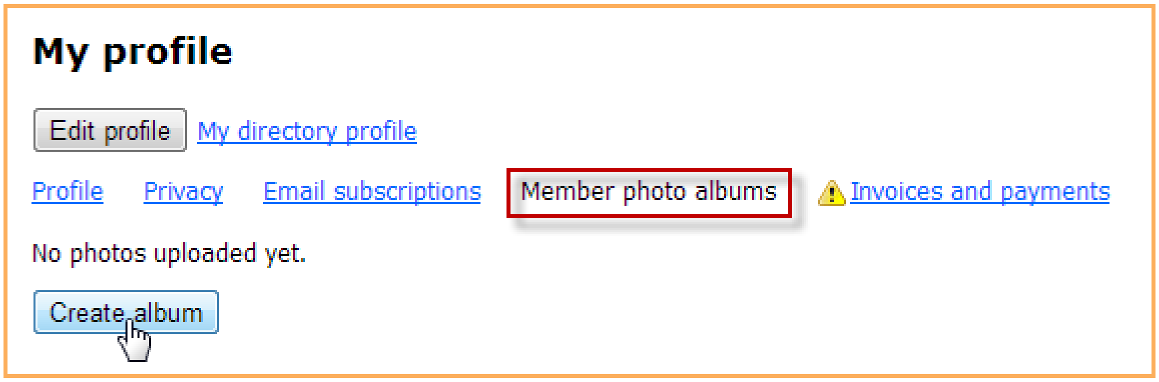
Once photo albums are enabled, members can then create albums on their profile and upload images to them.

Managing member photo albums

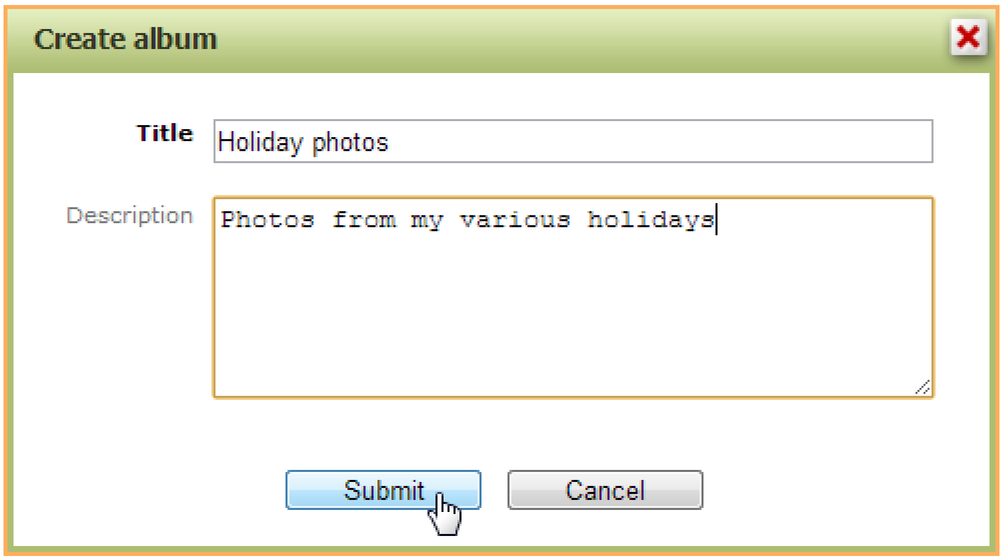
From their member profile, members can add and delete photo albums, and change the name and description of each album.

Read more/less

To add a photo album to their profile, a member goes to the **Member photo albums** page then clicks the **Create album** button, if they don't have any albums yet, or the **Add album** button if they do.

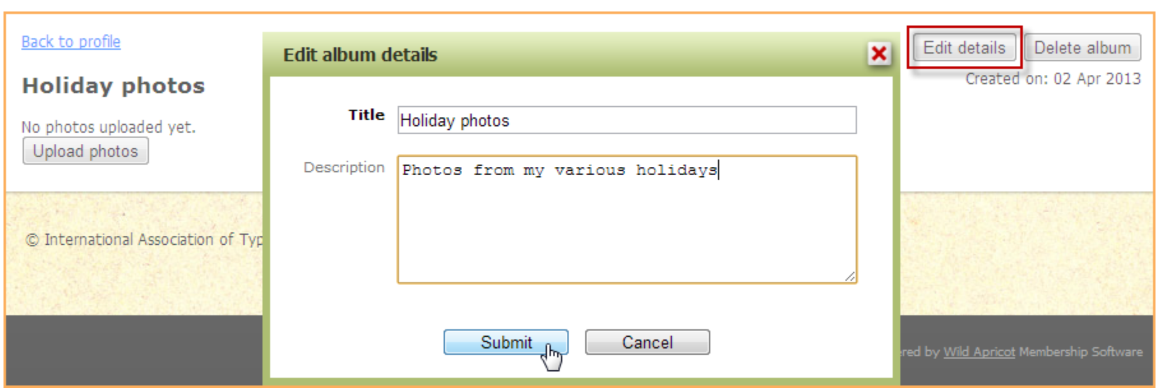


On the dialog that appears, the member enters a title and description for the album then clicks **Submit**.



The album title cannot end with a period.

With the album now created, the member can change the title and description by clicking the **Edit details** button or delete the album by clicking the **Delete album** button.

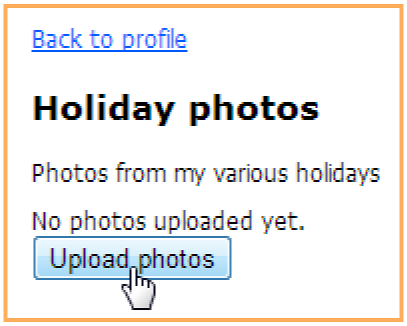


Adding photos to member photo albums

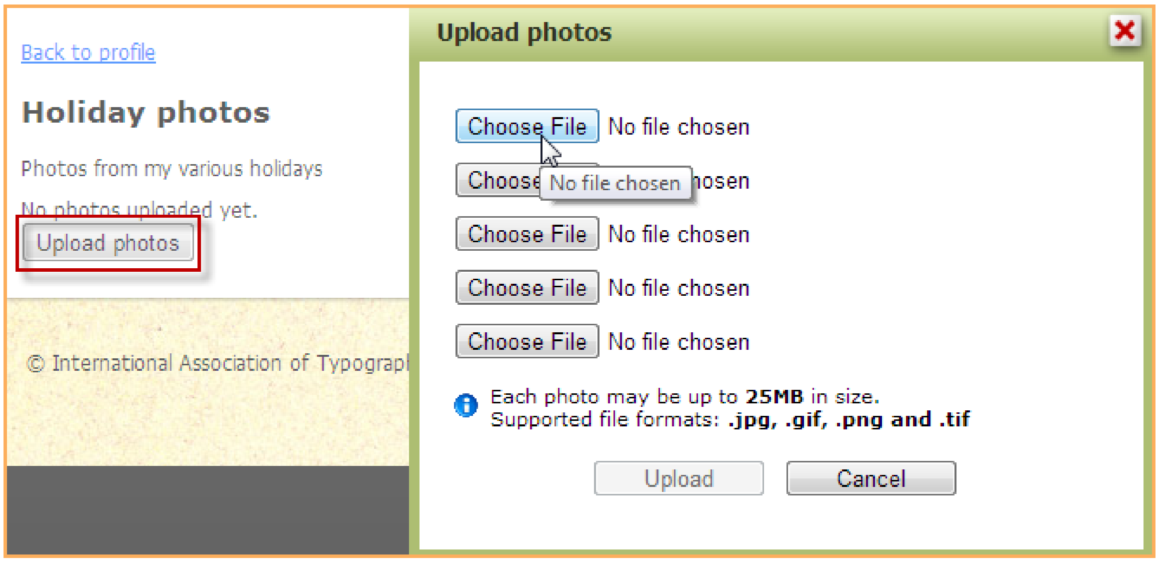
A member with a status of *Pending - New* cannot add photos to their member photo album.

To upload a photo to an album, the member opens the album (if it isn't open already) then clicks the **Upload photos** button.

Read more/less



On the dialog that appears, the member can select up to 5 images to be uploaded at a time.



Members can select photos saved using the following file formats: .jpg, .gif, .png and .tif. The maximum file size of each photo will depend on your billing plan.

After selecting the files to be uploaded, the member clicks the **Upload** button.

The selected photos will be uploaded and added to the photo album.

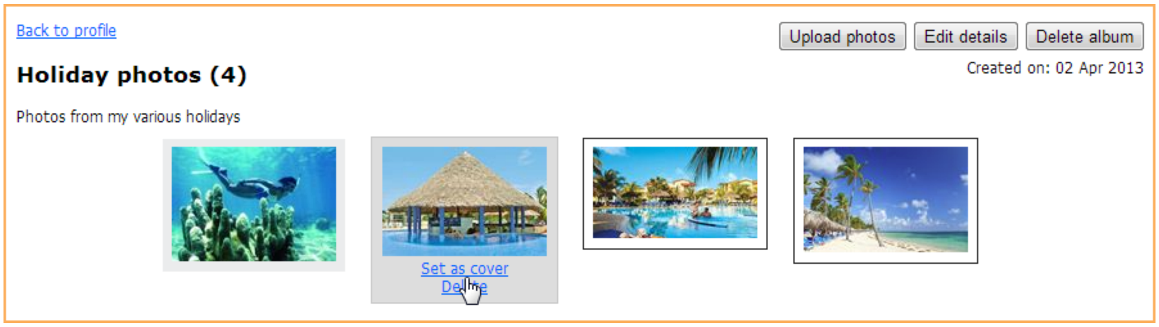
Managing photos

After adding photos to a photo album, members can set a photo as the album cover, assign a caption to the photo, or delete photos.

Setting a photo as the album cover

To set a photo as the album cover – so that the photo is used as the thumbnail for the album – hover over the photo within the album then click the **Set as cover** link.

Read more/less



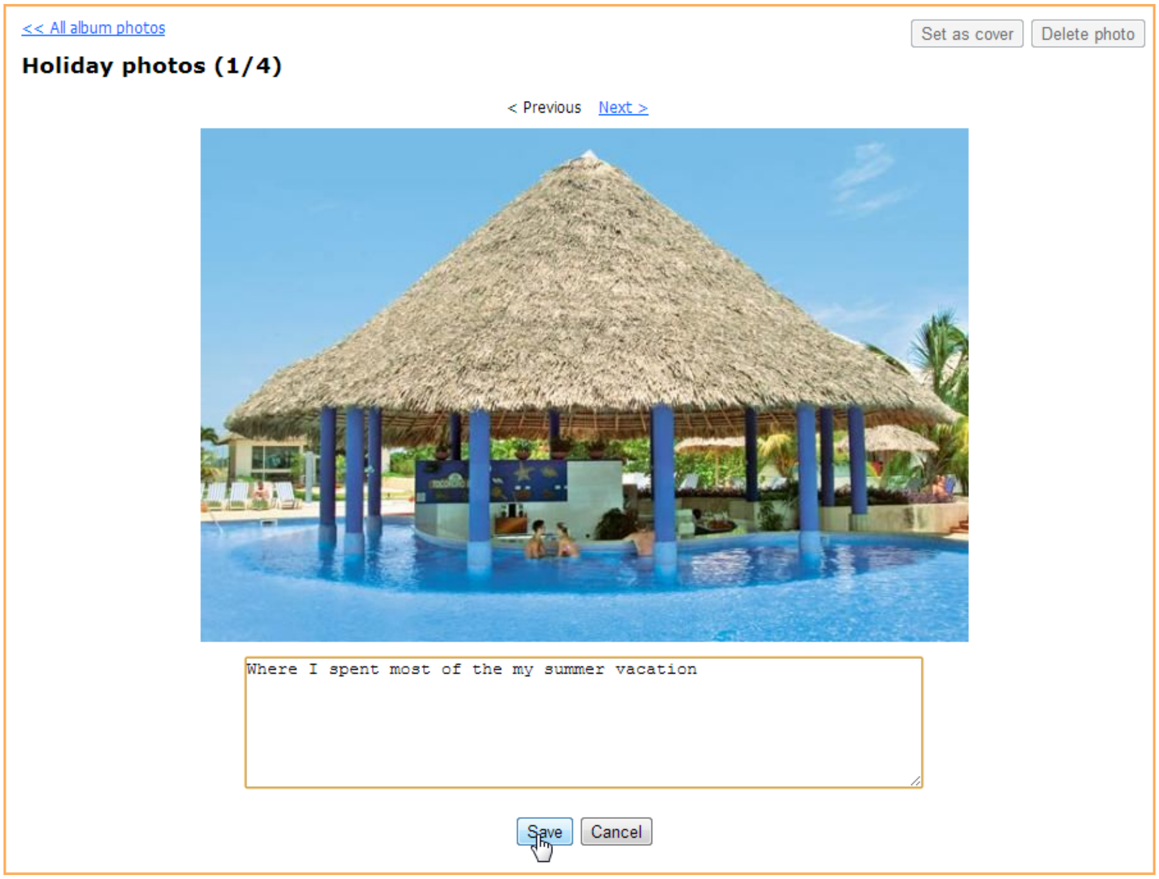
The photo will now appear as the first photo within the album, and as the album cover on the **Member photo albums** page.

Assigning a photo caption

To assign a caption to a photo, click the photo within the photo album, then click the **Add caption** link that appears below the photo.

Read more/less

In the field that appears, enter the caption then click **Save**.

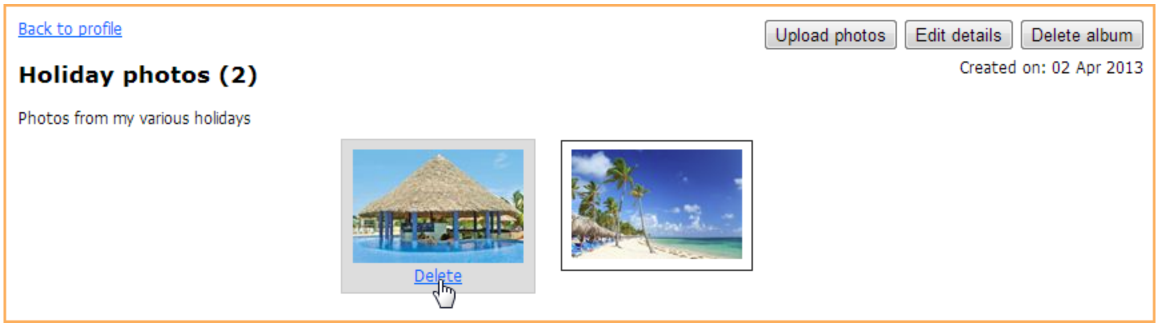


The caption will appear below the photo thumbnail within the album and on the individual photo page.

Deleting photos

To a delete a photo, hover over its thumbnail within the photo album page then click the **Delete** link that appears.

Read more/less



You can also delete a photo from the individual photo page by clicking the **Delete photo** button that appears in the upper right corner.

On this page:

Expand all sections

See also:

- Photo albums
- Member privacy settings

Member - renew or change level

Member renewals and level changes

Wild Apricot includes many online self-service features for members, including the ability for members to renew their membership, change their membership level, and pay membership dues online.

For each membership level, you can provide for a membership renewal invoice to be automatically generated and emailed in advance of the renewal date.

Renewing a membership

Members can renew their membership from the membership renewal notice they received by email, or from your Wild Apricot site.

Renewing via email

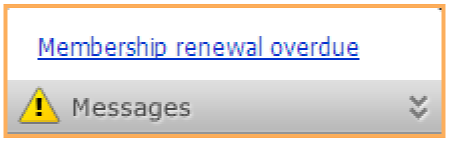
Depending on how you have set up the membership level, you can provide for a membership renewal notice and invoice to be automatically emailed to the member. If the member clicks the **View invoice online** link within the emailed invoice, they will be able to view and pay the invoice online without logging in. This option is not available for levels with automatic recurring payments.

Renewing from your Wild Apricot site

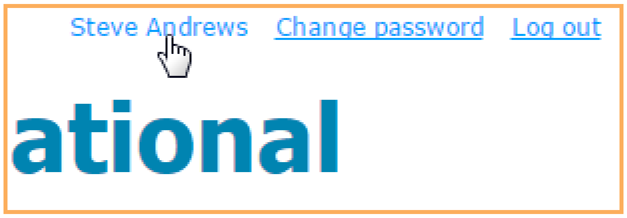
To renew a membership or change their membership level from your Wild Apricot site, members must log in.

Read more/less

After a member logs in, a message will appear in the bottom right corner if the member has unpaid invoices or incomplete registrations, or if the member is lapsed, overdue, or within a week of their renewal date.



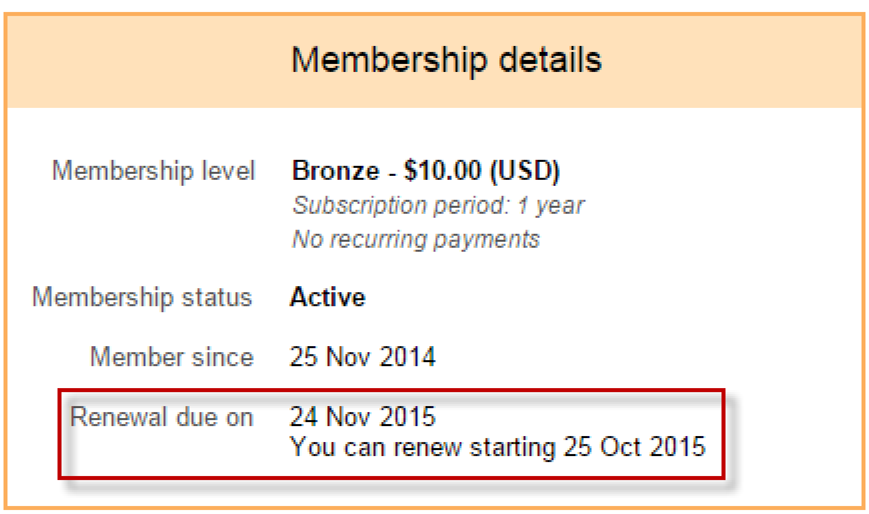
To renew or upgrade their membership, a member clicks the **View profile** link to jump to their member profile page. Depending on the website theme, their name may appear as the link.



From their member profiles, members can perform a variety of self-service functions, including membership renewal.

> ⓘ You can customize this page by modifying the **Contact profile** system page.

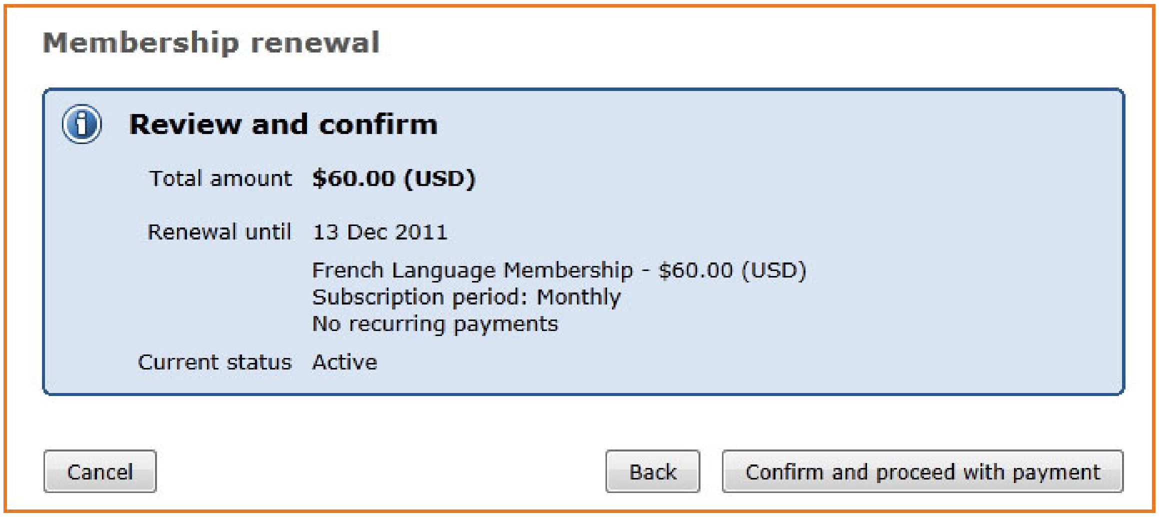
To renew their membership, the member clicks the **Renew** button from their **Profile** page. When a member is limited to renewing only one period ahead or only within a certain number of days or months before the membership expires, a notice informing the member of the next possible renewal date will appear in place of the **Renew** button.



The **Renew** button does not appear if the member's status is *Pending - Renewal*. This status means that a renewal invoice has been automatically generated by the system or manually generated by the administrator, or that the member has already started the renewal but has not completed the payment.

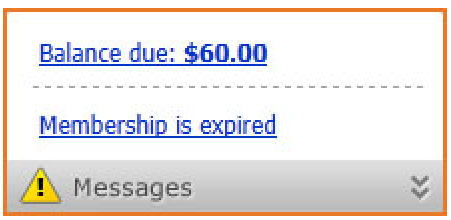
After clicking the **Renew** button, they will be given the opportunity to review and update their membership details. If a discount coupon was enabled for membership renewals and the current membership level, a field will appear where the member can enter the coupon code.

After clicking **Update and next** and confirming the renewal, members will be taken to their **Invoices and payments** page where they can pay for the invoice (see View account history and pay invoices).

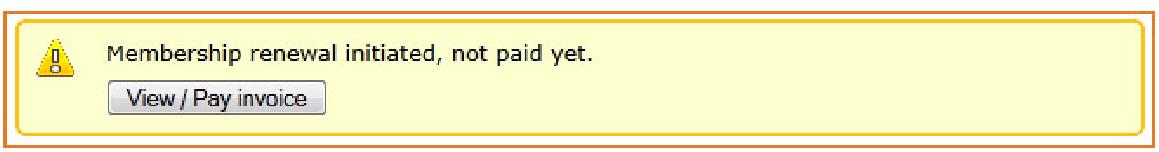


You can customize this page by modifying the **Membership renewal** system page.

Until the payment is made, a *Balance due* notification will be shown on the notification bar,



and a message will be displayed on the member profile:

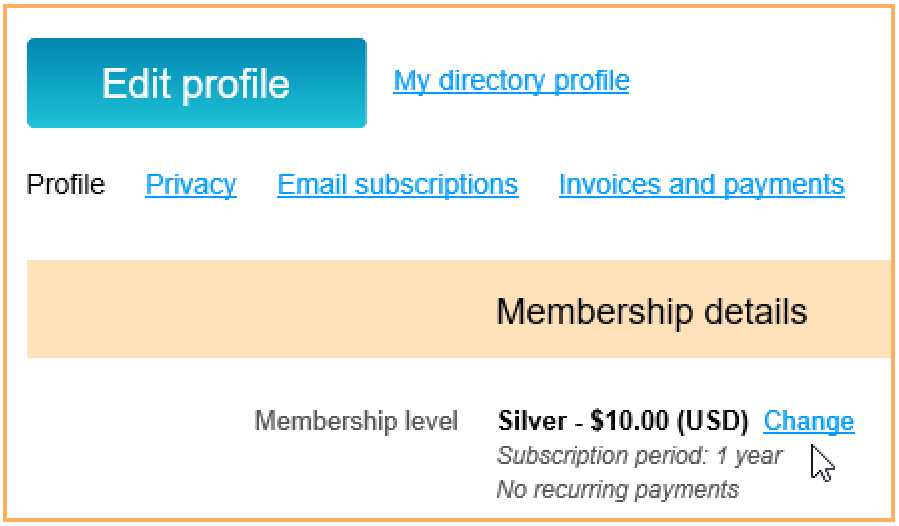


Renewals can also be processed automatically if automatic Recurring payments are enabled.

Changing membership level

If a member's current membership level allows level changes, an option will appear within their member profile to change their membership level.

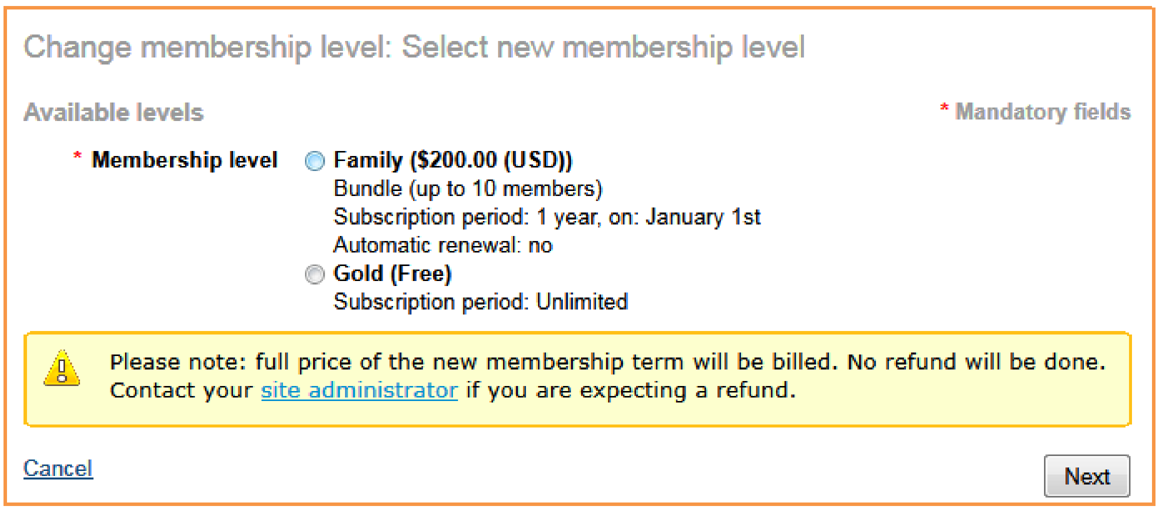
Read more/less



The option is not available if the membership status is pending.

> When a member changes their membership level, the full price of the new membership term will be billed, and the next renewal date will be calculated based on new level settings and payment date. There is currently no pro-rating based on the previous membership level.

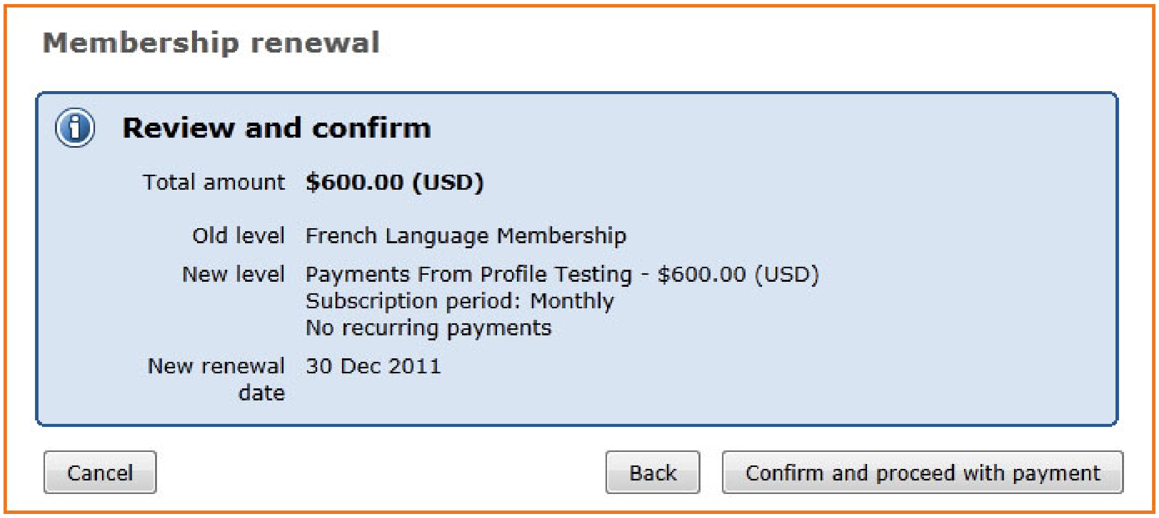
After clicking the **Change membership level** button, members will be presented with the list of available membership levels.



> You can customize this page by modifying the **Membership level change** system page.

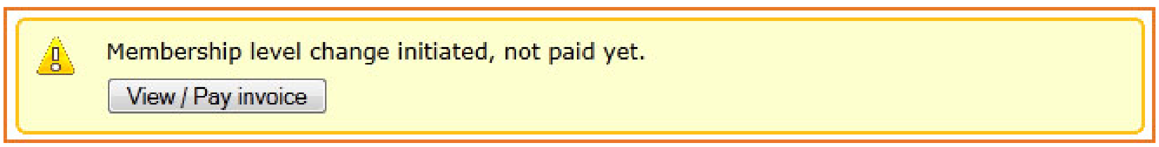
Next, they are given the chance to update their profile. If a discount coupon was enabled for member level changes and the selected membership level, a field will appear where the member can enter the coupon code.

After clicking **Update and next**, the member is asked to confirm the level changes.



You can customize this page by modifying the **Membership renewal** system page.

Members click on **Confirm** to add the invoice to their profile (see View account history and pay invoices). After the successful online payment, the membership record will be updated with a new membership level and renewal date. Until the payment is received, notice about the level change is shown on the member's profile, along with the option to view and pay the invoice.



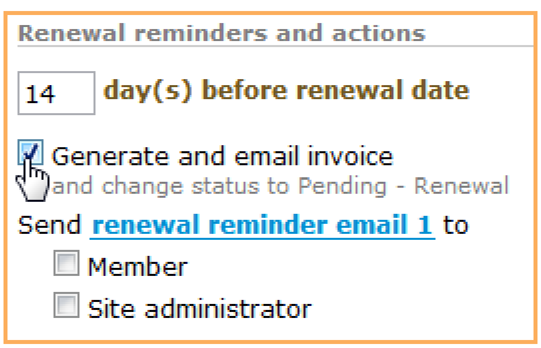
Automatically generating membership renewal invoices

For each membership level, you can provide for a membership renewal invoice to be automatically generated and emailed to members a specific number of days before their renewal date.

Read more/less

To enable automatic generation of renewal invoices:

1. Hover over the **Members** menu and select the **Levels** option.
2. Select the level for which you want automatic generation of renewal notices.
3. Click **Renewal policy**.
4. Under **Renewal reminders and actions**, enter the number of days in advance of the renewal date to email the invoice.
5. Check the **Generate and email invoice** option.



6. Click **Save**.

The membership renewal notice will be automatically generated and emailed to active members the specified number of days in advance of their renewal date. On that day, the membership status will be changed to *Pending - Renewal*.

A copy of the email may also be sent to administrators depending on your routing settings.

Automatic invoice generations will be added to the audit log.

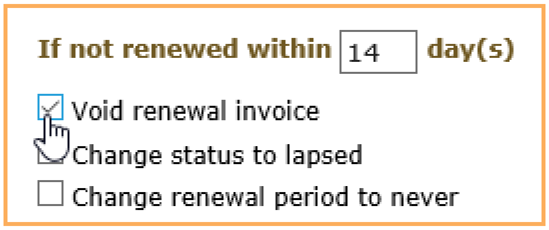
Automatically voiding overdue membership renewal invoices

You can provide for membership renewal notices to be automatically voided a certain number of days after the renewal date.

Read more/less

To enable automatic voiding of renewal invoices:

1. Hover over the **Members** menu and select the **Levels** option.
2. Select the level for which you want automatic voiding of renewal notices.
3. Click **Renewal policy**.
4. Under **If not renewed within *x* days**, enter the number of days after the renewal date to void the invoice.
5. Check the **Void renewal invoice** option.



The **Change status to lapsed** option is automatically enabled.

6. Click **Save**.

The membership renewal invoice will be automatically voided for members with a status of *Pending - Renewal* if not fully paid within the specified number of days following the renewal date. The invoice will be voided whether generated automatically or manually.

The voiding will be recorded in the audit log.

On this page:

- Renewing a membership
- Changing membership level
- Automatically generating membership renewal invoices
- Automatically voiding overdue membership renewal invoices

Expand all sections

See also:

- Membership renewal settings
- Manual member renewal
- Membership levels

View account history and pay invoices

View account history and pay invoices

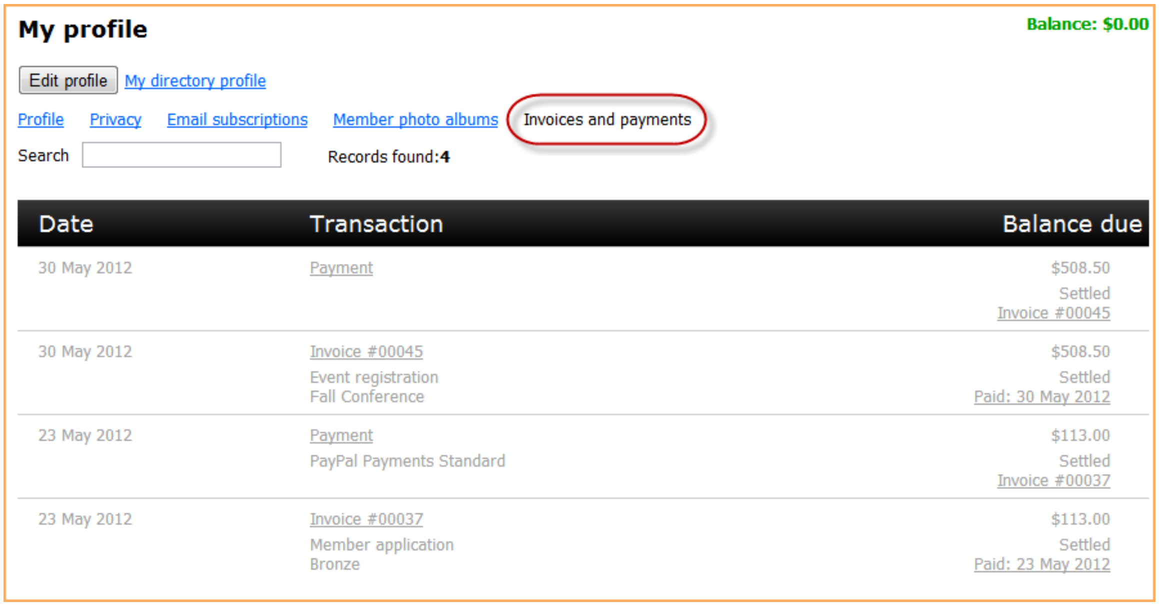
Wild Apricot offers a number of online self-service functions for your members and other contacts, including the ability for each contact to view their financial history, as well as the ability to pay for one or more invoices online.

Displaying invoices and payments

To display their invoices and payments, a person in your contact database follows these steps:

Read more/less

1. Logs into your Wild Apricot site, from a computer or mobile device.
2. Clicks the **View profile** link, or – depending on your website theme – their name which may appear in place of the **View profile** li nk.
3. Clicks the **Invoices and payments** link.

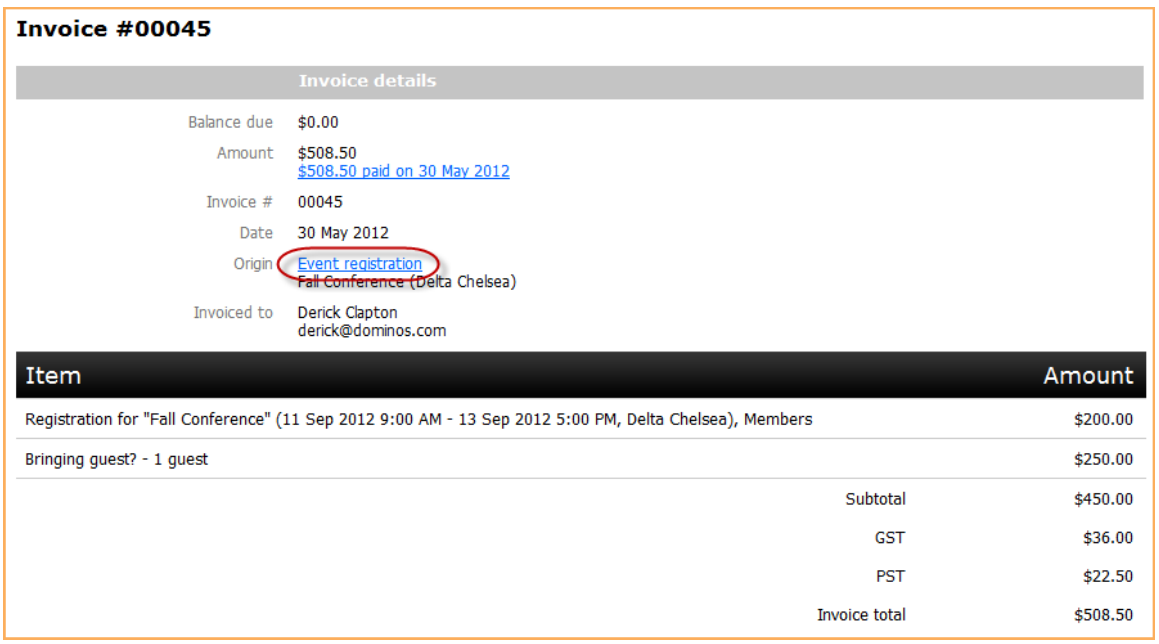


Viewing invoice details

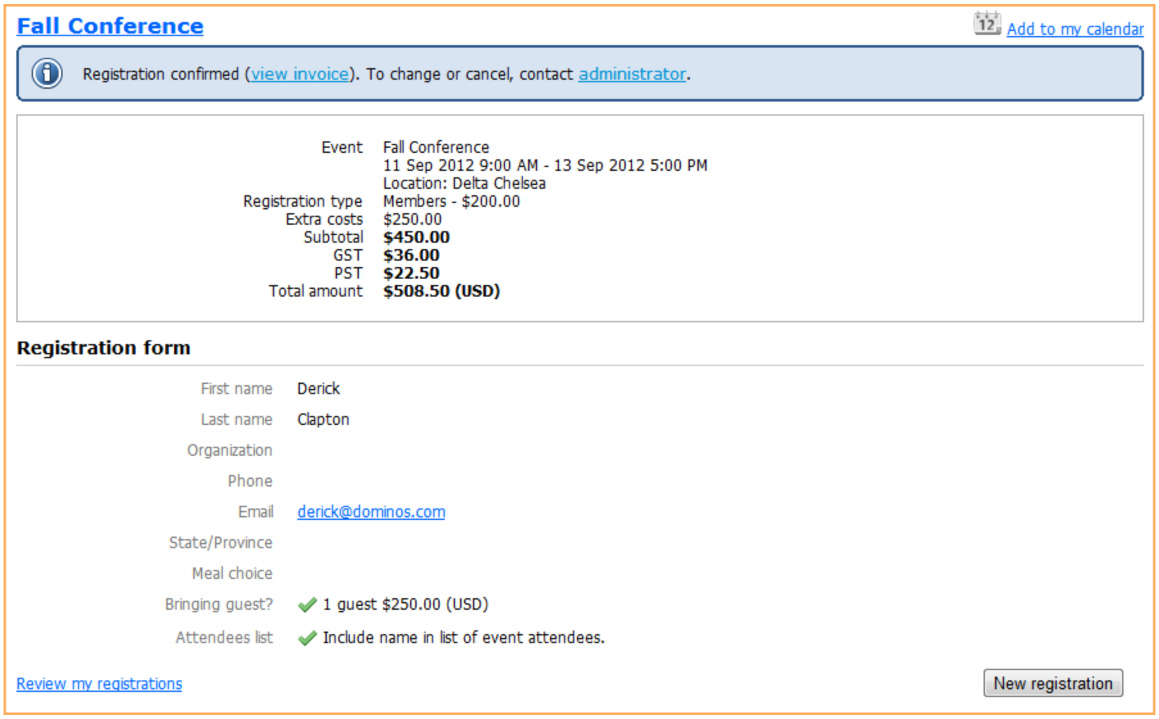
Any record on **Invoices and payments** tab can be opened and reviewed in detail.

Read more/less

For example, to review registration information for an event, they click the corresponding invoice to view the details.



From invoice details, click on **Event registration** link to see the specifics of past event registration.

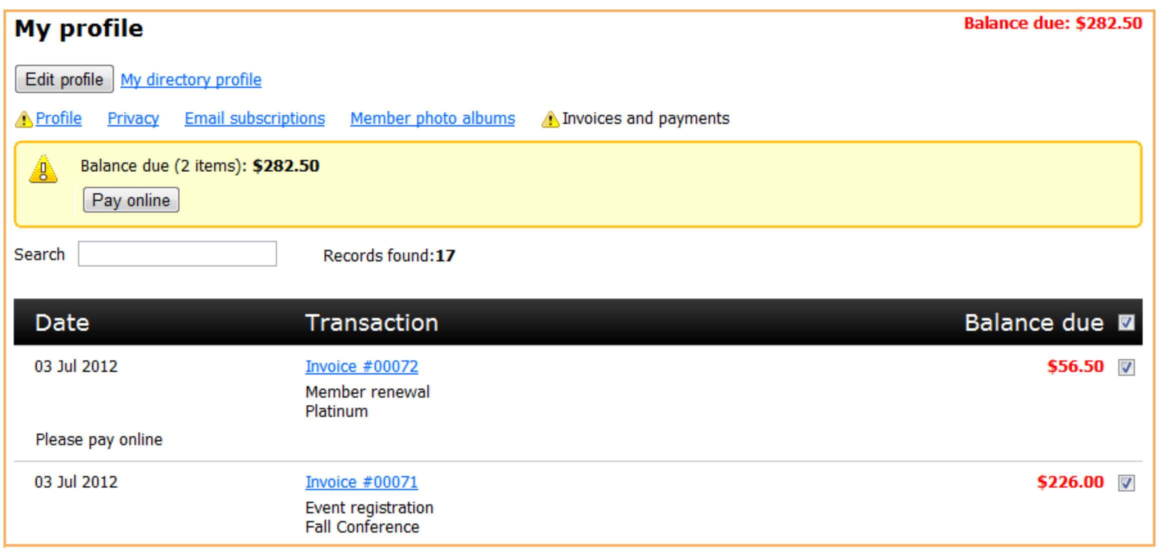


You can customize the details page for invoices, payments, refunds, and donations by modifying the **Financial document** syst em page.

Paying open invoices

Invoices with open balances (unpaid or partially paid) will be shown at the top of the **Invoices and payments** screen.

Read more/less



From here, they can select one or more outstanding invoices then click the appropriate button to make the payment. They can also select and apply any unused account credits to the net amount.

Recurring membership fees have to be paid separately from other invoices.

Invoices can be generated in several ways, such as:

- after completing a transaction
- event registration and/or

- membership application or renewal.

On this page:

Expand all sections

See also:

- Invoices
- Member and contact - edit profile

Paying once for multiple transactions

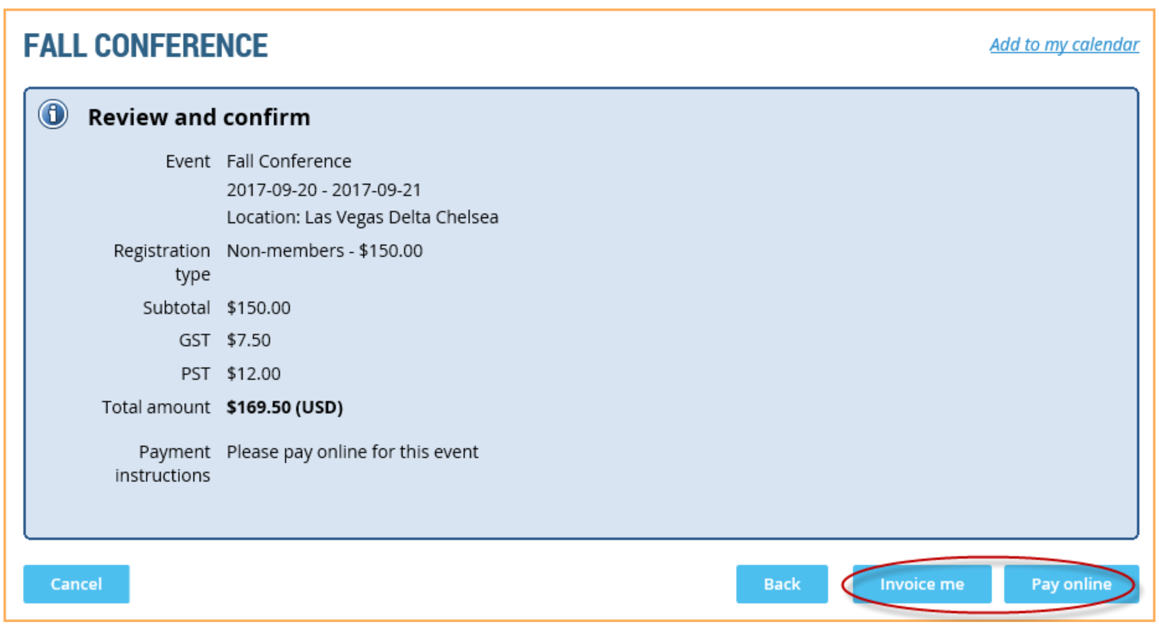
Paying once for multiple transactions

If a visitor is registering for multiple events, or joining as a member and registering for an event at the same time, they can make a single payment for the multiple transactions.

> If you want visitors to be able to join as a member and immediately sign up for events using member-only registration types, uncheck both options under **Membership application review** on the **New applications** tab for the appropriate membership levels. The options to leave unchecked are: **Membership applications must be approved by an administrator** and **Payment has to be received in full before membership is activated**.

To avoid paying separately for each transaction, they should follow these steps:

1. For each transaction except the final one, click the **Invoice me** button rather than the **Pay online** button.



2. For the final transaction, click the **Pay online** button and all the transactions will be combined into a single payment.

Membership renewal settings

Membership renewal settings

To renew their memberships, members can log into your Wild apricot site, click the **Renew** button and then pay the renewal invoice. You can automate the membership renewal process with timed reminders and actions for each membership level. You can also provide for a membership renewal invoice to be automatically generated and emailed to members a specific number of days before their renewal date.

To fully automate the renewal process, you can set up recurring payments. With recurring payments, membership dues can be automatically charged on a regular schedule, saving your members the trouble of having to manually renew their membership.

Membership renewal settings can be accessed under the **Renewal policy** tab for each membership level. Renewal settings apply to overdue active members, and members with a status of Pending - Renewal or Pending - Level change. They do not apply to lapsed members, or members with a status of Pending - New.

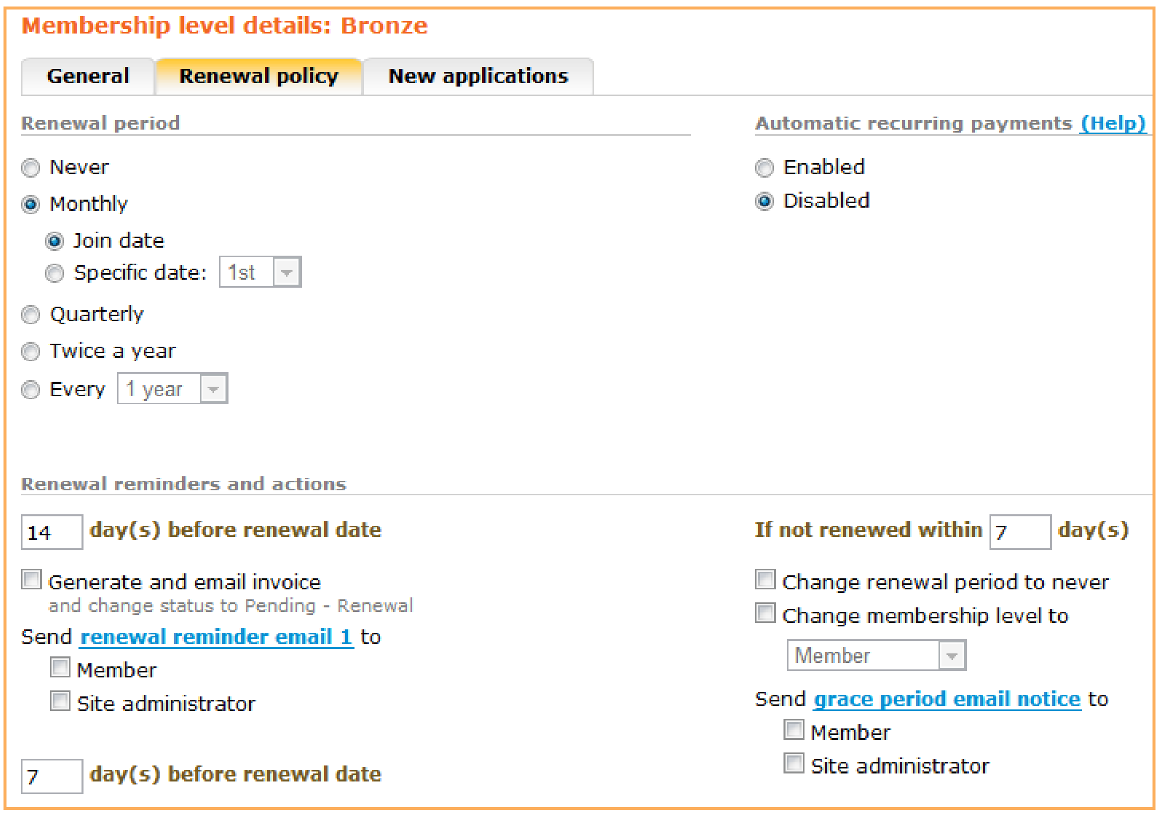
> Members within a membership bundle all share the same renewal date, which is defined on the bundle administrator's membership record.

Changing renewal settings

To change the renewal settings for a particular membership level, follow these steps:

Read more/less

1. Hover over the **Members** menu and select the **Levels** option.
2. Select the level you want to modify.
3. Click the **Renewal policy** tab.
4. Adjust your policy settings as required. See below for a description of each setting.
5. Click **Save**.

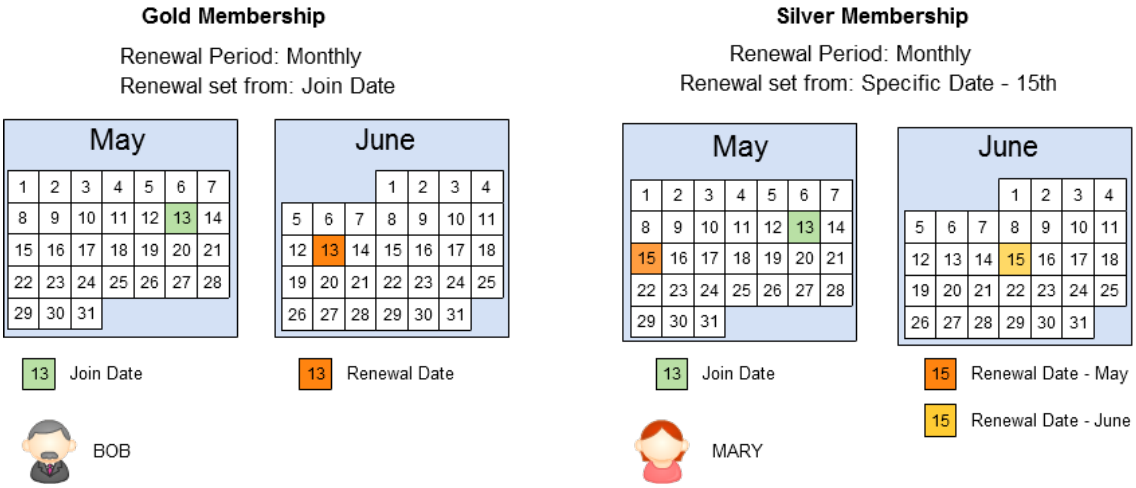


Setting the renewal period and date

From each membership level's **Renewal policy** tab, you can set the renewal period – the interval of the membership (Never, Monthly, Quarterly, Twice a year, Every *x* years) – and the renewal date – either the date the member joins (join date), or a specific date (e.g. 1st or 15th of the month).

Read more/less

For example:



In this example, both Bob and Mary have signed up for membership on the 13th of May. Bob has signed up for Gold membership while Mary picked Silver membership. Both of these membership levels have a monthly renewal period; however, the Gold membership renews from the **Join date** whereas the Silver membership renews from a **Specific date** (e.g. every 15th of a month). In this case, Bob will have an entire month before his next renewal due date and payment are due, but Mary will only have 2 days until her first renewal because her membership renews on the 15th of every month irrespective of the date she joined. See Renewal date calculation for more details on renewal date calculation.

> You have the option of allowing membership dues for new members to be adjusted proportionally according to the actual remaining time before the next renewal date. For more information, see Prorating membership dues for new applications.

Setting up automatic recurring payments

From the **Renewal policy** tab, you can set up recurring payments so that memberships can be automatically renewed on a regular schedule.

Read more/less

> Recurring payments are only supported for Community plans and higher, and not for renewal periods greater than 1 year (see Functionality by billing plan).

Before you can enable recurring payments for membership levels, you must configure your payment settings. For more information, see Recurring payments.

To enable recurring payments for a membership level, click **Enabled** under **Automatic recurring payments**.

If you chose a specific date rather than the join date for the renewal period, new members will be billed the full membership fee for the period between the join date and the first renewal date. You cannot enable prorating of membership fees for levels with automatic recurring payments.

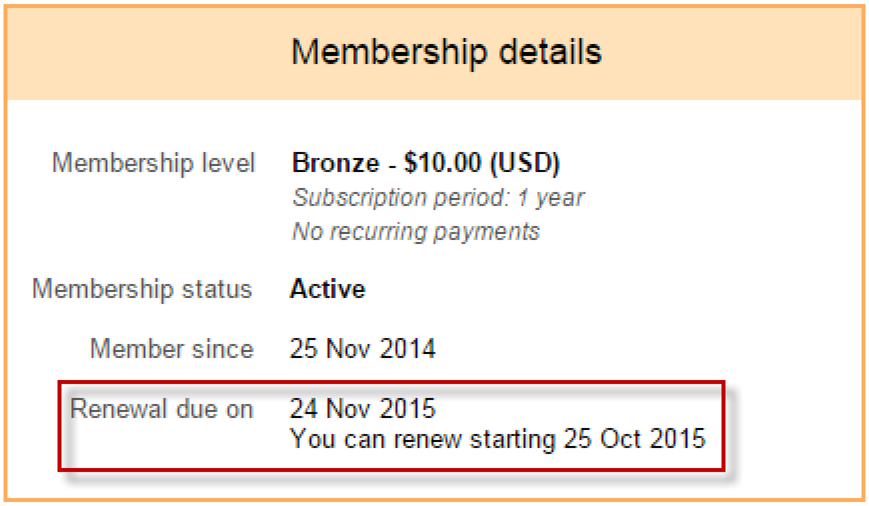
Limiting renewals

From the **Renewal policy** tab, you can limit renewals to a single renewal period ahead, and control when members can renew.

Read more/less

If you check the **Limit renewal to 1 period ahead** option, then members cannot renew an infinite number of periods into the future. With this option enabled, you can also choose to limit renewals to a certain number of days or months before the membership expires. These options are only available after you select a renewal period (above).

When a member is prevented from renewing because of these limits, a notice informing the member of the next possible renewal date will appear in place of the **Renew** button.



Enabling renewal reminders and actions

From the **Renewal policy** tab, you can enable the following renewal reminders and actions.
Read more/less

Default time period	Setting	Description
14 days before renewal date	Generate and email invoice	A membership renewal notice and an invoice will be automatically generated and emailed to active members who have not yet renewed, and their membership status will be changed to *Pending - Renewal*. Depending on your routing settings, a copy of the email may also be sent to one or more administrators. If the member clicks the **View invoice online** lin k within the emailed invoice, they will be able to view and pay the invoice online without logging in. If you remove the **View invoice online** link from the default invoice template, it will not be automatically added to your email. Once this option is enabled, the renewal invoice will be emailed **regardless** of the settings on Invoice settings screen. This option is not available for levels with automatic recurring payments.
	Send renewal reminder email 1	Reminder email will be sent to member and/or site or bundle administrator. To modify the reminder email, click the **renew al reminder email 1** link.
7 days before renewal date	Send renewal reminder email 2	Reminder email will be sent to member and/or site or bundle administrator. To modify the reminder email, click the **renew al reminder email 2** link.

Renewal date	Send renewal day email notice	Renewal day email notice will be sent to member and/or site or bundle administrator. To modify the renewal day email notice, click the **renewal day email notice** link.
If not renewed within 7 days	Change renewal period to never	Renewal period for the member will be changed to **Never**.
	Change membership level to	Membership level for the member will be changed to the level you choose.
	Send grace period email notice	Grace period email notice will be sent to member and/or site or bundle administrator. To modify the grace period email notice, click the **grace period email notice** link.
If not renewed within 14 days	Void renewal invoice	Membership renewal invoice will be automatically voided for members with a status of *Pending - Renewal* if not fully paid within the specified number of days following the renewal date. The invoice will be voided whether generated automatically or manually. When you enable this option, the **Change status to lapsed** option is automatically enabled.
	Change status to lapsed	Membership status of the member will be changed to **Lapsed**.
	Change renewal period to never	Renewal period for the member will be changed to **Never**.
	Change membership level	Membership level for the member will be changed to the level you choose.
	Suspend membership	Suspend the member, converting them to a non-member contact. Membership details will be remembered, and the membership can be resumed by an administrator. For more information, see Suspending a membership.
	Archive record	Archive the member's record.
	Send lapsed email notice	Lapsed email notice will be sent to member and/or site or bundle administrator. To modify the lapsed email notice, click the **lapsed email notice** link.

You can also control who receives the following renewal notifications. In each case, you can send the notification to the member and/or your organization contact. For bundle levels, you can choose to send them to the bundle member, bundle administrator, and/or organization contact.

Notification	Description
Renewal pending email	Sent when a renewal invoice has been automatically generated by the system or manually generated by the administrator, or when the member has already started the renewal but has not completed the payment.

Renewal confirmed email	Sent after renewal was paid or confirmed manually by administrator.
Credit card expiry notification	Sent two weeks before and on date of credit card expiry. Applies only to Stripe, Authorize.Net, Moneris, and Payflow Pro payment gateways.
Recurring renewal failed email	Sent when online payment for renewing a recurring membership fails.

When you create a membership level, the renewal reminder emails are copied from the default membership emails. You can customize the default membership emails or modify reminder emails for individual membership levels.

If the member is lapsed, overdue, or within a week of their renewal date, a status message will appear in the bottom right corner when they log in.

Automatically generating membership renewal invoices

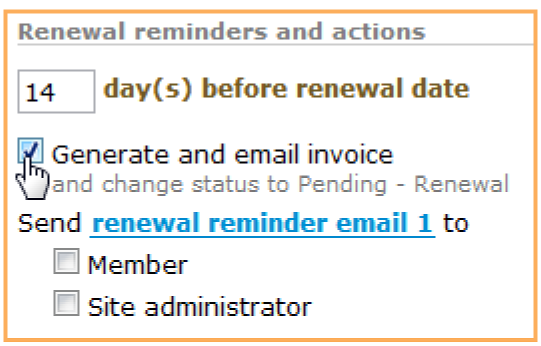
For each membership level, you can provide for a membership renewal invoice to be automatically generated and emailed to members a specific number of days before their renewal date.

Read more/less

If you automatically generate a renewal notice, then optional extra membership costs cannot be selected as part of the renewal process. Also, you cannot use discounts for renewals with this option enabled.

To enable automatic voiding of renewal invoices:

1. Hover over the **Members** menu and select the **Levels** option.
2. Select the level for which you want automatic generation of renewal notices.
3. Click **Renewal policy**.
4. Under **Renewal reminders and actions**, enter the number of days in advance of the renewal date to email the invoice.
5. Check the **Generate and email invoice** option.



6. Click **Save**.

The membership renewal notice will be automatically generated and emailed to active members the specified number of days in advance of their renewal date. On that day, the membership status will be changed to *Pending - Renewal*.

A copy of the email may also be sent to administrators depending on your routing settings.

Automatic invoice generations will be added to the audit log.

Automatically voiding overdue membership renewal invoices

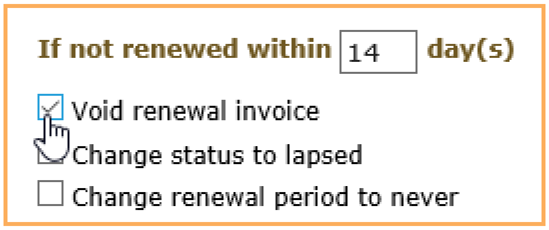
You can provide for membership renewal notices to be automatically voided a certain number of days after the renewal date.

Read more/less

To enable automatic deletion of renewal invoices:

1. Hover over the **Members** menu and select the **Levels** option.
2. Select the level for which you want automatic voiding of renewal notices.

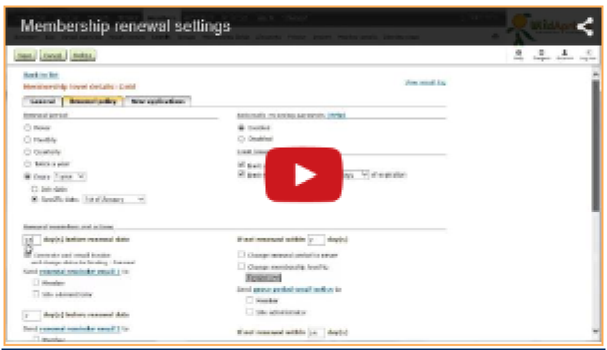
3. Click **Renewal policy**.
4. Under **If not renewed within *x* days**, enter the number of days after the renewal date to void the invoice.
5. Check the **Void renewal invoice** option.

   The **Change status to lapsed** option is automatically enabled.
6. Click **Save**.

The membership renewal invoice will be automatically voided for members with a status of *Pending - Renewal* if not fully paid within the specified number of days following the renewal date. The invoice will be voided whether generated automatically or manually.

The voiding will be recorded in the audit log.



Video: Membership renewal settings (5:40)

On this page:

Expand all sections

See also:

- Recurring payments
- Customizing default membership emails
- Customizing invoices and receipts
- Member - renew or change level
- Prorating membership dues for new applications
- Renewal date calculation

Manual member renewal

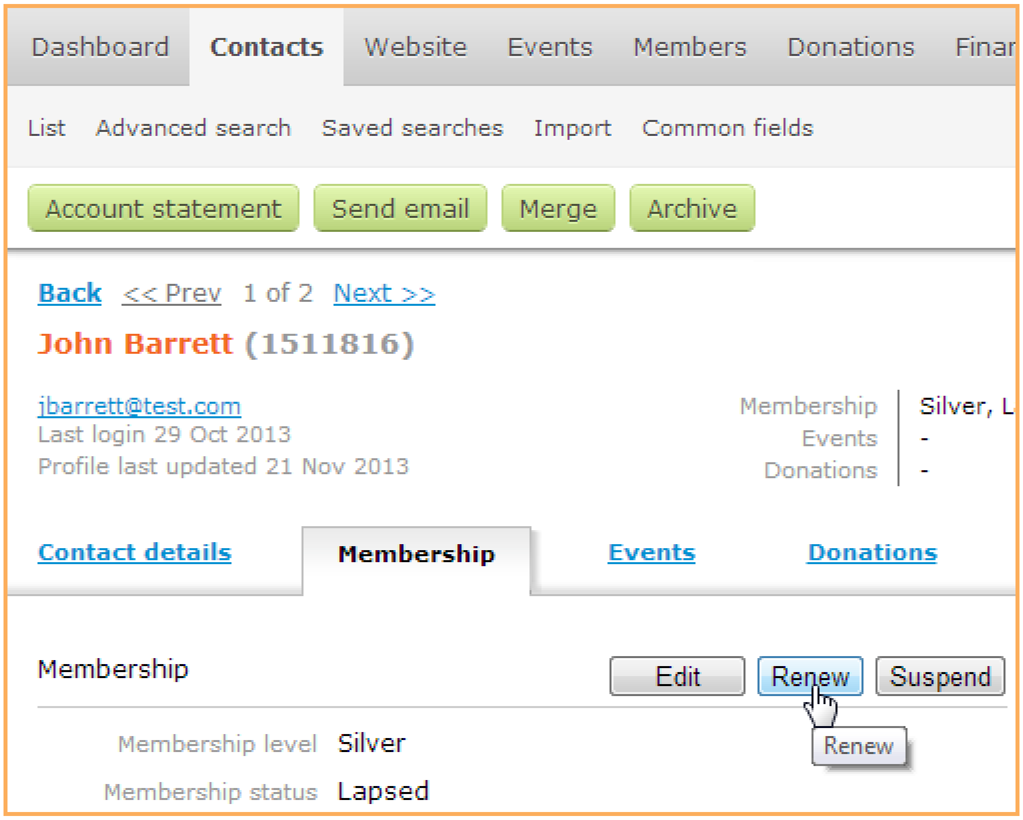
Manual member renewal

There are several ways in which memberships can be renewed.

- Members can renew their memberships themselves through their online profile pages.
- Administrators can set up automatic membership renewals.
- Administrators can process a membership renewal manually.

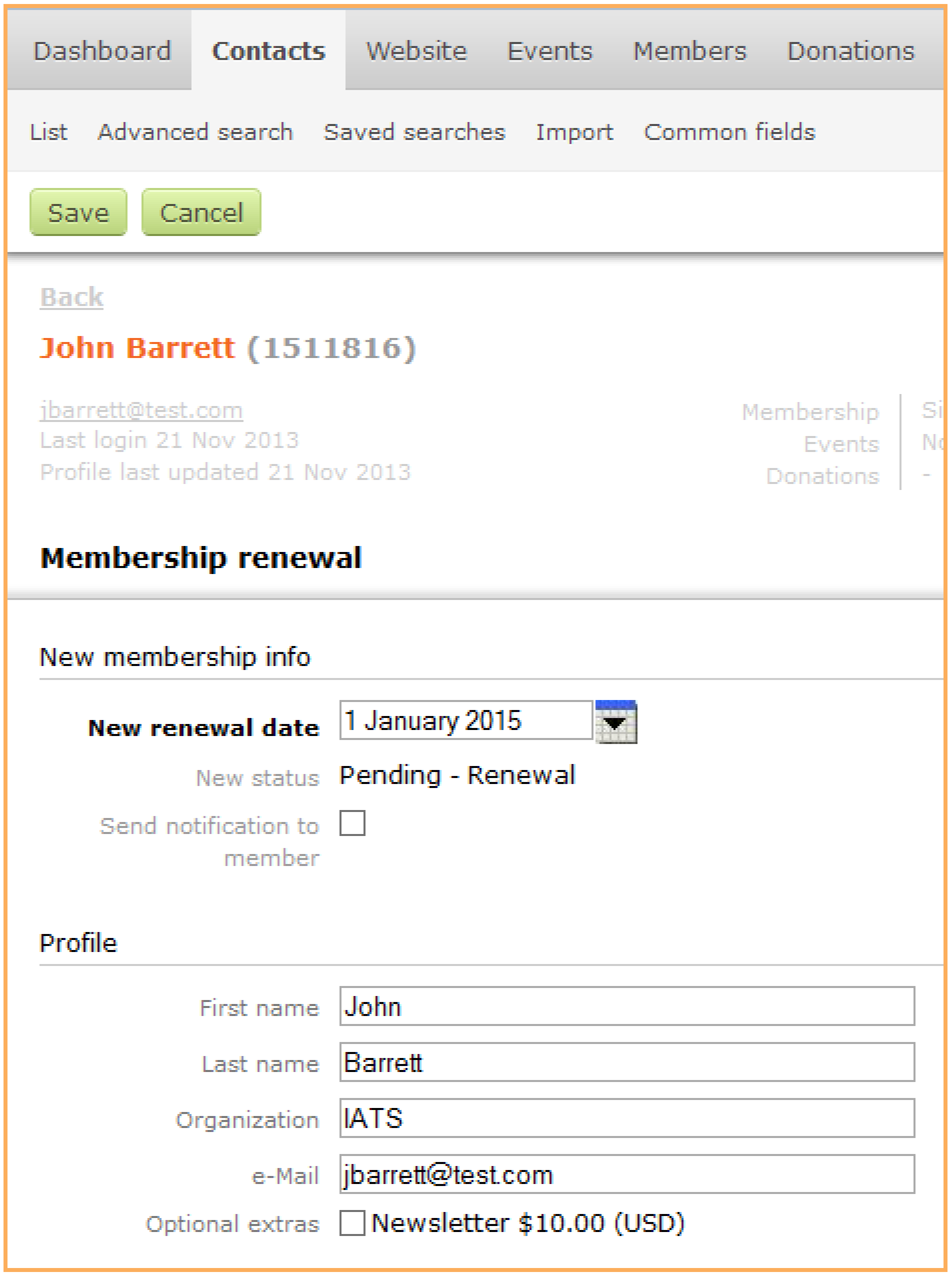
Only full administrators and membership managers can process membership renewals. For more information, see Managing site administrators.

To manually renew a membership, you start by finding the member's contact record. From the member's contact record, click the **Renew** button.



The **Renew** button only appears if the membership level renewal period is set to something other than *Never*, and if there is a specific renewal due date in the member record. The button will not appear for members with recurring payments.

On the screen that appears, you can specify the next renewal date, choose whether to send a renewal notice to the member, and adjust common and membership field values.



The membership status will be automatically set to *Pending - Renewal*.

When you are finished adjusting the membership details, click **Save** to complete the renewal. Unless the membership level is free, you will be asked to choose one of the following options:

- **Activate without invoice** – activates the membership renewal without generating an invoice. Choose this option if you do not want to track this transaction in Wild Apricot.
- **Generate invoice** – generates an invoice for the membership renewal. The member can then pay the invoice online through their profile or by using an offline payment method (e.g. cash, check).
- **Cancel** – cancels the membership renewal.

If the membership level is free, you will be asked to confirm the renewal.

Suspending a membership

Suspending a membership

You may wish to suspend someone's membership for a variety of reasons. You can also suspend a member to convert the member into a contact.

What you need to know

Click/tap to expand/collapse

- Suspending a member will:
  - Remove the membership so that the member become a non-member contact
  - Hide them from any member directory
  - Keep an archive of their membership level and status
  - Keep all their contact information as it was before (e.g. you can still send emails to this person)
- If the member has recurring payments with PayPal, suspending the member will not stop the recurring payments on the former member's card. The recurring payments must be stopped manually .
- When you suspend a bundle administrator, you automatically suspend all the members of that bundle. If you want to suspend just the bundle administrator, first change who is the bundle administrator, then suspend the now ex-bundle administrator.
- Since suspended members are non-member contacts, they continue to count against your account's contact database limit .
- A suspended member – now a regular contact – can apply for membership like anyone else.

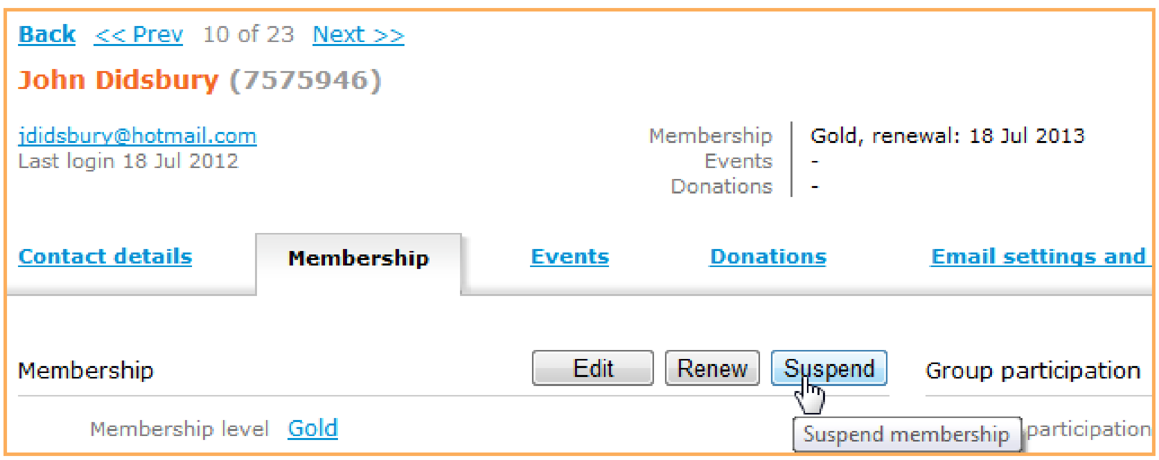
Suspending a member

You can manually suspend a member, or you can set the renewal policy for your membership levels so that members are automatically suspended if they don't renew their membership within a certain number of days. For more information on automatically suspending members as part of your renewal policy, see Enabling renewal reminders and actions.

To manually suspend a membership, follow these steps:

Read more/less

1. Display the member's contact details.
2. Click the **Membership** tab.
3. Click the **Suspend** button.



4. Click **OK** to confirm.

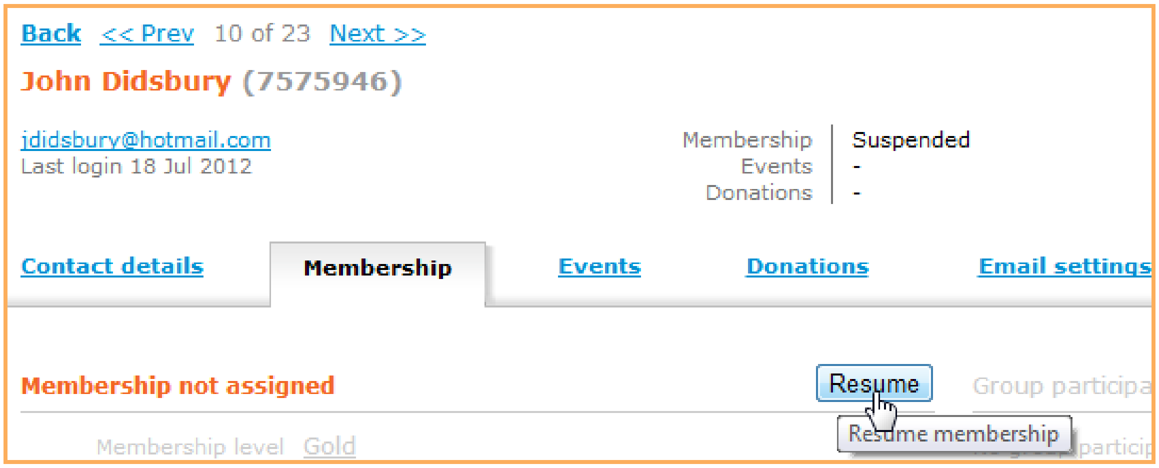
You can suspend multiple members in bulk by setting the **Membership enabled** spreadsheet cell to *no* as part of the process of making Bulk changes using import and export.

Reinstating a suspended member

If, at a later date, you wish to reinstate a suspended member, you can click on the **Resume** button within their membership tab.

Read more/less

This will reactivate them to their previous membership level with all their details intact.



The renewal date and payment/approval status will not be changed when a membership is resumed. You may have to manually edit the renewal date to reflect any time that the contact may be owed while their membership was suspended.

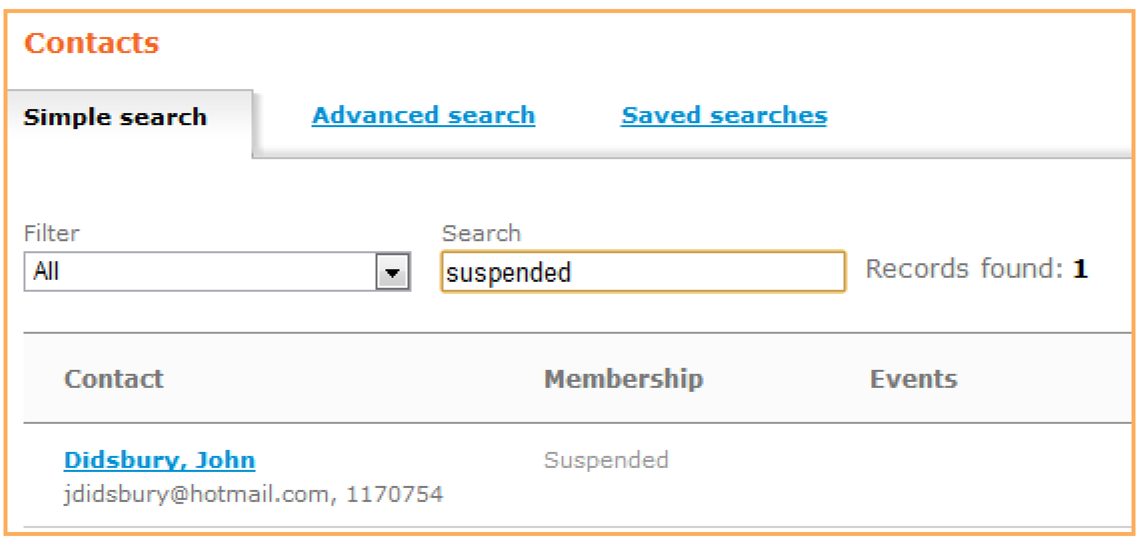
The member will **not** receive a email notification when you resume their membership.

You can reinstate multiple members in bulk by setting the **Membership enabled** spreadsheet cell to *yes* as part of the process of making Bulk changes using import and export.

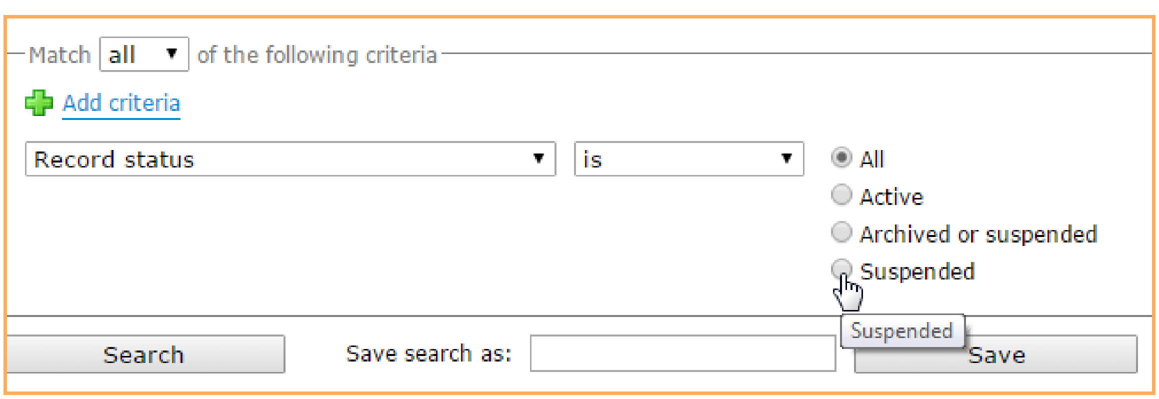
Viewing suspended members

To view a list of suspended members, go to your contacts list and perform a simple search with *suspended* as the search string.

Read more/less



or perform an advanced member search and choose the **Record status** criterion then select the **Suspended** value.



On this page:

- What you need to know
- Suspending a member
- Reinstating a suspended member
- Viewing suspended members

Expand all sections

See also:

- How membership status affects available functionality
- Deleting and archiving member and contact records

Member and contact statuses

Member and contact statuses

Everyone in your Wild Apricot database is a contact. A member is a contact who is assigned to a particular membership level. Members typically choose their membership level when they apply to membership through a membership application form.

When someone visits your Wild Apricot site, the options available to them depends on whether they are a member or a contact, and on their member or contact status. A member can see their membership status on their member profile. A member's status can be updated manually by an administrator or automatically by the system.

SHOW ME (7:30)

Members and contacts can have the following statuses.

Member statuses

Status	Meaning	For more info, see...
Active	A member in good standing with full member benefits (e.g. listed in member directory, access to restricted pages, etc).	Membership status and functionality
Lapsed	A member who has lost membership privileges because of unpaid membership fees. A member's status may be set to lapsed if they have not renewed their membership within a certain period following their renewal date. A lapsed member does not receive automatic renewal notices or appear in member directories, and is not allowed to view member only pages, add comments to blog pages, or post or reply to forum topics. Unlike a suspended member (see below), a lapsed member can restore their membership by paying the renewal fee.	Membership renewal settings
Pending - New	A membership that has not been activated because it is awaiting administrator approval or payment of the membership fee.	Membership status and functionality
Pending - Renewal	A member's membership is up to renewal, and a renewal invoice has been generated, or the member has begun the renewal process, but hasn't yet paid the membership fee.	Membership status and functionality

Pending - Level change	The member has initiated a level change but is either awaiting administrator approval, or has been not yet paid the membership fee for the new level (where required). Members must pay the full membership fee when they change levels. There is currently no pro-rating based on the previous membership level.	Membership status and functionality
Suspended	A member whose membership has been revoked and now appears as a non-member contact. Suspended members do not appear in member directories or featured member gadgets. A suspended member can apply for membership just like any other contact.	Suspending memberships

Contact statuses

Status	Meaning	For more info, see...
Active	A contact who has not been archived, and therefore appears in the contact list.	Archived vs. active records
Archived	A contact who has been removed from your contact list without being deleted from your Wild Apricot database. An archived contact is automatically excluded from email blasts – including event notices – and does not count toward your database limit. Archived contacts are automatically restored when they log in to your Wild Apricot site, register for an event, apply for membership, make a donation, or subscribe to a forum or forum topic. If the contact is a member, their membership level and status will also be restored.	Archived vs. active records

How membership status affects available functionality

How membership status affects available functionality

When someone visits your Wild Apricot site, the options available to them depends on whether they are a member, a contact, or someone not in your database. If they are a member, then their options are further defined by their membership status. A member can see their membership status on their member profile. A member's status can be updated manually by an administrator or automatically by the system .

The table below summarizes the functionality available to different kinds of visitors, in the absence of any other restrictions you may have manually applied while setting up site pages, membership levels, and events.

	Active	Pending New	Pending Renewal	Pending Level Change	Lapsed	Suspended	Archived	Contact	Visitor
See own profile	**Yes**	**Yes**	**Yes**	**Yes**	**Yes**	**Yes**	**Yes** [1]	**Yes**	n/a
Edit profile	**Yes**	No	**Yes**	**Yes**	**Yes**	**Yes**	**Yes** [1]	**Yes**	n/a
See membership fields in own profile	**Yes**	**Yes**	**Yes**	**Yes**	**Yes**	No	**Yes** [1]	No	n/a

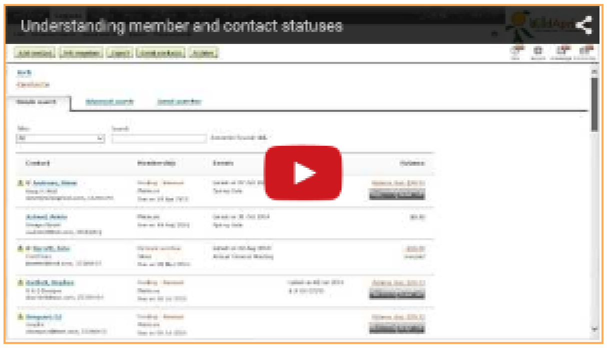
Appear in member directory	**Yes**	No	**Yes**	No	No	No	No	No	No
View member-only pages	**Yes**	No	**Yes**	No	No	No	No	No	No
Apply for membership	No	No	No	No	No	**Yes**	**Yes**	**Yes**	**Yes**
Renew or change membership	**Yes**	No	No	No	**Yes**	n/a	**Yes** [1]	n/a	n/a
View or register for events	**Yes**	**Yes**	**Yes**	**Yes**	**Yes**	**Yes**	**Yes** [1]	**Yes**	**Yes**
Register using member-only registration type	**Yes**	No	**Yes**[2]	**Yes**[2]	No	No	No	No	No
Receive event announcements	**Yes**	**Yes**	**Yes**	**Yes**	**Yes**	**Yes**	No	**Yes**	No
Receive event reminders	**Yes**	**Yes**	**Yes**	**Yes**	**Yes**	**Yes**	n/a	**Yes**	n/a
Receive automatic renewal notices	**Yes**	No	**Yes**	No	No	No	No	No	n/a
Receive email blasts	**Yes**	**Yes**	**Yes**	**Yes**	**Yes**	**Yes**	No	**Yes**	No
View blog	**Yes**	**Yes**	**Yes**	**Yes**	**Yes**	**Yes**	**Yes**	**Yes**	**Yes**
Post or comment in blog	**Yes** [3]	**Yes** [4]	**Yes** [3]	**Yes** [3]	**Yes** [4]	**Yes** [4]	**Yes** [1 3]	**Yes** [4]	**Yes** [4]
View forum	**Yes** [3]	**Yes** [4]	**Yes** [3]	**Yes** [3]	**Yes** [4]	**Yes** [4]	**Yes** [1 3]	**Yes** [4]	**Yes** [4]
Create topics and comment in forum	**Yes** [3]	**Yes** [4]	**Yes** [3]	**Yes** [3]	**Yes** [4]	**Yes** [4]	**Yes** [1 3]	**Yes** [4]	**Yes** [4]
Bundle admin can add to bundle	**Yes**	No	No	No	No	No	No	No	No

[1]Archived contacts are automatically restored when they log in to your Wild Apricot site, register for an event, apply for membership, make a donation, or subscribe to a forum or forum topic. If the contact is a member, their membership level and status will also be restored.

[2]For existing members, member-specific registration types are only available if their renewal date is not in the past. This prevents existing members whose membership is not paid up from using member-specific registration types.

[3]Subject to membership level access permission settings in gadget settings.

[4] Subject to public level access permission settings in gadget settings.



Video: Understanding member and contact statuses (7:30)

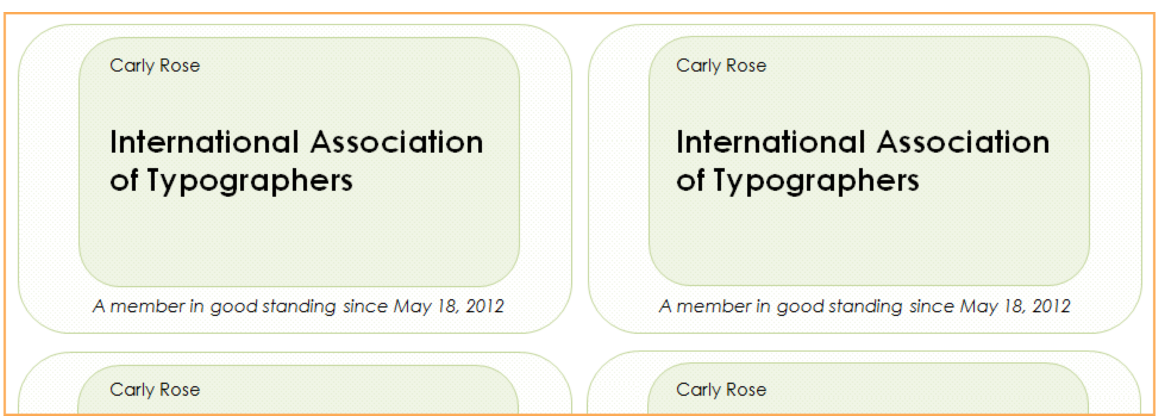
See also:

- Member and contact statuses

Printing membership cards using mail merge

Printing membership cards using mail merge

Using Microsoft Word's mail merge feature and your Wild Apricot member database, you can print personalized membership cards, as well as event badges and mailing labels.



To print personalized items like membership cards, you:

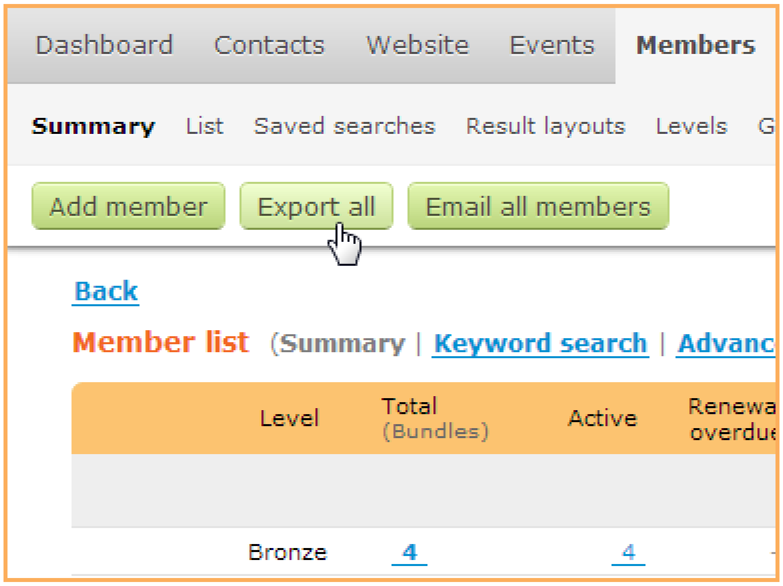
- export your Wild Apricot member list
- create and print your mail merge document in Microsoft Word

Exporting your Wild Apricot member list

Read more/less

To export your Wild Apricot member list, follow these steps:

1. Hover over the **Members** menu and select the **Summary** option.
2. Do not filter the list unless you want to print cards only for selected members.
3. Click the **Export all** button.



4. On the screen that appears, select CSV as the export file format.
5. Choose which fields to include in the export file.
6. Click the **Export** button .

While the export file is being generated, you can click the **Continue working** button and safely switch to another Wild Apricot admin screen. Once the file is generated, you'll receive an email with a link to the file.

If you waited until the export file was generated, the file will be automatically downloaded. As well, a dialog with a link to the file will appear, and an email with the link will be sent to you.

> Before clicking the download link within the email, make sure you are logged into your Wild Apricot account as an administrator , and in admin view.

Creating your mail merge document

The next step in printing membership cards involves creating a Word document that is formatted to print onto sheets of perforated business cards. The document will include codes to insert member-specific information on each sheet.

Using templates

Click/tap to expand/collapse

To create the Word document, you use a pre-designed template provided by Microsoft or by the vendor of the specialty paper you are planning to use. A number of specialty paper templates are installed along with Microsoft Word. Additional templates can be downloaded from Microsoft or vendors such as Avery.

For this help topic, we downloaded the Avery club membership card template from Microsoft.

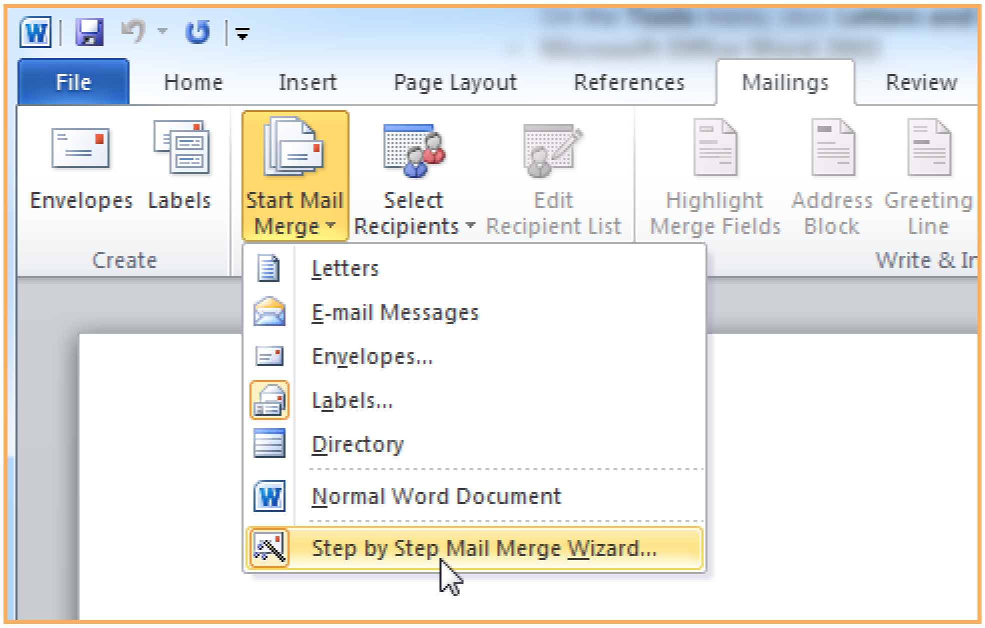
Launching the mail merge wizard

Click/tap to expand/collapse

Even though we'll be using a document template as the basis for the mail merge document, you start by running Microsoft Word and opening a blank document. Next, you launch the mail merge wizard. The mail merge wizard walks you through the steps involved in creating and printing your mail merge document.

The table below shows how to launch the wizard from different versions of Microsoft Word.

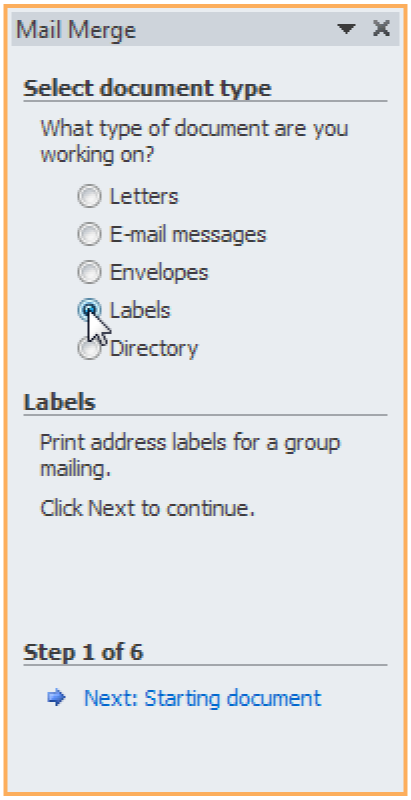
Version	Steps
Microsoft Word 2002	Click the **Tools** menu, click **Letters and Mailings**, then click **Mail Merge Wizard**.
Microsoft Office Word 2003	Click the **Tools** menu, click **Letters and Mailings**, then click **Mail Merge**.
Microsoft Office Word 2007 or later	Click the Mailings tab, click **Start Mail Merge**, then click **Step by Step Mail Merge Wizard**.



Step 1: Choosing the document type

Click/tap to expand/collapse

The first step in creating your mail merge document is to select the document type. For membership cards, you'd need to select the **Labe ls** option.



If you're producing form letters or other documents, you'd select a different option.

After you've made your selection, click the **Next** link at the bottom to continue.

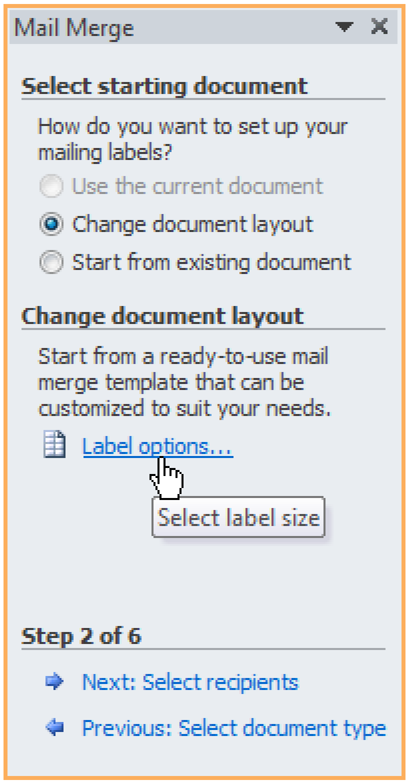
Step 2: Selecting the document template

Click/tap to expand/collapse

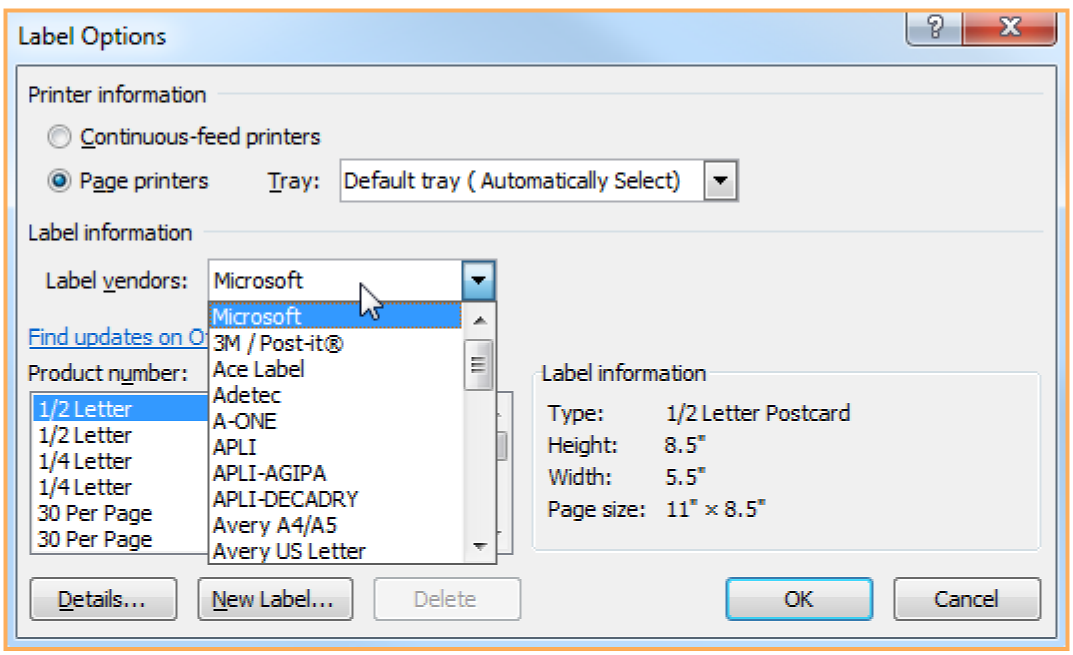
Next, you select the document template to use as the basis for the mail merge document. You can choose from templates installed as part of Microsoft Word or open a template that you downloaded.

Choosing an installed template

To choose an installed template, make sure that **Change document layout** is selected then click **Label options**.

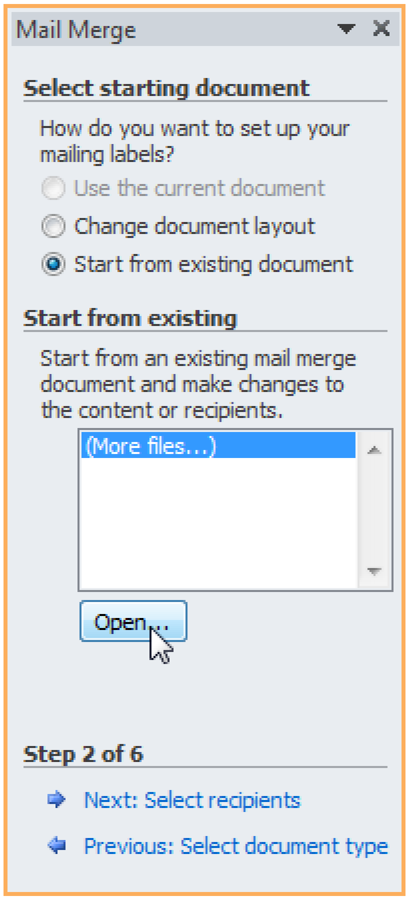


From the Label Options dialog, you can select different document types from the list in the bottom left, and click the **Label vendors** drop-down to display templates from particular specialty paper providers.



Using a downloaded template

To open a template that you downloaded, click the **Start from existing document** option then click the **Open** button.



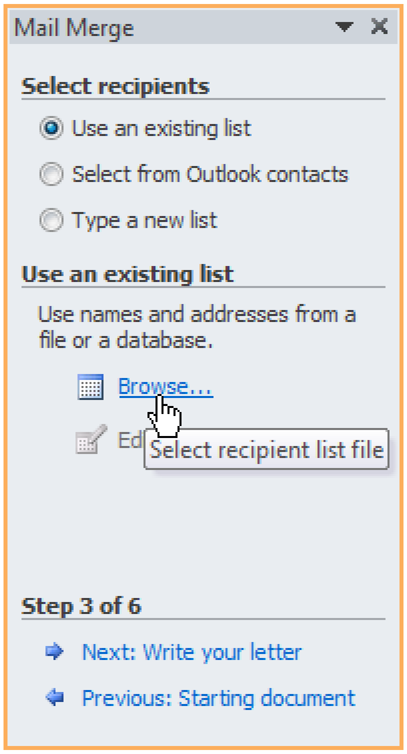
Select the document template file and click the **Open** button.

When you are finished making your selection, click the **Next** link to continue.

Step 3: Selecting the member list

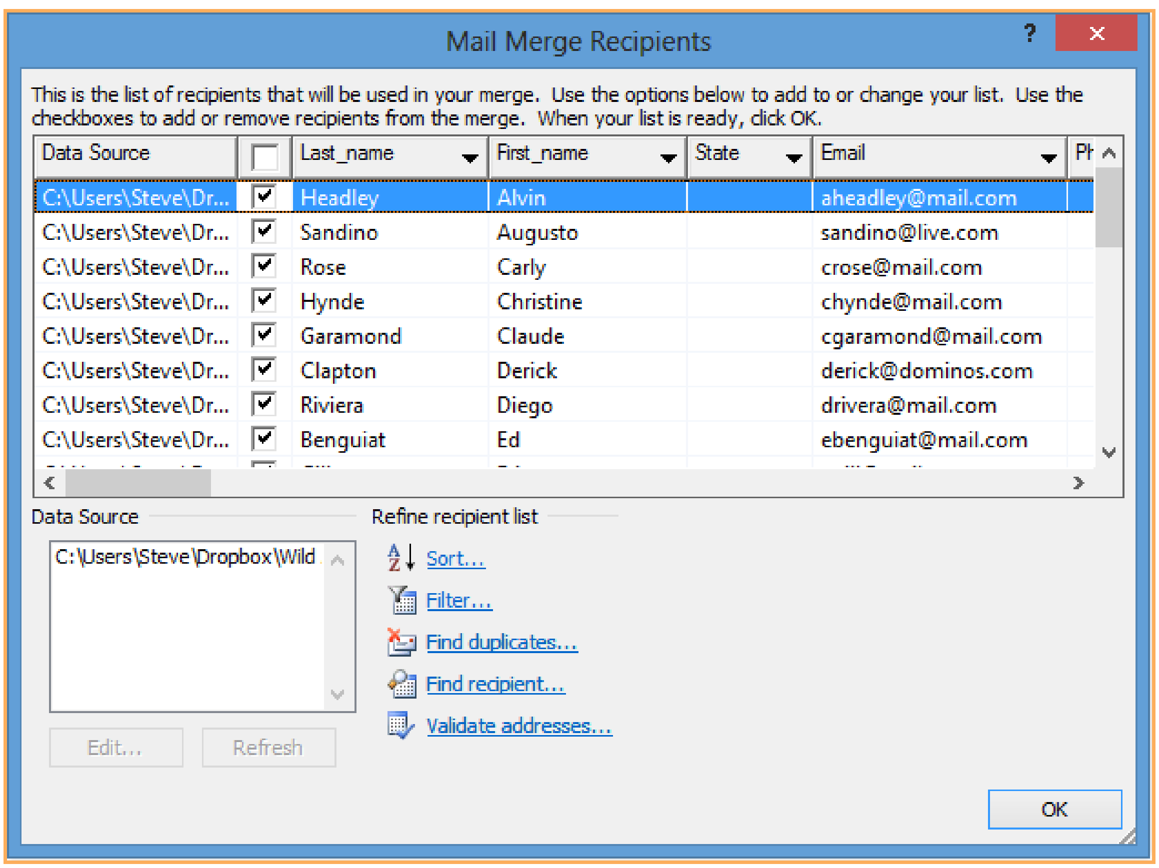
Click/tap to expand/collapse

Now, you attach the file containing your member list. Make sure the **Use an existing list** option is selected, then click the **Browse** link.



Select the .csv file you generated earlier, then click the **Open** button.

A list of your members will appear. At this point, you can edit your database list, sort it by any field, remove duplicates, and decide which entries to use or exclude.



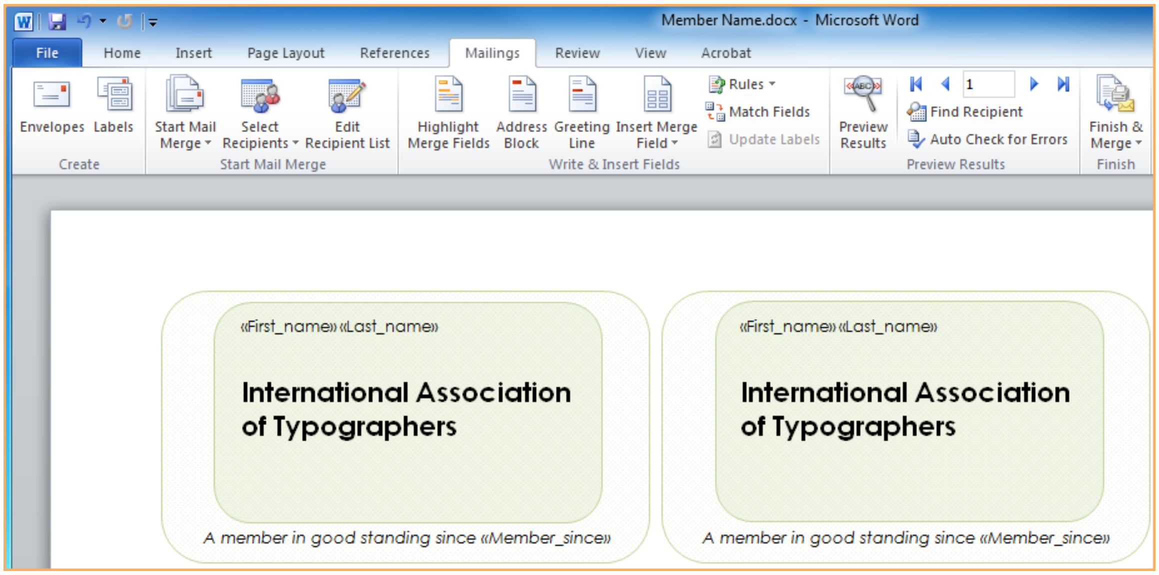
When you are ready to proceed, click the **OK** button then click the **Next** link at the bottom of the mail merge wizard.

Step 4: Entering merge fields

Click/tap to expand/collapse

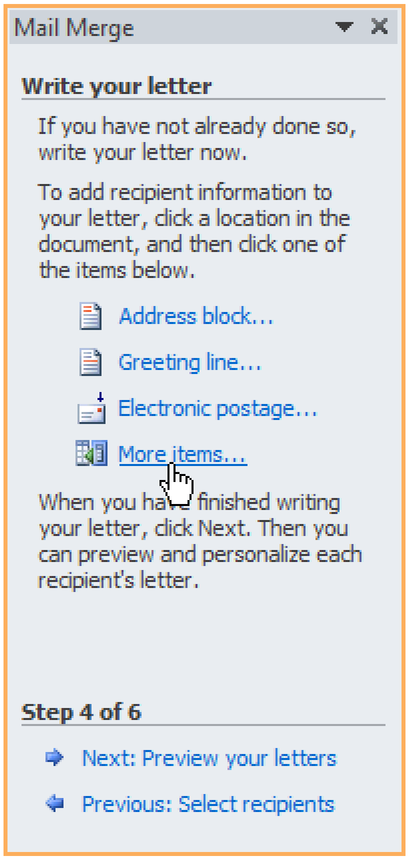
With the member list selected, you can now finalize your document design and insert the fields used to represent the member-specific information, such as name.

Depending on which document template you are using, the page is probably formatted as a table with each cell formatted to print a single business card. Each cell should be identical with a combination of static text or graphics, and merge fields, which appear as codes within angle brackets (e.g. <<First_name>>).

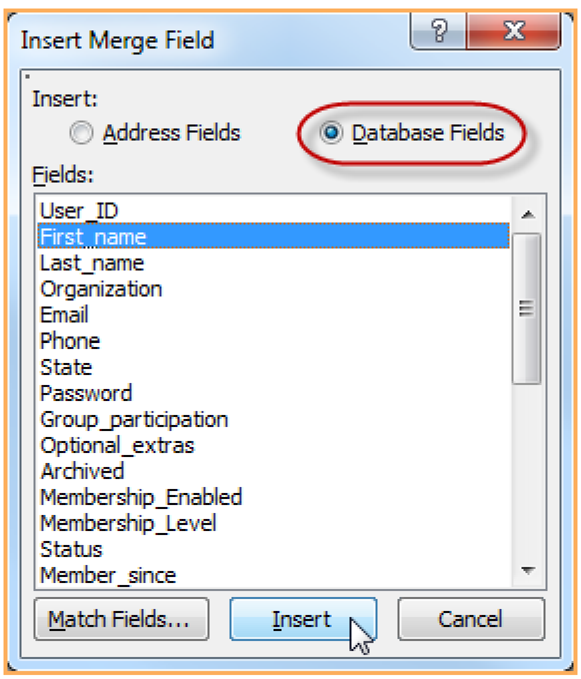


When you print the document, the merge fields will be replaced by actual data, with each page displaying information about a different member. For example, the first page you print will display information about the first member in the database, and the second page will display information about the second member, and so on.

To insert a merge field into your document, click where you want the field to appear, then click the **More items** link.



From the dialog that appears, click the **Database fields** option then select the field from your membership list that you want to include on the card. (e.g. First_name).



Click the **Insert** button to insert the field into your document. Repeat this for each field you want to include. You can choose from a number of contact fields as well as any custom contact fields you have added.

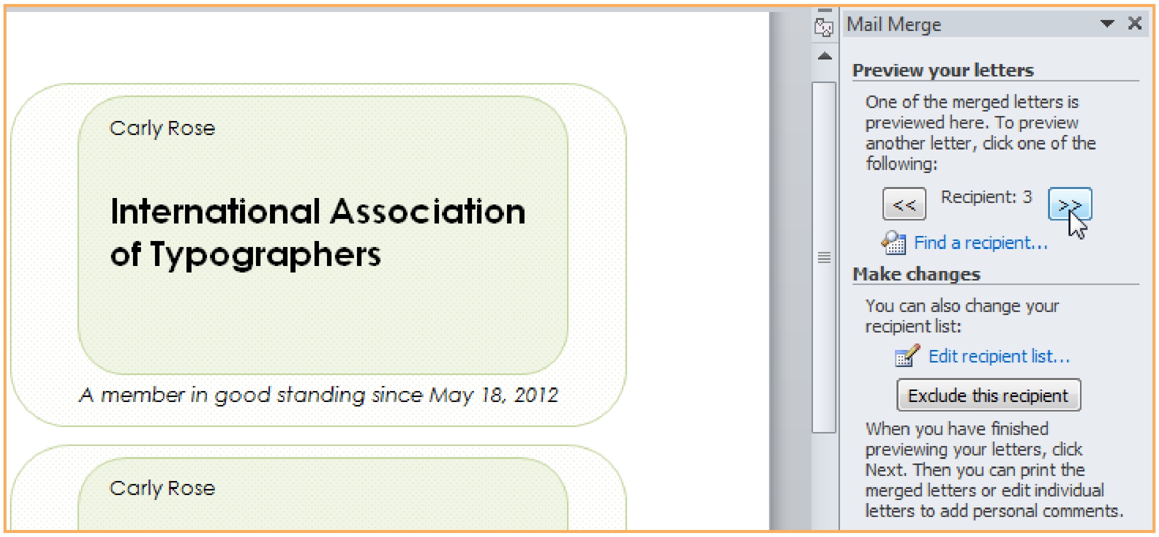
Once you have finalized the your membership card design and inserted merge fields for any member-specific information, click the **Next** l ink at the bottom.

Step 5: Previewing your output

Click/tap to expand/collapse

Now, before printing your membership cards, you can preview your print job so you can correct any errors you didn't notice while designing the cards. For example, you may have forgotten to put a space between the first name and last name fields, something that you only notice when the fields are replaced by actual data.

To scroll through previews for each member in your list, click the **>>** and **<<** buttons.

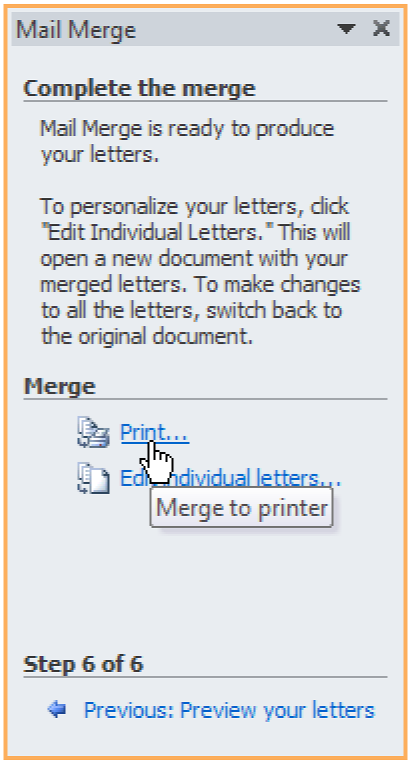


Once you are satisfied with the appearance of your cards, click the **Next** link at the bottom of the wizard.

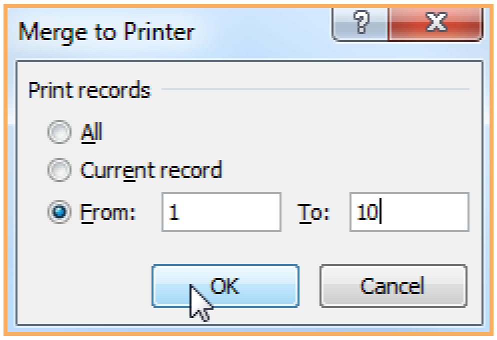
Step 6: Printing your cards

Click/tap to expand/collapse

Now, all that's left is for you to do is save and print your document. After saving your document, click the **Print** link within the wizard.



You can choose to print cards for all members, only for the currently displayed member, or for a range of members (where the range indicates the position of the members within the .csv file).



Once you have chosen which records you want to print, click **OK**.

On this page:

Expand all sections

Site setup and customization

Site setup and customization

Each Wild Apricot account provides a website, hosting for the website, and the interactive tools – known collectively as a Content Management System (CMS) – to set up and manage the website. By default, your site is already set up with several useful pages, including a membership application form and an event calendar.

You can quickly and easily create new pages and modify the default ones, and customize the look, feel, and functionality of the site using tools provided by Wild Apricot. You don't need to do any coding, and you don't need experience designing web pages. For experienced website designers and developers, Wild Apricot provides additional tools for advanced customization and fine-tuning of your Wild Apricot website.

Using widgets, you can add elements from your Wild Apricot site to another website. For example, you can add an event calendar to another site using an event calendar widget.

What you need to know

Click/tap to expand/collapse

- Each page consists of gadgets that display custom content like text and pictures, or dynamic functionality such as menus, blogs, membership application forms, and login boxes.
- Templates form the foundation for individual site pages. Each site page derives its layout from a template, and inherits any gadgets that appear on the template.
- Each page can be based on a different template, and multiple pages can share the same template.
- Each page template is based on a particular master layout which defines the areas – called *placeholders* where content can be

added.

- You can add layouts to divide content areas into sections consisting of columns and rows, with each layout cell acting as a container for one or more gadgets.
- Designing a page involving dropping gadgets into – or between – layouts, then customizing the gadget.
- You can also customize system pages – pages that perform routine functions, such as authentication and event registration.
- For each page on your site, you can control the type of users who can access it.
- When you delete a page or template, it is moved to the trash where it can be restored.
- You can view and restore previous versions of each page.
- The overall look and feel of your site depends on which website theme you choose.
- You can modify the colors and styles of common elements that appear throughout your site.
- For experienced website designers and developers, Wild Apricot provides additional tools for advanced customization and fine-tuning of your Wild Apricot website.

What you should do first

Click/tap to expand/collapse

1. Select your website theme.
2. Create or modify page templates.
3. Create and design your site pages.
4. Set page access and visibility and other page settings.
5. Customize the appearance of your website.

How do you...?

Click/tap to expand/collapse

- Add dynamic content
- Add custom content
- Add and customize layouts
- Add and customize gadgets
- Set up page headers and footers
- Reorder menu options
- Set up custom URLs
- Define meta-tags
- Redirect a page
- Customize system pages
- Upload files to my account
- Extend my site with third-party tools
- Add Wild Apricot functionality to another website
- Use a different domain name
- Track website traffic
- Optimize my site for search engines

Webinar: Setting up and customizing Wild Apricot sites (20:00)

On this page:

- What you need to know
- What you should do first

- How do you...?

Expand all sections

Website themes

Website themes

Website themes determine the overall look of Wild Apricot sites. A default website theme is assigned when you create your Wild Apricot account. You can customize your theme in a variety of ways. To switch to a different theme, select the **Theme** option under the **Website** men u.

What does a theme control?

Website themes control the following elements of your website:

Read more/less

- Default colors, shapes, and shades
- Default site background and background image library
- Text style choices in the content editor (e.g. Heading 1, Heading 2)
- ArtText choices in the content editor (e.g. Site title 1, Page heading 1)
- Customization options that appear on the Colors and Styles screen
- Menu location (vertical or horizontal) and whether the menu is static or dynamic (flyout)
- Orientation of the log in form gadget (horizontal or vertical)
- Matching visual styles in online forms
- Master layouts

Available themes

To view samples of the available website themes, click here.

Switching themes

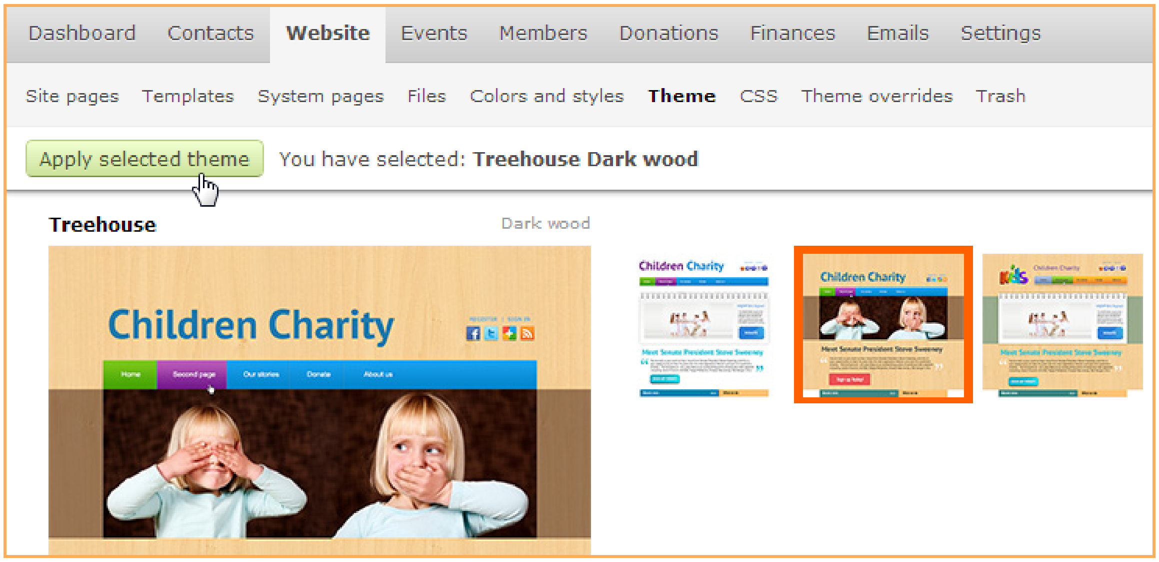
A default website theme is assigned to your site when you first create your Wild Apricot account. You can, at any time, switch to a different theme.

Read more/less

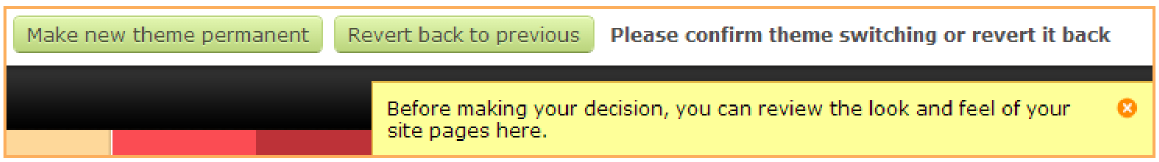
You can choose from a number of professionally designed themes in a variety of styles and colors.

> When you switch to a different theme, permanent changes are made to your web pages. As well, a different set of master layouts and page templates becomes available as the basis for individual site pages. As a result, layouts and gadgets may change position within your pages. Also, all theme overrides and any customizations made on the Colors and styles screen will be discarded. Switching back to the previous theme may not restore your site to its previous appearance. You might consider asking Wild Apricot Support to create a clone of your current site so you can test your changes on the clone site.

To change your website theme, select the **Theme** option under the **Website** menu. Within the theme gallery that appears, click the theme you want to use then click the **Apply selected theme** button. The themes are grouped into theme packs according to their layout and design.



After you click **Apply selected theme**, you will be asked to confirm your selection before the change is applied. Then, you will be taken to a site page where selected theme can be previewed. From here, you can make the change permanent or revert back to your previous website theme.



> ⚠ You should carefully review your site before making your decision. After you make the theme change permanent, switching back to the previous theme may not restore your site to its previous appearance.

When you switch themes, one or more pages may be added to your site to illustrate various theme-specific content and styles.

Testing themes using a cloned site

If you want to explore a different website theme without altering your current site, you can ask Wild Apricot Support to create a clone of your current site.

Read more/less

The cloned site functions as a sandbox where you can evaluate a theme and run tests, but it is **not** an exact copy of your site, and any changes you make to the cloned site cannot be copied over to your existing site.

There are a number of differences between your existing site and the cloned site:

- Only one full administrator is copied.
- Only the first 3 events are copied.
- Financial data, email logs etc. will not be copied.
- The cloned site is set as a free Trial account for 30 days so you may encounter different restrictions from your existing site.

> ⚠ **Remember:** Any changes you make to the cloned site will not be automatically applied to the original site; you will need to manually recreate these changes on your existing site.

Customizing themes

After selecting and applying a website theme, you can customize your theme in a number of ways.

Read more/less

- From the Colors and Styles screen, you can change the colors and fonts of elements within the theme. For example, you can change the appearance of menus, links, headings, body text, and forms, among other elements.
- Using CSS customizations, you can change the styles that determine the appearance of text elements within your theme.

- Using theme overrides, you can replace or override the theme files that control the appearance of the current theme. Typically, your override files will include code to customize a feature or element of your theme.

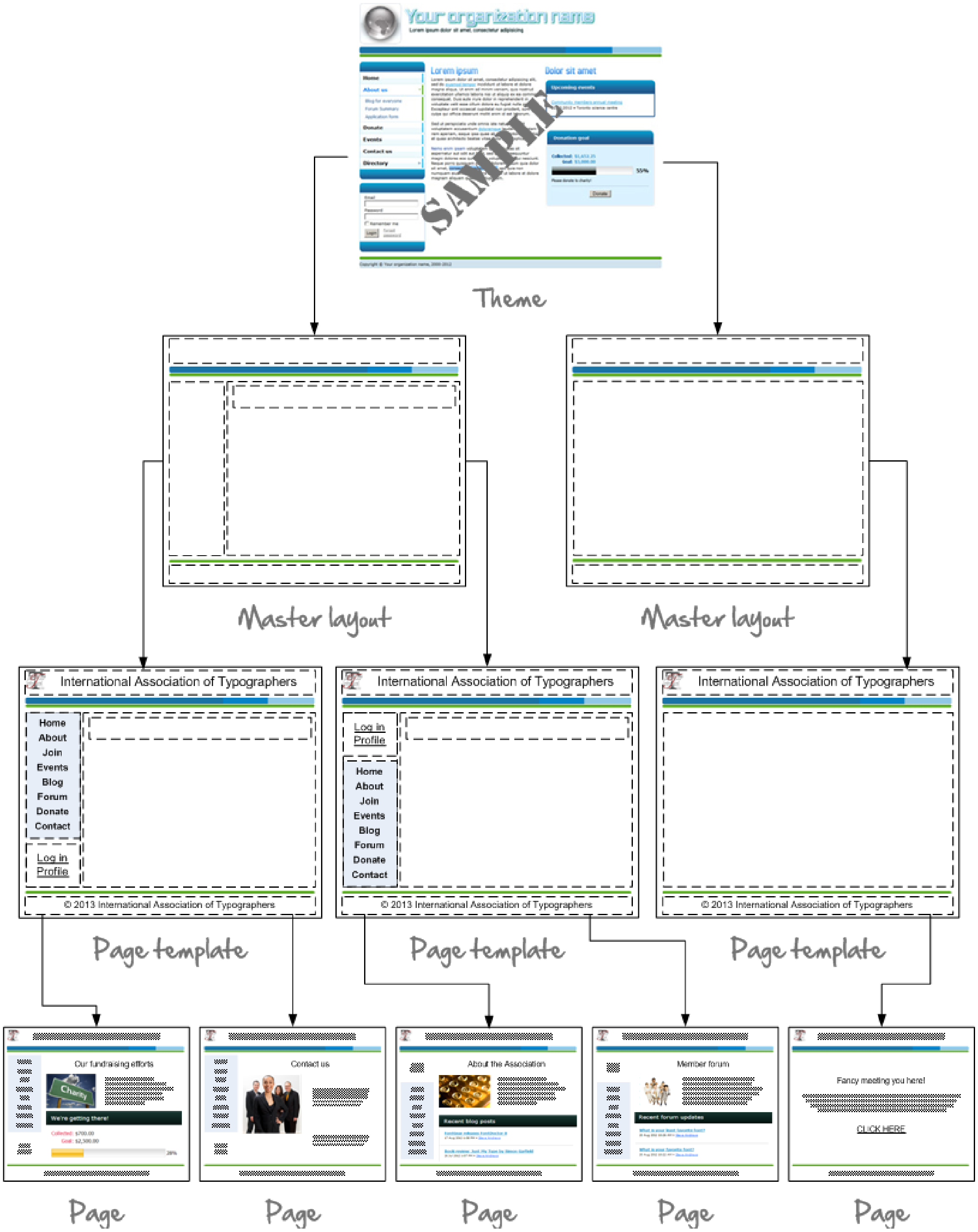
> Theme overrides are only available for paid billing plans.

Themes, master layouts, and page templates

Each website theme contains a number of different *master layouts* which can form the basis of any number of different page templates.

Read more/less

A master layout provides a broad outline of the page, which the page template can refine. Master layouts and page templates can also contain graphical elements. All master layouts within a theme share the same look and feel, including color scheme. Different master layouts are available depending on the currently selected theme.



Master layouts are not accessible through a graphical interface but can be modified through theme overrides.

Mobile friendly themes

Wild Apricot's newest theme sets – Bookshelf , Building Blocks, Fiesta, Firma, Homestead, Kaleidoscope, Showcase, Skyline , Terra, Tinted Tiles, and Whiteboard – are fully responsive and mobile friendly. Sites that use these themes automatically adjust their contents to fit properly on different sized screens, including mobile devices.

Read more/less

⚠ When you switch to a different website theme, all theme overrides and any customizations made on the Colors and styles screen will be replaced by the defaults for the new theme. Your overrides and customizations will be restored if you switch back to the previous theme.

Themes that are responsive will appear on the Themes screen with both desktop and mobile thumbnails.

For more information on responsiveness, see Designing responsive pages .

Theme-specific functionality

Some of the newer themes feature theme-specific functionality not available in all themes.

Read more/less

The table summarizes the theme-specific functions.

Area	Function	Theme(s)
Additional gadgets	Secondary menu gadget	Blueprint, Bookshelf, Building Blocks, Fiesta, Firma, Homestead, Kaleidoscope, Showcase, Skyline, Terra, Tinted Tiles, Whiteboard
	Headline	Kaleidoscope
Backgrounds	Static site background (doesn't move as visitors scroll up and down the page)	Firma, Homestead, Skyline
	Transparent gadget backgrounds	Firma, Terra
Fonts and text styles	Font Awesome iconic font	Building Blocks, Clean Lines, Dark Impact, Fiesta, Firma, Homestead, Kaleidoscope, Showcase, Skyline, Terra, Tinted Tiles, Tr eehouse, White Space
	Transparent text styles	Blueprint, Firma, Homestead, Showcase, Skyline, Terra
Gadget styles and options	Alignment option for vertical menu gadgets	Building Blocks, Kaleidoscope, Tinted Tiles
	Alignment option for secondary menu gadgets	Firma, Homestead, Terra

	Fixed position for social profile gadget	Firma, Terra
	Round donation goal styles	Skyline
	Round featured member styles	Skyline
	Round link button styles	Blueprint, Fiesta, Firma, Terra
	Sticky menu style	Firma, Terra
Log in gadgets	Alignment option for log in button gadgets	Building Blocks, Clean Lines, Dark Impact, Firma, Homestead, Kaleidoscope, Showcase, Terra, Tinted Tiles, Treehouse, White Space
	Alignment option for log in form gadgets	Building Blocks, Firma, Homestead, Kaleidoscope, Showcase, Terra, Tinted Tiles, Treehouse
	Control whether the email and password labels appear within the log in form gadget fields, or outside them	All except Business Casual, Granite
	Dropdown login form	Building Blocks, Firma, Kaleidoscope, Showcase, Skyline, Terra, Tinted Tiles
	Hide the **Remember me** and **Forgot password** labels within log in form gadgets	All except Business Casual, Granite
	Orientation option for log in form gadgets	All except Business Casual, Granite
Mobile	Mobile panel	Building Blocks, Firma, Kaleidoscope, Terra, Tinted Tiles
	Hide pictures in mobile view	Firma, Terra
	Responsive	Bookshelf, Building Blocks, Clean Lines, Dark Impact, Fiesta, Firma, Homestead, Kaleidoscope, Showcase, Skyline, Terra, Tinted Tiles, Treehouse, Whiteboard, White Space
Page templates	Sticky placeholder	Blueprint, Fiesta, Homestead

Support for older themes

Wild Apricot is no longer supporting a number older website themes, allowing us to focus our development and testing efforts on newer, more responsive themes.

Read more/less

The older themes that we are no longer supporting are:

- Aurora horizontal/hybrid
- Basic
- Blueprint
- Classic
- Clean Lines
- Clouds
- Dark
- Dark Impact
- Glass
- Granite
- Keynote
- Modern

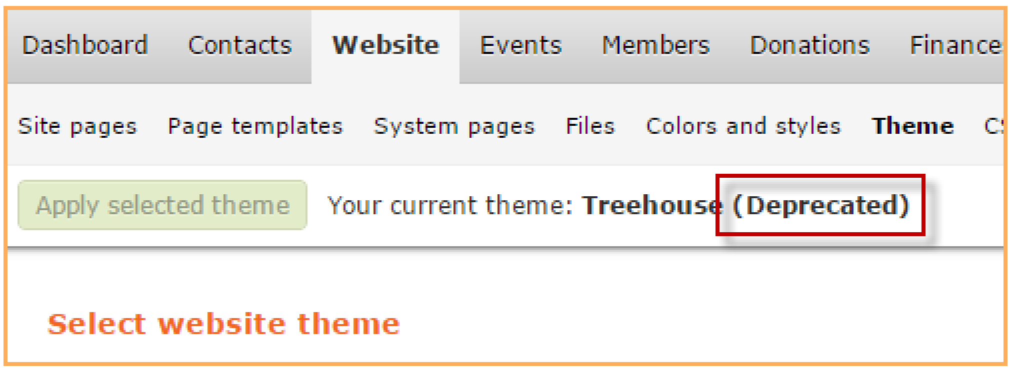
- Memo
- Nature
- Notebook
- Transparent
- Treehouse
- White Space

What do we mean by not supporting?

We mean:

- We won't be testing new features to make sure they work properly with these themes
- These themes will longer appear as options within the website theme gallery
- If you switch from an older theme that is no longer supported, you will not be able to switch back to it later

If you are currently using one of these themes, your site will continue to function as before, although new gadgets – or new features for existing gadgets – may not work as expected with these themes. Within the theme selection screen, your theme will appear as *deprecate d* if it is no longer supported.



On this page:

- What does a theme control?
- Available themes
- Switching themes
- Testing themes using a cloned site
- Customizing themes
- Themes, master layouts, and page templates
- Mobile friendly themes
- Theme-specific functionality
- Support for older themes

Expand all sections

See also:

- Page templates
- Designing site pages
- Designing responsive pages
- Managing site pages
- Customizing colors and styles
- CSS customization
- Theme overrides

Blueprint theme set

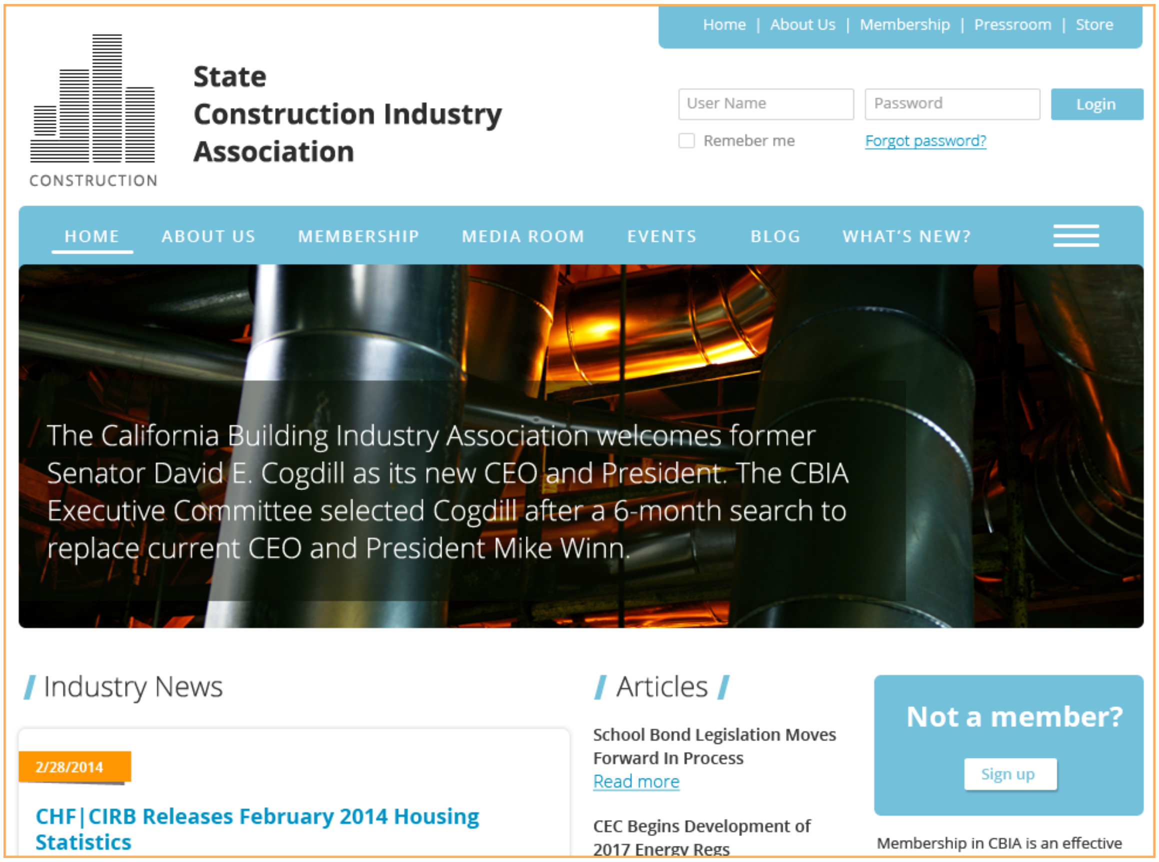
Blueprint theme set

⚠ Wild Apricot is no longer supporting this theme. This means:

- We won't be testing new features to make sure they work properly with this theme

- This theme will longer appear as an option within the website theme gallery
- If you switch from this theme to another theme, you will not be able to switch back to it later

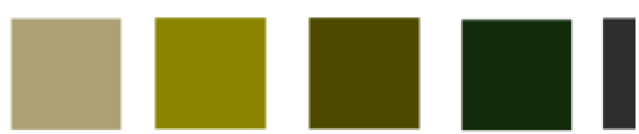
The Blueprint theme set is part of a series of themes designed for business and trade associations. Though designed with construction-related organizations in mind, Blueprint themes can be used by any type of organization, particularly if you want to take advantage of its theme-specific functionality (see below).



Themes within the Blueprint theme set

The Blueprint theme set consists of the following website themes:

Read more/less

Theme name	Theme colors
Waterfront	
Industrial Park	

Financial District	

Design elements

The Blueprint theme set is based on the Fiesta theme set (formerly Food Service) while expanding and improving upon it.

Read more/less

The Blueprint theme has a simple but modern design featuring rounded edges and shadows, a lot of space, and a hint of depth.

The Promo text style features a transparent background that displays well on top of background graphics, and placeholders – used to define the areas within page templates where content can be placed – with drop shadows for a clean yet dramatic effect.

For a modern look, we chose OpenSans as the base font for this theme set, and built our design around it.

Theme-specific functionality

Blueprint themes provide theme-specific functionality, including:

Read more/less

- Secondary menu gadget
- Ability to hide the **Remember me** and **Forgot password** labels within log in form gadgets, and control whether the email and password labels appear within the entry fields, or outside them
- Sticky placeholder to create a non-scrolling area at the top of the page or within the sidebar – perfect for sticky menus
- Button style to display a link as a round button
- Promo text style with transparent background
- Ability to control the colors and styles of elements within the upcoming events gadgets, recent blog posts gadgets, and forum updates gadgets.

Customizing Blueprint themes

From the Colors and styles screen, you can customize the colors, fonts, styles, and backgrounds of various elements that appear throughout your site. When customizing the colors and styles of Blueprint themes, you can customize elements within each gadget, including upcoming events gadgets, recent blog posts gadgets, and forum updates gadgets. For details, see Color and style settings for Blueprint themes.

You can also customize Blueprint themes using CSS and theme overrides.

On this page:

Expand all sections

See also:

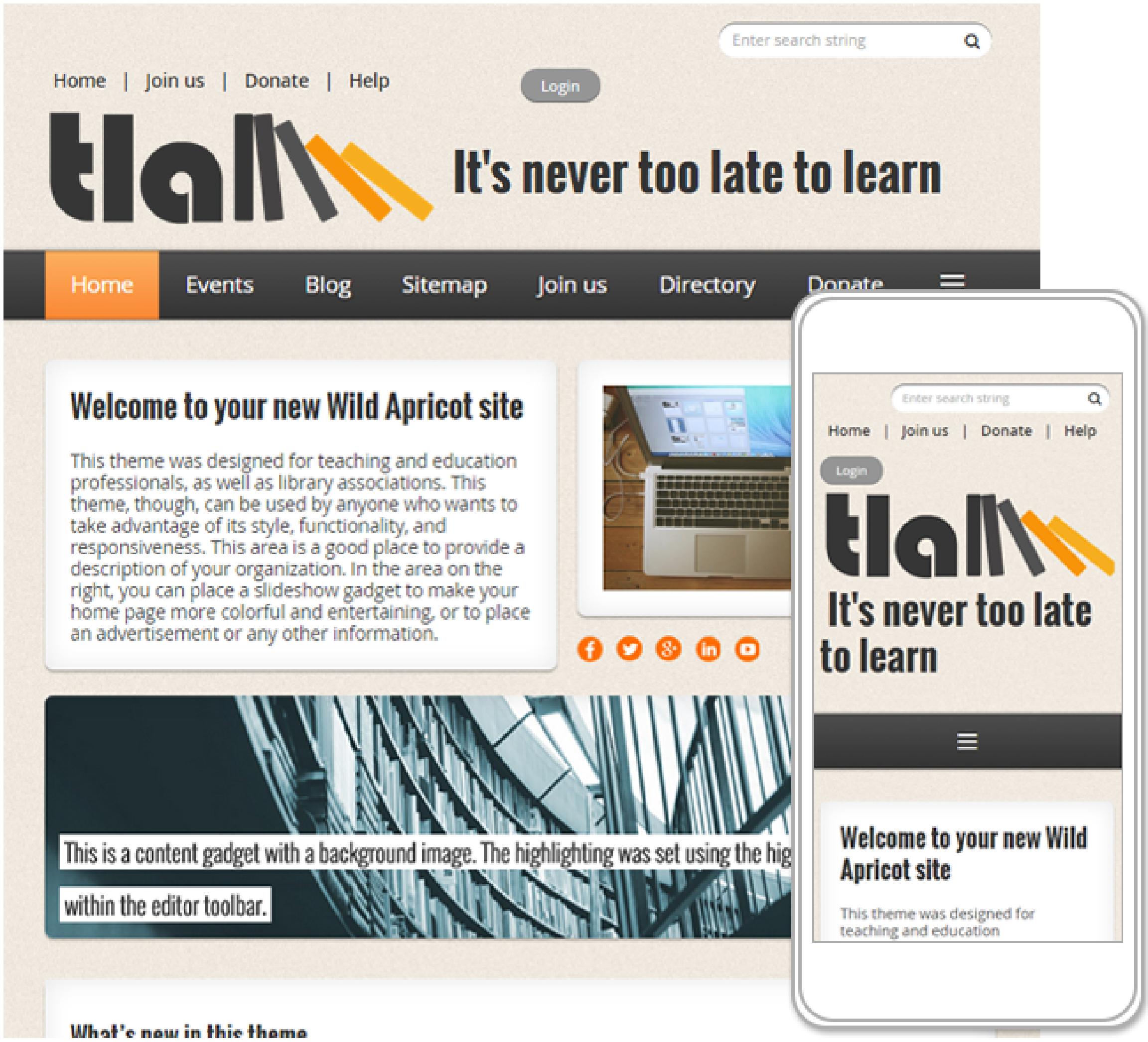
- Website themes
- Color and style settings for Blueprint themes

Bookshelf theme set

Bookshelf theme set

The themes in the Bookshelf theme set are fully responsive and mobile friendly. Like the simpler and more easily customized Whiteboard the mes, Bookshelf themes scale down automatically to different screen sizes.

The Bookshelf theme set is part of a series of themes designed for business and trade associations. Though designed with library and teacher associations in mind, Bookshelf themes can be used by any type of organization, particularly if you want to take advantage of its responsiveness and its theme-specific functionality (see below).

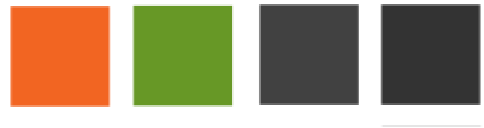
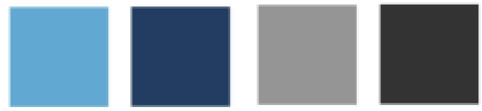


Themes within the Bookshelf theme set

The Bookshelf theme set consists of the following website themes:

Read more/less

Theme name	Theme colors
Almanac	
Science fiction	

Storybook	
Textbook	

Responsiveness

By default, responsiveness is enabled in all Bookshelf themes. You can, however, disable the responsive behavior using theme overrides.

Read more/less

With responsiveness enabled, gadgets will be stacked within a single column on mobile devices, and resized to match the device's screen width. A mobile version of the site menu will be displayed, with a limit of 3 levels in total (main menu plus 2 submenu levels). Only horizontal menus are available for responsive themes.

To disable responsive behavior within Bookshelf themes, follow these steps:

1. Enable theme overrides (if you have not done so already).
2. Click the link to download the theme files.
3. Unzip the theme files to a location of your choice on your computer or network.
4. Using a text editor, open the **basic.responsive.grid.less** file from the **Styles** folder.
5. Replace the following lines...

```
@state2-minwidth: 600px;
@state2-maxwidth: 959px;

@state3-maxwidth: 616px;
```

with...

```
@state2-minwidth: 0px;
@state2-maxwidth: 0px;

@state3-maxwidth: 0px;
```

6. Upload the modified **basic.responsive.grid.less** file to the **Styles** theme folder on your site via File management or WebDAV.
7. Click the **Rebuild theme** button on the **Theme overrides** screen.

The site will now appear the same regardless of device size.

Design elements

The Bookshelf theme has a simple but modern design featuring rounded edges and shadows. The selection of gadget styles has been considerably expanded, particularly for donation goal gadgets. For a modern look, we chose OpenSans as the base font, and Oswald as the font for headings.

Theme-specific functionality

Bookshelf themes provide theme-specific functionality, including:

Read more/less

- Secondary menu gadget
- Ability to hide the **Remember me** and **Forgot password** labels within log in form gadgets, and control whether the email and password labels appear within the entry fields, or outside them
- Expanded selection of gadget styles

- Theme-specific styles for slideshow gadget s
- Theme-specific menu styles
- Ability to control the colors and styles of elements within the upcoming events gadgets, recent blog posts gadgets, and forum updates gadgets through the Typography settings.

Customizing Bookshelf themes

From the Colors and styles screen, you can customize the colors, fonts, styles, and backgrounds of various elements that appear throughout your site. For details, see Color and style settings for Bookshelf and Whiteboard themes.

You can also customize Bookshelf themes using CSS and theme overrides .

On this page:

Expand all sections

See also:

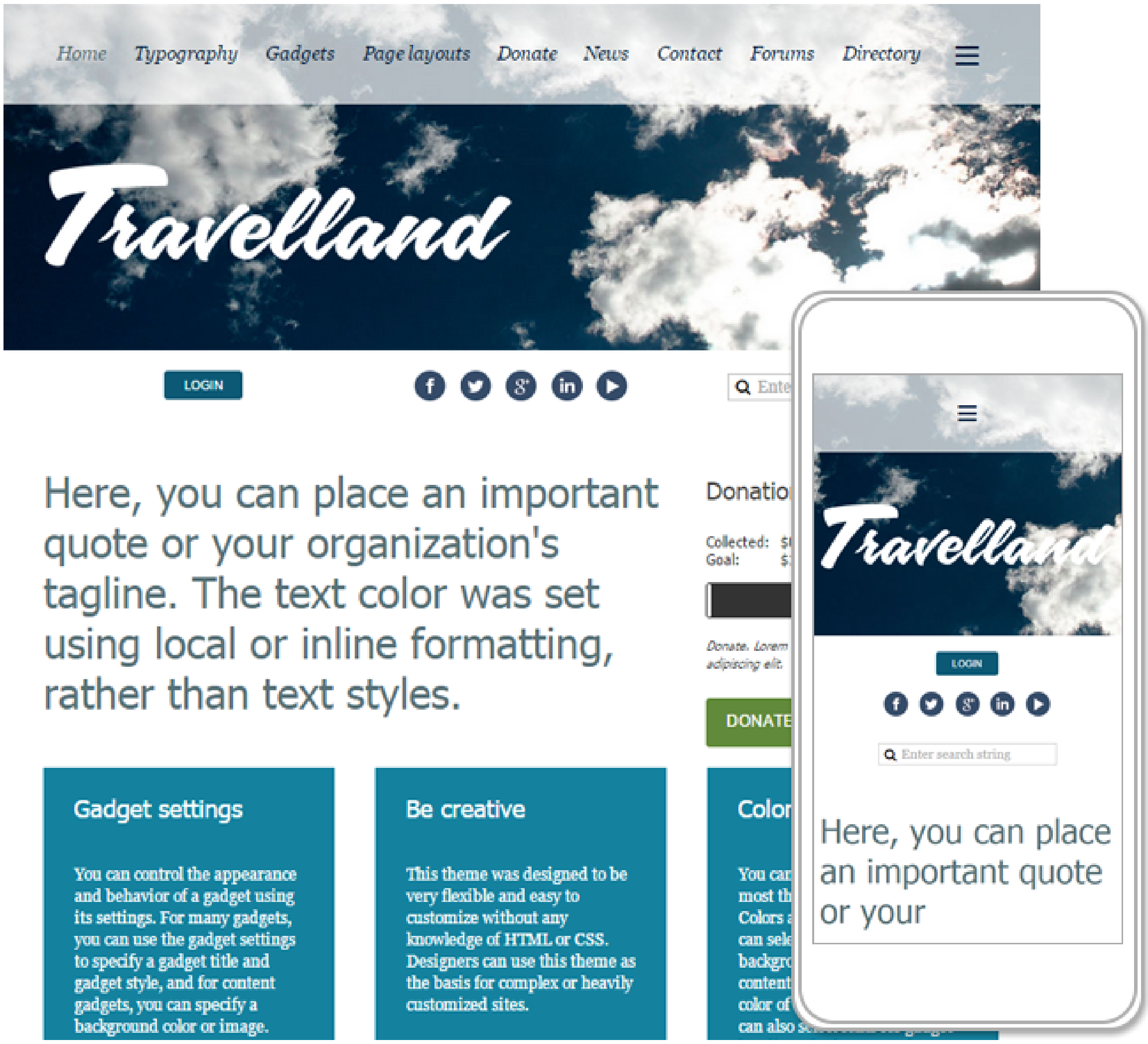
- Website themes
- Color and style settings for Bookshelf and Whiteboard themes

Clean Lines theme set

Clean Lines theme set

> The themes in the new Clean Lines theme set are fully responsive and mobile friendly. This version supersedes the non-responsive version that was released earlier and is now being deprecated.

The Clean Lines theme set provides an excellent starting point for designers and others who want to completely customize their website. Available in a variety of colors and designs, these themes are fully responsive and mobile friendly.



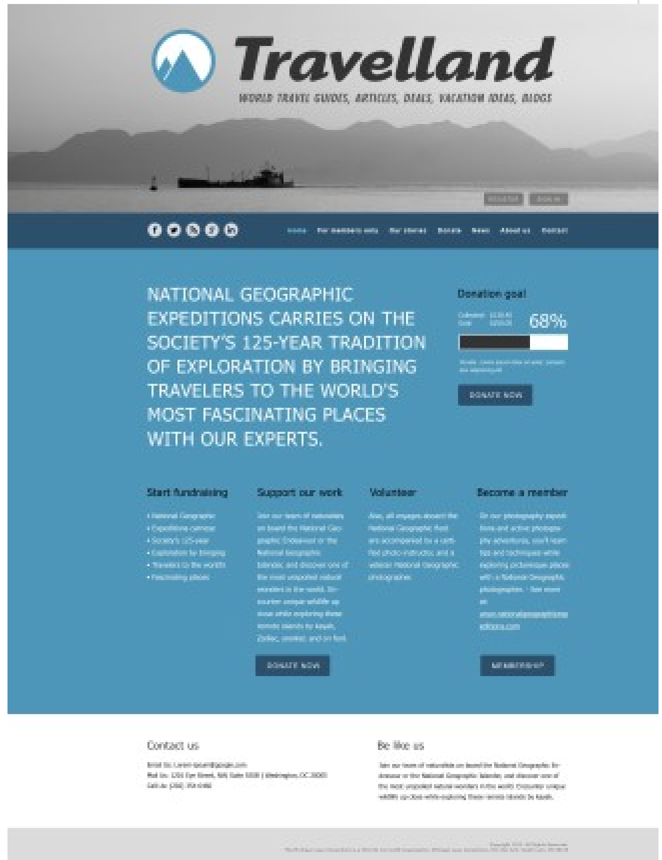
Themes within the theme set

The Clean Lines theme set consists of the following website themes:

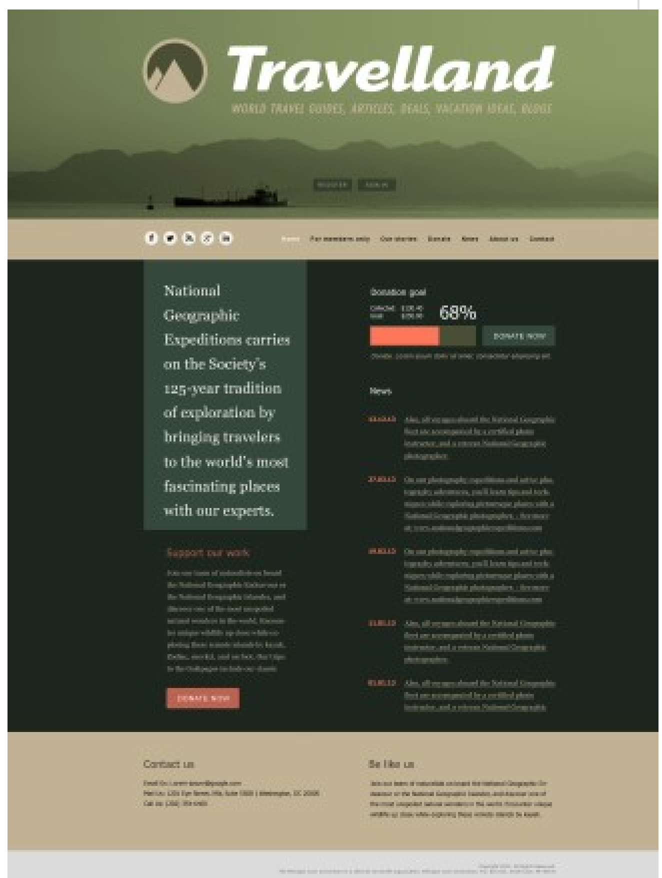
Read more/less

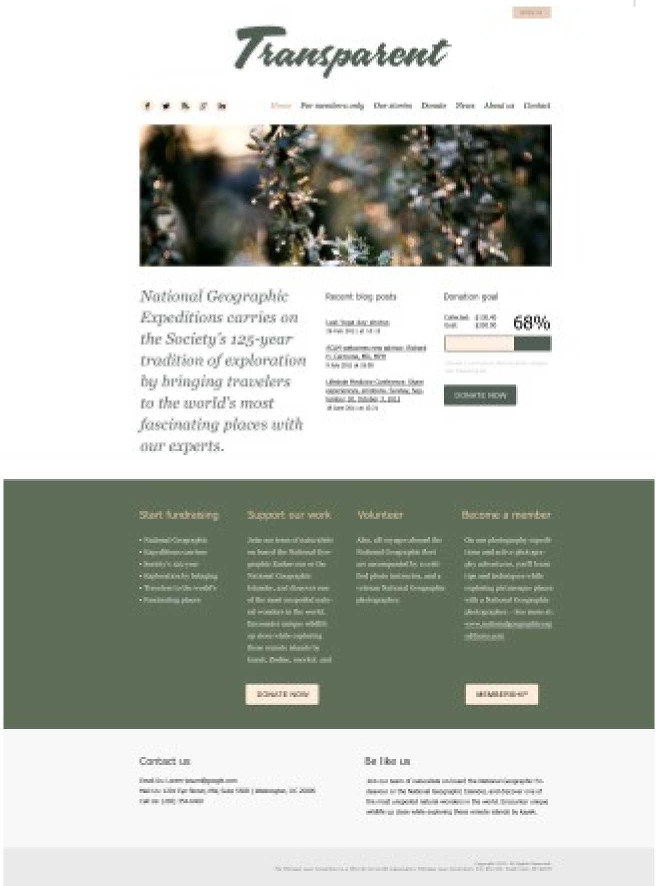
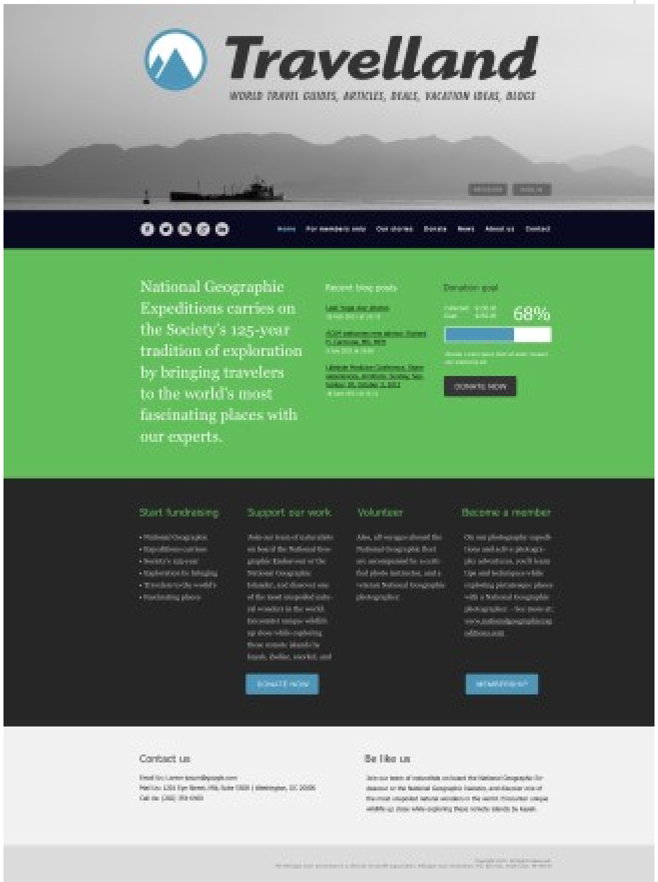
Theme name	Preview

Blue Haze



Green Night



White Light	
Marine Green	

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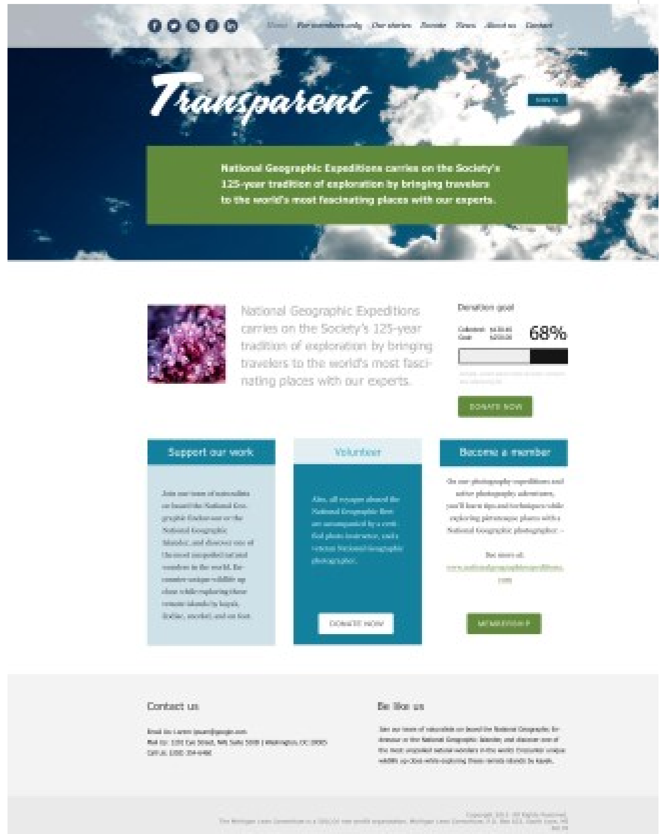
<td>
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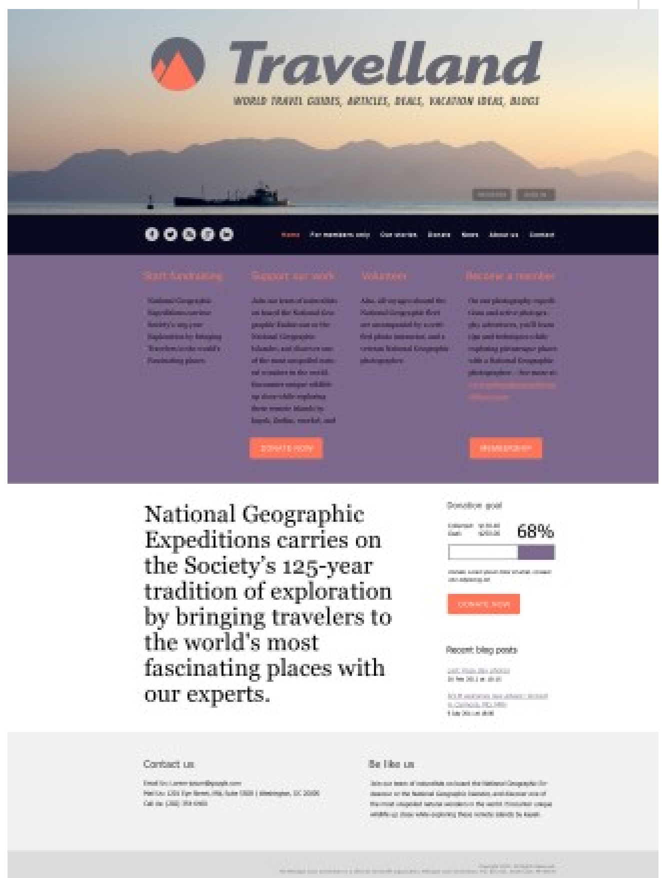
<tr>
<td>Purple Twilight</td>
<td>
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</tr>
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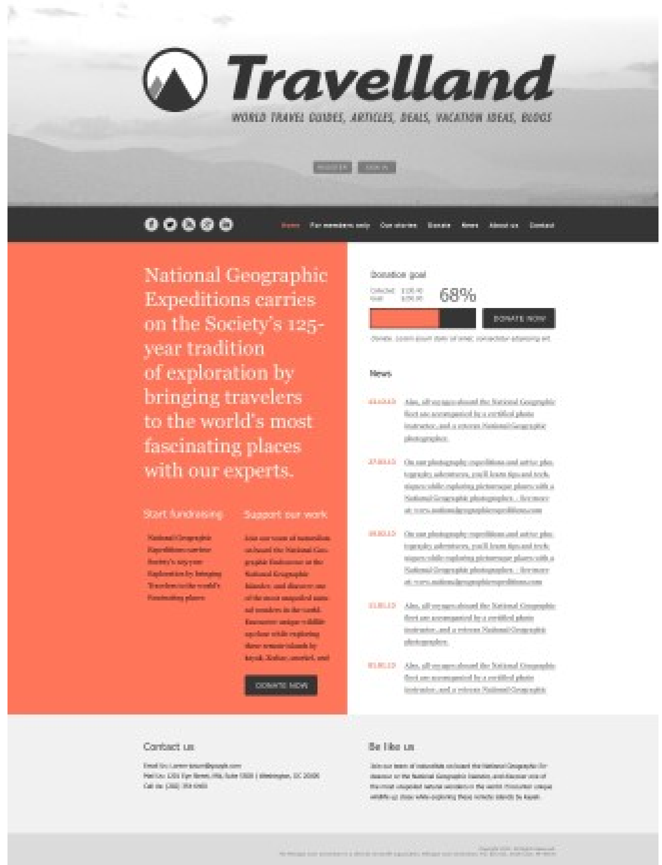
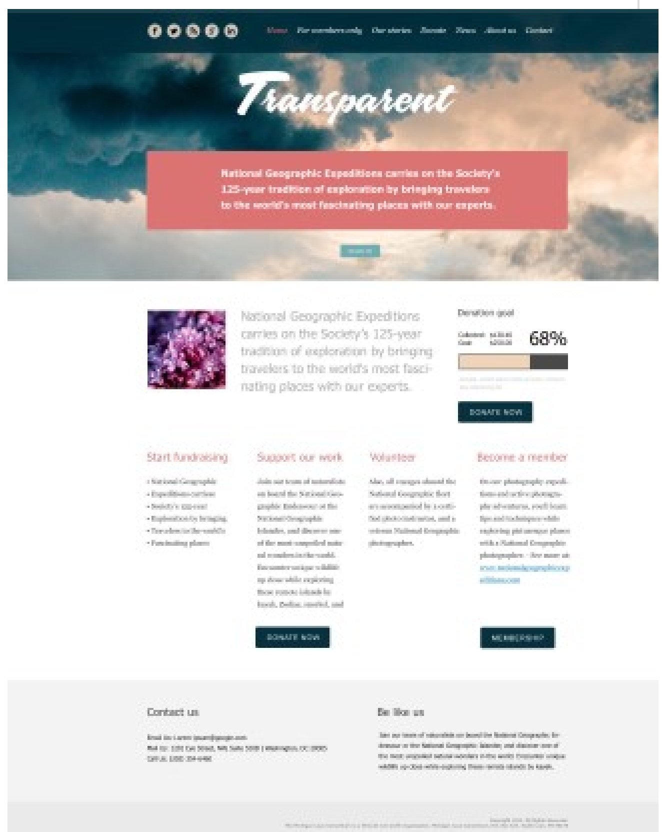
Black & Salmon	
Pink Sky	

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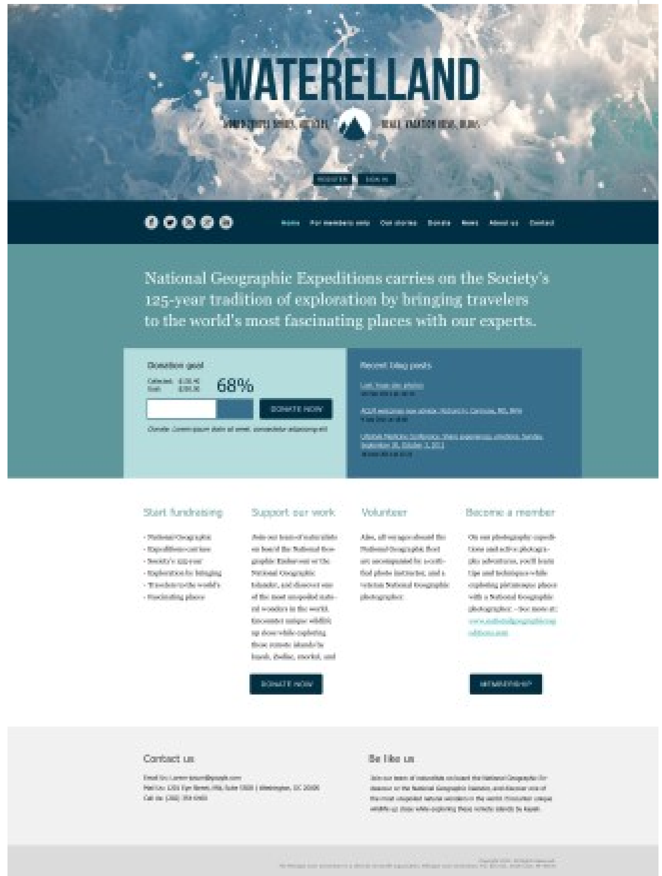
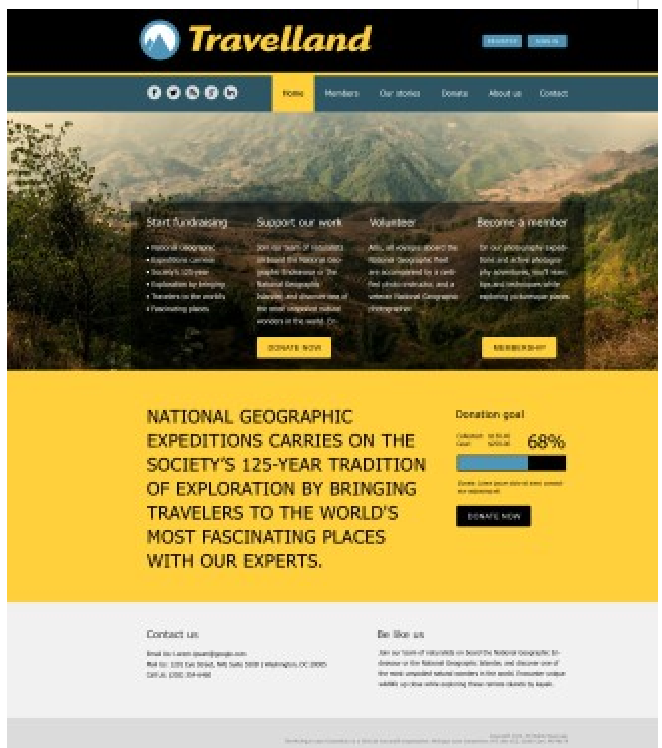
<tr><td>Blue Splash</td><td>
</td></tr>
<tr><td>Yellow Reverse</td><td>
</td></tr>
</table>

Responsiveness

By default, responsiveness is enabled in all Clean Lines themes (excluding the deprecated Clean Lines themes). You can, however, disable the responsive behavior using theme overrides.

Read more/less

With responsiveness enabled, gadgets will be stacked within a single column on mobile devices, and resized to match the device's screen width. A mobile version of the site menu will be displayed, with a limit of 3 levels in total (main menu plus 2 submenu levels). Only horizontal menus are available for responsive themes.

To disable responsive behavior within Clean Lines themes, follow these steps:

1. Enable theme overrides (if you have not done so already).
2. Click the link to download the theme files.
3. Unzip the theme files to a location of your choice on your computer or network.
4. Using a text editor, open the **basic.responsive.grid.less** file from the **Styles** folder.
5. Replace the following lines...

```
@state2-minwidth: 600px;
@state2-maxwidth: 959px;

@state3-maxwidth: 616px;
```

with...

```
@state2-minwidth: 0px;
@state2-maxwidth: 0px;

@state3-maxwidth: 0px;
```

6. Upload the modified **basic.responsive.grid.less** file to the **Styles** theme folder on your site via File management or WebDAV.
7. Click the **Rebuild theme** button on the **Theme overrides** screen.

The site will now appear the same regardless of device size.

Design elements

Clean Lines, together with the Dark Impact and White Space themes, forms part of a suite of simple themes that are flexible and easy to customize.

Read more/less

All of the simple theme sets provide a clear and modern look, with a single screen-wide background image that gives each site its signature look. The focus of the Clean Lines set is on providing a variety of colorful themes to choose from.

The typography of the theme is classic, with Tahoma and Georgia fonts used across all theme variations.

Theme-specific functionality

Clean Lines themes provide theme-specific functionality, including:

Read more/less

- Alignment options for social profile and log in button gadgets
- Orientation option – horizontal and vertical – for log in form gadgets
- Font Awesome iconic font set for adding icons you can easily size and color
- Background color setting for functional buttons appearing on system gadgets and singular gadgets – e.g. Post, Next, Cancel, Register, Confirm

Customizing Clean Lines themes

From the Colors and styles screen, you can customize the colors, fonts, styles, and backgrounds of various elements that appear throughout your site. For details, see Color and style settings for Clean Lines, White Space, Dark Impact themes.

You can also customize Clean Lines themes using CSS and theme overrides .

On this page:

- Responsiveness
- Design elements
- Theme-specific functionality
- Customizing Clean Lines themes

Expand all sections

See also:

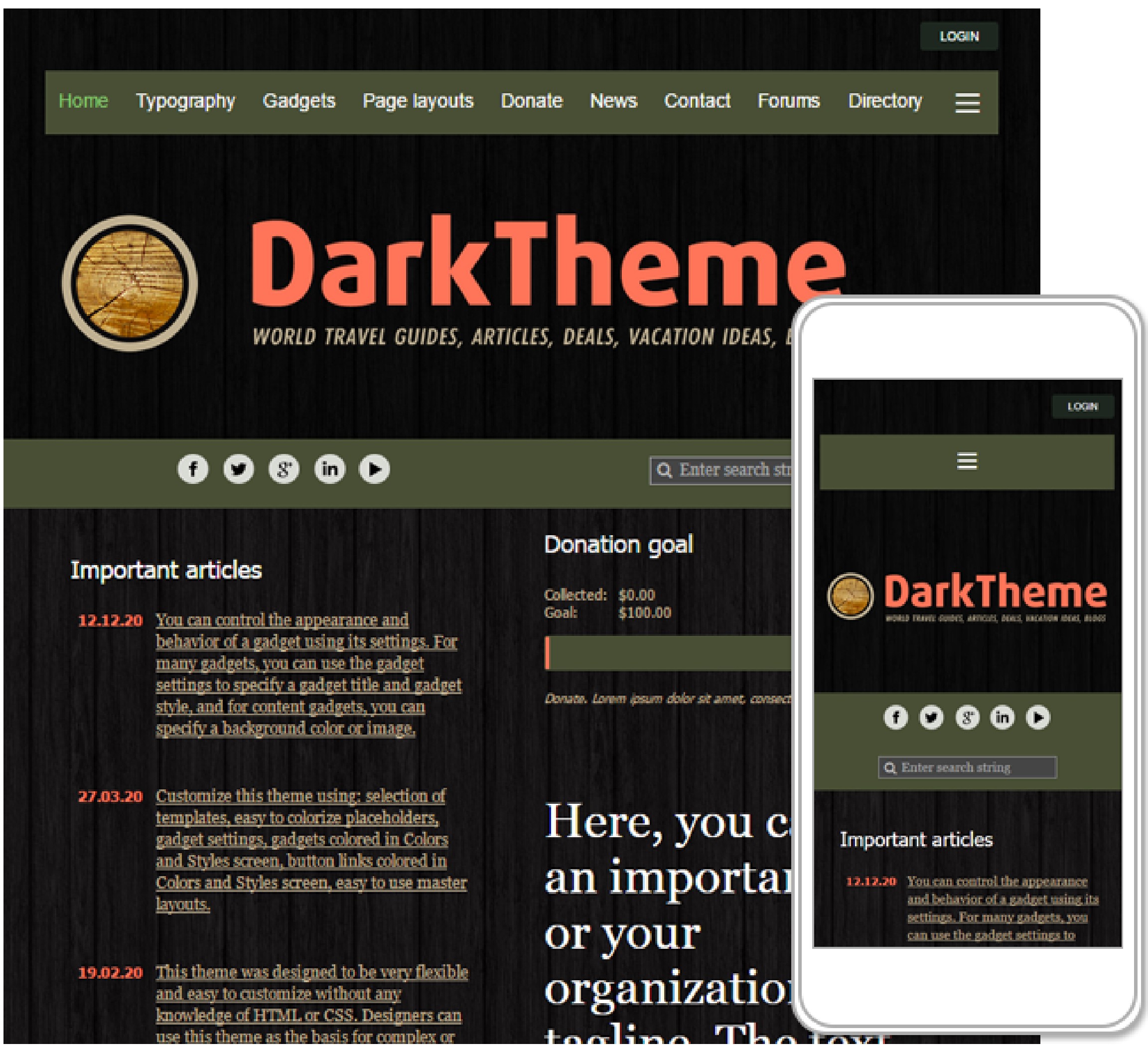
- Website themes
- Color and style settings for Clean Lines, White Space, Dark Impact themes

Dark Impact theme set

Dark Impact theme set

> The themes in the new Dark Impact theme set are fully responsive and mobile friendly. This version supersedes the non-responsive version that was released earlier and is now being deprecated.

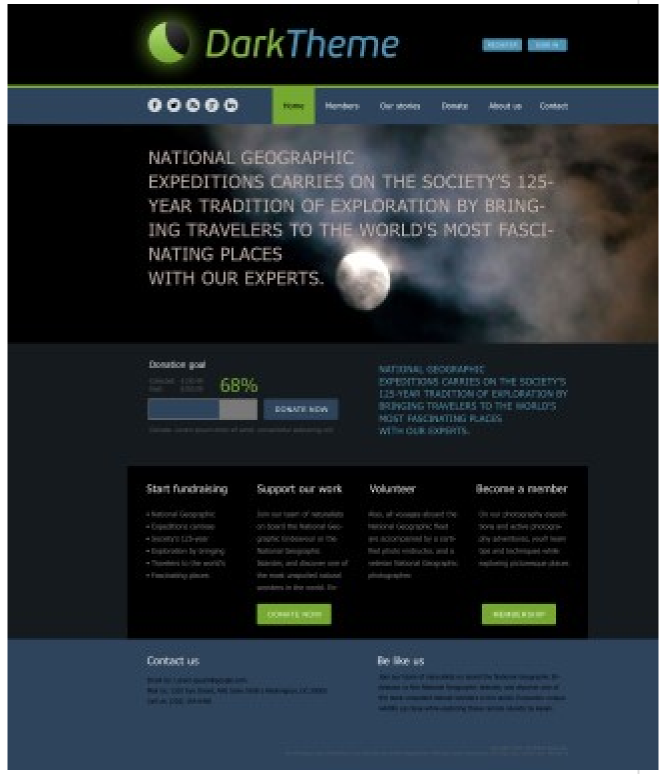
The Dark Impact theme set provides an excellent starting point for designers and others who want to completely customize their website. Available in a variety of dark colors and designs, these themes are fully responsive and mobile friendly.

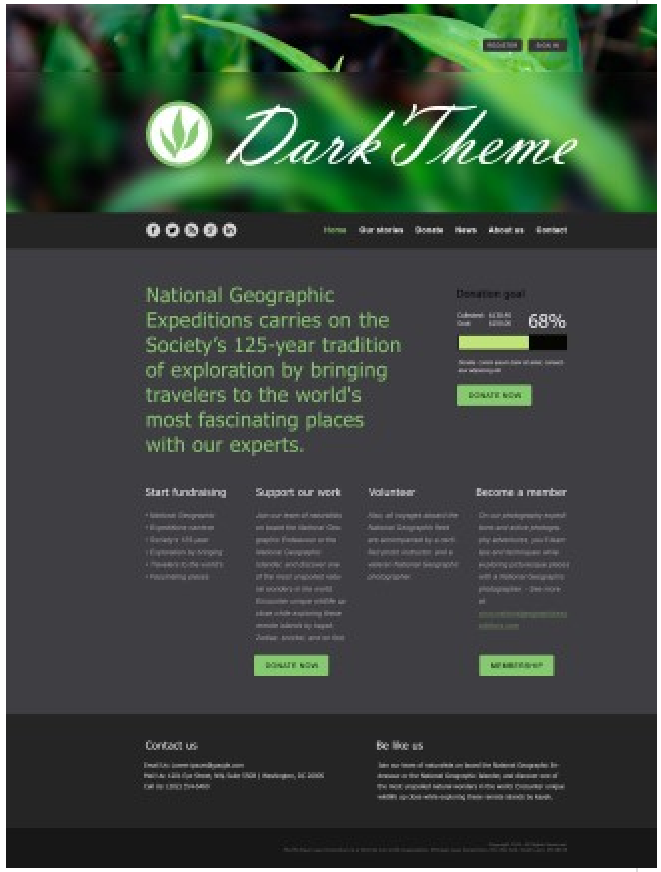
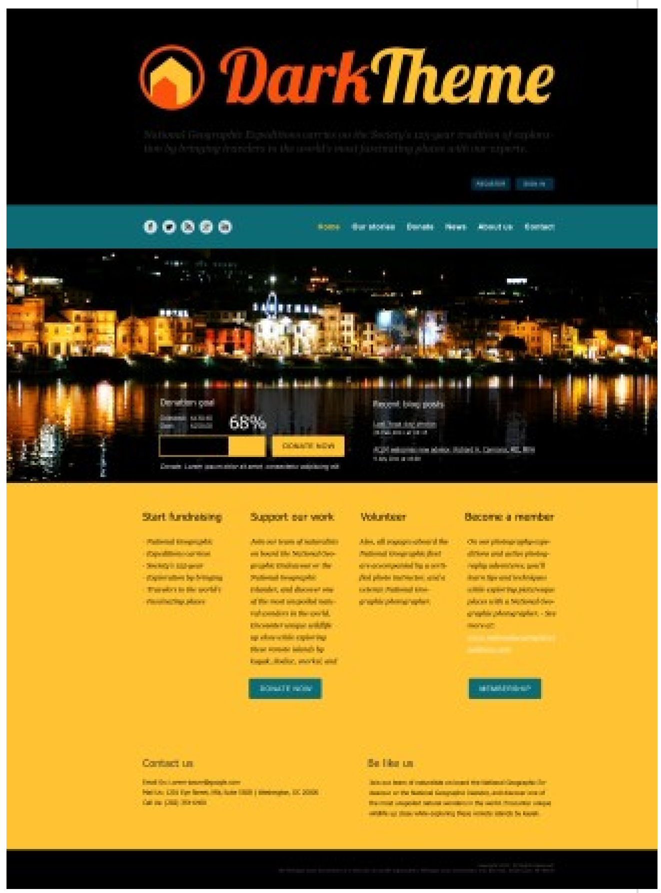


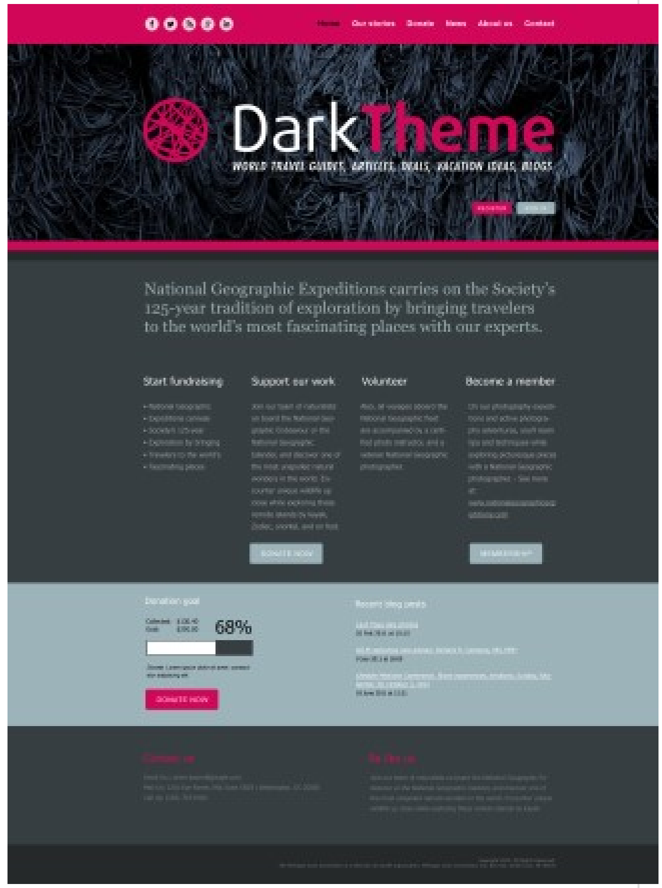
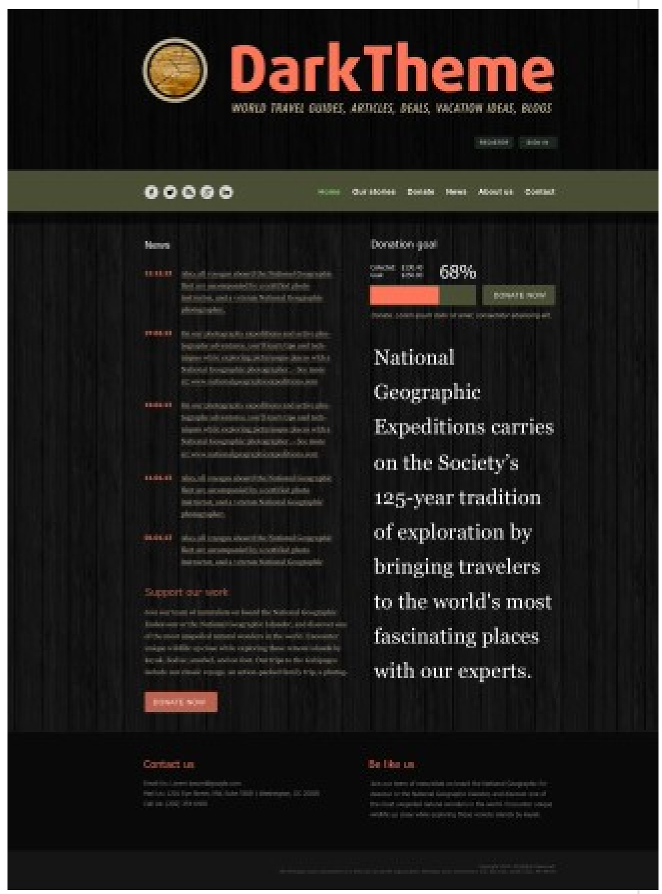
Themes within the theme set

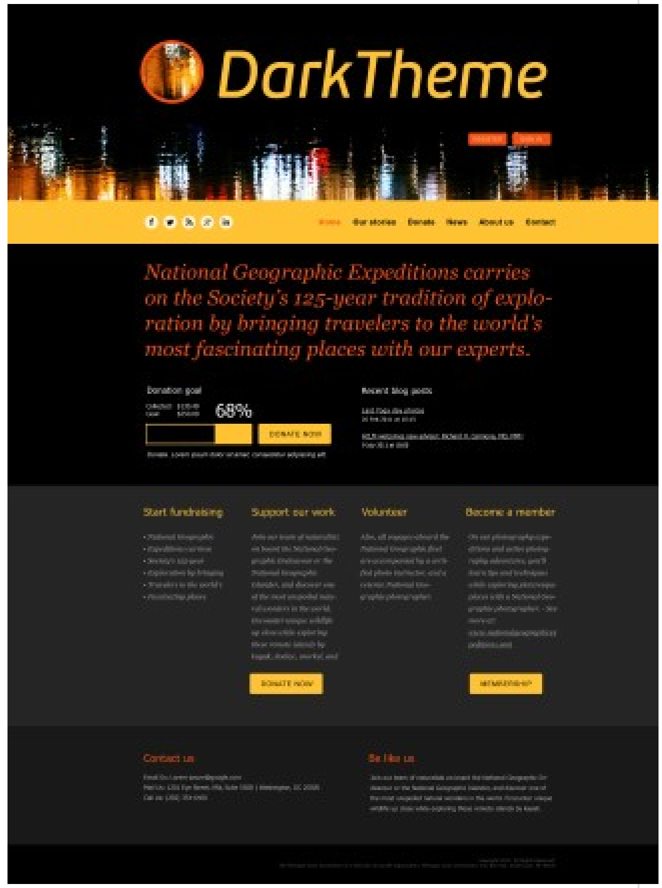
The Dark Impact theme set consists of the following website themes:

Read more/less

<table>
<tr><th>Theme name</th><th>Preview</th></tr>
<tr><td>Blue Moon</td><td>
</td></tr>
</table>

Summer Garden	
Nightscape	

Magenta Graphic	
Barnboard	

Night Fire	

Responsiveness

By default, responsiveness is enabled in all Dark Impact themes (excluding the deprecated Dark Impact themes). You can, however, disable the responsive behavior using theme overrides.

Read more/less

With responsiveness enabled, gadgets will be stacked within a single column on mobile devices, and resized to match the device's screen width. A mobile version of the site menu will be displayed, with a limit of 3 levels in total (main menu plus 2 submenu levels). Only horizontal menus are available for responsive themes.

To disable responsive behavior within Dark Impact themes, follow these steps:

1. Enable theme overrides (if you have not done so already).
2. Click the link to download the theme files.
3. Unzip the theme files to a location of your choice on your computer or network.
4. Using a text editor, open the **basic.responsive.grid.less** file from the **Styles** folder.
5. Replace the following lines...

```
@state2-minwidth: 600px;
@state2-maxwidth: 959px;

@state3-maxwidth: 616px;
```

with...

```
@state2-minwidth: 0px;
@state2-maxwidth: 0px;

@state3-maxwidth: 0px;
```

6. Upload the modified **basic.responsive.grid.less** file to the **Styles** theme folder on your site via File management or WebDAV.
7. Click the **Rebuild theme** button on the **Theme overrides** screen.

The site will now appear the same regardless of device size.

Design elements

Dark Impact, together with the Clean Lines and White Space themes, forms part of a suite of simple themes that are flexible and easy to customize.

Read more/less

All of the simple theme sets provide a clear and modern look, with a single screen-wide background image that gives each site its signature look. The focus of the Dark Impact set is on providing inverted designs that combine dark backgrounds with bright typography.

The typography of the theme is classic, with Tahoma and Georgia fonts used across all theme variations.

Theme-specific functionality

Dark Impact themes provide theme-specific functionality, including:

Read more/less

- Alignment options for social profile and log in button gadgets
- Orientation option – horizontal and vertical – for log in form gadgets
- Font Awesome iconic font set for adding icons you can easily size and color
- Background color setting for functional buttons appearing on system gadgets and singular gadgets – e.g. Post, Next, Cancel, Register, Confirm

Customizing Dark Impact themes

From the Colors and styles screen, you can customize the colors, fonts, styles, and backgrounds of various elements that appear throughout your site. For details, see Color and style settings for Clean Lines, White Space, Dark Impact themes.

You can also customize Dark Impact themes using CSS and theme overrides .

On this page:

Expand all sections

See also:

- Website themes
- Color and style settings for Clean Lines, White Space, Dark Impact themes

Fiesta theme set

Fiesta theme set

The themes in the new Fiesta theme set are fully responsive and mobile friendly. This version supersedes the non-responsive versions that was released earlier and is now being deprecated.

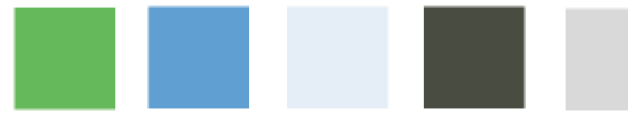
The Fiesta theme set is part of a series of themes designed for business and trade associations. Though designed with food service organizations in mind, Fiesta themes can be used by any type of organization, particularly if you want to take advantage of its responsiveness, its color schemes, or its theme-specific functionality (see below).

Themes within the theme set

The Fiesta theme set consists of the following website themes:

Read more/less

Theme name	Theme colors
Surf 'n' Turf	
Garden Salad	

Wild Rice	

Design elements

The Fiesta theme set is based on the Simple theme set – which consists of the Clean Lines, White Space, and Dark Impact themes – while expanding and improving upon it.

Read more/less

Within the Fiesta theme set, placeholders – used to define the areas within page templates where content can be placed – feature drop shadows for a clean yet dramatic effect.

For a more modern look, we chose OpenSans as the base font for this theme set, and built our design around it.

Responsiveness

By default, responsiveness is enabled in Fiesta themes (excluding the deprecated Fiesta themes). You can, however, disable the responsive behavior using theme overrides.

Read more/less

With responsiveness enabled, gadgets will be stacked within a single column on mobile devices, and resized to match the device's screen width. A mobile version of the site menu will be displayed, with a limit of 3 levels in total (main menu plus 2 submenu levels). Only horizontal menus are available for responsive themes.

To disable responsive behavior within Fiesta themes, follow these steps:

1. Enable theme overrides (if you have not done so already).
2. Click the link to download the theme files.
3. Unzip the theme files to a location of your choice on your computer or network.
4. Using a text editor, open the **layout.less** file from the **Styles** folder.
5. Replace the following lines...

```
@state2-minwidth: 600px;
@state2-maxwidth: 959px;

@state3-maxwidth: 616px;
```

with...

```
@state2-minwidth: 0px;
@state2-maxwidth: 0px;

@state3-maxwidth: 0px;
```

6. Upload the modified **layout.less** file to the **Styles** theme folder on your site via File management or WebDAV.
7. Click the **Rebuild theme** button on the **Theme overrides** screen.

The site will now appear the same regardless of device size.

Theme-specific functionality

Fiesta themes provide theme-specific functionality, including:

Read more/less

- Secondary menu gadget
- Ability to hide the **Remember me** and **Forgot password** labels within log in form gadgets, and control whether the email and password labels appear within the entry fields, or outside them
- Sticky placeholder to create a non-scrolling area at the top of the page or within the sidebar – perfect for sticky menus

- New button style to display a link as a round button
- Font Awesome iconic font set for adding icons you can easily size and color
- Background color setting for functional buttons appearing on system gadgets and singular gadgets – e.g. Post, Next, Cancel, Register, Confirm

Customizing Fiesta themes

From the Colors and styles screen, you can customize the colors, fonts, styles, and backgrounds of various elements that appear throughout your site. When customizing the colors and styles of Fiesta themes, you can customize elements within each gadget, including upcoming events gadgets, recent blog posts gadgets, and forum updates gadgets. For details, see Color and style settings for Fiesta themes.

You can also customize Fiesta themes using CSS and theme overrides.

On this page:

Expand all sections

See also:

- Website themes
- Color and style settings for Fiesta themes

Fiesta theme set (deprecated)

Fiesta theme set (deprecated)

> This theme set has been deprecated – it has been superseded by a newer responsive version. For information on the responsive version, see Fiesta theme set.

The Fiesta theme set is the first in a series of themes designed for business and trade associations. Though designed with food service organizations in mind, Fiesta themes can be used by any type of organization, particularly if you want to take advantage of its theme-specific functionality (see below).

Themes within the theme set

The Fiesta theme set consists of the following website themes:

Read more/less

Theme name	Theme colors
Surf 'n' Turf	
Garden Salad	
Wild Rice	

Design elements

The Fiesta theme set is based on the Simple theme set – which consists of the Clean Lines, White Space, and Dark Impact themes – while expanding and improving upon it.

Read more/less

Within the Fiesta theme set, placeholders – used to define the areas within page templates where content can be placed – feature drop shadows for a clean yet dramatic effect.

For a more modern look, we chose OpenSans as the base font for this theme set, and built our design around it.

Theme-specific functionality

Fiesta themes provide theme-specific functionality, including:
Read more/less

- Secondary menu gadget
- Ability to hide the **Remember me** and **Forgot password** labels within log in form gadgets, and control whether the email and password labels appear within the entry fields, or outside them
- Sticky placeholder to create a non-scrolling area at the top of the page – perfect for sticky menus
- New button style to display a link as a round button

Customizing Fiesta themes

From the Colors and styles screen, you can customize the colors, fonts, styles, and backgrounds of various elements that appear throughout your site. When customizing the colors and styles of Fiesta themes, you can customize elements within each gadget, including upcoming events gadgets, recent blog posts gadgets, and forum updates gadgets. For details, see Color and style settings for Fiesta themes (deprecated).

You can also customize Fiesta themes using CSS and theme overrides.

On this page:

Expand all sections

See also:

- Website themes
- Color and style settings for Fiesta themes (deprecated)

Homestead theme set

Homestead theme set

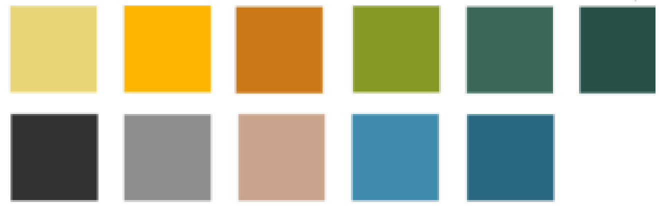
The Homestead theme set is part of a series of themes designed for business and trade associations. Though designed with home building and homeowner associations in mind, Homestead themes can be used by any type of organization, particularly if you want to take advantage of its responsiveness, its theme colors, or its theme-specific functionality (see below).

Themes within the theme set

The Homestead theme set consists of the following website themes:

Read more/less

Theme name	Theme colors
Roman Bricks	
Beechwood	

Painted Hills	
Country Lane	

Design elements

A defining element of the Homestead theme set is its static background which does not move as your visitors scroll up and down the page. Some of the Homestead themes use a single large background image, while others use a repeated background pattern.

Read more/less

You can change the site background from the Colors & styles screen . We recommend using backgrounds with neutral or watercolor palettes to complement the theme colors.

The theme also features a sticky placeholder that you can use within a page template to create a non-scrolling area at the top of your page, perfect for sticky menus. Sticky placeholders are identified in Homestead themes by a **HTML ID** value of *id_Header1*, which you can view within the **Advanced** section of the placeholder settings.

The typography of the Homestead theme set is based on Roboto font headings with neutral colors, and Open Sans base text for better reading experience. An expanded set of headings styles, along with a special Quoted paragraph style, provides a number of options for attractive page designs.

As well, Font Awesome – a font consisting entirely of icons – has been added to the theme. You can add these icons to a content gadget, and modify their color and size directly from the content editor. You can copy and paste icons from the **Theme icons** page, which appears as a sample page when you create a site using this theme, or switch to it. To keep the icons readily available, you might want to keep this page as an admin-only non-menu page. For more information, see Using Font Awesome icons .

Large, rectangular button styles are available for link buttons. A new style has been added to the social profile icon styles, featuring a hand-drawn style and hover effects.

Responsiveness

By default, responsiveness is enabled in all Homestead themes. You can, however, disable the responsive behavior using theme overrides.

Read more/less

With responsiveness enabled, gadgets will be stacked within a single column on mobile devices, and resized to match the device's screen width. A mobile version of the site menu will be displayed, with a limit of 3 levels in total (main menu plus 2 submenu levels). Only horizontal menus are available for responsive themes.

To disable responsive behavior within Homestead themes, follow these steps:

1. Enable theme overrides (if you have not done so already).
2. Click the link to download the theme files.
3. Unzip the theme files to a location of your choice on your computer or network.
4. Using a text editor, open the **layout.less** file from the **Styles** folder.
5. Replace the following lines...

```
@state2-minwidth: 600px;
@state2-maxwidth: 959px;
@state3-maxwidth: 616px;
```

with...

```
@state2-minwidth: 0px;
@state2-maxwidth: 0px;

@state3-maxwidth: 0px;
```

6. Replace the following lines...

```
.zoneInner, .zoneWrap
{
 max-width: 960px;
 margin: 0 auto;
 width: 100%;
}
```

with...

```
.zoneInner, .zoneWrap
{
 margin: 0 auto;
 width: 960px;
}
```

7. Upload the modified **layout.less** file to the **Styles** theme folder on your site via File management or WebDAV.
8. Click the **Rebuild theme** button on the **Theme overrides** screen.

The site will now appear the same regardless of device size.

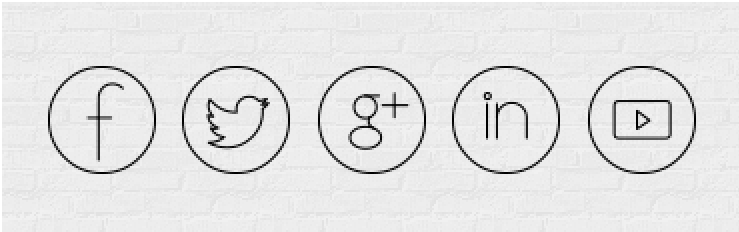
Theme-specific functionality

Homestead themes provide theme-specific functionality, including:

Read more/less

- Static background that doesn't move as visitors scroll up and down the page
- Sticky placeholder to create a non-scrolling area at the top of the page – perfect for sticky menus
- Orientation option – horizontal and vertical – for log in form gadgets
- Ability to hide the **Remember me** and **Forgot password** labels within log in form gadgets, and control whether the email and password labels appear within the entry fields, or outside them
- Secondary menu gadget
- Alignment options for secondary menu, log in button, and log in form gadgets
- Font Awesome iconic font set for adding icons you can easily size and color
- New link button styles

- New social profile icon styles



Customizing Homestead themes

From the Colors and styles screen, you can customize the colors, fonts, styles, and backgrounds of various elements that appear throughout your site. When customizing the colors and styles of Homestead themes, you can customize elements within each gadget. For details, see Color and style settings for Homestead themes.

You can also customize Homestead themes using CSS and theme overrides.

On this page:

Expand all sections

See also:

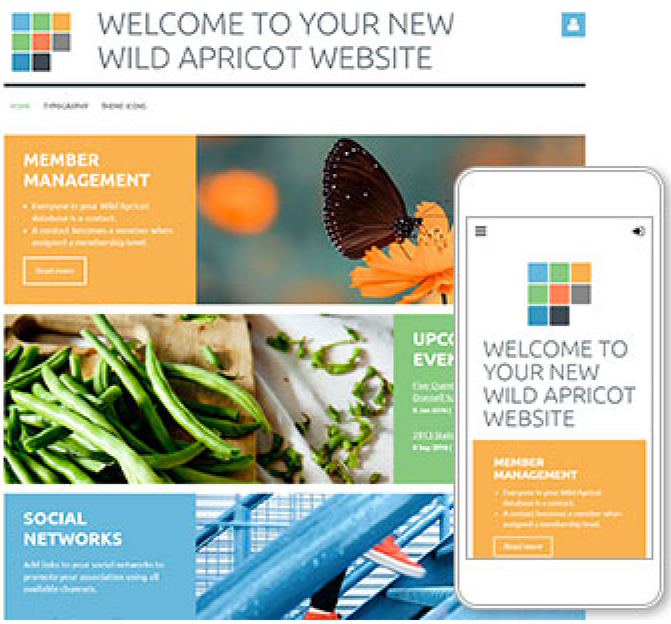
- Website themes
- Color and style settings for Homestead themes

Kaleidoscope theme set

Kaleidoscope theme set

The Kaleidoscope theme set was designed as a general purpose theme. It provides an excellent starting point for designers and others who want to quickly build a modern-looking site.

Using content gadgets as building blocks, the Kaleidoscope theme set delivers a flat, modern look. This theme applies different theme colors to section headings and gadget backgrounds, highlighting different elements and drawing attention to important calls to action.

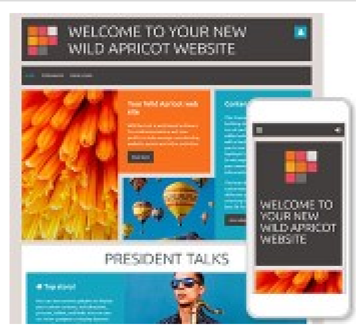


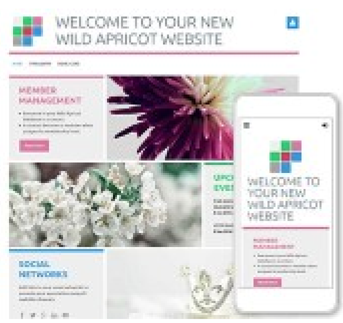
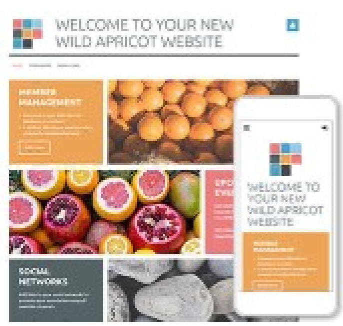
This theme set is fully responsive and mobile friendly, and includes a condensed mobile panel.

Themes within the Kaleidoscope theme set

The Kaleidoscope theme set consists of the following website themes:

Read more/less

Theme name	Thumbnail
Cornucopia	
Jelly Beans	

Mulberry Jam	
Muskoka	
Neon	
Overcast	
Redwood	

Wild Berries	

Responsiveness

By default, responsiveness is enabled in all Kaleidoscope themes. You can, however, disable the responsive behavior using theme overrides.

Read more/less

With responsiveness enabled, gadgets will be stacked within a single column on mobile devices, and resized to match the device's screen width. A mobile version of the site menu will be displayed, with a limit of 3 levels in total (main menu plus 2 submenu levels). Only horizontal menus are available for responsive themes.

To disable responsive behavior within Kaleidoscope themes, follow these steps:

1. Enable theme overrides (if you have not done so already).
2. Click the link to download the theme files.
3. Unzip the theme files to a location of your choice on your computer or network.
4. Using a text editor, open the **layout.less** file from the **Styles** folder.
5. Replace the following lines...

```
@Device-M-MaxWidth: 991px; /* 768 - 991 */
@Container-M-MaxWidth: 970px;

@Device-S-MaxWidth: 767px; /* 480 - 767 */
@Container-S-MaxWidth: 750px;

@Device-XS-MaxWidth: 479px; /* 320 - 479 */
```

with...

```
@Device-M-MaxWidth: 0px; /* 768 - 991 */
@Container-M-MaxWidth: 970px;

@Device-S-MaxWidth: 0px; /* 480 - 767 */
@Container-S-MaxWidth: 750px;

@Device-XS-MaxWidth: 0px; /* 320 - 479 */

body { min-width: 1230px; }
```

6. Upload the modified **layout.less** file to the **Styles** theme folder on your site via File management or WebDAV.
7. Click the **Rebuild theme** button on the **Theme overrides** screen.

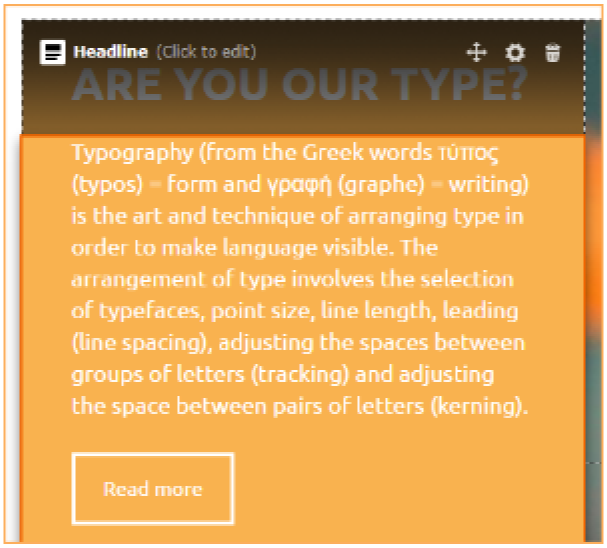
The site will now appear the same regardless of device size.

Theme-specific functionality

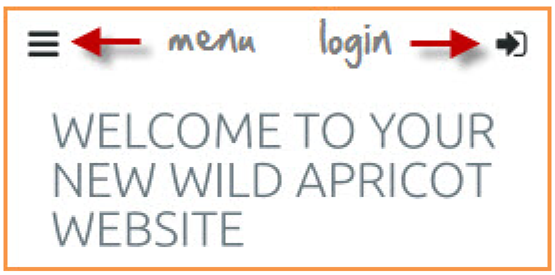
Kaleidoscope themes provide theme-specific functionality, including:

Read more/less

- A new headline gadget designed to display titles and headings for sections or other gadgets

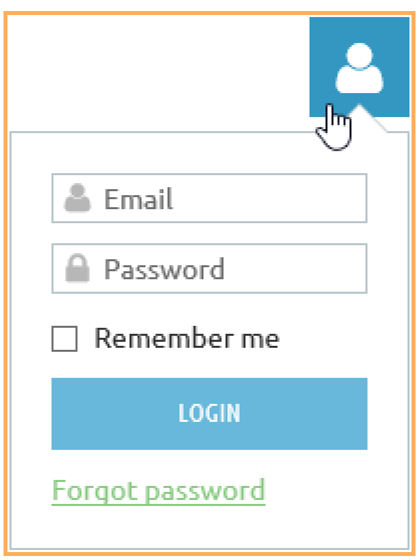


- Mobile panel that replaces the menu bar and login options when the width of the browser window is 768 pixels or less

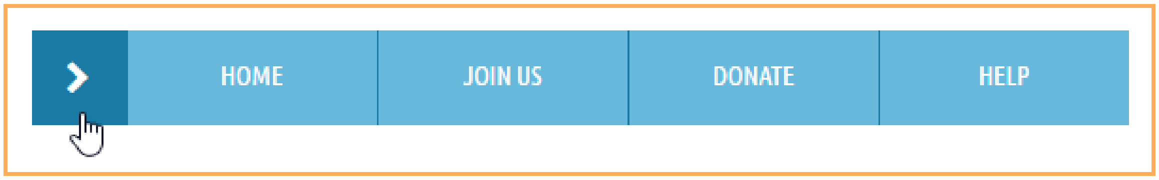


> ⚠ For important instructions on displaying this panel after switching from an existing website theme, see Switching to a Kaleidoscope theme from another theme (below).

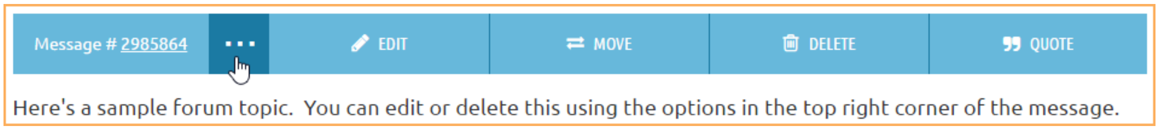
- Dropdown login form



- Alignment option for vertical menus
- Secondary menu gadget with animated sliding panel that can be expanded or collapsed (collapsed by default).



- Gadgets design based on transparent backgrounds with styles specialized for light or dark backgrounds.
- Expandable control panels for blogs, forums, events, and photo albums.



- Styled slideshow with new preview panel, new navigation, and a themed style.

- Advanced colors and styles customization with three typography sets: basic, typography for dark backgrounds, and typography for light backgrounds.
- Alignment option for login gadgets
- Orientation option – horizontal and vertical – for log in form gadgets
- Ability to hide the **Remember me** and **Forgot password** labels within log in form gadgets , and control whether the email and password labels appear within the entry fields, or outside them
- Font Awesome iconic font set for adding icons you can easily size and color

Switching to a Kaleidoscope theme from another theme

When you switch to a Kaleidoscope theme from another Wild Apricot website theme, your existing page templates may not be capable of displaying the mobile panel, which replaces the menu bar and login options in mobile view.

Read more/less

To display the mobile panel in mobile view, you need to use one of the following as the basis for your site pages:

- A new page template based on the **Main layout with mobile panel** master layout.
- One of page templates that was copied along with the demo pages while switching to the new theme.

You cannot make your existing page templates work by changing their master layout to the **Main layout with mobile panel** lay out.

If you do not want to display the mobile panel in mobile view, you need to edit your current page template(s) and change the master layout to **Secondary layout without mobile panel**. Otherwise, your menu and login gadgets may not appear at all in mobile view.

Customizing Kaleidoscope themes

From the Colors and styles screen, you can customize the colors, fonts, styles, and backgrounds of various elements that appear throughout your site. For details, see Color and style settings for Kaleidoscope themes.

You can also customize your theme using CSS and theme overrides.

On this page:

Expand all sections

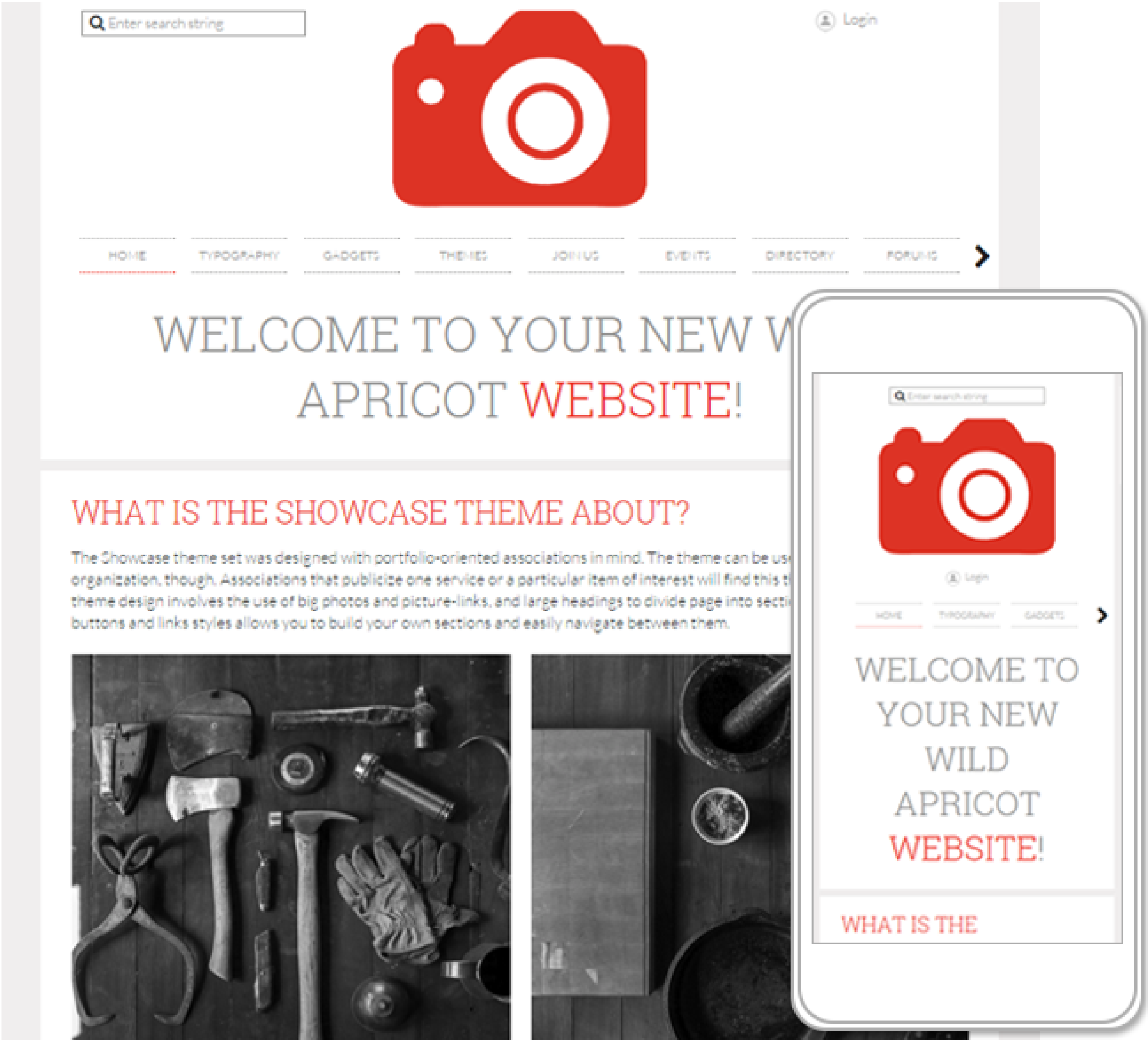
See also:

- Website themes
- Color and style settings for Kaleidoscope themes

Showcase theme set

Showcase theme set

The new Showcase theme set was designed for associations that wish to use an online portfolio to publicize a particular service or product. However, Showcase themes can be used by any organization that wants to take advantage of their responsiveness, their color schemes, or their theme-specific functionality (see below).

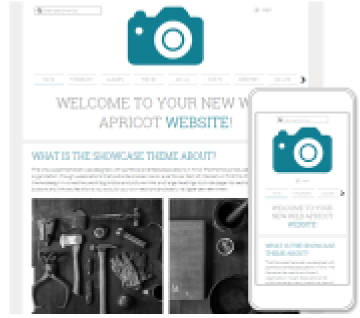
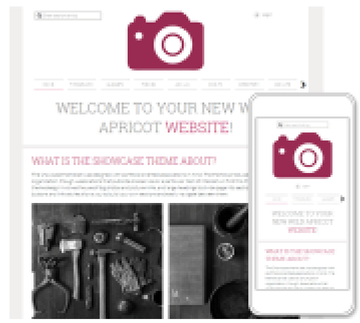
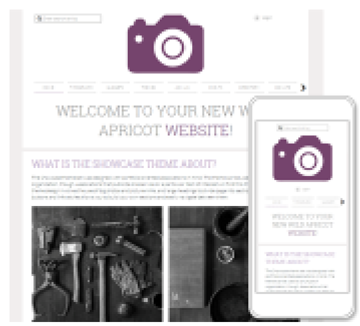


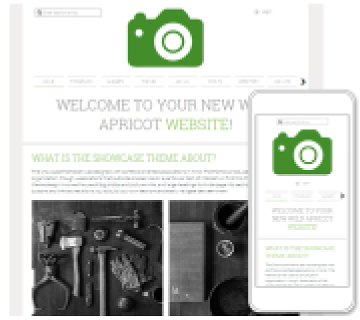
Themes within the theme set

The Showcase theme set consists of the following website themes:

Read more/less

Variation name	Thumbnail
Showcase Red	

Showcase Teal	
Showcase Orange	
Showcase Crimson	
Showcase Purple	
Showcase Blue	

Showcase Green	

Design elements

The Showcase theme design involves the use of large photos and linked pictures, along with big headings to divide page into sections.

Read more/less

Numerous button and link styles allow you to build your own sections and easily navigate between them. The scrolling menu style makes it easy for your users to navigate your site.

We've used a very small number of colors in this theme design, because we followed the "content as the hero" concept, so as not to distract visitors to your site by a large number of colors. You can make your site your own by choosing a different color variation or using your favorite color.

Showcase themes are fully adaptive to different screen sizes, featuring adaptive orientation settings in social profile and secondary menu gadgets and fully adaptive donation goals and forms. And, of course, adaptive typography that will adjust font sizes on your mobile devices.

As well, Font Awesome – a font consisting entirely of icons – has been added to the theme. You can copy and paste icons from the **Theme icons** page, which appears as a sample page when you create a site using this theme, or switch to it. To keep the icons readily available, you might want to keep this page as an admin-only non-menu page. For more information, see Using Font Awesome icons .

Responsiveness

By default, responsiveness is enabled in all Showcase themes. You can, however, disable the responsive behavior using theme overrides.

Read more/less

With responsiveness enabled, gadgets will be stacked within a single column on mobile devices, and resized to match the device's screen width. A mobile version of the site menu will be displayed, with a limit of 3 levels in total (main menu plus 2 submenu levels). Only horizontal menus are available for responsive themes.

To disable responsive behavior within Showcase themes, follow these steps:

1. Enable theme overrides (if you have not done so already).
2. Click the link to download the theme files.
3. Unzip the theme files to a location of your choice on your computer or network.
4. Using a text editor, open the **basic.responsive.grid.less** file from the **Styles** folder.
5. Replaces the following lines...

```
@state2-minwidth: 600px;
@state2-maxwidth: 959px;

@state3-minwidth: 320px;
@state3-maxwidth: 616px;
```

with...

```
@state2-minwidth: 0px;
@state2-maxwidth: 0px;

@state3-minwidth: 0px;
@state3-maxwidth: 0px;
```

6. Upload the modified **basic.responsive.grid.less** file to the **Styles** theme folder on your site via File management or WebDAV.
7. Click the **Rebuild theme** button on the **Theme overrides** screen.

The site will now appear the same regardless of device size.

Theme-specific functionality

Showcase themes provide theme-specific functionality, including:

Read more/less

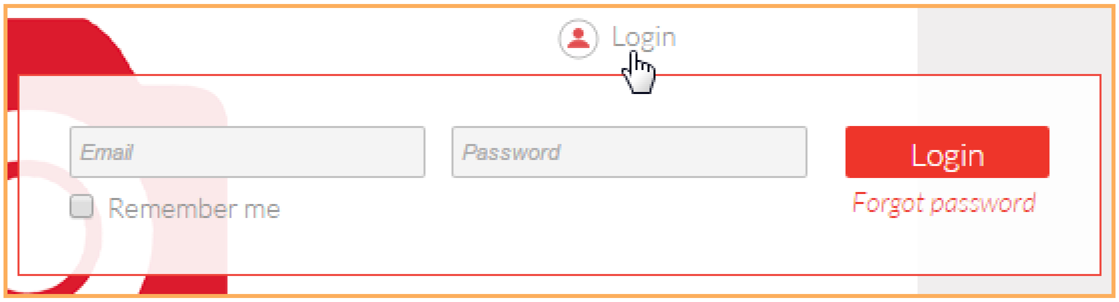
- Special scrollable menu style

This style displays only the top level menu. For best results with this style, keep the page names short. As usual, we also provide you with our classic menu style if you want to combine a multi-level site structure with the Showcase design.

- Image link effect. When you hover over an image, a tooltip appears over the image , and a surface color is applied.

> The image link effect is not automatically applied. For instructions on applying this effect to images within this theme, see Applying the image link effect (below).

- Dropdown login form



- Alignment options for login gadgets
- Orientation option – horizontal and vertical – for log in form gadgets
- Ability to hide the **Remember me** and **Forgot password** labels within log in form gadgets, and control whether the email and password labels appear within the entry fields, or outside them
- Secondary menu gadget , with alignment option
- Font Awesome iconic font set for adding icons you can easily size and color

Applying the image link effect

The image link effect occurs when someone hovers over an image. A surface color with an opaque background is applied to the image, and a tooltip is displayed centered over the image. This effect can be manually applied to individual images within your site.

Read more/less

To apply the image link effect to an image, follow these steps:

1. Place your image in a content gadget. Do not forget to position it correctly using margins and padding.
2. Add a link to the picture. Do not forget to add a tooltip if you want this text to appear on your image.
3. While editing the content gadget, click the **HTML** icon in the content editor toolbar.

4. Within your gadget's HTML code, find the tag *<a>...* used to display your linked image.

```
<h1 class="contStyleExcHeadingColored"></h1><h1><font style="font-size: 48px;"><a href="http://wikipedia.com/Typography"
target="_blank"><img class="artText" src="/Content/ArtText/67425.png?
text=Welcome%20to%20your%20Wild%20Apricot%20website&amp;style=Site%20title%2011&amp;styleGroup=100&amp;fn=PT%20Sans&amp;fs
=40&amp;sid=10007134099612908" title="Welcome to your Wild Apricot website" alt="Welcome to your Wild Apricot website"
border="0"></a></font></h1>
```

5. Add *class="animatedPicture"* to your *<a>* tag so it will look like *<a class="animatedPicture"...>*

```
<h1 class="contStyleExcHeadingColored"></h1><h1><font style="font-size: 48px;"><a class="animatedPicture"
href="http://wikipedia.com/Typography" target="_blank"><img class="artText" src="/Content/ArtText/67425.png?
text=Welcome%20to%20your%20Wild%20Apricot%20website&amp;style=Site%20title%2011&amp;styleGroup=100&amp;fn=PT%20Sans&amp;fs
=40&amp;sid=10007134099612908" title="Welcome to your Wild Apricot website" alt="Welcome to your Wild Apricot website"
border="0"></a></font></h1>
```

6. Click the **Save** button to save your code changes.
7. Click the **Save** button to save changes to your page.

The color applied when someone hovers over the image depends on which theme variation you are using. If you want to change the hover color, follow these steps:

1. Under the **Website** menu, click **CSS**.
2. In the **Editor** field, enter the following code:

```
body :not(pageModeEdit) a.animatedPicture:before{
background-color: #ed3529;
}
```

and replace *#ed3529* with desired color in hexadecimal format.

3. Click **Save** to save your changes.

Customizing Showcase themes

From the Colors and styles screen, you can customize the colors, fonts, styles, and backgrounds of various elements that appear throughout your site. When customizing the colors and styles of Showcase themes, you can customize elements within each gadget. For details, see Color and style settings for Showcase themes.

You can also customize Showcase themes using CSS and theme overrides.

On this page:

Expand all sections

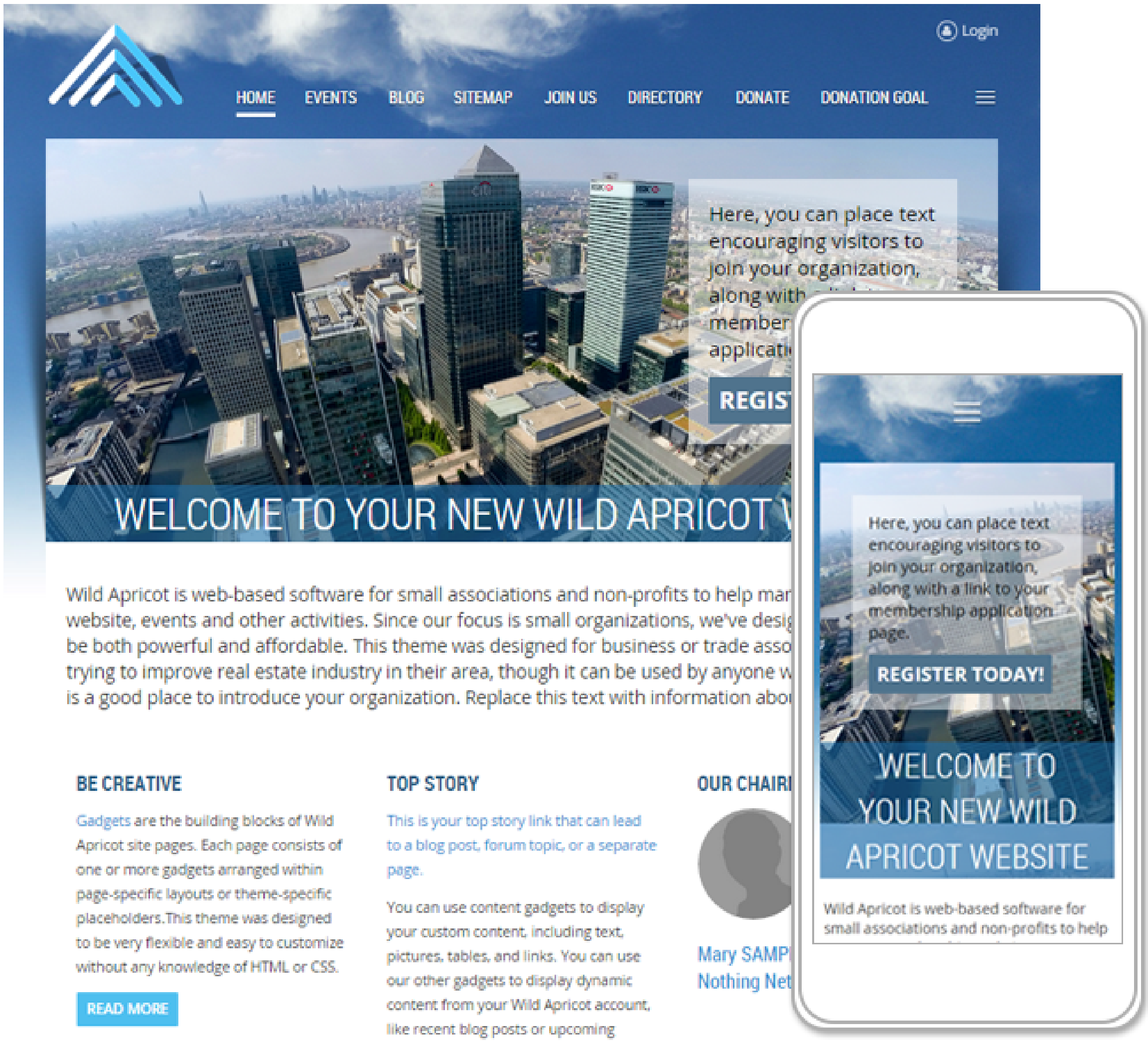
See also:

- Website themes
- Color and style settings for Showcase themes

Skyline theme set

Skyline theme set

The Skyline theme set is part of a series of themes designed for business and trade associations. Though designed with real estate organizations in mind, Skyline themes can be used by any type of organization, particularly if you want to take advantage of its responsiveness and its theme-specific functionality (see below).



Themes within the theme set

The Skyline theme set consists of the following website themes:

Read more/less

Theme name	Theme colors
Downtown	
Suburbia	
Uptown	
Midtown	

Design elements

The Skyline theme set makes great use of spacing with clear white content areas and complex static backgrounds.

Read more/less

Colors are soft, providing a comfortable environment for visitors who want to spend more time exploring your site's content.

A defining element of the Skyline theme set is its static background which does not move as your visitors scroll up and down the page. This allows for complex background images. You can change the site background from the Colors & styles screen.

The theme also features special *placeholders* – used to define the areas within page templates where content can be placed – with drop shadows to make your site look less flat. The placeholders with drop shadows are identified by HTML IDs of *id_Header1* and *id_Footer*. If you want your site to appear more flat, simply leave these placeholders empty and the drop shadows will not appear on your pages.

For a modern look, we chose OpenSans as the base font for this theme set, and Roboto Condensed for theme headings. This modern combination makes for clear designs and more readable site content, even when using complex backgrounds.

As well, Font Awesome – a font consisting entirely of icons – has been added to the theme. You can copy and paste icons from the **The me icons** page, which appears as a sample page when you create a site using this theme, or switch to it. To keep the icons readily available, you might want to keep this page as an admin-only non-menu page. For more information, see Using Font Awesome icons.

The gadget styles in this theme are simpler, with fewer styles to choose from, while the Colors & styles settings – particularly those for gadget elements – have been greatly expanded.

Responsiveness

By default, responsiveness is enabled in all Skyline themes. You can, however, disable the responsive behavior using theme overrides.

Read more/less

With responsiveness enabled, gadgets will be stacked within a single column on mobile devices, and resized to match the device's screen width. A mobile version of the site menu will be displayed, with a limit of 3 levels in total (main menu plus 2 submenu levels). Only horizontal menus are available for responsive themes.

To disable responsive behavior within Skyline themes, follow these steps:

1. Enable theme overrides (if you have not done so already).
2. Click the link to download the theme files.
3. Unzip the theme files to a location of your choice on your computer or network.
4. Using a text editor, open the **basic.responsive.grid.less** file from the **Styles** folder.
5. Replace the following lines...

```
@state2-minwidth: 600px;
@state2-maxwidth: 959px;

@state3-minwidth: 320px;
@state3-maxwidth: 616px;
```

   with...

```
@state2-minwidth: 0px;
@state2-maxwidth: 0px;

@state3-minwidth: 0px;
@state3-maxwidth: 0px;
```

6. Upload the modified **basic.responsive.grid.less** file to the **Styles** theme folder on your site via File management or WebDAV.
7. Click the **Rebuild theme** button on the **Theme overrides** screen.

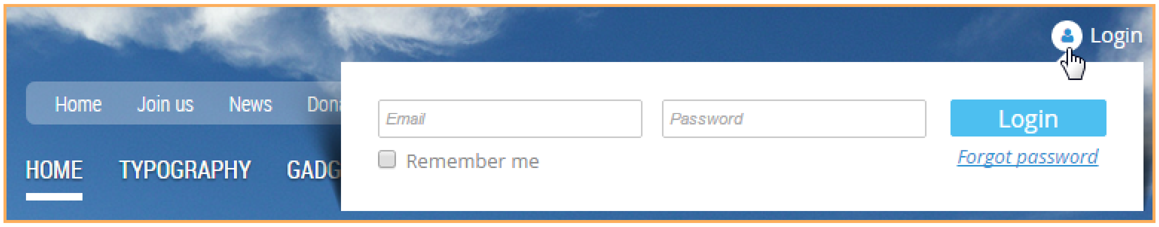
The site will now appear the same regardless of device size.

Theme-specific functionality

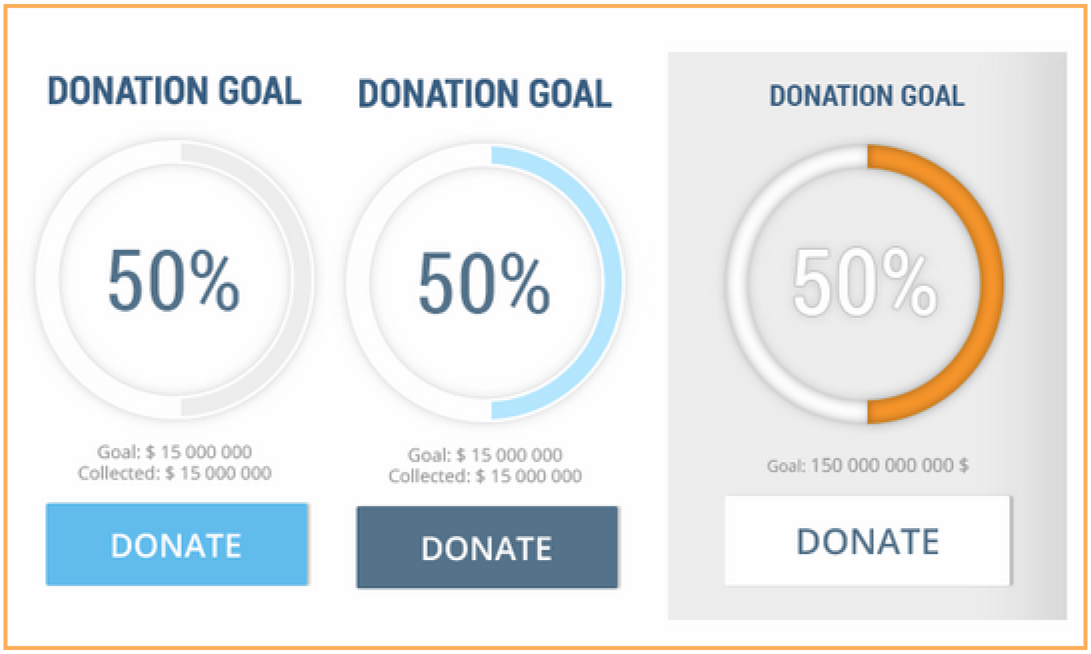
Skyline themes provide theme-specific functionality, including:

Read more/less

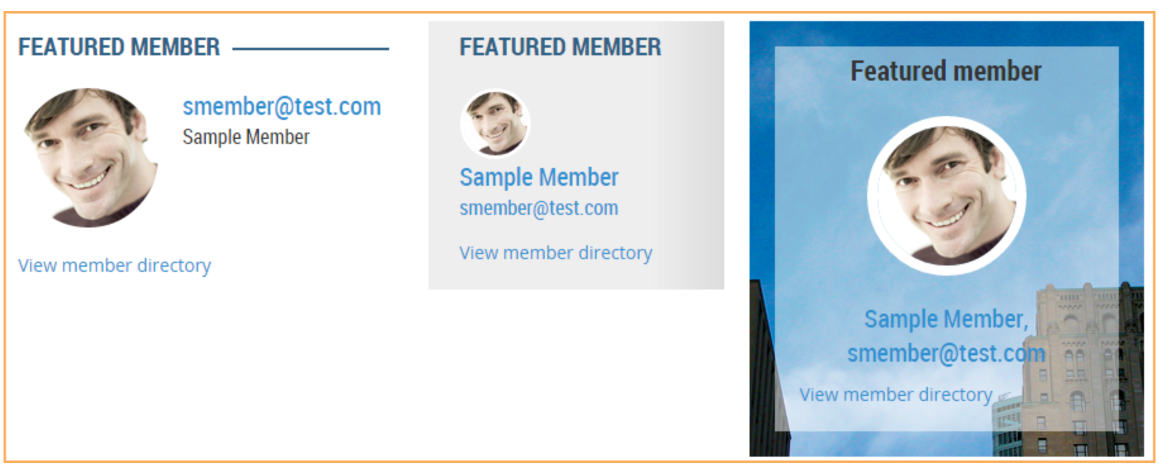
- Static background that doesn't move as visitors scroll up and down the page
- Dropdown login box



- Orientation option – horizontal and vertical – for log in form gadgets
- Ability to hide the **Remember me** and **Forgot password** labels within log in form gadgets, and control whether the email and password labels appear within the entry fields, or outside them
- New donation goal styles



- New round featured member styles



- Secondary menu gadget

- Font Awesome iconic font set for adding icons you can easily size and color

Customizing Skyline themes

From the Colors and styles screen, you can customize the colors, fonts, styles, and backgrounds of various elements that appear throughout your site. When customizing the colors and styles of Skyline themes, you can customize elements within each gadget. For details, see Color and style settings for Skyline themes.

You can also customize Skyline themes using CSS and theme overrides.

On this page:

- Themes within the theme set
- Design elements
- Responsiveness
- Theme-specific functionality
- Customizing Skyline themes

Expand all sections

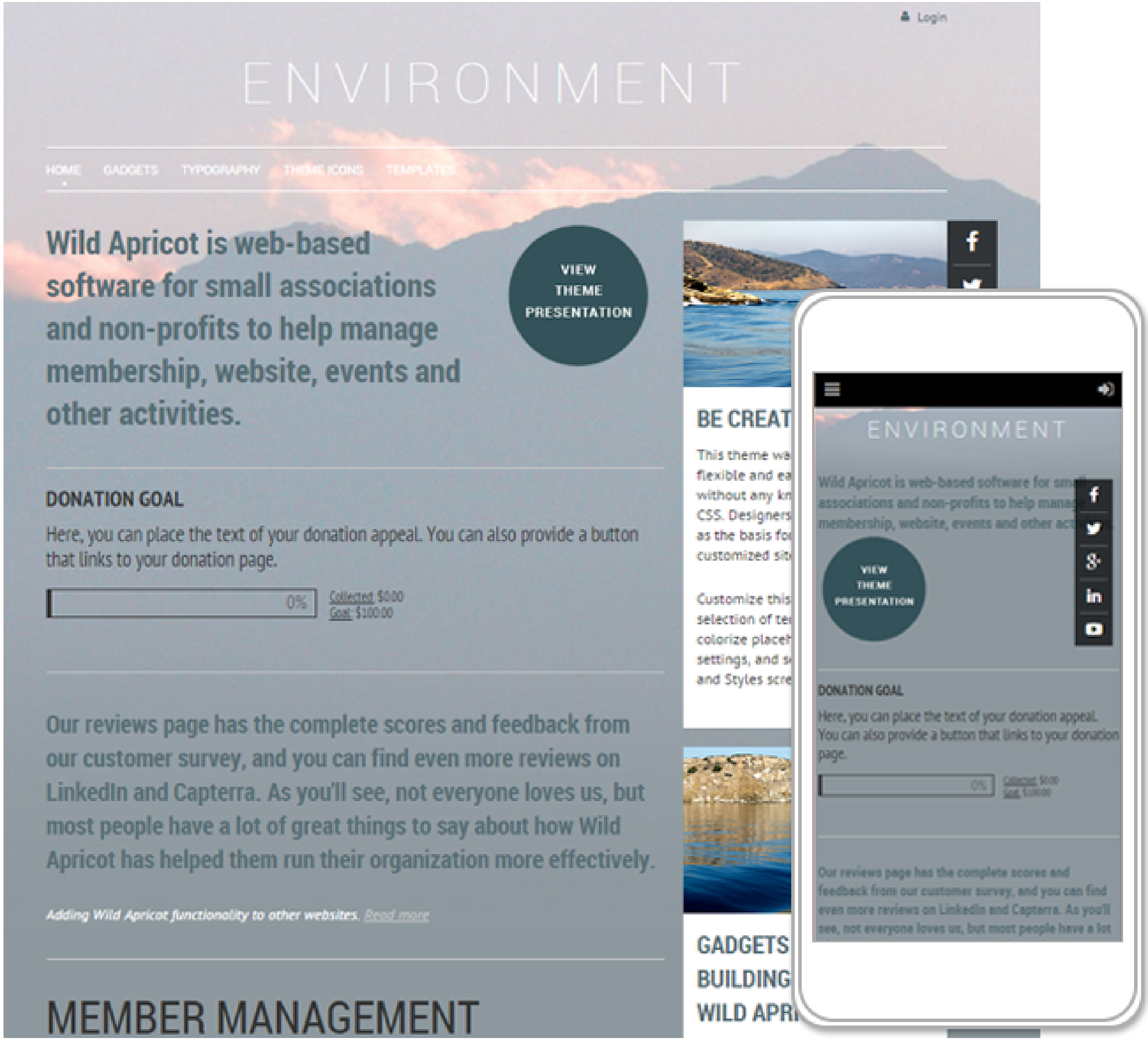
See also:

- Website themes
- Color and style settings for Skyline themes

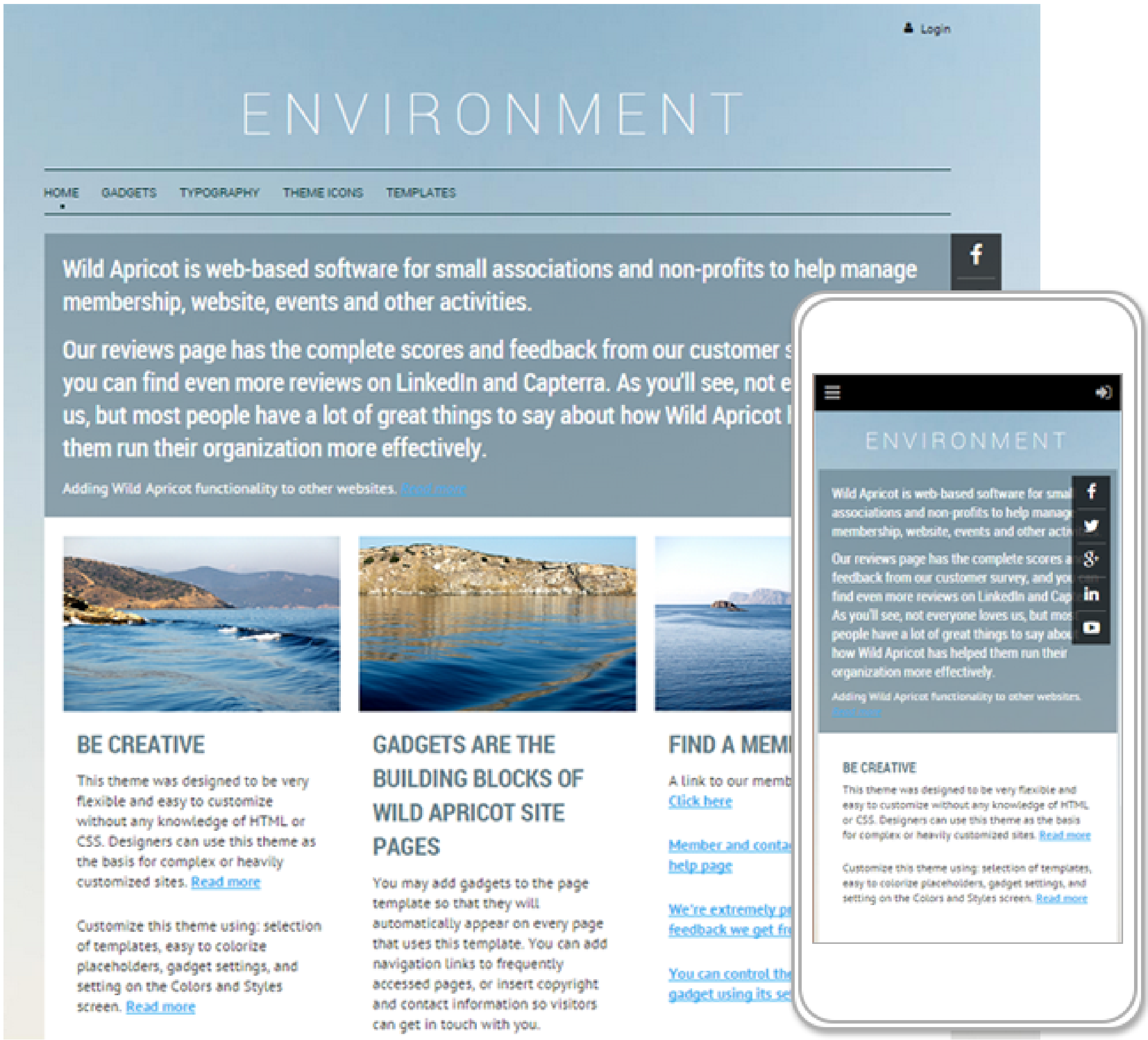
Terra and Firma theme sets

Terra and Firma theme sets

The Terra and Firma themes were designed for ecological and environmental organizations, but can be used by any type of organization that wants to take advantage of their responsiveness, their color schemes, or their theme-specific functionality (see below) , particularly organizations with a connection to nature. The two theme sets offer the same basic functionality, but differ in one significant respect: backgrounds on sites that use Terra themes move up and down as the viewer scrolls through the page.



On sites using Firma themes, the background remains fixed as the viewer scrolls through the page.

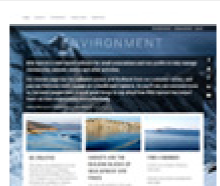
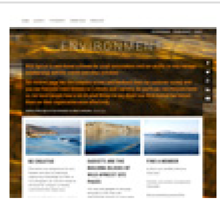


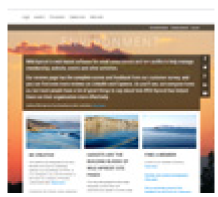
The two theme sets also offer different color and image combinations.

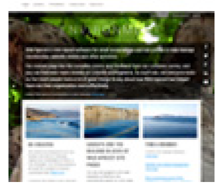
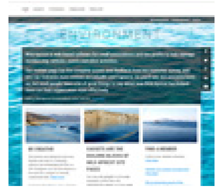
Themes within the theme sets

The Terra theme set consists of the following website themes:

Read more/less

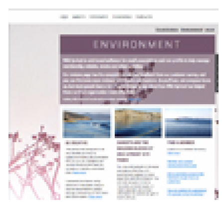
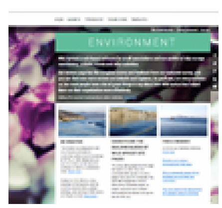
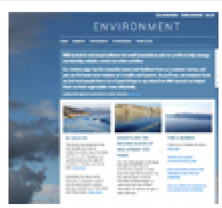
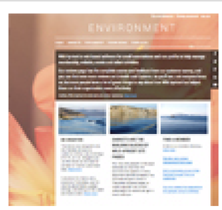
Theme name	Thumbnail
Alpine Adventure	
Amber Creek	

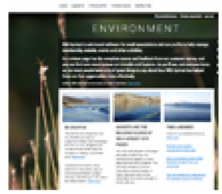
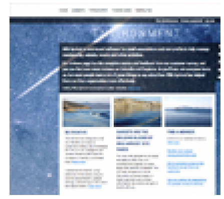
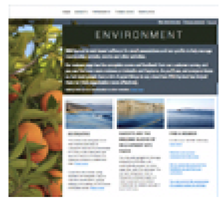
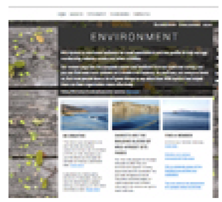
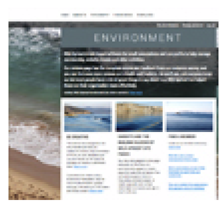
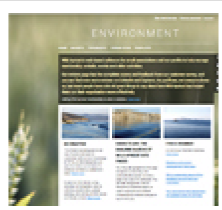
Evening's End	
Field of Dreams	
Misty Mountain	
Morning Glory	
Oyster Cove	
Painted Skies	
Pebble Beach	
Rocky Lake	

Squirrel's Paradise	
Tropical Blue	

The Firma theme set consists of the following website themes:

Read more/less

Theme name	Thumbnail
Above the Clouds	
Berry Burst	
Cherry Blossom	
Cloud Burst	
Hawaiian Breeze	

Lazy Harvest	
Make a Wish	
Orange Grove	
Rustic Deck	
Sandy Shore	
Stand Tall	
Wheatfield	

Design elements

The Terra and Firma theme sets were built around large backgrounds.

Read more/less

The typographical elements were designed to work with a wide range of background colors, and the Opacity 60% gadget style – available for content gadgets among others – produces a semi-transparent gadget that allows the background image to show through. You can replace the current background image from the Colors and Styles screen with any good quality image at least 2560 pixels wide.

For an enhanced mobile experience, these theme sets feature a special mobile panel that replaces the menu bar and login options on mobile devices. If you don't want a mobile panel, you can choose a master layout without the panel. A new option for content gadgets automatically hides pictures in mobile view.

For a modern look, we chose PT Sans as the base font for this theme set, and Roboto for theme headings. This modern combination makes for clear designs and more readable site content, even when using complex backgrounds.

As well, Font Awesome – a font consisting entirely of icons – has been added to the theme. You can copy and paste icons from the **The me icons** page, which appears as a sample page when you create a site using this theme, or switch to it. To keep the icons readily available, you might want to keep this page as an admin-only non-menu page. For more information, see Using Font Awesome icons.

Responsiveness

By default, responsiveness is enabled in all Terra and Firma themes. You can, however, disable the responsive behavior using theme overrides.

Read more/less

With responsiveness enabled, gadgets will be stacked within a single column on mobile devices, and resized to match the device's screen width. A mobile version of the site menu will be displayed, with a limit of 3 levels in total (main menu plus 2 submenu levels). Only horizontal menus are available for responsive themes.

To disable responsive behavior within Terra and Firma themes, follow these steps:

1. Enable theme overrides (if you have not done so already).
2. Click the link to download the theme files.
3. Unzip the theme files to a location of your choice on your computer or network.
4. Using a text editor, open the **basic.responsive.grid.less** file from the **Styles** folder.
5. Replaces the following lines...

```
@state2-minwidth: 600px;
@state2-maxwidth: 959px;

@state3-minwidth: 320px;
@state3-maxwidth: 616px;
```

with...

```
@state2-minwidth: 0px;
@state2-maxwidth: 0px;

@state3-minwidth: 0px;
@state3-maxwidth: 0px;
```

6. Upload the modified **basic.responsive.grid.less** file to the **Styles** theme folder on your site via File management or WebDAV.
7. Click the **Rebuild theme** button on the **Theme overrides** screen.

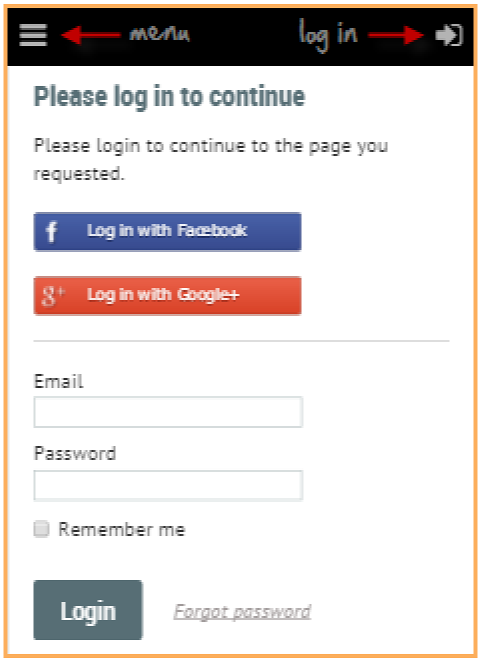
The site will now appear the same regardless of device size.

Theme-specific functionality

Terra and Firma themes provide theme-specific functionality, including:

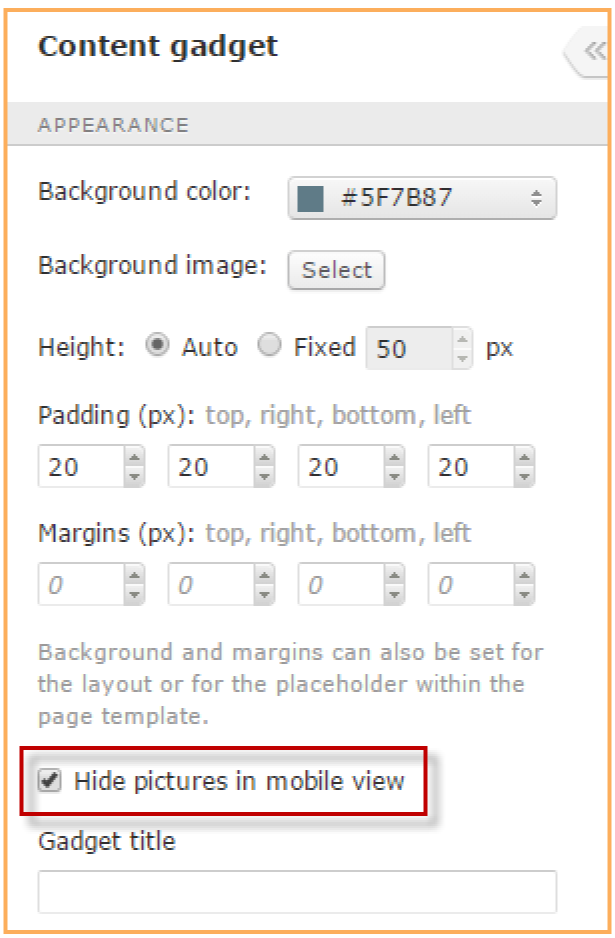
Read more/less

- Mobile panel that replaces the menu bar and login options when the width of the browser window is 600 pixels or less

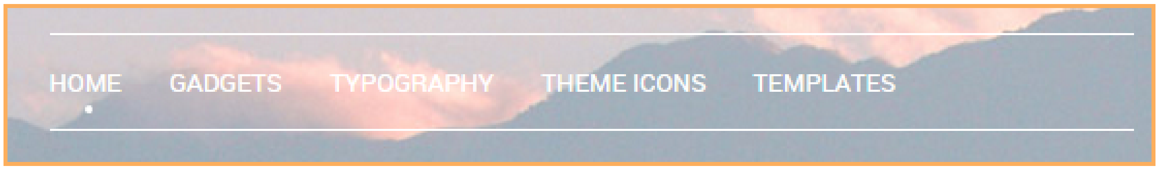


For important instructions on displaying this panel after switching from an existing website theme, see Switching to Terra or Firma from an existing theme (below).

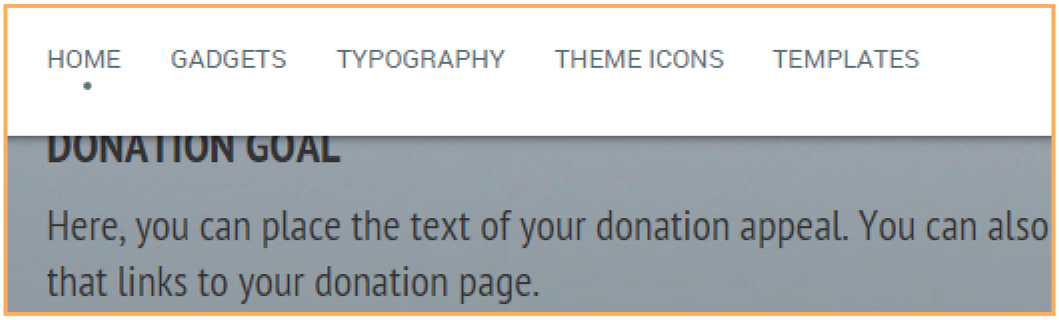
- Content gadget setting to hide pictures in mobile view



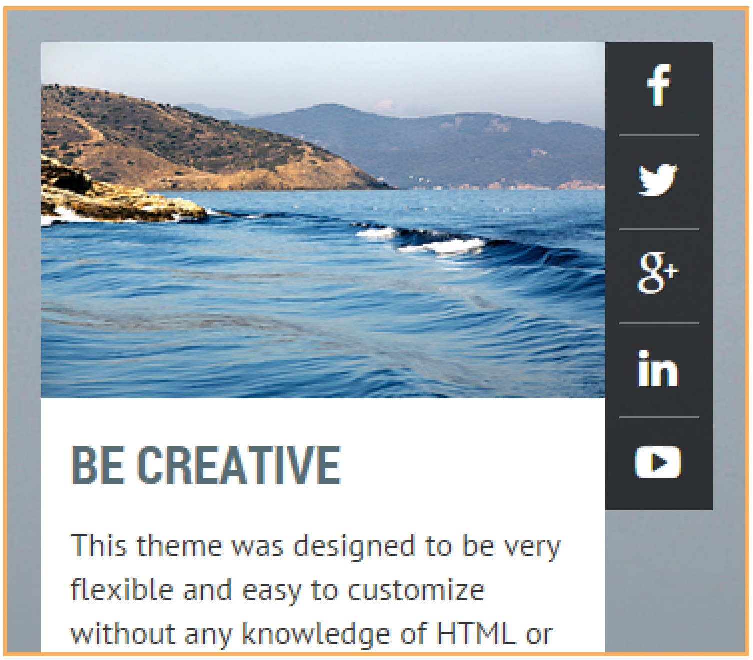
- Sticky menu style which causes the menu to stick to the top of the page once it reaches the top of the browser. For example, as you begin scrolling a page, the standard menu...



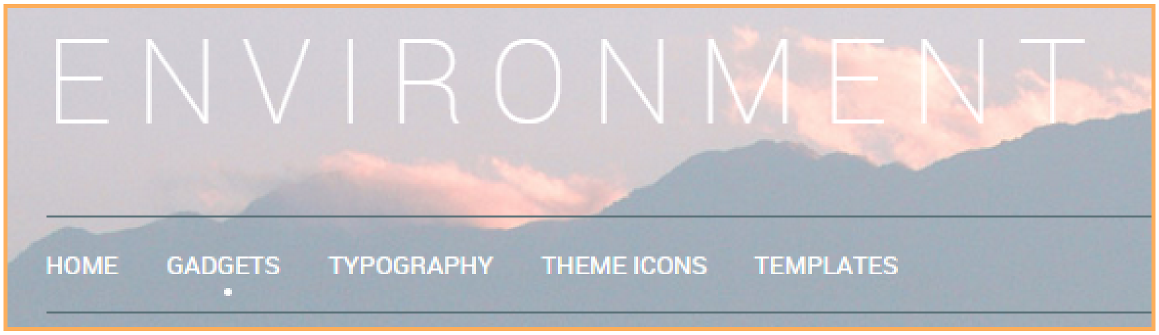
becomes a sticky, non-scrolling menu...



- Fixed position setting for social profile gadgets, allowing your social icons to appear on the outer right edge of the placeholder and remain in position as the viewer scrolls the page.

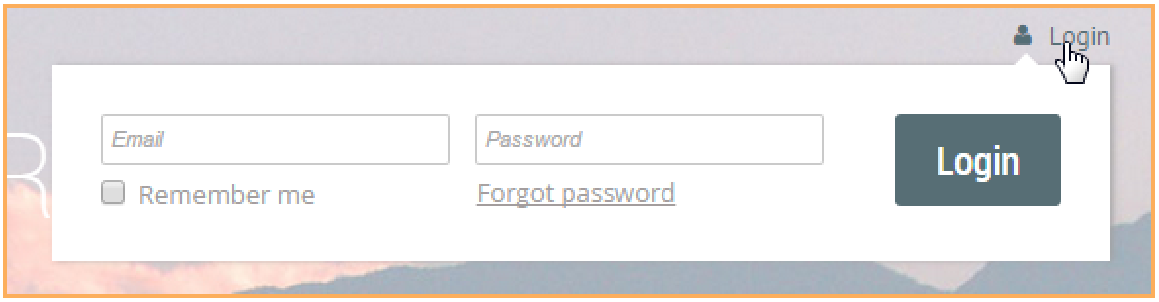


- Gadget style option – Opacity 60% – that results in a semi-transparent gadget background.



Available for content gadgets, upcoming events gadgets, recent blog post gadgets, and forum updates gadgets.

- Dropdown login form



- Alignment options for login gadgets
- Orientation option – horizontal and vertical – for log in form gadgets
- Ability to hide the **Remember me** and **Forgot password** labels within log in form gadgets, and control whether the email and password labels appear within the entry fields, or outside them
- Secondary menu gadget , with alignment option
- Font Awesome iconic font set for adding icons you can easily size and color

Switching to Terra or Firma from an existing theme

When you switch to a Terra or Firma theme from another Wild Apricot website theme, your existing page templates may not be capable of displaying the mobile panel, which replaces the menu bar and login options in mobile view.

Read more/less

To display the mobile panel in mobile view, you need to use one of the following as the basis for your site pages:

- A new page template based on the **Main layout with mobile panel** master layout.
- One of page templates that was copied along with the demo pages while switching to the new theme.

> ⚠ You cannot make your existing page templates work by changing their master layout to the **Main layout with mobile panel** la yout.

If you do not want to display the mobile panel in mobile view, you need to edit your current page template(s) and change the master layout to **Secondary layout without mobile panel**. Otherwise, your menu and login gadgets may not appear at all in mobile view.

Customizing Terra and Firma themes

From the Colors and styles screen, you can customize the colors, fonts, styles, and backgrounds of various elements that appear throughout your site. When customizing the colors and styles of Terra and Firma themes, you can customize elements within each gadget. For details, see Color and style settings for Terra and Firma themes.

You can also customize Terra and Firma themes using CSS and theme overrides.

On this page:

- Theme-specific functionality
- Switching to Terra or Firma from an existing theme
- Customizing Terra and Firma themes

Expand all sections

See also:

- Website themes
- Color and style settings for Terra and Firma themes

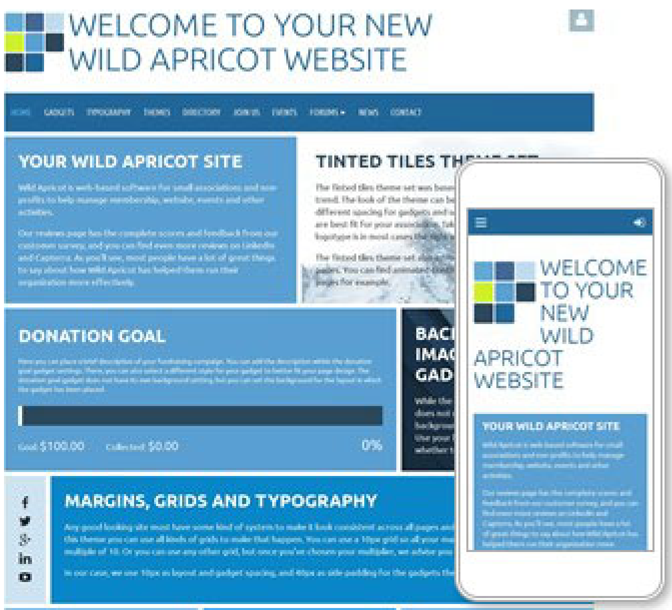
Tinted Tiles and Building Blocks theme sets

Tinted Tiles and Building Blocks theme sets

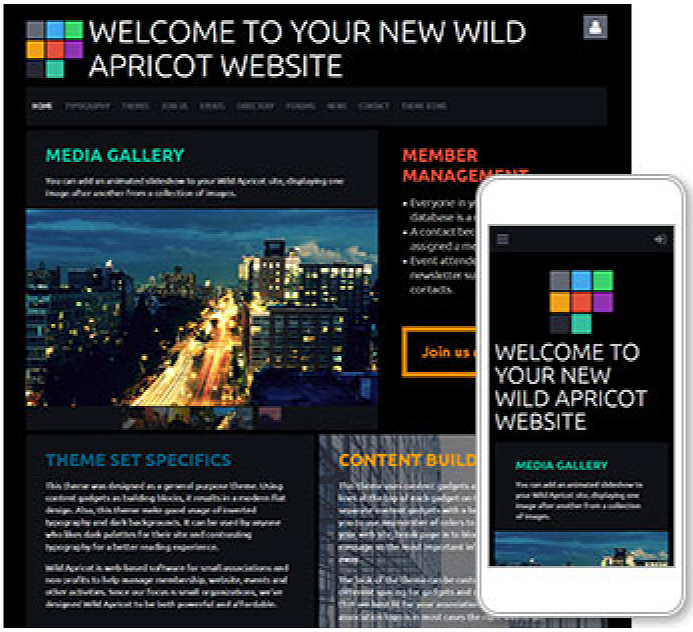
The Tinted Tiles and Building Blocks theme sets are built around the flat design trend and sliding puzzle design approach – plenty of squares and rectangles. The general idea is to build page design around simple shapes and customize the appearance by applying different theme colors to section headings and gadget backgrounds, and setting the margins between gadgets.

Both theme sets are fully responsive and mobile friendly, and include a condensed mobile panel.

The Tinted Tiles theme set provides an excellent starting point for designers and others who want to quickly build a flat and modern site.



The Building Blocks theme set combines inverted typography and dark backgrounds with colorful titles and accents for an improved reading experience.

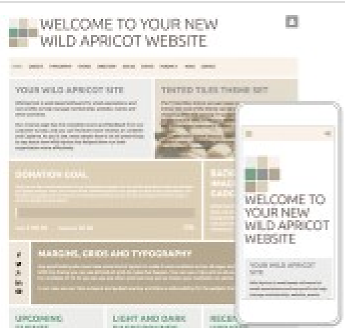


To build an effective site page using themes from either theme set, you just spread your content among the various blocks, then choose the margin you want between the blocks. To set blocks off from one another, you can choose layout and gadget backgrounds.

Themes within the Tinted Tiles theme set

The Tinted Tiles theme set consists of the following website themes:

Read more/less

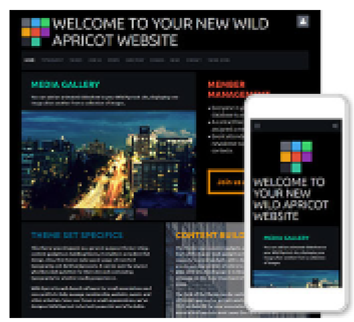
Theme name	Thumbnail
Azure	
Cappuccino	

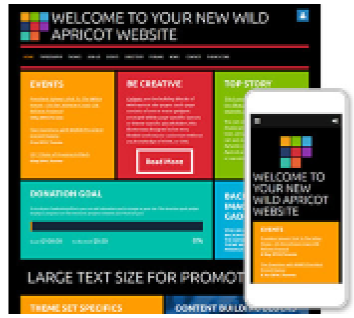
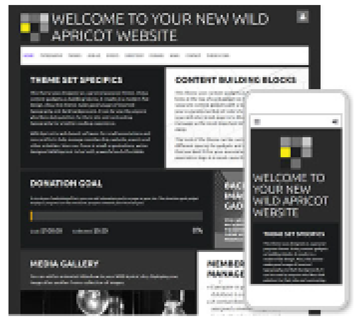
Partly Cloudy	
Skyfall	

Themes within the Building Blocks theme set

The Building Blocks theme set consists of the following website themes:

Read more/less

Theme name	Thumbnail
Black Light Poster	
Black Light Wallpaper	

Board Game	
Duotone	

Design elements

Tinted Tiles and Building Blocks themes consist of a series of blocks, displayed using monochrome palettes that combine a primary color with a contrast color to highlight important information.

Read more/less

For a modern look, we chose Ubuntu as the base font for this theme set. This modern combination makes for clear designs and readable site content, complimenting overall flat design trend.

As well, Font Awesome – a font consisting entirely of icons – has been added to the theme. You can copy and paste icons from the **The me icons** page, which appears as a sample page when you create a site using this theme, or switch to it. To keep the icons readily available, you might want to keep this page as an admin-only non-menu page. For more information, see Using Font Awesome icons.

For an enhanced mobile experience, these theme sets feature a special mobile panel that replaces the menu bar and login options on mobile devices. If you don't want a mobile panel, you can choose a master layout without the panel.

Responsiveness

By default, responsiveness is enabled in all Tinted Tiles and Building Block themes. You can, however, disable the responsive behavior using theme overrides.

Read more/less

With responsiveness enabled, gadgets will be stacked within a single column on mobile devices, and resized to match the device's screen width. A mobile version of the site menu will be displayed, with a limit of 3 levels in total (main menu plus 2 submenu levels). Only horizontal menus are available for responsive themes.

To disable responsive behavior within Tinted Tiles and Building Blocks themes, follow these steps:

1. Enable theme overrides (if you have not done so already).
2. Click the link to download the theme files.
3. Unzip the theme files to a location of your choice on your computer or network.
4. Using a text editor, open the **layout.less** file from the **Styles** folder.
5. Replace the following lines...

```
@Device-M-MaxWidth: 991px; /* 768 - 991 */
@Container-M-MaxWidth: 970px;

@Device-S-MaxWidth: 767px; /* 480 - 767 */
@Container-S-MaxWidth: 750px;

@Device-XS-MaxWidth: 479px; /* 320 - 479 */
```

with...

```
@Device-M-MaxWidth: 0px; /* 768 - 991 */
@Container-M-MaxWidth: 970px;

@Device-S-MaxWidth: 0px; /* 480 - 767 */
@Container-S-MaxWidth: 750px;

@Device-XS-MaxWidth: 0px; /* 320 - 479 */

body { min-width: 1230px; }
```

6. Upload the modified **layout.less** file to the **Styles** theme folder on your site via File management or WebDAV.
7. Click the **Rebuild theme** button on the **Theme overrides** screen.

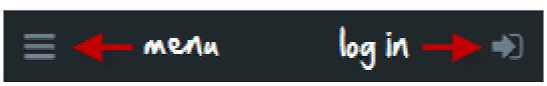
The site will now appear the same regardless of device size.

Theme-specific functionality

Tinted Tiles and Building Blocks themes provide theme-specific functionality, including:

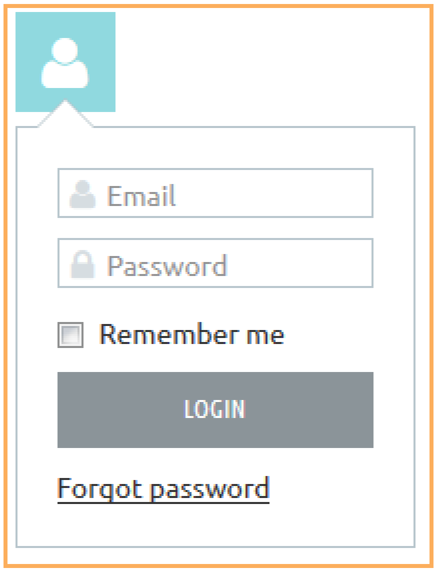
Read more/less

- Mobile panel that replaces the menu bar and login options when the width of the browser window is 768 pixels or less

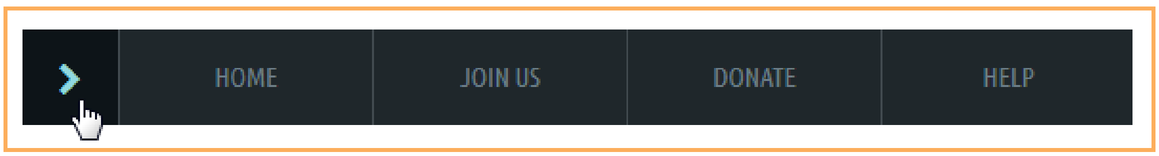


> For important instructions on displaying this panel after switching from an existing website theme, see Switching to a Tinted Tiles theme from another theme (below).

- Dropdown login form



- Alignment option for vertical menus
- Secondary menu gadget with animated sliding panel that can be expanded or collapsed (collapsed by default).



- Gadgets design based on transparent backgrounds with styles specialized for light or dark backgrounds.
- Expandable control panels for blogs, forums, events, and photo albums.

- Styled slideshow with new preview panel, new navigation, and a themed style.

- Advanced colors and styles customization with three typography sets: basic, typography for dark backgrounds, and typography for light backgrounds.
- Alignment option for login gadgets
- Orientation option – horizontal and vertical – for log in form gadgets
- Ability to hide the **Remember me** and **Forgot password** labels within log in form gadgets , and control whether the email and password labels appear within the entry fields, or outside them
- Font Awesome iconic font set for adding icons you can easily size and color

Switching to a Tinted Tiles or Building Blocks theme from another theme

When you switch to a Tinted Tiles or Building Blocks theme from another Wild Apricot website theme, your existing page templates may not be capable of displaying the mobile panel, which replaces the menu bar and login options in mobile view.

Read more/less

To display the mobile panel in mobile view, you need to use one of the following as the basis for your site pages:

- A new page template based on the **Main layout with mobile panel** master layout.
- One of page templates that was copied along with the demo pages while switching to the new theme.

You cannot make your existing page templates work by changing their master layout to the **Main layout with mobile panel** lay out.

If you do not want to display the mobile panel in mobile view, you need to edit your current page template(s) and change the master layout to **Secondary layout without mobile panel**. Otherwise, your menu and login gadgets may not appear at all in mobile view.

Customizing Tinted Tiles and Building Blocks themes

From the Colors and styles screen, you can customize the colors, fonts, styles, and backgrounds of various elements that appear throughout your site. For details, see Color and style settings for Tinted Tiles and Building Blocks themes.

You can also customize your theme using CSS and theme overrides.

On this page:

Expand all sections

See also:

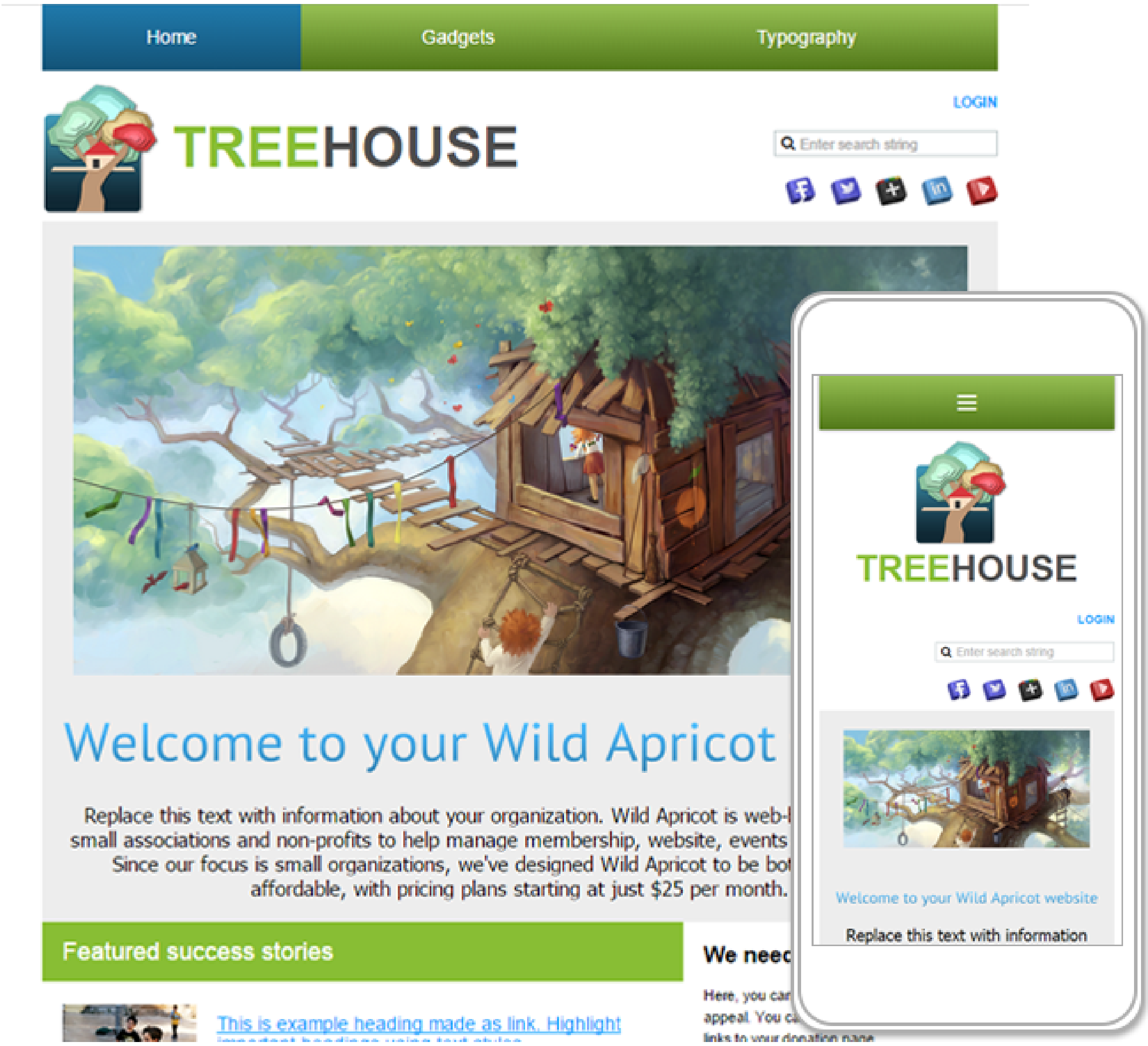
- Website themes
- Color and style settings for Tinted Tiles and Building Blocks themes

Treehouse theme set

Treehouse theme set

> The themes in the new Treehouse theme set are fully responsive and mobile friendly. This version supersedes the non-responsive versions that was released earlier and is now being deprecated.

Though designed for organizations that address the needs of children, the Treehouse theme can be used by any type of organization, particularly if you want to take advantage of its color schemes, its responsiveness, and its theme-specific functionality (see below).

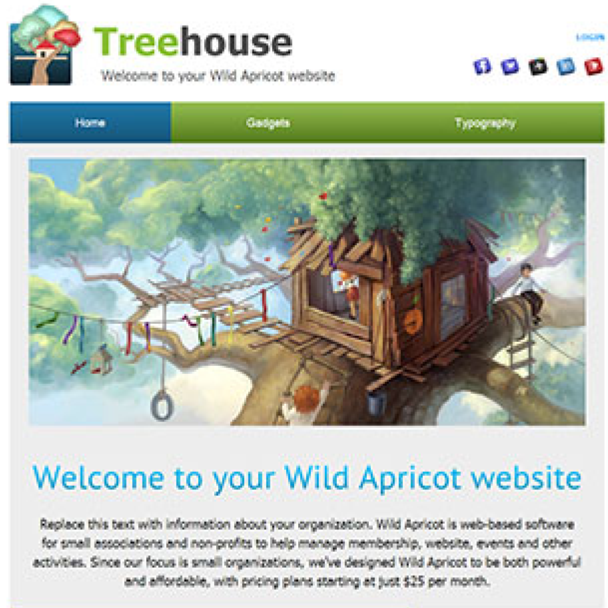


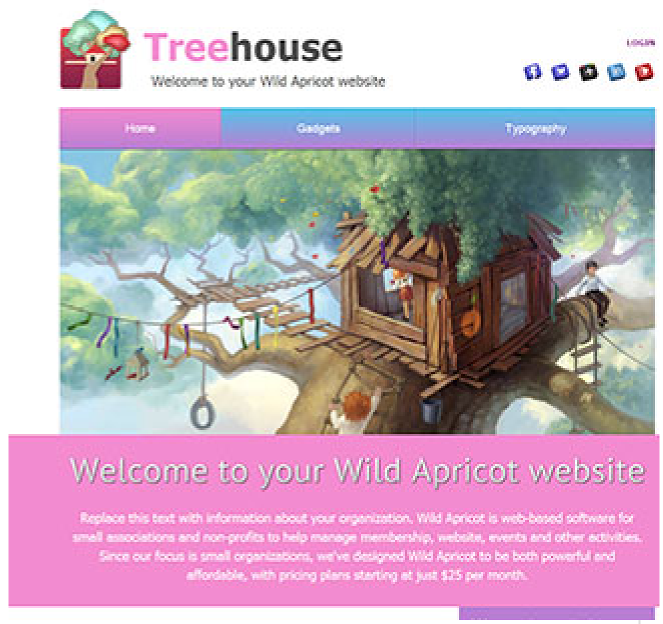
Themes within the theme set

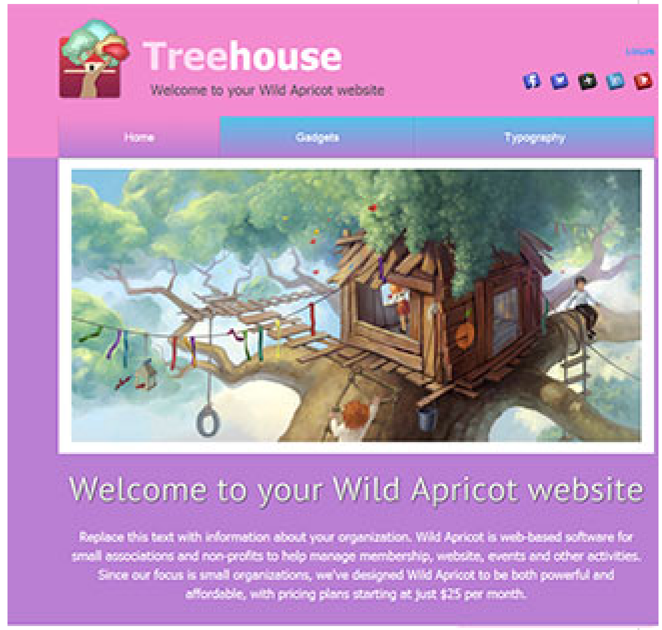
The Treehouse theme set consists of the following website themes:

Read more/less

Theme name	Preview

Clean	
Dark Wood	

Light wood	
Pink	

Purple	Treehouse Welcome to your Wild Apricot website Home Gadgets Typography Welcome to your Wild Apricot website Replace this text with information about your organization. Wild Apricot is web-based software for small associations and non-profits to help manage membership, website, events and other activities. Since our focus is small organizations, we've designed Wild Apricot to be both powerful and affordable, with pricing plans starting at just $25 per month.
Red	Treehouse Welcome to your Wild Apricot website Home Gadgets Typography Welcome to your Wild Apricot website Replace this text with information about your organization. Wild Apricot is web-based software for small associations and non-profits to help manage membership, website, events and other activities. Since our focus is small organizations, we've designed Wild Apricot to be both powerful and affordable, with pricing plans starting at just $25 per month.

Simple	
Textile	

Responsiveness

By default, responsiveness is enabled in all Treehouse themes (excluding the deprecated Treehouse themes). You can, however, disable the responsive behavior using theme overrides.

Read more/less

With responsiveness enabled, gadgets will be stacked within a single column on mobile devices, and resized to match the device's screen width. A mobile version of the site menu will be displayed, with a limit of 3 levels in total (main menu plus 2 submenu levels). Only horizontal menus are available for responsive themes.

To disable responsive behavior within Treehouse themes, follow these steps:

1. Enable theme overrides (if you have not done so already).
2. Click the link to download the theme files.
3. Unzip the theme files to a location of your choice on your computer or network.
4. Using a text editor, open the **basic.responsive.grid.less** file from the **Styles** folder.
5. Replace the following lines...

```
@state2-minwidth: 600px;
@state2-maxwidth: 959px;

@state3-maxwidth: 616px;
```

with...

```
@state2-minwidth: 0px;
@state2-maxwidth: 0px;

@state3-maxwidth: 0px;
```

6. Upload the modified **basic.responsive.grid.less** file to the **Styles** theme folder on your site via File management or WebDAV.
7. Click the **Rebuild theme** button on the **Theme overrides** screen.

The site will now appear the same regardless of device size.

Design elements

Bearing a signature of light and simple design, this theme set offers a lot of different color variations, from classic white and blues, to country style with wooden patterns, and finally even pink and purple variations.

Read more/less

Plain Arial font makes the sites readable on any device, and is familiar to many users. The sample picture on the home page can be used or replaced as you wish.

As well, Font Awesome – a font consisting entirely of icons – has been added to the theme. You can copy and paste icons from the **The me icons** page, which appears as a sample page when you create a site using this theme, or switch to it. To keep the icons readily available, you might want to keep this page as an admin-only non-menu page. For more information, see Using Font Awesome icons.

Theme-specific functionality

Treehouse themes provide theme-specific functionality, including:

Read more/less

- Alignment options for social profile, log in button, and log in form gadgets
- Orientation option – horizontal and vertical – for log in form gadgets
- Ability to hide the **Remember me** and **Forgot password** labels within log in form gadgets, and control whether the email and password labels appear within the entry fields, or outside them
- Font Awesome iconic font set for adding icons you can easily size and color

Customizing Treehouse themes

One of the most noticeable aspects of the Treehouse theme is its customization options. The Colors & styles settings are limited – providing no method for changing gadget titles or button colors – but the individual gadget style choices are immense, and include:

- 9 different menu styles for both vertical and horizontal layouts
- 18 pre-designed gadget styles to choose from – for gadgets other than system gadgets and singular gadgets
- 35 link button styles

These styles, combined with the ability to change the background color or image of any placeholder or layout, result in almost infinite number of possible design combinations.

You can also customize Treehouse themes using CSS and theme overrides .

On this page:

- Customizing Treehouse themes

Expand all sections

See also:

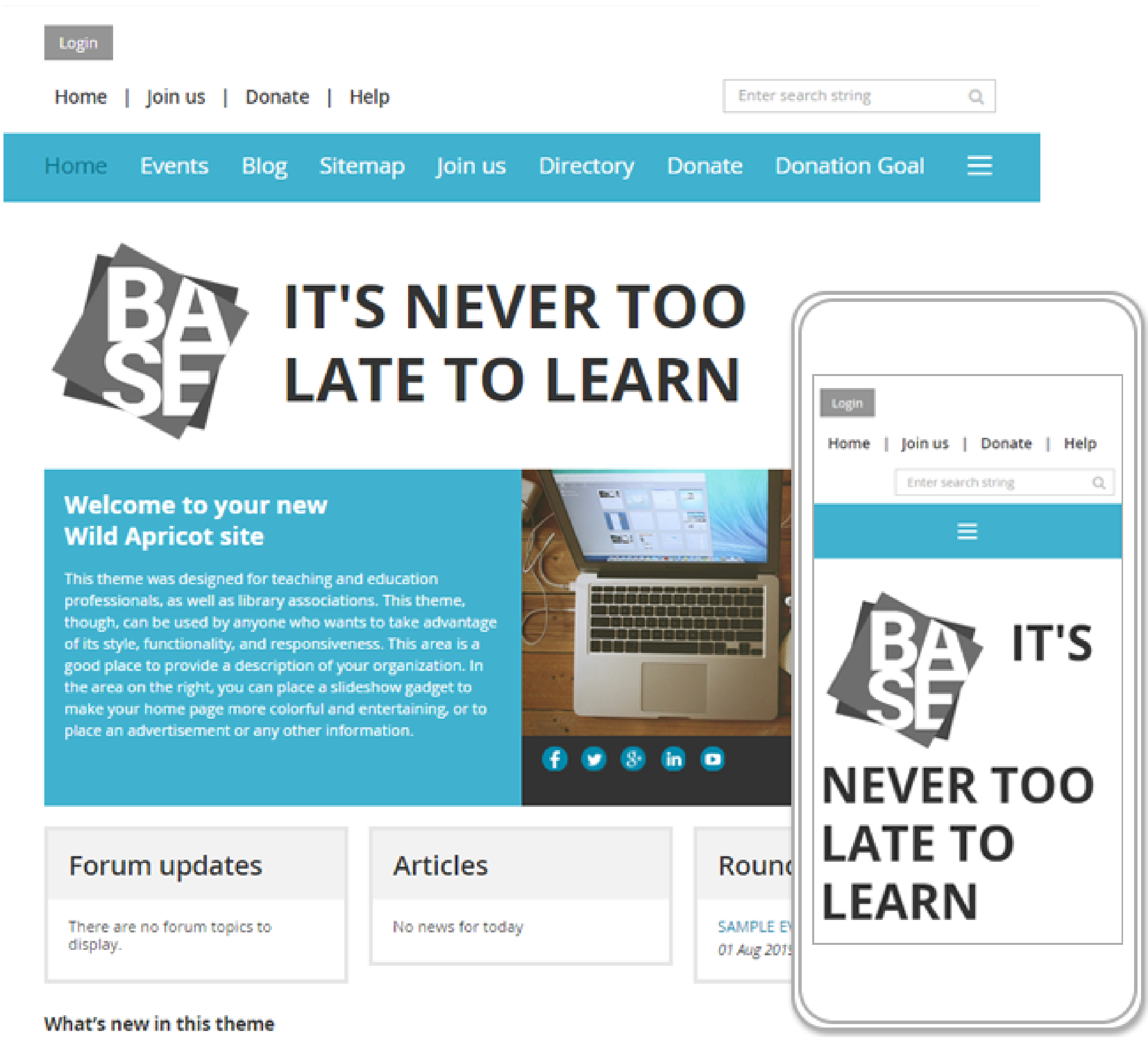
- Website themes
- Color and style settings for Treehouse themes

Whiteboard theme set

Whiteboard theme set

Whiteboard themes are simple and easily customized, yet fully responsive. Like the more complex Bookshelf themes, Whiteboard themes are mobile friendly and scale down automatically to different screen sizes.

The Whiteboard theme set is part of a series of themes designed for business and trade associations. Though designed with library and teacher associations in mind, Whiteboard themes can be used by any type of organization, particularly if you want to take advantage of its responsiveness and its ease of customization.



Themes within the theme set

The Whiteboard theme set consists of the following website themes:

Read more/less

Theme name	Theme colors
Maya Blue	
Knapsack Green	
Lunchbag Brown	

Responsiveness

By default, responsiveness is enabled in all Whiteboard themes. You can, however, disable the responsive behavior using theme overrides.

Read more/less

With responsiveness enabled, gadgets will be stacked within a single column on mobile devices, and resized to match the device's screen width. A mobile version of the site menu will be displayed, with a limit of 3 levels in total (main menu plus 2 submenu levels). Only horizontal menus are available for responsive themes.

To disable responsive behavior within Whiteboard themes, follow these steps:

1. Enable theme overrides (if you have not done so already).
2. Click the link to download the theme files.
3. Unzip the theme files to a location of your choice on your computer or network.
4. Using a text editor, open the **basic.responsive.grid.less** file from the **Styles** folder.
5. Replace the following lines...

```
@state2-minwidth: 600px;
@state2-maxwidth: 959px;

@state3-maxwidth: 616px;
```

with...

```
@state2-minwidth: 0px;
@state2-maxwidth: 0px;

@state3-maxwidth: 0px;
```

6. Upload the modified **basic.responsive.grid.less** file to the **Styles** theme folder on your site via File management or WebDAV.
7. Click the **Rebuild theme** button on the **Theme overrides** screen.

The site will now appear the same regardless of device size.

Design elements

The Whiteboard theme set is a simpler version of the Bookshelf theme set.

Read more/less

There is more white space, and no shadows or gradients. The gadget styles are simpler, with fewer styles to choose from. It makes for a great starting point for a fully customized yet responsive site.

For a modern look, we chose OpenSans as the base font.

Theme-specific functionality

Whiteboard themes provide theme-specific functionality, including:

Read more/less

- Secondary menu gadget
- Ability to hide the **Remember me** and **Forgot password** labels within log in form gadgets, and control whether the email and password labels appear within the entry fields, or outside them
- Expanded selection of gadget styles
- Theme-specific styles for slideshow gadget s
- Theme-specific menu styles
- Ability to control the colors and styles of elements within the upcoming events gadgets, recent blog posts gadgets, and forum updates gadgets through the Typography settings

Customizing Whiteboard themes

From the Colors and styles screen, you can customize the colors, fonts, styles, and backgrounds of various elements that appear throughout your site. For details, see Color and style settings for Bookshelf and Whiteboard themes.

You can also customize Whiteboard themes using CSS and theme overrides .

On this page:

Expand all sections

See also:

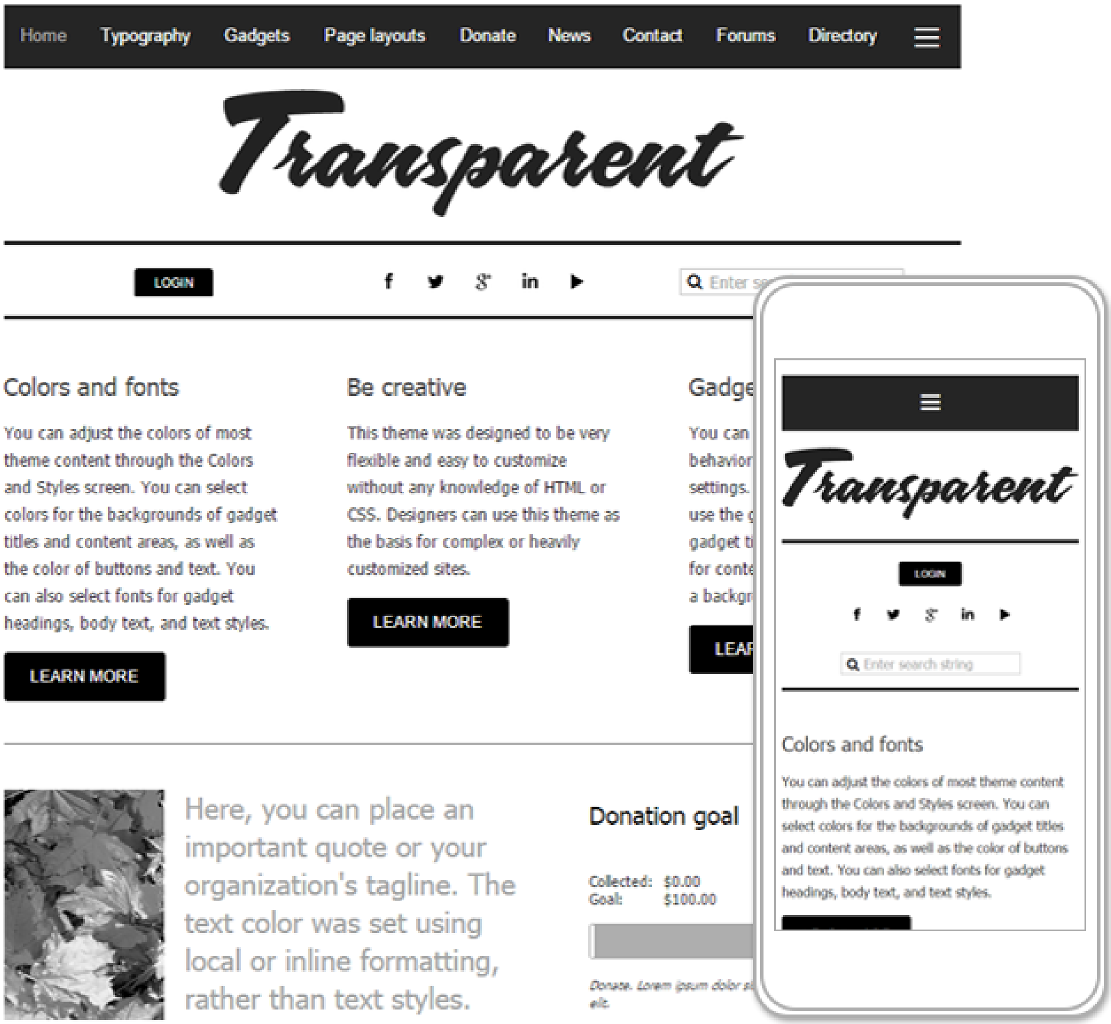
- Website themes
- Color and style settings for Bookshelf and Whiteboard themes

White Space theme set

White Space theme set

> The themes in the new White Space theme set are fully responsive and mobile friendly. This version supersedes the non-responsive version that was released earlier and is now being deprecated.

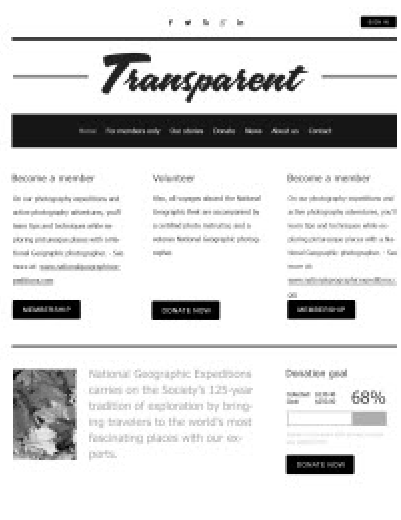
The White Space theme set provides an excellent starting point for designers and others who want to completely customize their website. Using simple colors and layouts, along with plenty of whitespace, these themes are fully responsive and mobile friendly.

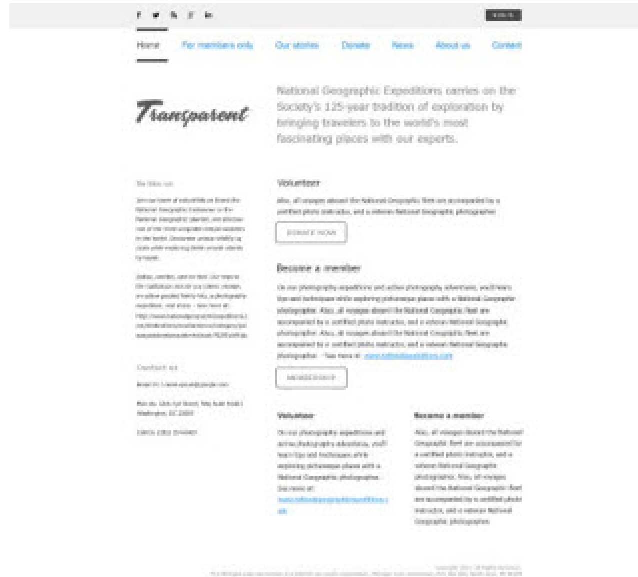
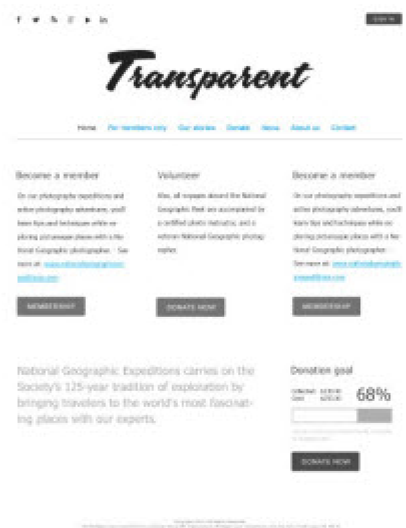


Themes within the theme set

The Clean Lines theme set consists of the following website themes:

Read more/less

Theme name	Preview
Black & White	

Clear Light	
Blue Accent	

Responsiveness

By default, responsiveness is enabled in all White Space themes (excluding the deprecated White Space themes). You can, however, disable the responsive behavior using theme overrides.

Read more/less

With responsiveness enabled, gadgets will be stacked within a single column on mobile devices, and resized to match the device's screen width. A mobile version of the site menu will be displayed, with a limit of 3 levels in total (main menu plus 2 submenu levels). Only horizontal menus are available for responsive themes.

To disable responsive behavior within White Space themes, follow these steps:

1. Enable theme overrides (if you have not done so already).
2. Click the link to download the theme files.
3. Unzip the theme files to a location of your choice on your computer or network.
4. Using a text editor, open the **basic.responsive.grid.less** file from the **Styles** folder.
5. Replace the following lines...

```
@state2-minwidth: 600px;
@state2-maxwidth: 959px;

@state3-maxwidth: 616px;
```

with...

```
@state2-minwidth: 0px;
@state2-maxwidth: 0px;

@state3-maxwidth: 0px;
```

6. Upload the modified **basic.responsive.grid.less** file to the **Styles** theme folder on your site via File management or WebDAV.
7. Click the **Rebuild theme** button on the **Theme overrides** screen.

The site will now appear the same regardless of device size.

Design elements

White Space, together with the Clean Lines and Dark Impact themes, forms part of a suite of simple themes that are flexible and easy to customize.

Read more/less

All of the simple theme sets provide a clear and modern look, with a single screen-wide background image that gives each site its signature look. The focus of the White Space set is on providing a baseline for a variety of different design choices. Using this bright, airy theme set, you can add any color accent to compliment your site style or logotype.

The typography of the theme is classic, with Tahoma and Georgia fonts used across all theme variations.

Theme-specific functionality

White Space themes provide theme-specific functionality, including:

- Alignment options for social profile and log in button gadgets
- Orientation option – horizontal and vertical – for log in form gadgets
- Font Awesome iconic font set for adding icons you can easily size and color
- Background color setting for functional buttons appearing on system gadgets and singular gadgets – e.g. Post, Next, Cancel, Register, Confirm

Customizing White Space themes

From the Colors and styles screen, you can customize the colors, fonts, styles, and backgrounds of various elements that appear throughout your site. For details, see Color and style settings for Clean Lines, White Space, Dark Impact themes.

You can also customize White Space themes using CSS and theme overrides .

On this page:

Expand all sections

See also:

- Website themes
- Color and style settings for Clean Lines, White Space, Dark Impact

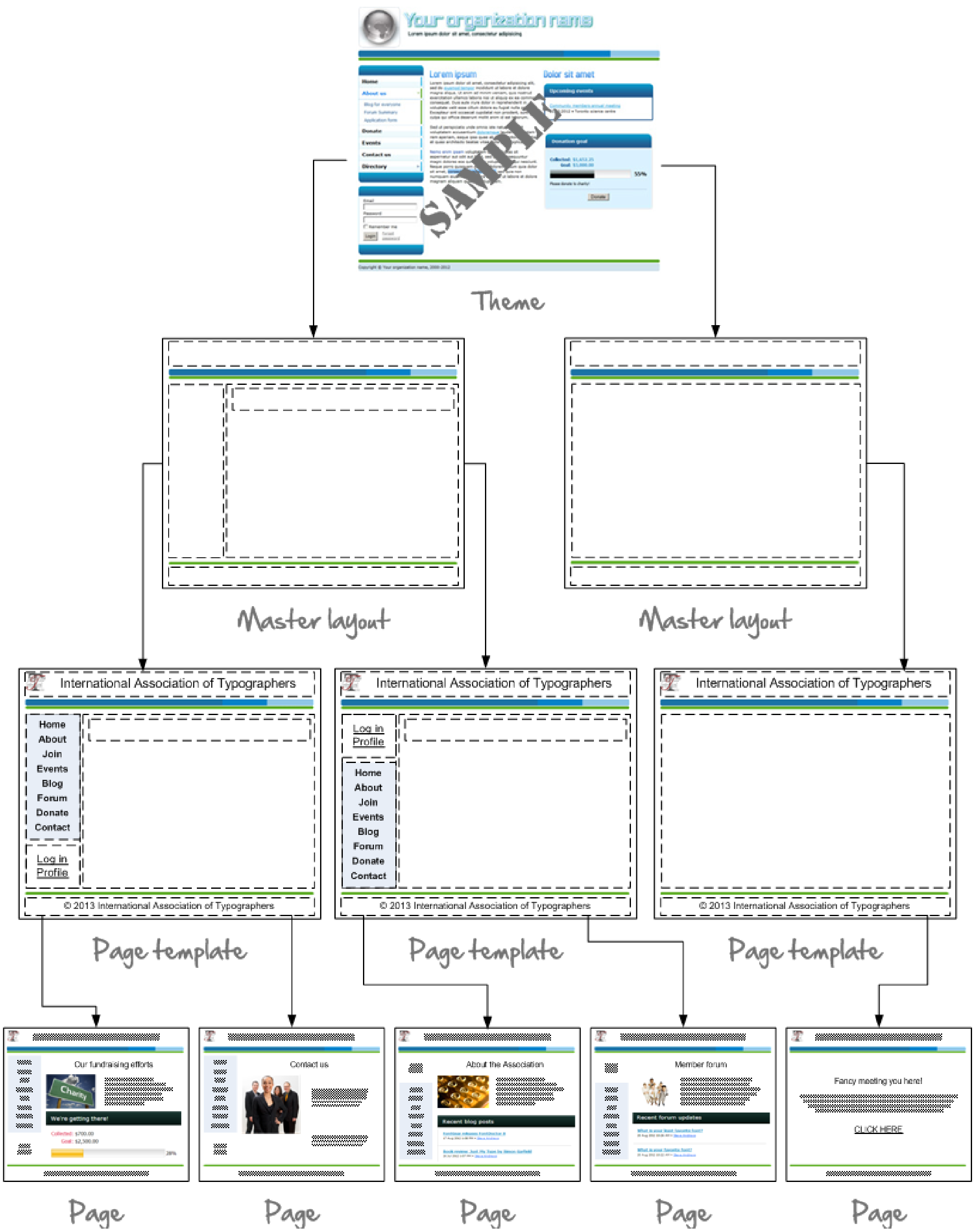
themes

Master layouts

Master layouts

Master layouts are important building blocks in the construction of your Wild Apricot site. Each website theme contains multiple master layouts, which define the basic layout of pages, and contain some of the graphical elements common to the theme.

For example, you may have three master layouts in your system – one with a sidebar, header and footer, another with a header and footer but no sidebar, and one for landing pages, with nothing except a single content area. Master layouts form the basis for page templates, in the same way that page templates form the basis for pages.



Within a master layout – and consequently, within page templates – the areas in which content can be placed are defined by *placeholders*. Placeholders are specially defined areas that serve as containers into which gadgets and layouts can be dropped when editing a page template or page.

Master layouts are not accessible through a graphical interface but can be modified through theme overrides. For instructions, see Customizing master layouts. You can also change the background colors and images used in master layouts from the Colors and styles screen. For more information, see Setting the site background.

See also:

- Website themes
- Page templates
- Layouts

Managing site pages

Managing site pages

From the **Site pages** screen, you can add, customize, and delete pages appearing on your Wild Apricot site. For each page, you can control various page settings, including page name, URL, access permissions, and meta-tags. You can also control whether the page appears in your site menu.

To access the **Site pages** screen, click **Site pages** under the **Website** menu.

You can add up to 1,500 site pages. You can group site pages under one another to form multi-level menus.

New trial accounts come with a few sample pages to help you get started. You can modify these pages or delete them as needed.

For information on designing individual pages, see Designing site pages.

Adding site pages

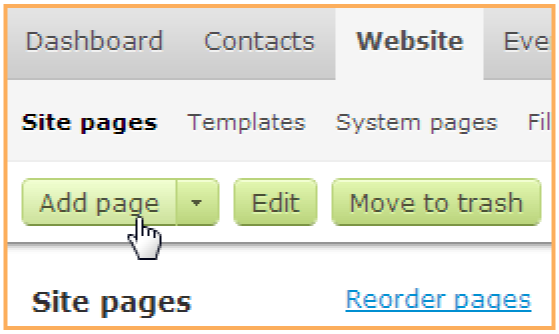
You can create a completely new page or duplicate an existing page. When you add a new page, you can select the template whose content and layout the new page will inherit. You can also control various page settings, including whether and where the page appears in your site menu. When you duplicate an existing page, you can modify the duplicate page without affecting the existing page.

Adding a new page

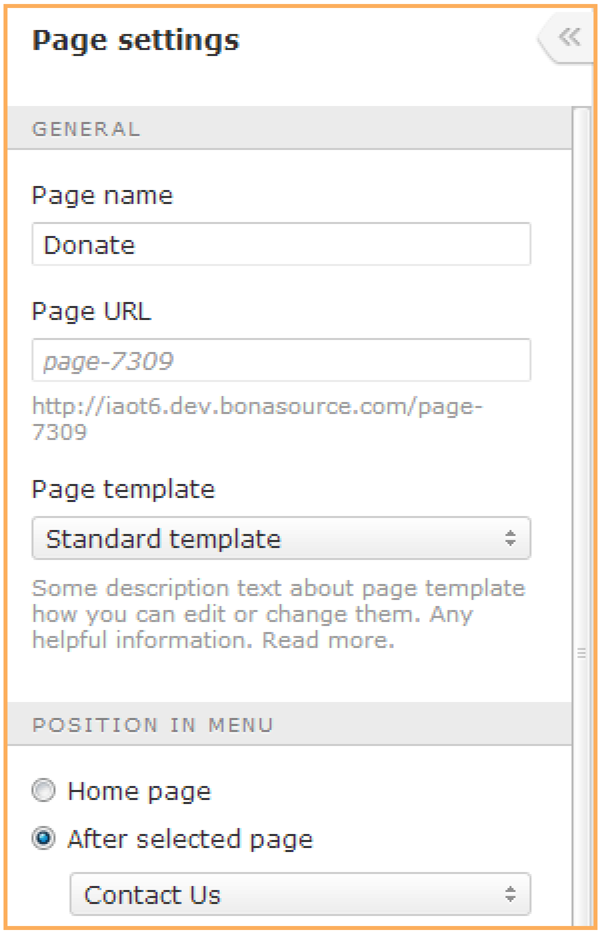
To add a new page to your Wild Apricot site, follow these steps:

Read more/less

1. From the **Site pages** screen, click the **Add page** button.



2. Review and modify the page settings along the left side of the screen.

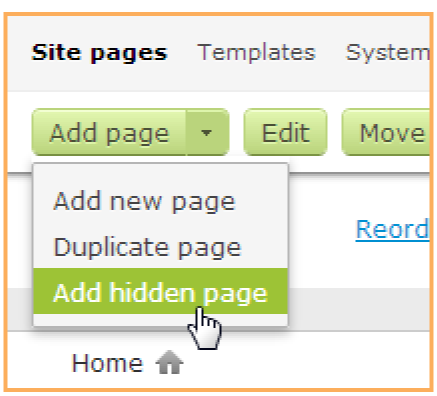


The new page will inherit the layout and content of the page template you choose. By default, the new page will be positioned after the currently selected page within the site menu.

3. Add Layouts to divide your page into sections.
4. Add Gadgets to display dynamic or static content.
5. Click **Save** to save your changes.

The web page will now appear on your site – unless you have chosen to hide it – subject to any access restrictions you have set.

To add a new page that is set to be excluded from your site menu, click the drop-down arrow beside the **Add page** button and select the **Add hidden page** option.



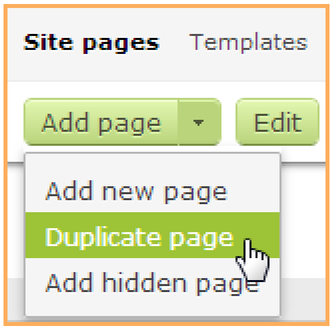
You can exclude any page from your site menu by changing the **Position in menu** setting to **Not in menu**.

Duplicating a page

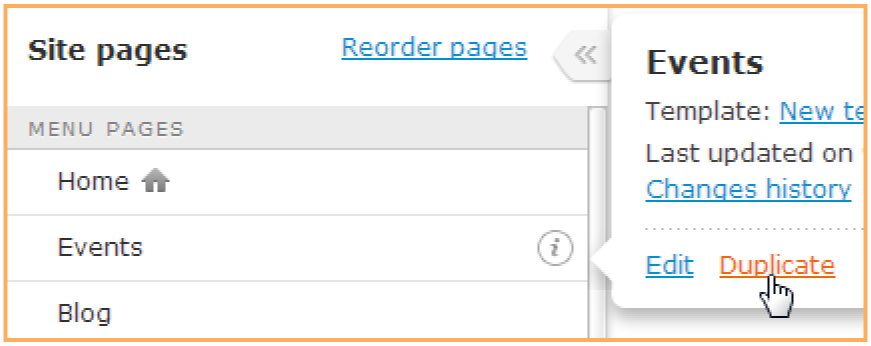
To duplicate an existing site page, follow these steps:

Read more/less

1. Within the site page list on the left side of the **Site pages** screen, click the existing page that you want to duplicate.
2. Click the drop-down arrow beside the **Add page** button and select the **Duplicate page** option.



Alternatively, you could hover over the page you want to duplicate then hover over its info icon and click the **Duplicate** option.



In either case, the new duplicate page will now appear below the existing page within the page list. You can now modify it as you choose. For instructions on modifying site pages, see below.

Modifying a site page

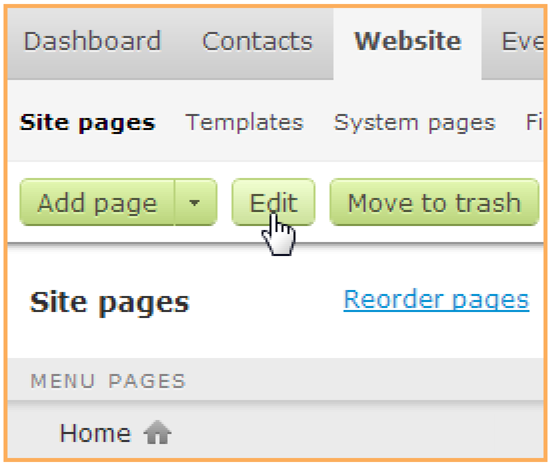
To modify an existing site page, follow these steps:

Read more/less

1. Within the site page list, click the page that you want to modify.

> If the page you want to select is grouped under another page, you may have to click the plus sign beside the parent page to display its subpages.

2. Click the **Edit** button.

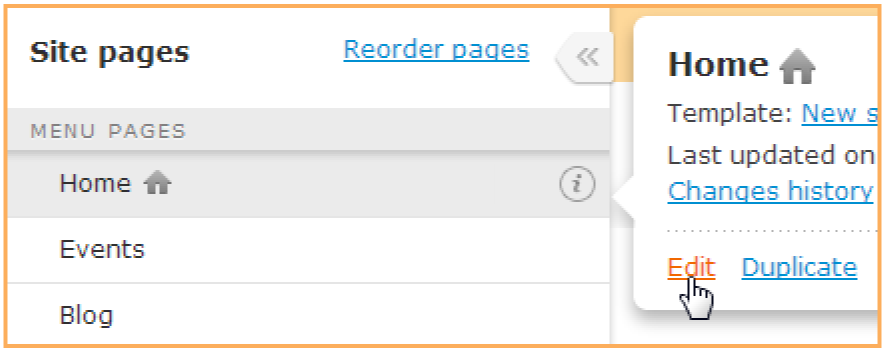


3. You can now add, remove, and modify the gadgets appearing on the page. Gadgets can be placed into, above, or below layouts.

For content gadgets, you can directly modify the content – including its HTML code – using the content editor. For all gadgets, you can control aspects of its appearance and behavior by adjusting the gadget settings, or other related settings. For each page, you can also adjust the page settings, including the page template used as the foundation for the page. For more information, see Designing site pages.

4. When you are finished modifying the page and its contents, click **Save** to save your changes.

Alternatively, you could hover over the page you want to modify then hover over its info icon and click the **Edit** option.



Page settings

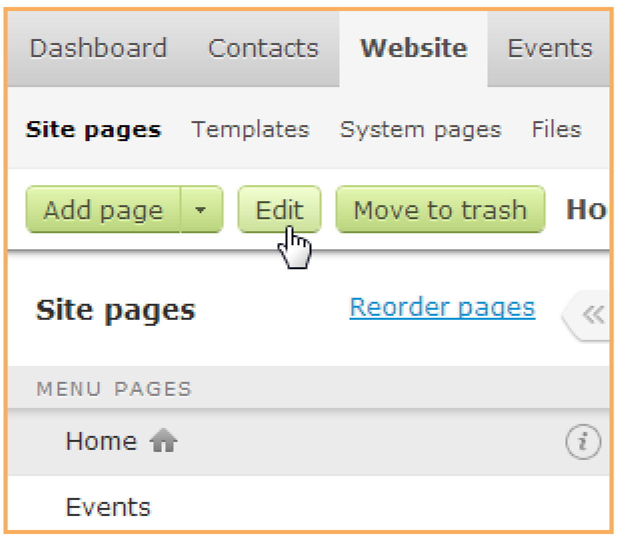
Page settings controls various aspects of a page including visibility and access.

Read more/less

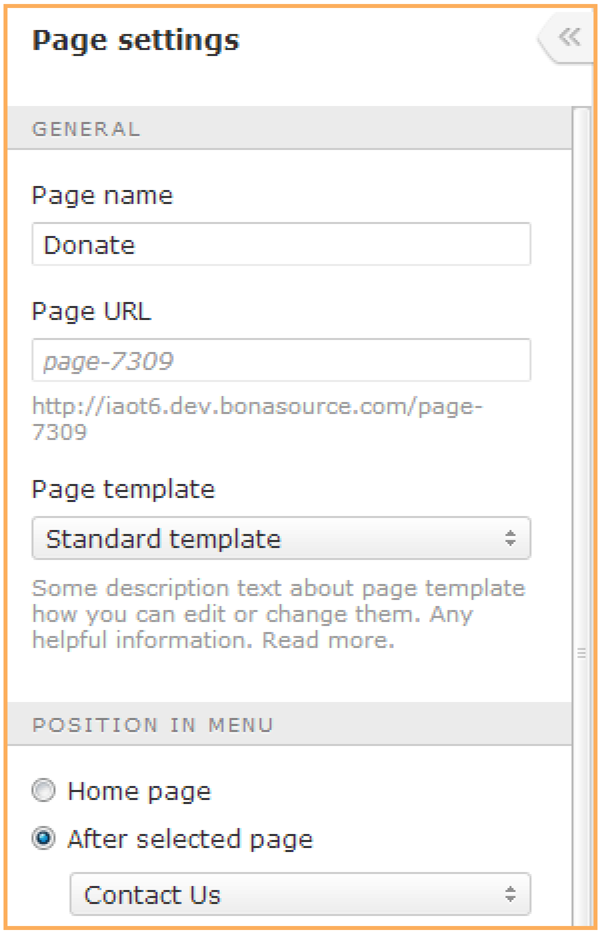
Viewing page settings

To view the page settings for a page, select the page within the **Site pages** list and click the **Edit** button.

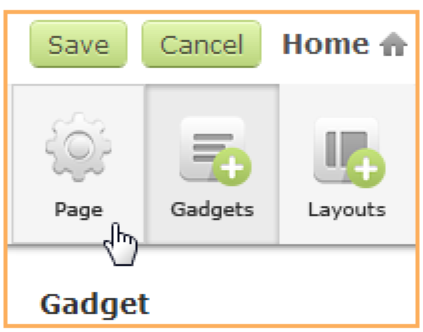
Read more/less



The page settings will appear in a panel along the left side.



If you are already editing the page and the page settings are not displayed along the left side – maybe you're currently displaying the list of available gadgets – click the **Page** icon towards the top of the screen.



Once you are finished modifying the page settings, click the **Save** button to save your changes.

Available page settings

The following page settings are available:

Read more/less

Setting	Description

Page name	The name of the page as it appears in the site menu and within the breadcrumbs that show your current location within the site hierarchy. 
Page URL	The name of the page within the page URL. The value you enter here will be combined with your Wild Apricot domain name to form the complete page URL. For example, if you enter *About* in this field, and your Wild Apricot domain name is https://stevelivetestsite.wildapricot.org, then the complete page URL will be https://stevelivetestsite.wildapricot.org/About. You cannot use the same page URL for multiple pages within your site. For more information, see Custom URLs.
Page template	The page template to be used as the basis for this page. The page will inherit the template's content and layout. Switching to a different page template after you have begun modifying the page may result in layouts and gadgets changing position within the page. Switching back to the previous page template may not restore them to their previous positions. You can, however, restore a version of the page that was saved prior to switching templates.
Position in menu	The location of this page within your Wild Apricot site menu. You can position the page after another page, group it under another page, or designate it as the home page. You can also choose to exclude or hide this page from the site menu altogether. For more information, see Page access and visibility.

Access level	Controls what type of visitor – members, administrators, the general public – can view the page, whether through the site menu or directly via a page URL. If you choose the **Restricted** option, check boxes will appear for each membership level and member group you have set up. To restrict access to particular membership levels or member groups, check each of the levels and groups you want to grant access to. If you restrict access by both membership levels and member groups, then members who belong to any of the selected levels **or** groups will be able to access the page. If you check the **All levels** or **All groups** option then all levels or groups – including any levels or groups added in the future – will be selected. If a visitor to your site does not have permission to access a page, it will not appear in the site menu for that person. Your site menu, therefore, may display different sets of pages depending on whether the visitor is logged in as a member or not, and what their membership level is. For more information, see Page access and visibility.
Meta-tags	You can assign meta-tags to be applied to the page. Meta-tags are HTML elements used to provide information about a page, redirect a page, and load scripts or styles. You can also assign global meta-tags that are applied to all pages. For more information, see Defining meta-tags.

Reordering and grouping menu pages

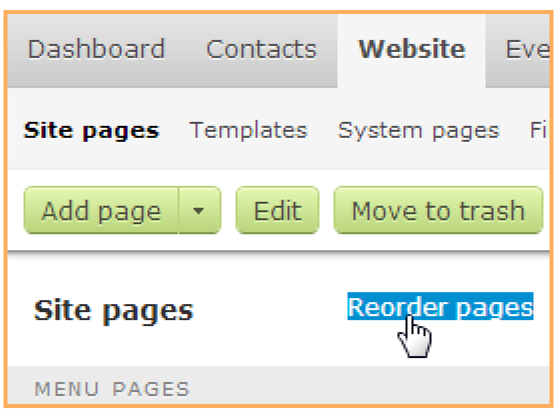
You can change the order of pages on your Wild Apricot site menu, and group Wild Apricot site pages under one another to form multi-level menus.

Read more/less

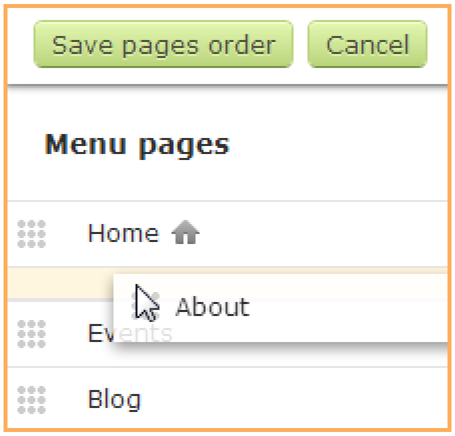
Reordering menu pages

To change the order of the pages in your site menu, click the **Reorder pages** link on the Site pages screen.

Read more/less



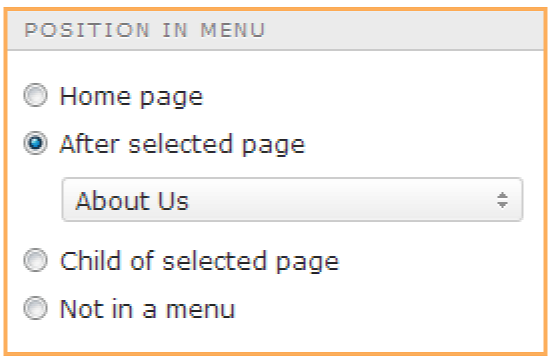
Now, drag and drop pages to the desired location within the menu.



To make a page the home page, drag it to the top of the menu.

Once you are finished reordering pages, click the **Save page order** button.

You can also control a page's position within your site menu – and designate it as your home page – through its page settings. Using the options under **Position in menu**, you can place the page after another page or remove it from the menu altogether.

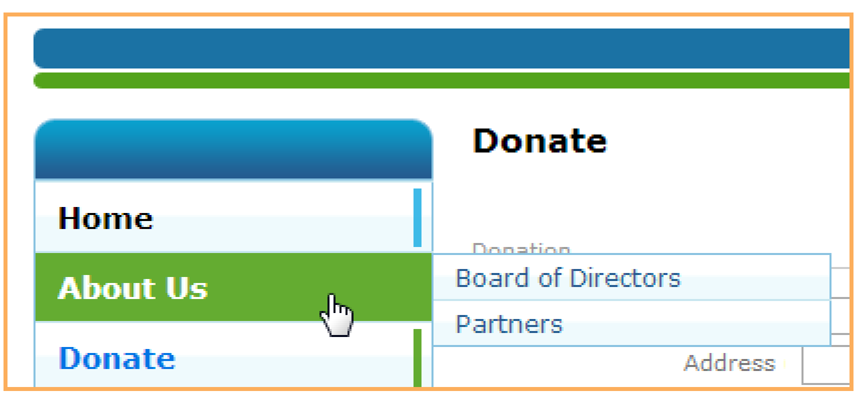


Administrators with limited access can only reorder the pages to which they have been granted access.

Creating multi-level menus

You can create multi-level menus so that options appear grouped under other options.

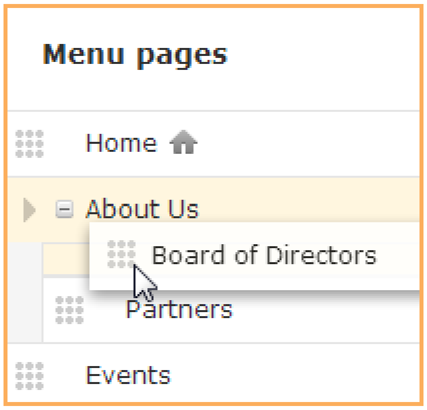
Read more/less



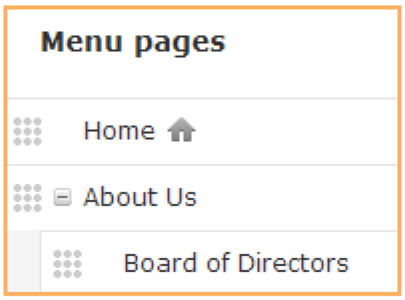
You can create as many levels of menu options as you wish, though older themes may not proper display more than 3 menu levels.

Within multi-level menus, a top-level menu option is still clickable and links to a separate page. In the above example, clicking **About Us** displays a different page than clicking **Board of Directors** or **Partners** does.

To create a multi-level menu, click the **Reorder pages** link on the **Site pages** screen. Next, drag the page you want to be a submenu option to the right of the page you want to act as the parent menu option.

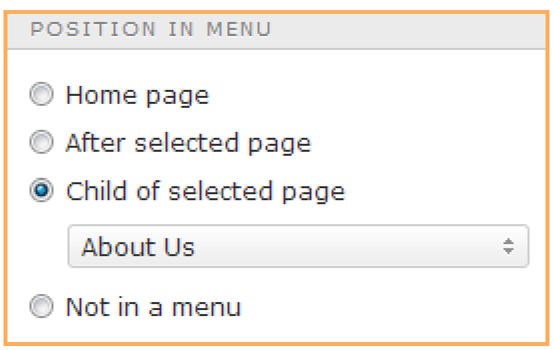


Once a triangle appears to the left of the parent page name, you can release your mouse button. After you drop the page, it will appear grouped under the parent menu option, both within the page list and in your site menu.



You can click the minus sign beside the parent page to collapse the list of subpages, and click the plus sign to expand it.

You can also group a page under another page through its page settings. Under **Position in menu**, click the **Child of selected page** option and select the page you want to group it under.



Controlling page access and visibility

For each page on your Wild Apricot site, you can control whether it appears in your site menu, and the type of users who can access it. You can restrict page access to certain membership levels or member groups, or to site administrators only. Page access and visibility is controlled through page settings.

Read more/less

Controlling whether a page appears in your site menu

You can hide sites pages so they don't appear as options in your site menu, but are still accessible via a direct link.

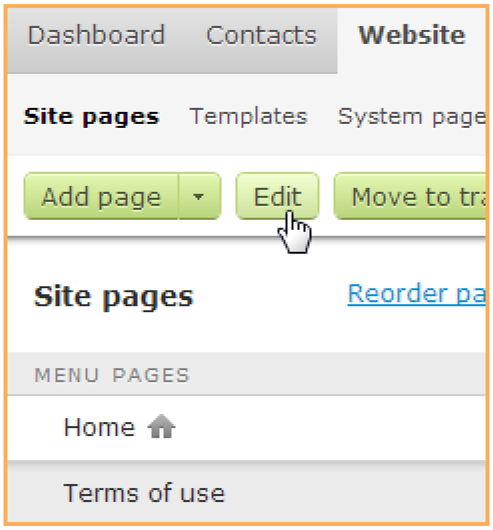
Read more/less

For example, you might want to have your terms of use and privacy policy pages appear as links on your page footer but not in your menu.

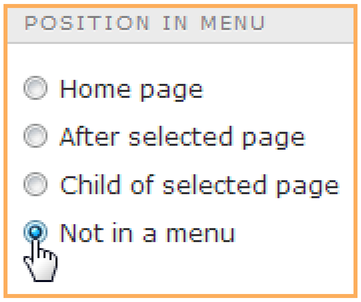
To control whether a page appears in your site menu, follow these steps:

1. Go to Site pages and select the page within the list.

2. Click the **Edit** button towards the top of the screen.



3. Using the **Position in menu** options that appear within the page settings on the left, choose where you want the page to appear within your site menu, or click the **Not in menu** option to exclude the page from the menu.



4. Click the **Save** button to save your changes.

> ⚠ Page settings automatically appear when you create a new page or begin editing an existing page.

For more information on managing your site menu, see Reordering and grouping menu pages.

Controlling page access

For each page on your site, you can control the type of users who can access it. You can restrict page access to certain membership levels or member groups, or to site administrators only.

Read more/less

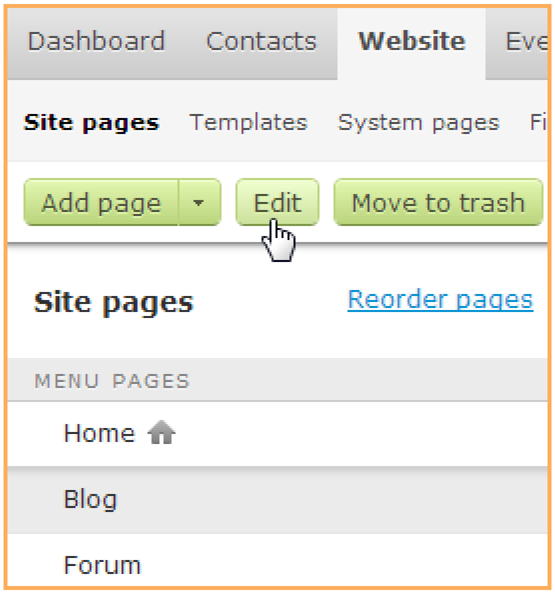
> ⚠ Access restrictions apply to the page itself and not to any resources (graphics, links, etc.) appearing on the page. Resources appearing on a restricted page can theoretically be accessed by non-members using a URL.

Restricted pages will not appear as menu options for authorized members until they log in.

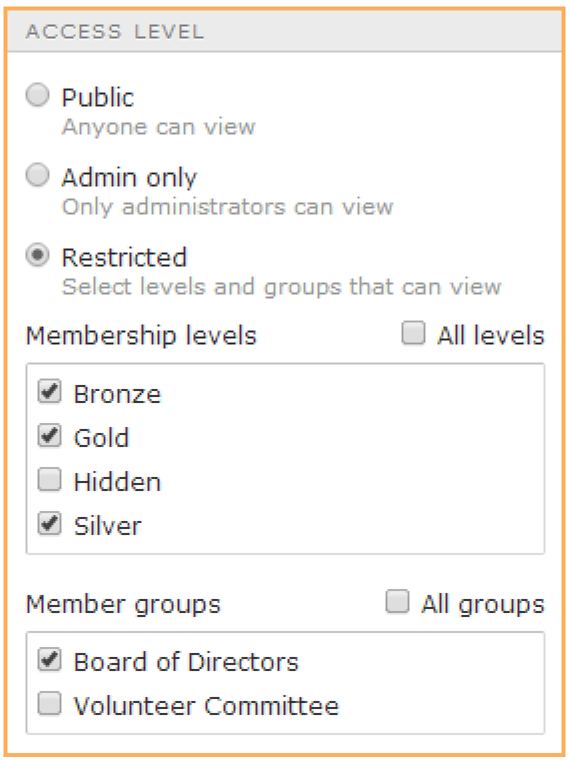
> ⚠ It is not advisable to restrict your home page to members only. Instead, your home page should provide a log in button or log in form for members to log in and view member-only content on other site pages.

To restrict access to a particular page, follow these steps:

1. Go to Site pages and select the page within the list.
2. Click the **Edit** button towards the top of the screen.



3. Using the **Access level** options that appear within the page settings on the left, choose the type of users that can view the page.



4. Click the **Save** button to save your changes.

Page settings automatically appear when you create a new page or begin editing an existing one.

The following access levels options are available:

Option	Description
Public	Anyone can view the page, whether they are members or not, and logged in or not.

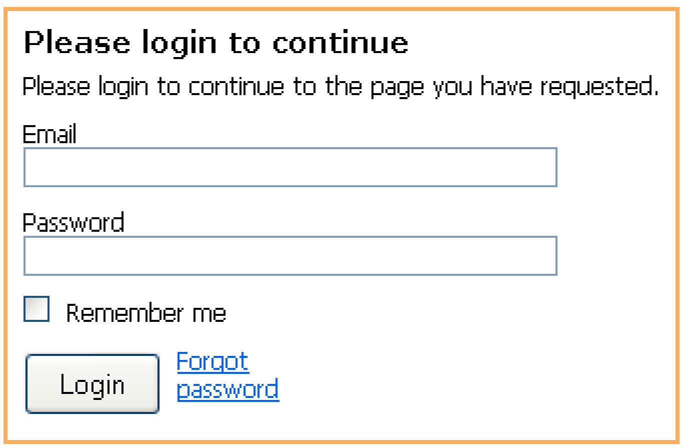
Admin only	The page can only be viewed by a site administrator. For all others, the page will not appear in the site menu. You might want to leave new pages as **Admin only** while you are setting the page up so you can preview it before it goes live.
Restricted	Only contacts who belong to one of the selected membership levels or member groups can view the page. When you click this option, check boxes appear for each membership level and member group you have set up. Check each of the levels and groups you want to grant access to. If you restrict access by both membership levels and member groups, then members who belong to any of the selected levels **or** groups will be able to access the page. If you check the **All levels** or **All groups** option then all levels or groups – including any levels or groups added in the future – will be selected.

Restricted pages will not appear as menu options for authorized members until they log in. To provide visible access to restricted pages, so that visitors and logged out members know they exist, you can create an unrestricted page with links to the restricted pages.

Customizing the authorization required page

When someone tries to connect to a restricted page and is not logged in, a page will appear instructing them to log in order to view the page.

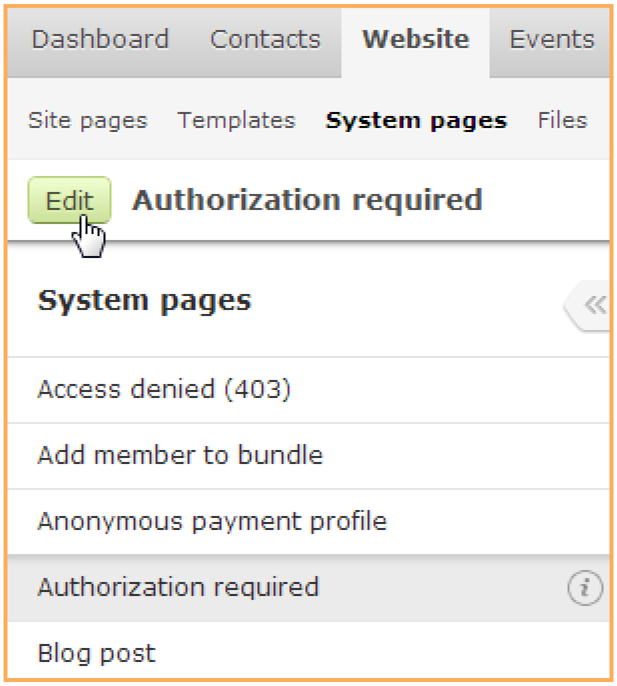
Read more/less



You can modify the title and instructions displayed on this page, and add any other content you wish. You cannot, however, modify or remove the login form.

To customize the authorization required page, follow these steps:

1. Click System pages under the **Website** menu.
2. Within the list of system pages, click the **Authorization required** entry.
3. Click the **Edit** button to enter edit mode.



4. Click the content gadget containing the heading and instructions, and modify them as required. For instructions, see Using the content editor. You can add other gadgets as well, but you cannot modify or delete the system gadget containing the log in fields.
5. Click the **Save** button to save your changes.

Alternatively, you could enter edit mode by hovering over the **Authorization required** entry then hovering over its info icon and clicking the **Edit** option.

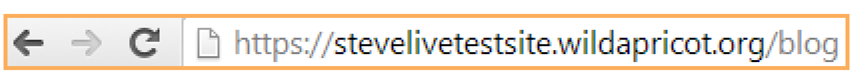
Setting custom page URLs

When you create a web page in Wild Apricot, its URL – its Internet address – is created automatically in the form of http://yourdomain/page-41160 (where *yourdomain* is your Wild Apricot domain name, and *41160* is the page ID). You change the page address to something more memorable by specifying a custom URL.

Read more/less

For example, instead of...

...you could provide your blog page with a custom URL of *blog* so that its page address becomes:



Specifying a custom URL can improve your rankings in search engines, particularly if you use relevant keywords (e.g. *typography* for a typography blog). You can also use custom URLs if you are transitioning from a non-Apricot site and want to keep the same page URLs.

Once you change the page URL from the numeric default to a custom ID, the original numeric page ID will continue to function, and will redirect to the custom ID you assign.

Specifying a custom URL

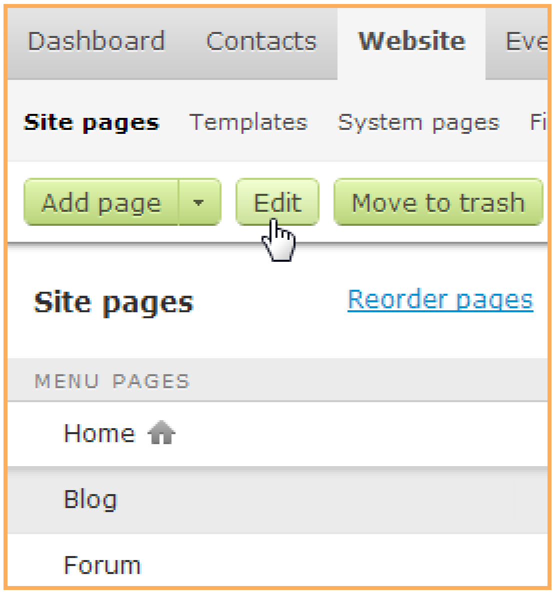
You can assign a custom URL to any Wild Apricot page including the homepage.

Read more/less

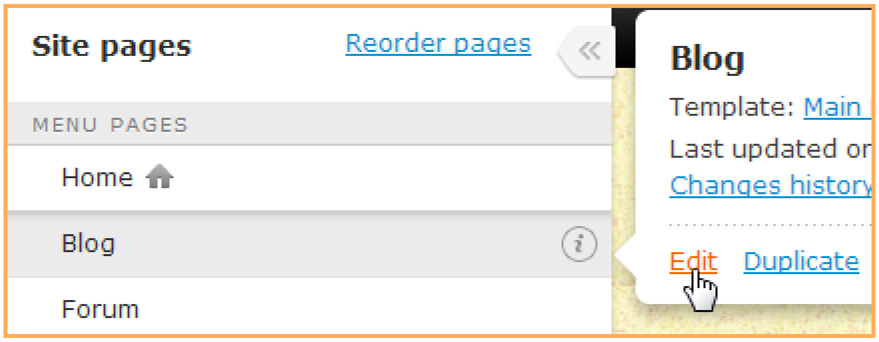
You cannot, however, assign a custom URL to individual events or blog posts.

To specify a custom URL for a page:

1. Go to Site pages and select the page within the list.
2. Click the **Edit** button towards the top of the screen...



...or hover over the page then hover over its info icon and click the **Edit** option.



3. In the **Page URL** field within the page settings on the left, enter the portion of the URL that follows the slash. If you want the URL to be http://yourdomain/blog, you would just enter *blog*.

4. Click the **Save** button to save your changes.

> The full URL of the page appears below the **Page URL** field.

Custom URL restrictions

Read more/less

Format

- The page URL must be unique within your site.

You can use:

- any extension (e.g. html, php, jsp, do) except for reserved extensions listed below
- sub-folders in the path (e.g. you can specify a custom URL of /Typography/blog)

You cannot use:

- double slashes in path (e.g. /Typography//blog)
- extensions reserved for resource files:

```
config, asmx, axd, jpeg, jpg, png, bmp, gif, swf, js, css
```

- reserved system URLs starting with:
  - /Admin/
  - /App_Themes/
  - /Captcha/
  - /Common/
  - /Content/
  - /Default.aspx
  - /DES/
  - /DESGetFiles.aspx
  - /DocumentHandler.ashx
  - /EmailTracker/
  - /Errors/
  - event-
  - /Info/
  - /KeepSessionAlive.ashx
  - /Logs/
  - /Payments/
  - /PromoBannerHandler.ashx
  - /Resources/
  - /RadControls/
  - /SupportTicketsHandler.ashx

- /Sys/
- /ViewEvent.aspx
- /WebDav/
- /Widget/

Characters

You can use:

- Latin characters
- numbers
- any of the following special characters:

```
- _ = + ~ ! @ $ & * ( )
```

You cannot use:

- non-latin characters
- any special characters not listed above

Defining meta-tags

Meta-tags are HTML elements used to provide information about a page, redirect a page, and load scripts or styles. Meta-tags includes the keywords used to describe your site to search engines. The keyword meta-tag is one of the factors (though not an important one) in optimizing your site's search engine rankings.

You can assign global meta-tags to be applied to all pages on your Wild Apricot site, and override the global meta-tags for individual pages.

Read more/less

Assigning global meta-tags

To assign global meta-tags – so that the meta-tags are applied to all pages – follow these steps:

Read more/less

1. Click the **Settings** tab.
2. Under **Site settings**, click **Meta-tags**.
3. On the screen that appears, you can enter the following information:

Section	Description	Example
Keywords	Site keywords to be inserted for every page in the <meta name="keywords"> tag. Use commas to separate multiple keywords (and keyword phrases).	typographers association,typography association,typeface designers,font designers,typography,typographers,fonts,typefaces,typographer
Description	Description to be inserted for every page in the <meta name="description"> tag.	International Association of Typographers - association for typographers, typeface designers, font designers, and other typography professionals
Raw Headers	HTML code to be inserted for every page in the <head> tag. You can insert code here to redirect a page, insert widgets for social media sites such as Facebook, and add a favorites icon – also known as a favicon, shortcut icon, or website icon – to the page tab and address bar for your site.	<link rel="shortcut icon" type="image/ico" href="/Resources/Pictures/favicon.ico" />

4. If you want to overwrite the existing keywords, descriptions, or raw headers for all pages on your Wild Apricot site, click **Reset all pages to use this**. If you don't click this button, any customizations you have made to meta-tags on individual pages

will be retained, and the changes you make here will not be applied to those pages.

5. Click **Save** to save your changes.

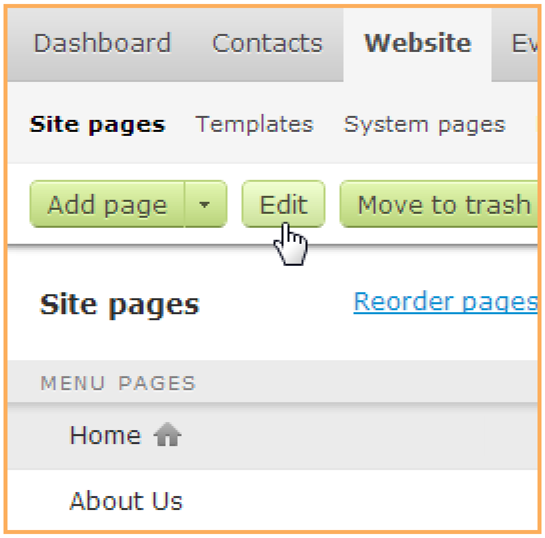
Assigning meta-tags to individual pages

You can override the global meta-tags and apply different meta-tags to individual pages on your site.

Read more/less

To assign custom meta-tags to individual pages, follow these steps:

1. Go to Site pages and select the page within the list.
2. Click the **Edit** button towards the top of the screen.



3. In the **Meta-tags** section within the page settings on the left, you can enter the following information:

Section	Description	Example
Page title	By default, the page title inserted in the <title> tag and displayed on the page tab in your browser is formed by combining your organization name and the page name, as defined in Page management. If you want to specify your own page title without changing the page's menu name, uncheck **Automatic** and enter a title.	Home of the IAT
Description	Description to be inserted in the <meta name="description"> tag. If you want to override the global description, uncheck **Use default** and enter a description for this page.	International Association of Typographers - association for typographers, typeface designers, font designers, and other typography professionals
Keywords	Site keywords to be inserted in the <meta name="keywords"> tag. If you want to override the global keywords, uncheck **Use default** and enter the keywords for this page. Use commas to separate multiple keywords (and keyword phrases).	typographers association,typography association,typeface designers,font designers,typography,typographers,fonts,typefaces,typographer

Raw Headers	HTML code to be inserted in the <head> tag. You can insert code here to redirect a page, insert widgets for social media sites such as Facebook, and add a favorites icon – also known as a favicon, shortcut icon, or website icon – to the page tab and address bar for your site. If you want to override the global raw headers, uncheck **Use default** and enter the raw headers for this page.	<link rel="shortcut icon" type="image/ico" href="/Resources/Pictures/favicon.ico" />

4. Click the **Save** button to save your changes.

Search engine optimization

Search engine optimization (SEO) is the process of improving the position of your website in search engine rankings.

Read more/less

The Wild Apricot platform has been designed to be search engine friendly so that content of your site will easily be read and indexed by search engine crawlers, whatever account plan you use. Even so, there are a number of things you can do to optimize your site's rankings. These include:

- Make your site interesting and relevant to your target audience.
- Update your site regularly.
- Persuade other related sites to link to it.
- Use a custom domain name rather than a wildapricot.org subdomain.
- Assign custom URLs to your pages using relevant keywords (e.g. Typography for a typography forum).
- Use meta-tags to define site keywords that match search strings your target audience is likely to use. Keywords should be broad enough to attract a wide range of visitors but not so general that your site gets lost in the crowd. For example, if you set up a site for the International Association of Typographers, you might use targeted keywords like "typographers association", "typeface designers", and "font designers" (along with obvious ones like "typography" and "typographers") but avoid generic ones like "association" and "international".
- Set custom page titles that incorporate your keywords without overloading them (a practice known as *keyword stuffing* that gets penalized by search engines). For the International Association of Typographers, you might want to title the home page "IAT - association for typographers, typeface designers, font designers, and other typography professionals".

Redirecting a page

You may want to redirect a page on your Wild Apricot site so that clicking its menu option links to a page on another site. Your organization might have several local websites and consequently you want to include a menu option on each that links to a central website.

Read more/less

To redirect a page on your Wild Apricot site, follow these steps:

1. Create a new empty page. You may need to create a blank template first, since pages inherit content from a template.
2. Within the page settings for the new page, enter a **Page name** – the name that will appear in your site menu.
3. Find the **Meta-tags** section and uncheck the **Use default** checkbox beside **Raw headers** .
4. In the **Raw headers** code box, enter the following code:

```
<script type="text/javascript">
  try {
    if (!top.adminpanel) {
      window.location = "redirect URL";
    }
  }
  catch(e) {}
</script>
<noscript>
  <meta http-equiv="Refresh" content="0"; URL="redirect URL">
</noscript>
```

where *redirect URL* is the URL of the page you want to redirect to (e.g. http://yoursite.com). If you are redirecting to an external page, the URL must begin with either http:// or https://. If you are redirecting to a page on your Wild Apricot site, the URL should be */pageURL* where *pageURL* is the page URL of your Wild Apricot page. Note that there are two places in the code where you need to enter the URL.

> Make sure you do not make a cyclical redirect to the same page.

5. Click the **Save button** to save your changes.

Clicking the menu option for this page should now redirect it to the URL you entered.

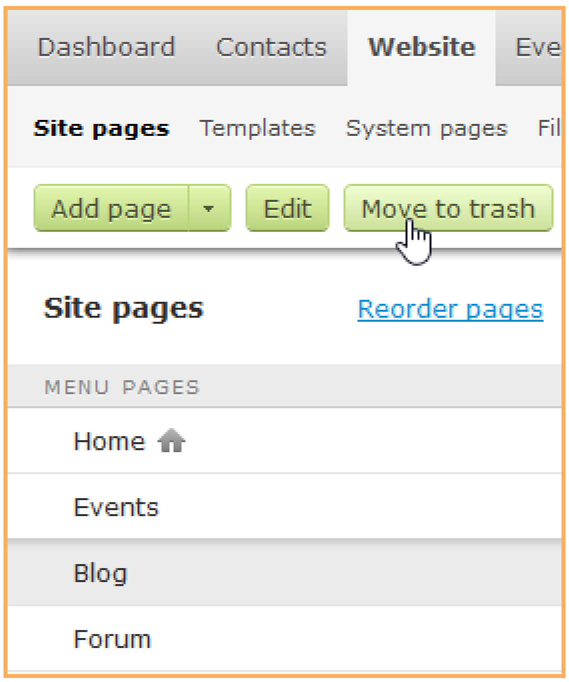
> The redirect will not work when you are logged in as an administrator. To test it, you need to log out and try it as a public visitor or a member.

Removing a page

To remove a site page, follow these steps:

Read more/less

1. Within the site page list, click the page that you want to remove.
2. Click the **Move to trash** button.



3. From the trash, you can view the deleted page, and restore it or empty the trash.

Restoring pages

You can restore deleted pages and templates and previous versions of pages and templates.

Read more/less

Restoring deleted pages

When you delete a page or page template, it is moved to the trash. From the trash, you can preview the deleted page or template, and restore it or empty the trash.
You can also restore previous versions of pages that have not been deleted. For more information, see Version history.

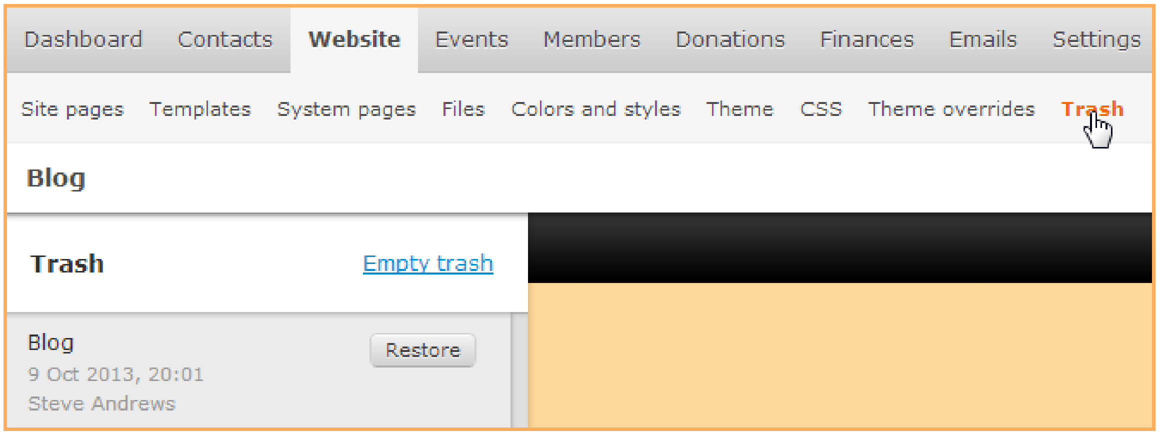
> Administrators with limited access cannot view page templates within the trash, and can only view pages to which they have been granted access.

Viewing trashed items

To view the contents of the trash, click **Trash** under the **Website** menu.

Read more/less

A list of deleted pages and templates appears on the left.



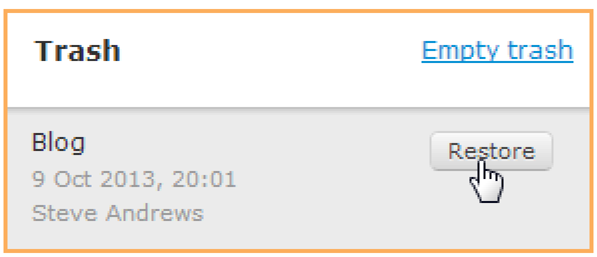
The trash can hold up to 100 items. Once the limit is reached, older items will be permanently deleted to accommodate newer ones.

Beneath of the name of the deleted page or template is the date and time it was deleted, and the name of the user who deleted it. When you click a page or template within the list, a preview of the deleted page or template appears in the preview area on the right.

Restoring trashed items

To restore a deleted page or template, click it within the list then click the **Restore** button.

Read more/less

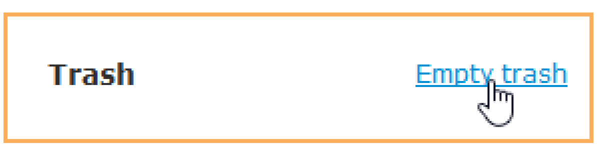


If you are restoring a page, it will be restored to the **Not in menu** page list, regardless of its previous **Position in menu** setting.

Emptying the trash

To empty the trash so that all its contents are permanently deleted, click the **Empty trash** link.

Read more/less



When administrators with limited access empty the trash, only the pages to which they have been granted access will be emptied.

Once the trash is emptied, its previous contents cannot be restored.

Restoring previous versions

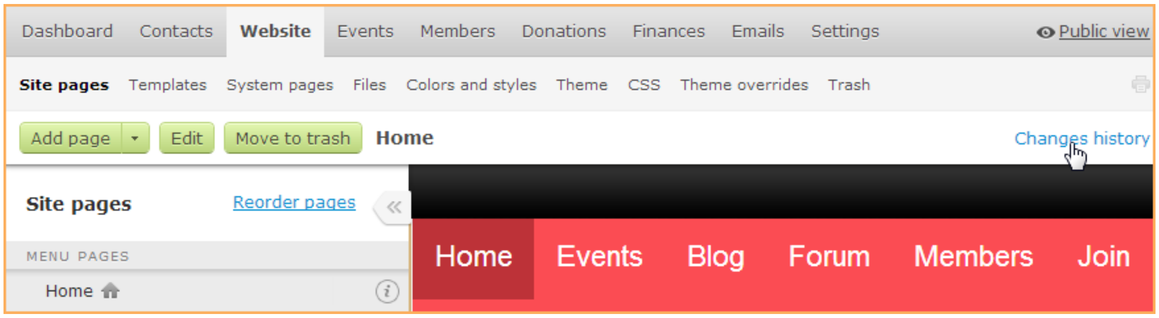
Each time you make changes to a site page, system page, or page template, a separate version is saved. You can view the previous versions of any page or template, and restore any version. Within the version history, you can see who made the changes and when.

If you change the page template for a page, or the master layout for a page template, a new version of the page or page template will be saved. Switching to a different website theme will **not** result in new versions of pages or page templates.

Viewing previous versions

To view the version history for a page or template, go to **Sites page** or **Page templates** (under the **Websites** menu), click the page or page template within the list, then click the **Changes history** link on the right side of the screen.

Read more/less



The history of changes to the selected page or template will now appear. For each version in the list, the time and date of the change is displayed, along with the name of the user who made the change.

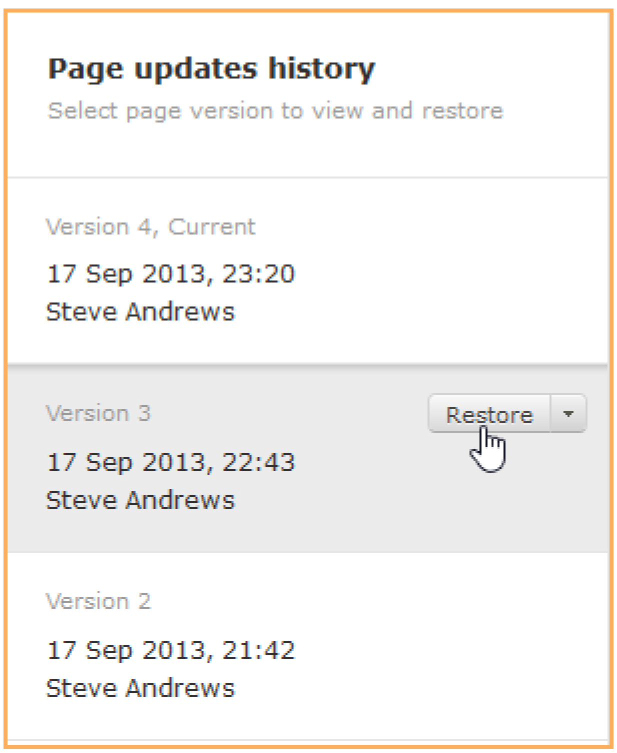
Version history can store up to 100 versions per page or template. Once the limit is reached, older versions will be removed to accommodate newer ones.

When you click a version within the list, that version of the page or template appears in the preview area on the right.

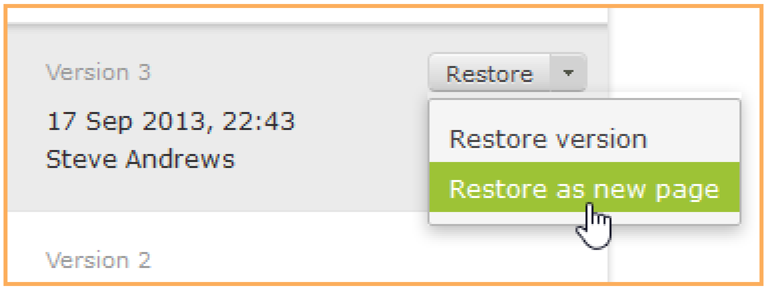
Restoring previous versions

To restore a previous version of the page or template, select the version within the list and click the **Restore** button.

Read more/less



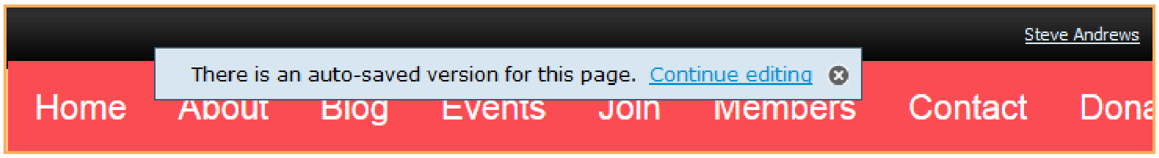
To restore a previous version as a new page – without affecting the current version of the page – click the down arrow within the **Res tore** button and select the **Restore as new page** option.



Crash recovery

While you are editing a page or template, a copy is automatically saved in the background every 10 seconds, so if your browser crashes during editing, the system will prompt you next time to resume where you left off.

Read more/less



Video: Managing site pages (7:01)

On this page:

Expand all sections

See also:

- Designing site pages

Page settings

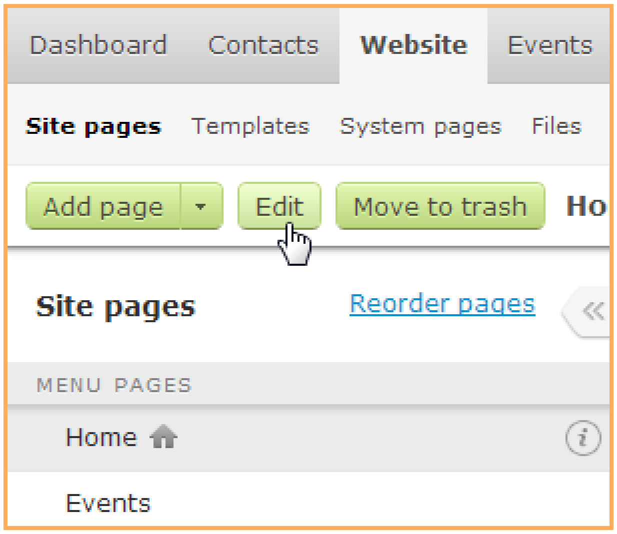
Page settings

Page settings controls various aspects of a page including visibility and access.

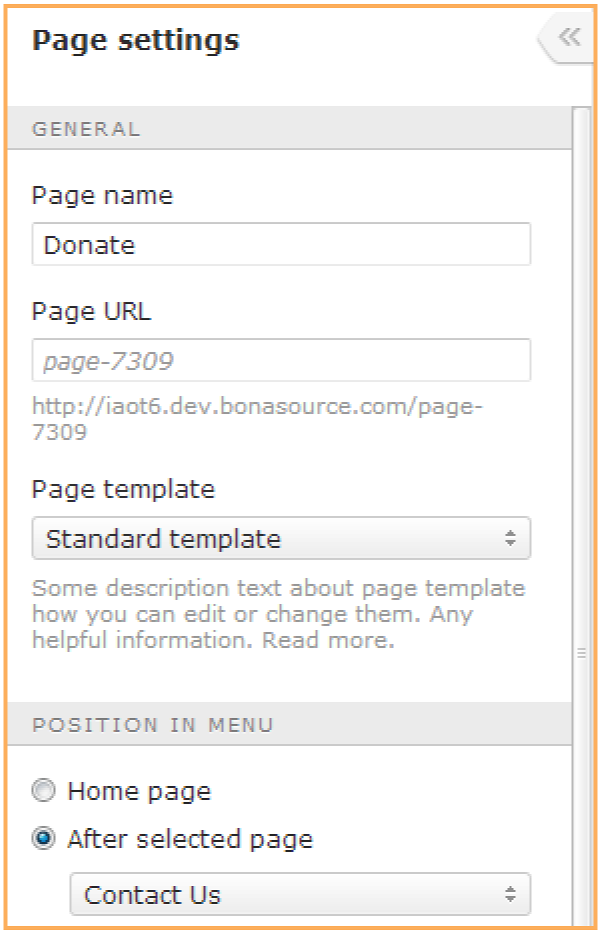
Viewing page settings

To view the page settings for a page, select the page within the **Site pages** list and click the **Edit** button.

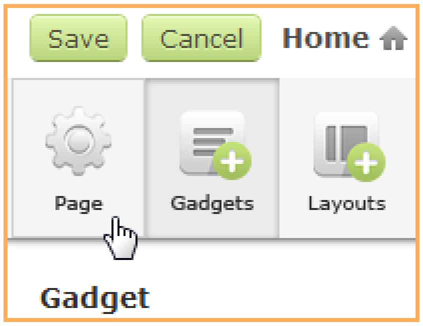
Read more/less



The page settings will appear in a panel along the left side.



If you are already editing the page and the page settings are not displayed along the left side – maybe you're currently displaying the list of available gadgets – click the **Page** icon towards the top of the screen.



Once you are finished modifying the page settings, click the **Save** button to save your changes.

Available page settings

The following page settings are available:
Read more/less

Setting	Description
Page name	The name of the page as it appears in the site menu and within the breadcrumbs that show your current location within the site hierarchy. 
Page URL	The name of the page within the page URL. The value you enter here will be combined with your Wild Apricot domain name to form the complete page URL. For example, if you enter *About* in this field, and your Wild Apricot domain name is https://stevelivetestsite.wildapricot.org, then the complete page URL will be https://stevelivetestsite.wildapricot.org/About. You cannot use the same page URL for multiple pages within your site. For more information, see Custom URLs.
Page template	The page template to be used as the basis for this page. The page will inherit the template's content and layout. Switching to a different page template after you have begun modifying the page may result in layouts and gadgets changing position within the page. Switching back to the previous page template may not restore them to their previous positions. You can, however, restore a version of the page that was saved prior to switching templates.
Position in menu	The location of this page within your Wild Apricot site menu. You can position the page after another page, group it under another page, or designate it as the home page. You can also choose to exclude or hide this page from the site menu altogether. For more information, see Page access and visibility.

Access level	Controls what type of visitor – members, administrators, the general public – can view the page, whether through the site menu or directly via a page URL. If you choose the **Restricted** option, check boxes will appear for each membership level and member group you have set up. To restrict access to particular membership levels or member groups, check each of the levels and groups you want to grant access to. If you restrict access by both membership levels and member groups, then members who belong to any of the selected levels **or** groups will be able to access the page. If you check the **All levels** or **All groups** option then all levels or groups – including any levels or groups added in the future – will be selected. If a visitor to your site does not have permission to access a page, it will not appear in the site menu for that person. Your site menu, therefore, may display different sets of pages depending on whether the visitor is logged in as a member or not, and what their membership level is. For more information, see Page access and visibility.
Meta-tags	You can assign meta-tags to be applied to the page. Meta-tags are HTML elements used to provide information about a page, redirect a page, and load scripts or styles. You can also assign global meta-tags that are applied to all pages. For more information, see Defining meta-tags.

On this page:

- Viewing page settings
- Available page settings

Expand all sections

Reordering and grouping menu pages

Reordering and grouping menu pages

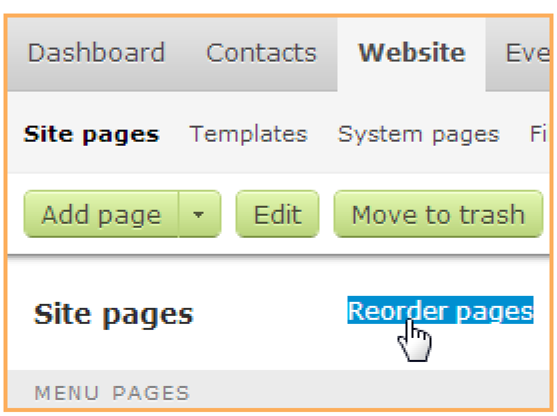
You can change the order of pages on your Wild Apricot site menu, and group Wild Apricot site pages under one another to form multi-level menus.

If you don't want a parent menu item to be clickable or link to a page, you can make a menu item not clickable.

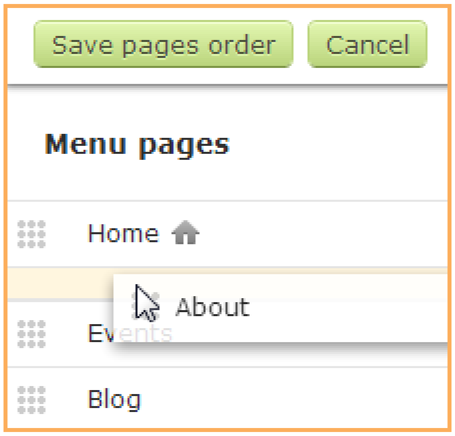
Reordering menu pages

To change the order of the pages in your site menu, click the **Reorder pages** link on the Site pages screen.

Read more/less



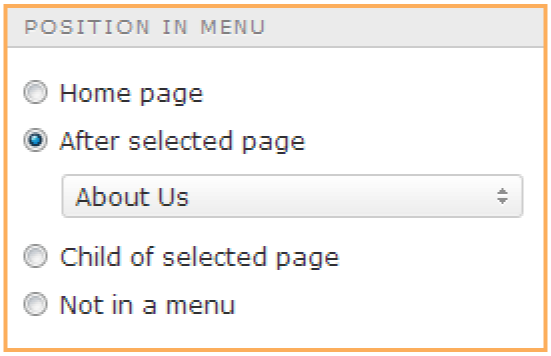
Now, drag and drop pages to the desired location within the menu.



To make a page the home page, drag it to the top of the menu.

Once you are finished reordering pages, click the **Save page order** button.

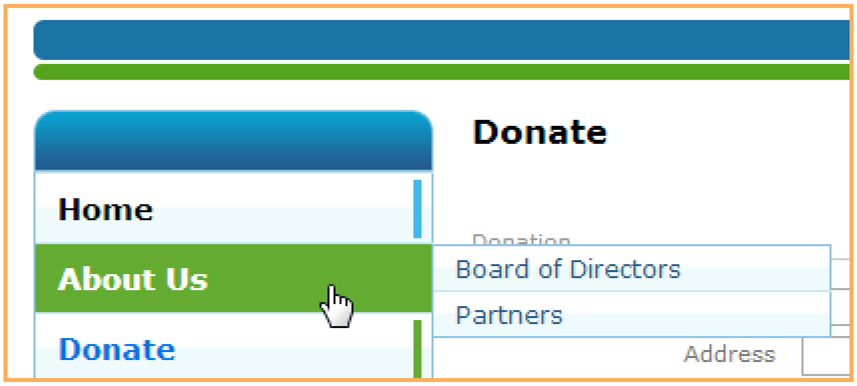
You can also control a page's position within your site menu – and designate it as your home page – through its page settings. Using the options under **Position in menu**, you can place the page after another page or remove it from the menu altogether.



Administrators with limited access can only reorder the pages to which they have been granted access.

Creating multi-level menus

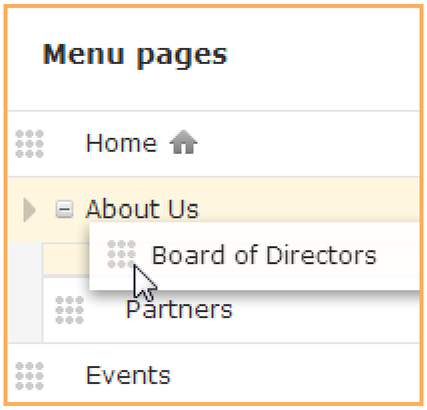
You can create multi-level menus so that options appear grouped under other options.
Read more/less



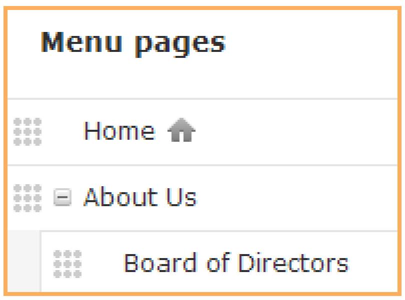
You can create as many levels of menu options as you wish, though older themes may not proper display more than 3 menu levels.

Within multi-level menus, a top-level menu option is still clickable and links to a separate page. In the above example, clicking **About Us** displays a different page than clicking **Board of Directors** or **Partners** does.

To create a multi-level menu, click the **Reorder pages** link on the **Site pages** screen. Next, drag the page you want to be a submenu option to the right of the page you want to act as the parent menu option.

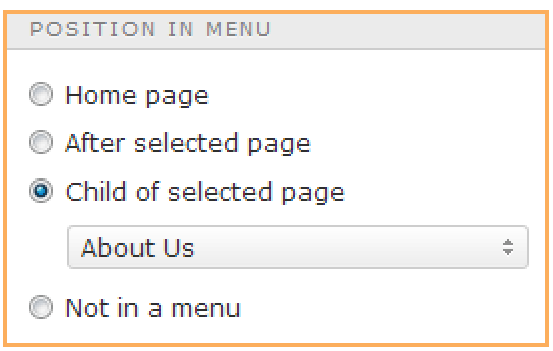


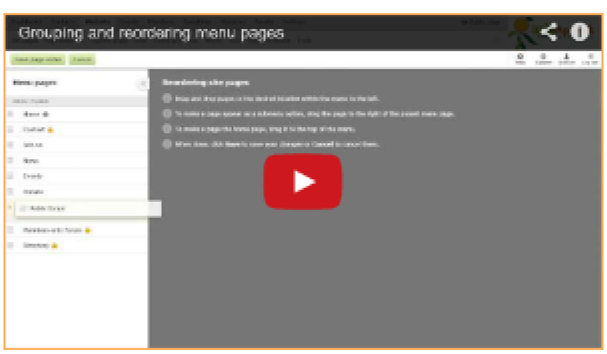
Once a triangle appears to the left of the parent page name, you can release your mouse button. After you drop the page, it will appear grouped under the parent menu option, both within the page list and in your site menu.



You can click the minus sign beside the parent page to collapse the list of subpages, and click the plus sign to expand it.

You can also group a page under another page through its page settings. Under **Position in menu**, click the **Child of selected page** opti on and select the page you want to group it under.





Video: Grouping and reordering pages (2:2
6)

On this page:

Expand all sections

Page access and visibility

Page access and visibility

For each page on your Wild Apricot site, you can control whether it appears in your site menu, and the type of users who can access it. You can restrict page access to certain membership levels or member groups, or to site administrators only. Page access and visibility is controlled through page settings.

Controlling whether a page appears in your site menu

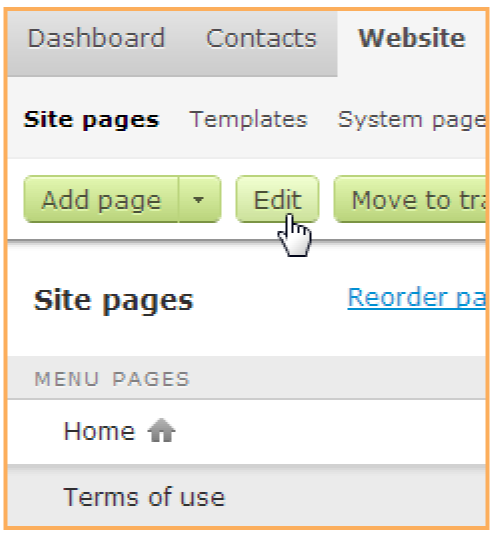
You can hide sites pages so they don't appear as options in your site menu, but are still accessible via a direct link.

Read more/less

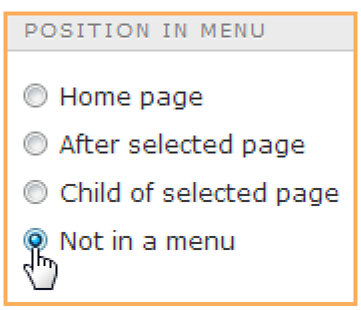
For example, you might want to have your terms of use and privacy policy pages appear as links on your page footer but not in your menu.

To control whether a page appears in your site menu, follow these steps:

1. Go to Site pages and select the page within the list.
2. Click the **Edit** button towards the top of the screen.



3. Using the **Position in menu** options that appear within the page settings on the left, choose where you want the page to appear within your site menu, or click the **Not in menu** option to exclude the page from the menu.



4. Click the **Save** button to save your changes.

Page settings automatically appear when you create a new page or begin editing an existing page.

For more information on managing your site menu, see Reordering and grouping menu pages.

Controlling page access

For each page on your site, you can control the type of users who can access it. You can restrict page access to certain membership levels or member groups, or to site administrators only.

Read more/less

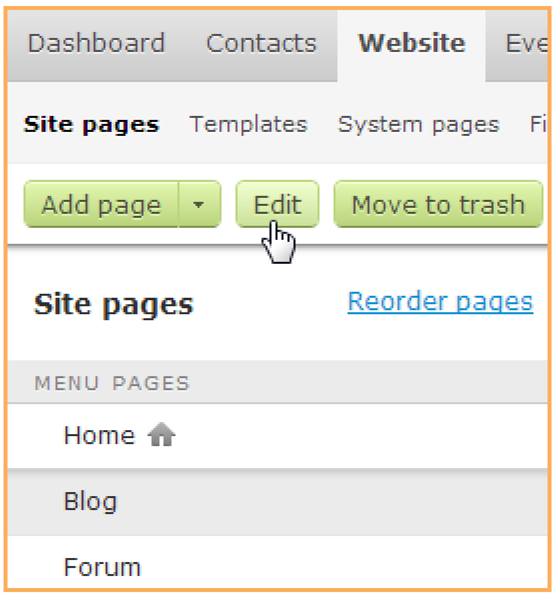
> Access restrictions apply to the page itself and not to any resources (graphics, links, etc.) appearing on the page. Resources appearing on a restricted page can theoretically be accessed by non-members using a URL.

Restricted pages will not appear as menu options for authorized members until they log in.

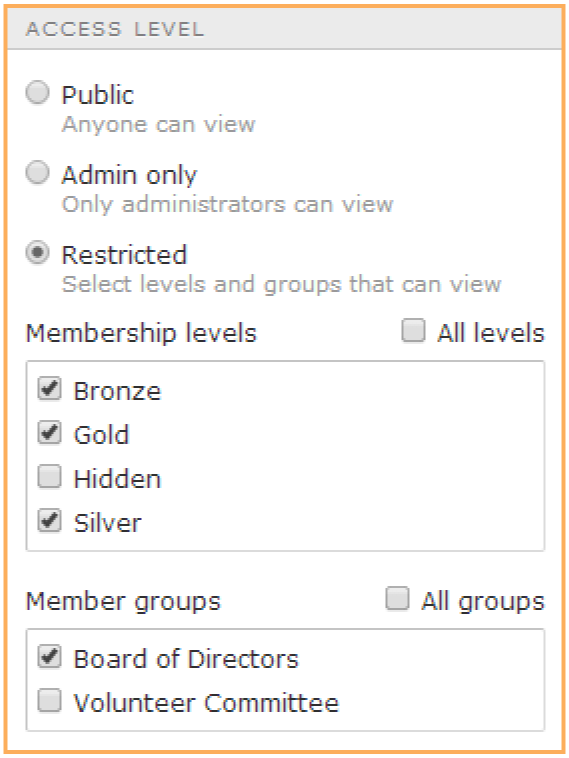
> It is not advisable to restrict your home page to members only. Instead, your home page should provide a log in button or log in form for members to log in and view member-only content on other site pages.

To restrict access to a particular page, follow these steps:

1. Go to Site pages and select the page within the list.
2. Click the **Edit** button towards the top of the screen.



3. Using the **Access level** options that appear within the page settings on the left, choose the type of users that can view the page.



4. Click the **Save** button to save your changes.

> ⚠ Page settings automatically appear when you create a new page or begin editing an existing one.

The following access levels options are available:

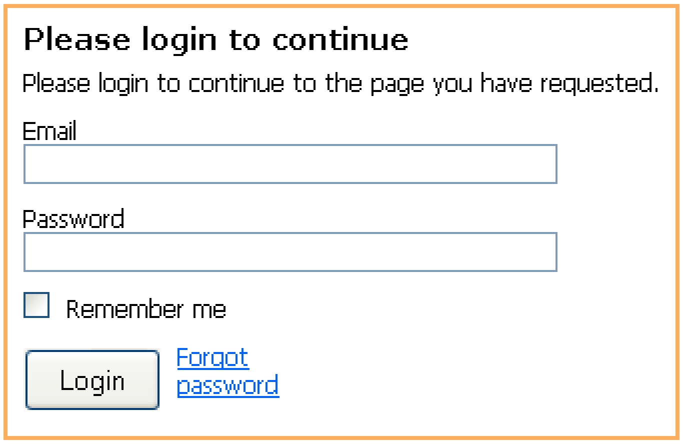
Option	Description
Public	Anyone can view the page, whether they are members or not, and logged in or not.
Admin only	The page can only be viewed by a site administrator. For all others, the page will not appear in the site menu. You might want to leave new pages as **Admin only** while you are setting the page up so you can preview it before it goes live.
Restricted	Only contacts who belong to one of the selected membership levels or member groups can view the page. When you click this option, check boxes appear for each membership level and member group you have set up. Check each of the levels and groups you want to grant access to. If you restrict access by both membership levels and member groups, then members who belong to any of the selected levels **or** groups will be able to access the page. If you check the **All levels** or **All groups** option then all levels or groups – including any levels or groups added in the future – will be selected.

Restricted pages will not appear as menu options for authorized members until they log in. To provide visible access to restricted pages, so that visitors and logged out members know they exist, you can create an unrestricted page with links to the restricted pages.

Customizing the authorization required page

When someone tries to connect to a restricted page and is not logged in, a page will appear instructing them to log in order to view the page.

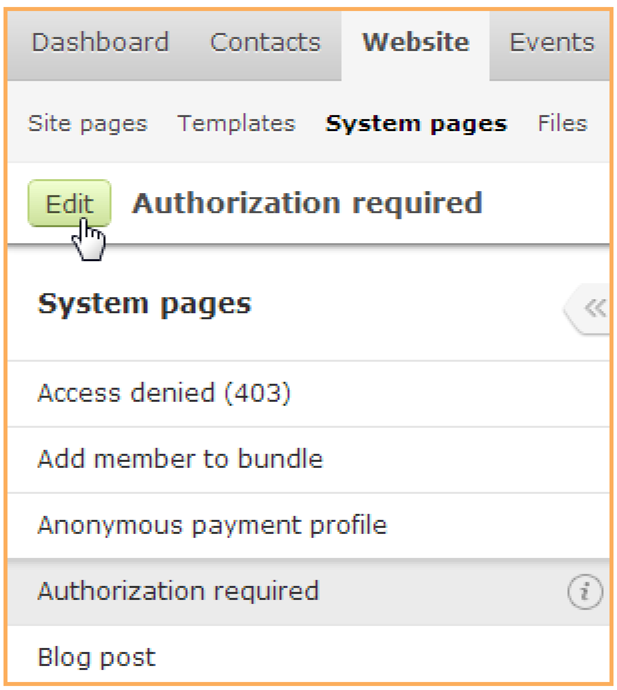
Read more/less



You can modify the title and instructions displayed on this page, and add any other content you wish. You cannot, however, modify or remove the login form.

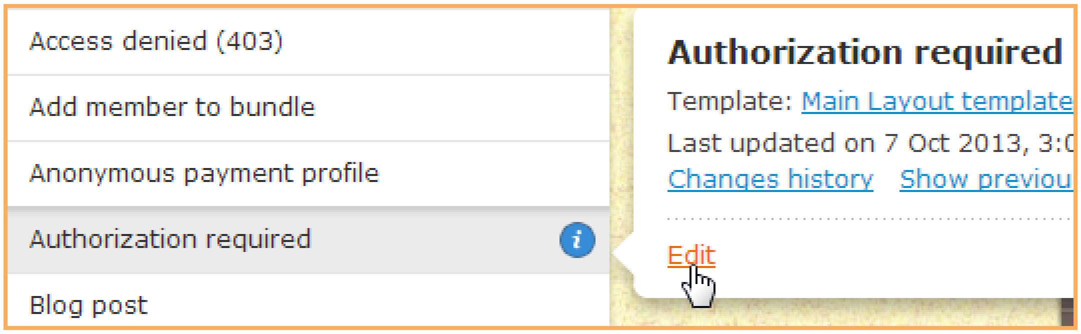
To customize the authorization required page, follow these steps:

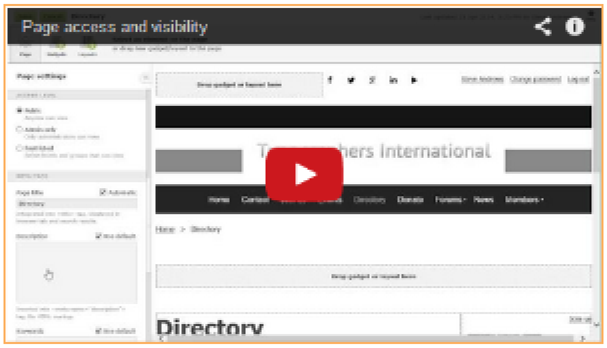
1. Click System pages under the **Website** menu.
2. Within the list of system pages, click the **Authorization required** entry.
3. Click the **Edit** button to enter edit mode.



4. Click the content gadget containing the heading and instructions, and modify them as required. For instructions, see Using the content editor. You can add other gadgets as well, but you cannot modify or delete the system gadget containing the log in fields.
5. Click the **Save** button to save your changes.

Alternatively, you could enter edit mode by hovering over the **Authorization required** entry then hovering over its info icon and clicking the **Edit** option.





Page access and visibility (3:35)

On this page:

- Controlling whether a page appears in your site menu
- Controlling page access
- Customizing the authorization required page

See also:

- Making menu items not clickable

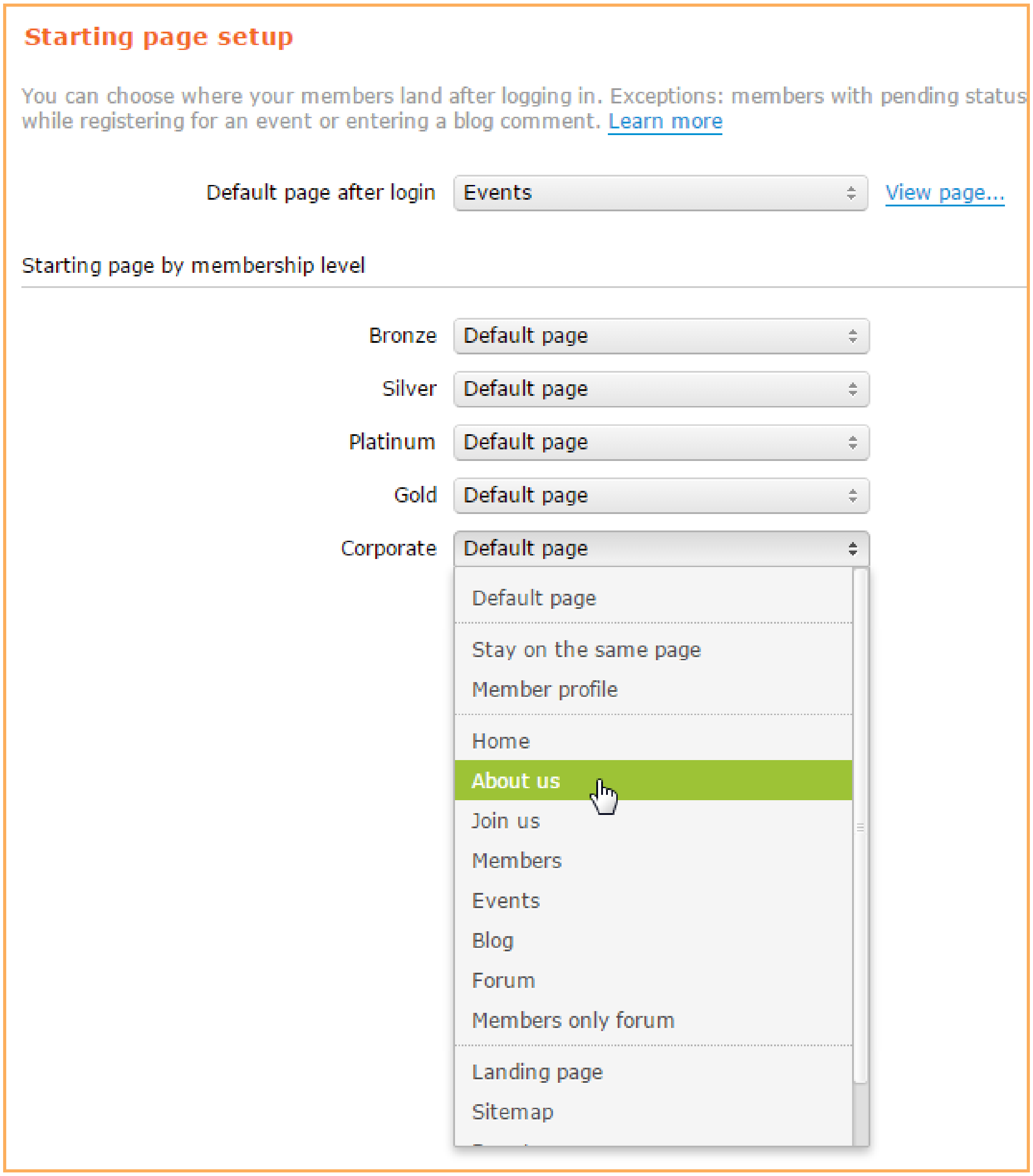
Starting page for members

Specifying the starting page for members

Where someone ends up after they log in – and accept the terms of use, if applicable – depends on whether they are an administrator, and whether they have any open invoices. Administrators will end up in Wild Apricot's admin view. Members with open invoices will be directed to the **I nvoices and payments** tab in their member profile. If their membership renewal date has passed, they will be directed to the **Profile** page where they can renew their membership.

For all other members, administrators can specify a starting page where members will land after logging in and accepting the terms of use. You can specify a default starting page, and override the default page by specifying starting pages for each membership level.

To specify a starting page for members, hover over the **Members** menu and select the **Starting page** option. The following screen will appear.



From here, you can choose one of the following options as the default page after login:

- All public and restricted website pages, including those not in your site menu
- The member's profile page
- The page they logged in from

For each membership level, you can select a different landing page, or use the default starting page.

> These settings do not apply when a member logs in...
>
> - while registering for an event
> - to enter a blog comment
> - to access a restricted page via a direct link.

Making menu items not clickable

Making menu items not clickable

Clicking on the top level within a multi-level menu will open the corresponding page. But maybe you don't want clicking the top level menu item to go anywhere. Instead, you just want the parent page to act as a way to group to the child pages under it. Here, we will provide a way for making any menu item do nothing when clicked (i.e. the link goes nowhere).

Making a single menu item not clickable

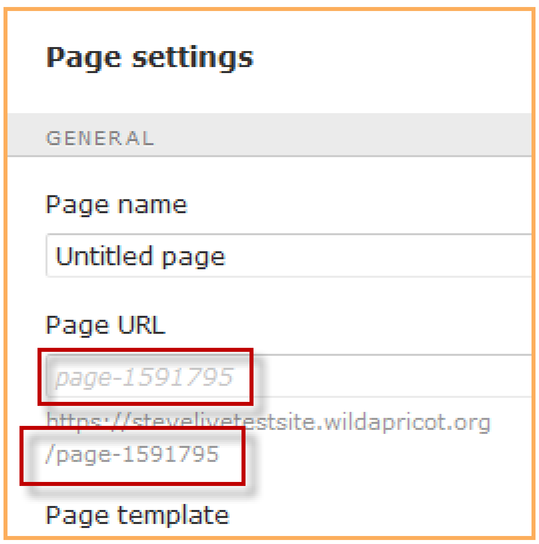
To make a single menu item not clickable, follow these steps:

Read more/less

1. Go to the Settings page and click **Global JavaScript** (under Site settings) then paste the following script in the code box (if there are other scripts already in there be sure not to overwrite any of it):

```
<script type="text/javascript">
    function removeLinks(links) {
        if (!arguments[0]) return;
        var a = arguments[0];
        jq$(".WaGadgetMenuHorizontal a, .WaGadgetMenuVertical
a").each(function() {
            var curhref=jq$(this).attr('href').split("/")[3];
            if (
                (typeof(a)=='string' && a==curhref)||
                (typeof(a)=='object' && (jq$.inArray(curhref, a)>-1))
            ) {
                jq$(this).attr("href", "javascript:void(0);").css("cursor",
"pointer");
            }
        });
    }
    removeLinks("pageURL");
</script>
```

2. In the code above, in the second line from the bottom, replace *pageURL* with the page URL – e.g. removeLinks("page-56457") – of the page. You can find the page URL within the page settings.



3. Click the **Save** button to save your changes.

Making multiple menu items not clickable

To make multiple menu items not clickable, follow these steps:

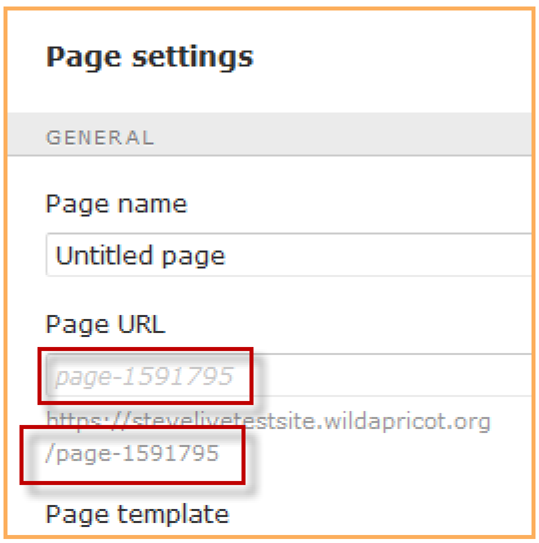
Read more/less

1. Go to the Settings page and click **Global JavaScript** (under Site settings) then paste the following script in the code box (if there

are other scripts already in there be sure not to overwrite any of it):

```
<script type="text/javascript">
    function removeLinks(links) {
        if (!arguments[0]) return;
        var a = arguments[0];
        jq$(".WaGadgetMenuHorizontal a, .WaGadgetMenuVertical
a").each(function() {
            var curhref=jq$(this).attr('href').split("/")[3];
            if (
                (typeof(a)=='string' && a==curhref)||
                (typeof(a)=='object' && (jq$.inArray(curhref, a)>-1))
            ) {
                jq$(this).attr("href", "javascript:void(0);").css("cursor",
"pointer");
            }
        });
    }
    removeLinks([pageURLarray]);
</script>
```

2. In the code above, in the second line from the bottom, replace *pageURLarray* with an array of page URLs within quotation marks and separated by commas – e.g. removeLinks(["Scholarship-and-Grants", "Fundraisers", "Join", "Events"]) – of the pages. You can find the page URL within the page settings.



3. Click the **Save** button to save your changes.

Troubleshooting

If the code you have inserted doesn't work, check to make sure that the quotation marks appearing in the code are straight quotation marks – " " – rather than curved or curly (aka smart) quotation marks – “ ”. Some word processors including Microsoft Word and Google Docs automatically convert straight quotation marks to curly ones.

On this page:

- Making a single menu item not clickable
- Making multiple menu items not clickable
- Troubleshooting

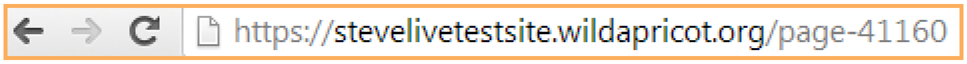
Expand all sections

Custom URLs

Custom URLs

When you create a web page in Wild Apricot, its URL – its Internet address – is created automatically in the form of http://yourdomain/page-41160 (where *yourdomain* is your Wild Apricot domain name, and *41160* is the page ID). You change the page address to something more memorable by specifying a custom URL.

For example, instead of...



...you could provide your blog page with a custom URL of *blog* so that its page address becomes:

Specifying a custom URL can improve your rankings in search engines, particularly if you use relevant keywords (e.g. *typography* for a typography blog). You can also use custom URLs if you are transitioning from a non-Apricot site and want to keep the same page URLs.

> Once you change the page URL from the numeric default to a custom ID, the original numeric page ID will continue to function, and will redirect to the custom ID you assign.

Specifying a custom URL

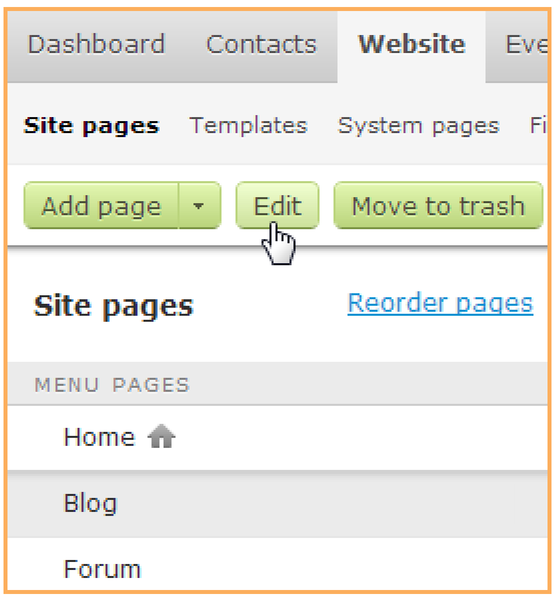
You can assign a custom URL to any Wild Apricot page including the homepage.

Read more/less

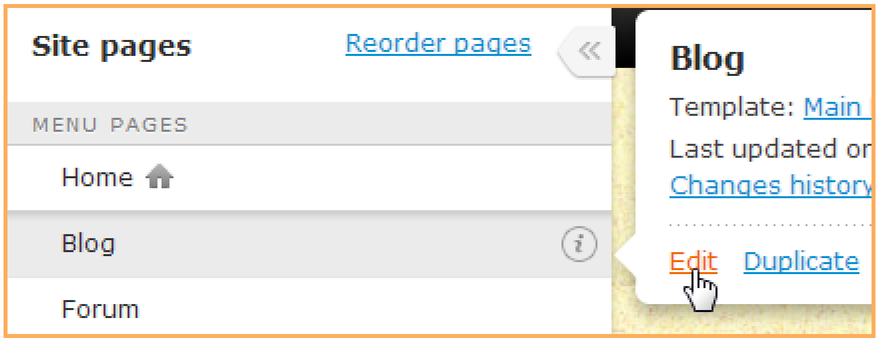
You cannot, however, assign a custom URL to individual events or blog posts.

To specify a custom URL for a page:

1. Go to Site pages and select the page within the list.
2. Click the **Edit** button towards the top of the screen...



...or hover over the page then hover over its info icon and click the **Edit** option.



3. In the **Page URL** field within the page settings on the left, enter the portion of the URL that follows the slash. If you want the URL to be http://yourdomain/blog, you would just enter *blog*.

4. Click the **Save** button to save your changes.

> The full URL of the page appears below the **Page URL** field.

Custom URL restrictions

Read more/less

Format

- The page URL must be unique within your site.

You can use:

- any extension (e.g. html, php, jsp, do) except for reserved extensions listed below
- sub-folders in the path (e.g. you can specify a custom URL of /Typography/blog)

You cannot use:

- double slashes in path (e.g. /Typography//blog)
- extensions reserved for resource files:

```
config, asmx, axd, jpeg, jpg, png, bmp, gif, swf, js, css
```

- reserved system URLs starting with:
  - /Admin/
  - /App_Themes/
  - /Captcha/

- /Common/
- /Content/
- /Default.aspx
- /DES/
- /DESGetFiles.aspx
- /DocumentHandler.ashx
- /EmailTracker/
- /Errors/
- event-
- /Info/
- /KeepSessionAlive.ashx
- /Logs/
- /Payments/
- /PromoBannerHandler.ashx
- /Resources/
- /RadControls/
- /SupportTicketsHandler.ashx
- /Sys/
- /ViewEvent.aspx
- /WebDav/
- /Widget/

Characters

You can use:

- Latin characters
- numbers
- any of the following special characters:

```
- _ = + ~ ! @ $ & * ( )
```

You cannot use:

- non-latin characters
- any special characters not listed above

On this page:

- Specifying a custom URL
- Custom URL restrictions

Expand all sections

Defining meta-tags

Defining meta-tags

Meta-tags are HTML elements used to provide information about a page, redirect a page, and load scripts or styles. Meta-tags includes the keywords used to describe your site to search engines. The keyword meta-tag is one of the factors (though not an important one) in optimizing your site's search engine rankings .

You can assign global meta-tags to be applied to all pages on your Wild Apricot site, and override the global meta-tags for individual pages.

Assigning global meta-tags

To assign global meta-tags – so that the meta-tags are applied to all pages – follow these steps:

Read more/less

1. Click the **Settings** tab.
2. Under **Site settings**, click **Meta-tags**.
3. On the screen that appears, you can enter the following information:

Section	Description	Example
Keywords	Site keywords to be inserted for every page in the <meta name="keywords"> tag. Use commas to separate multiple keywords (and keyword phrases).	typographers association,typography association,typeface designers,font designers,typography,typographers,fonts,typefaces,typographer
Description	Description to be inserted for every page in the <meta name="description"> tag.	International Association of Typographers - association for typographers, typeface designers, font designers, and other typography professionals
Raw Headers	HTML code to be inserted for every page in the <head> tag. You can insert code here to redirect a page, insert widgets for social media sites such as Facebook, and add a favorites icon – also known as a favicon, shortcut icon, or website icon – to the page tab and address bar for your site.	<link rel="shortcut icon" type="image/ico" href="/Resources/Pictures/favicon.ico" />

4. If you want to overwrite the existing keywords, descriptions, or raw headers for all pages on your Wild Apricot site, click **Reset all pages to use this**. If you don't click this button, any customizations you have made to meta-tags on individual pages will be retained, and the changes you make here will not be applied to those pages.
5. Click **Save** to save your changes.

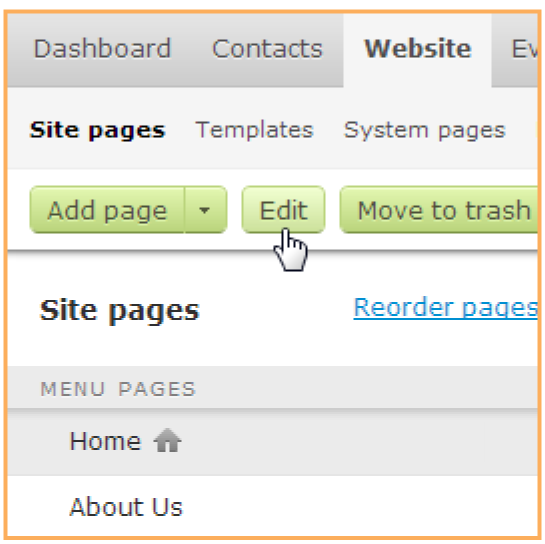
Assigning meta-tags to individual pages

You can override the global meta-tags and apply different meta-tags to individual pages on your site.

Read more/less

To assign custom meta-tags to individual pages, follow these steps:

1. Go to Site pages and select the page within the list.
2. Click the **Edit** button towards the top of the screen.



3. In the **Meta-tags** section within the page settings on the left, you can enter the following information:

Section	Description	Example

Page title	By default, the page title inserted in the <title> tag and displayed on the page tab in your browser is formed by combining your organization name and the page name, as defined in Page management. If you want to specify your own page title without changing the page's menu name, uncheck **Automatic** and enter a title.	Home of the IAT
Description	Description to be inserted in the <meta name="description"> tag. If you want to override the global description, uncheck **Use default** and enter a description for this page.	International Association of Typographers - association for typographers, typeface designers, font designers, and other typography professionals
Keywords	Site keywords to be inserted in the <meta name="keywords"> tag. If you want to override the global keywords, uncheck **Use default** and enter the keywords for this page. Use commas to separate multiple keywords (and keyword phrases).	typographers association,typography association,typeface designers,font designers,typography,typographers,fonts,typefaces,typographer
Raw Headers	HTML code to be inserted in the <head> tag. You can insert code here to redirect a page, insert widgets for social media sites such as Facebook, and add a favorites icon – also known as a favicon, shortcut icon, or website icon – to the page tab and address bar for your site. If you want to override the global raw headers, uncheck **Use default** and enter the raw headers for this page.	<link rel="shortcut icon" type="image/ico" href="/Resources/Pictures/favicon.ico" />

4. Click the **Save** button to save your changes.

On this page:

- Assigning global meta-tags
- Assigning meta-tags to individual pages

Expand all sections

Search engine optimization

Search engine optimization (SEO)

Search engine optimization (SEO) is the process of improving the position of your website in search engine rankings.

The Wild Apricot platform has been designed to be search engine friendly so that content of your site will easily be read and indexed by search engine crawlers, whatever account plan you use. Even so, there are a number of things you can do to optimize your site's rankings. These include:

- Make your site interesting and relevant to your target audience.
- Update your site regularly.
- Persuade other related sites to link to it.
- Use a custom domain name rather than a wildapricot.org subdomain.
- Assign custom URLs to your pages using relevant keywords (e.g. Typography for a typography forum).
- Use meta-tags to define site keywords that match search strings your target audience is likely to use. Keywords should be broad enough to attract a wide range of visitors but not so general that your site gets lost in the crowd. For example, if you set up a site for the

International Association of Typographers, you might use targeted keywords like "typographers association", "typeface designers", and "font designers" (along with obvious ones like "typography" and "typographers") but avoid generic ones like "association" and "international".
- Set custom page titles that incorporate your keywords without overloading them (a practice known as *keyword stuffing* that gets penalized by search engines). For the International Association of Typographers, you might want to title the home page "IAT - association for typographers, typeface designers, font designers, and other typography professionals".

Redirecting a page

Redirecting a page

You may want to redirect a page on your Wild Apricot site so that clicking its menu option links to a page on another site. Your organization might have several local websites and consequently you want to include a menu option on each that links to a central website.

> You cannot display the new page in a separate tab or window since popup blockers will prevent this.

To redirect a page on your Wild Apricot site, follow these steps:

1. Create a new empty page. You may need to create a blank template first, since pages inherit content from a template.
2. Within the page settings for the new page, enter a **Page name** – the name that will appear in your site menu.
3. Find the **Meta-tags** section and uncheck the **Use default** checkbox beside **Raw headers** .
4. In the **Raw headers** code box, enter the following code:

```
<script type="text/javascript">
  try {
    if (!top.adminpanel) {
      window.location = "redirect URL";
    }
  }
  catch(e) {}
</script>
<noscript>
  <meta http-equiv="Refresh" content="0"; URL="redirect URL">
</noscript>
```

   where *redirect URL* is the URL of the page you want to redirect to (e.g. http://yoursite.com). If you are redirecting to an external page, the URL must begin with either http:// or https://. If you are redirecting to a page on your Wild Apricot site, the URL should be */pageURL* w here *pageURL* is the page URL of your Wild Apricot page. Note that there are two places in the code where you need to enter the URL.

   > Make sure you do not make a cyclical redirect to the same page.

5. Click the **Save button** to save your changes.

Clicking the menu option for this page should now redirect it to the URL you entered.

> The redirect will not work when you are logged in as an administrator. To test it, you need to log out and try it as a public visitor or a member.

Restoring pages and page templates

Restoring pages and page templates

You can view and restore deleted site pages and pages templates, and previous versions of site pages, system pages, and page templates.

Restoring deleted pages and page templates

When you delete a page or page template, it is moved to the trash. From the trash, you can preview the deleted page or template, and restore it or empty the trash.
You can also restore previous versions of pages that have not been deleted. For more information, see Version history.

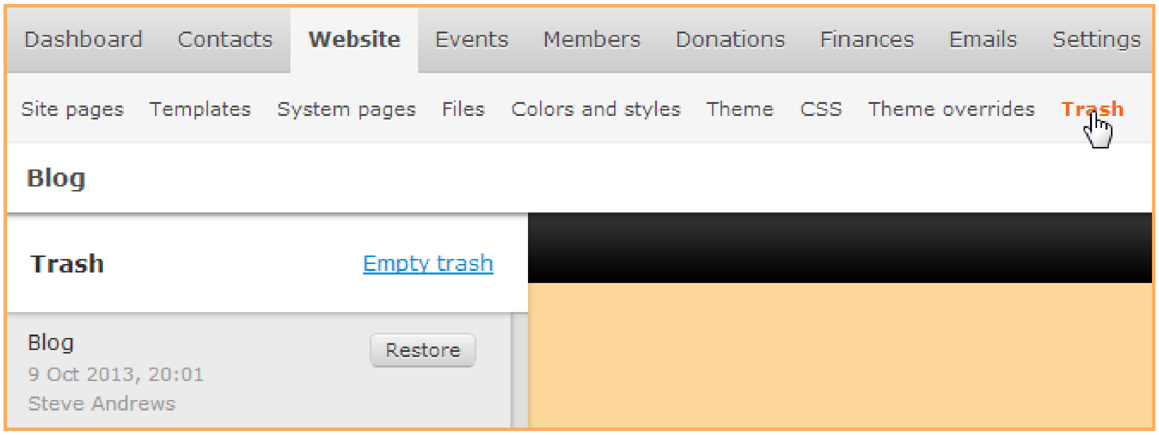
⚠ Administrators with limited access cannot view page templates within the trash, and can only view pages to which they have been granted access.

Viewing trashed items

To view the contents of the trash, click **Trash** under the **Website** menu.

Read more/less

A list of deleted pages and templates appears on the left.



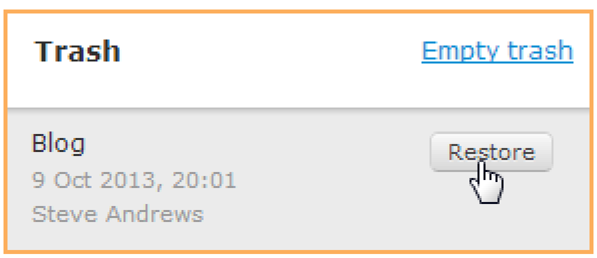
⚠ The trash can hold up to 100 items. Once the limit is reached, older items will be permanently deleted to accommodate newer ones.

Beneath of the name of the deleted page or template is the date and time it was deleted, and the name of the user who deleted it. When you click a page or template within the list, a preview of the deleted page or template appears in the preview area on the right.

Restoring trashed items

To restore a deleted page or template, click it within the list then click the **Restore** button.

Read more/less



If you are restoring a page, it will be restored to the **Not in menu** page list, regardless of its previous **Position in menu** setting.

Emptying the trash

To empty the trash so that all its contents are permanently deleted, click the **Empty trash** link.

Read more/less

When administrators with limited access empty the trash, only the pages to which they have been granted access will be emptied.

⚠ Once the trash is emptied, its previous contents cannot be restored.

Restoring previous versions

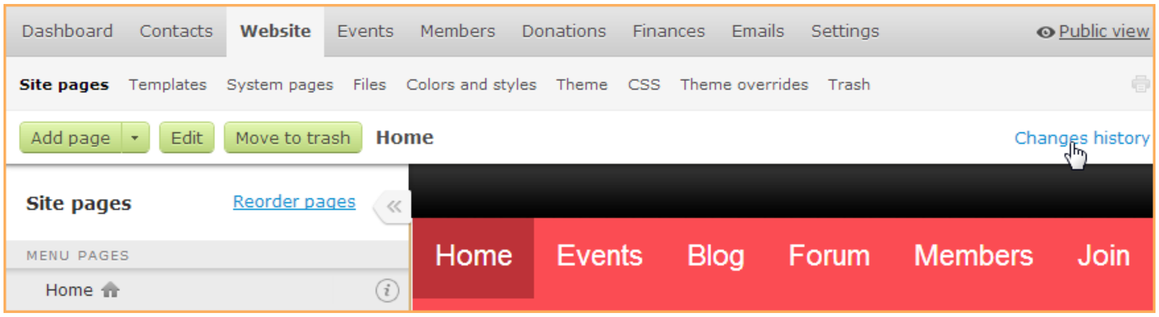
Each time you make changes to a site page, system page, or page template, a separate version is saved. You can view the previous versions of any page or template, and restore any version. Within the version history, you can see who made the changes and when.

> If you change the page template for a page, or the master layout for a page template, a new version of the page or page template will be saved. Switching to a different website theme will **not** result in new versions of pages or page templates.

Viewing previous versions

To view the version history for a page or template, go to **Sites page** or **Page templates** (under the **Websites** menu), click the page or page template within the list, then click the **Changes history** link on the right side of the screen.

Read more/less



The history of changes to the selected page or template will now appear. For each version in the list, the time and date of the change is displayed, along with the name of the user who made the change.

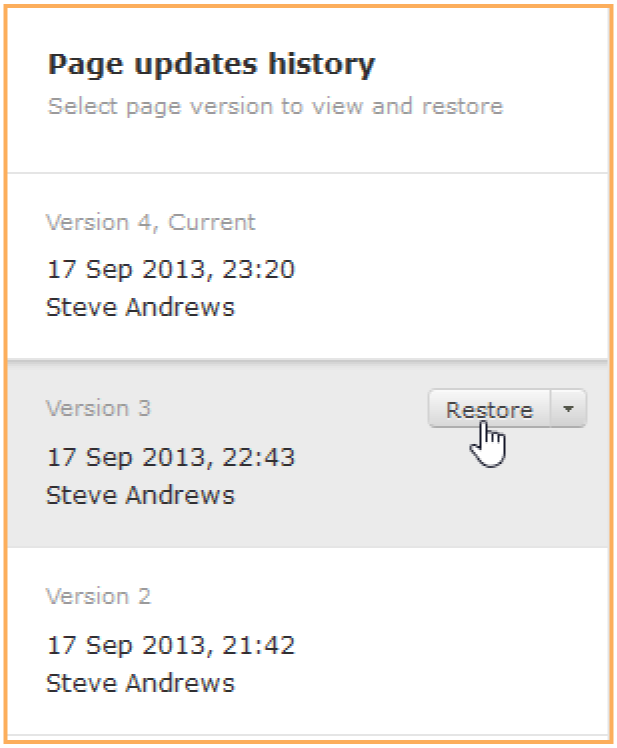
> Version history can store up to 100 versions per page or template. Once the limit is reached, older versions will be removed to accommodate newer ones.

When you click a version within the list, that version of the page or template appears in the preview area on the right.

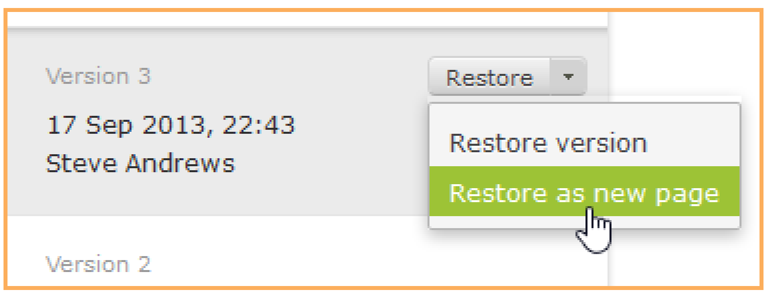
Restoring previous versions

To restore a previous version of the page or template, select the version within the list and click the **Restore** button.

Read more/less



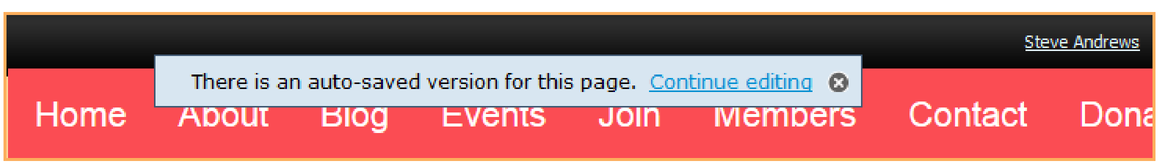
To restore a previous version as a new page – without affecting the current version of the page – click the down arrow within the **Restore** button and select the **Restore as new page** option.



Crash recovery

While you are editing a page or template, a copy is automatically saved in the background every 10 seconds, so if your browser crashes during editing, the system will prompt you next time to resume where you left off.

Read more/less



On this page:

- Restoring deleted pages and page templates
- Restoring previous versions

Expand all sections

Trash

Trash

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restore it or empty the trash.
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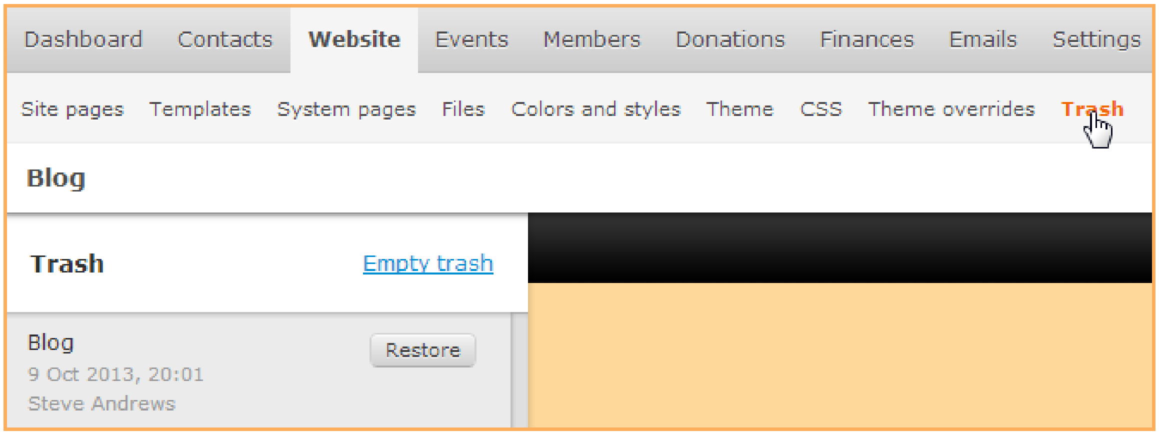

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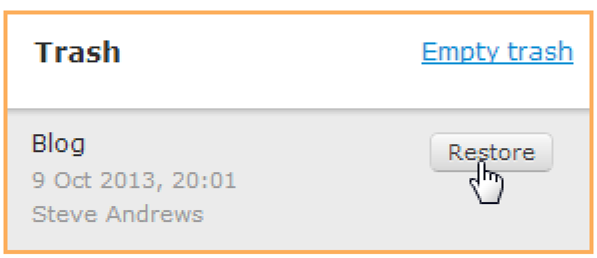
Read more/less



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Emptying the trash

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Read more/less

When administrators with limited access empty the trash, only the pages to which they have been granted access will be emptied.

Once the trash is emptied, its previous contents cannot be restored.

On this page:

- Viewing trashed items
- Restoring trashed items
- Emptying the trash

Expand all sections

Version history

Version history

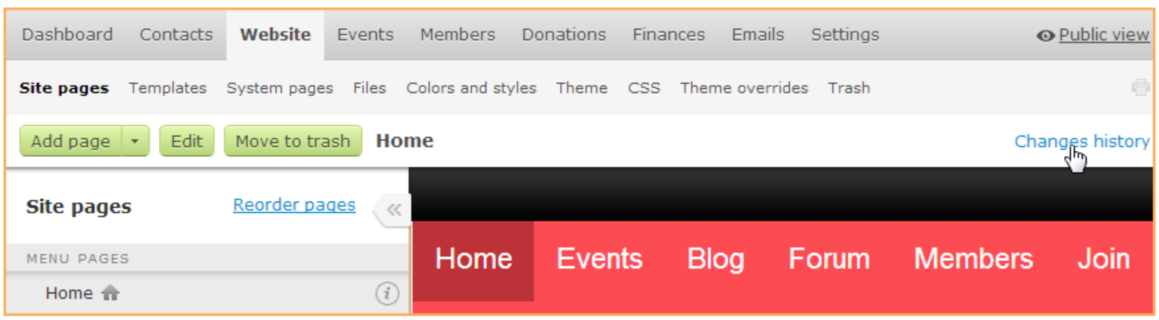
Each time you make changes to a site page, system page, or page template, a separate version is saved. You can view the previous versions of any page or template, and restore any version. Within the version history, you can see who made the changes and when.

If you change the page template for a page, or the master layout for a page template, a new version of the page or page template will be saved. Switching to a different website theme will **not** result in new versions of pages or page templates.

Viewing previous versions

To view the version history for a page or template, go to **Sites page** or **Page templates** (under the **Websites** menu), click the page or page template within the list, then click the **Changes history** link on the right side of the screen.

Read more/less



The history of changes to the selected page or template will now appear. For each version in the list, the time and date of the change is displayed, along with the name of the user who made the change.

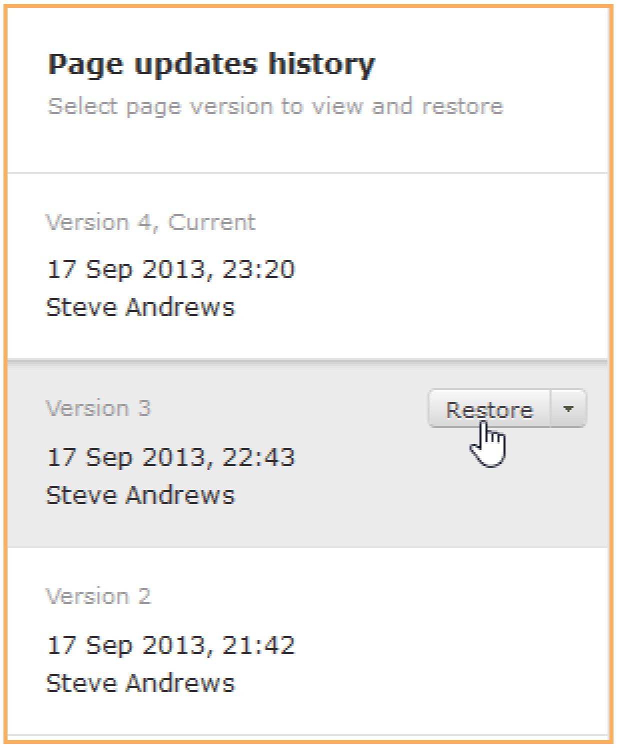
Version history can store up to 100 versions per page or template. Once the limit is reached, older versions will be removed to accommodate newer ones.

When you click a version within the list, that version of the page or template appears in the preview area on the right.

Restoring previous versions

To restore a previous version of the page or template, select the version within the list and click the **Restore** button.

Read more/less



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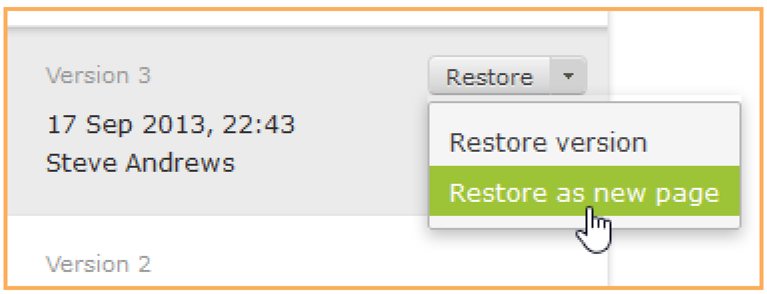
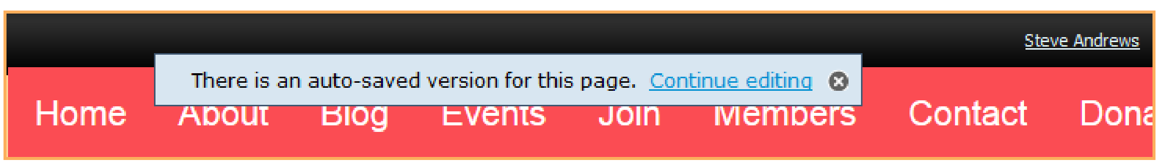


Crash recovery

While you are editing a page or template, a copy is automatically saved in the background every 10 seconds, so if your browser crashes during editing, the system will prompt you next time to resume where you left off.

Read more/less



On this page:

- Viewing previous versions
- Restoring previous versions
- Crash recovery

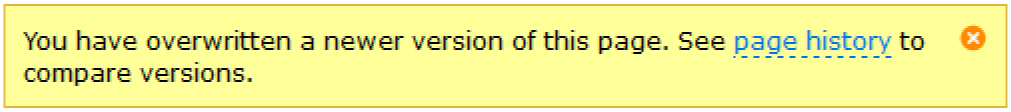
Expand all sections

Concurrent or simultaneous editing

Concurrent or simultaneous editing

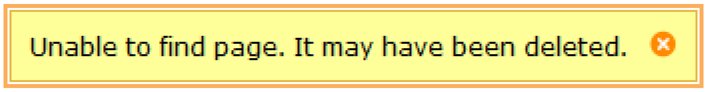
Multiple administrators can have the same site page open for editing at the same time.

When you save changes to a page, the saved version will overwrite any other changes saved by any other administrator, whether before or during your editing session. If another version is overwritten – other than the version you opened for editing – then a message will be displayed informing you that you have overwritten a newer version of the page.



Versions saved by other administrators are stored in the changes history for the page, and can be viewed or restored.

If another administrator deletes the page during your current editing session, a message will appear stating that the page was not found when you try to save your changes.



The deleted page is stored in the trash, and can be viewed or restored.

Designing site pages

Designing site pages

You can design your site pages to display dynamic content from your Wild Apricot database, or custom content that you add directly using the content editor. You can add custom HTML to embed external content or third-party widgets. You can set up your pages so that all pages share certain content and a similar appearance, or you can make each page completely different. Content and layout can be automatically inherited by all pages, or just the pages you choose.

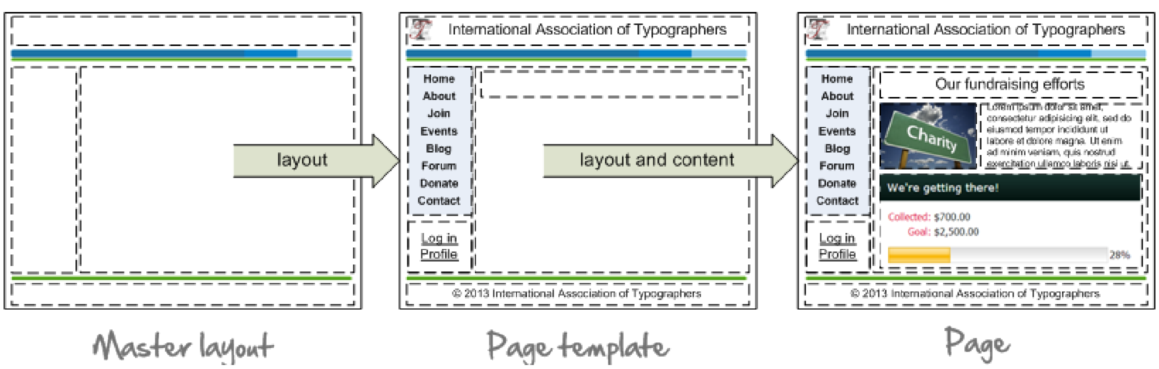
For instructions on adding pages and modifying page settings, see Managing site pages.

How pages are assembled

The foundation of each site page is the page template on which it is based. A page derives its layout from the template, and inherits any content that appears on the template.

Read more/less

You can, for example, set up your page header and footer in a template so that it is automatically included on every page that uses the template. Each template, in turn, is based on a particular *master layout* which provides shared graphical elements and defines the areas – called *placeholders* – where content can be added.



You can set up multiple templates, each with its own layout and shared content. Each page can be based on a different template, and multiple pages can share the same template.

Within both the page and page template, you can divide the page into sections and subsections using layouts. Layouts divide content areas into cells where you can drag and drop gadgets. All content added to a page or page template is inserted as a gadget.

The physical appearance of each page is also affected by the currently selected website theme which determines the overall look of your site. Among other things, the theme you choose controls your site's default site background and color theme, the available text styles, and the orientation of your site menu.

For experienced website designers and developers, Wild Apricot provides additional tools for advanced customization and fine-tuning of your Wild Apricot site pages.

Entering edit mode

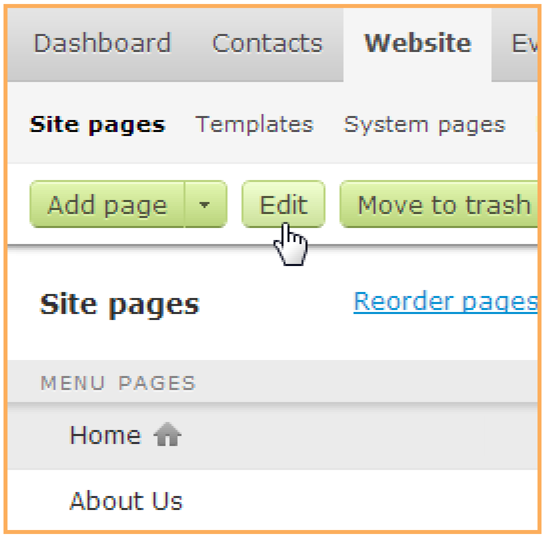
To begin modifying a page, follow these steps:

Read more/less

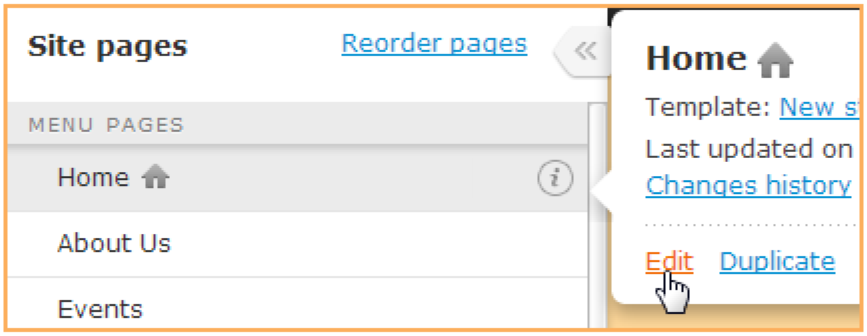
1. Click **Site pages** under the **Website** menu.
2. Click the page you want to modify within the page list.

   > If the page you want to select is grouped under another page, you may have to click the plus sign beside the parent page to display its subpages.

3. Click the **Edit** button.



Alternatively, you could hover over the page you want to modify then hover over its info icon and click the **Edit** option.



Once in edit mode, you can add, remove, and modify the gadgets appearing on the page. All content, whether dynamic content drawn from your Wild Apricot database or custom content you add yourself, is added as gadgets. Gadgets can be placed into, above, or below layouts. For content gadgets, you can directly modify the content using the content editor. For all gadgets, you can control aspects of its appearance and behavior by adjusting the gadget settings and other related settings.

A functional preview of the page you are modifying appears in the preview area on the right.

When you are finished modifying the page and its contents, click **Save** to save your changes. Your changes will be reflected in the preview version of the page.

For instructions on adding and deleting pages, see Managing site pages. For instructions on modifying page templates, see Page templates.

Controlling page layout

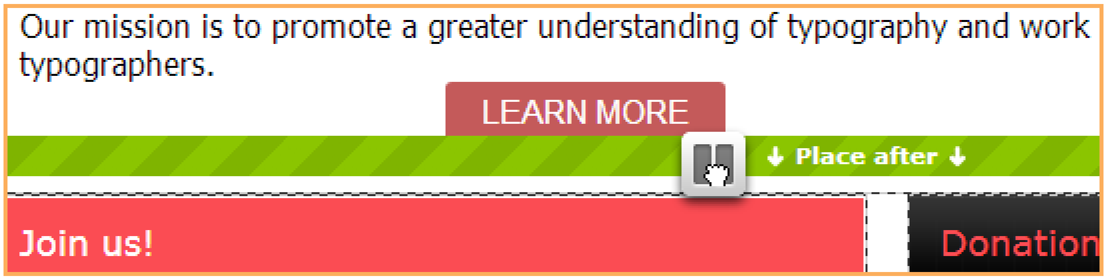
Though the overall layout of a page is inherited from its page template – along with any content appearing on the template – you can further refine the page layout by adding *layouts*.

Read more/less

Using layouts, you can divide the sections of a page or page template into multiple rows and columns. Cells within each layout act as containers where content in the form of gadgets can be added.

While editing a page or page template, you can add a layout by clicking the **Layouts** icon to display the list of available layouts. Within the list, you drag the layout you want to insert from the list, and drop it on the desired location.

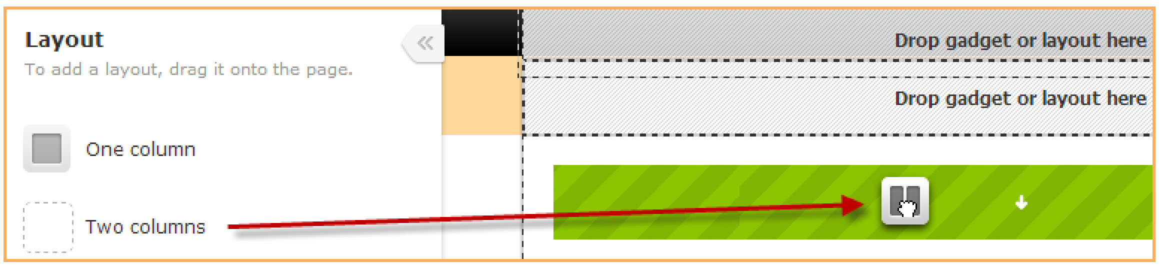
Within a page, you can insert layouts before or after layouts inherited from the page template...



...or directly into a placeholder if no layouts were added to the placeholder in the page template.

When you begin dragging a layout, possible destinations for the layout appear in blue. When you drag a layout above or below an existing layout, a prompt will appear indicating where you can drop the layout, either after or before the existing layout.

Within a page template, you can insert one or more layouts into a placeholder, but not before or after one. When a placeholder is empty, a **Drop gadget or layout here** prompt will be displayed. When you drag a layout over an empty placeholder, the placeholder turns green, indicating that you can drop the gadget into the placeholder.



You cannot subdivide a layout by adding another layout to it.

For more information, see Layouts.

Adding page content using gadgets

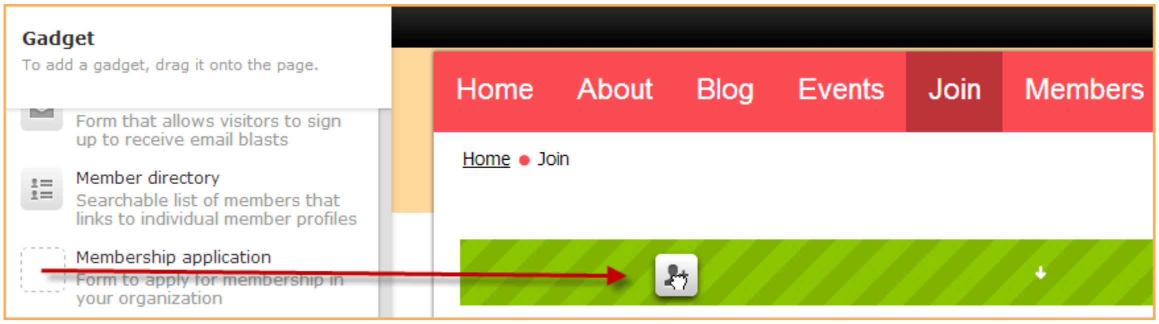
Designing site pages – or page templates – involves adding and modifying gadgets. Gadgets can be used to display both custom content and dynamic content.

Read more/less

Dynamic content displays information from your Wild Apricot's database (or an external database), or a form you can use to update information in your Wild Apricot database. Custom content is content you add using the content editor. Custom content includes text, pictures, tables, links, and custom HTML, and can be added to a content gadget or directly to an email, email template, or event description.

Each page can combine multiple layouts and gadgets, though certain gadgets – known as singular gadgets – cannot be added to a page containing another singular gadget, or to a page template or system page.

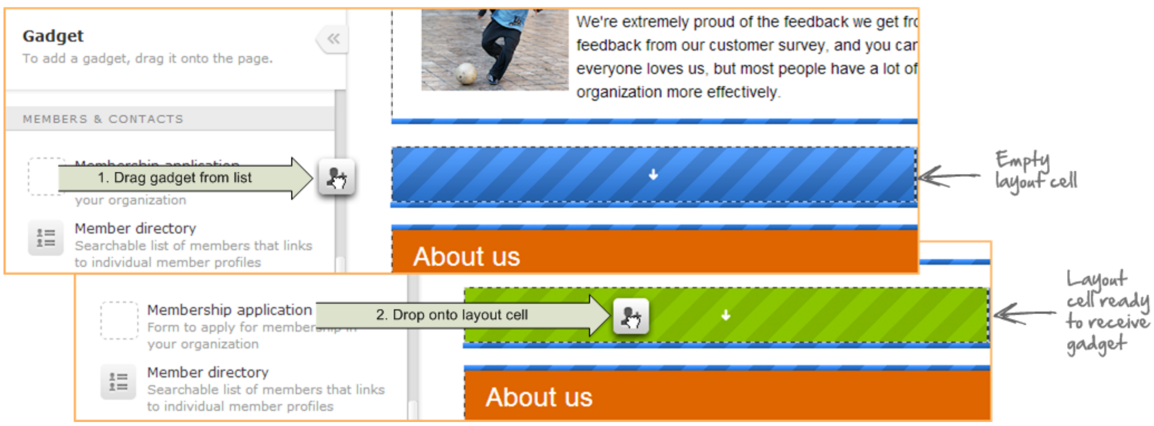
Once you have opened a page for editing, you can add a gadget by clicking the **Gadgets** icon to display the list of available gadgets. Within the list, you drag the gadget you want to insert from the list, and drop it on the desired location.



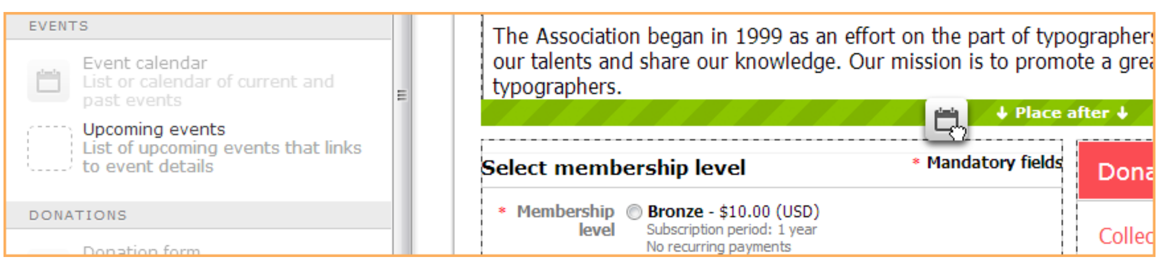
Gadgets can be inserted a number of locations, including:

- into a cell within a layout, either within the page or within the page template used by the page
- above or below a layout
- above or below another gadget
- into a placeholder within the page or page template

When a layout section or placeholder is empty, a **Drop gadget or layout here** prompt will be displayed. When you begin dragging a gadget, possible destinations for the gadget appear blue. When you drag a gadget over an empty layout section or placeholder, it turns green, indicating that you can drop the gadget there.



When you drag a gadget above or below a layout or another gadget, a prompt will appear indicating that you can drop the gadget before or after the layout.



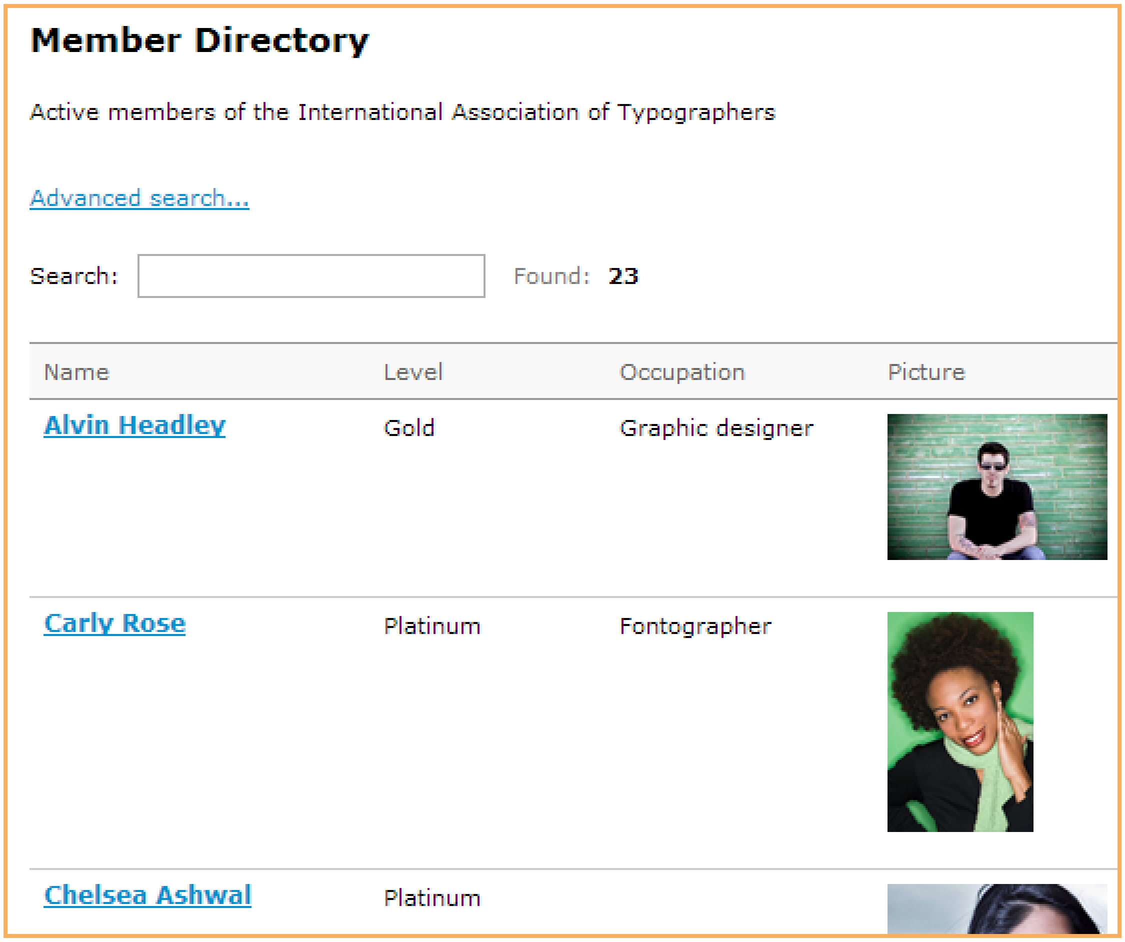
For more information, see Gadgets.

Controlling the content of individual gadgets

For gadgets displaying dynamic content – such as a blog or event calendar – the content is automatically retrieved and displayed.

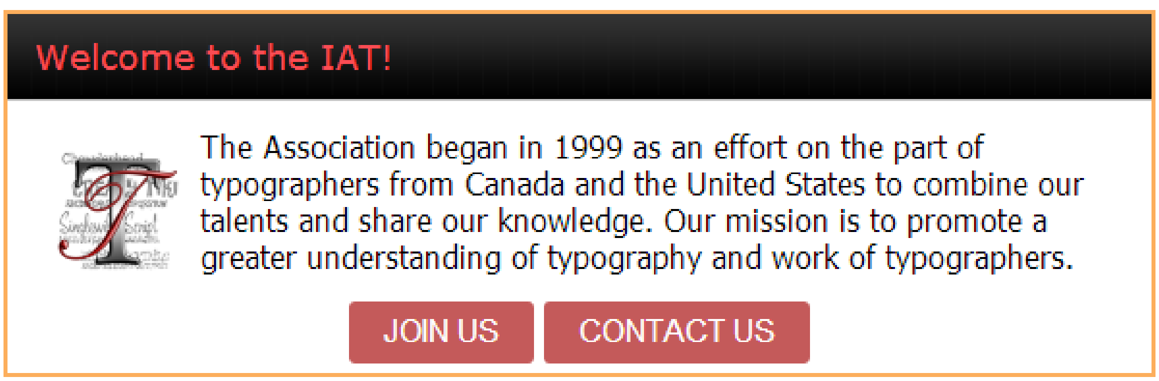
Read more/less

For example, the information displayed by a member directory gadget is extracted from your Wild Apricot database and displayed subject to any restrictions you have set.

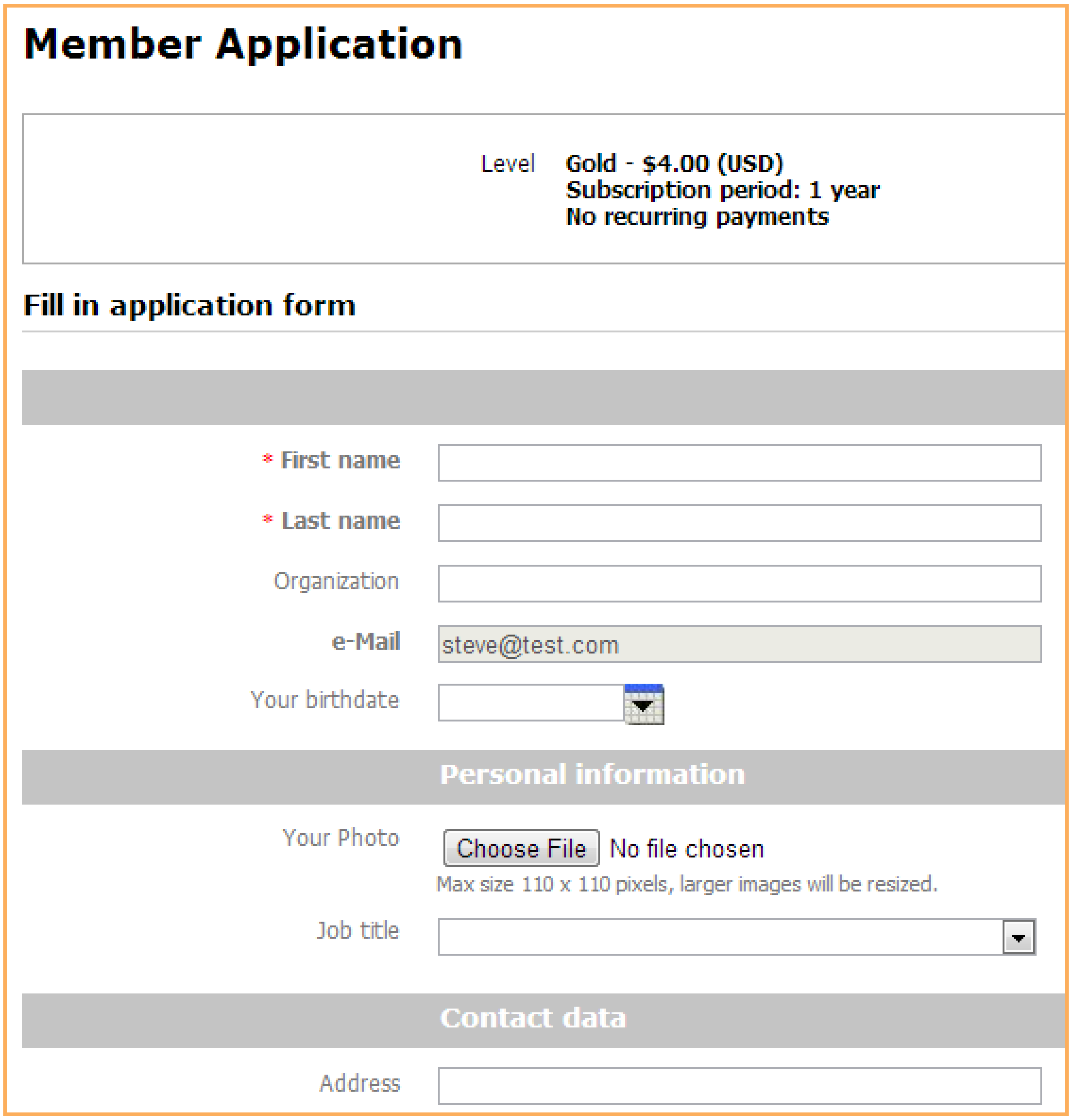


The appearance and behavior of the gadget can be controlled using the gadget's settings – or other related settings – but the actual content of the gadget is automatically rendered.

For content gadgets – displaying static rather than dynamic content – you add content to the gadget using the content editor. Once you have opened the content gadget for editing, you can add or modify text, picture, tables, links, and other content.



In some cases, the content of a dynamic gadget can be affected by settings other than the gadget settings. For example, whether events appear on an event calendar gadget depend on the event detail settings for each event. Where a dynamic gadget displays a form – such as a membership application gadget – the fields that appear on the form will be drawn from the fields in your Wild Apricot database. You can customize the content of these forms by adding, removing, and modifying the fields in your Wild Apricot database.



Dynamic gadgets can also be affected by the settings of other related gadgets. For example, the forum categories that are used to group multiple forums within a forum summary gadget are set within the forum gadget's settings.

For some gadgets, the visibility of the data being displayed can be restricted to certain types of members. For all gadgets, access to the page on which the gadget appears can be controlled using the page settings.

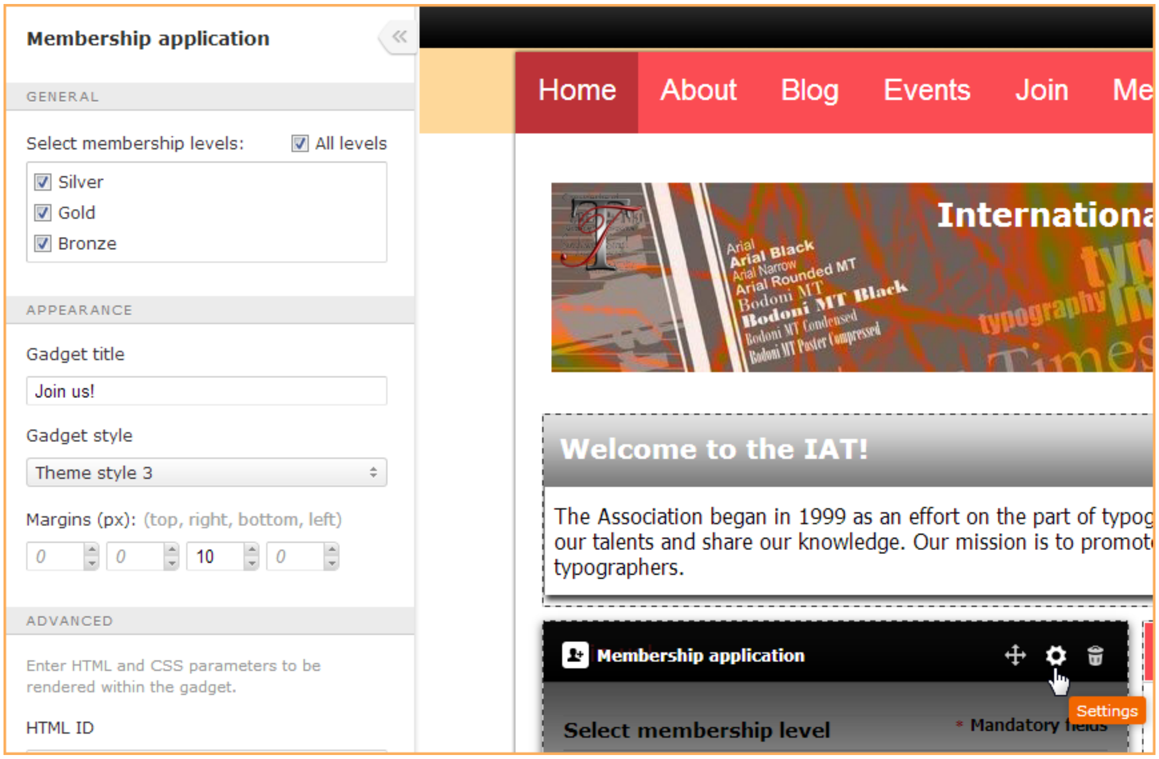
Adjusting settings

Each page, placeholder, layout, and gadget has settings that you can adjust. Using these settings, you can control that element's behavior or appearance.

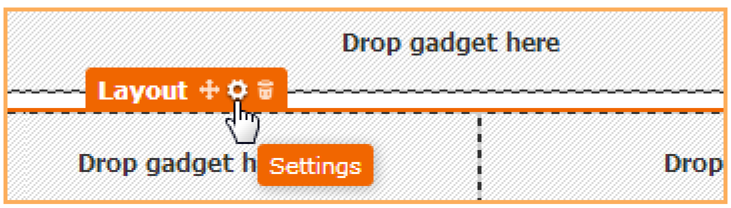
Read more/less

For example, the settings for a member directory gadget determine which member fields and records are displayed, and in what order.

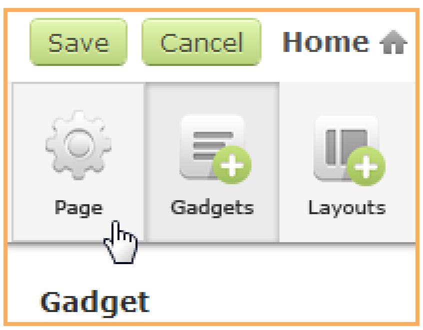
When you first add a new page, layout, or gadget – or begin editing a page – the settings for that element appears in a panel along the left side of the screen.



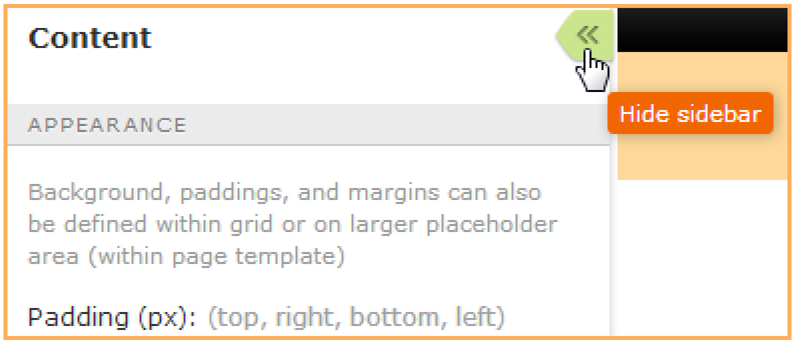
To display the settings for another layout or gadget on the same page, position your pointer over the gadget or layout, then click the settings icon.



To display the page settings again, click the **Page** icon towards the top of the screen.



To maximize the page design area, you can hide the settings panel. To hide the settings panel, click the left chevron at the top of the panel.



To show the hidden panel, click the right chevron.

Previewing site pages

In most cases, the changes you make to gadgets, layouts, and page settings are automatically reflected in the preview version of the page. This allows you to assess your changes before saving them.

Read more/less

However, some gadgets – such as the sharing buttons gadget and the Facebook Like box gadget – cannot be previewed in edit mode because they use code from third-party sources. To view the modified gadget as it will appear on your site page, you must first save your changes.

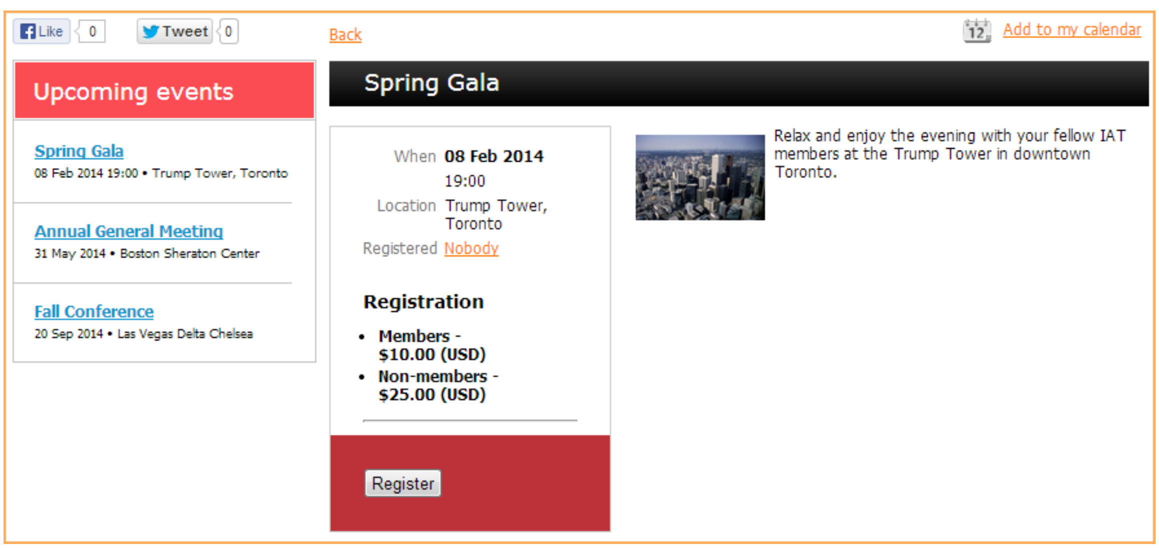
When previewing a site page in edit mode, the content will appear as it would to an administrator with your membership level. To view your site from the perspective of a visitor who is not logged in as a member or contact, simply log out of your account from either admin view or public view. For more information, see Switching between admin and public views.

Modifying system pages

You can also customize the system pages that perform routine functions such as authentication and event registration.

Read more/less

For example, you can customize the event details page with side columns or gadgets such as the upcoming events gadget.



Like site pages, system pages are based on page templates, and can contain layouts and gadgets.

On this page:

- How pages are assembled

Expand all sections

See also:

- Managing site pages
- Adding custom content
- Adding dynamic content
- Using the content editor
- Page templates
- Gadgets
- Layouts
- Website themes
- System pages

Page templates

Page templates

About page templates

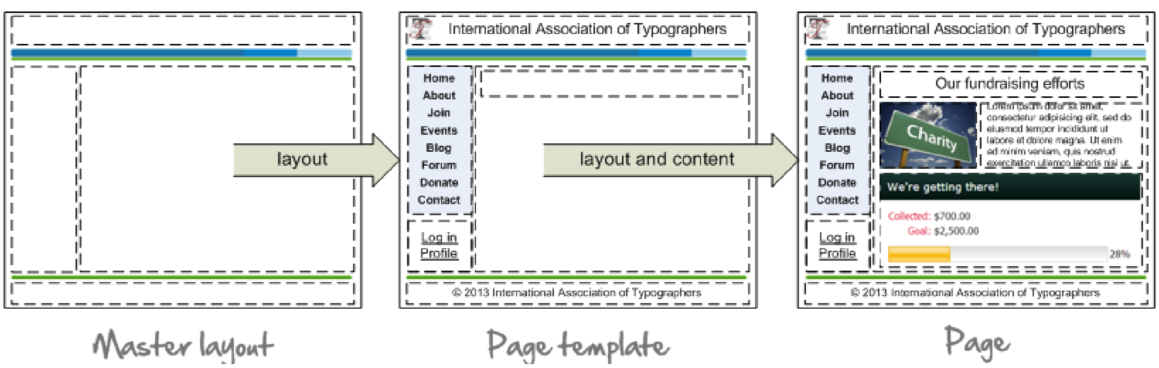
Page templates form the foundation for individual site pages, as well as system pages . Each page derives its layout from a template, and inherits any content that appears on the template.

Read more/less

You can set up multiple templates, each with its own layout and shared content. Each page can be based on a different template, and multiple pages can share the same template. You could, for example, use one template for public pages, another for member-only pages, and a separate one for landing pages.

Each page template is based on a particular master layout which defines the areas where content can be added. The master layout provides a broad outline of the page, which the page template can refine and add content to. The master layout can also contain graphical elements.

Each website theme contains a number of different master layouts which can form the basis of any number of different page templates.



You can design and modify page templates using the content editor, the same graphical editor used to edit individual web pages. Master layouts are not accessible through a graphical interface but can be modified through theme overrides.

Using templates as the basis for site pages has several benefits:

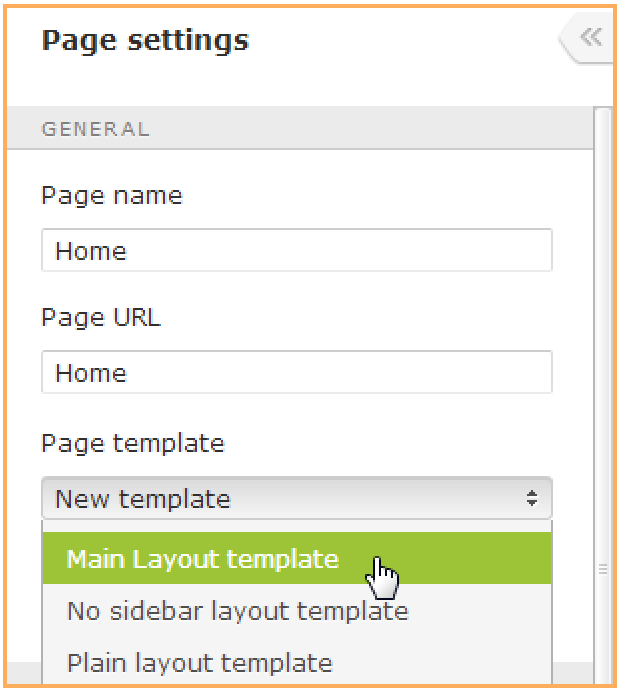
- Efficiency – shared content can be added or updated on a template then automatically applied to multiple pages without having to edit the pages one at a time
- Flexibility – selected pages, such as landing pages or member only pages, can appear different from the others

- Simplicity – changing the overall look and feel of your site can be accomplished using a graphical editor instead of CSS customization or theme overrides (though both are still available for this and other purposes)

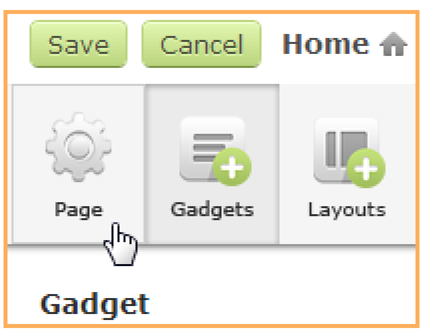
Assigning page templates to pages

You can assign a page template to a site page or system page from its page settings. The page settings appear in a panel on the left side you click the **Edit** button to begin modifying the page.

Read more/less



If you are already editing the page and the page settings are not displayed along the left side, click the **Page** icon towards the top of the screen.



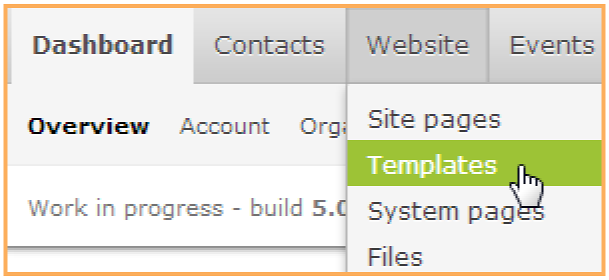
Switching to a different page template after you have begun modifying the page may result in layouts and gadgets changing position within the page. Switching back to the previous page template may not restore them to their previous positions. You can, however, restore a version of the page that was saved prior to switching templates.

Creating a page template

You can create a page template from scratch or by duplicating an existing template.

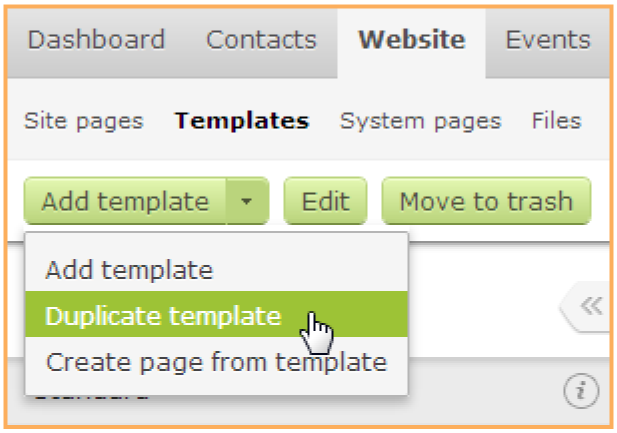
Read more/less

To create a page template, you begin by selecting the **Templates** option under the **Website** menu.

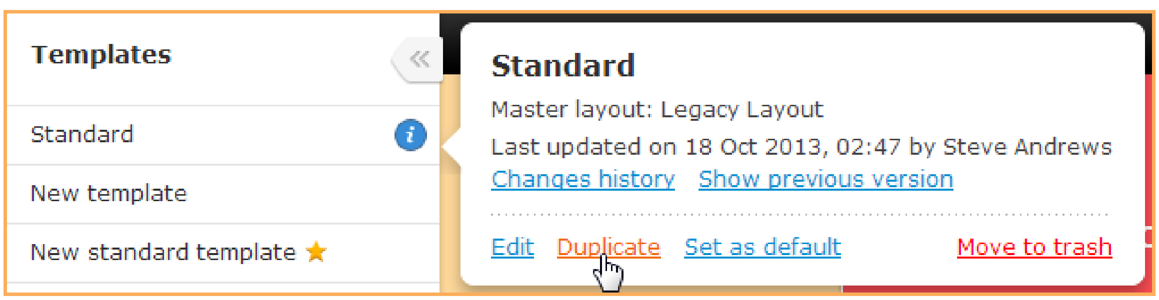


From the Templates screen that appears, you can create a new page template from scratch by clicking the **Add template** button.

To duplicate an existing page template, click the template you want to duplicate within the template list on the left then click the down arrow within the **Add template** button and choose the **Duplicate template** option.



Alternatively, you could display the information panel – by hovering over the information icon beside the template within the list – then click the **Duplicate** link.

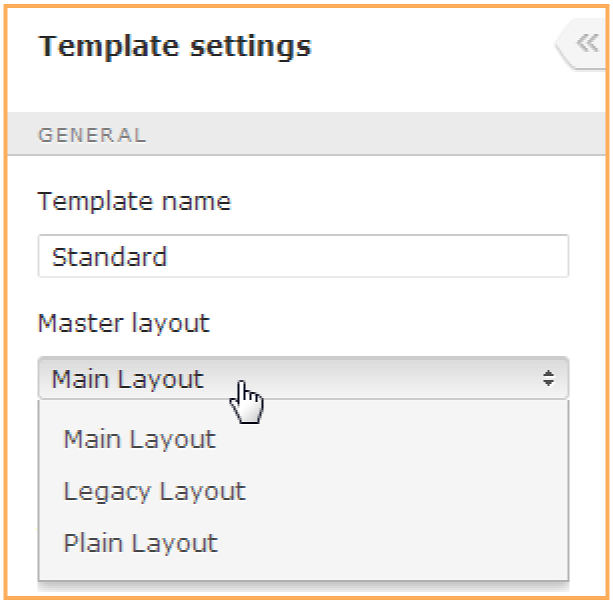


Template settings

When you create a new template, or open an existing template for editing, the settings for the template appear in a panel on the left.

Read more/less

Within the template settings, you can set the template name, and choose the master layout to used as the basis for the template.



Master layouts define the areas where content can be added to the template. Different master layouts are available depending on the currently selected website theme.

> Switching to a different master layout after you have begun modifying the template may result in layouts and gadgets changing position, both within the template and any sites or system pages that are based on that template. Switching back to the previous master layout may not restore them to their previous positions. You can, however, restore a version of the template that was saved prior to switching master layouts.

At the bottom of the template settings is a list of the site pages and system pages that use the template.

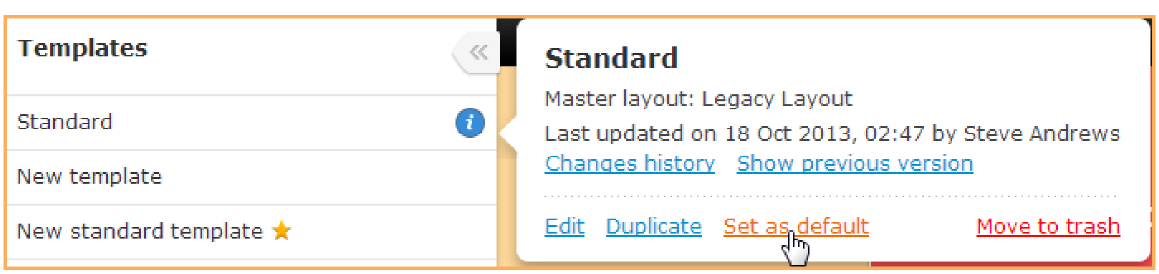
Setting the default template

Within the template list, one template is designated as the default template. The default template is the template automatically assigned to new pages.

Read more/less

Within the list, the default template is marked by a gold star.

To change which template is designated as the default template, display the information panel – by hovering over the information icon beside the template within the list – then click the **Set as default** link.



Modifying a template

You can design and modify page templates as you would individual web pages.

Read more/less

Within the page template, you can divide the page into sections by adding layouts. Layouts consist of one or more columns and rows. For example, you could add a 2-column layout to a template so that any pages based on it are automatically divided into 2 columns.

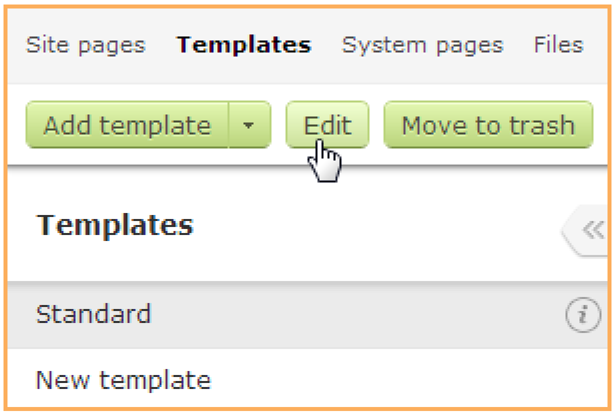
You can insert gadgets to add dynamic functionality or static content. Any content that appears on the template – menus, site headings, login boxes, headers, and footers – is also inherited by the pages that use it. Page headers and footers are simply the content that appears at the top and bottom of the template and thereby, the top of each page that is based on it. For instructions on setting up page headers and footers within a page template, see Page headers and footers.

Any changes made to a template are automatically applied to all pages that are based on that template.

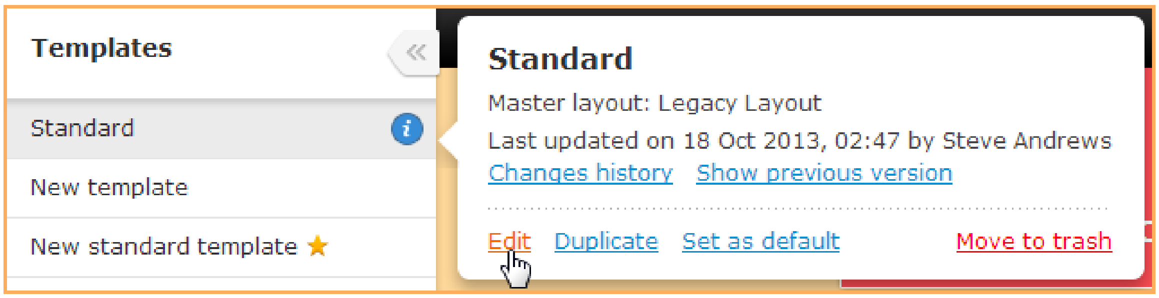
(For instructions on modifying site-wide elements, including background image, see Customizing colors and styles.)

To modify a page template, follow these steps:

1. Hover over the **Website** menu and select the **Templates** option.
2. Within the list of templates on the left, click the template you want to modify. The selected template will appear on the right.
3. Click the **Edit** button.



Alternatively, you could display the information panel – by hovering over the information icon beside the template within the list – then click the **Edit** link.



4. Now, you can modify the template settings in the panel on the left, or click the **Gadget** or **Layout** drop-downs to insert gadgets and layouts. You can modify the content of existing gadgets by clicking the gadget then using the options appearing on the editing toolbar to insert or modify text, graphics, links, and other elements. You can also adjust settings for layouts and gadgets by hovering over the layout or gadget and clicking the Settings icon. For more information, see Designing site pages. You can also adjust placeholder settings (see below).
5. When you are finished modifying the system page, click the **Save** button.

Singular gadgets – those that cannot be combined with other singular gadgets on the same page – are not available when modifying page templates. The following is a list of singular gadgets:

- Blog
- Discussion forum
- Donation form
- Event calendar
- Forum summary

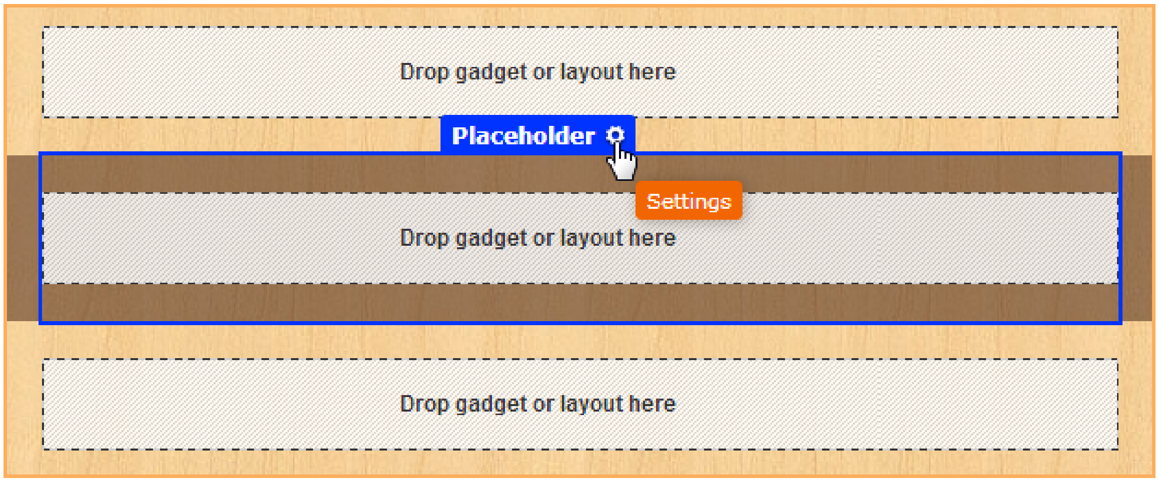
- Membership application
- Member directory
- Photo album
- Subscription form

Placeholder settings

Within a page template, placeholders define the areas where content – in the form of layouts and gadgets – can be placed. The page template inherits the placeholders from the master layout, forming the foundation for the template. You cannot add or remove placeholders, but you can adjust the settings of individual placeholders, including height.

> ⚠ The width of a placeholder is determined by its theme, and can have a fixed width (as in older themes) or a responsive width that varies according to the device (as in newer themes like the Treehouse or Simple themes).

Placeholder settings appear in a panel on the left side (which can be hidden to maximize the page design area). To display the settings panel, you position your pointer over the placeholder – while editing the page template – then click the placeholder's Settings icon.



The following placeholder settings are available:

Setting	Description
Padding	Controls how much blank space – in pixels – appears inside the placeholder.
Background color	The background color of the placeholder. To set the background color, you can click a color or enter the hex code for the color. To make the background transparent, so that the site background shows through, click the **Set to transparent** button. Whether the background color shows through or not may depend on the style settings of any gadgets that appear in the placeholder.
Background image	The background image that appears in the placeholder. To select a background image, click the **Select** button then select an images from the image library or click **Own resources** to select an image from File management. After you have selected the background image, click **Apply background**. Whether the background image shows through or not may depend on the style settings of any gadgets that appear in the placeholder. After you have applied a background image, you can control the horizontal and vertical alignment, and choose how your image appears within the available space. You can choose from the following **Behavior** options:

Option	Description	
Tile	The image will be repeated horizontally and vertically to completely fill the available space.	
No repeat or scaling	The image will displayed as is, and will be not be repeated or scaled.	
Repeat horizontally	The image will be repeated horizontally to fill the width of the available space.	
Repeat vertically	The image will be repeated vertically to fill the height of the available space.	
Fill	The image will be stretched to completely fill the available space, and may therefore appear distorted.	
Cover	The image will be proportionally resized to cover the available space, and may therefore be cropped.	
Scale by height	The image will be proportionally resized to fit the height of the available space. Depending on the dimensions of the space, the image may be cropped, or may not fill the entire width of the space.	

<table>
<tr><td></td><td><table><tr><td>Scale by width</td><td>The image will be proportionally resized to fit the width of the available space. Depending on the dimensions of the space, the image may be cropped, or may not fill the entire height of the space.</td><td></td></tr></table>To remove the existing background image, click the Remove link .</td></tr>
<tr><td>Height</td><td>The height of the placeholder. You can allow the height to be set automatically based on the content added to the placeholder – by clicking the Auto option – or set the height yourself by clicking Fi xed then entering the height in pixels. To adjust the height of the placeholder to the background image – if one has been selected – click the Adjust height to background image link, and the height of the placeholder will be automatically set to the height of the image.</td></tr>
<tr><td>HTML ID</td><td>A unique identifier by which the placeholder can be referenced within custom CSS or JavaScript code. The identifier is automatically generated but can be replaced with a more readable or memorable one.</td></tr>
<tr><td>CSS class</td><td>The name of a CSS class whose values have been entered on the CSS customization screen.</td></tr>
<tr><td>Inline style</td><td>CSS code to control the behavior or appearance of the placeholder. For example, you could enter CSS code to control the width of the placeholder.</td></tr>
</table>

If you set both a background color and background image for a placeholder, only the background image will be displayed.

Sticky placeholders

(For Blueprint, Fiesta, and Homestead themes) A special placeholder is available that you can use within a page template to create a non-scrolling area at the top of your page, or within a sidebar.

Read more/less

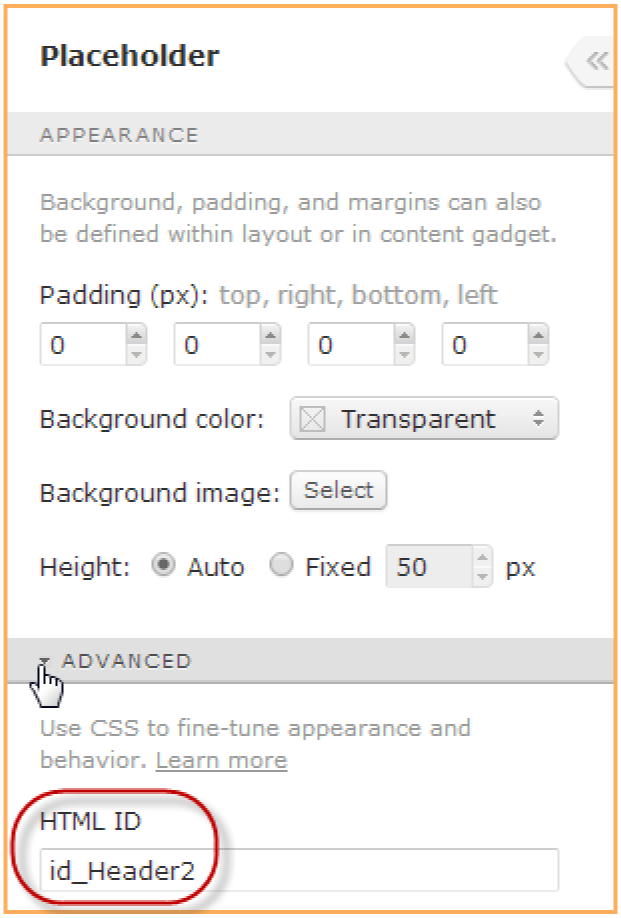
Within this "sticky" placeholder, you can place any content, including your site menu – thereby creating a sticky menu. Any content positioned within this placeholder will remain in position as you scroll through the rest of the page.

The sticky behavior is disabled within admin view, and can only be seen in public view. Sticky placeholders will not stick for Fiesta themes on mobile browsers.

Since a sticky menu does not scroll, you should limit the number of items in any drop-down menu so that they do not drop off the bottom of the screen. You should also keep in mind that fewer drop-down menu items can fit on mobile device screens.

You should not place a menu gadget within a sticky placeholder if you have enabled responsive behavior.

Sticky placeholders are identified by its **HTML ID** field value, which you can view within the **Advanced** section of the placeholder settings.



The HTML ID for sticky placeholders varies according to theme and master layout.

Theme	Master layout	HTML ID
Blueprint	Main layout	id_Header1
	Sidebar layout	id_LeftSidebar
Fiesta	Main layout	id_Header2
Homestead	Main layout	id_Header1

For Blueprint themes, you also have to add the following code to the CSS customization screen to make the id_Header1 placeholder sticky:

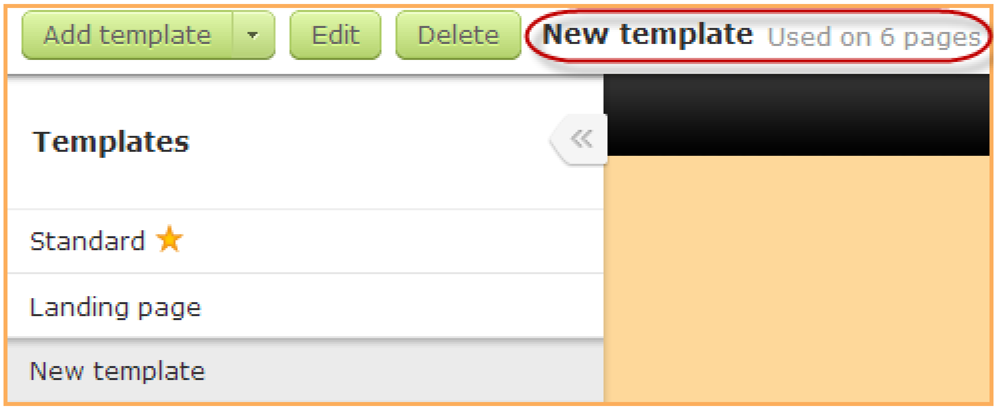
```
.header1StickyWrapper.stick {
        position: fixed;
        top: 0;
        z-index: 1000;
}
```

Deleting a template

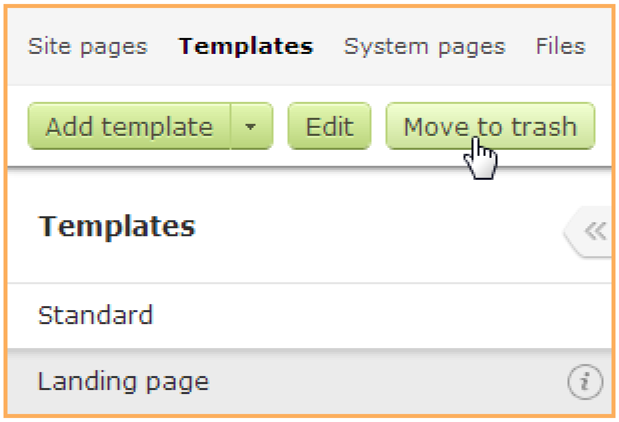
You cannot delete a template that is being used by a site page or system page. You must switch the page(s) to a different template before you can delete the template.

Read more/less

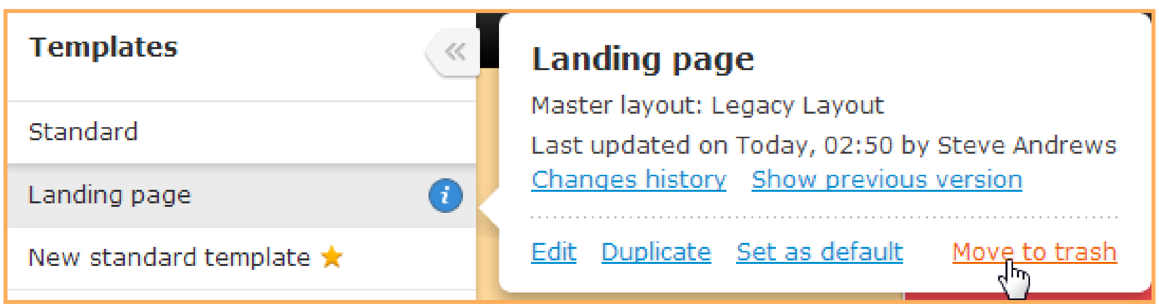
The number of pages that are using a template is indicated when you select the template within the list.



To delete an unused template, select it within the list on the **Templates** screen, then click the **Move to trash** button.



Alternatively, you can display the information panel – by hovering over the information icon beside the template within the list – then click the **Move to trash** link.



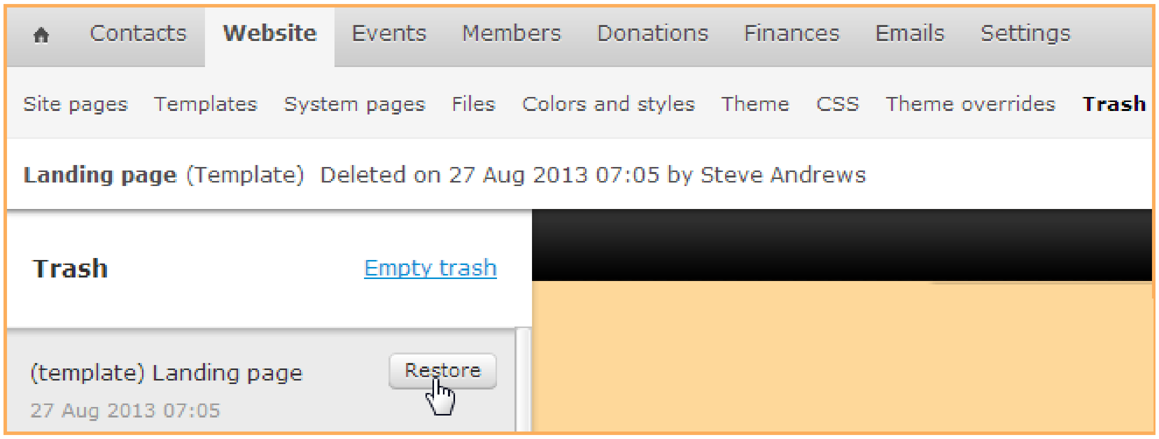
In either case, the template will be moved from the template list to the trash. From the trash, you can restore the template or delete it permanently, along the rest of the deleted pages and page templates.

Restoring a deleted template

To restore a deleted page template, follow these steps:

Read more/less

1. Click the **Trash** option under the **Website** menu.
2. Within the list of deleted pages and template, click the template you want to restore.
3. Click the **Restore** button beside the selected template.



Once the trash is emptied, its previous contents cannot be restored.

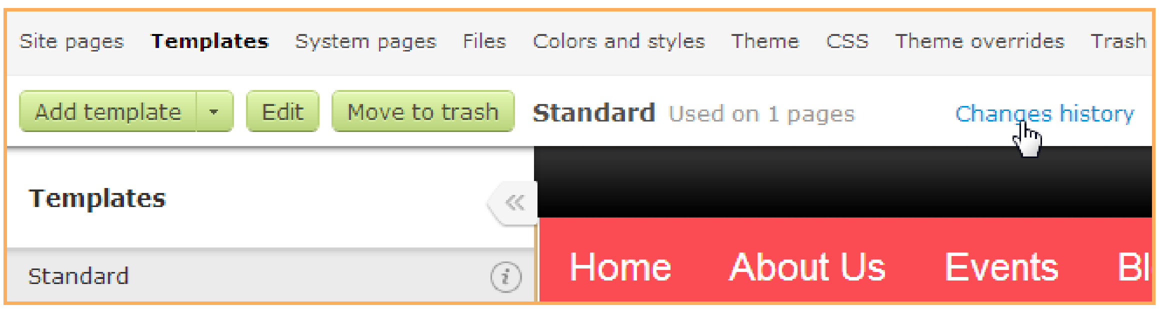
Restoring previous versions

Each time you save changes to a page or page template, a separate version is saved. You can view the previous versions of any page or template, and restore any version.

Read more/less

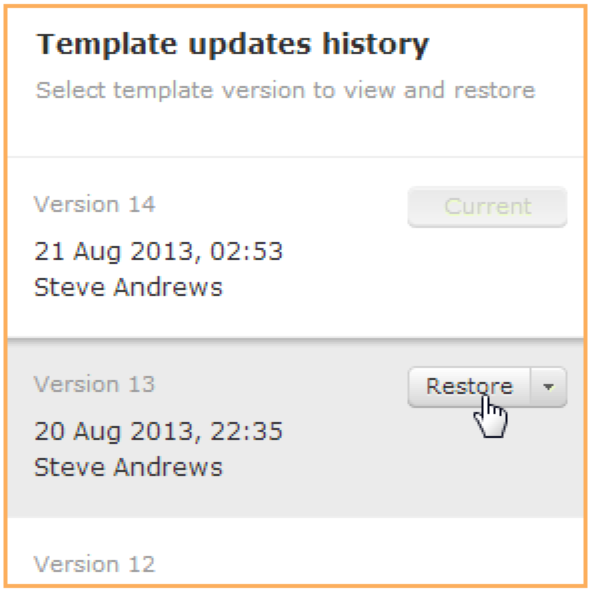
Within the version history, you can also view who made the changes and when.

To view the version history for a page or template, click the page or template within the list, then click the **Changes history** link on the right side of the screen.



For each version in the list, the time and date of the change is displayed, along with the name of the user who made the change.

To restore a previous version of the page or template, select the version within the list and click the **Restore** button.

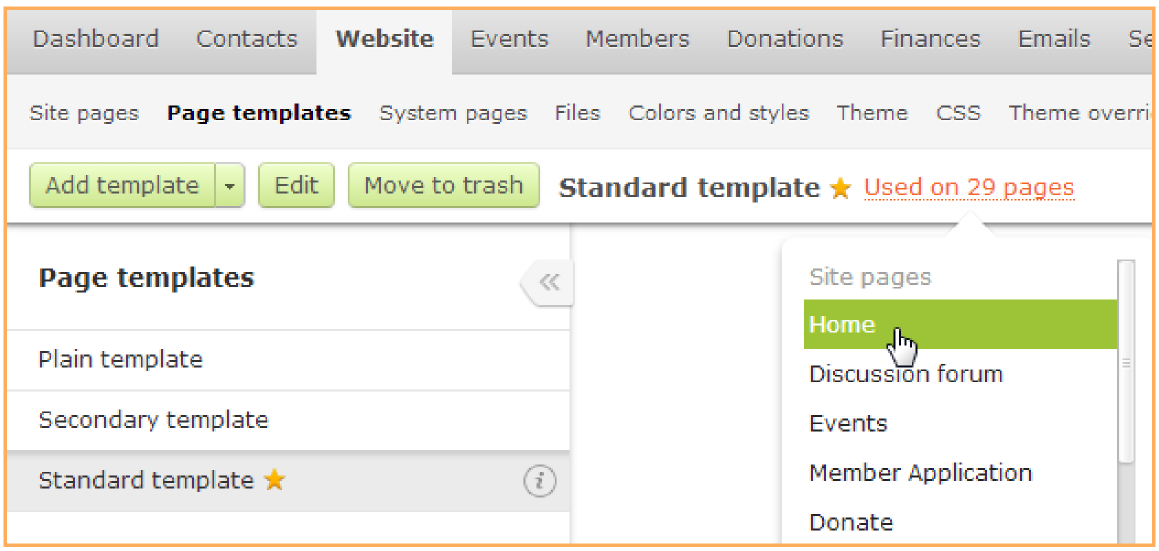


For more information, see Version history.

Tracking template use

To see which pages are using a particular page template, select the template within the list then hover over **Used on *x* pages** beside the template name.

Read more/less



You can jump to one of the pages by clicking it within the list.

What can't you do with page templates?

- You cannot delete a template that is being used by a site page or system page

Using page templates (4:59)

On this page:

- About page templates
- Assigning page templates to pages
- Creating a page template
- Template settings
- Setting the default template
- Modifying a template
- Sticky placeholders
- Deleting a template
- Restoring a deleted template
- Restoring previous versions
- Tracking template use
- What can't you do with page templates?

Expand all sections

See also:

- Master layouts
- Customizing colors and styles
- Setting the site background
- Page headers and footers

Layouts

Layouts

About layouts

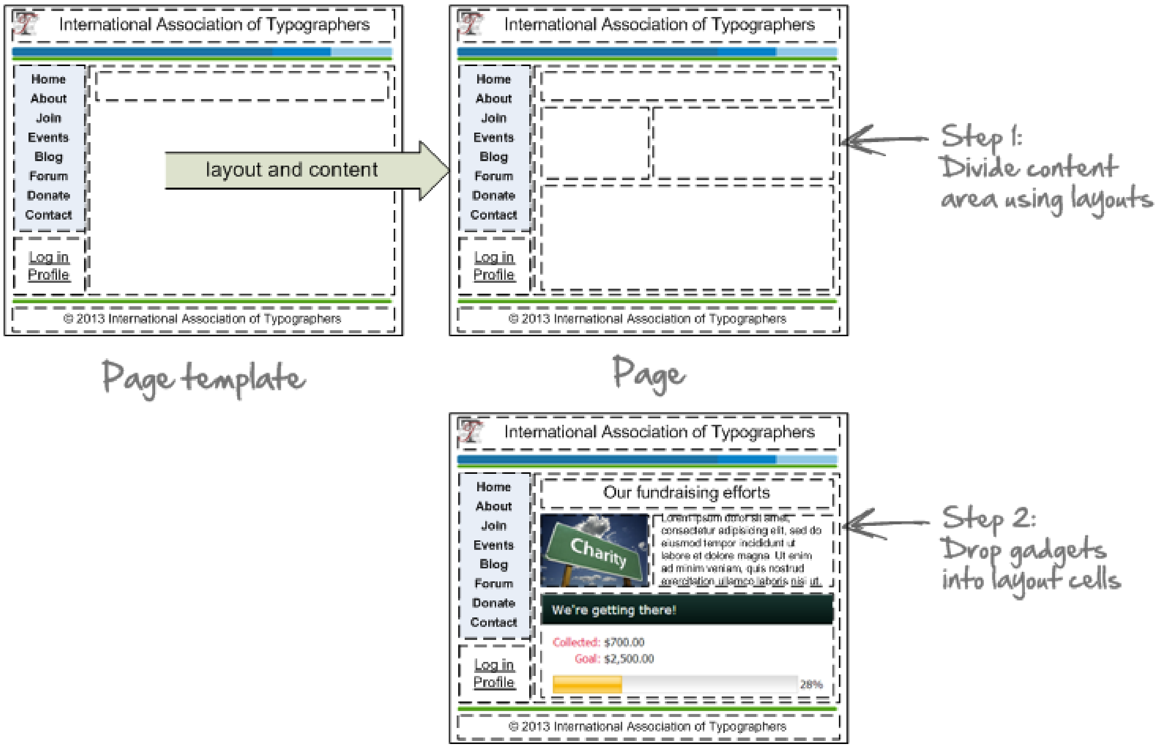
You can use layouts to divide a page or page template into sections and subsections. Layouts allow you to create complex site pages consisting of multiple rows and columns.

Read more/less

Layouts divide content areas into cells where you drag and drop gadgets.

You can add layouts to a page template so that the layout is inherited by all pages that use that template. For example, you could add a 2-column layout to a template so that any pages based on it are automatically divided into 2 columns.

Though the overall layout of a page is inherited from its page template – along with any content appearing on the template – you can further refine the page layout by adding layouts before or after the layouts inherited from the page template.



You don't have to add layouts to a page or page template. You can simply insert gadgets into the placeholders inherited by the page from the page template, or by the page template from the master layout.

For each layout cell, you can control various settings, including margins and background color or image.

Available layouts

The following layouts are available:

Read more/less

- One column
- Two columns
- Three columns
- Four columns
- Custom

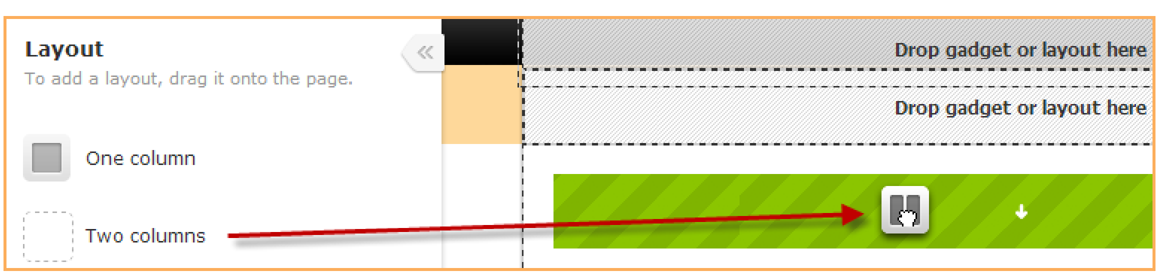
Using a custom layout, you can use HTML code to create complex page layouts. For more information, see Defining a custom layout (below).

Adding a layout

You can add any number of layouts to a page or page template.

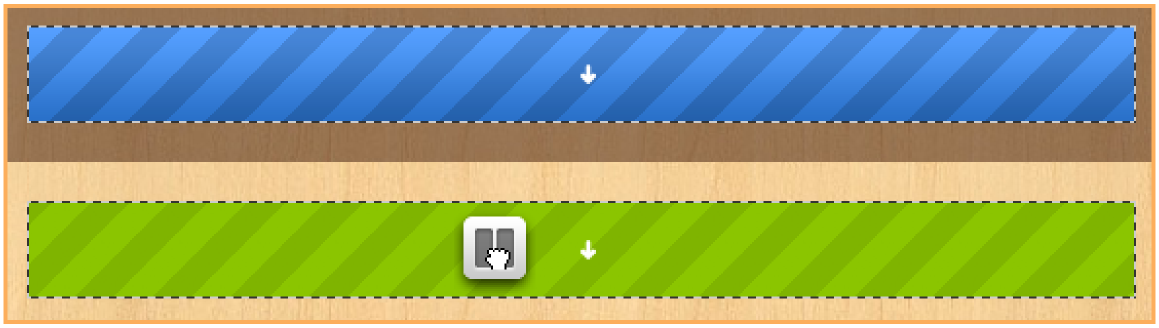
Read more/less

To insert a layout while editing a site page or a page template, you drag and drop the layout from the layout list to the desired location.

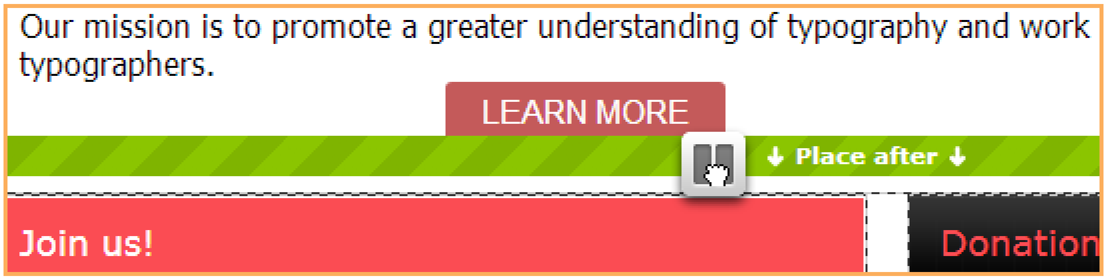


Within a page template, you can insert one or more layouts into a placeholder, but not before or after one.

When a placeholder is empty, a **Drop gadget or layout here** prompt will be displayed. When you drag a layout over an empty placeholder, the placeholder turns green, indicating that you can drop the layout into the placeholder. Other possible destinations for the layout will appear in blue.



Within a page, you can insert layouts before or after layouts inherited from the page template...



...or directly into a placeholder if no layouts were added to the placeholder in the page template.

When you drag a layout above or below an existing layout, a prompt will appear indicating where you can drop the layout, either after or before the existing layout.

> You cannot subdivide a layout by adding another layout to it.

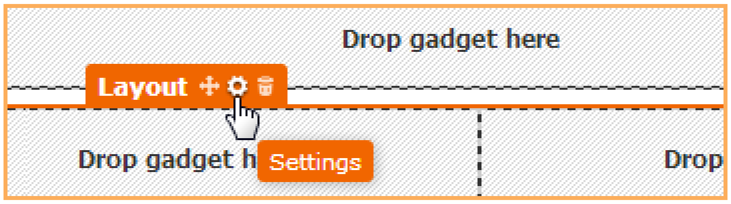
Layout settings

For each layout column, you can control various settings, including margins and background color or image. Layout settings appear in a panel on the left side (which can be hidden to maximize the page design area).

Read more/less

> Layouts can be further customized using theme overrides and CSS customization.

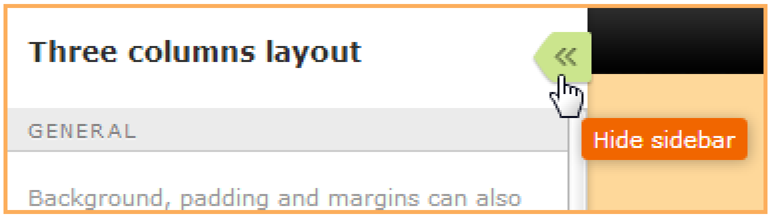
To display the settings panel, you position your pointer over the layout – while editing a site page or a page template – then click the settings icon.



If the layout already contains a gadget, make sure you click the settings icon for the layout rather than the gadget.

Hiding the settings panel

To hide the settings panel, click the left chevron at the top of the panel.



To show the hidden panel, click the right chevron.

Common layout settings

The layout settings that are available depend on the layout type, but a number of settings are available for all layouts.

These settings are described below.

<table>
<tr><th>Setting</th><th>Description</th></tr>
<tr><td>Margins</td><td>Controls how much empty space – in pixels – appears outside the layout.</td></tr>
<tr><td>Background color</td><td>The background color of the layout. You can set the background separately for each column in the layout. To set the background color, you can click a color or enter the hex code for the color. The colors used in the current website theme are displayed at the top of the color window. To make the background transparent, so that the page background shows through, click the Set to transparent button. Whether the background color shows through or not may depend on the style settings of the gadgets that appear in the layout. If you set both a background color and background image for a layout, only the background image will be displayed.</td></tr>
<tr><td>Background image</td><td>The background image that appears in the layout. Setting a background image for a layout allows the gadgets that are added to the layout to appear superimposed on the graphic image. To select a background image, click the Select button then select an images from the image library or click Own resources to select an image from File management. After you have selected the background image, click Apply background. Whether the background image shows through or not may depend on the style settings of the gadgets that appear in the layout.

After you have applied a background image, you can control the horizontal and vertical alignment, and choose how your image appears within the available space. You can choose from the following Behavior options:

<table>
<tr><th>Option</th><th>Description</th><th></th></tr>
<tr><td>Tile</td><td>The image will be repeated horizontally and vertically to completely fill the available space.</td><td></td></tr>
</table>
</td></tr>
</table>

No repeat or scaling	The image will displayed as is, and will be not be repeated or scaled.	
Repeat horizontally	The image will be repeated horizontally to fill the width of the available space.	
Repeat vertically	The image will be repeated vertically to fill the height of the available space.	
Fill	The image will be stretched to completely fill the available space, and may therefore appear distorted.	
Cover	The image will be proportionally resized to cover the available space, and may therefore be cropped.	
Scale by height	The image will be proportionally resized to fit the height of the available space. Depending on the dimensions of the space, the image may be cropped, or may not fill the entire width of the space.	
Scale by width	The image will be proportionally resized to fit the width of the available space. Depending on the dimensions of the space, the image may be cropped, or may not fill the entire height of the spacE.	

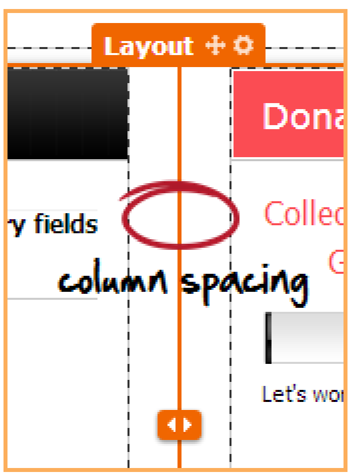
To remove the existing background image, click the **Remove** link .

Height	The height of the layout. You can allow the height to be set automatically based on the content added to the layout – by clicking the **Auto** option – or set the height yourself by clicking **Fixed** then entering the height in pixels. To adjust the height of the layout to the background image – if one has been selected – click the **Adjust height to background image** link, and the height of the layout will be automatically set to the height of the image. The width of a layout is normally determined by the placeholder in which it is placed, though you can use the **Inline style** setting (below) to set the layout width.
HTML ID	A unique identifier by which the layout can be referenced within custom CSS or JavaScript code. The identifier is automatically generated but can be replaced with a more readable or memorable one.
CSS class	The name of a CSS class defined on the CSS customization screen.
Inline style	CSS code to control the behavior or appearance of the layout. For example, you could enter *width: 250px;* to control the layout width.

Settings for multi-column layouts

For layouts with multiple columns, you can also control column spacing – the blank space (in pixels) between columns – and set the padding, background color, and background image for individual columns.

Column spacing is the space between multiple columns.



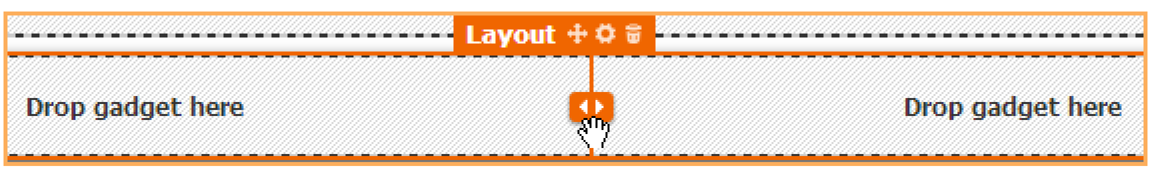
Column padding is the amount of blank space between the content of a particular column and the outer limits of the column.

If you set both column spacing and column padding, the values will combine to increase the internal column margin.

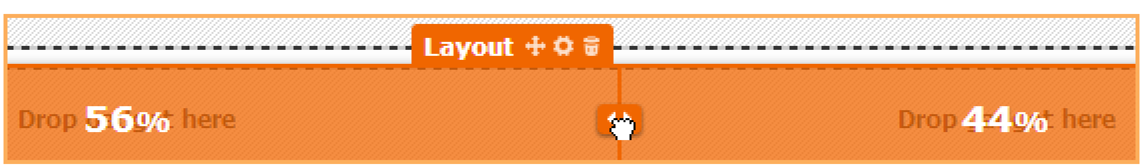
Adjusting column widths

For layouts with multiple columns – other than custom layouts – you adjust the column widths by positioning your pointer over a column divider then dragging to the left or right.

Read more/less



As you drag, percentages appear in the columns to indicate their relative sizes.



Once the columns are the desired widths, release your mouse button.

Defining a custom layout

Using a custom layout, you can combine HTML code with *placeholder* code to create sophisticated layouts. Placeholders define the areas within the custom layout where gadgets can be dropped.

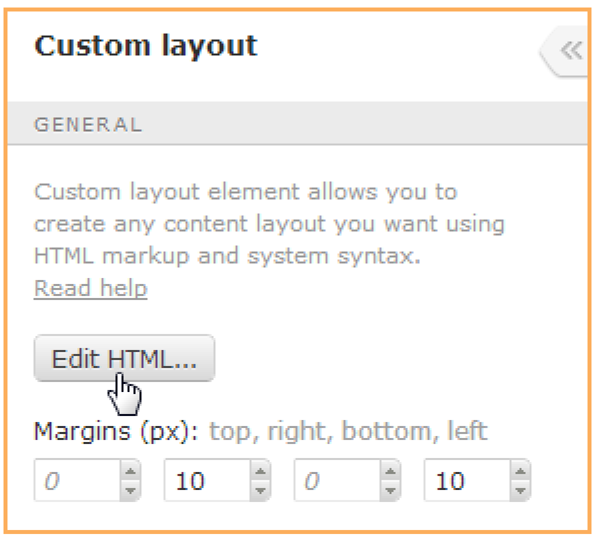
Read more/less

For example, you can use the following to create a layout consisting of 2 columns followed by a single row.

```
<div>
<div style="display: table; width: 100%">
<div style="display: table-row;">
<div style="width: 50%; display:table-cell">
##placeholder##
</div>
<div style="width: 50%; display:table-cell;">
##placeholder##
</div>
</div>
</div>
##placeholder##
```

Within your HTML code, each ##placeholder## element marks the spot where a gadget can be dropped onto the layout.

To enter the code that defines a custom layout, you click the **Edit HTML** button within the custom layout's settings.



In the window that appears, you enter your code then click the **Save** button.

Your code cannot be empty, and must include at least one ##placeholder## element. If you do not include a ##placeholder## element, one will be automatically inserted into your code.

Within your code, a unique identifier will be appended to each ##placeholder## element after saving. A ##placeholder## element might end up appearing as ##placeholder:TV1pmdG##. This allows the system to uniquely identify and reference each individual placeholder.

Code restrictions

Do **not** include any of the following commands within your custom code.

- document.write()
- document.writeln()
- document.open()
- object.write()

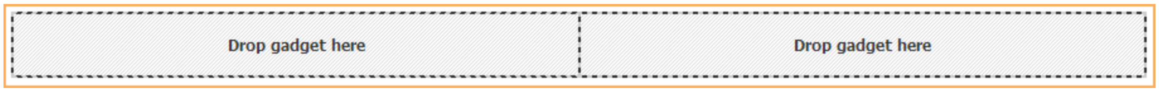
- object.writeln()
- object.open()

where *object* is the name of a target object.

Sample custom layout code

The following are code samples showing how to achieve different kinds of layouts using custom layouts.

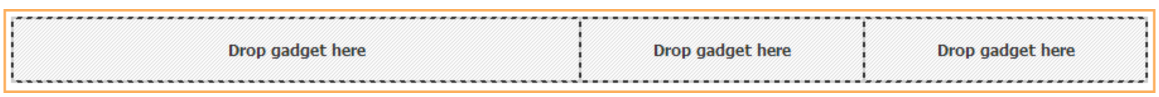
Two columns




```
<div>
<div style="display: table; width: 100%">
<div style="display: table-row;">
<div style="width: 50%; display:table-cell">
##placeholder##
</div>
<div style="width: 50%; display:table-cell;">
##placeholder##
</div>
</div>
</div>
```

> You can adjust the column widths by adjusting the **width** parameter value (e.g. change the two 50% values to 75% and 25%).

Three columns with different widths




```
<div>
<div style="display: table; width: 100%">
<div style="display: table-row;">
<div style="width: 50%; display:table-cell">
##placeholder##
</div>
<div style="width: 25%; display:table-cell;">
##placeholder##
</div>
<div style="width: 25%; display:table-cell;">
##placeholder##
</div>
</div>
</div>
```

Two columns followed by one row

```
<div>
<div style="display: table; width: 100%">
<div style="display: table-row;">
<div style="width: 50%; display:table-cell">
##placeholder##
</div>
<div style="width: 50%; display:table-cell;">
##placeholder##
</div>
</div>
</div>
##placeholder##
```

Other <div> style parameters

Within each <div> tag, you can include other CSS properties than just width. For example, you include a **background** to adjust the background color of the layout cell, or the **border-radius** parameter to give it a rounded border.

For example, the following custom layout code...

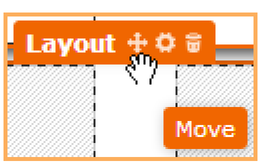
```
<div>
<div style="display: table; width: 100%">
<div style="display: table-row;">
<div style="width: 50%; display:table-cell;background: #444441; border-radius:
50px;">
##placeholder##
</div>
<div style="width: 50%; display:table-cell;">
##placeholder##
</div>
</div>
</div>
```

...results in the layout appearing like this:

For more information on CSS properties, see the CSS properties guide.

Moving a layout

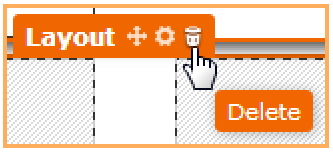
To move a layout to a different location, position your pointer over the layout – while editing a site page or a page template – then drag the move icon to the new location.



You can move the layout into another placeholder, or to a location above or below another layout.

Deleting a layout

You can delete a layout even if it contains gadgets. To delete a layout – while editing a site page or a page template – position your pointer over the gadget then click the Trash icon.

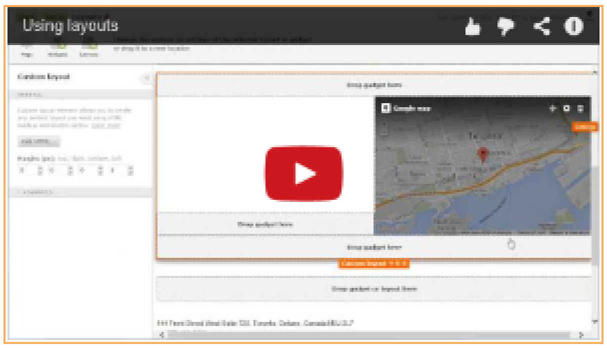


If the layout contains one or more gadgets, you will asked to confirm your intention to delete the layout.

Deleted layouts are **not** sent to the Trash and cannot be restored from the Trash.

What can't you do with a layout?

- You cannot add a layout to another layout.
- You cannot add a layout above or below a placeholder in a page template.



Video: Using layouts (4:10)

On this page:

Expand all sections

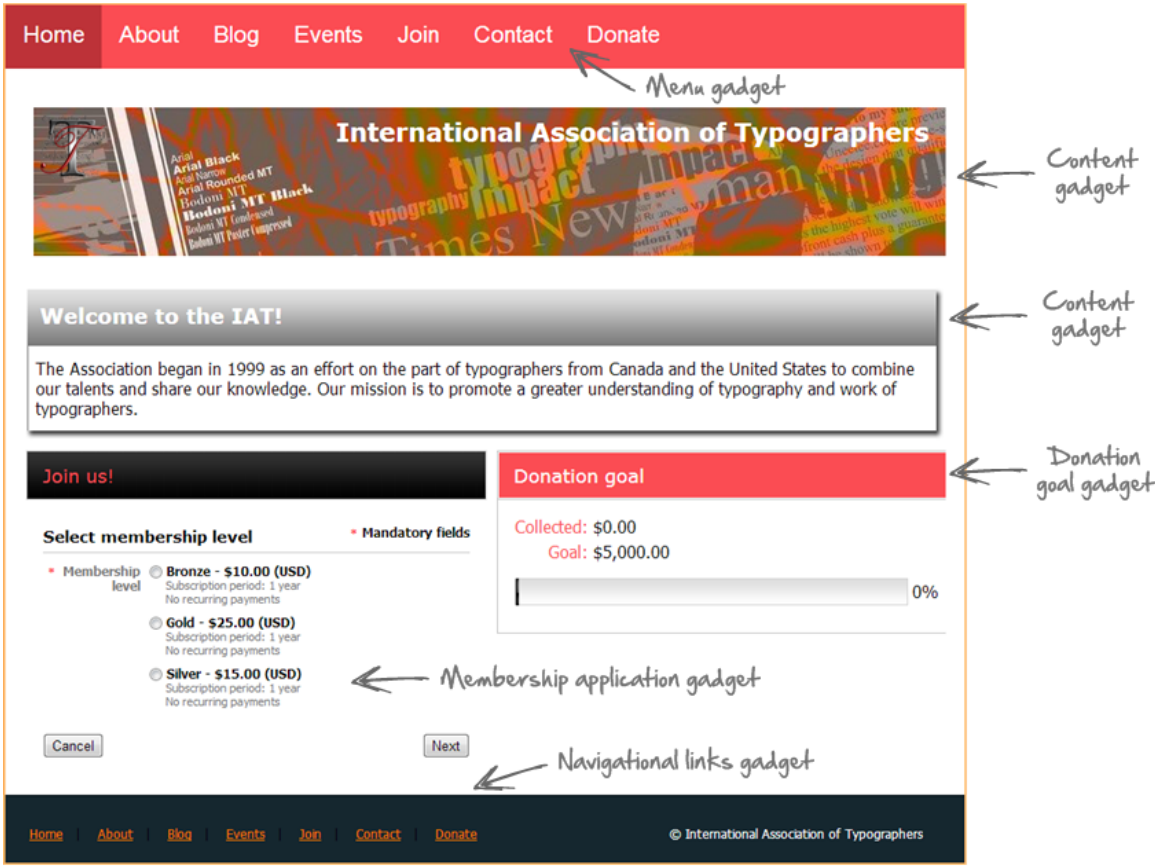
Gadgets

Gadgets

What is a gadget?

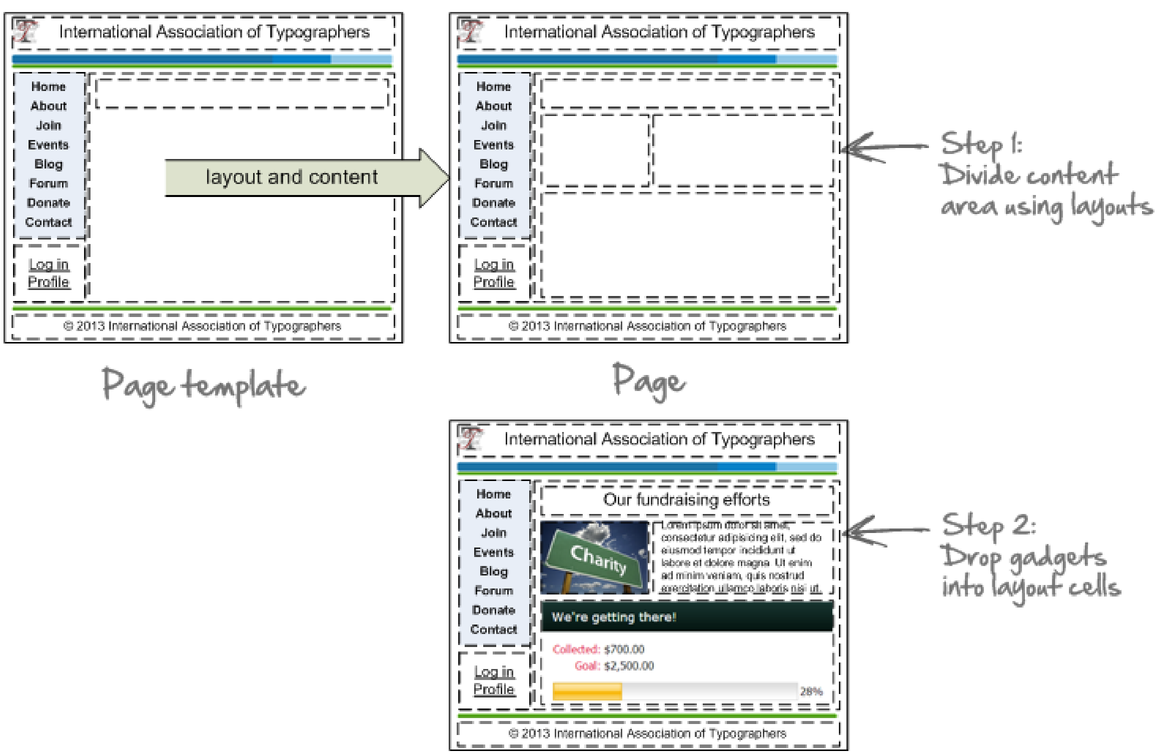
A gadget is an element on a web page that displays content. The content can be static content such as text or a picture, or dynamic content s uch as a membership registration form, a blog, or a list of upcoming events.

Read more/less



Gadgets are the building blocks of Wild Apricot site pages. Each page consists of one or more gadgets arranged within page-specific lay outs or theme-specific placeholders.

A gadget can be inserted into a cell within a layout, or inserted above or below a layout. Gadgets can be added to individual site pages or to a page template so that all pages that use that template will automatically display the gadget.



For information on embedding Wild Apricot functionality on external websites, click here.

Inserting a gadget

Gadgets can be inserted a number of locations, including:

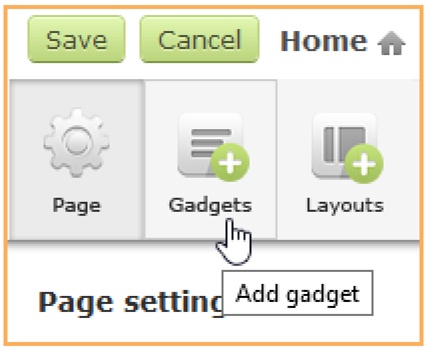
Read more/less

- into a cell within a layout, either within the page or within the page template used by the page
- above or below a layout
- above or below another gadget
- into a placeholder within the page or page template

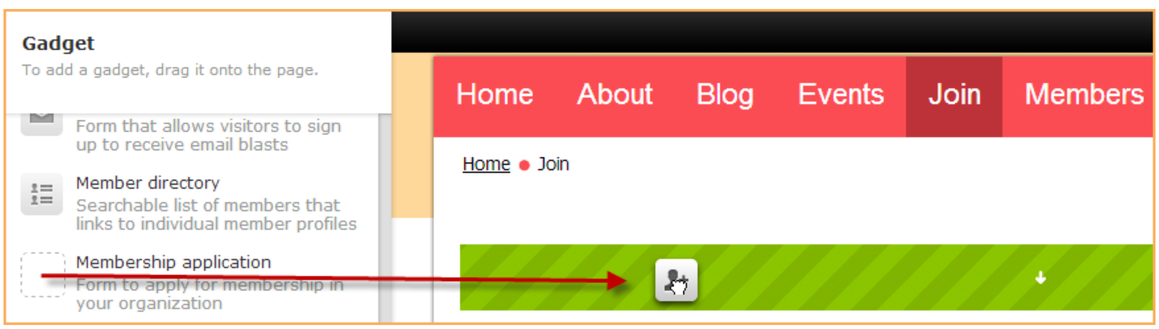
Placeholders are inherited by the page template from a master layout and define the areas where layouts and gadgets can appear.

To insert a gadget, follow these steps:

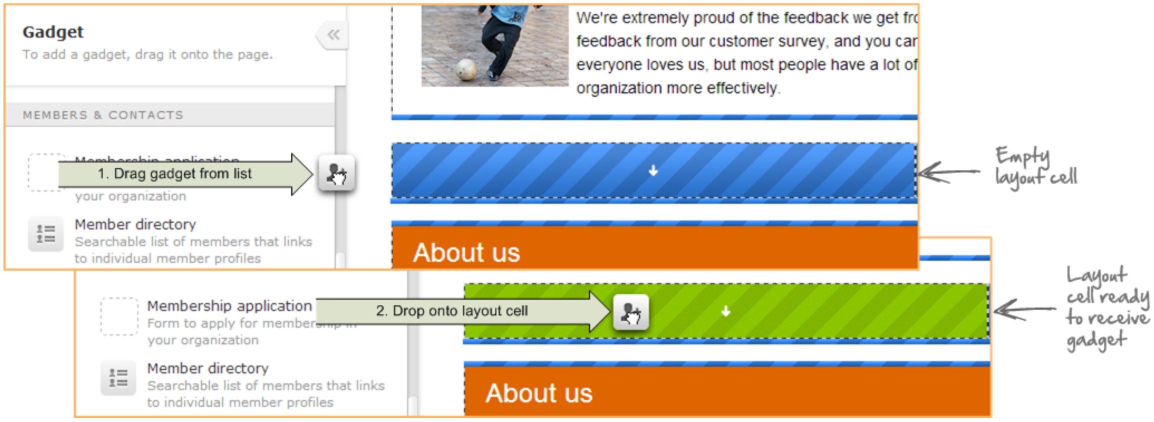
1. Begin editing the site page or page template.
2. Click the **Gadgets** icon to display the list of available gadgets.



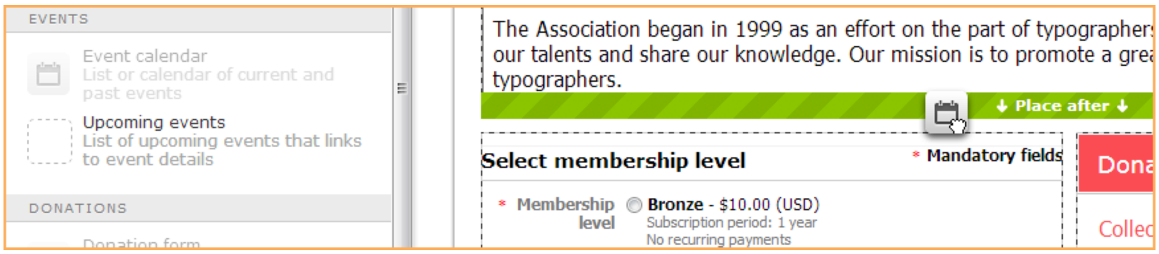
3. Drag the gadget you want to insert from the Gadget list, and drop it on the desired location.



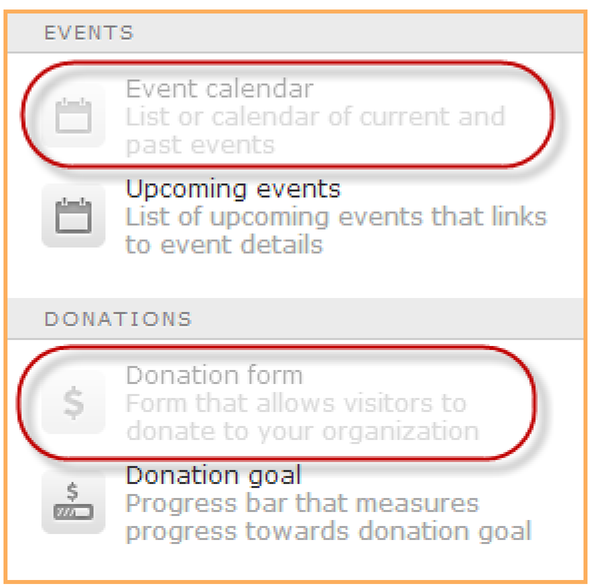
When a layout cell or placeholder is empty, a **Drop gadget or layout here** prompt will be displayed. When you begin dragging a gadget, possible destinations for the gadget appear blue. When you drag a gadget over an empty layout cell or placeholder, it turns green, indicating that you can drop the gadget there.



When you drag a gadget above or below a layout or another gadget, a prompt will appear indicating that you can drop the gadget before or after the layout.



Some gadgets – called singular gadgets – cannot be combined with other singular gadgets on the same page, and are therefore not available when editing templates or system pages. Once a singular gadget is added to a page – either directly or through the page template – all singular gadgets become disabled within the gadget list.



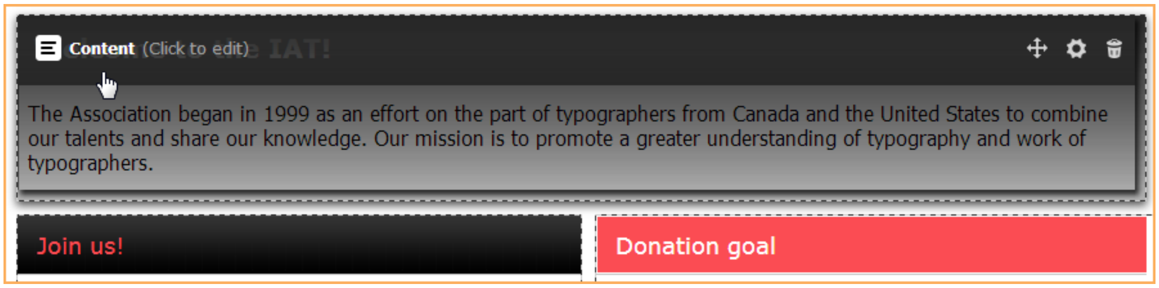
Controlling the content of the gadget

For most gadgets, the content is automatically retrieved and displayed. For content gadgets – displaying static rather than dynamic content – you add content to the gadget using the content editor .

Read more/less

For example, the information displayed by a member directory gadget is extracted from your Wild Apricot database and displayed without further effort on your part. The appearance and behavior can be controlled using the gadget's settings, but the actual content of the gadget is automatically rendered.

To add content to a content gadget while editing a site page or page template, position your pointer over the gadget then click anywhere within the gadget.



The type of gadget is always identified when you hover over the gadget.

Once you have opened the content gadget for editing, you can add or modify text, picture, tables, links, and other content. Your changes will be reflected in the preview version of the page. For more information, see Using the content editor.

For some gadgets, such as the Facebook Like box gadget and Sharing buttons gadget, the gadget cannot be previewed in edit mode. To view these gadgets in action, you must save any changes to the page.

Gadgets added to a page template can only be modified while editing the template. Gadgets that cannot be modified while editing a page are marked by diagonal stripes.

Gadget settings: controlling appearance and behavior

By modifying a gadget's settings, you can control its appearance and behavior.

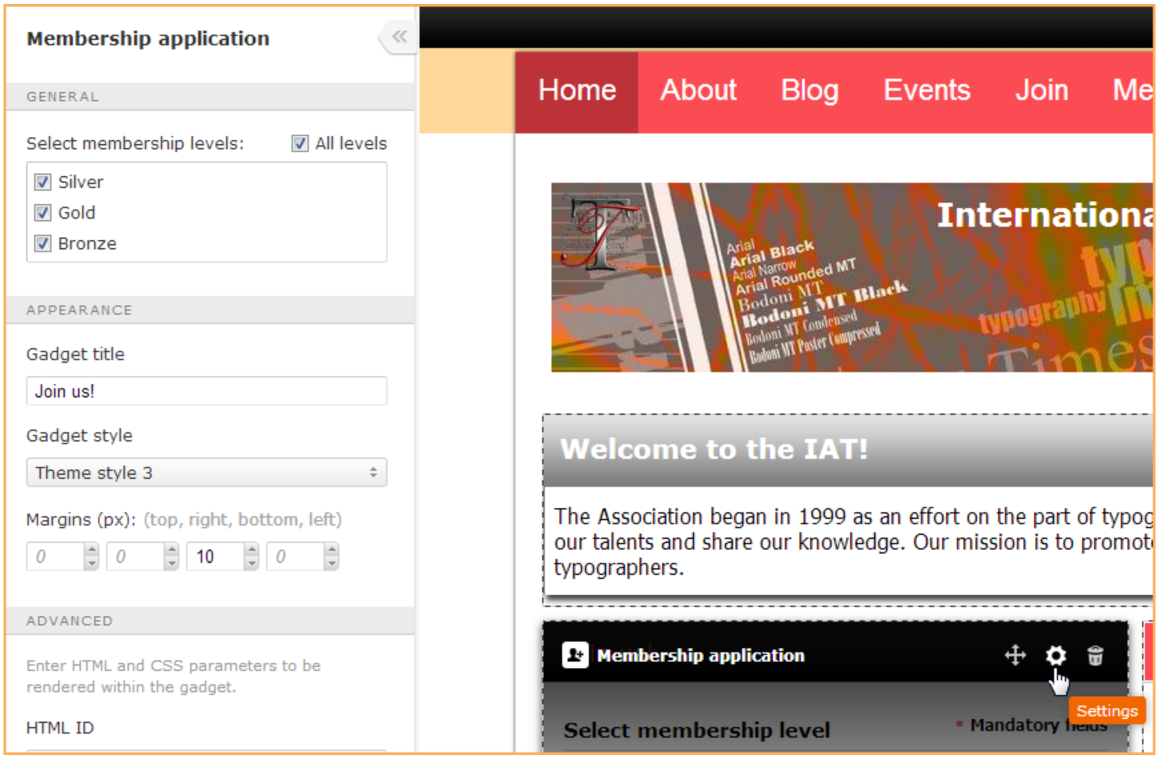
Read more/less

For an event calendar gadget, for example, you can control the type of events to be included, the section labels, and the text to be displayed if there are no events.

The appearance and behavior of gadgets also depend on the current website theme and can be further customized using theme overrides and CSS customization.

Gadget settings appear in a panel on the left side (which can be hidden to maximize the page design area).

To display the settings panel, you position your pointer over the gadget – while editing a site page or a page template – then click the gadget settings icon.



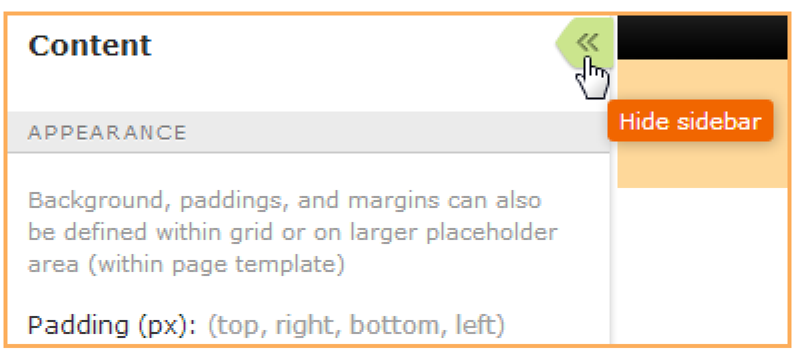
In some cases, the content of a dynamic gadget can be affected by settings other than the gadget settings. For example, whether events appear on an event calendar gadget depend on the event detail settings for each event. Where a dynamic gadget displays a form – such as a membership application gadget – the fields that appear on the form will be drawn from the fields in your Wild Apricot database. You can customize the content of these forms by adding, removing, and modifying the fields in your Wild Apricot database.

Dynamic gadgets can also be affected by the settings of other related gadgets. For example, the forum categories that are used to group multiple forums within a forum summary gadget are set within the forum gadget's settings.

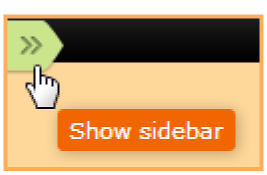
For some gadgets, the visibility of the data being displayed can be restricted to certain types of members. For all gadgets, access to the page on which the gadget appears can be controlled using the page settings.

Hiding the settings panel

To hide the settings panel, click the left chevron at the top of the panel.



To show the hidden panel, click the right chevron.



Common gadget settings

The gadget settings that are available depend on the gadget type, but a number of settings are available for most gadgets. These settings are described below.

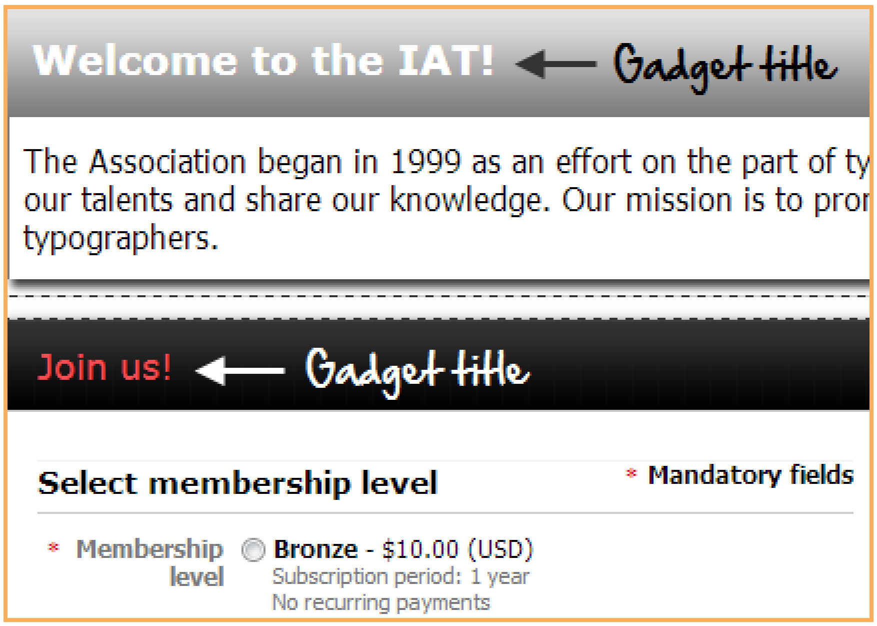
Margins

By setting margins, you control how much space – in pixels – appears outside the gadget. You can set top, bottom, left, and right margins separately.

> If you set vertical margins for adjoining gadgets, the margins will not be combined, but instead, the larger of the two margins will be applied. For example, if you set the bottom margin of the first gadget to 30 pixels and the second to 20, a margin of 30 pixels will separate the two gadgets.

Gadget title

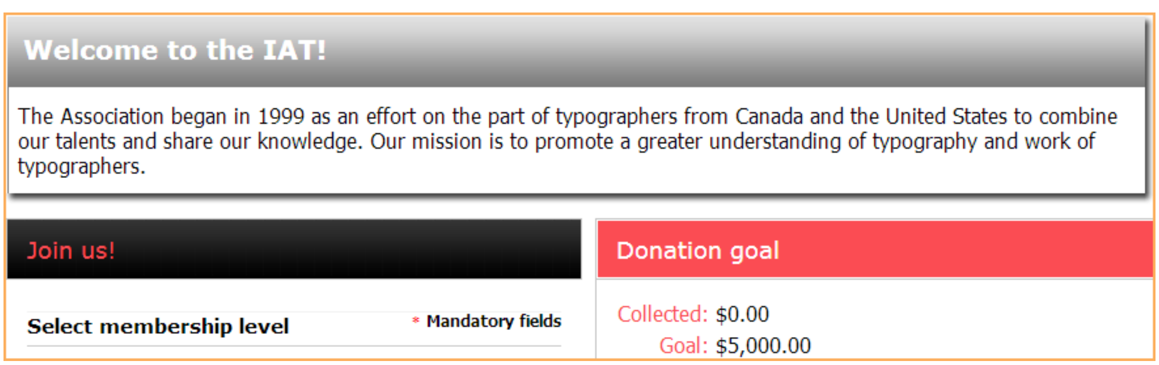
If you specify a gadget title, the title will appear specially formatted within the gadget. Depending on the gadget style you choose, the title may appear in a heading box.



> This setting is not available for all gadgets and themes.

Gadget style

The gadget style determines the physical appearance of the gadget. The style you choose will determine the color and format of the gadget title, the gadget content, and the gadget border.



You can choose from theme-specific styles and styles that are common to all themes.

This setting is not available for all gadgets and themes.

Advanced settings

Within the **Advanced** section, you can enter CSS code or classes to further control the appearance and behavior of a gadget. You can also use CSS in the same way to control the appearance of layouts and placeholders.

To display the advanced settings, click the triangle beside the **Advanced** heading.

The following advanced settings are available:

Option	Description
HTML ID	A unique identifier by which the gadget can be referenced within custom CSS or JavaScript code. The identifier is automatically generated but can be replaced with a more readable or memorable one (e.g. MyMemberApplicationGadget).

CSS class	The name of a CSS class defined on the CSS customization scre en. You could, for example, enter the name *myClass*, where code similar to the following has been entered on the CSS customization screen:
	`.myClass .artBoxTitle {`
	`  font-family: georgia;`
	`  text-shadow: 1px 2px 1px`
	`rgba(0,0,0,0.6);`
	`}`

Inline style	CSS code to control the behavior or appearance of the gadget. For example, you could enter *width: 250px;* to control the width of the gadget.

Controlling gadget dimensions

Normally, the width of a gadget depends on its content and the layout or placeholder in which it appears. For some gadgets, you can control the dimensions through their settings. For all gadgets, you can control the gadget width by entering the following code in the **Inlin e style** setting:

```
width: 250;
```

where the value of *250* can be replaced by whatever value you choose.

Moving a gadget

To move a gadget to a different location, position your pointer over the gadget – while editing a site page or a page template – then drag the Move icon to the new location.

Read more/less

You can move the gadget to an empty layout cell, or to a spot above or below a layout.

Deleting a gadget

To delete a gadget – while editing a site page or a page template – position your pointer over the gadget then click the Trash icon.

Read more/less

Deleted gadgets are **not** sent to the trash and cannot be restored from the trash.

Available gadgets

The following gadgets are available.

Read more/less

Category	Gadget	Description
Blogs	Blog	Blog to provide updates and information to your membership
	Recent blog posts	List of your most recent blog posts
Custom	Content	Text, graphics, links, and other custom content
	Custom HTML	Embed external widget or insert other custom HTML or JavaScript
	Headline	Title or headline for gadgets and sections
Donations	Donation form	Form that allows visitors to donate to your organization
	Donation goal	Progress bar that measures progress towards donation goal
Events	Event calendar	List or calendar of current and past events
	Upcoming events	List of upcoming events that links to event details
Forums	Discussion forum	Forum that allows members to post and reply to messages
	Forum summary	Summary of the activity in your forum(s)

	Forum updates	List of the most recent forum updates
Log in	Log in button	Log in button that links to an authentication page
	Log in form	Controls to log in or out, reset password, and view profile
Membership	Member directory	Searchable list of members that links to individual member profiles
	Membership application	Form to apply for membership in your organization
	Subscription form	Form that allows visitors to sign up to receive email blasts
Multimedia	Google map	Google map pinpointing specified location
	Photo album	Collection of pictures with thumbnail previews
	Slideshow	Rotating set of pictures
Navigational	Menu	Links to site pages grouped into menus
	Secondary menu	(*Blueprint, Bookshelf, Building Blocks, Fiesta, Firma, Homestead, Showcase, Skyline, Tinted Tiles, Terra, and Whiteboard themes*) Text links to internal or external pages
	Breadcrumbs	Current location within the menu hierarchy
	Navigation links	Text links to selected site pages
	Sitemap	Text links to all pages within site hierarchy
	Site search	Search Wild Apricot site pages, events, blog, forums, and member profiles
Social	Facebook page	Embed a Facebook page
	Facebook comments	Allow Facebook users to comment on your site page
	Sharing buttons	Buttons to share the page with social networks
	Social profile	Buttons that link to your profile on social networks

Singular gadgets

Some gadgets – called *singular gadgets* – cannot be combined with other singular gadgets on the same page, and are therefore not available when editing templates or system pages.

Read more/less

For example, you cannot combine an events calendar with a photo album on the same page.

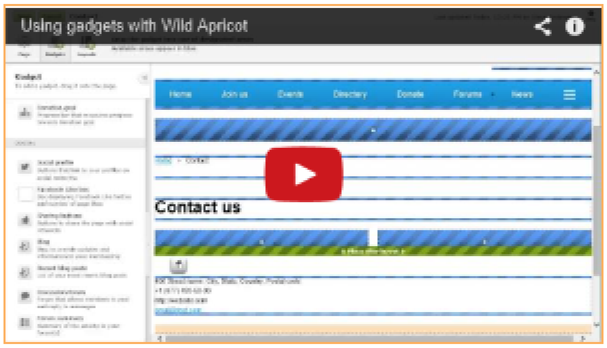
The following gadgets are singular gadgets:

- Blog
- Discussion forum
- Donation form
- Event calendar
- Forum summary

- Membership application
- Member directory
- Photo album
- Subscription form

What you can't do with gadgets

- You cannot insert a gadget into another gadget. For example, you cannot insert a Google map gadget into a content gadget.
- You cannot copy a gadget from one page or template to another, or within a page.
- You cannot undo changes to a gadget or its settings.
- You cannot restore a deleted gadget.



Using gadgets (5:03)

On this page:

Expand all sections

Blog gadgets

Blog gadgets

- Blog gadget
- Recent blog posts gadget

Blog gadget

Blog gadget

Using the blog gadget, you can add a blog to your Wild Apricot site to provide timely updates and information to your membership.

For instructions on inserting, moving, and deleting gadgets, see Gadgets.

> ⚠ You cannot add a blog gadget – or any other singular gadget – to a page template or system page, or to a page containing another singular gadget.

You can also display a list of the most recent blog posts to your site. For more information, see Recent blog posts gadget.

For more information on blogs, see Setting up and using blogs.

Adding a description

You can add a description for your blog by inserting a content gadget ahead of the blog gadget. Within the content gadget, you can add a title and description, and format them using text styles. For more information on adding and formatting text, see Using the content editor.

Blog gadget settings

Using the gadget's settings, you can control its appearance and behavior, including what kinds of visitors who can read, comment on, and add blog posts.

Read more/less

For instructions on displaying gadget settings, see Gadgets.

The following settings are available for blog gadgets:

Setting	Description
Blog name	The name used to identify the blog within the settings for the recent blog posts gadget.

<table>
<tr><td>Show RSS icon</td><td>Controls whether an RSS icon appears on your blog beside the blog title.


By clicking on the RSS icon, visitors to your site can subscribe and be automatically notified of updates to the blog in their RSS reader. If your blog appears on a page with restricted access, the RSS feed will not be accessible to your RSS reader.
If you're using Google Chrome, you may need to add a RSS subscription extension to your browser.</td></tr>
<tr><td>Show full post content</td><td>Controls whether the blog displays the complete content for each blog post, or just a short excerpt from each post. Below each excerpt would be a Read more link that the reader can click to view the full blog post. Alternatively, the reader could click the topic title.

</td></tr>
</table>

Access permissions	Controls what different kinds of visitors to the blog can do. You can set access permissions separately for public visitors, and for each membership level and member group. If you restrict permissions by both membership levels and member groups, then members will be granted the highest permission assigned to the levels and groups they belong to. You can choose from the following permission settings: – Read: Can read posts, but cannot comment on or add posts. – Read, comment: Can read posts and comment on them, but cannot add new posts. – Read, comment, add posts: Can read posts, comment on them, and add new posts. Public visitors (non-members) can never create new posts. Administrators in admin view can always view and comment on posts, modify and delete posts, and add new posts. In public view, administrators are subject to the same restrictions as others at the same membership level.
Margins	The amount of space – in pixels – that appears outside the gadget. You can set top, bottom, left, and right margins separately.
Padding	(*Kaleidoscope themes only*) The amount of space – in pixels – that appears between the content of the gadget and the outer limits of the gadget. You can set top, bottom, left, and right padding separately. If you have set a fixed height for the gadget, the bottom padding will be ignored.
Advanced	Within the **Advanced** section, you can enter CSS code or classes to further control the appearance and behavior of the gadget. For more information, see Advanced gadget settings.

Changing colors and fonts

You can change the colors, text styles, and backgrounds used in your website from the Colors and styles screen.

Read more/less

For more advanced fine-tuning, you can use CSS customization and theme overrides.

For blog gadgets, you can modify the following elements from the Colors and styles screen:

To change...	modify...	under...
Blog post title	Title H4, Link	Gadgets or Gadget styles (*Blueprint, Clean Lines, Dark Impact, Fiesta, Firma, Homestead, Showcase, Skyline, Terra, and White Space themes*) General formatting or Typography
Blog post author	Author Link	Blog (*Bookshelf, Building Blocks, Clean Lines, Dark Impact, Fiesta, Firma, Kaleidoscope, Homestead, Showcase, Skyline, Terra, Tinted Tiles, Whiteboard, and White Space themes*) General formatting or Typography

Blog post date and time	Date and time	Blog (*Bookshelf, Building Blocks, Clean Lines, Dark Impact, Fiesta, Firma, Homestead, Kaleidoscope, Showcase, Skyline, Terra, Tinted Tiles, Whiteboard, and White Space themes*)
Blog post content	Text/Normal	General formatting or Typography
Add post, Post, Add Comment, Cancel buttons	Normal/Hover	(*Clean Lines, Dark Impact, Fiesta, White Space themes*) Functional buttons
Read more, Comment, Edit, Delete links	Links Text/Normal Link	Blog (*Building Blocks, Firma, Kaleidoscope, Terra, Tinted Tiles themes*) General formatting or Typography
Icons used on mobile version	Icons	Blog (*Clean Lines, Dark Impact, Fiesta, Firma, Homestead, Skyline, Terra, and White Space themes*)

Any changes you make will be applied to other gadgets that use the same settings.

On this page:

- Adding a description
- Blog gadget settings
- Changing colors and fonts

Expand all sections

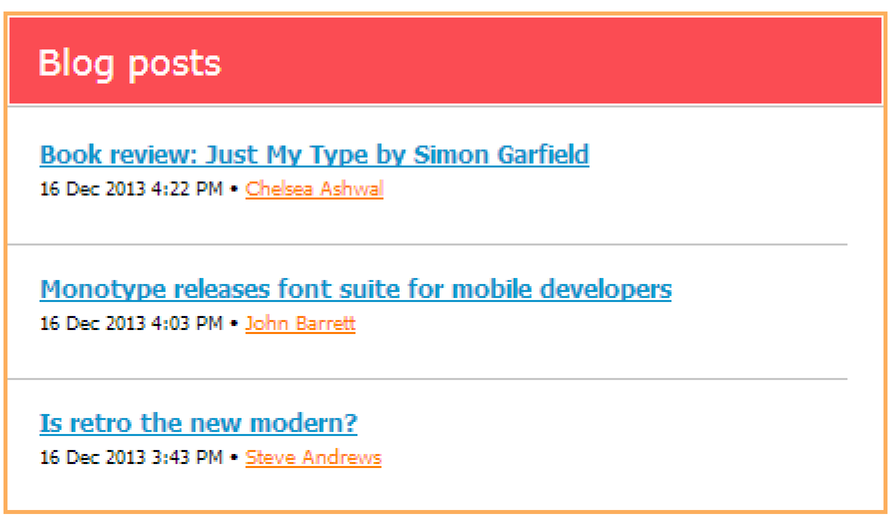
See also:

- How to insert a gadget
- Setting up and using blogs
- Recent blog posts gadget

Recent blog posts gadget

Recent blog posts gadget

Using this gadget, you can display a list of the most recent blog posts, with links to the full posts. The list will include the date of each post and the name of the poster – with the name linking to their profile if available.



Posts from multiple blogs will be combined into a single list.

You can insert a blog gadget into a page onto your site, or into a page template so that all pages that use that template will automatically display the gadget. For instructions on inserting, moving, and deleting gadgets, see Gadgets.

For more information on blogs, see Setting up and using blogs.

Recent blog posts gadget settings

Using the gadget's settings, you can control its appearance and content.

Read more/less

For instructions on displaying gadget settings, see Gadgets.

The following settings are available for recent blog posts gadgets:

Setting	Description
Show last *x* posts	Choose the number of recent blog posts that you want to display on the gadget.
Blogs to include	Choose the blogs to be included in the list. Blogs are identified using the blog name you entered as part of the blog gadget settings. If you check the **All blogs** option then all blogs – including any blogs added in the future – will be selected.
Text to show when there are no articles	Specify the text to be displayed when there are no blog posts to be listed.
Gadget title	If you specify a gadget title, the title will appear specially formatted within the gadget. Depending on the gadget style you choose, the title may appear in a heading box. For Kaleidoscope themes, use a Headline gadget instead of specifying a gadget title.
Gadget style	The gadget style determines the physical appearance of the gadget. The style you choose will determine the color and format of the gadget title, the gadget content, and the gadget border. You can choose from theme-specific styles and styles that are common to all themes. For Terra and Firma themes, the **Opacity 60%** style results in a semi-transparent gadget background.
Margins	The amount of space – in pixels – that appears outside the gadget. You can set top, bottom, left, and right margins separately.
Padding	(*Kaleidoscope themes only*) The amount of space – in pixels – that appears between the content of the gadget and the outer limits of the gadget. You can set top, bottom, left, and right padding separately. If you have set a fixed height for the gadget, the bottom padding will be ignored.
Advanced	Within the **Advanced** section, you can enter CSS code or classes to further control the appearance and behavior of the gadget. For more information, see Advanced gadget settings.

Changing colors and fonts

You can change the colors, text styles, and backgrounds used in your website from the Colors and styles screen.

Read more/less

For more advanced fine-tuning, you can use CSS customization and theme overrides.

For recent blog posts gadgets, you can modify the following elements from the Colors and styles screen:

To change...	modify...	under...

Gadget title	Title H4	Gadgets/Gadget styles (*Blueprint, Clean Lines, Dark Impact, Fiesta, Firma, Homestead, Showcase, Skyline, Terra, and White Space themes*) General formatting or Typography
Blog title/link	Text/Normal Link	General formatting or Typography
Author	Author	Blog (*Bookshelf, Building Blocks, Clean Lines, Dark Impact, Fiesta, Firma, Homestead, Kaleidoscope, Showcase, Skyline, Terra, Tinted Tiles, Whiteboard, and White Space themes*) Gadgets/Gadget styles (*for Blueprint, Homestead themes*)
Blog date	Date and time	Blog (*Bookshelf, Building Blocks, Clean Lines, Dark Impact, Fiesta, Firma, Homestead, Kaleidoscope, Showcase, Skyline, Terra, Tinted Tiles, Whiteboard, and White Space themes*) Gadgets/Gadget styles (*for Blueprint, Homestead themes*)

Any changes you make will be applied to other gadgets that use the same settings.

On this page:

- Recent blog posts gadget settings
- Changing colors and fonts

Expand all sections

See also:

- How to insert a gadget
- Setting up and using blogs

Custom gadgets

Custom gadgets

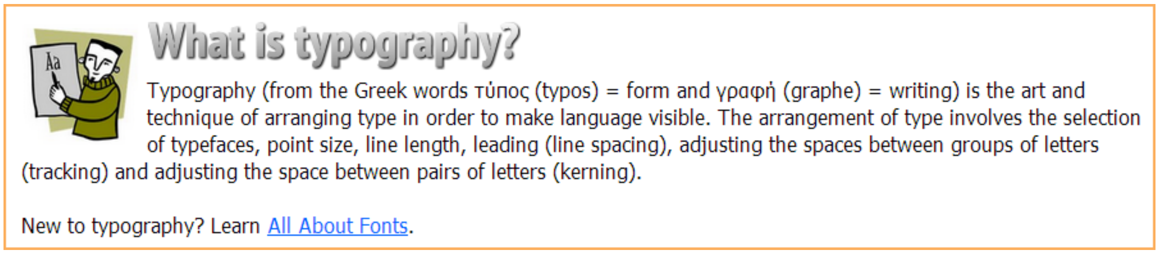
- Content gadget
- Custom HTML gadget
- Headline gadget

Content gadget

Content gadget

Content gadgets are the gadgets you use to add your own custom content. Within a content gadget, you can combine a variety of content, including:

- text
- pictures
- tables
- links
- dividers
- custom HTML or JavaScript



You can format the text, using localized formatting or text styles, or use ArtText to create stylized text with special effects such as drop shadows.

You can link text and pictures to a page on your site or another site, and provide links to documents stored in your account or on another site.

You can layer and overlap content so that text can appear on top of a picture, for example. For this reason, content gadgets are perfect for creating page headers. You can also choose a background color or image for each content gadget.

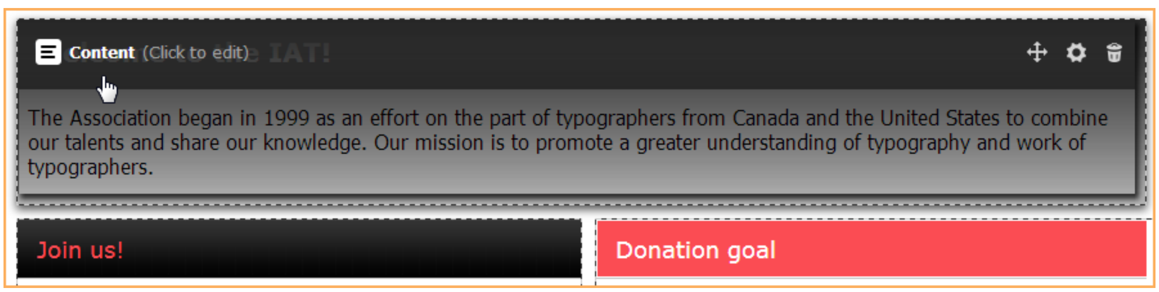
You can insert a content gadget into a page onto your site, or into a page template so that all pages that use that template will automatically display the gadget. For instructions on inserting, moving, and deleting gadgets, see Gadgets.

> For Kaleidoscope themes, you can insert a headline gadget – a specialized content gadget – above a content gadget to act as its title or heading.

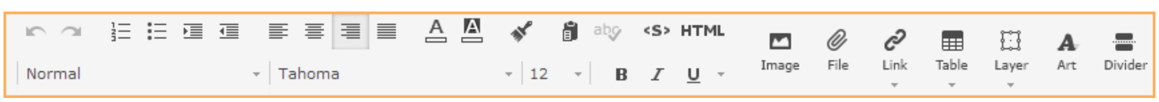
Editing the content

To edit the content of a content gadget while editing a site page or page template, position your pointer over the gadget then click anywhere within the gadget.

Read more/less



Once you have opened the gadget for editing, you can use the options appearing on the content editor toolbar to add or modify text, picture, tables, links, HTML or JavaScript, as well as other content.



Content gadget settings

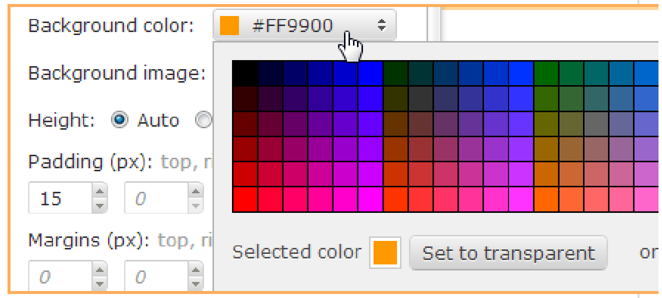
Using a content gadget's settings, you can control its appearance, including its height, margins, background, and overall style.

Read more/less

For instructions on displaying gadget settings, see Gadgets.

The following settings are available for content gadgets:

Setting	Description

<table>
<tr>
<td>Background color</td>
<td>
The background color of the content area. To change the currently selected color, click it then click another color from the palette or enter the hex code for the color. To make the background transparent, so that the page background shows through, click the Set to transparent button.


If you choose a gadget style (below) that is not transparent, you may no longer see your background color. You can also set the background color for the layout or placeholder in which the gadget appears.
</td>
</tr>
<tr>
<td>Background image</td>
<td>
An image to be displayed as the background for the gadget. To choose a background image, click the Select button, or the Chan ge button if a background image has already been applied. From the dialog that appears, you can choose from images in your theme's library, or images from your account. After you have selected the background image, click Apply background to apply it.
After you have applied a background image, you can control the horizontal and vertical alignment, and choose how your image appears within the available space. You can choose from the following Behavior options:
<table>
<tr><th>Option</th><th>Description</th><th></th></tr>
<tr><td>Tile</td><td>The image will be repeated horizontally and vertically to completely fill the available space.</td><td></td></tr>
<tr><td>No repeat or scaling</td><td>The image will displayed as is, and will be not be repeated or scaled.</td><td></td></tr>
<tr><td>Repeat horizontally</td><td>The image will be repeated horizontally to fill the width of the available space.</td><td></td></tr>
</table>
</td>
</tr>
</table>

Repeat vertically	The image will be repeated vertically to fill the height of the available space.	
Fill	The image will be stretched to completely fill the available space, and may therefore appear distorted.	
Cover	The image will be proportionally resized to cover the available space, and may therefore be cropped.	
Scale by height	The image will be proportionally resized to fit the height of the available space. Depending on the dimensions of the space, the image may be cropped, or may not fill the entire width of the space.	
Scale by width	The image will be proportionally resized to fit the width of the available space. Depending on the dimensions of the space, the image may be cropped, or may not fill the entire height of the space.	

To remove the existing background image, click the **Remove** link .

If you apply both a background color and a background image, the background image will appear on top of the background color. If you choose a gadget style (below) that is not transparent, you may no longer see your background image. You can also set the background image for the layout or placeholder in which the gadget appears.

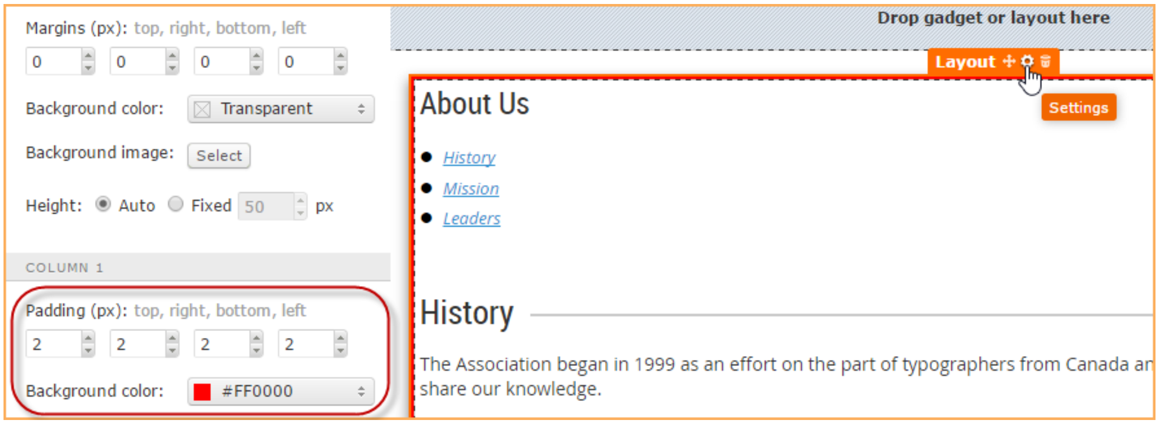
Height	The height of the gadget. You can allow the height to be automatically set based on the content of the gadget or set it yourself to a fixed number of pixels. If you have added a background image, you can click **Adjust height to background image** to automatically adjust the height of the gadget to the height of the image.
Padding	The amount of space – in pixels – that appears between the content of the gadget and the outer limits of the gadget. You can set top, bottom, left, and right padding separately. If you have set a fixed height for the gadget, the bottom padding will be ignored. If you have specified a gadget title, the top padding will be applied between the title and the rest of the content.
Margins	The amount of space – in pixels – that appears outside the gadget. You can set top, bottom, left, and right margins separately.
Hide pictures in mobile view	(*Terra and Firma themes*) With this option enabled, pictures inserted within the content gadget are not displayed when the width of the browser window is 600 pixels or less. Background images will, however, continued to be displayed regardless of the browser window width.
Gadget title	If you specify a gadget title, the title will appear specially formatted within the gadget. Depending on the gadget style you choose, the title may appear in a heading box. ⚠ For Kaleidoscope themes, use a Headline gadget inste ad of specifying a gadget title.
Gadget style	The gadget style determines the physical appearance of the gadget. The style you choose will determine the color and format of the gadget title, the gadget content, and the gadget border. You can choose from theme-specific styles and styles that are common to all themes. Depending on whether the gadget style you choose is transparent, you may no longer see your background color and background image. For Terra and Firma themes, the **Opacity 60%** style results in a semi-transparent gadget background.
Advanced	Within the **Advanced** section, you can enter CSS code or classes to further control the appearance and behavior of the gadget. For more information, see Advanced gadget settings.

Placing a border around a content gadget

To place a border around a content gadget, follow these steps:

Read more/less

1. Place your content gadget in a layout, if it doesn't already appear in one. Use a one-column layout if your content gadget occupies the full width of the content area.
2. Hover over the layout and click the Settings icon.
3. From the layout's settings, specify as the background color for column in which the content gadget appears to the color you want to use for the border.
4. Set the **Padding** values to the width you want for the border.



5. Go to the settings for the content gadget and set the background color to something other than transparent (like white, for example).
6. Save your changes.

Some themes come with content gadget styles that display borders, with or without a heading block. You can select one of these styles within the Gadget style dropdown within the Settings panel for the content gadget.

On this page:

Expand all sections

See also:

- How to insert a gadget
- Inserting pictures
- Inserting links
- Inserting documents and files
- Using the content editor
- Headline gadget

Custom HTML gadget

Custom HTML gadget

Using this gadget, you can insert custom HTML or JavaScript code into a page or template. You might want to insert code to embed an audio or video clip , or to embed a third-party widget from Google or Twitter.

> You can also add custom HTML or JavaScript code to content gadgets using the Snippet function. For more information, see Inserting and modifying HTML or JavaScript.

You can insert the gadget into a page on your site, or into a page template so that all pages that use that template will automatically display the gadget. For instructions on inserting, moving, and deleting gadgets, see Gadgets.

If your custom code includes references to third-party code – code stored on another website such as Facebook – you will not be able to preview it in edit mode. To view the gadget in action, you must save any changes to the page.

Inserting your code

To insert code in a custom HTML gadget, click the **Edit code** button within the gadget's settings panel. You can enter up to 2,048,000 characters of code. Make sure your code does not violate any of the code restrictions (below).

Custom HTML gadget settings

After you have inserted the custom HTML gadget, you can use its settings to enter the code and control its appearance.

Read more/less

For instructions on displaying gadget settings, see Gadgets.

The following settings are available for custom HTML gadgets:

Setting	Description
Edit code	Click this button to display a dialog where you can enter the HTML or JavaScript code. You can enter up to 2,048,000 characters of code. Make sure your code does not violate any of the code restrictions (below).
Gadget title	If you specify a gadget title, the title will appear specially formatted within the gadget. Depending on the gadget style you choose, the title may appear in a heading box. If you want to add a description under the title, do not enter a gadget title, but instead, create a content gadget with a title and description, and place the content gadget ahead of this gadget. For Kaleidoscope themes, use a Headline gadget instead of specifying a gadget title.
Gadget style	The gadget style determines the physical appearance of the gadget. The style you choose will determine the color and format of the gadget title, the gadget content, and the gadget border. You can choose from theme-specific styles and styles that are common to all themes.
Margins	The amount of space – in pixels – that appears outside the gadget. You can set top, bottom, left, and right margins separately.
Padding	(*Kaleidoscope themes only*) The amount of space – in pixels – that appears between the content of the gadget and the outer limits of the gadget. You can set top, bottom, left, and right padding separately. If you have set a fixed height for the gadget, the bottom padding will be ignored.
Advanced	Within the **Advanced** section, you can enter CSS code or classes to further control the appearance and behavior of the gadget. For more information, see Advanced gadget settings.

Code restrictions

Do **not** include any of the following commands within your custom code, since they can conflict with our code and cause the system to hang:

- document.write()
- document.writeln()
- document.open()
- object.write()
- object.writeln()
- object.open()

where *object* is the name of a target object.

On this page:

Expand all sections

See also:

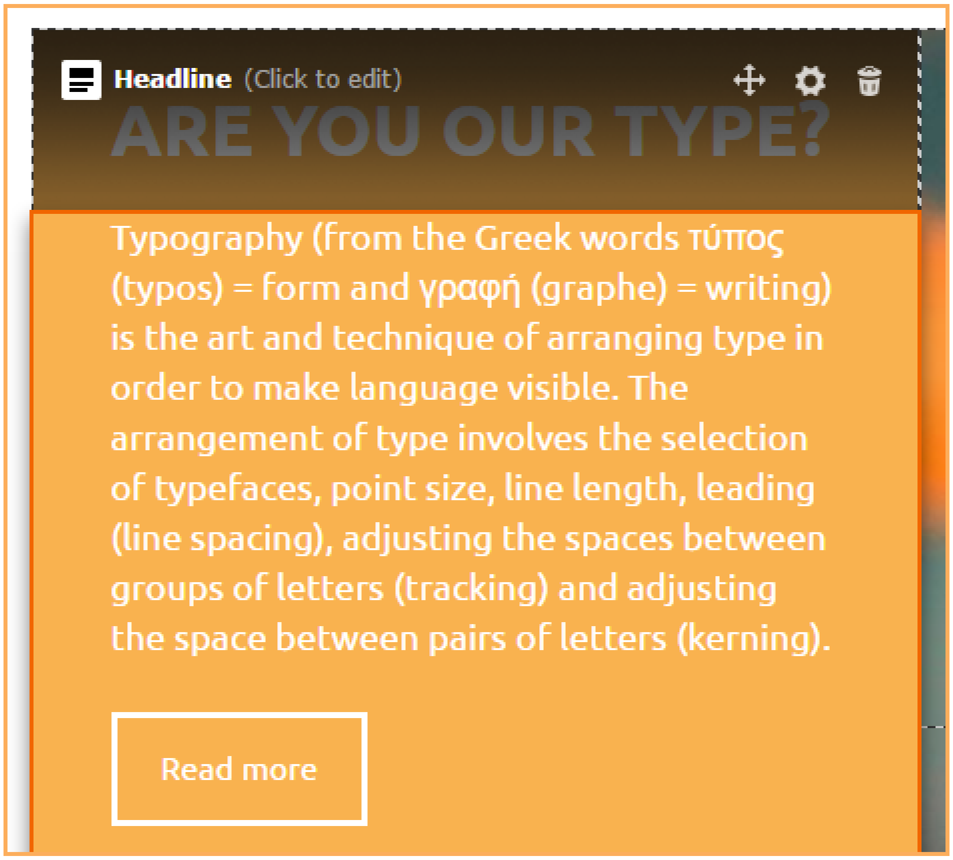
- How to insert a gadget

Headline gadget

Headline gadget

⚠ This gadget is only available when using a Kaleidoscope website theme.

Headline gadgets are specialized content gadgets used to display titles and headings for other gadgets or page sections.



You can insert a headline gadget above a content gadget or other gadget to act as its title or heading.

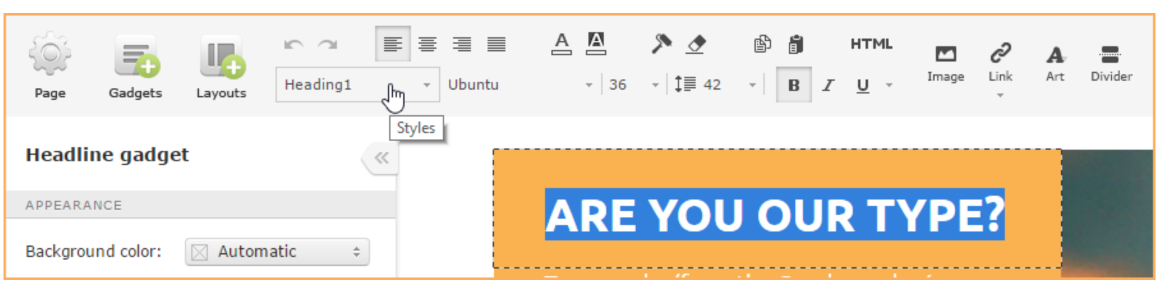
If you want your headline gadget to appear as a seamless part of the gadget below it, you can add both gadgets to the same layout cell and set the cell background to a particular color.

For instructions on inserting, moving, and deleting gadgets, see Gadgets.

Formatting the text

The headline gadget includes gadget styles to automatically format the text for light or dark backgrounds. Whatever style you choose, you can format the text yourself using the content editor toolbar.

Read more/less



You can format the text using localized formatting or paragraph styles, or use ArtText to create stylized text with special effects such as drop shadows.

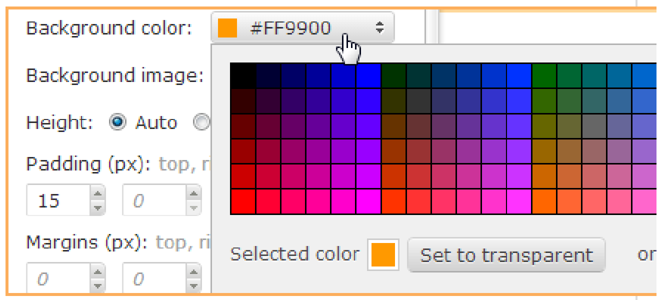
Headline gadget settings

Using a headline gadget's settings, you can control its appearance, including its height, margins, padding, background, and overall style.

Read more/less

For instructions on displaying gadget settings, see Gadgets.

The following settings are available for headline gadgets:

<table>
<tr><th>Setting</th><th>Description</th></tr>
<tr><td>Background color</td><td>The background color of the gadget. To change the currently selected color, click it then click another color from the palette or enter the hex code for the color. To make the background transparent, so that the page background shows through, click the Set to transparent button.


If you choose a gadget style (below) that is not transparent, you may no longer see your background color. You can also set the background color for the layout or placeholder in which the gadget appears.</td></tr>
<tr><td>Background image</td><td>An image to be displayed as the background for the gadget. To choose a background image, click the Select button, or the Chan ge button if a background image has already been applied. From the dialog that appears, you can choose from images in your theme's library, or images from your account. After you have selected the background image, click Apply background to apply it.

After you have applied a background image, you can control the horizontal and vertical alignment, and choose how your image appears within the available space. You can choose from the following Behavior options:
<table><tr><th>Option</th><th>Description</th><th></th></tr><tr><td>Tile</td><td>The image will be repeated horizontally and vertically to completely fill the available space.</td><td></td></tr></table></td></tr>
</table>

No repeat or scaling	The image will displayed as is, and will be not be repeated or scaled.	
Repeat horizontally	The image will be repeated horizontally to fill the width of the available space.	
Repeat vertically	The image will be repeated vertically to fill the height of the available space.	
Fill	The image will be stretched to completely fill the available space, and may therefore appear distorted.	
Cover	The image will be proportionally resized to cover the available space, and may therefore be cropped.	
Scale by height	The image will be proportionally resized to fit the height of the available space. Depending on the dimensions of the space, the image may be cropped, or may not fill the entire width of the space.	
Scale by width	The image will be proportionally resized to fit the width of the available space. Depending on the dimensions of the space, the image may be cropped, or may not fill the entire height of the space.	

To remove the existing background image, click the **Remove** link .

	If you apply both a background color and a background image, the background image will appear on top of the background color. If you choose a gadget style (below) that is not transparent, you may no longer see your background image. You can also set the background image for the layout or placeholder in which the gadget appears.
Height	The height of the gadget. You can allow the height to be automatically set based on the content of the gadget or set it yourself to a fixed number of pixels. If you have added a background image, you can click **Adjust height to background image** to automatically adjust the height of the gadget to the height of the image.
Margins	The amount of space – in pixels – that appears outside the gadget. You can set top, bottom, left, and right margins separately.
Padding	The amount of space – in pixels – that appears between the content of the gadget and the outer limits of the gadget. You can set top, bottom, left, and right padding separately. If you have set a fixed height for the gadget, the bottom padding will be ignored.
Gadget style	The gadget style determines the physical appearance of the gadget. The style you choose will determine the color and format of the gadget title, the gadget content, and the gadget border. Styles are available to automatically format the text for light or dark backgrounds. Depending on whether the gadget style you choose is transparent, you may no longer see your background color and background image.
Advanced	Within the **Advanced** section, you can enter CSS code or classes to further control the appearance and behavior of the gadget. For more information, see Advanced gadget settings.

On this page:

- Formatting the text
- Headline gadget settings

Expand all sections

See also:

- How to insert a gadget
- Inserting pictures
- Inserting links
- Inserting documents and files
- Using the content editor

Donation gadgets

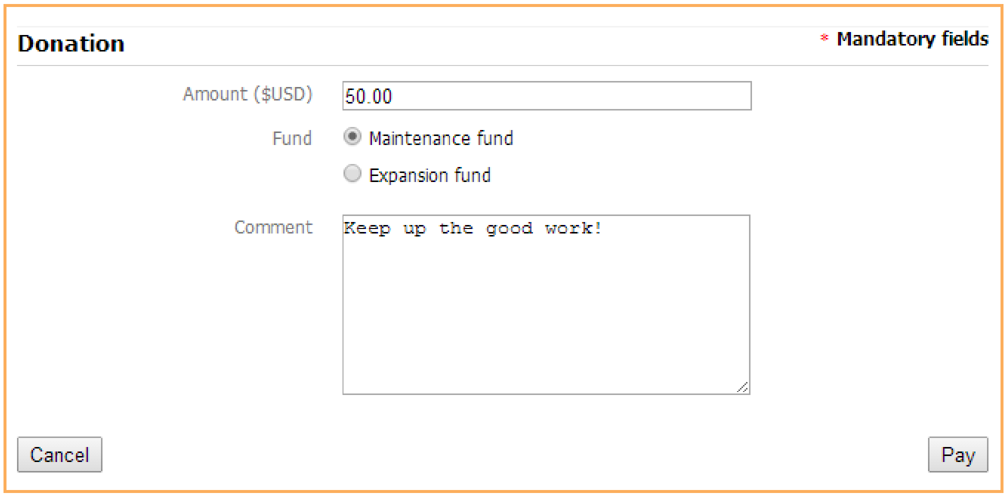
Donation gadgets

- Donation form gadget
- Donation goal gadget

Donation form gadget

Donation form gadget

So that visitors to your site can donate to your organization, you can add a donation form that integrates with your payment system and contact database.



You can choose the donation fields you want displayed on the donation form as part of the settings for the donation form gadget. One of your donation fields is the **Amount** field, a system field that cannot be renamed, deleted, or excluded from the donation form.

If the visitor viewing the donation form is not logged in, common fields will appear on the form as well. You can choose the common fields you want to appear on the form as part of the donation form gadget settings, but you cannot exclude the **Email** field. For more information on setting up and using donation forms, see Donation forms.

To enable online donations, you need to set up online payments.

To track the success of your fundraising efforts, you can add a donation goal gadget to a page on your site. You can also embed a Wild Apricot donation form on another website using widgets.

For instructions on inserting, moving, and deleting gadgets, see Gadgets.

> ⚠ You cannot add a donation form gadget – or any other singular gadget – to a page template or system page, or to a page containing another singular gadget.

Adding a description

You can add a description to your donation form by inserting a content gadget ahead of the donation form gadget. Within the content gadget, you can add a title and description, and format them using text styles. For more information on adding and formatting text, see Using the content editor.

Donation form gadget settings

Using the gadget's settings, you can control its appearance and content.

Read more/less

For instructions on displaying gadget settings, see Gadgets.

The following settings are available for donation form gadgets:

Setting	Description
Common fields to include	Select the common fields to be included on the donation form. The Email field is automatically included and cannot be excluded.
Donation fields to include	Select the donation fields to be included on the donation form. The Amount field is automatically included and cannot be excluded.
Margins	The amount of space – in pixels – that appears outside the gadget. You can set top, bottom, left, and right margins separately.

Padding	(*Kaleidoscope themes only*) The amount of space – in pixels – that appears between the content of the gadget and the outer limits of the gadget. You can set top, bottom, left, and right padding separately. If you have set a fixed height for the gadget, the bottom padding will be ignored.
Advanced	Within the **Advanced** section, you can enter CSS code or classes to further control the appearance and behavior of the gadget. For more information, see Advanced gadget settings.

Changing colors and fonts

You can change the colors, text styles, and backgrounds used in your website from the Colors and styles screen.

Read more/less

For more advanced fine-tuning, you can use CSS customization and theme overrides.

For donation form gadgets, you can modify the following elements from the Colors and styles screen:

To change...	modify...	under...
"Donations"	Text/Normal H3 Form instructions	General formatting or Typography General formatting > Form (*Bookshelf, Building Blocks, Clean Lines, Dark Impact, Fiesta, Firma, Homestead, Kaleidoscope, Showcase, Skyline, Terra, Tinted Tiles, Whiteboard, White Space only*)
"Mandatory fields"	Text/Normal Form instructions	General formatting or Typography General formatting > Form (Bookshelf, Building Blocks, Clean Lines, Dark Impact, Fiesta, Firma, Homestead, Kaleidoscope, Showcase, Skyline, Terra, Tinted Tiles, Whiteboard, White Space only)
Labels	Text/Normal Labels	General formatting or Typography General formatting > Form
Options	Text/Normal Option title	General formatting or Typography General formatting > Form
Pay, Cancel buttons	Normal/Hover	Functional buttons (*Clean Lines, Dark Impact, Fiesta, White Space themes*)

Any changes you make will be applied to other gadgets that use the same settings.

On this page:

Expand all sections

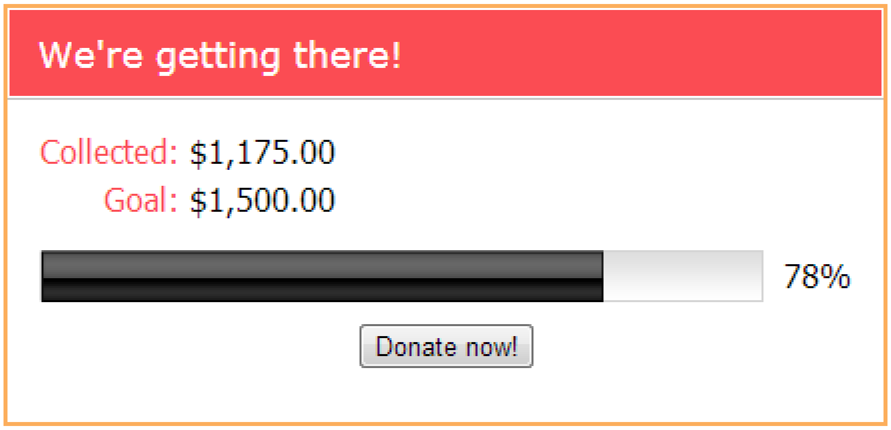
See also:

- How to insert a gadget
- Managing donations
- Personalized fundraiser pages

Donation goal gadget

Donation goal gadget

To track your fundraising efforts, you can add a donation goal to a page on your site. The donation goal gadget displays a progress bar that measures progress towards your financial goal.



You can insert the gadget into a page onto your site, or into a page template so that all pages that use that template will automatically display the gadget. For instructions on inserting, moving, and deleting gadgets, see Gadgets.

For more information on donations, see Managing donations.

Donation goal gadget settings

Using the gadget's settings, you can control its appearance and behavior.

Read more/less

For instructions on displaying gadget settings, see Gadgets.

The following settings are available for donation goal gadgets:

Setting	Description
Goal	The donation goal you are trying to reach. The currency used here is the one selected on the Payment settings screen.
Donation page to link to	Displays a donate button that links to the page you select. You can only choose pages that include a donation form gadget. If you don't want a donate button to appear, select **None**.
Include in Collected	Choose whether to display all donations or filter the donations by a particular donation field. You may be running multiple fundraising campaigns and need to display a separate progress indicator for each campaign. If you want to filter the donations, you can select any donation field whose type is multiple choice, radio buttons, or dropdown. After you select a donation field, you select a value for that field. For example, if you use a donation field called Fund to allow donors to direct their donations to different funds, you could select the Fund field then choose among possible field values such as Building or Maintenance.
Filter by date	If you want to filter donations by date, choose the start and end dates of the donations you want to include.
Gadget title	If you specify a gadget title, the title will appear specially formatted within the gadget. Depending on the gadget style you choose, the title may appear in a heading box. For Kaleidoscope themes, use a Headline gadget instead of specifying a gadget title.
Description	A brief description of your fundraising campaign.

Button label	The label that appears on the donate button. The button only appears if you choose a **Donation page to link to** (above).
Gadget style	The gadget style determines the physical appearance of the gadget. The style you choose will determine the color and format of the gadget title, the gadget content, and the gadget border. You can choose from theme-specific styles and styles that are common to all themes.
Margins	The amount of space – in pixels – that appears outside the gadget. You can set top, bottom, left, and right margins separately.
Padding	(*Kaleidoscope themes only*) The amount of space – in pixels – that appears between the content of the gadget and the outer limits of the gadget. You can set top, bottom, left, and right padding separately. If you have set a fixed height for the gadget, the bottom padding will be ignored.
Advanced	Within the **Advanced** section, you can enter CSS code or classes to further control the appearance and behavior of the gadget. For more information, see Advanced gadget settings.

Changing colors and fonts

You can change the colors, text styles, and backgrounds used in your website from the Colors and styles screen.

Read more/less

For more advanced fine-tuning, you can use CSS customization and theme overrides.

For donation goal gadgets, you can modify the following elements from the Colors and styles screen:

To change...	modify...	under...
Gadget title	H4 Title	General formatting or Typography Gadgets/Gadget styles (*Blueprint, Fiesta, Firma, Homestead, Showcase, Skyline, and Terra themes*)
Gadget background	Background	Gadgets (*Showcase, Skyline themes*)
Progress bar fill color	Donation bar	Gadgets/Gadget styles (*Blueprint, Fiesta, Homestead, and Skyline themes*) Donation goal (*Building Blocks, Clean Lines, Dark Impact, Firma, Kaleidoscope, Showcase, Terra, Tinted Tiles, White Space themes*)
Progress bar background	Donation bar (back)ground	Gadgets/Gadget styles (*Blueprint, Fiesta, Homestead, Skyline themes*) Donation goal (*Building Blocks, Clean Lines, Dark Impact, Firma, Kaleidoscope, Showcase, Terra, Tinted Tiles, White Space themes*)
Progress bar outline	Donation bar border color	Donation goal (*Building Blocks, Firma, Kaleidoscope, Showcase, Terra, Tinted Tiles*)
Progress bar percentage	Donation bar percentage	Donation goal (*Building Blocks, Firma, Kaleidoscope, Showcase, Terra, Tinted Tiles*)

"Goal, "Collected" labels	Donation labels Text/Normal	Gadgets (*Homestead, Skyline themes*) General formatting or Typography (*all other themes*)
"Goal" value	Donation labels Donation goal Text/Normal	Donation goal (*Building Blocks, Firma, Kaleidoscope, Terra, Tinted Tiles*) Gadgets (*Homestead, Skyline themes*) General formatting or Typography (*all other themes*)
"Collected value"	Donation labels Donation collected Text/Normal	Donation goal (*Building Blocks, Firma, Kaleidoscope, Showcase, Terra, Tinted Tiles*) Gadgets (*Homestead, Skyline themes*) General formatting or Typography (*all other themes*)
Description	Donation description Text/Normal	Gadgets (*Homestead, Skyline themes*), Donation goal (*Building Blocks, Firma, Kaleidoscope, Showcase, Terra, Tinted Tiles*) General formatting or Typography (*all other themes*)
Donate button	Donation button	Gadgets (*Homestead, Skyline themes*) Donation goal (*Building Blocks, Firma, Kaleidoscope, Showcase, Terra, Tinted Tiles*)

Any changes you make will be applied to other gadgets that use the same settings.

On this page:

Expand all sections

See also:

- How to insert a gadget
- Donation form gadget

Event gadgets

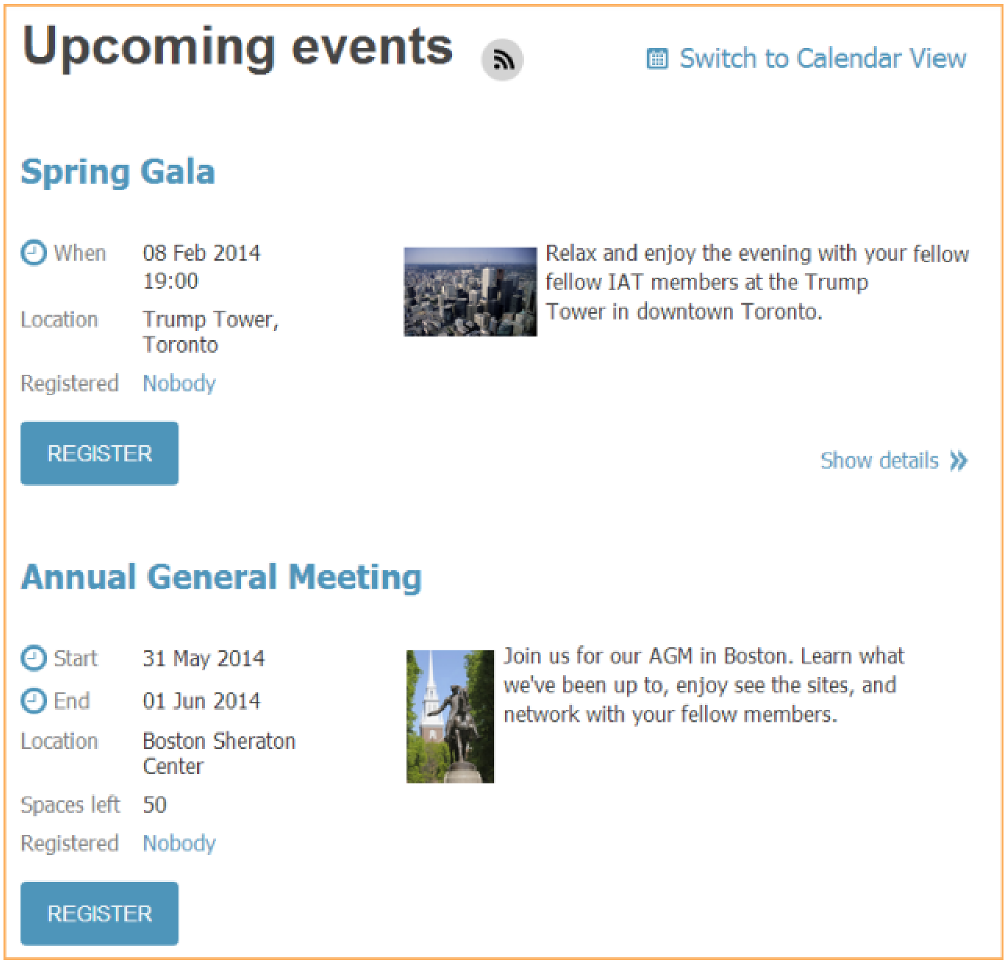
Event gadgets

- Event calendar gadget
- Upcoming events gadget

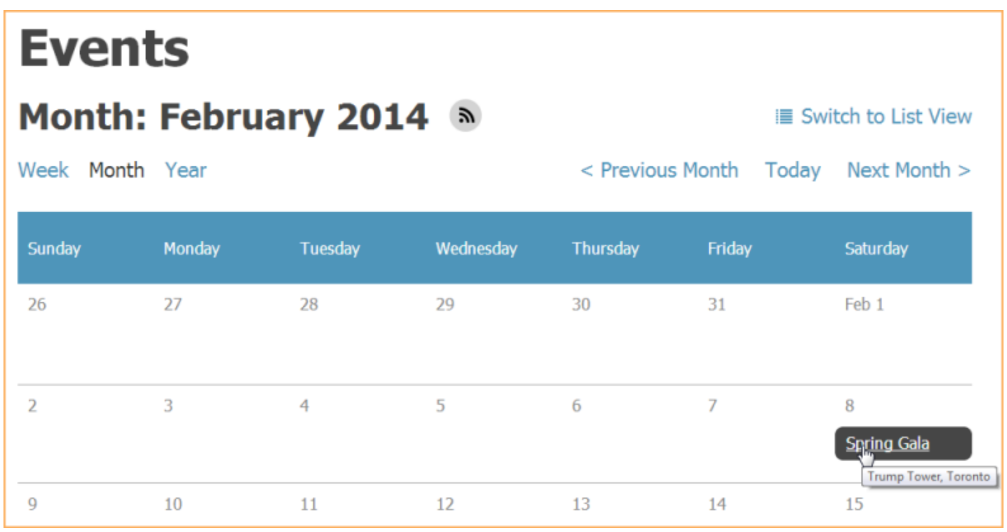
Event calendar gadget

Event calendar gadget

So that visitors to your site can see your events and register for them, you can add an event calendar gadget to a page on your website. Events can be displayed in list view...



...or in calendar view.



You can set up multiple event calendars, each displaying a different set of events (e.g. training vs. social events).

Unlike an upcoming events gadget that lists only a limited number of upcoming events, the event calendar gadget can display all events, including past ones.

Whether an event appears on the calendar depends on the event visibility and access restrictions set as part of the event settings.

For instructions on inserting, moving, and deleting gadgets, see Gadgets.

⚠ You cannot add an event calendar gadget – or any other singular gadget – to a page template or system page, or to a page containing another singular gadget.

For more information on setting up and using event calendars, see Publishing your event calendar.

Adding a title and description

You can add a title and description for your event calendar by inserting a content gadget ahead of the event calendar gadget. Within the content gadget, you can format the title and description using text styles. For more information, see Using the content editor.

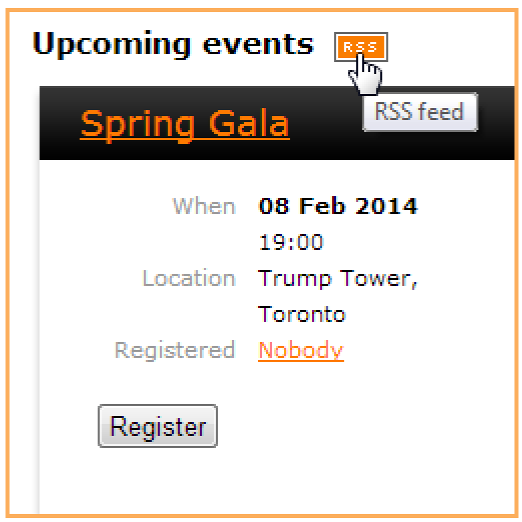
Event calendar gadget settings

Using the gadget's settings, you can control its appearance and content. Among other things, you can choose which types of events are displayed, and which types of visitors can view the event calendar.

Read more/less

For instructions on displaying gadget settings, see Gadgets.

The following settings are available for event calendar gadgets:

Setting	Description
Filter events by	You can filter the event calendar so that it displays only events with certain event tags. To filter the calendar, check only those event tags you want to include in the event calendar.
Show past events	Controls whether the calendar displays past events as well as upcoming events.
Show restricted events to public users	Choose whether to show events with restricted access to public visitors – those who are not signed in as members or administrators.
Show RSS icon	Controls whether an RSS icon appears on the event calendar beside each section title.  By clicking on the RSS icon, visitors to your site can subscribe and be automatically notified of updates to the calendar in their RSS reader. If your event calendar appears on a page with restricted access, the RSS feed will not be accessible to your RSS reader. If you're using Google Chrome, you may need to add a RSS subscription extension to your browser.

Default view	Controls whether the events are initially displayed within a list or within a calendar. Regardless of your choice, visitors can switch between list view and calendar view.
Calendar scale	If you choose **Calendar** as the default view, you can choose whether the calendar displays the current week, month, or year.
Week starts on	If you choose **Calendar** as the default view, you can decide whether the week begins on Sunday or Monday.
Upcoming events section title	The heading for the upcoming events section (appears in list view only).
Past events section title	The heading for the past events section (appears in list view only).
Text to show when there are no events	Specify the text to be displayed if there are no events to display (appears in list view only).
Margins	The amount of space – in pixels – that appears outside the gadget. You can set top, bottom, left, and right margins separately.
Padding	(*Kaleidoscope themes only*) The amount of space – in pixels – that appears between the content of the gadget and the outer limits of the gadget. You can set top, bottom, left, and right padding separately. If you have set a fixed height for the gadget, the bottom padding will be ignored.
Advanced	Within the **Advanced** section, you can enter CSS code or classes to further control the appearance and behavior of the gadget. For more information, see Advanced gadget settings.

Changing colors and fonts

You can change the colors, text styles, and backgrounds used in your website from the Colors and styles screen.

Read more/less

For more advanced fine-tuning, you can use CSS customization and theme overrides.

For event calendar gadgets, you can modify the following elements from the Colors and styles screen:

To change...	modify...	under...
Section headings	H3 Event calendar title Title	General formatting or Typography Typography (*Bookshelf, Clean Lines, Dark Impact, Fiesta, Firma, Homestead, Showcase, Skyline, Terra, Treehouse, Whiteboard, and White Space themes*) Event calendar (*Building Blocks, Tinted Tiles themes*)
"Registration" on event details page	H4	General formatting or Typography
"Switch to Calendar/List View"	Text/Normal Link	General formatting or Typography
Event name	H4 Link	General formatting or Typography
Event details	Text/Normal	General formatting or Typography
Event description	Text/Normal Info box	General formatting or Typography General formatting (*for Blueprint, Business Casual, and Granite themes*)

"Already registered", "Show details"	Text/Normal Link Info box	General formatting or Typography General formatting or Typography General formatting (*for Blueprint, Business Casual, and Granite themes*)
Background color of event detail area	Colored box >> Info box	General formatting (*for Aurora, Glass, Keynote, Memo, Nature, and Notebook themes*)
Background color of event registration form	Form >> Background color	General formatting (*for Aurora, Glass, Keynote, Memo, Nature, and Notebook themes*)
Register button	Normal/Hover	Functional buttons (*Clean Lines, Dark Impact, Fiesta, White Space themes*)

Any changes you make will be applied to other gadgets that use the same settings.

On this page:

- Adding a title and description
- Event calendar gadget settings
- Changing colors and fonts

Expand all sections

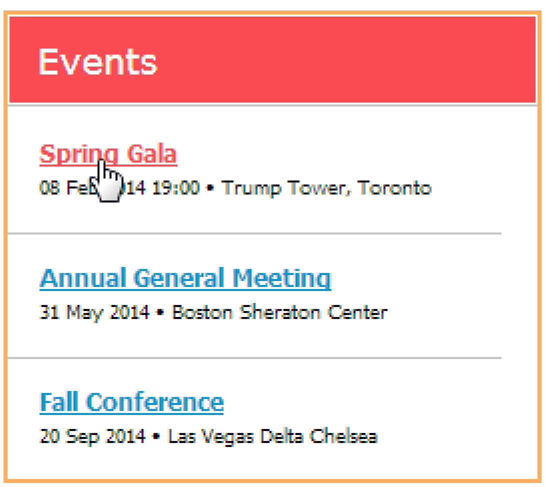
See also:

- How to insert a gadget
- Upcoming events gadget
- Setting up events

Upcoming events gadget

Upcoming events gadget

Using the upcoming events gadget, you add a clickable list of upcoming events , with each event linking to a detailed description of the event.



Unlike an event calendar gadget that can display all events, including past ones, the upcoming event gadget displays only a limited number of upcoming events.

Whether an event appears in the list depends on the event visibility and access restrictions set as part of the event settings.

You can insert the upcoming events gadget into a page onto your site, or into a page template so that all pages that use that template will automatically display the gadget. For instructions on inserting, moving, and deleting gadgets, see Gadgets.

Upcoming events gadget settings

Using the gadget's settings, you can control its appearance and content.

Read more/less

For instructions on displaying gadget settings, see Gadgets.

The following settings are available for upcoming events gadgets:

Setting	Description
Show next *x* events	Choose the number of upcoming events you want to display in the list.
Filter events by tag	You can filter the list of upcoming events so that it displays only events with certain event tags. To filter the list, check only those event tags you want represented in the list.
Show restricted events to public	Choose whether to show events with restricted access to public visitors – those who are not signed in as members or administrators.
Text to show when there are no events	Specify the text to be displayed if there are no upcoming events to display in the list.
Gadget title	If you specify a gadget title, the title will appear specially formatted within the gadget. Depending on the gadget style you choose, the title may appear in a heading box. For Kaleidoscope themes, use a Headline gadget inste ad of specifying a gadget title.
Gadget style	The gadget style determines the physical appearance of the gadget. The style you choose will determine the color and format of the gadget title, the gadget content, and the gadget border. You can choose from theme-specific styles and styles that are common to all themes. For Terra and Firma themes, the **Opacity 60%** style results in a semi-transparent gadget background.
Margins	The amount of space – in pixels – that appears outside the gadget. You can set top, bottom, left, and right margins separately.
Padding	(*Kaleidoscope themes only*) The amount of space – in pixels – that appears between the content of the gadget and the outer limits of the gadget. You can set top, bottom, left, and right padding separately. If you have set a fixed height for the gadget, the bottom padding will be ignored.
Advanced	Within the **Advanced** section, you can enter CSS code or classes to further control the appearance and behavior of the gadget. For more information, see Advanced gadget settings.

Changing colors and fonts

You can change the colors, text styles, and backgrounds used in your website from the Colors and styles screen.

Read more/less

For more advanced fine-tuning, you can use CSS customization and theme overrides .

For upcoming events gadgets, you can modify the following elements from the Colors and styles screen:

To change...	modify...	under...

Gadget title	H4 Title	General formatting or Typography Gadgets or Gadget styles (*Blueprint, Clean Lines, Dark Impact, Fiesta, Firma, Homestead, Showcase, Skyline, Terra, and White Space themes*)
Event name/link	Text/Normal Link	General formatting or Typography
Date and location	Text/Normal Location	General formatting or Typography Gadgets/Gadget styles (*Blueprint, Building Blocks, Clean Lines, Dark Impact, Fiesta, Firma, Homestead, Kaleidoscope, Showcase, Skyline, Terra, Tinted Tiles, and White Space themes*) Typography (*for Bookshelf themes*)

Any changes you make will be applied to other gadgets that use the same settings.

On this page:

Expand all sections

See also:

- How to insert a gadget
- Setting up events

Forum gadgets

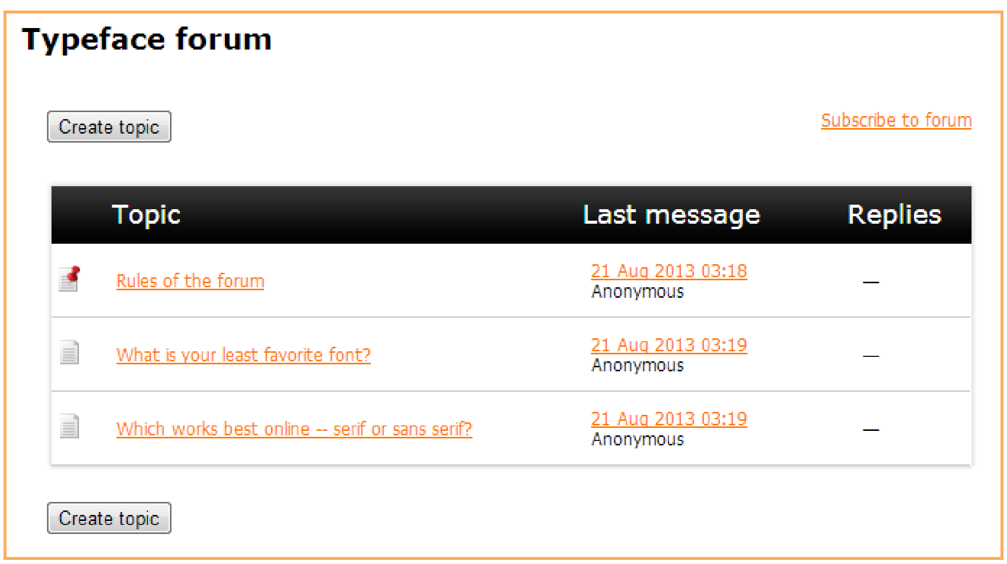
Forum gadgets

- Discussion forum gadget
- Forum summary gadget
- Forum updates gadget

Discussion forum gadget

Discussion forum gadget

You can add a discussion forum gadget to a page on your Wild Apricot site so that members can post messages and reply to other messages. Adding a forum page provides your members a place to congregate, collaborate, and discuss ideas.



You can create as many discussion forums as you wish, each on its own page. You can limit access to a forum by placing it on a page with restricted access. Even if you place the forum on a public page, you can still use the discussion forum gadget's settings to control functionality for public visitors and members.

For instructions on inserting, moving, and deleting gadgets, see Gadgets.

> ⚠ You cannot add a discussion forum gadget – or any other singular gadget – to a page template or system page, or to a page containing another singular gadget.

You can add a forum summary gadget to a page to display a summary of the activity in multiple discussion forums. Using the forum updates gadget, you can display a list of the most recent forum updates. For more information on setting up and using discussion forums, see Discussion forums.

> ⓘ You can embed a Wild Apricot forum on another website using widgets.

Discussion forum gadget settings

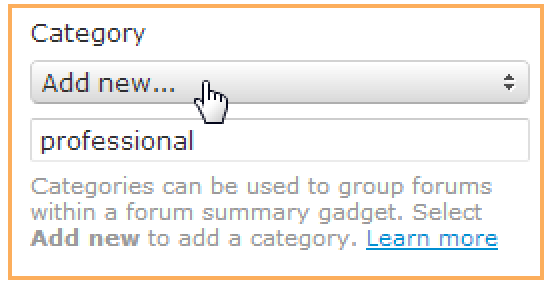
Using the gadget's settings, you can control its appearance and the ability of visitors to read, respond to, and post forum topics.

Read more/less

For instructions on displaying gadget settings, see Gadgets.

The following settings are available for discussion forum gadgets:

Setting	Description
Forum name	The name used to identify the forum within the settings for the forum updates gadget and forum summary gadget.
User picture field	Select a picture field from your contact or membership database if you want to display a picture above the member's name in forum messages. You might, for example, allow members to chose avatars to represent their online identity. If member pictures are enabled, the member's picture will be displayed in their forum posts unless the picture field is restricted under their privacy settings.
Default order for replies	Sets the default order in which forum replies are listed (newest to oldest or oldest to newest). Visitors to your forum will have the option of changing the order for each forum topic.
Forum description	A brief description that will appear for the forum on the forum summary gadget, and optionally, on this gadget as well.
Show on this page	Controls whether the forum description appear on this gadget as well as the forum summary gadget.

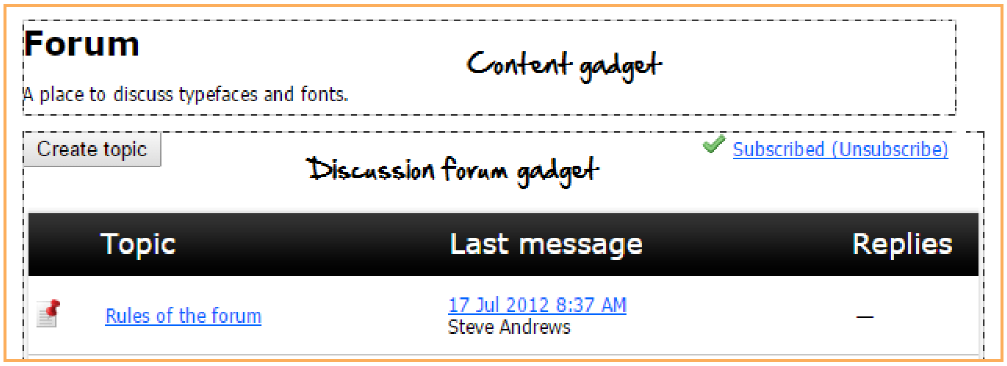
Category	If you have multiple forum pages, you can assign each one to a category. The categories are used to group forums on a forum summary page. To create a new category, click **Add new**, then type the category name in the field below. 
Access permissions	Controls what different kinds of visitors to the forum can do. You can set access permissions separately for public visitors, and for each membership level and member group. If you restrict permissions by both membership levels and member groups, then members will be granted the highest permission assigned to the levels and groups they belong to. For example, if you provide read-only access for Bronze members but full access to members of the Steering Committee member group, then a Bronze member who is also a member of the Steering Committee will be granted full access. You can choose from the following permission settings: – No access: Cannot read forum topics. – Read: Can read topics, but cannot reply or create new topics. – Read, comment: Can read topics and reply to them, but cannot create new topics. – Read, comment, create topics: Can read topics, reply to them, and create new topics. Public visitors (non-members) can never create new topics. Administrators in admin view can always view, reply to, and create topics, and modify and delete any topic or reply. In public view, administrators are subject to the same restrictions as others at the same membership level.
Margins	The amount of space – in pixels – that appears outside the gadget. You can set top, bottom, left, and right margins separately.
Padding	(*Kaleidoscope themes only*) The amount of space – in pixels – that appears between the content of the gadget and the outer limits of the gadget. You can set top, bottom, left, and right padding separately. If you have set a fixed height for the gadget, the bottom padding will be ignored.
Advanced	Within the **Advanced** section, you can enter CSS code or classes to further control the appearance and behavior of the gadget. For more information, see Advanced gadget settings.

Adding a title and description

You can add a title and description for a discussion forum by inserting a content gadget ahead of the discussion forum gadget.

Read more/less

Within the content gadget, you can format the title and description using text styles.



For more information on inserting text and using text styles, see Using the content editor.

Changing colors and fonts

You can change the colors, text styles, and backgrounds used in your website from the Colors and styles screen.

Read more/less

For more advanced fine-tuning, you can use CSS customization and theme overrides.

For discussion forum gadgets, you can modify the following elements from the Colors and styles screen:

To change...	modify...	under...
"Subscribe/Unsubscribe"	Text/Normal Link	General formatting or Typography
Forum headings	Text/Normal H4 Column/Forum headings	General formatting or Typography Forum (*Bookshelf, Building Blocks, Clean Lines, Dark Impact, Fiesta, Firma, Homestead, Kaleidoscope, Skyline, Terra, Tinted Tiles, Treehouse, Whiteboard and White Space themes*)
Forum entries	Text/Normal Link Text	General formatting or Typography List (*Blueprint themes*)
Table rows	Table row Row	Forum (*Bookshelf, Building Blocks, Clean Lines, Dark Impact, Fiesta, Firma, Homestead, Kaleidoscope, Skyline, Terra, Tinted Tiles, Treehouse, Whiteboard and White Space themes*) List (*Blueprint themes*)
Links within table	Table links Link	Forum (*Bookshelf, Building Blocks, Clean Lines, Dark Impact, Fiesta, Firma, Homestead, Kaleidoscope, Skyline, Terra, Tinted Tiles, Treehouse, Whiteboard and White Space themes*) List (*Blueprint themes*)
Topic author	Author	Forum (*Bookshelf, Building Blocks, Clean Lines, Dark Impact, Fiesta, Firma, Homestead, Kaleidoscope, Skyline, Terra, Tinted Tiles, Treehouse, Whiteboard and White Space themes*)

Topic date and time	Date and time	Forum (*Bookshelf, Building Blocks, Clean Lines, Dark Impact, Fiesta, Firma, Homestead, Kaleidoscope, Skyline, Terra, Tinted Tiles, Treehouse, Whiteboard and White Space themes*)
Create topic button	Normal/Hover	Functional buttons (*Clean Lines, Dark Impact, Fiesta, White Space themes*)
Icons used on mobile version	Icons	Forum (*Bookshelf, Building Blocks, Clean Lines, Dark Impact, Fiesta, Firma, Homestead, Kaleidoscope, Skyline, Terra, Tinted Tiles, Whiteboard and White Space themes*)

Any changes you make will be applied to other gadgets that use the same settings.

On this page:

- Discussion forum gadget settings
- Adding a title and description
- Changing colors and fonts

Expand all sections

See also:

- How to insert a gadget
- Setting up and using discussion forums
- Forum updates gadget
- Forum summary gadget

Forum summary gadget

Forum summary gadget

If you have multiple discussion forums, you can use the forum summary gadget to display a summary of the activity in your discussion forums.

The forums are grouped within the summary by the categories you assigned to each forum in the discussion forum gadget settings. Forum names and descriptions are also derived from discussion forum gadget settings.

For instructions on inserting, moving, and deleting gadgets, see Gadgets.

> You cannot add a forum summary gadget – or any other singular gadget – to a page template or system page, or to a page containing another singular gadget.

For more information on setting up and using discussion forums, see Setting up and using discussion forums.

You can embed a Wild Apricot forum summary on another website using widgets.

Forum summary gadget settings

Using the gadget's settings, you can control its appearance and content.

Read more/less

For instructions on displaying gadget settings, see Gadgets.

The following settings are available for forum summary gadgets:

Setting	Description
Forums to include	Choose the forums to be included in the forum summary. Forums are identified using the forum name you specified as part of the discussion forum gadget settings. If you check the **All forums** option then all forums – including any forums added in the future – will be selected.
Margins	The amount of space – in pixels – that appears outside the gadget. You can set top, bottom, left, and right margins separately.
Padding	(*Kaleidoscope themes only*) The amount of space – in pixels – that appears between the content of the gadget and the outer limits of the gadget. You can set top, bottom, left, and right padding separately. If you have set a fixed height for the gadget, the bottom padding will be ignored.
Advanced	Within the **Advanced** section, you can enter CSS code or classes to further control the appearance and behavior of the gadget. For more information, see Advanced gadget settings.

Changing colors and fonts

You can change the colors, text styles, and backgrounds used in your website from the Colors and styles screen.

Read more/less

For more advanced fine-tuning, you can use CSS customization and theme overrides.

For forum summary gadgets, you can modify the following elements from the Colors and styles screen:

To change...	modify...	under...
Forum category	Forum category	Forum (*Bookshelf, Building Blocks, Clean Lines, Dark Impact, Fiesta, Firma, Homestead, Kaleidoscope, Showcase, Skyline, Terra, Tinted Tiles, Treehouse, Whiteboard, and White Space themes only*)
Forum name	H5	General formatting or Typography
Column headings	Column headings H4	Forum (*Bookshelf, Building Blocks, Clean Lines, Dark Impact, Fiesta, Firma, Homestead, Kaleidoscope, Showcase, Skyline, Terra, Tinted Tiles, Treehouse, Whiteboard, and White Space themes only*) General formatting or Typography
Summary text	Text	General formatting or Typography
Summary links	Links	General formatting or Typography
Table listing forum topics	Info box	General formatting (*for Blueprint, Business Casual, and Granite themes*)

Table rows	Table row	Forum (*Bookshelf, Building Blocks, Clean Lines, Dark Impact, Fiesta, Firma, Homestead, Kaleidoscope, Showcase, Skyline, Terra, Tinted Tiles, Treehouse, Whiteboard, and White Space themes only*)
Links within table	Table links	Forum (*Bookshelf, Building Blocks, Clean Lines, Dark Impact, Fiesta, Firma, Homestead, Kaleidoscope, Showcase, Skyline, Terra, Tinted Tiles, Treehouse, Whiteboard, and White Space themes only*)
Topic author	Author	Forum (*Bookshelf, Building Blocks, Clean Lines, Dark Impact, Fiesta, Firma, Homestead, Kaleidoscope, Showcase, Skyline, Terra, Tinted Tiles, Treehouse, Whiteboard, and White Space themes only*)
Topic date and time	Date and time	Forum (*Bookshelf, Building Blocks, Clean Lines, Dark Impact, Fiesta, Firma, Homestead, Kaleidoscope, Showcase, Skyline, Terra, Tinted Tiles, Treehouse, Whiteboard, and White Space themes only*)
Icons used on mobile version	icons	Forum (*Building Blocks, Clean Lines, Dark Impact, Fiesta, Firma, Homestead, Kaleidoscope, Showcase, Skyline, Terra, Tinted Tiles, and White Space themes*)

Any changes you make will be applied to other gadgets that use the same settings.

On this page:

Expand all sections

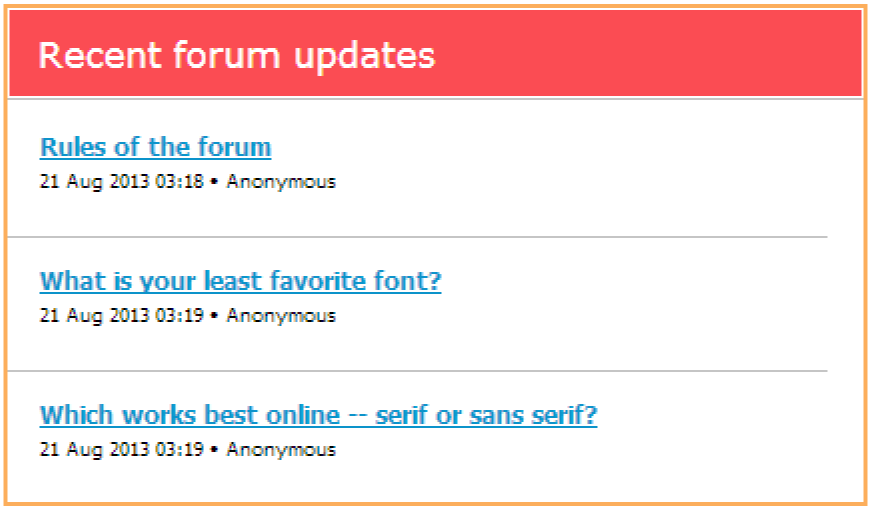
See also:

- How to insert a gadget
- Setting up and using discussion forums
- Discussion forum gadget
- Forum updates gadget

Forum updates gadget

Forum updates gadget

You can display a list of the most recent forum updates by adding a forum updates gadget to a page or page template on your Wild Apricot site.



Topics from multiple forums will be combined into a single list. Topics are displayed in chronological order, beginning with the most recent. Sticky topics are treated the same as other topics.

You can insert the gadget into a page onto your site, or into a page template so that all pages that use that template will automatically display the gadget. For instructions on inserting, moving, and deleting gadgets, see Gadgets.

For more information on setting up and using discussion forums, see Setting up and using discussion forums.

Gadget settings

Using the gadget's settings, you can control its appearance and content.

Read more/less

The following settings are available for forum updates gadgets:

Setting	Description
Show last *n* topics	Choose the number of recent forum updates (1 to 99) that you want to display on the gadget.
Forums to include	Choose the forums to be included in the forum updates. Forums are identified using the forum name you specified as part of the discussion forum gadget settings. If you check the **All forums** option then all forums – including any forums added in the future – will be selected.
Text to show when there are no topics	The text to be displayed when there are no forum updates to display.
Gadget title	If you specify a gadget title, the title will appear specially formatted within the gadget. Depending on the gadget style you choose, the title may appear in a heading box. For Kaleidoscope themes, use a Headline gadget instead of specifying a gadget title.
Gadget style	The gadget style determines the physical appearance of the gadget. The style you choose will determine the color and format of the gadget title, the gadget content, and the gadget border. You can choose from theme-specific styles and styles that are common to all themes. For Terra and Firma themes, the **Opacity 60%** style results in a semi-transparent gadget background.

Margins	The amount of space – in pixels – that appears outside the gadget. You can set top, bottom, left, and right margins separately.
Padding	(*Kaleidoscope themes only*) The amount of space – in pixels – that appears between the content of the gadget and the outer limits of the gadget. You can set top, bottom, left, and right padding separately. If you have set a fixed height for the gadget, the bottom padding will be ignored.
Advanced	Within the **Advanced** section, you can enter CSS code or classes to further control the appearance and behavior of the gadget. For more information, see Advanced gadget settings.

Changing colors and fonts

You can change the colors, text styles, and backgrounds used in your website from the Colors and styles screen.

Read more/less

For more advanced fine-tuning, you can use CSS customization and theme overrides.

For forum updates gadgets, you can modify the following elements from the Colors and styles screen:

To change...	modify...	under...
Gadget title	H4 Title	General formatting or Typography Gadgets or Gadget styles (*Blueprint, Clean Lines, Dark Impact, Fiesta, Firma, Homestead, Showcase, Skyline, Terra, and White Space themes*)
Topic title/link	Text/Normal Link	General formatting or Typography
Author	Text/Normal Link Author	General formatting or Typography Gadget styles (*Blueprint themes*) Forum (*Bookshelf, Building Blocks, Clean Lines, Dark Impact, Fiesta, Firma, Homestead, Kaleidoscope, Showcase, Skyline, Terra, Tinted Tiles, Treehouse, Whiteboard, and White Space themes*)
Update date	Text/Normal Date and time	General formatting or Typography Gadget styles (*Blueprint themes*) Forum (*Bookshelf, Building Blocks, Clean Lines, Dark Impact, Fiesta, Firma, Homestead, Kaleidoscope, Showcase, Skyline, Terra, Tinted Tiles, Treehouse, Whiteboard, and White Space themes*)

Any changes you make will be applied to other gadgets that use the same settings.

On this page:

- Gadget settings
- Changing colors and fonts

Expand all sections

See also:

- How to insert a gadget
- Setting up and using discussion forums

- Discussion forum gadget
- Forum summary gadget

Log in gadgets

Log in gadgets

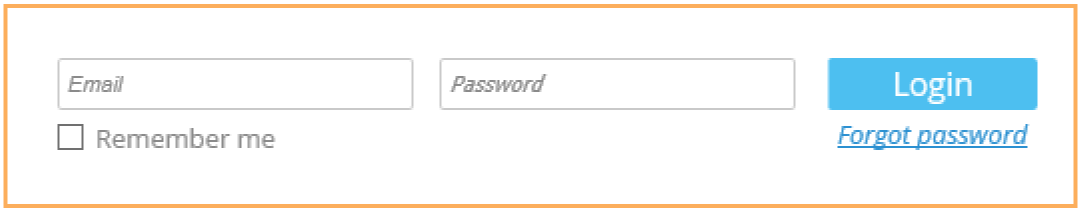
- Log in form gadget
- Log in button gadget

Log in form gadget

Log in form gadget

Logging in is necessary to:

- perform administration functions
- access member only pages
- perform member self-service functions (see Online self-service).



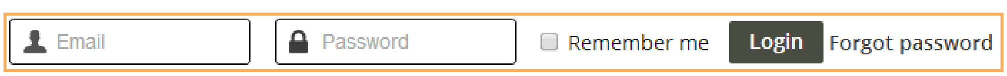
Once a member is logged in, the log in form is replaced by links that allow the member to log out, change their password, and view their member profile.

To display a log in button rather than a log in form, you can insert a log in button gadget.

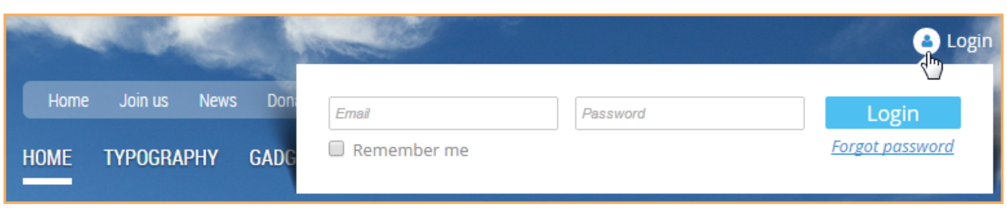
Since logging in is such an important function, you should include a log in form or log in button gadget on most of your Wild Apricot pages. So that you don't have to add a log in gadget to every page individually, you might consider adding a log in gadget to one or more page templates, so that pages based on the templates automatically display the form. For instructions on inserting, moving, and deleting gadgets, see Gadgets.

The orientation of the log in box – horizontal or vertical – can be controlled for Blueprint, Bookshelf, Building Blocks, Clean Lines, Dark Impact, Fiesta, Firma, Skyline, Terra, Tinted Tiles, Treehouse, Whiteboard, and White Space themes. For all other themes, the orientation is determined by the theme.

When using Blueprint, Bookshelf, Building Blocks, Clean Lines, Dark Impact, Fiesta, Firma, Skyline, Terra, Tinted Tiles, Treehouse, Whiteboard, or White Space themes, you can also hide the **Remember me** and **Forgot password** labels, and control whether the email and password labels appear within the entry fields, or outside them.



On Skyline themes, the log in box appears when you click the Login icon.



Within the page preview, log in gadgets appear differently depending on whether the user is logged in. As part of the log in button gadget settings, you can choose which state to display.

Log in form gadget settings

Using the gadget's settings, you can control its appearance and behavior.

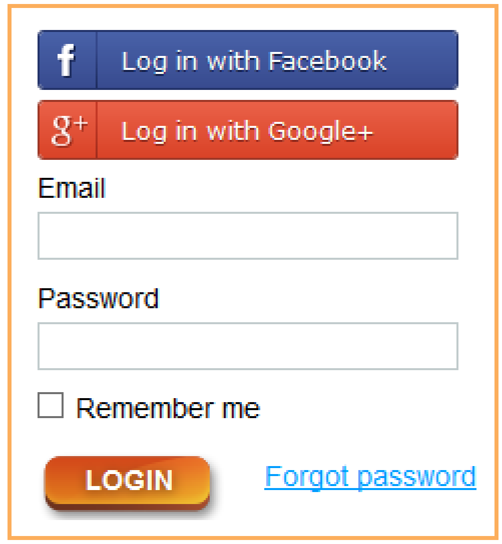
Read more/less

For instructions on displaying gadget settings, see Gadgets.

The following settings are available for log in form gadgets. Some settings are not available for all website themes.

Setting	Description
Preview state	Choose whether you want the page preview to display the log in form as if the user is logged in or not logged in.
Orientation	*(Blueprint, Bookshelf, Building Blocks, Clean Lines, Dark Impact, Fiesta, Firma, Homestead, Showcase, Skyline, Terra, Tinted Tiles, Treehouse, Whiteboard, and White Space themes)* Controls whether the log in form is positioned horizontally or vertically.
Align	(*Building Blocks, Firma, Homestead, Showcase, Terra, Tinted Tiles, Treehouse themes*) Control the horizontal alignment of the gadget. You can choose from left, centered, and right alignment.

<table>
<tr>
<td>Option to log in via social networks</td>
<td>
Controls whether buttons appear that allow members to log in using their Facebook or Google+ credentials.



Regardless of your choice here, social login buttons will appear on the **Authorization required** system page that appears when someone clicks the **Login** button within a log in button gadget , and at the bottom of each private member profile.

To remove the social login buttons from the **Authorization required** system page, add the following code to the CSS customization screen:

```
.WaGadgetAuthorizationRequired .openAuthFormContainer
{
display: none !important;
}
```

To remove the buttons from private member profiles, use the following code:

```
#socialLoginContainer,
#idSocialLoginContainer {
 display: none;
}
```
</td>
</tr>
<tr>
<td>Labels inside boxes</td>
<td>*(Blueprint, Bookshelf, Building Blocks, Clean Lines, Dark Impact, Fiesta, Firma, Homestead, Showcase, Skyline, Terra, Tinted Tiles, Treehouse, Whiteboard, and White Space themes)* Controls whether the email and password labels appear within the entry fields or outside them.</td>
</tr>
</table>

Remember me checkbox	*(Blueprint, Bookshelf, Building Blocks, Clean Lines, Dark Impact, Fiesta, Firma, Homestead, Showcase, Skyline, Terra, Tinted Tiles, Treehouse, Whiteboard, and White Space themes*) Controls whether the Remember me checkbox appears within the log in form.
Forgot password link	(*Blueprint, Bookshelf, Building Blocks, Clean Lines, Dark Impact, Fiesta, Firma, Homestead, Showcase, Skyline, Terra, Tinted Tiles, Treehouse, Whiteboard, and White Space themes*) Controls whether the Forgot password link appears within the log in form.
Gadget title	(*Blueprint, Bookshelf, Clean Lines, Dark Impact, Fiesta, Firma, Homestead, Showcase, Skyline, Terra, Treehouse, Whiteboard, and White Space themes*) If you specify a gadget title, the title will appear specially formatted within the gadget. Depending on the gadget style you choose, the title may appear in a heading box. For Kaleidoscope themes, use a Headline gadget instead of specifying a gadget title.
Gadget style	(*Blueprint, Bookshelf, Clean Lines, Dark Impact, Fiesta, Firma, Homestead, Terra, Treehouse, Whiteboard, and White Space themes*) The gadget style determines the physical appearance of the gadget. The style you choose will determine the color and format of the gadget title, the gadget content, and the gadget border. You can choose from theme-specific styles and styles that are common to all themes.
Margins	The amount of space – in pixels – that appears outside the gadget. You can set top, bottom, left, and right margins separately.
Padding	(*Kaleidoscope themes only*) The amount of space – in pixels – that appears between the content of the gadget and the outer limits of the gadget. You can set top, bottom, left, and right padding separately. If you have set a fixed height for the gadget, the bottom padding will be ignored.
Advanced	Within the **Advanced** section, you can enter CSS code or classes to further control the appearance and behavior of the gadget. For more information, see Advanced gadget settings.

Changing colors and fonts

You can change the colors, text styles, and backgrounds used in your website from the Colors and styles screen.

Read more/less

For more advanced fine-tuning, you can use CSS customization and theme overrides.

For log in form gadgets, you can modify the following elements from the Colors and styles screen:

To change...	modify...	under...
Gadget title	H4 Title	General formatting or Typography Gadgets or Gadget styles (*Blueprint, Clean Lines, Dark Impact, Fiesta, Firma, Homestead, Showcase, Terra, Treehouse, Skyline, and White Space themes*)

"Email", "Password",	Text Labels	Login box Log in gadgets
Email, password fields	Input field	Login box or Log in gadgets
"Remember me"	Text	Login box or Log in gadgets
"Forgot password"	Link(s)	Login box or Log in gadgets
Login button	Button/Button style	Login box/Log in gadgets (*Bookshelf, Building Blocks, Clean Lines, Dark Impact, Fiesta, Firma, Homestead, Kaleidoscope, Showcase, Skyline, Terra, Tinted Tiles, Whiteboard, and White Space themes*)

Any changes you make will be applied to other gadgets that use the same settings.

On this page:

- Log in form gadget settings
- Changing colors and fonts

Expand all sections

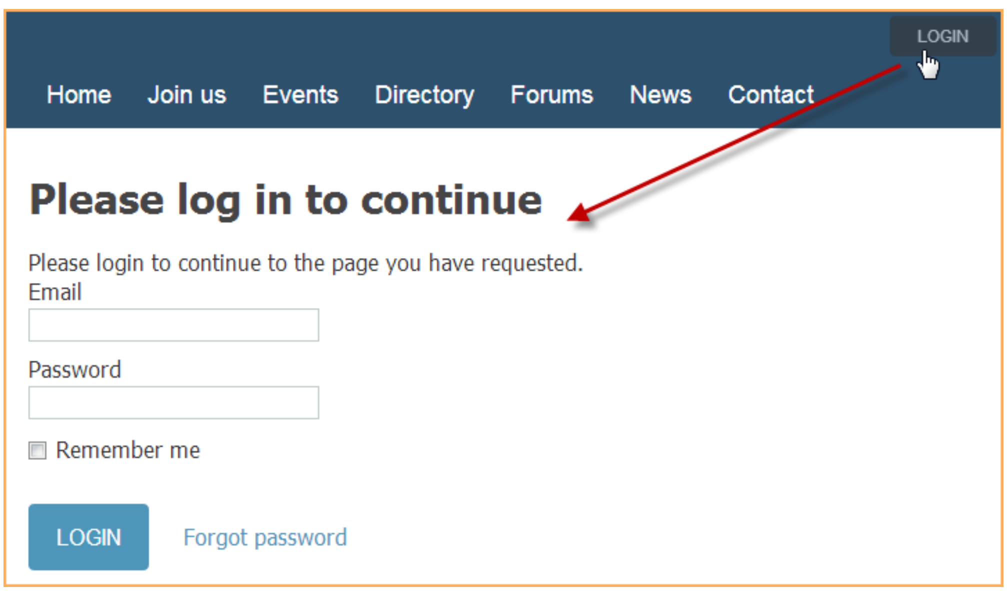
See also:

- How to insert a gadget

Log in button gadget

Log in button gadget

Using this gadget, you can provide a log in button that links to a log in form – the **Authorization required** system page – that members can use to log into your site.



Logging in is necessary to:

- perform administration functions
- access member only pages
- perform member self-service functions (see Online self-service).

Once a member is logged in, the button is replaced by links that allow the member to log out, reset their password, and view their member profile.

To display a log in form rather than a log in button, you can insert a log in form gadget.

Since logging in is such an important function, you should include a log in button or log in form gadget on most of your Wild Apricot pages. So that you don't have to add a log in gadget to every page individually, you might consider adding a log in gadget to one or more page templates, so that pages based on the templates automatically display the button. For instructions on inserting, moving, and deleting gadgets, see Gadgets.

Log in gadgets appear differently in the page preview depending on whether the user is logged in. As part of the log in button gadget settings, you can choose which state to display.

For instructions on customizing the **Authorization required** system page, see System pages.

Log in button gadget settings

Using the gadget's settings, you can control its appearance and content. For instructions on displaying gadget settings, see Gadgets.

The following settings are available for log in button gadgets:

Setting	Description
Preview state	Choose whether you want the page preview to display the log in form as if the user is logged in or not logged in.
Margins	The amount of space – in pixels – that appears outside the gadget. You can set top, bottom, left, and right margins separately.
Padding	(*Kaleidoscope themes only*) The amount of space – in pixels – that appears between the content of the gadget and the outer limits of the gadget. You can set top, bottom, left, and right padding separately. If you have set a fixed height for the gadget, the bottom padding will be ignored.
Align	(*for Building Blocks, Clean Lines, Dark Impact, Fiesta, Firma, Homestead, Kaleidoscope, Showcase, Terra, Tinted Tiles, Treehouse, and White Space themes*) Control the horizontal alignment of the gadget. You can choose from left, centered, and right alignment.
Advanced	Within the **Advanced** section, you can enter CSS code or classes to further control the appearance and behavior of the gadget. For more information, see Advanced gadget settings.

See also:

- How to insert a gadget
- Changing button labels

Membership gadgets

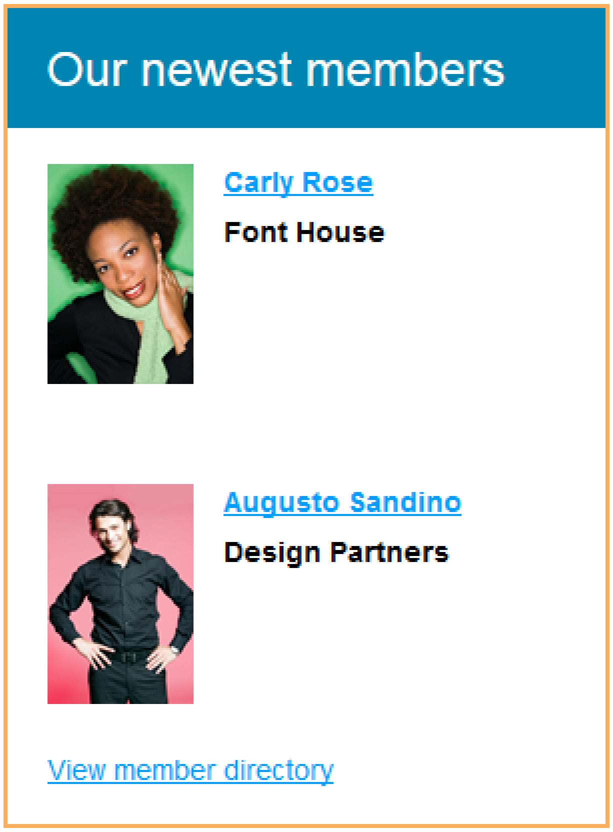
Membership gadgets

- Featured member gadget
- Membership application gadget
- Member directory gadget
- Subscription form gadget

Featured member gadget

Featured member gadget

Using this gadget, you can display information about a specific member or a specified number of members, drawn randomly from a saved search or from selected membership levels. For example, you might want to highlight your sponsors or partners, display your board of directors, or shine the spotlight on your volunteers or latest new members.



A different set of members will be displayed each time the page is viewed or refreshed.

Within the featured member gadget settings, you can specify a gadget title, choose the layout and style of the gadget, and select up to 3 common or membership fields to display for each member. You can also decide whether to include a link to a page displaying a member directory gadget.

> ⚠ Whether a member appears in the directory also depends on that member's privacy settings.

For instructions on inserting, moving, and deleting gadgets, see Gadgets .

Featured member gadget settings

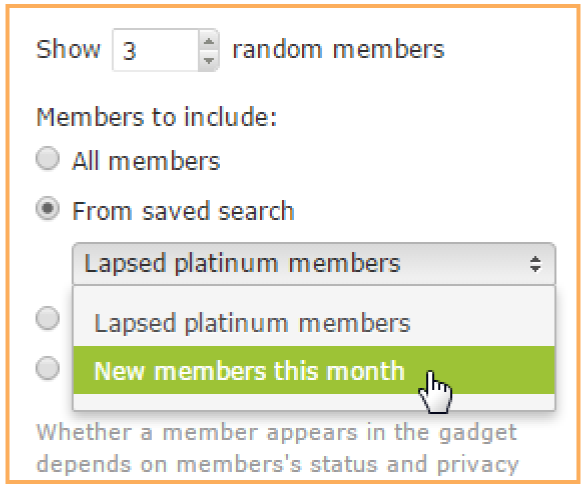
Using the gadget's settings, you can control the number of the members that are displayed, and the information that gets displayed for each member. You can also control the appearance of the gadget, including the gadget title, layout, and style.

Read more/less

For instructions on displaying gadget settings, see Gadgets.

The following settings are available for featured member gadgets:

Setting	Description
Show x random numbers	The number of members to be displayed.

Members to include	Choose the kinds of members to be displayed. You can include all members, use a saved member search to limit members to those that match the saved search criteria, restrict the list to members at selected membership levels, or select a specific member. When you choose the **From saved search** option, you can choose from a list of your saved member searches.  When you choose the **Selected levels** option, you can choose one or more membership levels to be included.

<table>
<tr><td>Layout</td><td>Controls the positioning of label fields relative to the member picture. The following options are available:
<table>
<tr><th>Option</th><th>Example</th></tr>
<tr><td>Image on top</td><td>
</td></tr>
<tr><td>Image on the left</td><td></td></tr>
<tr><td>List</td><td>

The List layout does not display the contents of the Label 3 field.</td></tr>
</table></td></tr>
<tr><td>Member picture</td><td>Determines whether a picture is displayed for each member, and if so, which picture field to use. You can choose from any common field or membership field that uses the Picture type.</td></tr>
<tr><td>Member label, Label 2, Label 3</td><td>You can specify up to 3 fields to be displayed for each member. You can choose from common and membership fields. The first field – the member label – is used to identify the member and is formatted as a link to the member's profile.

The Label 3 field will not be displayed when the Layout is set to List.</td></tr>
<tr><td>Link to member directory</td><td>Controls whether a link to a page displaying a member directory gadget appears at the bottom of the featured member gadget. You can choose to link to any publicly accessible page displaying a member directory gadget.</td></tr>
</table>

Link label	Label for link to member directory.
Gadget title	If you specify a gadget title, the title will appear at the top of the gadget. Depending on the gadget style you choose, the title may appear within a heading box. For Kaleidoscope themes, use a Headline gadget instead of specifying a gadget title.
Gadget style	The gadget style determines the physical appearance of the gadget. The style you choose will determine the color and format of the gadget title, the gadget content, and the gadget border. You can choose from theme-specific styles and styles that are common to all themes.
Margins	The amount of space – in pixels – that appears outside the gadget. You can set top, bottom, left, and right margins separately.
Padding	(*Kaleidoscope themes only*) The amount of space – in pixels – that appears between the content of the gadget and the outer limits of the gadget. You can set top, bottom, left, and right padding separately. If you have set a fixed height for the gadget, the bottom padding will be ignored.
Advanced	Within the **Advanced** section, you can enter CSS code or classes to further control the appearance and behavior of the gadget. For more information, see Advanced gadget settings.

Changing colors and fonts

You can change the colors, text styles, and backgrounds used in your website from the Colors and styles screen.

Read more/less

For more advanced fine-tuning, you can use CSS customization and theme overrides.

For featured member gadgets, you can modify the following elements from the Colors and styles screen:

To change...	modify...	under...
Gadget title	H4 Title	General formatting or Typography Gadgets or Gadget styles (*Blueprint, Building Blocks, Clean Lines, Dark Impact, Fiesta, Firma, Homestead, Showcase, Skyline, Terra, and White Space themes*)
Member link	Member label H4 Link	Featured member (*Building Blocks, Kaleidoscope, Tinted Tiles themes*) General formatting or Typography
Label 2	Label 2 Text/Normal	Featured member (*Building Blocks, Kaleidoscope, Tinted Tiles themes*) General formatting or Typography
Label 3	Label 3 Text/Normal	Featured member (*Building Blocks, Kaleidoscope, Tinted Tiles themes*) General formatting or Typography
Link to member directory	Link to member directory Text/Normal Link	Featured member (*Building Blocks, Kaleidoscope, Tinted Tiles themes*) General formatting or Typography

Any changes you make will be applied to other gadgets that use the same settings.

Troubleshooting

Selected label fields not appearing

If the fields you have selected as labels are not appearing in your featured member gadget, check the following:

- the access settings for the selected field(s)
- the member privacy settings for the field(s)

The field(s) might be hidden or set to appear for members only.

The member picture is still not appearing

If you've reviewed the access and privacy settings for the picture field and the member picture still doesn't appear in the featured member gadget, follow these steps:

1. Go into the settings for the featured member gadget and set **Member picture** to **Do not show**.
2. Save your changes.
3. Go into the settings again and set **Member picture** to your picture field.
4. Save your changes.

On this page:

Expand all sections

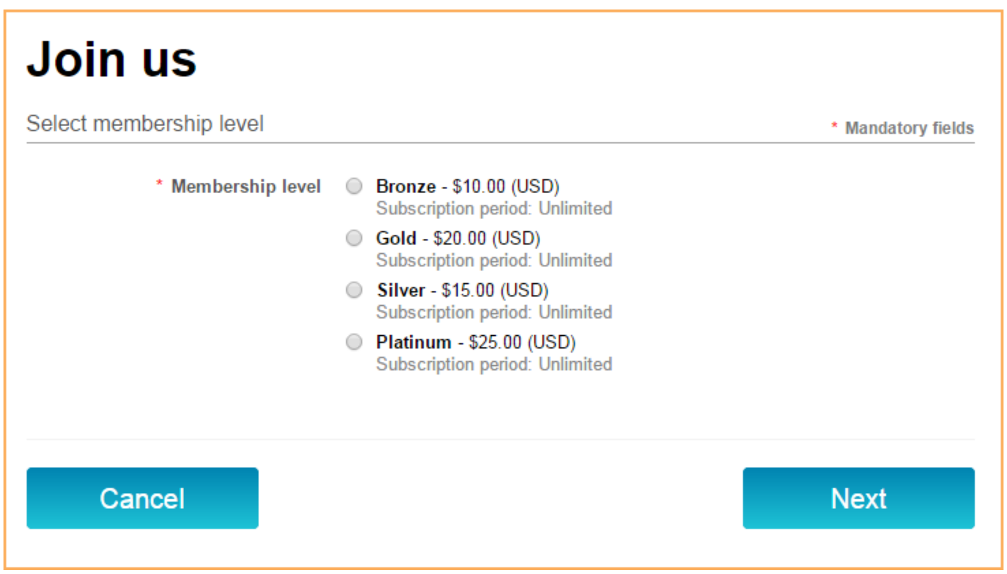
See also:

- How to insert a gadget

Membership application gadget

Membership application gadget

Using this gadget, you can add a membership application form to a page so that visitors can apply for membership in your organization.



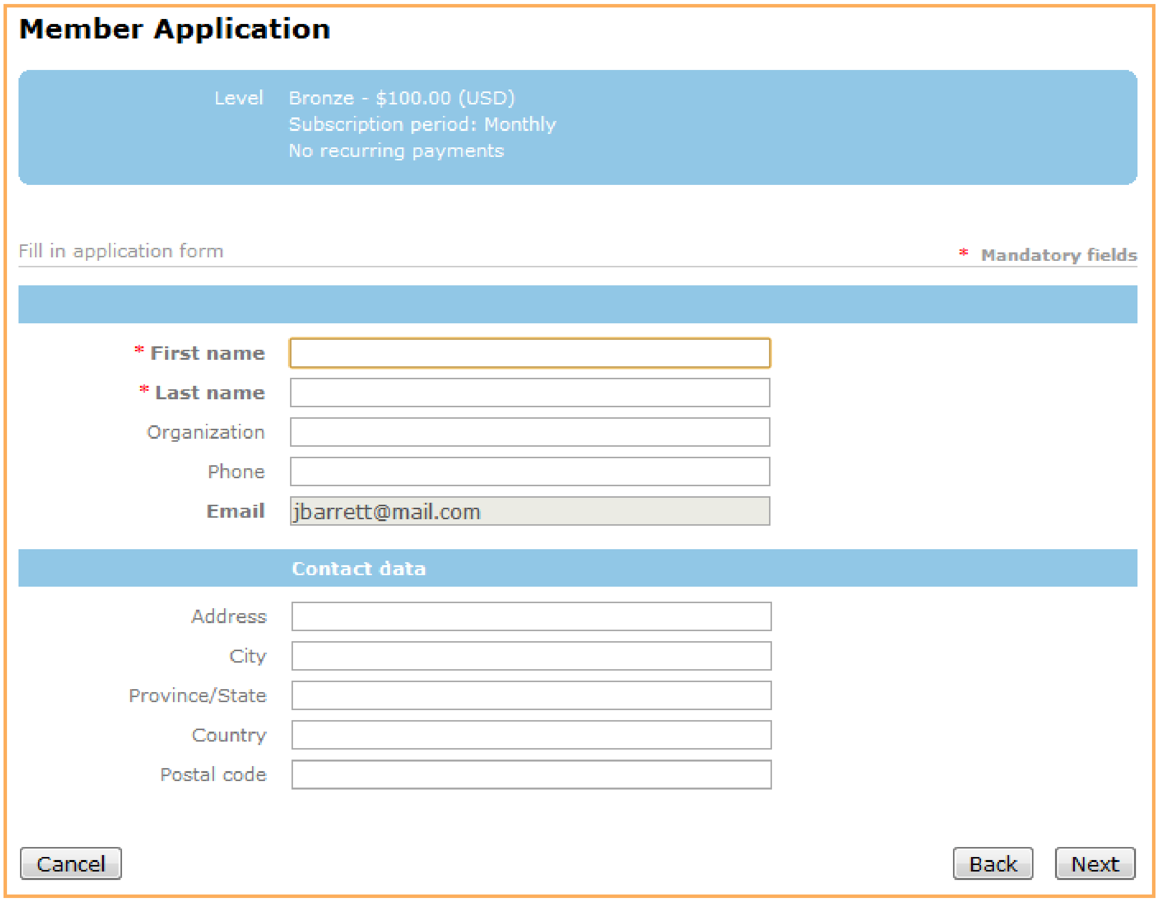
You can have multiple application forms on your site. You can adjust the settings for each membership application gadget so that only selected membership levels are shown.

You cannot add a membership application gadget – or any other singular gadget – to a page template or system page, or to a page containing another singular gadget.

For each membership level you have set up, the following information is displayed:

- Subscription period
- Renewal policy
- Description

After a prospective member selects a membership level and provides their email address, the application form is displayed.



Both common fields and membership fields appear on the form. For information on adding and modifying these fields, see Customizing database fields.

For more information on setting up and using membership application forms, see Membership application form.

Membership application gadget settings

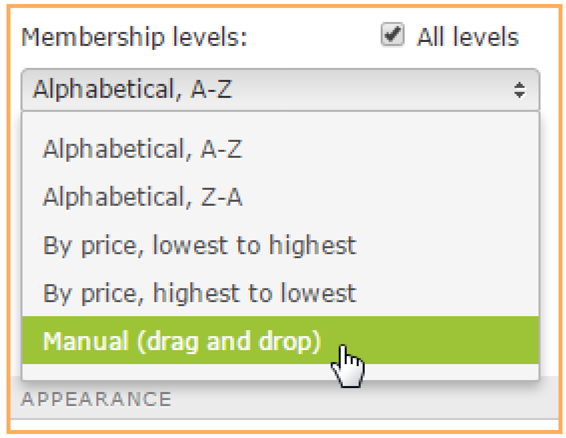
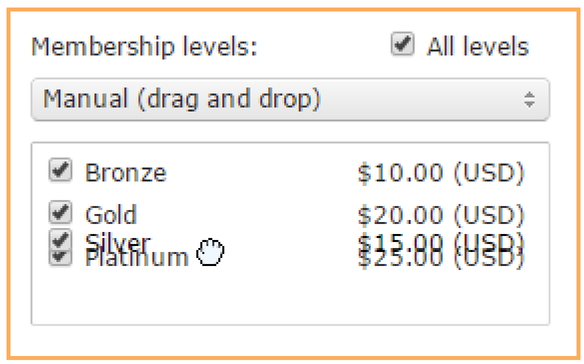
Using the gadget's settings, you can control its appearance and content.

Read more/less

For instructions on displaying gadget settings, see Gadgets.

The following settings are available for membership application gadgets:

Setting	Description

Membership levels	Choose the membership levels to be included on the application form, and the order in which you want them to appear. You can sort membership levels alphabetically or by price, in ascending or descending order, or you can choose the **Manual** sorting option...  ...and determine the order manually by dragging and dropping levels within the list. 
Margins	The amount of space – in pixels – that appears outside the gadget. You can set top, bottom, left, and right margins separately.
Padding	(*Kaleidoscope themes only*) The amount of space – in pixels – that appears between the content of the gadget and the outer limits of the gadget. You can set top, bottom, left, and right padding separately. If you have set a fixed height for the gadget, the bottom padding will be ignored.
Advanced	Within the **Advanced** section, you can enter CSS code or classes to further control the appearance and behavior of the gadget. For more information, see Advanced gadget settings.

Adding a description

You can add a description to your membership application form by inserting a content gadget ahead of the membership application gadget. Within the content gadget, you can add a title and description, and format them using text styles. For more information on adding and formatting text, see Using the content editor.

Changing colors and fonts

You can change the colors, text styles, and backgrounds used in your website from the Colors and styles screen.

Read more/less

For more advanced fine-tuning, you can use CSS customization and theme overrides.

For membership application gadgets, you can modify the following elements from the Colors and styles screen:

To change...	modify...	under...
"Select membership level"	Text/Normal H3 Form instructions	General formatting or General formatting > Typography General formatting > Form (*Bookshelf, Building Blocks, Clean Lines, Dark Impact, Fiesta, Firma, Homestead, Kaleidoscope, Showcase, Skyline, Terra, Tinted Tiles, Treehouse, Whiteboard, and White Space only*)
"Mandatory fields"	Text/Normal Form instructions	General formatting or General formatting > Typography General formatting > Form (*Bookshelf, Building Blocks, Clean Lines, Dark Impact, Fiesta, Firma, Homestead, Kaleidoscope, Showcase, Skyline, Terra, Tinted Tiles, Treehouse, Whiteboard, and White Space only*)
"Membership level"	Text/Normal Labels	General formatting or General formatting > Typography General formatting > Form
Level name	Text/Normal Option title	General formatting or General formatting > Typography General formatting > Form
Level description	Text/Normal Field explanation Option title	General formatting or General formatting > Typography General formatting > Form
Next, Cancel buttons	Normal/Hover	Functional buttons (*Clean Lines, Dark Impact, Fiesta, White Space themes*)
Background color of form	Form >> Background color	General formatting (*for Aurora, Glass, Keynote, Memo, Nature, and Notebook themes*)

Any changes you make will be applied to other gadgets that use the same settings.

On this page:

Expand all sections

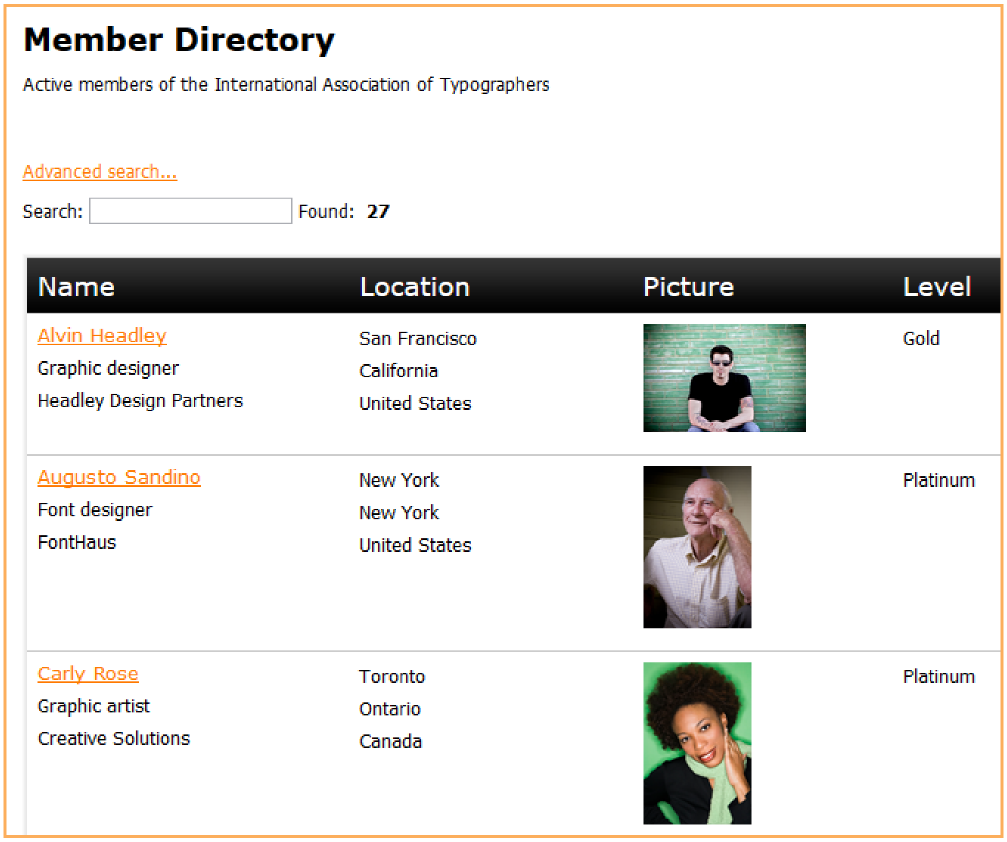
See also:

- How to insert a gadget
- Membership application form
- Setting and changing passwords

Member directory gadget

Member directory gadget

Using this gadget, you can add a member directory to a page on your Wild Apricot site, allowing visitors to see a list of your members, search for members, and view member profiles.



Visitors can search for members within the directory, using simple or advanced search functions. Clicking on a member listing within the directory will display that member's profile (subject to their privacy settings). Whether a member appears in the directory also depends on that member's privacy settings.

For instructions on inserting, moving, and deleting gadgets, see Gadgets.

> ⚠ You cannot add a member directory gadget – or any other singular gadget – to a page template or system page, or to a page containing another singular gadget.

You can control which members appear in the directory, restricting the list by membership level or saved searches. You can also control which fields are displayed for each member and the order in which member records are sorted.

You can create multiple member directory pages, each with different settings. For example, you could set up different member directories for members and non-members, or for different regions.

For more information on setting up and using a member directory, see Member directory.

Adding a title and description

You can add a title and description for a member directory by inserting a content gadget ahead of the member directory gadget. Within the content gadget, you can format the title and description using text styles. For more information, see Using the content editor.

Member directory gadget settings

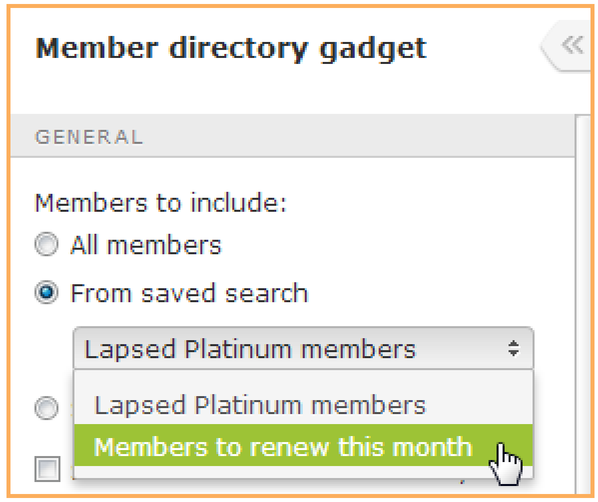
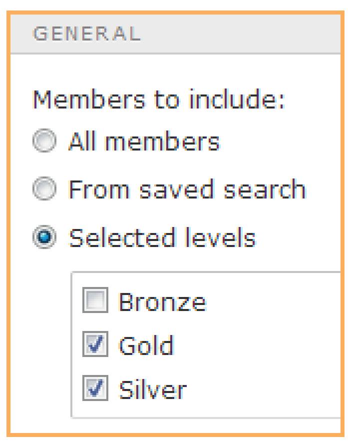
Using the gadget's settings, you can control its appearance and content. You can choose which member records are displayed and in what order, and which fields are displayed for each member and in what order.

Read more/less

For instructions on displaying gadget settings, see Gadgets.

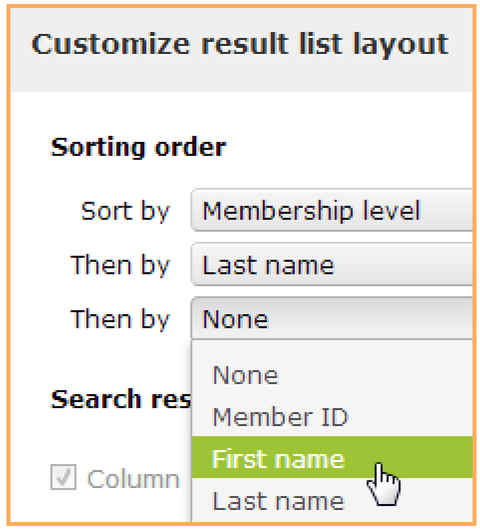
The following settings are available for member directory gadgets:

Setting	Description

Members to include	Choose the kinds of members to be included in the member directory. You can include all members, use a saved member search to limit members to those that match the saved search criteria, or restrict the list to members at selected membership levels. When you choose the **From saved search** option, you can choose from a list of your saved member searches.  The **From saved search** option will only appear if you have a saved member search, and is only available to Community plans and above. When you choose the **Selected levels** option, you can choose one or more membership levels. 
Show bundle administrator only	Choose whether to include only bundle administrators and exclude individual members of bundles. The profiles of individual bundle members will still be accessible from the bundle administrator's profile even if individual members are excluded.
Customize results layout	

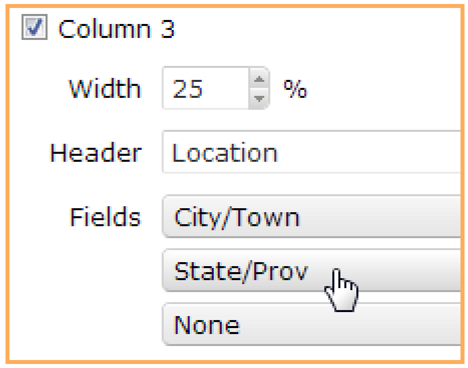
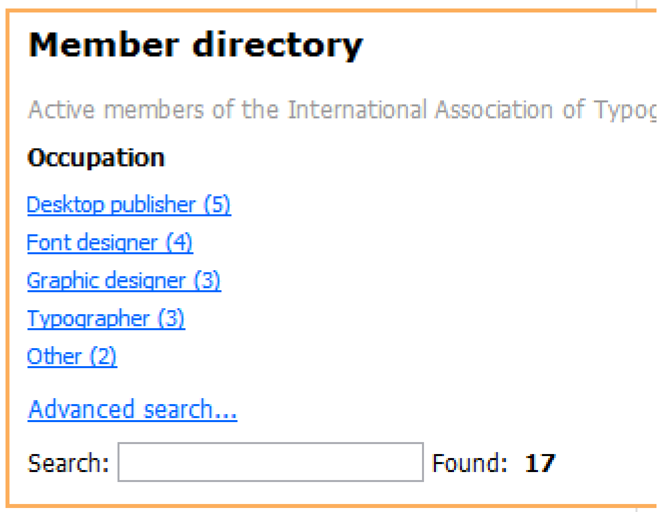
You can control what information is displayed for each member in the directory, as well as the order in which members are listed.

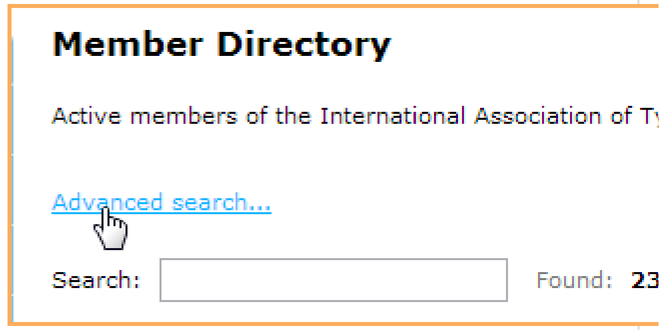
Within the **Sorting order** area, you can control the order in which members are listed in the directory by selecting up to 3 sort fields. For each field, you can choose whether to display the matching records in ascending or descending order. The records will be displayed in order according to the values of the first field, then any duplicate values will sorted by the second field, and so on. For example, you might want to sort by membership level then by last name, and finally by first name.



You can choose any common or membership fields except multi-line text, radio button, or multiple choice fields. Instead of choosing a field, you can choose the **Random** option, to display matching records in random order.

The sorting field must have its member privacy settings set to **Anybody**. If you want to restrict access to the field, you can restrict access within its field settings.

	Within the **Search results layout** area, you can choose up to 4 columns to be displayed, and pick up to 3 database fields to be combined in each column. For example, you could combine first name and last name in column 1; organization and email address in column 2; and city and state in column 3. For each column, you can specify the column width and the column heading.  When searching for members using the simple search, only those columns you choose here will be searched. Information stored for a contact but not displayed on the screen cannot be used to find matching members. For each column, you can also specify the column heading and control the column width. The first field of the first column will automatically appear as a link to the member's public profile page.
Enable quick filtering in simple search	Allows visitors to filter the member list by selecting a particular field value.  When you enable this option, you can choose up to 4 contact or membership fields – multiple choice, radio buttons, and dropdown field types only – for the visitor to use to filter the list.

Enable advanced search	Controls whether an **Advanced search** option is available.  Once you enable this option, you can choose the fields to be available for visitors to search by. If you check the **All fields** option, then all fields – including those added in the future – will be displayed.
Show advanced search by default	Choose whether the member directory is initially displayed with advanced search fields rather than a link to the advanced search function. 
Margins	The amount of space – in pixels – that appears outside the gadget. You can set top, bottom, left, and right margins separately.
Padding	(*Kaleidoscope themes only*) The amount of space – in pixels – that appears between the content of the gadget and the outer limits of the gadget. You can set top, bottom, left, and right padding separately. If you have set a fixed height for the gadget, the bottom padding will be ignored.
Advanced	Within the **Advanced** section, you can enter CSS code or classes to further control the appearance and behavior of the gadget. For more information, see Advanced gadget settings.

Changing colors and fonts

You can change the colors, text styles, and backgrounds used in your website from the Colors and styles screen.

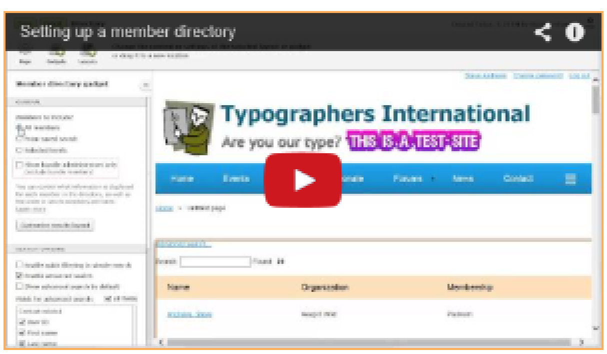
Read more/less

For more advanced fine-tuning, you can use CSS customization and theme overrides.

For member directory gadgets, you can modify the following elements from the Colors and styles screen:

To change...	modify...	under...
Filter field name	Text/Normal	General formatting or Typography
Filter field values	Text/Normal Link	General formatting or Typography
"Advanced search/Simple search"	Text/Normal Link	General formatting or Typography
Search box	Text/Normal	General formatting or Typography
Directory headings	Text/Normal (*Blueprint, Nature, Memo, Glass, Keynote, Notebook, Aurora themes*) Header (*Business Casual, Fiesta, and Granite themes*) Column headings (*Bookshelf, Building Blocks, Clean Lines, Dark Impact, Firma, Homestead, Kaleidoscope, Showcase, Skyline, Terra, Tinted Tiles, Treehouse, Whiteboard, White Space themes*)	General formatting or Typography Table
Directory entries	Text/Normal Table row (*Nature, Memo, Glass, Keynote, Notebook, Aurora themes*)	General formatting or Typography Table
Public profile links	Link (General formatting or Typography) Table row, Table links (*except for Nature, Memo, Glass, Keynote, Notebook, Aurora themes*)	General formatting or Typography Table
Advanced search labels	Text (General formatting or Typography) Label(s) (*except for Nature, Memo, Glass, Keynote, Notebook, Aurora themes*) Text (*Nature, Memo, Glass, Keynote, Notebook, Aurora themes*)	General formatting or Typography Form Form
Advanced search values	Text/Normal (General formatting or Typography) Option title (*except for Nature, Memo, Glass, Keynote, Notebook, Aurora themes*) Text (*Nature, Memo, Glass, Keynote, Notebook, Aurora themes*)	General formatting or Typography Form Form

Any changes you make will be applied to other gadgets that use the same settings.



Video: Setting up a member directory 5:59

On this page:

- Adding a title and description
- Member directory gadget settings
- Changing colors and fonts

Expand all sections

See also:

- How to insert a gadget
- Setting up a member directory

Subscription form gadget

Subscription form gadget

Using the subscription form gadget, you can set up one or more email subscription forms to allow visitors to your site to sign up to receive newsletters, updates, or other manual email blasts.

Signing up for email subscriptions is separate and distinct from the process of subscribing or unsubscribing to automatic emails.

For instructions on inserting, moving, and deleting gadgets, see Gadgets. You cannot add a subscription form gadget – or any other *singular gadget* – to a page template or system page, or to a page containing another singular gadget.

To identify the type of mailing the visitor is signing up for, you enter a descriptive name – e.g. Newsletter – as the **Subscription source** within the settings for the subscription form gadget. To compile the list of subscribers for your email blast, go to the advanced contacts search page, choose **Subscription source** as the search criteria, then select the appropriate subscription source value and perform the search.

For information on setting up and using subscription forms, see Email subscription form.

Subscription form gadget settings

Using the gadget's settings, you can control its appearance and content.

Read more/less

For instructions on displaying gadget settings, see Gadgets.

The following settings are available for subscription form gadgets:

Setting	Description
Subscription source	The name used to identify this subscription source. This name is used to distinguish different subscriptions when searching for subscribers using **Subscription source** as the search criteria. For example, depending on what people are signing up for, you might want to use *Newsletter* or *Site update alerts* are the subscription source.

Fields to include	Select the fields to be included on the subscription form. You can choose some or all of your common fields – except those set to admin-only access – but you cannot deselect the **Email** field. If included on the form, the **First name** and **Last name** fields must be completed before clicking the **Subscribe** button.
Send confirmation email to	Choose whether to send a confirmation email to the subscriber and/or the administrator. To customize the standard subscription confirmation email, go to **Settings** and click **Subscription form email** under **Contact settings**. Within the body of the email, you can add or replace text, links, pictures, and macros using the con tent editor.
Margins	The amount of space – in pixels – that appears outside the gadget. You can set top, bottom, left, and right margins separately.
Padding	(*Kaleidoscope themes only*) The amount of space – in pixels – that appears between the content of the gadget and the outer limits of the gadget. You can set top, bottom, left, and right padding separately. If you have set a fixed height for the gadget, the bottom padding will be ignored.
Advanced	Within the **Advanced** section, you can enter CSS code or classes to further control the appearance and behavior of the gadget. For more information, see Advanced gadget settings.

Changing colors and fonts

You can change the colors, text styles, and backgrounds used in your website from the Colors and styles screen.

Read more/less

For more advanced fine-tuning, you can use CSS customization and theme overrides.

For subscription form gadgets, you can modify the following elements from the Colors and styles screen:

To change...	modify...	under...
"Subscription form"	Form instructions H3	General formatting > Form (*Bookshelf, Building Blocks, Clean Lines, Dark Impact, Fiesta, Firma, Homestead, Kaleidoscope, Showcase, Skyline, Terra, Tinted Tiles, Treehouse, Whiteboard, and White Spaces themes*) General formatting or Typography
"Mandatory fields"	Form instructions Text/Normal	General formatting > Form (*Bookshelf, Building Blocks, Clean Lines, Dark Impact, Fiesta, Firma, Homestead, Kaleidoscope, Showcase, Skyline, Terra, Tinted Tiles, Treehouse, Whiteboard, and White Spaces themes*) General formatting or Typography
Labels	Text/Normal Labels	General formatting or Typography General formatting > Form
Back button	Text/Normal Link	General formatting or Typography
Subscribe button	Normal/Hover	Functional buttons (*Clean Lines, Dark Impact, Fiesta, White Space themes*)

Any changes you make will be applied to other gadgets that use the same settings.

On this page:

- Subscription form gadget settings
- Changing colors and fonts

Expand all sections

See also:

- How to insert a gadget

Multimedia gadgets

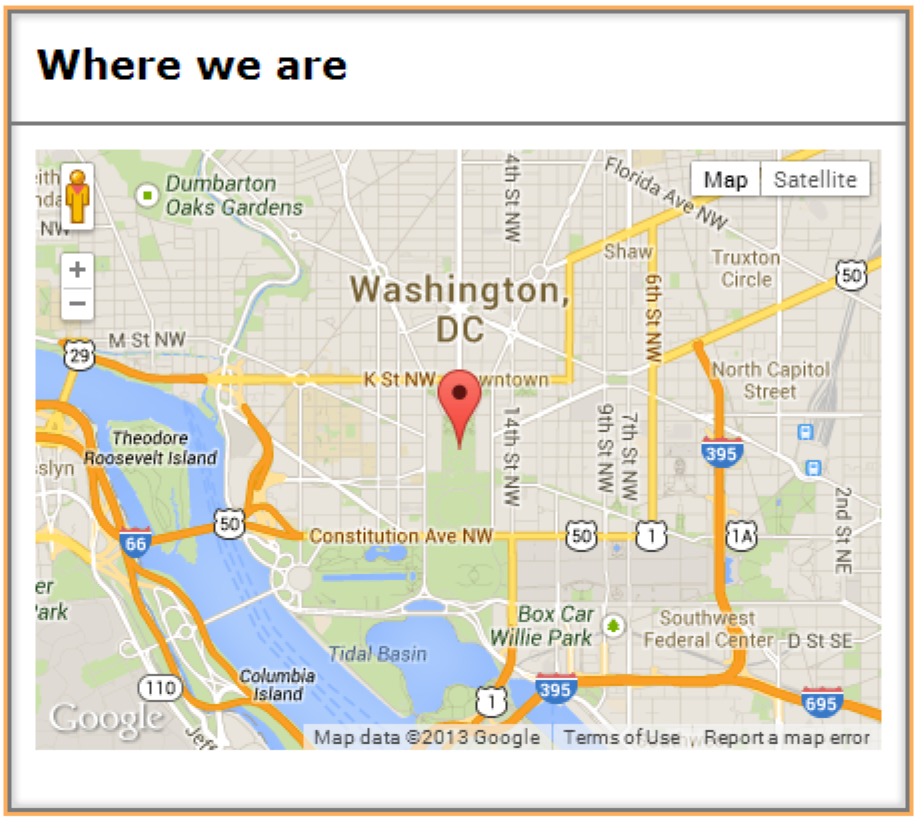
Multimedia gadgets

- Google map gadget
- Photo album gadget
- Slideshow gadget

Google map gadget

Google map gadget

Using the Google map gadget, you can insert an interactive Google map pinpointing a specific location. For example, you could indicate the location of your organization on your Contact Us page.



> Because of a change to Google's map API, Wild Apricot's Google map gadget does not currently work with custom domains – ones that do not use wildapricot.org or other Wild Apricot domains. To get around this problem, you can directly embed your Google map by copying and pasting embed code obtained from Google. For direction on obtaining the code, click here. For directions on pasting the embed code, click here.

You can insert the gadget into a page onto your site, or into a page template so that all pages that use that template will automatically display the gadget. For instructions on inserting, moving, and deleting gadgets, see Gadgets.

> There is a limit of 11 Google map gadgets per page. If you add more than that, the additional maps will not appear.

Other map options

Wild Apricot's Google map gadget does not display the address beside the marker, and cannot be clicked to display a larger map on the Google map site. If you need this functionality, you can embed a Google map directly without using the Wild Apricot gadget. Keep in mind, though, that embedded Google maps only work when accessing a site using *https* rather than *http*.

To embed an interactive map that can show where your members are located, and optionally, to provide contact information, you can embed a map from Zeemaps. For more information, see Adding interactive ZeeMaps.

Another mapping option – Apricot Maps – is being offered by a Wild Apricot service partner. Apricot Maps shows members on an interactive map and provides the ability to search by zip code or distance.

Google map gadget settings

Using the gadget's settings, you can control its appearance and behavior. Depending on the settings you choose, visitors to your site can zoom in or out, switch to street view, and choose between map and satellite views.

For instructions on displaying gadget settings, see Gadgets.

The following settings are available for Google map gadgets:

Setting	Description
Address	The address to be used as the initial focal point of the map.
Display gadget content as	Choose to whether to display the map as a dynamic map or a static image. A dynamic map includes controls for zooming, switching to street view, and choosing between map and satellite views. A static image is simply the map displayed as a picture.
Width	The width of the map, in pixels. You can only set the width if you have chosen to display a static image. If you choose to display a dynamic map, the map (and gadget) will occupy the full width of the layout cell in which it appears.
Height	The height of the map (and gadget), in pixels.
Zoom	The default zoom level. You can set the level anywhere from 1 (continent level) to 18 (building level). If you have chosen to display the map as a dynamic map, visitors can use the zoom controls to change the zoom level.
Gadget title	If you specify a gadget title, the title will appear specially formatted within the gadget. Depending on the gadget style you choose, the title may appear in a heading box. If you want to add a description under the title, do not enter a gadget title, but instead, create a content gadget with a title and description, and place the content gadget ahead of this gadget. For Kaleidoscope themes, use a Headline gadget instead of specifying a gadget title.
Gadget style	The gadget style determines the physical appearance of the gadget. The style you choose will determine the color and format of the gadget title, the gadget content, and the gadget border. You can choose from theme-specific styles and styles that are common to all themes.
Margins	The amount of space – in pixels – that appears outside the gadget. You can set top, bottom, left, and right margins separately.

Padding	(*Kaleidoscope themes only*) The amount of space – in pixels – that appears between the content of the gadget and the outer limits of the gadget. You can set top, bottom, left, and right padding separately. If you have set a fixed height for the gadget, the bottom padding will be ignored.
Advanced	Within the **Advanced** section, you can enter CSS code or classes to further control the appearance and behavior of the gadget. For more information, see Advanced gadget settings.

On this page:

- Other map options
- Google map gadget settings

See also:

- How to insert a gadget
- Adding interactive ZeeMaps

Photo album gadget

Photo album gadget

Using this gadget, you can add a photo album to a page on your Wild Apricot, so that visitors to your site can view a gallery of photos.

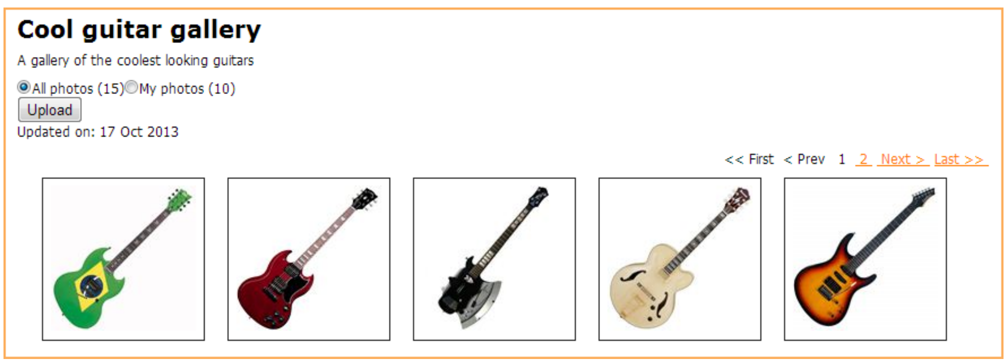


Photo album pages are different from member photo albums which appear on members' individual profiles.

You can control who can upload photos to the photo album, allowing all members to do so, or restricting uploading selected membership levels or just site administrators. Pictures can also be uploaded by administrators via WebDAV or the Files screen.

You can also display the images from a photo album in a slideshow gadget.

You cannot add a photo album gadget – or any other *singular gadget* – to a page template or system page, or to a page containing another singular gadget.

You can add as many photo albums as you want, with each album appearing on a separate page. Each album appears as a separate folder under SiteAlbums within your site's Resources folder.

For instructions on inserting, moving, and deleting gadgets, see Gadgets. Deleting a photo album gadget does not remove the corresponding album folder from the SiteAlbums folder.

For more information on setting up and using photo albums, see Photo albums.

Photo album gadget settings

Using the gadget's settings, you can control its appearance and content.

Read more/less

For instructions on displaying gadget settings, see Gadgets.

The following settings are available for photo album gadgets:

Setting	Description
Album name	The name of the photo album. This is the name that would appear when you are selecting a photo album to use as the basis for a slideshow gadget.
Photos per page	The maximum number of photos that appear on each photo album page. If there are more than the specified number of photos in the album, links will appear at the top-right and bottom-right of the page that you can use to scroll through the album pages.
Photos can be uploaded by	Choose the kind of members who can upload photos to the photo album. You can allow all members, administrators only, or selected membership levels. If you choose the **Selected membership levels** option, you then check the membership level(s) that you want to be able to upload photos.
Sort by	Controls the order in which photos are displayed in the album. Yo u can choose to display them by name or date added – the date the photo was uploaded to the album – in ascending or descending order.
Album information	This section displays identifying information for the album that administrators need to upload photos via the Files screen or via WebDAV. Before you can view the album information, you have to save the page on which the photo album gadget appears then refresh your browser (on most browsers: press the F5 key). For more information, see Uploading photos through File management or via WebDAV.
Gadget title	If you specify a gadget title, the title will appear specially formatted within the gadget. Depending on the gadget style you choose, the title may appear in a heading box.
Gadget style	The gadget style determines the physical appearance of the gadget. The style you choose will determine the color and format of the gadget title, the gadget content, and the gadget border. You can choose from theme-specific styles and styles that are common to all themes. For Kaleidoscope themes, use a Headline gadget inste ad of specifying a gadget title.
Margins	The amount of space – in pixels – that appears outside the gadget. You can set top, bottom, left, and right margins separately.
Padding	(*Kaleidoscope themes only*) The amount of space – in pixels – that appears between the content of the gadget and the outer limits of the gadget. You can set top, bottom, left, and right padding separately. If you have set a fixed height for the gadget, the bottom padding will be ignored.
Advanced	Within the **Advanced** section, you can enter CSS code or classes to further control the appearance and behavior of the gadget. For more information, see Advanced gadget settings.

Adding a description

You can add a description for your photo album by inserting a content gadget ahead of the photo album gadget. Within the content gadget, you can add a title and description, and format them using text styles. If you plan to add a title and description using a content gadget, be sure not to enter a gadget title as part of the photo album gadget settings. For more information on adding and formatting text, see Using the content editor.

Changing colors and fonts

You can change the colors, text styles, and backgrounds used in your website from the Colors and styles screen.

Read more/less

For more advanced fine-tuning, you can use CSS customization and theme overrides.

For photo album gadgets, you can modify the following elements from the Colors and styles screen:

To change...	modify...	under...
Gadget title	H4 Title	General formatting or Typography Gadgets or Gadget styles (*Blueprint, Clean Lines, Dark Impact, Fiesta, Firma, Kaleidoscope, Homestead, Showcase, Skyline, Terra, and White Space themes*)
Labels	Text/Normal	General formatting or Typography
Links	Text/Normal Link	General formatting or Typography

Any changes you make will be applied to other gadgets that use the same settings.

On this page:

- Photo album gadget settings
- Adding a description
- Changing colors and fonts

Expand all sections

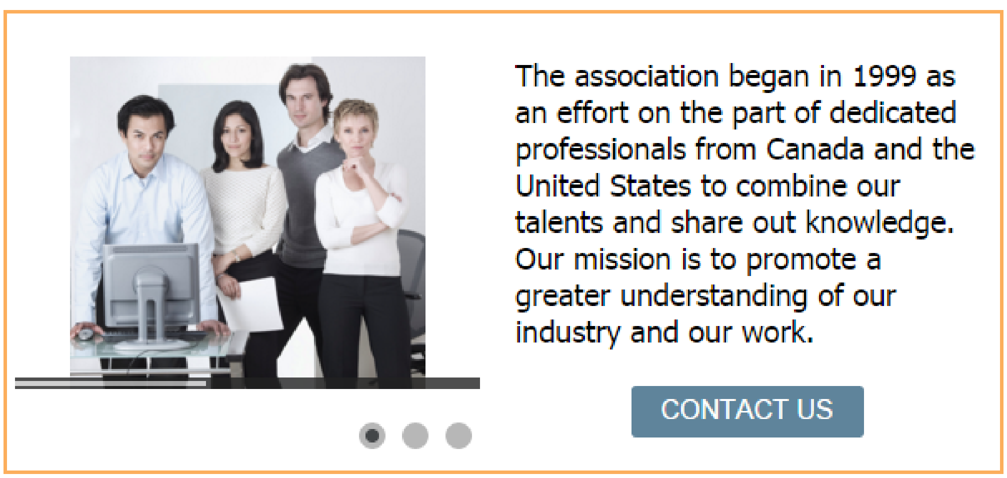
See also:

- How to insert a gadget
- Photo albums

Slideshow gadget

Slideshow gadget

Using the slideshow gadget, you can add an animated slideshow to your Wild Apricot site, displaying one image after another from a collection of images.



Depending on your settings, visitors to your site can view the images in order at the speed you have set, or they can scroll through the images at their own speed, and use the controls at the bottom of the slideshow to jump to a particular image.

You can separately link each image to a page on your site, an event, or an external page or email. You can also specify descriptions to appear along the bottom of each image.

You can insert a slideshow gadget into a page onto your site, or into a page template so that all pages that use that template will automatically display the gadget. You could, for example, add a slideshow to your page header to act as an animated header background. For instructions on inserting, moving, and deleting gadgets, see Gadgets.

You can also set up a slideshow using a 3rd-party jQuery plugin such as Nivo Slider. For more information, see Adding animated slideshows.

Slideshow gadget settings

Using the gadget's settings, you can control its appearance and content. For instructions on displaying gadget settings, see Gadgets.

The following settings are available for slideshow gadgets:

Setting	Description
Images to display	Choose the location of the images you want to display. You can display images from the current theme, from a particular folder in your Wild Apricot account, or from one or more photo album gadgets on your site. You cannot choose photo albums that appear on admin only pages. If you display images from a folder, the images will appear in order by file name. If you display images from a photo album gadget, they will appear in the order in which they were added to the photo album – from newest to oldest – unless you enable the **Randomize order** option (below). Any captions added to images in the photo album will automatically displayed along the bottom of the images.
Gallery layout	Controls the size and orientation of the slideshow. You can choose from **Landscape**, **Portrait**, **Square**, and **Fixed height** options. If you select **Fixed height**, you can specify the height of the slideshow in pixels.
Fit image to slideshow area	Controls whether images are expanded to fill the slideshow area. If this option is enabled, part of the image may be cropped. If this option is disabled, white bars may appear above or beside the image.
Display image	The number of seconds each image should be displayed.
Transition time	The number of milliseconds for the transition between images.
Transition effect	The effect used during the transition time to move from one image to another.
Randomize order	Check this option to display the slideshow images in random order.

Allow user to navigate through images	Determines whether controls appear along the side of the slideshow, allowing visitors to scroll through images at their own speed, and at the bottom, allowing visitors to jump to different images instead of viewing the images in order. 
Show countdown bar	Check this option to display a countdown bar showing how much longer the current image will be displayed. 

<table>
<tr><td>Add link to images</td><td>Click this button to link your slideshow images. On the dialog that appears, you can choose where each image should link to. The following options are available:
<table>
<tr><th>Option</th><th>Description</th><th>Next step</th></tr>
<tr><td>Event</td><td>Link to the detail page or registration form for one or your events.</td><td>Select the event from the list of past and upcoming events. Choose whether to link to the event's detail page or registration page.</td></tr>
<tr><td>Site page</td><td>Link to another page on your Wild Apricot site.</td><td>Select the page from the list.</td></tr>
<tr><td>Website/Email</td><td>Link to an email address or another website.</td><td>Enter the email address or website URL.</td></tr>
</table>
For each image, you can also specify a tooltip and choose whether you want the linked page to open in a new window or the same window.
You can also specify a description which will appear along the bottom of the image. If you are displaying images from a photo album, any captions already assigned to the images will be automatically loaded as default descriptions.


</td></tr>
<tr><td>Margins</td><td>The amount of space – in pixels – that appears outside the gadget. You can set top, bottom, left, and right margins separately.</td></tr>
<tr><td>Padding</td><td>(Kaleidoscope themes only) The amount of space – in pixels – that appears between the content of the gadget and the outer limits of the gadget. You can set top, bottom, left, and right padding separately. If you have set a fixed height for the gadget, the bottom padding will be ignored.</td></tr>
<tr><td>Gadget title</td><td>(Bookshelf and Whiteboard themes) If you specify a gadget title, the title will appear specially formatted within the gadget. Depending on the gadget style you choose, the title may appear in a heading box.
⚠ For Kaleidoscope themes, use a Headline gadget instead of specifying a gadget title. </td></tr>
</table>

Gadget style	(*Bookshelf and Whiteboard themes*) The gadget style determines the physical appearance of the gadget. The style you choose will determine the color and format of the gadget title, the gadget content, and the gadget border. You can choose from theme-specific styles and styles that are common to all themes.
Advanced	Within the **Advanced** section, you can enter CSS code or classes to further control the appearance and behavior of the gadget. For more information, see Advanced gadget settings.

See also:

- How to insert a gadget
- Adding animated slideshows

Navigational gadgets

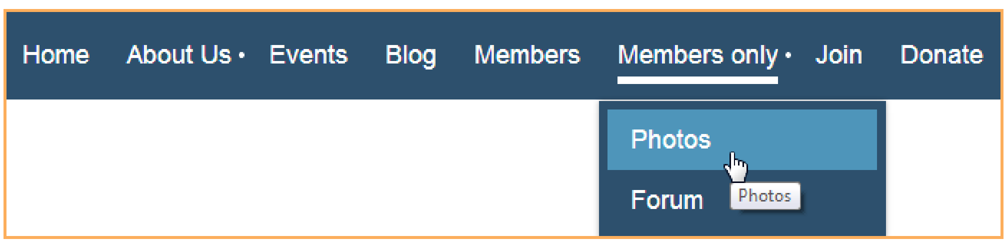
Navigational gadgets

- Menu gadget
- Breadcrumbs gadget
- Navigation links gadget
- Secondary menu gadget
- Sitemap gadget
- Site search gadget

Menu gadget

Menu gadget

Using a menu gadget, you can add a menu to provide links to site pages.



For some website themes – Treehouse, Clean Lines, White Space, and Dark Impact – both horizontal and vertical menu gadgets are available. For other themes, whether the menu is horizontal or vertical is determined by the theme.

Since navigation is a critical aspect of an effective website, you should include a menu on most (if not all) of your Wild Apricot pages. Menu gadgets are included by default on most page templates, so that pages based on the templates automatically display the menu. For instructions on inserting, moving, and deleting gadgets, see Gadgets.

You can control the order of menu options from the Site pages screen, and control whether a page appears in the menu from its page settings. You can customize the colors, text styles, and backgrounds used in menu gadgets from the Colors and styles screen.

Menu gadget settings

Using the gadget's settings, you can control its appearance and content.

Read more/less

For instructions on displaying gadget settings, see Gadgets.

The following settings are available for menu gadgets. Some settings are not available for all website themes.

Setting	Description

Pages to include	Choose the pages to be included in the menu. You can include all menu pages, only pages at the top level of the menu hierarchy, or only subpages under the parent of the currently displayed page. For example, if a visitor is viewing one of 3 subpages under the About Us page, then the **Subpages under top level parent page** option would display a menu consisting of the 3 subpages.
Gadget style	(*Not available for all themes*) Determines the physical appearance of the menu. For Terra and Firma themes, the Sticky style causes the menu to stick to the top of the page once it reaches the top of the browser.
Align	(*Building Blocks, Tinted Tiles only*) Controls the horizontal alignment of menu options within vertical menus.
Margins	The amount of space – in pixels – that appears outside the gadget. You can set top, bottom, left, and right margins separately.
Padding	(*Kaleidoscope themes only*) The amount of space – in pixels – that appears between the content of the gadget and the outer limits of the gadget. You can set top, bottom, left, and right padding separately. If you have set a fixed height for the gadget, the bottom padding will be ignored.
Advanced	Within the **Advanced** section, you can enter CSS code or classes to further control the appearance and behavior of the gadget. For more information, see Advanced gadget settings.

Changing colors and fonts

You can change the colors, text styles, and backgrounds used in your website from the Colors and styles screen.

Read more/less

For more advanced fine-tuning, you can use CSS customization and theme overrides.

For menu gadgets, you can modify the following elements from the Colors and styles screen:

To change...	modify...	under...	For...
Top-level menu items	Main/Normal	Menu Navigation gadgets >> Menu	Blueprint, Clean Lines, Dark Impact, Fiesta, Showcase, Skyline, Treehouse, White Space themes Firma, Terra themes
Drop-down menu items	Drop down	Menu Navigation gadgets >> Menu	Blueprint, Clean Lines, Dark Impact, Fiesta, Showcase, Showcase, Skyline, Treehouse, White Space themes Firma, Terra themes
Menu items	Item	Menu	Business Casual, Granite themes
Active menu items	Active item	Menu	Business Casual, Granite themes

Any changes you make will be applied to other gadgets that use the same settings.

Troubleshooting

- You can create as many levels of menu options as you wish, though older themes – those other than Blueprint, Bookshelf, Building Blocks, Clean Lines, Fiesta, Tinted Tiles, Treehouse, Whiteboard, White Space, and Dark Impact – may not proper display more than 3 menu levels.
- Menus within responsive themes will not display more than 3 menu levels on mobile devices.
- When using the White space website theme on low resolution displays, child menu items may not fit on the screen if the parent item already appears close to the right margin of the screen. To correct this problem, you can either move the parent item and its children further to the left, or you can add the following code to the CSS customization screen :

```
.WaGadgetMenuHorizontal .menuInner ul.firstLevel > li:nth-child(7) ul
{
 left: auto;
 right: 0;
}
.WaGadgetMenuHorizontal .menuInner ul.firstLevel > li:nth-child(7) ul ul
{
 left: auto;
 right: 100%;
}
```

  where both occurrences of the number 7 in the code should be replaced by a number indicating the parent item's position within the menu order. For example, the home page would be indicated by a value of 1, and the option to its right would be indicated by a value of 2.

On this page:

Expand all sections

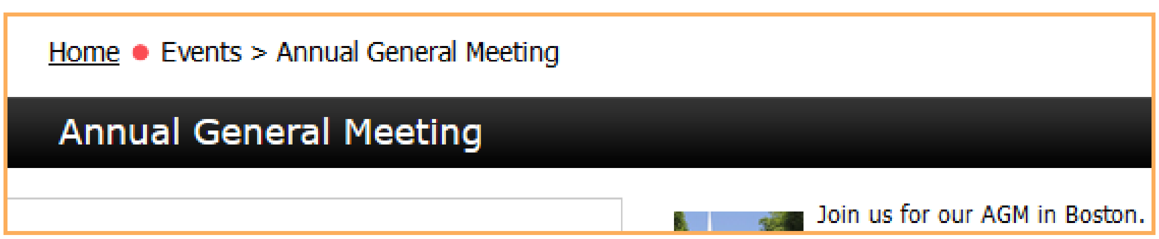
See also:

- How to insert a gadget
- Reordering and grouping menu pages
- Page visibility

Breadcrumbs gadget

Breadcrumbs gadget

The breadcrumbs gadget displays the visitor's current position within your site's menu hierarchy.



Each page in the menu hierarchy is displayed as a link that the visitor can click on to jump up to a higher level page.

The style of the links and the current page name is defined separately for each theme, and can be modified from the Colors and styles screen . You can also control the appearance of the gadget using advanced gadget settings such as **CSS class** and **Inline style**.

Since breadcrumbs are typically positioned below the site menu, you might consider including the breadcrumbs gadget on any templates where you have added a menu gadget. For instructions on inserting, moving, and deleting gadgets, see Gadgets.

Breadcrumbs gadget settings

Using the gadget's settings, you can control its appearance.

Read more/less

For instructions on displaying gadget settings, see Gadgets.

The following settings are available for breadcrumbs gadgets:

Setting	Description
Margins	The amount of space – in pixels – that appears outside the gadget. You can set top, bottom, left, and right margins separately.
Padding	(*Kaleidoscope themes only*) The amount of space – in pixels – that appears between the content of the gadget and the outer limits of the gadget. You can set top, bottom, left, and right padding separately. If you have set a fixed height for the gadget, the bottom padding will be ignored.
Advanced	Within the **Advanced** section, you can enter CSS code or classes to further control the appearance and behavior of the gadget. For more information, see Advanced gadget settings.

Changing colors and fonts

You can change the colors, text styles, and backgrounds used in your website from the Colors and styles screen.

Read more/less

For more advanced fine-tuning, you can use CSS customization and theme overrides.

For breadcrumb gadgets, you can modify the following elements from the Colors and styles screen:

To change...	modify...	under...	For...
Typeface of items	General	Breadcrumbs Navigation gadgets >> Breadcrumbs	All themes except Aurora, Glass, Keynote, Memo, Nature, and Notebook Firma, Terra themes
Color of links	Link	Breadcrumbs Navigation gadgets >> Breadcrumbs	All themes except Aurora, Glass, Keynote, Memo, Nature, and Notebook Firma, Terra themes
Color of current page	Current page	Breadcrumbs Navigation gadgets >> Breadcrumbs	All themes except Aurora, Glass, Keynote, Memo, Nature, and Notebook Firma, Terra themes

Any changes you make will be applied to other gadgets that use the same settings.

On this page:

- Breadcrumbs gadget settings
- Changing colors and fonts

Expand all sections

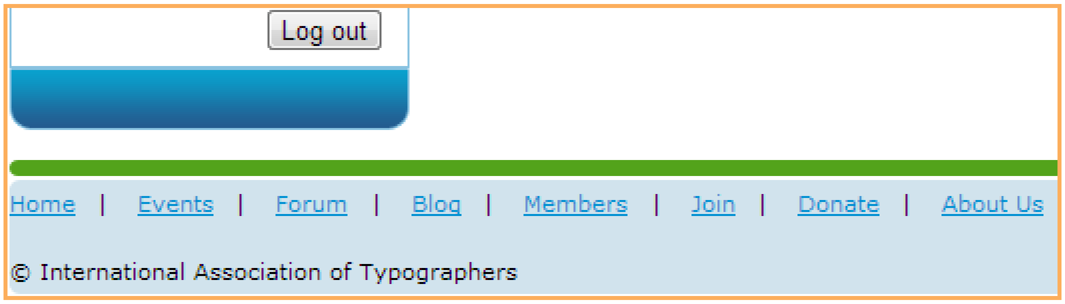
See also:

- How to insert a gadget

Navigation links gadget

Navigation links gadget

The navigation links gadget displays text links to selected site pages. Navigation links to important or frequently accessed pages are often included on a page footer .



You can insert the gadget into a page onto your site, or into a page template so that all pages that use that template will automatically display the gadget. For instructions on inserting, moving, and deleting gadgets, see Gadgets.

To display links to all pages within your site's menu, you can insert a sitemap gadget.

Navigation links gadget settings

Using the gadget's settings, you can control its appearance and content.

Read more/less

For instructions on displaying gadget settings, see Gadgets.

The following settings are available for navigation links gadgets:

Setting	Description
Pages to include	Choose the pages to display as links. You can link to all pages in your site menu, to pages in the top level of your menu, or only subpages of the currently displayed page.
Orientation	Controls whether the links are displayed horizontally or vertically.
Gadget title	If you specify a gadget title, the title will appear specially formatted within the gadget. Depending on the gadget style you choose, the title may appear in a heading box. For Kaleidoscope themes, use a Headline gadget inste ad of specifying a gadget title.
Gadget style	The gadget style determines the physical appearance of the gadget. The style you choose will determine the color and format of the gadget title, the gadget content, and the gadget border. You can choose from theme-specific styles and styles that are common to all themes.
Margins	The amount of space – in pixels – that appears outside the gadget. You can set top, bottom, left, and right margins separately.
Padding	(*Kaleidoscope themes only*) The amount of space – in pixels – that appears between the content of the gadget and the outer limits of the gadget. You can set top, bottom, left, and right padding separately. If you have set a fixed height for the gadget, the bottom padding will be ignored.
Advanced	Within the **Advanced** section, you can enter CSS code or classes to further control the appearance and behavior of the gadget. For more information, see Advanced gadget settings.

Changing colors and fonts

You can change the colors, text styles, and backgrounds used in your website from the Colors and styles screen.

Read more/less

For more advanced fine-tuning, you can use CSS customization and theme overrides.

For navigation links gadgets, you can modify the following elements from the Colors and styles screen:

To change...	modify...	under...	For...
Font color of links	Link	Navigational links Navigation gadgets >> Navigation links	Blueprint, Bookshelf, Fiesta, Showcase, Skyline, Treehouse, Whiteboard themes Firma, Terra themes
Font color of links on hover	Link on hover	Navigational links Navigation gadgets >> Navigation links	Blueprint, Bookshelf, Fiesta, Showcase, Skyline, Treehouse, Whiteboard themes Firma, Terra themes

Any changes you make will be applied to other gadgets that use the same settings.

On this page:

- Navigation links gadget settings
- Changing colors and fonts

Expand all sections

See also:

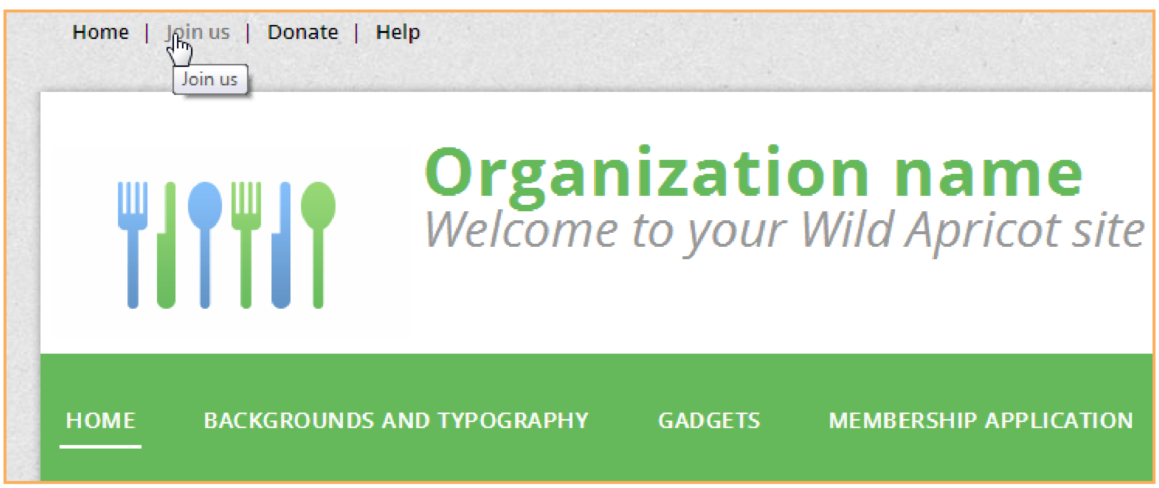
- How to insert a gadget

Secondary menu gadget

Secondary menu gadget

This gadget is only available when using a Bookshelf, Blueprint, Building Blocks, Fiesta, Firma, Homestead, Kaleidoscope, Showcase, Skyline, Terra, Tinted Tiles, or Whiteboard website theme.

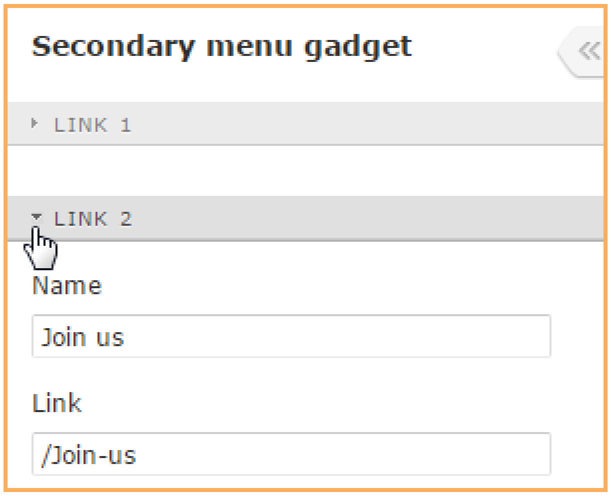
The secondary menu gadget allows you to create a menu consisting of internal or external links that supplements your main site menu. You can specify the link names and destinations, choose a vertical or horizontal orientation, and select from a list of menu styles.



You can insert the gadget into a page onto your site, or into a page template so that all pages that use that template will automatically display the gadget. For instructions on inserting, moving, and deleting gadgets, see Gadgets.

Specifying secondary menu links

You can specify up to 8 links to appear in a secondary menu. To specify a menu link, expand one of the **LINK** sections within the secondary menu gadget settings, then enter the link label in the **Name** field, and the destination URL for the link in the **Link** field.



If you want to link to a page on your Wild Apricot site, you can copy the page URL from the page settings .

Secondary menu gadget settings

Using the gadget's settings, you can control its appearance and content.

Read more/less

For instructions on displaying gadget settings, see Gadgets.

The following settings are available for secondary gadgets:

Setting	Description		
Name	For each link to be displayed within the secondary menu, you enter its display name.		
Link	For each link to be displayed within the secondary menu, you enter the destination URL. If you want to link to a page on your Wild Apricot site, you can copy the page URL from the page settings.		
Orientation	Controls whether the links are displayed horizontally or vertically.		
Align	(*Firma, Homestead, Terra themes*) Controls the horizontal alignment of the links.		
Gadget style	The gadget style determines the physical appearance of the gadget. The style you choose will determine the color and format of the links.		
Margins	The amount of space – in pixels – that appears outside the gadget. You can set top, bottom, left, and right margins separately.		

Padding	(*Kaleidoscope themes only*) The amount of space – in pixels – that appears between the content of the gadget and the outer limits of the gadget. You can set top, bottom, left, and right padding separately. If you have set a fixed height for the gadget, the bottom padding will be ignored.		
Advanced	Within the **Advanced** section, you can enter CSS code or classes to further control the appearance and behavior of the gadget. For more information, see Advanced gadget settings.		

Changing colors and fonts

You can change the colors, text styles, and backgrounds used in your website from the Colors and styles screen.

Read more/less

For more advanced fine-tuning, you can use CSS customization and theme overrides.

For secondary menu gadgets, you can modify the following elements from the Colors and styles screen:

To change...	modify...	under...	For...
Appearance of menu items	General	Menu >> Secondary menu	Terra, Showcase, Firma themes
Appearance of menu items when hovered over	Hover	Menu >> Secondary menu	Terra, Showcase, Firma themes

Any changes you make will be applied to other gadgets that use the same settings.

On this page:

- Specifying secondary menu links
- Secondary menu gadget settings
- Changing colors and fonts

Expand all sections

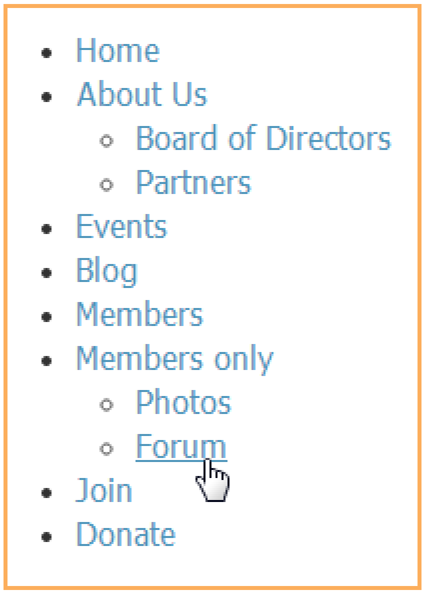
See also:

- How to insert a gadget
- Menu gadget

Sitemap gadget

Sitemap gadget

The sitemap gadget displays text links to all pages within your site's menu. The links are arranged vertically and formatted as bullets. Submenu options will appear indented below their parent options.



You can control whether a page appears in the menu (and thereby, the sitemap) from its page settings.

Typically, a sitemap is added to a dedicated sitemap page, which is linked to from page footers and/or your **Page not found** system page.

You can insert the gadget into a page onto your site, or into a page template so that all pages that use that template will automatically display the gadget. For instructions on inserting, moving, and deleting gadgets, see Gadgets.

If you want to display links to selected site pages – on a page footer, for example – you can insert a navigation links gadget.

Sitemap gadget settings

Using the gadget's settings, you can control its appearance.

Read more/less

For instructions on displaying gadget settings, see Gadgets.

The following settings are available for sitemap gadgets:

Setting	Description
Margins	The amount of space – in pixels – that appears outside the gadget. You can set top, bottom, left, and right margins separately.
Padding	(*Kaleidoscope themes only*) The amount of space – in pixels – that appears between the content of the gadget and the outer limits of the gadget. You can set top, bottom, left, and right padding separately. If you have set a fixed height for the gadget, the bottom padding will be ignored.
Advanced	Within the **Advanced** section, you can enter CSS code or classes to further control the appearance and behavior of the gadget. For more information, see Advanced gadget settings.

Changing colors and fonts

You can change the colors, text styles, and backgrounds used in your website from the Colors and styles screen.

Read more/less

For more advanced fine-tuning, you can use CSS customization and theme overrides.

For sitemap gadgets, you can modify the following elements from the Colors and styles screen:

To change...	modify...	under...	for...

Fonts	General	Navigation gadgets >> Sitemap	Firma, Showcase, Terra themes
Colors	Link	Navigation gadgets >> Sitemap	Firma, Showcase, Terra themes
Fonts and colors	Text or Link	General formatting or Typography	All other themes

Any changes you make will be applied to other gadgets that use the same settings.

On this page:

- Sitemap gadget settings
- Changing colors and fonts

Expand all sections

See also:

- How to insert a gadget

Site search gadget

Site search gadget

So that visitors can search your site, you can add a site search gadget to a page on your website. Typically, search boxes are added to a page template so that it automatically appears on all pages that use the template.

The search can encompass static site pages – including hidden and restricted pages – as well as dynamic content such as blogs, forums, events, and member profiles. The visitor can filter the search results – which are subject to the visitor's access permissions – and jump to any of the matching content.

> Site searches are only available to paid accounts.

From the site search gadget's settings, you can control the appearance and behavior of the search box, and set the default content to be searched. From the site search settings, administrators can control whether events, member profiles, and hidden pages – those not included in your site menu – are included in the search results.

For more information, see Site searches .

Adding a site search gadget

Since the site search gadget settings depend on the site search settings, you should review your site search settings before adding the site search gadget.

To add a search site box to a page on your site, follow these steps:

Read more/less

1. Go to **Sites pages** (under the **Website** menu) and create or begin editing the page or page template where you want the search box to appear.
2. Click the **Gadget** icon to display the list of available gadgets.
3. Drag the site search gadget from the list, and drop it where you want it to appear on the page. You can insert it into a section within a layout, above or below a layout, or above or below another gadget.

4. After you have dropped the gadget in the desired location, hover your pointer over it and click the **Settings** icon.
5. From the gadget settings panel on the left, choose the desired settings for your search box. For more information, see Site search gadget settings (below).
6. Click **Save** to save the changes to the page or page template.

Site search gadget settings

Using the gadget's settings, you can control its appearance and behavior.

Read more/less

To display the gadget settings, hover over the gadget and click the Settings icon.

The following settings are available for site search gadgets:

<table>
<tr><th>Setting</th><th>Description</th></tr>
<tr><td>Limit default search to specific content types</td><td>Controls the content types that are initially included in the search results. Visitors can enable or disable content types to filter the search results themselves. Events and member profiles will be included as options only if they are enabled within the site search settings.</td></tr>
<tr><td>Search prompt</td><td>The text that is displayed within the search box before the visitor enters a search string.</td></tr>
<tr><td>Show suggested matches</td><td>Controls whether suggested matches are displayed within the search box.

</td></tr>
<tr><td>Align</td><td>Controls whether the search box is left aligned, right aligned, or centered within the gadget.</td></tr>
</table>

Gadget title	If you specify a gadget title, the title will appear specially formatted within the gadget. Depending on the gadget style you choose, the title may appear in a heading box. For Kaleidoscope themes, use a Headline gadget inste ad of specifying a gadget title.
Gadget style	The gadget style determines the physical appearance of the gadget. The style you choose will determine the color and format of the gadget title, the gadget content, and the gadget border. You can choose from theme-specific styles and styles that are common to all themes.
Margins	The amount of space – in pixels – that appears outside the gadget. You can set top, bottom, left, and right margins separately.
Padding	(*Kaleidoscope themes only*) The amount of space – in pixels – that appears between the content of the gadget and the outer limits of the gadget. You can set top, bottom, left, and right padding separately. If you have set a fixed height for the gadget, the bottom padding will be ignored.
Advanced	Within the **Advanced** section, you can enter CSS code or classes to further control the appearance and behavior of the gadget. For more information, see Advanced gadget settings.

Changing colors and fonts

You can change the colors, text styles, and backgrounds used in your website from the Colors and styles screen.

Read more/less

For more advanced fine-tuning, you can use CSS customization and theme overrides.

For site search gadgets, you can modify the following elements from the Colors and styles screen:

To change...	modify...	under...
Gadget title	H4 Title	Getting formatting or Typography Gadgets or Gadget styles (*Blueprint, Fiesta, Firma, Showcase, Skyline, and Terra themes*)
Search prompt	Text	Getting formatting or Typography

Any changes you make will be applied to other gadgets that use the same settings.

On this page:

- Adding a site search gadget
- Site search gadget settings
- Changing colors and fonts

Expand all sections

See also:

- How to insert a gadget
- Site searches

Social gadgets

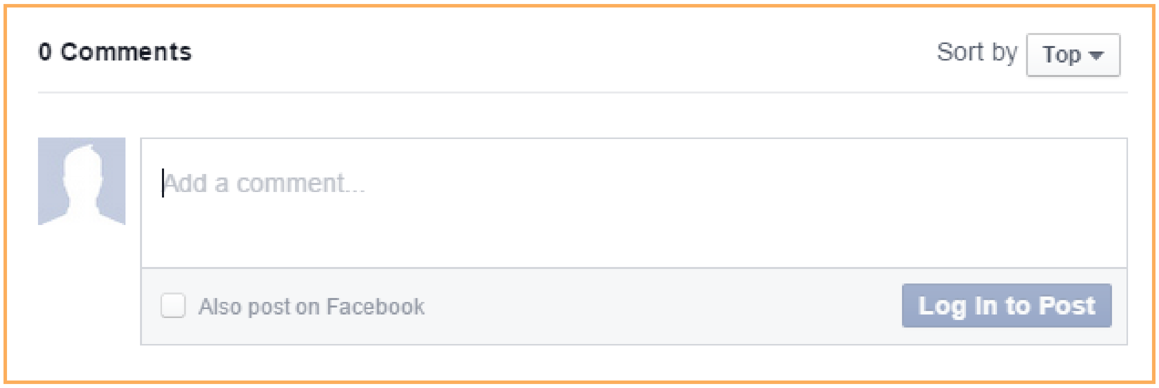
Social gadgets

- Facebook comments gadget
- Facebook page gadget
- Facebook Like box gadget
- Sharing buttons gadget
- Social profile gadget

Facebook comments gadget

Facebook comments gadget

Using this gadget, visitors can comment on your site page using their Facebook account, and optionally, post their comments to their Facebook walls. To post a comment, visitors have to log into their Facebook account.



You can insert the gadget into a page onto your site, or into a page template so that all pages that use that template will automatically display the gadget. For instructions on inserting, moving, and deleting gadgets, see Gadgets.

The Facebook comments gadget uses Facebook's Comments plugin.

Facebook comments gadget settings

Using the gadget's settings, you can control its appearance and content. For instructions on displaying gadget settings, see Gadgets.

The following settings are available for Facebook page gadgets:

Setting	Description
URL to comment on	The URL of the page you want visitors to be able to comment on. For the current page, leave this field blank.
Number of posts	The number of comments to be displayed.
Color scheme	The color scheme used by the gadget.
Margins	The amount of space – in pixels – that appears outside the gadget. You can set top, bottom, left, and right margins separately.
Advanced	Within the **Advanced** section, you can enter CSS code or classes to further control the appearance and behavior of the gadget. For more information, see Advanced gadget settings.

The Facebook comments gadget will occupy the full width of the placeholder or layout cell in which it appears.

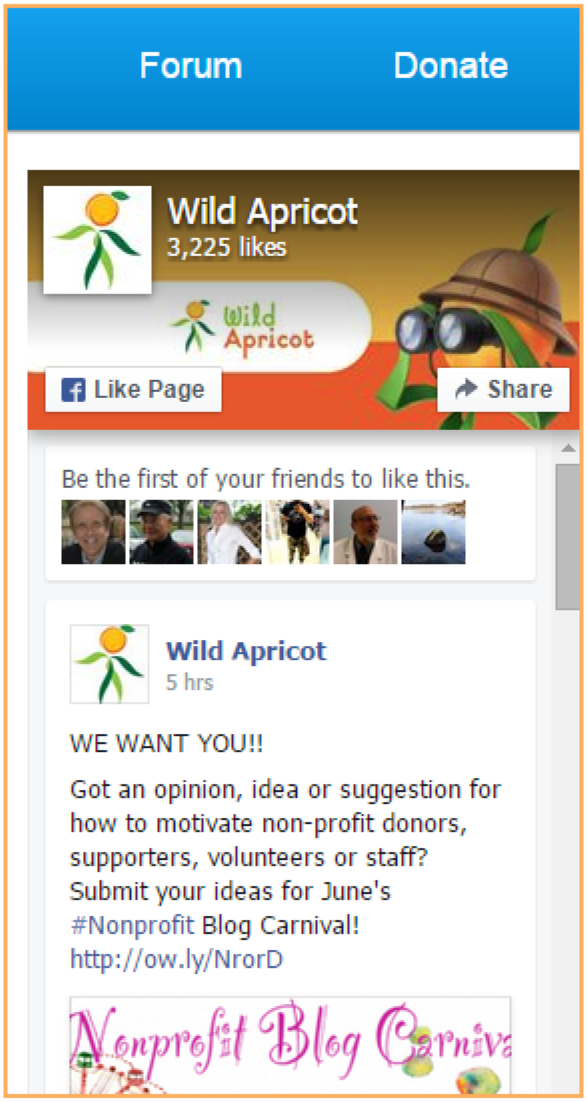
See also:

- How to insert a gadget
- Social profile gadgets
- Facebook page gadget

Facebook page gadget

Facebook page gadget

Using this gadget, you can embed any Facebook page on a Wild Apricot site page. Your visitors can like and share the page from your Wild Apricot site just as they would on Facebook.



You can insert the gadget into a page onto your site, or into a page template so that all pages that use that template will automatically display the gadget. For instructions on inserting, moving, and deleting gadgets, see Gadgets.

The Facebook page gadget uses Facebook's Page Plugin.

Facebook page gadget settings

Using the gadget's settings, you can control its appearance and content. For instructions on displaying gadget settings, see Gadgets.

The following settings are available for Facebook page gadgets:

Setting	Description
Facebook page URL	The URL of the Facebook page you want to embed. Do not enter the URL of a Facebook profile. For an explanation of the differences between a page and a profile, click here .
Show friend's face	Check this option to show the faces of friends who like the page.
Show page posts	Check to show posts from the page's timeline.
Width	The width of the gadget. The minimum width is 280 pixels and the maximum is 500 pixels.
Height	The height of the gadget. The minimum height is 130 pixels.

Margins	The amount of space – in pixels – that appears outside the gadget. You can set top, bottom, left, and right margins separately.
Padding	(*Kaleidoscope themes only*) The amount of space – in pixels – that appears between the content of the gadget and the outer limits of the gadget. You can set top, bottom, left, and right padding separately. If you have set a fixed height for the gadget, the bottom padding will be ignored.
Advanced	Within the **Advanced** section, you can enter CSS code or classes to further control the appearance and behavior of the gadget. For more information, see Advanced gadget settings.

See also:

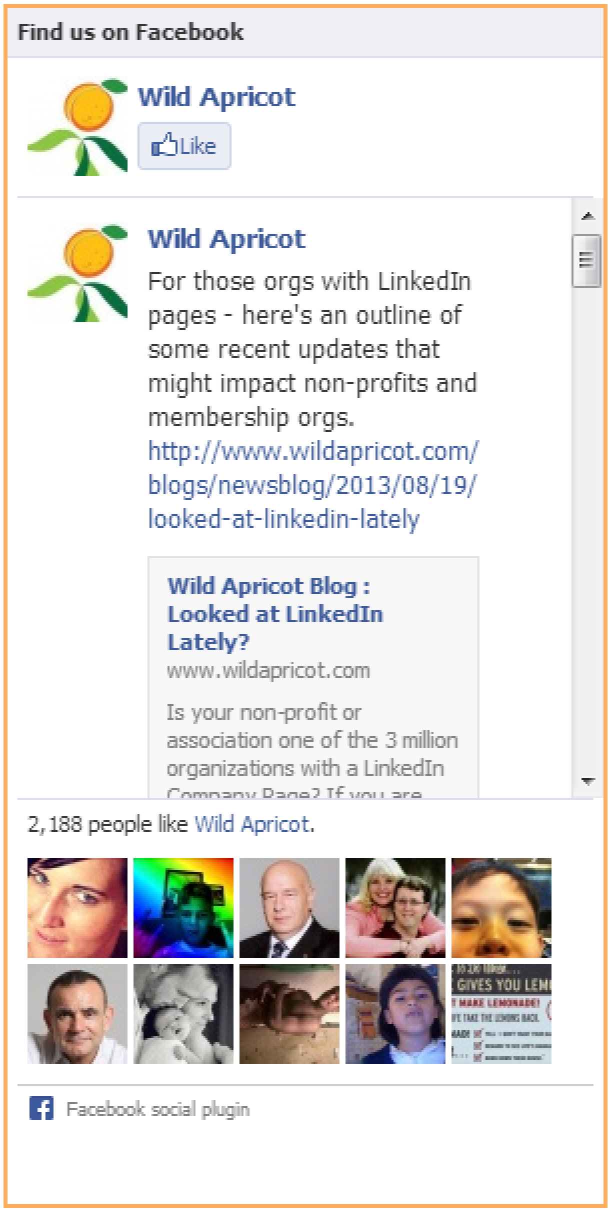
- How to insert a gadget
- Social profile gadgets
- Sharing buttons gadget

Facebook Like box gadget

Facebook Like box gadget

> Facebook is dropping its Like box plugin in favor of a new Facebook Page plugin on June 23rd. Consequently, we will be automatically – and immediately – switching all Facebook Like box gadgets on all Wild Apricot sites to a new Facebook page gadget. Your settings are automatically migrated to the new gadget.

Using this gadget, you can add a Facebook Like box to your page, which displays a Like button and the number of page likes. Depending on the gadget settings you choose, you can also display your profile stream, as well as profile photos for the Facebook users who like the page.



You can insert the gadget into a page onto your site, or into a page template so that all pages that use that template will automatically display the gadget. For instructions on inserting, moving, and deleting gadgets, see Gadgets.

Because this gadget uses third-party JavaScript code from Facebook, it cannot be previewed in edit mode. To view the gadget in action, you must save any changes to the page.

For more information on the Facebook Like box, see http://developers.facebook.com/docs/reference/plugins/like-box.

Facebook Like box gadget settings

Using the gadget's settings, you can control its appearance and content. For instructions on displaying gadget settings, see Gadgets.

The following settings are available for Facebook Like box gadgets:

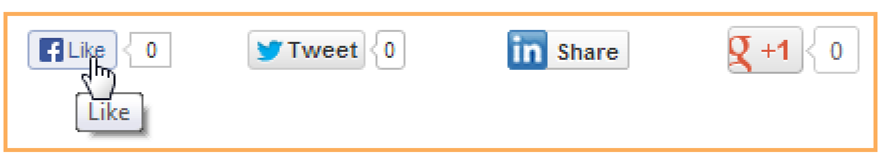
Setting	Description
Facebook page name	The name of the Facebook page to which the Like box applies – **not** your Facebook profile.
Show profile photos	Check this option to display profile photos for Facebook users who like the page.

Show profile stream	Check to display the profile stream for your public profile.
Show header	Check to show the *Find us on Facebook* bar at the top. The header only appears if either profile photos or the profile stream are displayed.
Color scheme	The color scheme for the Like box.
Width	The width of the Like box (in pixels). The minimum width is 183 pixels.
Height	The height of the Like Box. The minimum width is 63 pixels.
Margins	The amount of space – in pixels – that appears outside the gadget. You can set top, bottom, left, and right margins separately.
Padding	(*Kaleidoscope themes only*) The amount of space – in pixels – that appears between the content of the gadget and the outer limits of the gadget. You can set top, bottom, left, and right padding separately. If you have set a fixed height for the gadget, the bottom padding will be ignored.
Gadget title	If you specify a gadget title, the title will appear specially formatted within the gadget. Depending on the gadget style you choose, the title may appear in a heading box. For Kaleidoscope themes, use a Headline gadget instead of specifying a gadget title.
Gadget style	The gadget style determines the physical appearance of the gadget. The style you choose will determine the color and format of the gadget title, the gadget content, and the gadget border. You can choose from theme-specific styles and styles that are common to all themes.
Advanced	Within the **Advanced** section, you can enter CSS code or classes to further control the appearance and behavior of the gadget. For more information, see Advanced gadget settings.

Sharing buttons gadget

Sharing buttons gadget

Using this gadget, you can add buttons to a page on your Wild Apricot site that allow the visitor to like or share the page with one or more of their social networks.



You could, for example, add sharing buttons to the event details system page so that visitors can let others know about a particular upcoming event.

When visitors click on one of the sharing buttons, they will be prompted to log into the corresponding social network if they are not already logged in.

You can add buttons for the following social networks:

- Facebook
- Twitter
- LinkedIn
- Google+

In each case, you can modify the HTML code used to display the button. For example, you could modify the code for the Facebook Like button to change the layout, color scheme, or width.

You can insert the gadget into a page onto your site, or into a page template so that all pages that use that template will automatically display the gadget. For instructions on inserting, moving, and deleting gadgets, see Gadgets.

Because this gadget uses code from third-party sources, it cannot be previewed in edit mode. To view the gadget in action, you must save any changes to the page.

Sharing buttons gadget settings

Using the gadget's settings, you can control its appearance and content. For instructions on displaying gadget settings, see Gadgets.

The following settings are available for sharing buttons gadgets:

Setting	Description
Buttons to be displayed	Select the social networks that you want to display sharing buttons for. To modify the button code in each case, click the **Edit HTML** link beside the name of the social network.
Orientation	Choose whether to display the buttons horizontally or vertically.
Gadget title	If you specify a gadget title, the title will appear specially formatted within the gadget. Depending on the gadget style you choose, the title may appear in a heading box. For Kaleidoscope themes, use a Headline gadget instead of specifying a gadget title.
Gadget style	The gadget style determines the physical appearance of the gadget. The style you choose will determine the color and format of the gadget title, the gadget content, and the gadget border. You can choose from theme-specific styles and styles that are common to all themes.
Margins	The amount of space – in pixels – that appears outside the gadget. You can set top, bottom, left, and right margins separately.
Padding	(*Kaleidoscope themes only*) The amount of space – in pixels – that appears between the content of the gadget and the outer limits of the gadget. You can set top, bottom, left, and right padding separately. If you have set a fixed height for the gadget, the bottom padding will be ignored.
Advanced	Within the **Advanced** section, you can enter CSS code or classes to further control the appearance and behavior of the gadget. For more information, see Advanced gadget settings.

See also:

- How to insert a gadget
- Social profile gadget
- Facebook Like box gadget

Social profile gadget

Social profile gadget

Using this gadget, you can add icons that link to your profile on a number of popular social networks.

The style of the icons depends on the current website theme unless you choose the **Default icons** gadget style (which displays the standard icon for each social network).

You can insert the gadget into a page onto your site, or into a page template so that all pages that use that template will automatically display the gadget. For instructions on inserting, moving, and deleting gadgets, see Gadgets.

You can add icons for the following social networks:

- Facebook
- Twitter
- LinkedIn
- Google+
- YouTube
- Instagram
- Pinterest

You can also use theme overrides to add options to link to other social networks.

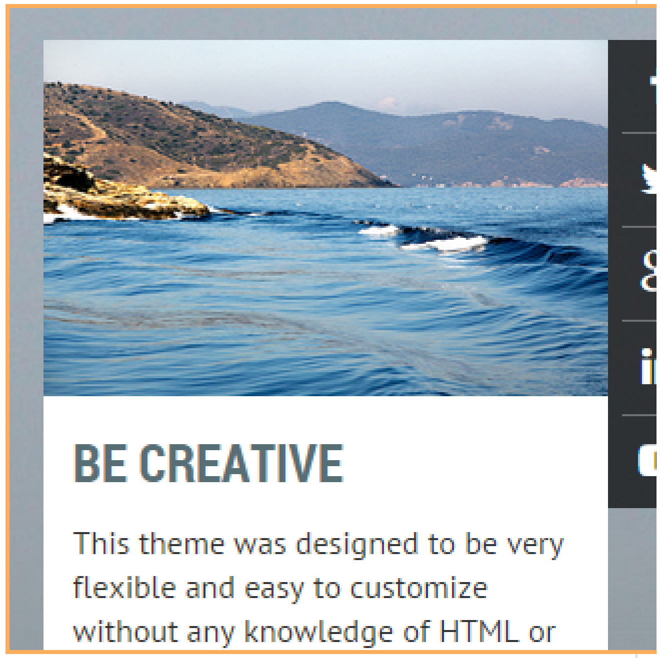
Social profile gadget settings

Using the gadget's settings, you can control its appearance and content.
Read more/less

For instructions on displaying gadget settings, see Gadgets.

The following settings are available for social profile gadgets:

Setting	Description
General	Enter your social profile name or a link to your profile for each social network you want to display icons for. If you don't want to display icons for a particular social network, leave its field blank.
Align	(*Clean Lines, Dark Impact, Treehouse, and White Space themes*) Controls whether the icons are left aligned, right aligned, or centered within the gadget.

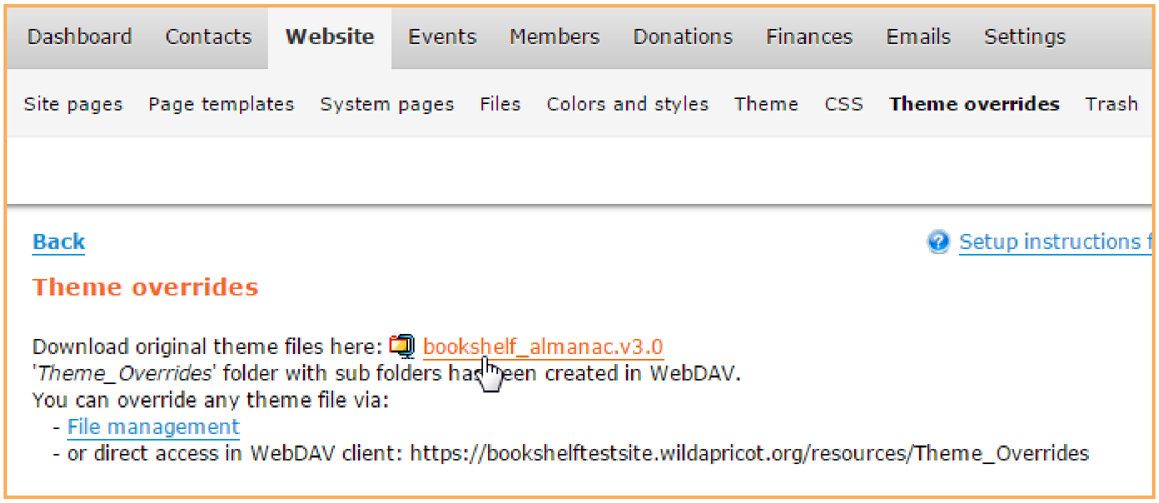
Fixed position	(*Terra and Firma themes*) Allows your social icons to appear on the outer right edge of the placeholder and remain in position as the viewer scrolls the page. 
Orientation	Choose whether to display the icons horizontally or vertically.
Gadget title	If you specify a gadget title, the title will appear specially formatted within the gadget. Depending on the gadget style you choose, the title may appear in a heading box. For Kaleidoscope themes, use a Headline gadget inste ad of specifying a gadget title.
Gadget style	The gadget style determines the physical appearance of the gadget. The style you choose will determine the color and format of the gadget title, the gadget content, and the gadget border. You can choose from theme-specific styles and styles that are common to all themes. The **Default icons** style displays the standard icons for each social network (instead of Wild Apricot's stylized icons).
Margins	The amount of space – in pixels – that appears outside the gadget. You can set top, bottom, left, and right margins separately.
Padding	(*Kaleidoscope themes only*) The amount of space – in pixels – that appears between the content of the gadget and the outer limits of the gadget. You can set top, bottom, left, and right padding separately. If you have set a fixed height for the gadget, the bottom padding will be ignored.
Advanced	Within the **Advanced** section, you can enter CSS code or classes to further control the appearance and behavior of the gadget. For more information, see Advanced gadget settings.

Adding other social networks

Using theme overrides, you can add options to link to additional social networks, like Spotify or Soundcloud, for example. To add options to link to additional social networks, follow these steps:

Read more/less

1. Under the **Website** menu, click the **Theme overrides** option.
2. From the **Theme overrides** screen, click the **Activate theme overrides** button.
3. Click the link to download the theme files.



   You can download the theme files (stored in a zip file) to any location you choose.

4. Unzip the theme files to a location of your choice on your computer or network.
5. Within your downloaded file structure, locate the **\Gadgets\SocialProfile\Images** folder. If the folder doesn't already exist, create it.
6. In the **Images** folder, add a graphic to represent the social network you want to link to. Most social network provide icons in a variety of sizes and styles on their sites. Soundcloud icons, for example, can be found here. For best results, use a PNG file with a transparent background.
7. Within the **\Gadgets\SocialProfile** folder, open the **Settings.cfg** file using any text editor.
8. Copy one of the existing <Setting> entries, and change the name of the social network within the **name** and **title** tags. In the following example, we've change them to Soundcloud:

```
<Setting name="SoundcloudLink" type="string" unencoded="1"
defaultViewType="TextBox" title="Soundcloud" initialValue="" />
```

9. Within the **\Gadgets\SocialProfile** folder, open the **SettingsLayout.cfg** file for editing.
10. Add a new Control entry within the General section, using the setting name you use in the Settings.cfg file. For Soundcloud, it would look like this:

```
<Control settingName="SoundcloudLink"/>
```

11. Within the **\Gadgets\SocialProfile** folder, open the **GadgetTemplate.tpl** file for editing.
12. For Blueprint, Bookshelf, Fiesta, and Whiteboard themes, add the following IF statement under Model.Settings.Layout, where *S oundcloud* can be replaced by whatever social network you are linking to:

```
<$if (Model.Settings.SoundcloudLink!="")$>
 <li>
    <a href="<$Model.Settings.SoundcloudLink$>" title="Soundcloud"
class="Soundcloud" target="_blank"></a>
 </li>
<$endif$>
```

For all other themes, use the following code :

```
<$if (Model.Settings.SoundcloudLink!="")$>
 <li>
 <a href="<$Model.Settings.SoundcloudLink$>" title="SoundcloudLink"
class="Soundcloud" target="_blank"><img height="32" width="32"
src="<$PageModel.BaseUrl$>/Gadgets/SocialProfile/Images/soundcloud.png"
/></a>
 </li>
<$endif$>
```

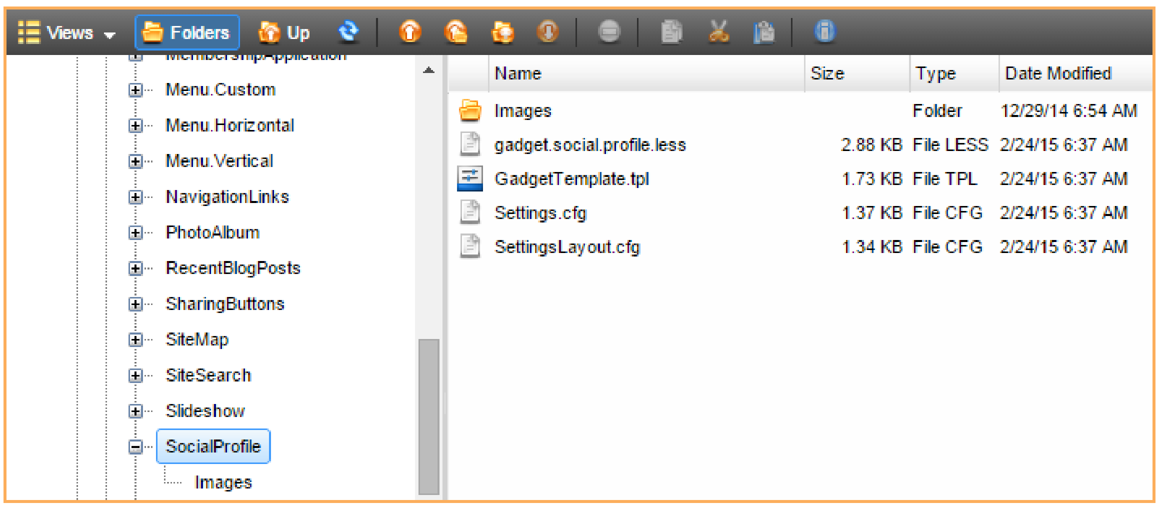
where *Soundcloud* is replaced by whatever social network you are linking to, *soundcloud.png* is replaced by the name of your graphic file, and the *height* and *width* values are set to those of your graphic.

13. For Blueprint, Bookshelf, Fiesta, and Whiteboard themes, open the **gadget.social.profile.less** file within the **\Gadgets\SocialProfile** folder, and add the following code at the very end:

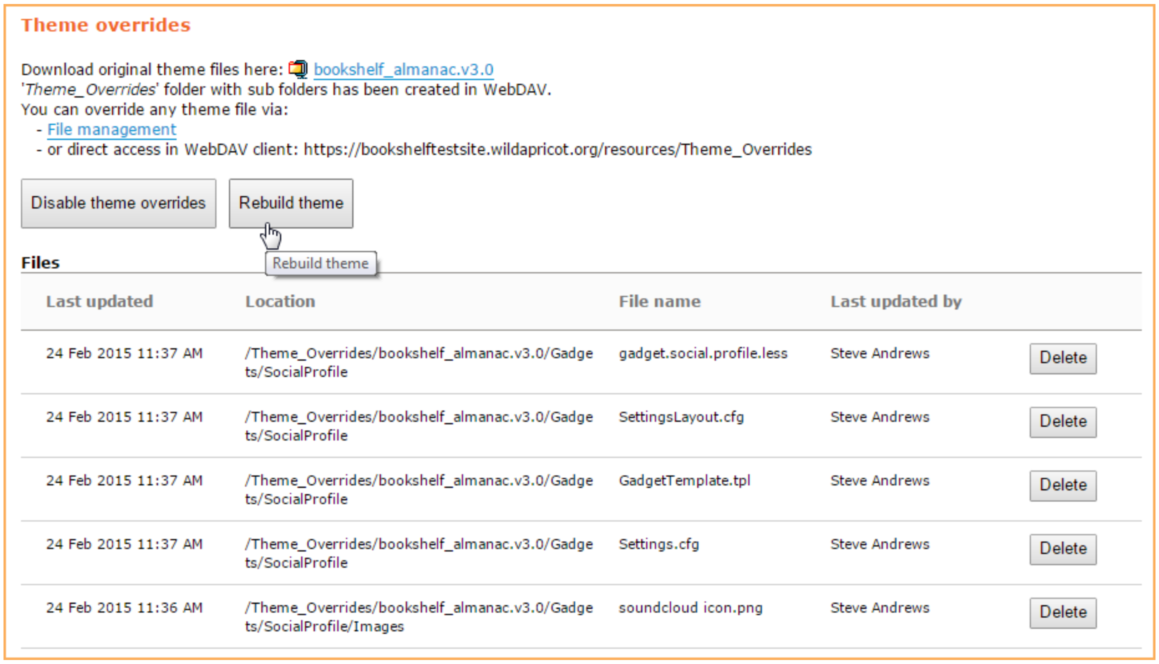
```
.WaGadgetSocialProfile ul li a.Soundcloud
{
background-image:
url("<$StaticModel.ThemeUrl$>/Gadgets/SocialProfile/Images/soundcloud.png")
;
height: 32px;
width: 32px;
}
```

where *Soundcloud* is replaced by whatever social network you are linking to, *soundcloud.png* is replaced by the name of your graphic file, and the *height* and *width* values are set to those of your graphic.

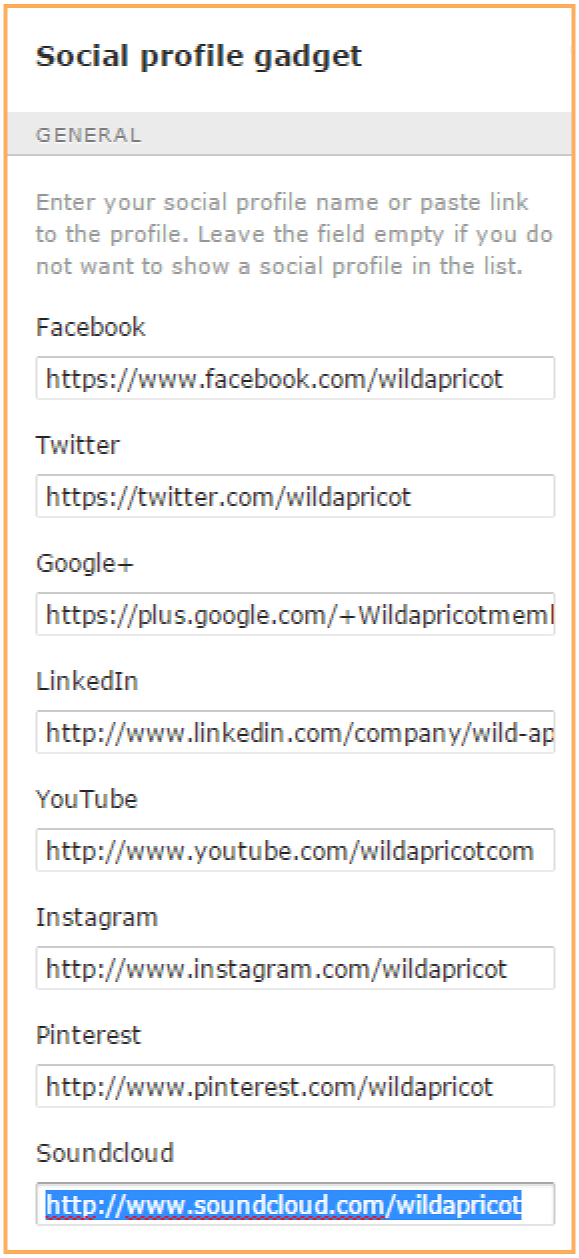
14. Save the changes you made to these theme files.
15. From the File management screen in Wild Apricot, or using WebDAV, upload the modified files to the corresponding theme folder on your site .



16. Go to the **Theme overrides** screen and click the **Rebuild theme** button.



Now, the new social network option should appear within the social profile gadget settings.



You may need to log off and back on again to view the new option.

Once you enter a URL for the new social network, the icon you added will be used as the link to your network profile.

On this page:

- Social profile gadget settings
- Adding other social networks

Expand all sections

See also:

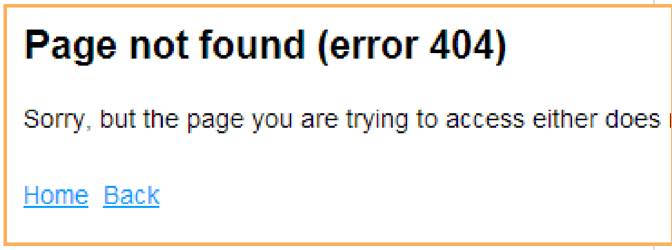
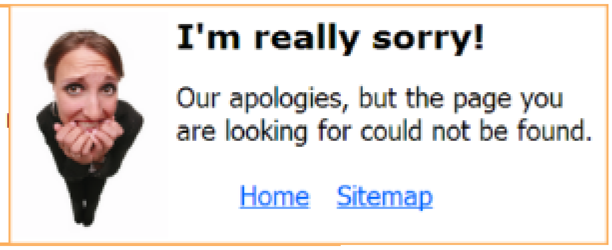
- How to insert a gadget
- Facebook Like box gadget
- Sharing buttons gadget

System pages

System pages

System pages are pages that are automatically displayed by Wild Apricot, or by the gadgets that appear on your site pages. They perform routine functions such as authentication and event registration.

You can customize system pages by adding gadgets to the page, or modifying existing content gadgets. For example, you can customize the event details page with side columns or gadgets such as the upcoming events gadget. Or, you could make the **Page not found** error page a little more interesting, and add a link to your sitemap.

Standard page	Customized page
	

Like site pages, system pages are based on page templates, and can contain layouts and gadgets. You can view and restore previous versions of system pages.

System pages do not appear on your site menu, and cannot be deleted.

Available system pages

The following system pages are available:
Read more/less

System page	Description
Access denied (403)	Error page displayed when access to the requested page is denied.
Add member to bundle	Form to add member to membership bundle.
Anonymous payment profile	Form to allow existing contact to make a payment (e.g. event registration fee) without logging in.
Authorization required	Login message and form to access restricted page.
Blog post	Form to add, edit, and view blog posts.
Change password	Form for logged in user to change password.
Contact profile	Contact profile as it appears to the contact ("My Profile").
Email member	Form to email member from member directory profile.
Event details	Displays event details and registration options for individual events.
Event registration	Form to register for a particular event.
Financial document	Displays details of an invoice, payment, refund, or donation within the **Invoices and payments** screen of a contact's profile.

Forum topic	Form to create, view, and reply to forum topics.
Member public profile	Member profile as it appears to others.
Membership level change	Form for member to switch to a different membership level.
Membership renewal	Form for member to renew membership.
Page not found (404)	Error page displayed when requested page does not exist or is not available. This page is not displayed if the website itself is not found, or has been suspended.
Reset password	Form accessible via email link to change password.
Reset password request	Form to request email containing reset password link.
Site search results	Results from a site search.
Terms of use	Terms, rules, or contractual conditions to be accepted before logging in.
Unsubscribe from emails	Form to confirm request to unsubscribe from emails.

Singular gadgets – those that cannot be combined with other singular gadgets on the same page – are not available when modifying system pages. The following is a list of singular gadgets:

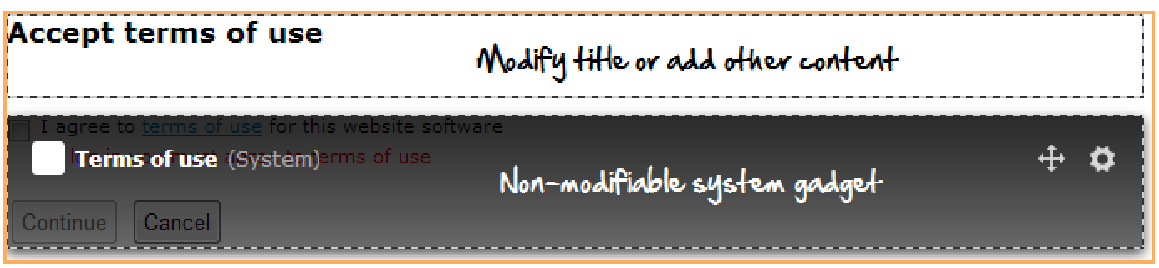
- Blog
- Discussion forum
- Donation form
- Event calendar
- Forum summary
- Membership application
- Member directory
- Photo album
- Subscription form

Modifying system pages

You can modify system pages as you would edit individual web pages. Within each system page, you can divide the page into sections by adding layouts, and insert gadgets to perform specialized functions or display custom content.

Read more/less

Each system page includes a system gadget that performs a critical function. You cannot directly modify or delete the system gadget, but you can modify or insert other gadgets on the system page. For example, when modifying the **Terms of use** system page, you can change the title and add text or other content, but you cannot directly modify the **Terms of use** system gadget.



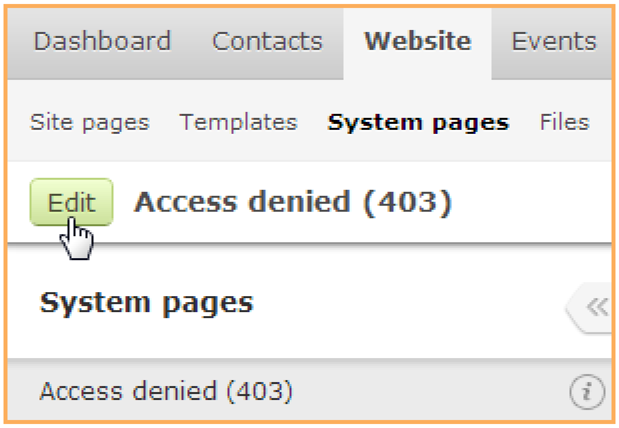
You can, however, control certain settings for system gadgets, including its CSS class or inline style.

Also, you can move the system gadget within the page, and place it within another layout cell. For example, when modifying the **Event details** system page, you can move the system gadget into a two-column layout, and add an upcoming events widget to the other column.

To modify a system page, follow these steps:

1. Hover over the **Website** menu and select the **System pages** option.
2. Within the list of system pages on the left, click the page you want to modify. The page will appear on the right.

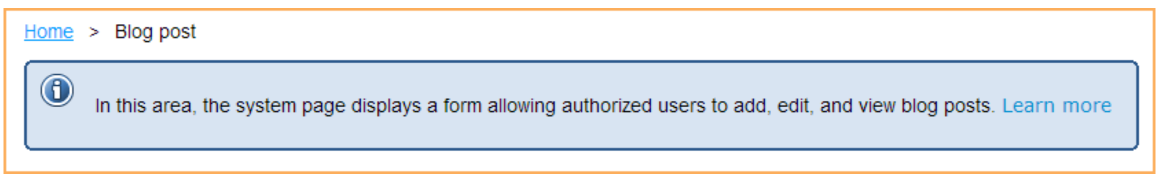
3. Click the **Edit** button.



4. Now, you can modify the page settings in the panel on the left, or click the **Gadget** or **Layout** icons to insert gadgets and layouts. You can modify the settings of existing layouts or gadgets by hovering over the layout or gadget and clicking the Settings icon. If the system page includes a content gadget, you can click the gadget then use the options appearing on the content editor toolbar to insert or modify text, graphics, links, and other elements. For more information, see Using the content editor.
5. When you are finished modifying the system page, click the **Save** button.

Modifying system pages displaying blue boxes

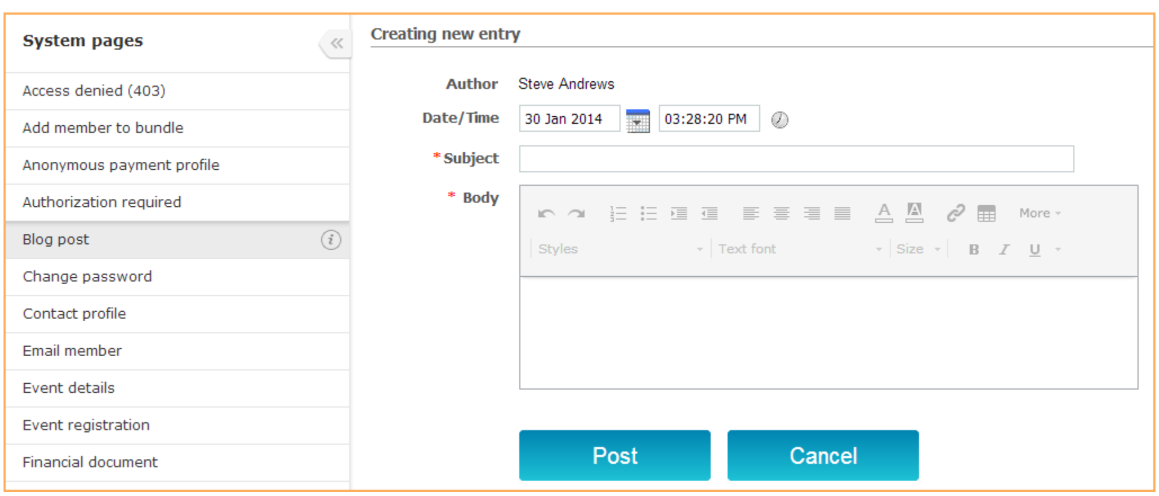
If a system page is unable to display its content – for example, an event details page whose content would vary depending on the event – it will instead display a blue box with an explanation of the kind of the content the page would normally display.



You can add your own content above, below, or beside the blue box, but take care not to add content – such as a title – that is already displayed by the system gadget.

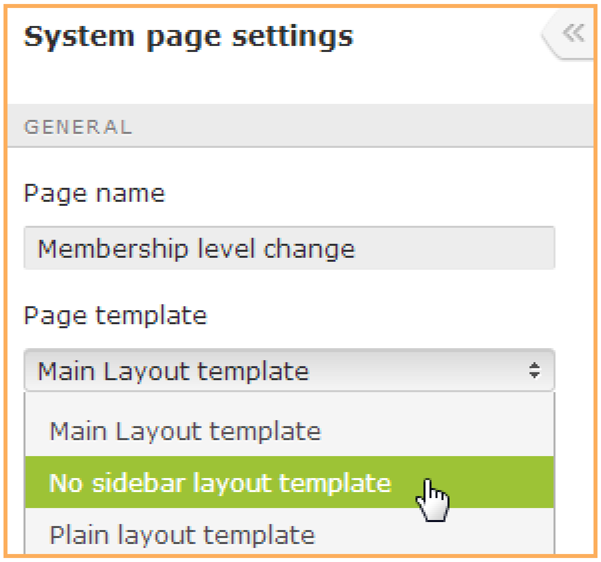
Some system pages may display a blue box in place of content depending on the type of administrator who is currently logged in. For example, the *Add member to bundle* system page will display a blue box if the administrator is not a bundle administrator. Similarly, the *E mail member* and *Member public profile* system pages will display blue boxes if the administrator doesn't have a public profile.

If you want to modify a system page while seeing actual data in place of the blue box, you can go to **Site pages** (under the **Website** men u) and click the appropriate menu option within the page preview to display the page containing the system page. For example, to see actual content while modifying the **Blog post** system page, display a page with a blog gadget then click the **Add post** button. You can now modify the system page with a better idea of how it will really look.



Changing the page template

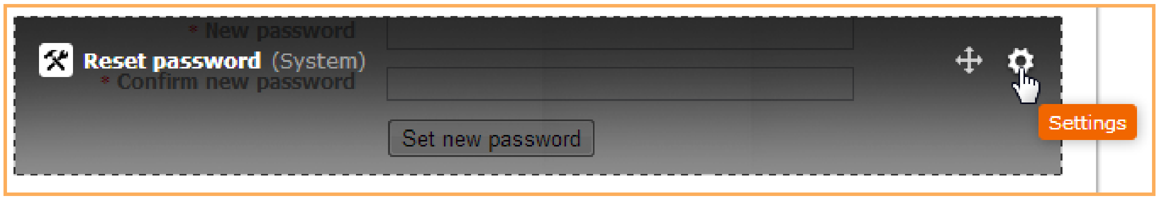
Like site pages, system pages are based on page templates. Within the page settings that appear when you begin modifying a system page, you can choose a different page template from the **Page template** drop-down list.



System gadget settings

Using the system gadget's settings, you can control its appearance. To display the system gadget settings, position your pointer over the system gadget then click the settings icon.

Read more/less



Within the **Advanced** section, you can enter CSS code or classes to further control the appearance and behavior of a gadget. You can also use CSS in the same way to control the appearance of layouts and placeholders. To display the advanced settings, click the triangle beside the **Advanced** heading.

The following advanced settings are available for system gadgets:

Setting	Description
HTML ID	A unique identifier by which the gadget can be referenced within custom CSS or JavaScript code. The identifier is automatically generated but can be replaced with a more readable or memorable one (e.g. My404Gadget).

CSS class	The name of a CSS class defined on the CSS customization screen. You could, for example, enter the name *myClass*, where code similar to the following has been entered on the CSS customization screen:
	`.myClass .artBoxTitle {`
	`  font-family: georgia;`
	`  text-shadow: 1px 2px 1px rgba(0,0,0,0.6);`
	`}`

Inline style	CSS code to control the behavior or appearance of the gadget. For example, you could enter *width: 250px;* to control the gadget width.

Customizing system pages (3:46)

On this page:

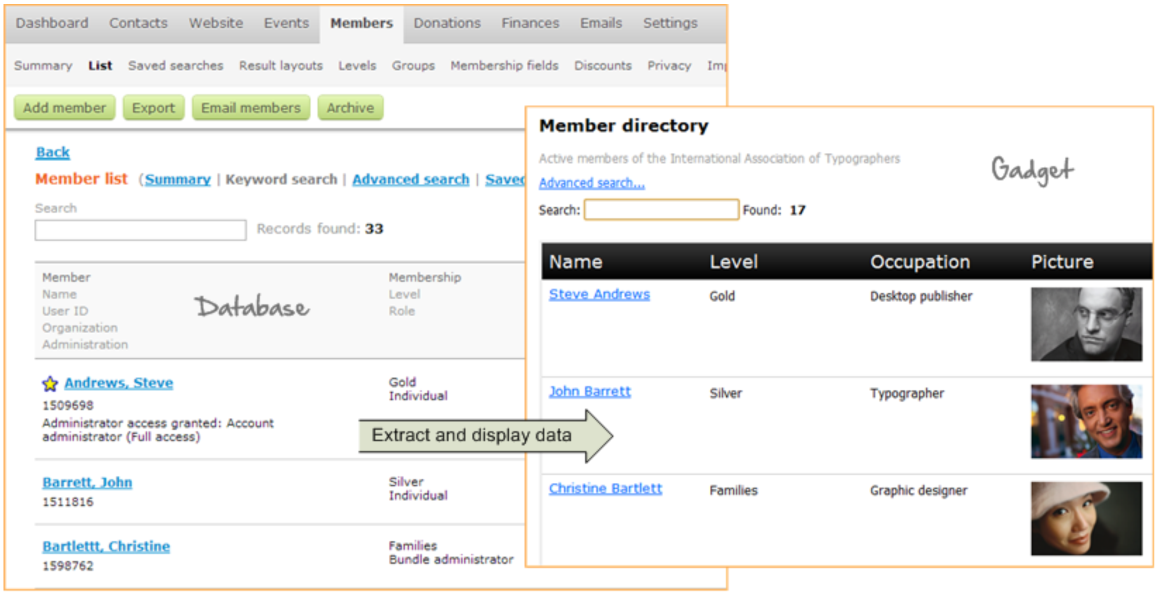
- Available system pages
- Modifying system pages
- Changing the page template
- System gadget settings

Expand all sections

Adding dynamic content

Adding dynamic content

Dynamic content is content that is extracted from your Wild Apricot database – such as event calendars, member directories, and discussion forums...



...or forms that are used to update information in your Wild Apricot database – such as membership application forms or donation forms.

Dynamic content is distinguished from custom content that you add yourself using the content editor.

Dynamic content can be added to a site page or page template. Adding dynamic content involves inserting a gadget – other than a content gadget.

Controlling the content

Within dynamic gadgets, content is automatically retrieved and displayed. For example, the information displayed by a member directory gadget is extracted from your Wild Apricot database and displayed subject to any restrictions you have set. The appearance and behavior of the gadget can be controlled using the gadget's settings, but the actual content of the gadget is automatically rendered.

For some gadgets, the visibility of the data being displayed can be restricted to certain type of members. For all gadgets, access to the page on which the gadget appears can be controlled using the page settings.

In some cases, the content of a dynamic gadget can be affected by settings other than the gadget settings. For example, whether events appear on an event calendar gadget depend on the event detail settings for each event. Where a dynamic gadget displays a form – such as a membership application gadget – the fields that appear on the form will be drawn from the fields in your Wild Apricot database. Membership application forms will display both common fields and membership fields. You can customize the content of these forms by adding, removing, and modifying the fields in your Wild Apricot database.

Dynamic gadgets can also be affected by the settings of other related gadgets. For example, the forum categories that are used to group multiple forums within a forum summary gadget are set within the forum gadget's settings.

Adding a heading and description

Most gadgets allow you to add a title or heading to the gadget as part of the gadget settings. Some gadgets also allow you to add a description. For gadgets that do not allow you to add a description, you can add one of your own by inserting a content gadget ahead of the dynamic gadget. Within the content gadget, you can add a title and description, and format them using text styles. If you plan to add a title and description using a content gadget, be sure not to enter a gadget title as part of the dynamic gadget's settings. For more information on adding and formatting text to content gadgets, see Using the content editor.

On this page:

- Controlling the content
- Adding a heading and description

Expand all sections

See also:

- Blogs
- Discussion forums

- Membership application form
- Member directory
- Member contact form
- Donation forms
- Photo albums
- Adding animated slideshows
- Email subscription form
- Adding field instructions
- Site searches

Blogs

Setting up and using blogs

You can add a blog to a page on your Wild Apricot site to provide timely updates and information to your membership.

Blogs – like other site content – are inserted as gadgets, in this case, a blog gadget. You cannot add a blog gadget – or any other singular gadget – to a page template or system page, or to a page containing another singular gadget.

> ⓘ You can embed a Wild Apricot blog on another website using widgets.

You can also insert a recent blog posts gadget to display a list of the most recent blog posts to your site.

Who can do what in a blog?

Who can do what in a blog depends on whether they are an administrator, a member, or a public visitor (i.e. not logged in as a member). The available functionality is summarized in the table below.

Read more/less

Function	Administrators?	Members?	Public?
Create new posts	In admin view: Always In public view: Depends on gadget settings	Depends on gadget settings	No
View or comment on posts	In admin view: Always In public view: Depends on gadget settings	Depends on gadget settings	Depends on gadget settings
Modify or delete posts, comments	In admin view: Always In public view: Only their own	Only their own	Only their own comments
Insert image, file/attachment, ArtText	In admin view only	No	No

Subscribe to blog	Yes	Yes	Yes

Setting up blog pages

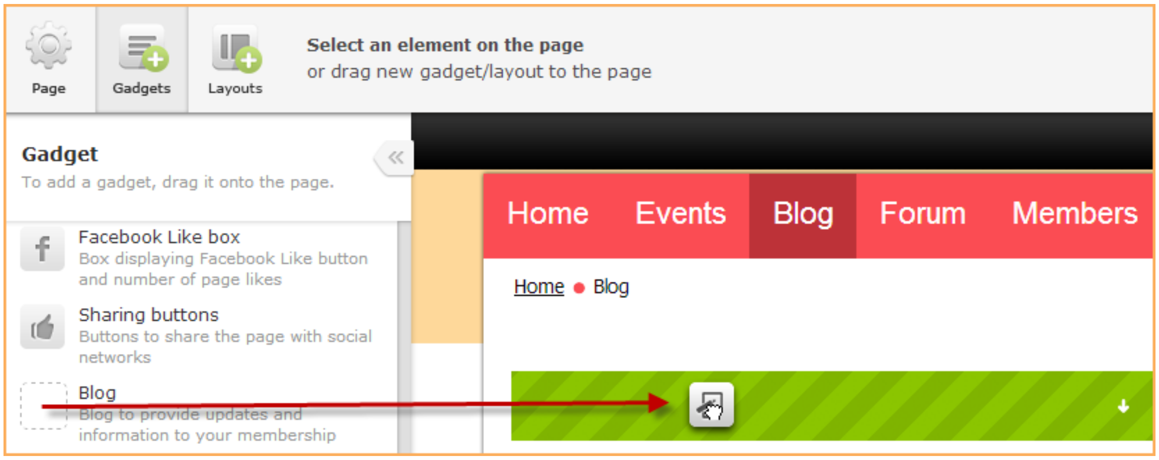
You can create as many different blogs as you wish. You can limit access to a blog by placing it on a restricted page. If you make the page public, you can still use the blog gadget settings to control functionality for visitors and members.

Adding a blog

To add a blog to a page on your site, follow these steps:

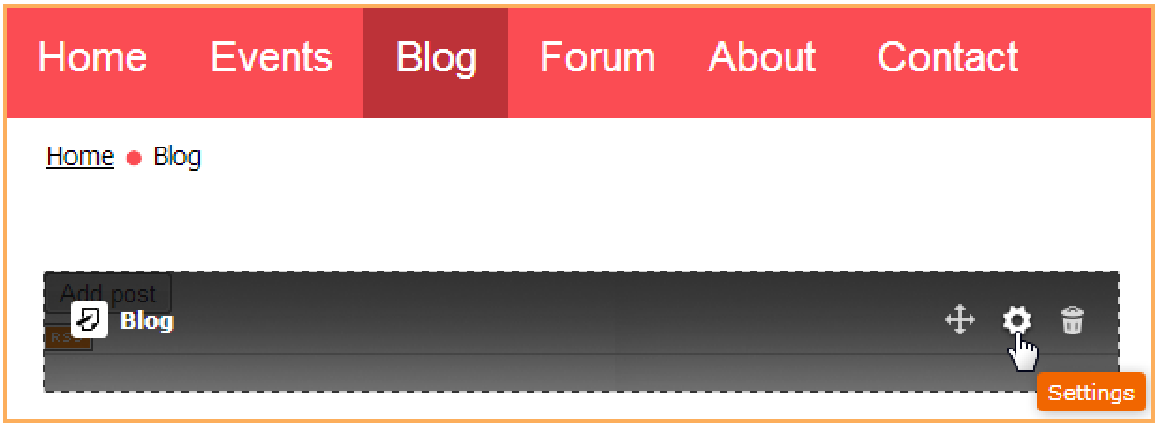
Read more/less

1. Go to **Sites pages** (under the **Website** menu) and create or begin editing the site page where you want the blog to appear.
2. Click the **Gadget** icon to display the list of available gadgets.
3. Drag the blog gadget from the list, and drop it where you want it to appear on the page. You can insert it into a section within a layout, or above or below a layout.



When a layout cell or placeholder is empty, a **Drop gadget or grid here** prompt will be displayed. When you drag a gadget over an empty layout cell or placeholder, it turns green, indicating that you can drop the gadget there. When you drag a gadget above or below a layout, a prompt will appear indicating that you can drop the gadget before or after the layout.

4. After you have dropped the gadget in the desired location, hover your pointer over it and click the **Settings** icon.



5. From the gadget settings panel on the left, choose the desired settings for your blog. You can choose the blog name, control whether an RSS icon appears, and decide what kinds of visitors can read, comment on, and add blog posts. For more information, see Adjusting blog settings (below).
6. Click **Save** to save the changes to the page.

For instructions on restricting access to the page, see Page access and visibility.

Adjusting blog settings

Now that you have added a blog gadget to a site page, you can adjust the blog gadget settings to control the appearance of the page and the ability of visitors to read, add, and comment on posts.

Read more/less

Gadget settings appear in a panel on the left side (which can be hidden to maximize the page design area). To display the settings panel, you position your pointer over the gadget – while editing a site page – then click the gadget settings icon.

The following blog gadget settings are available.

Blog name

Choose the name used to identify the blog within the settings for the recent blog posts gadget.

Show RSS icon

Decide whether to display an RSS icon appears on your blog beside the blog title.

By clicking on the RSS icon, visitors to your site can subscribe and be automatically notified of updates to the blog in their RSS reader. If your blog appears on a page with restricted access, the RSS feed will not be accessible to your RSS reader.

> If you're using Google Chrome, you may need to add a RSS subscription extension to your browser.

Show full post content

Choose whether to display the complete content for each blog post, or just a short excerpt from each post. Below each excerpt would be a **Read more** link that the reader can click to view the full blog post. Alternatively, the reader could click the topic title.

Access permissions

For each type of visitor to your site, you can control whether they can read, comment on, or add posts. You can set access permissions separately for public visitors, and for each membership level and member group. If you restrict permissions by both membership levels and member groups, then members will be granted the highest permission assigned to the levels and groups they belong to . For example, if you provide read-only access for Bronze members but full access to members of the Steering Committee member group, then a Bronze member who is also a member of the Steering Committee will be granted full access.

Y ou can choose from the following permission settings:

- – Read: Can read posts, but cannot comment on or add posts.

- – Read, comment: Can read posts and comment on them, but cannot add new posts.
- – Read, comment, add posts: Can read posts, comment on them, and add new posts.

> Public visitors (non-members) can never create new posts. Administrators in admin view can always view and comment on posts, and add new posts (and modify and delete any post). In public view, administrators are subject to the same restrictions as others at the same membership level.

Margins

The amount of space – in pixels – that appears outside the gadget. You can set top, bottom, left, and right margins separately.

Advanced options

For designers and developers familiar with HTML and CSS, the following advanced settings are available:

Setting	Description
HTML ID	A unique identifier by which the gadget can be referenced within custom CSS or JavaScript code. The identifier is automatically generated but can be replaced with a more readable or memorable one (e.g. MyBlogGadget).
CSS class	The name of a CSS class defined on the CSS customization screen.
Inline style	CSS code to control the behavior or appearance of the gadget. For example, you could enter *width: 250px;* to control the gadget width.

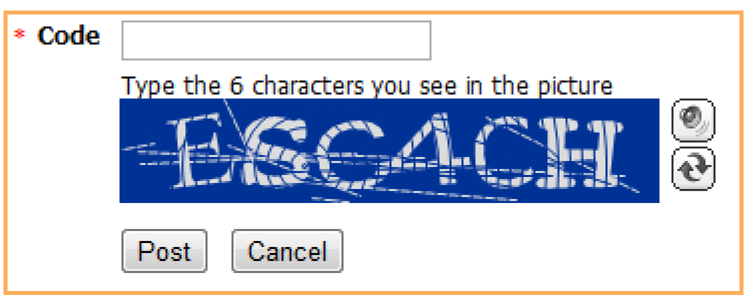
Adding a description

You can add a description for your blog by inserting a content gadget ahead of the blog gadget. Within the content gadget, you can add a title and description, and format them using text styles.For more information on adding and formatting text, see Using the content editor.

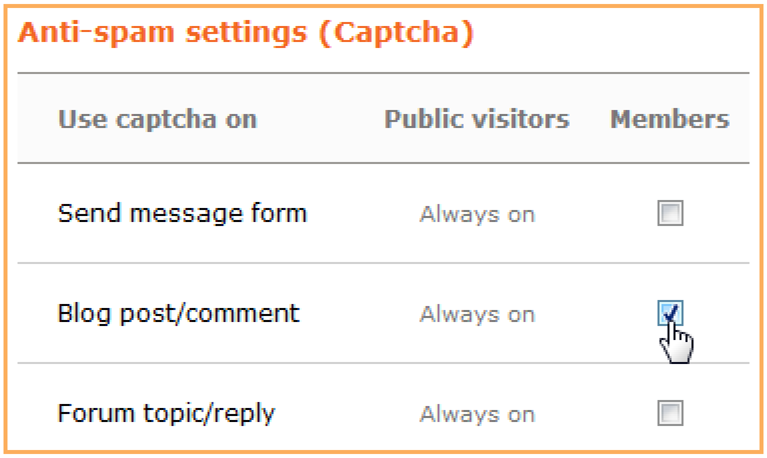
Enabling anti-spam settings

To prevent automated software – known as spambots – from bombarding your blog with spam posts and comments, you can enable Wild Apricot's anti-spam Captcha feature. With Captcha enabled, visitors to your blog would have to enter a set of characters – proving them to be a person rather than a program – before being able to add a post or comment.

Read more/less



To enable Captcha for blog posts and comments, go to **Settings**, and click **Anti-spam settings (Captcha)** under **Security**. On the screen that appears, click the checkbox beside **Blog post/comment** then click **Save changes**.



Some spambots can use OCR technology to bypass Captchas, so you might consider restricting blog comments to logged in members. If you continue to receive a lot of spam, contact us and we'll try to identify and (at least temporarily) block the spammer's IP address.

Changing colors and fonts

You can change the colors, text styles, and backgrounds used in your website from the Colors and styles screen. For a list of the blog elements you can customize, click here. For more advanced fine-tuning, you can use CSS customization and theme overrides.

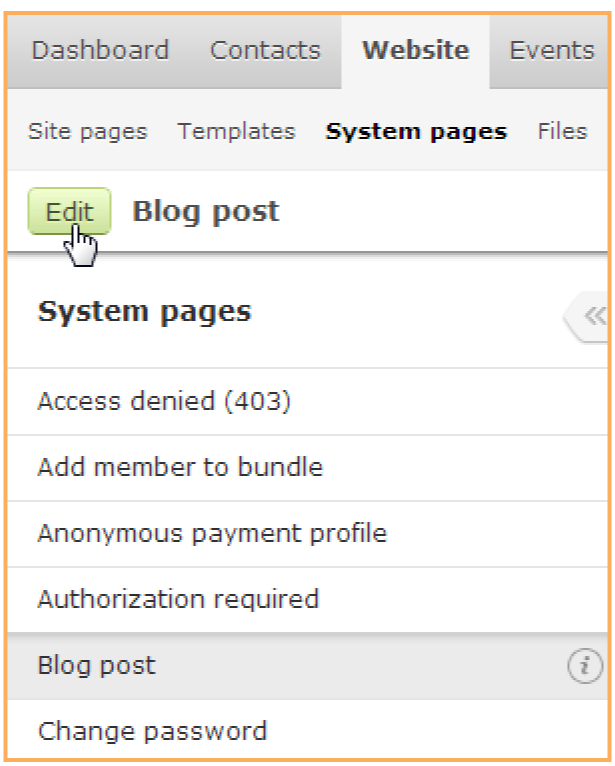
Modifying the blog post system page

You can customize the blog page that appears when visitors create or view blog posts by modifying the **Blog post** system page.

To customize the forum topic system page, follow these steps:

Read more/less

1. Hover over the **Website** menu and select the **System pages** option.
2. Within the system page list, select **Blog post**.
3. Click the **Edit** button.



Now, you can modify the system page in a number of ways. You can:

- Change the page template from the page settings on the left.
- Hover over the blue box – the system gadget that displays the actual forum topic – and click the **Settings** icon to display the settings for the system gadget.
- Click the **Gadget** or **Layout** drop-downs to insert gadgets and layouts above or below the system gadget.

When you are finished modifying the blog post system page, click the **Save** button.

Using a blog

A blog displays a list of blog postings, with a short excerpt or abstract from each post.

Viewing a blog post

To view a complete blog posting, you click either the topic title or the **Read more** link below the abstract.

Read more/less

To display comments on a post, click the **Comments** link.

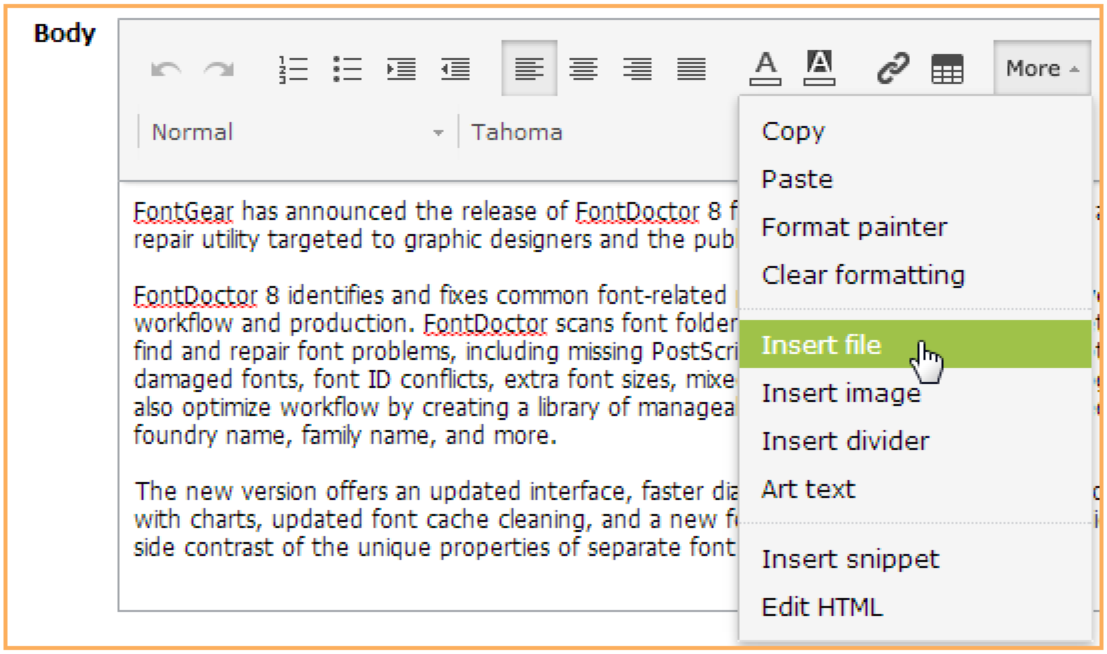
The options available to you on blogs will depend on whether you are a member, and if so, on your membership level.

Adding posts

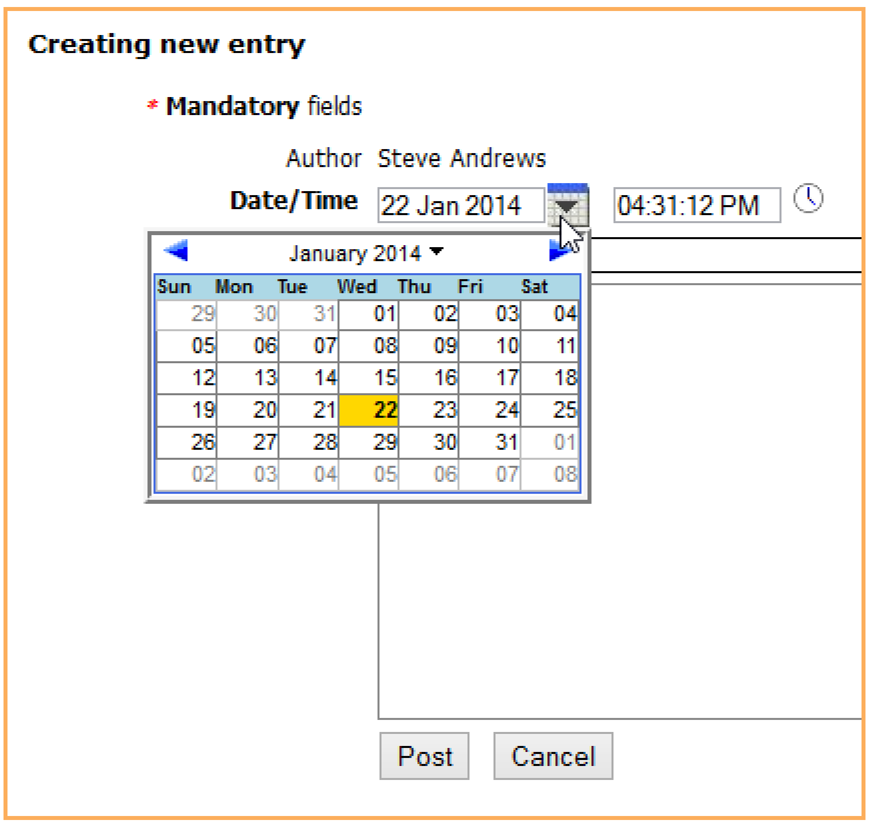
If you are authorized to add a blog post, an **Add post** button will appear above the topic list.

Read more/less

After clicking this button, you can enter the subject and the body of the new topic. You can use the content editor toolbar to format the body text, and add links and tables. Administrators in admin view can also add pictures, documents, and ArtText, or modify the underlying HTML, using the **More** menu that appears within the toolbar.

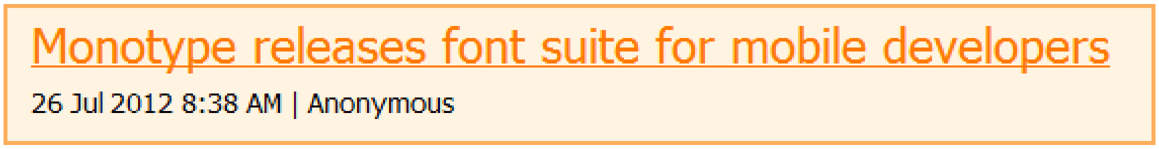


You can also set the posting time and date. This does not affect when the post appears on the blog – it will appear as soon as you click the **Post** button – but only the time and date that appears below the post title.



Once you are done composing the topic, click **Post**. The post will now appear on the main blog page.

Normally, the topics you post will identify you using your first and last name. If you chose to hide your profile from others in your privacy settings – or if you are not a member – your posts will identify you as *Anonymous*. If you restricted access to both your first name and last name in your privacy settings, you will be identified as *Anonymous member*.



The photo of the blog post author cannot currently be displayed.

Commenting on a post

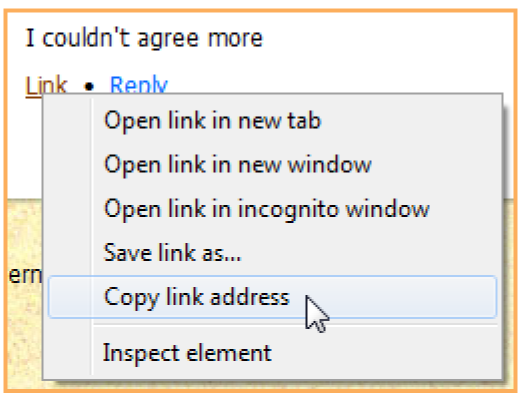
To comment on a blog post, display the topic then click the **Add comment** button.

Read more/less

After clicking this button, you can enter your comment. You can use the edit toolbar to format the text and add pictures, document, or links. Once you are done composing your comment, click **Post**.

To reply to a particular comment, click the **Reply** link below the comment. Once you are done composing your reply, click **Post**. Your reply will appear below the comment.

To copy a link to a comment or reply – so you can share it or link to it from another page – right click over **Link** and copy the address to your clipboard.

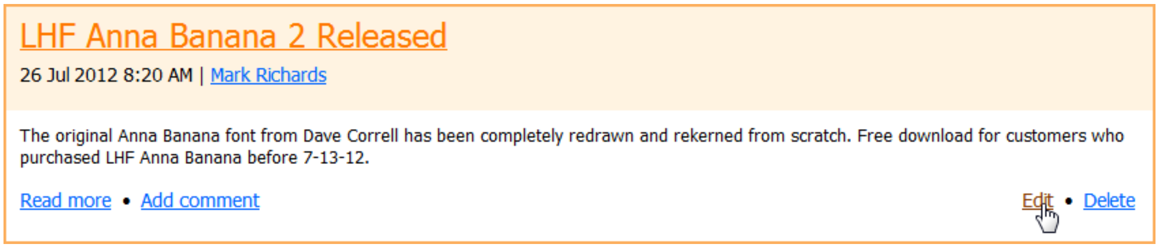


Modifying and deleting posts

After you've added a post, you can modify or delete it.

Read more/less

To modify a post, click the **Edit** link below the topic in the blog post list.



To delete a blog post, including all comments and replies, click the **Delete** link below the topic.

In public view, you can only modify or delete your own posts. In admin view, an administrator can modify or delete any posts.

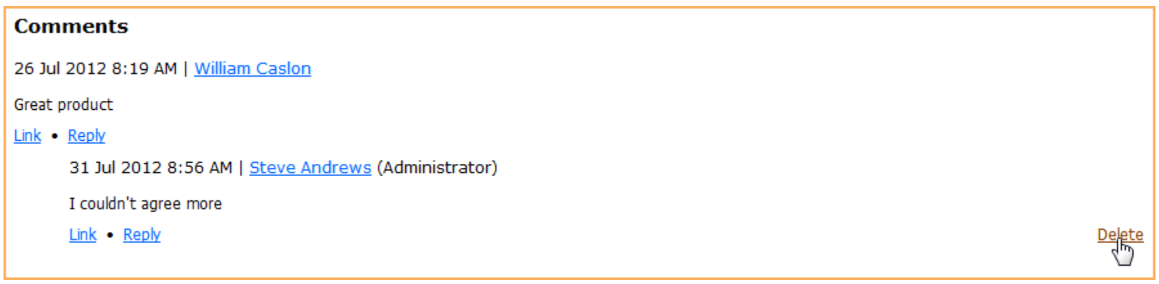
> ⚠ To modify a blog post in admin view, go to **Site pages** under **Website** and click the blog page within the list of site pages. Now, within the blog page appearing on the right, click the **Edit** button beside the post you want to edit.

Deleting comments and replies

After you've commented on a post, or replied to a comment, you can delete your comment or reply.

Read more/less

To delete a comment or reply, display the comments then click the **Delete** link.



In public view, you can only delete your own comments or replies. In admin view, an administrator can delete any comments or replies.

Subscribing to a blog

Visitors to your site can subscribe to your blog and automatically receive updates in their RSS reader by clicking the RSS icon that appears beside the page title.

Read more/less

> ⓘ If you're using Google Chrome, you may need to add a RSS subscription extension to your browser.

You can control whether the RSS icon appears as part of the blog gadget settings.

> ⚠ If your blog appears on a restricted page, the RSS feed will not be accessible to your RSS reader.

Blog post limits

Item	Limit
Subject	400 characters
Text per post	50Kb or 51200 characters
omment	25000 characters
Author name	100 characters

On this page:

Expand all sections

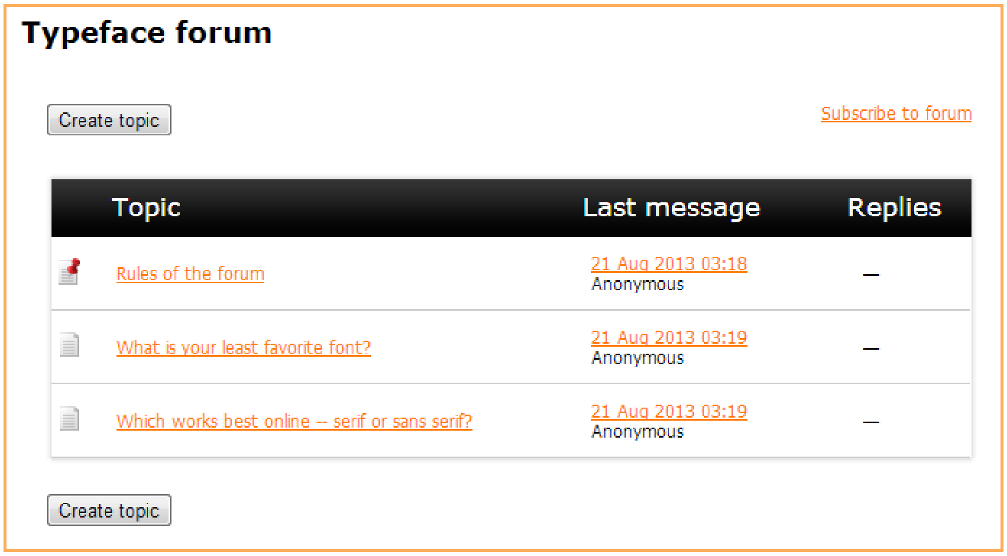
See also:

- Blog gadget
- Customizing blogs using CSS
- Adding Wild Apricot functionality to other websites
- Blog widget
- Recent blog posts gadget

Discussion forums

Setting up and using discussion forums

You can add a discussion forum to your Wild Apricot site so that members can post messages and reply to other messages. Adding a forum provides your members a place to congregate, collaborate, and discuss ideas.



Discussion forums – like other site content – are inserted as gadgets, in this case, a discussion forum gadget. You cannot add a discussion forum gadget – or any other singular gadget – to a page template or system page, or to a page containing another singular gadget.

> ⓘ You can embed a Wild Apricot discussion forum on another website using widgets.

You can create as many discussion forums as you wish. If you have multiple forums, you can insert a forum summary gadget to display a summary of the activity in your discussion forums. You can also insert a forum updates gadget to display a list of the most recent forum updates.

Who can do what in a forum?

Who can do what in a discussion form depends on whether they are an administrator, a member, or a public visitor (i.e. not logged in as a member). The available functionality is summarized in the table below.

Read more/less

Function	Administrators?	Members?	Public?
Post new topics	In admin view: Always In public view: Depends on gadget settings	Depends on gadget settings	No
View or reply to topics	In admin view: Always In public view: Depends on gadget settings	Depends on gadget settings	Depends on gadget settings
Modify or delete topics/replies	In admin view: Always In public view: Only their own	Only their own	Only their own replies
Insert image, file/attachment, ArtText	In admin view only	No	No
Make a topic sticky	In admin view only	No	No
Subscribe to forum	Only for themselves	Yes	No
Change frequency of notifications	Yes	Yes	n/a

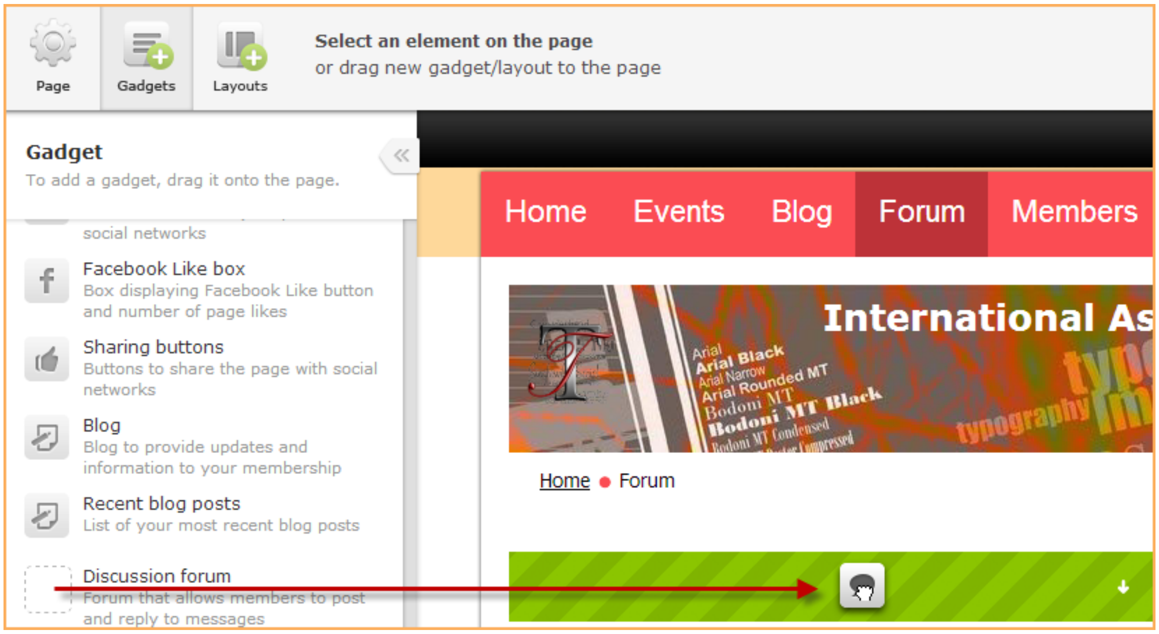
Adding a discussion forum to a page

To add a discussion forum to a page on your site, follow these steps:

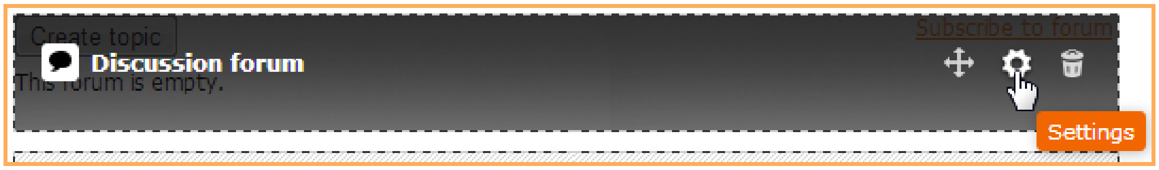
Read more/less

1. Go to **Site pages** (under the **Website** menu) and create or begin editing the site page where you want the discussion forum to

appear.
2. Click the **Gadgets** icon to display the list of available gadgets.
3. Drag the discussion forum gadget from the list, and drop it where you want it to appear on the page. You can insert it into a section within a layout, or above or below a layout.



When a layout cell or placeholder is empty, a **Drop gadget or layout here** prompt will be displayed. When you drag a gadget over an empty layout cell or placeholder, it turns green, indicating that you can drop the gadget there. When you drag a gadget above or below a layout, a prompt will appear indicating that you can drop the gadget before or after the layout.
4. After you have dropped the gadget in the desired location, hover your pointer over it and click the **Settings** icon.



5. From the gadget settings panel on the left, choose the desired settings for your discussion forum. You can choose the forum name, enter a description, pick a category, and decide what kind of visitors can read, respond to, and post forum topics. For more information, see Adjusting discussion forum settings (below).
6. Click **Save** to save the changes to the page.

For instructions on restricting access to the page, see Page access and visibility.

Adjusting discussion forum settings

Now that you have added a discussion forum gadget to a site page, you can adjust the discussion forum gadget settings to control the appearance of the page and the ability of visitors to read, respond to, and post forum topics.

Read more/less

Gadget settings appear in a panel on the left side (which can be hidden to maximize the page design area). To display the settings panel, you position your pointer over the gadget – while editing a site page – then click the gadget's **Settings** icon.

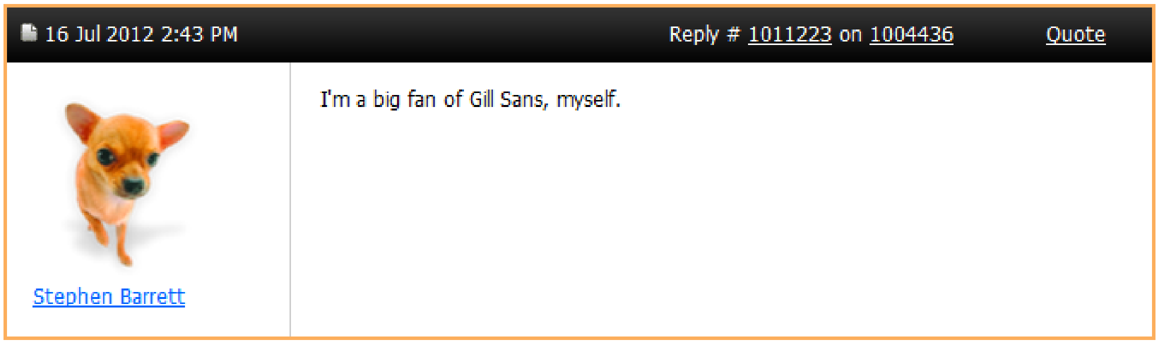
The following discussion forum gadget settings are available.

Forum name

The name used to identify the forum within the settings for the forum updates gadget and forum summary gadget.

User picture field

If you want to display a picture above the member's name in forum messages, you can select a picture field from your contact or membership database. You might, for example, allow members to chose avatars to represent their online identity.



If member pictures are enabled, the member's picture will be displayed in their forum posts unless the picture field is restricted under their privacy settings.

Default order for replies

You can set the default order in which forum replies are listed (newest to oldest or oldest to newest). Visitors to your forum will have the option of changing the order for each forum topic.

Forum description

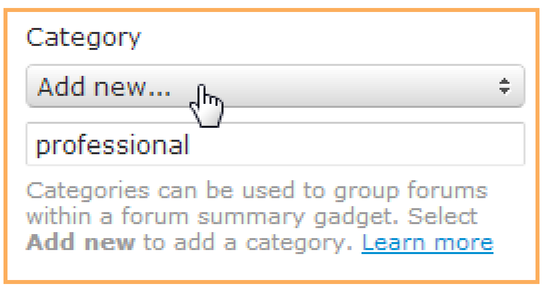
You can provide a brief description that will appear for the forum on the forum summary gadget, and optionally, on this gadget as well.

Show on this page

You can control whether the forum description appear on this gadget as well as the forum summary gadget.

Category

If you have multiple forum pages, you can assign each one to a category. The categories are used to group forums on a forum summary page. To create a new category, click **Add new**, then type the category name in the field below.



Access permissions

For each type of visitors, you can control whether they can view, comment on, or post forum topics. You can set access permissions separately for public visitors, and for each membership level and member group. If you restrict permissions by both membership levels and member groups, then members will be granted the highest permission assigned to the levels and groups they belong to. For example, if you provide read-only access for Bronze members but full access to members of the Steering Committee member group, then a Bronze member who is also a member of the Steering Committee will be granted full access.

You can choose from the following permission settings:

- – No access: Cannot read forum topics.
- – Read: Can read topics, but cannot reply or create new topics.
- – Read, comment: Can read topics and reply to them, but cannot create new topics.
- – Read, comment, create topics: Can read topics, reply to them, and post new topics.

Public visitors (non-members) can never create new topics. Administrators in admin view can always view, reply to, create, modify, and delete topics. In public view, administrators are subject to the same restrictions as others at the same membership level.

Margins

The amount of space – in pixels – that appears outside the gadget. You can set top, bottom, left, and right margins separately.

Advanced options

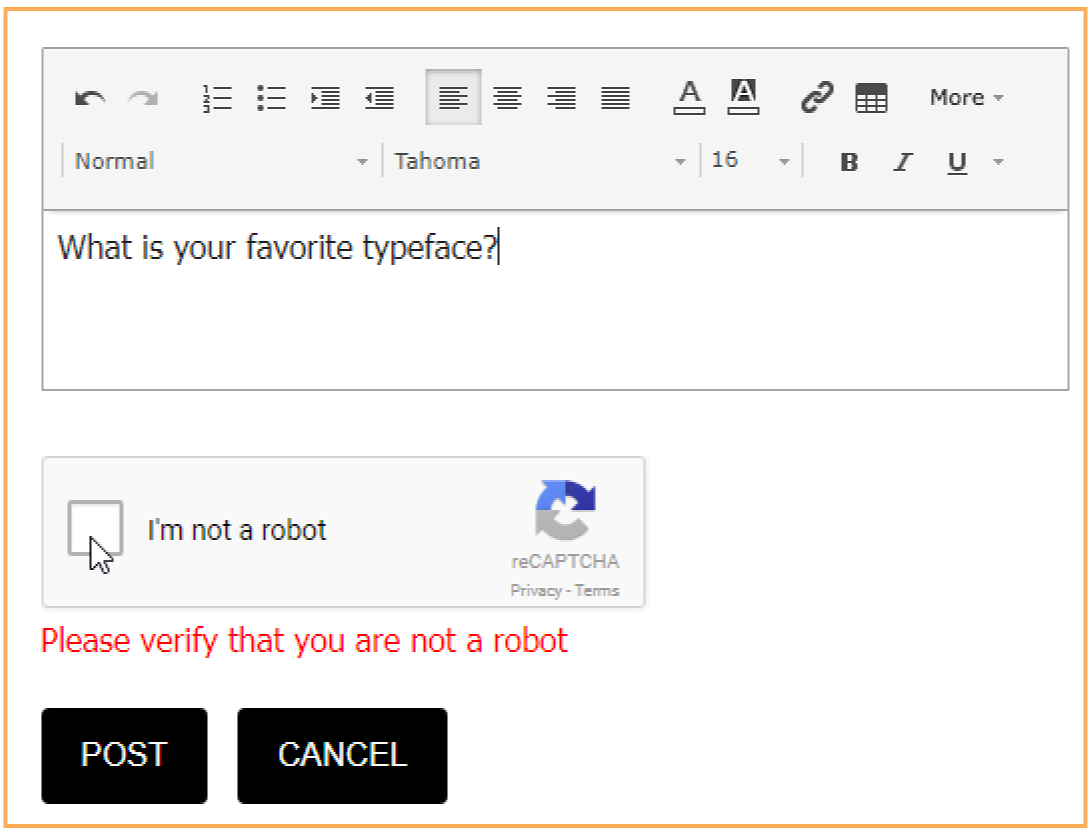
For designers and developers familiar with HTML and CSS, the following advanced settings are available:

Setting	Description
HTML ID	A unique identifier by which the gadget can be referenced within custom CSS or JavaScript code. The identifier is automatically generated but can be replaced with a more readable or memorable one (e.g. MyDiscussionForumGadget).
CSS class	The name of a CSS class defined on the CSS customization screen.
Inline style	CSS code to control the behavior or appearance of the gadget. For example, you could enter *width: 250px;* to control the gadget width.

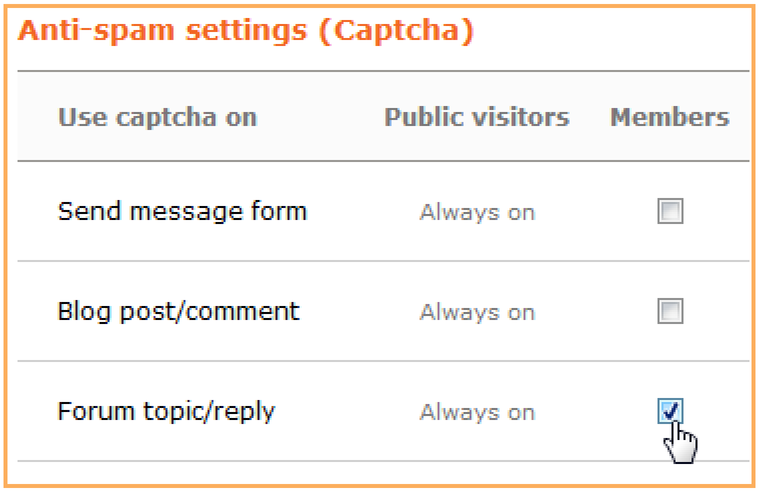
Enabling anti-spam settings

To prevent automated software – known as spambots – from bombarding your forum with spam posts, you can enable Wild Apricot's anti-spam Captcha feature. With Captcha enabled, visitors to your forum would have to enter a set of characters – proving them to be a person rather than a program – before being able to submit a forum topic or reply.

Read more/less



To enable Captcha for forum posts, go to **Settings**, and click **Anti-spam settings (Captcha)** under **Security**. On the screen that appears, click the checkbox beside **Forum topic/reply** then click **Save changes**.



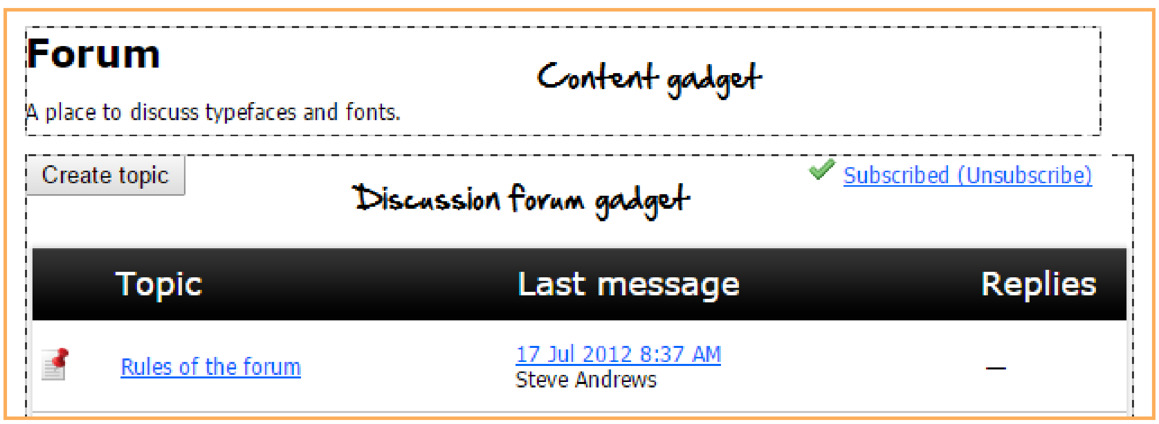
Some spambots can use OCR technology to bypass Captchas, so you might consider restricting forum replies to logged in members. If you continue to receive a lot of spam, contact us and we'll try to identify and (at least temporarily) block the spammer's IP address.

Adding a title and description

You can add a title and description for a discussion forum by inserting a content gadget ahead of the discussion forum gadget.

Read more/less

Within the content gadget, you can format the title and description using text styles.



For more information on inserting text and using text styles, see Using the content editor.

Changing colors and fonts

You can change the colors and text styles used on your discussion forum from the Colors and styles screen.

Read more/less

You can modify the following elements using the following color and style settings:

Any changes you make will be applied to other gadgets that use the same settings.

Modifying the forum topic system page

You can customize the forum page that appears when visitors create, view, or reply to forum topics by modifying the **Forum topic** system page.

Read more/less

To customize the forum topic system page, follow these steps:

1. Hover over the **Website** menu and select the **System pages** option.
2. Within the system page list, select **Forum topic**.
3. Click the **Edit** button.

Now, you can modify the system page in a number of ways. You can:

- Change the page template from the page settings on the left.
- Hover over the blue box – the system gadget that displays the actual forum topic – and click the **Settings** icon to display the settings for the system gadget.
- Click the **Gadget** or **Layout** drop-downs to insert gadgets and layouts above or below the system gadget.

When you are finished modifying the forum topic system page, click the **Save** button.

Adding a forum summary

If you have multiple discussion forums, you can display a summary of the activity in your forum pages by adding a forum summary gadget to a page on your Wild Apricot site.

Read more/less

You cannot add a forum summary gadget – or any other singular gadget – to a page template or system page, or to a page containing another singular gadget.

The forums are grouped within the summary by the categories you assigned to each forum in the discussion forum gadget settings. Forum names and descriptions are also derived from discussion forum gadget settings.

> You can embed a Wild Apricot forum summary on another website using widgets.

To add a forum summary to a site page, follow these steps:

1. Go to **Sites pages** (under the **Website** menu) and create or begin editing the site page where you want the forum summary to appear.
2. Click the **Gadget** icon to display the list of available gadgets.
3. Drag the forum summary gadget from the list, and drop it where you want it to appear on the page. You can insert it into a section within a layout, or above or below a layout.
4. After you have dropped the gadget in the desired location, hover your pointer over it and click the **Settings** icon.
5. From the gadget settings panel on the left, choose the desired settings for your forum summary. For more information, see Adjus ting forum summary settings (below).
6. Click **Save** to save the changes to the page.

Adjusting forum summary settings

Now that you have added a forum summary gadget to a site page, you can adjust the forum summary gadget settings to control its appearance and content.

Read more/less

Gadget settings appear in a panel on the left side (which can be hidden to maximize the page design area). To display the settings panel, you position your pointer over the gadget – while editing a site page or a page template – then click the gadget's **Settings** icon.

The following forum summary gadget settings are available.

Forums to include

Choose the forums to be included in the forum summary. Forums are identified using the forum name you specified as part of the discuss ion forum gadget settings.

Margins

The amount of space – in pixels – that appears outside the gadget. You can set top, bottom, left, and right margins separately.

Advanced options

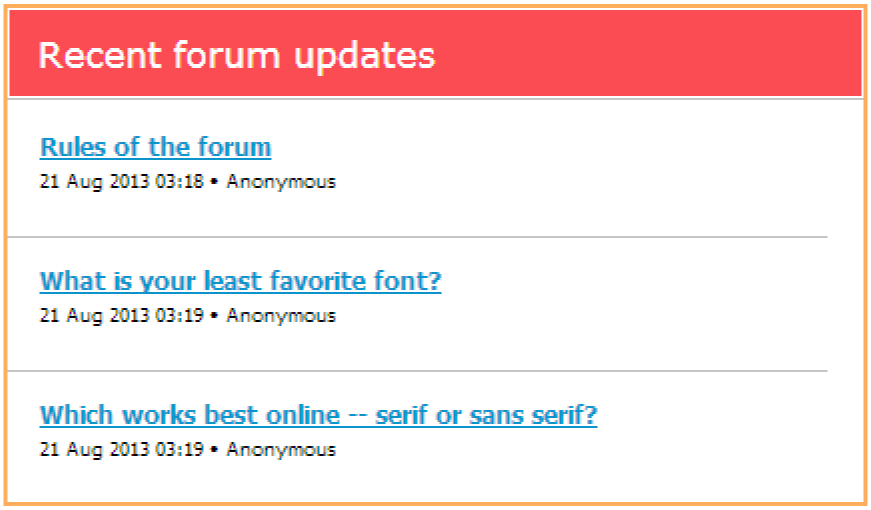
For designers and developers familiar with HTML and CSS, the following advanced settings are available:

Setting	Description
HTML ID	A unique identifier by which the gadget can be referenced within custom CSS or JavaScript code. The identifier is automatically generated but can be replaced with a more readable or memorable one (e.g. MyForumSummaryGadget).
CSS class	The name of a CSS class defined on the CSS customization scre en.
Inline style	CSS code to control the behavior or appearance of the gadget. For example, you could enter *width: 250px;* to control the gadget width.

Adding a forum updates gadget

You can display a list of the most recent forum updates by adding a forum updates gadget to a page or page template on your Wild Apricot site.

Read more/less



Topics from multiple forums will be combined into a single list. Topics are displayed in chronological order, beginning with the most recent. Sticky topics are treated the same as other topics.

To add a forum updates gadget to a page or page template, follow these steps:

1. Go to **Sites pages** (under the **Website** menu) and create or begin editing the site page or page template where you want the forum updates to appear.
2. Click the **Gadget** icon to display the list of available gadgets.
3. Drag the forum updates gadget from the list, and drop it where you want it to appear on the page. You can insert it into a section within a layout, or above or below a layout.
4. After you have dropped the gadget in the desired location, hover your pointer over it and click the **Settings** icon.
5. From the gadget settings panel on the left, choose the desired settings for your forum updates. For more information, see Adjusting forum updates settings (below).
6. Click **Save** to save the changes to the page.

Adjusting forum updates settings

Now that you have added a forum updates gadget to a page or page template, you can adjust the forum summary gadget settings to control its appearance and content.

Read more/less

Gadget settings appear in a panel on the left side (which can be hidden to maximize the page design area). To display the settings panel, you position your pointer over the gadget – while editing a site page or a page template – then click the gadget's **Settings** icon.

The following forum summary gadget settings are available.

Show last *n* topics

Choose the number of recent forum updates that you want to display on the gadget.

Forums to include

Choose the forums to be included in the forum updates. Forums are identified using the forum name you specified as part of the discussion forum gadget settings.

Text to show when there are no topics

The text to be displayed when there are no forum updates to display.

Forums to include

Choose the forums to be included in the forum summary. Forums are identified using the forum name you specified as part of the discussion forum gadget settings.

Margins

The amount of space – in pixels – that appears outside the gadget. You can set top, bottom, left, and right margins separately.

Advanced options

For designers and developers familiar with HTML and CSS, the following advanced settings are available:

Setting	Description
HTML ID	A unique identifier by which the gadget can be referenced within custom CSS or JavaScript code. The identifier is automatically generated but can be replaced with a more readable or memorable one (e.g. MyForumUpdatesGadget).
CSS class	The name of a CSS class defined on the CSS customization scre en.
Inline style	CSS code to control the behavior or appearance of the gadget. For example, you could enter *width: 250px;* to control the gadget width.

Using a forum page

When you visit a forum page, the options available to you may depend on whether you are a member, and if so, on your membership level. If you are not already logged in, you will be prompted to sign in using your Wild Apricot credentials when you try to add or reply to a forum topic.

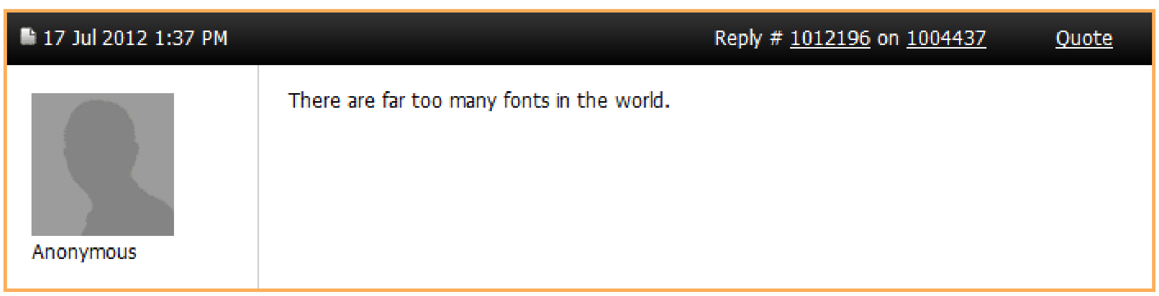
Adding topics

If you are authorized to create new forum topic, a **Create topic** button will appear above and below the topic list.

Read more/less

After clicking this button, you can enter the subject and the body of the new topic. You can use the content editor toolbar to format the body text, and add links and tables. Administrators in admin view can also add pictures, documents, and ArtText, or modify the underlying HTML. Once you are done composing the topic, click **Create**. The topic will now appear on the main forum page.

Normally, the topics you post will identify you using your first and last name. If member pictures are enabled, your picture will be displayed unless the picture field is restricted under your privacy settings. If you chose to hide your entire profile from others in your privacy settings – or if you are not a member – the topic will identify you as *Anonymous*. If you restricted access to both your first name and last name in your privacy settings, you will be identified as *Anonymous member*.



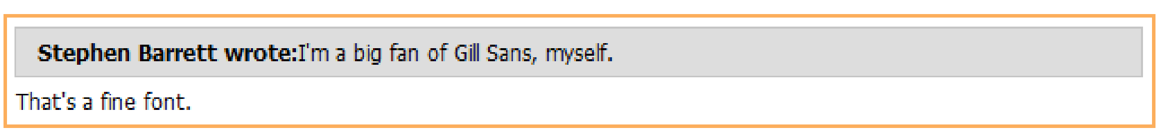
Replying to a topic

To reply to a topic, display the topic then click the **Reply** button.

Read more/less

After clicking this button, you can enter the body of your reply. You can use the content editor to format the text and add links. Once you are done composing your reply, click **Post**.

To comment on a particular reply within a topic, click the **Quote** link above the reply. This will include in your message the text of the reply that you are commenting on. Once you are done composing your comment, click **Post**.



Changing the order of replies

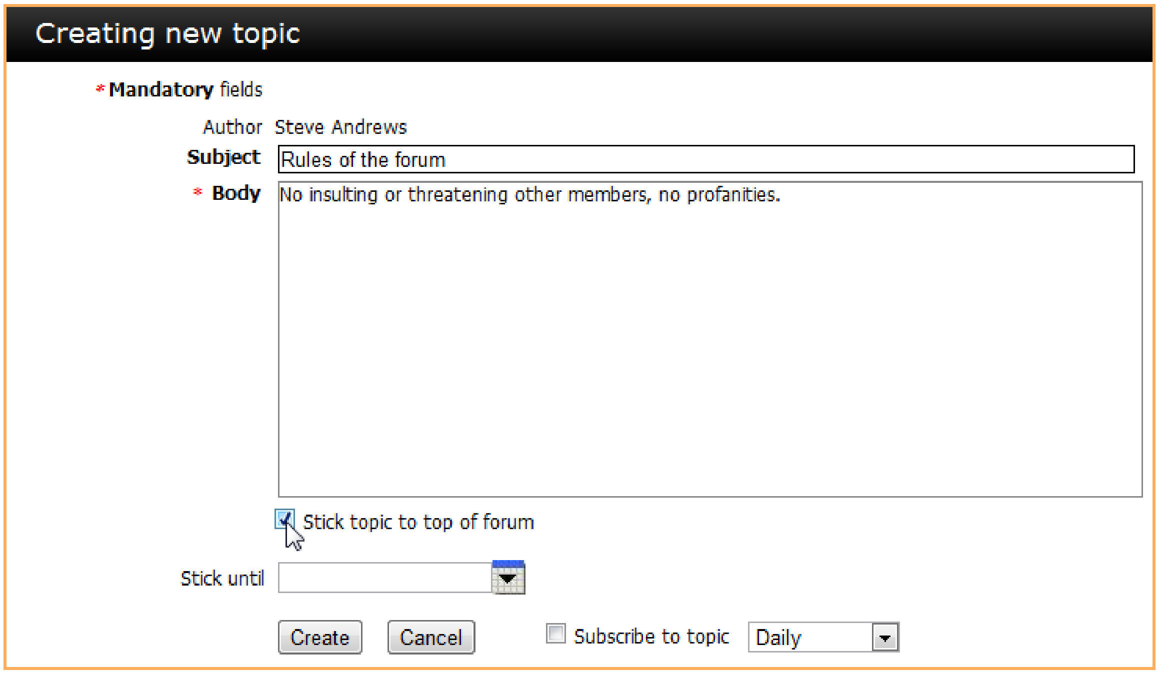
To change the order in which topic replies are displayed, click the **Show latest replies** link or the **Show oldest replies** link. You can set the order differently for different topics, and your choices will be remembered between visits.

Creating forum stickies

On each forum page, topics are ordered by the date of the most recent message. If there is an important topic or announcement that you want everyone to see, you can make it "stick" to the top of the forum – appear ahead of all other topics.

Read more/less

You can make a topic sticky when you are creating or modifying it, but only from admin view. To do so, click the **Stick topic to top of forum** checkbox. You can also set a time limit after which the topic will no longer be sticky.



Within the list of forum topics, sticky topics are marked by a pushpin icon.

Subscribing to a forum

Members can subscribe to your forum, or to individual topics within the forum, so that they receive email notifications of updates.

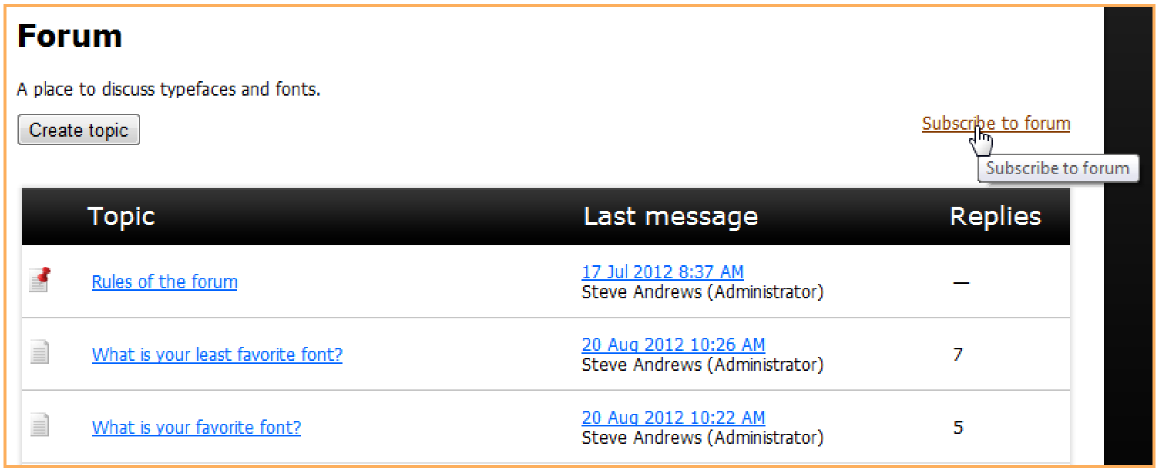
Read more/less

After receiving the notification, a member can visit the forum to view the new topics or replies.

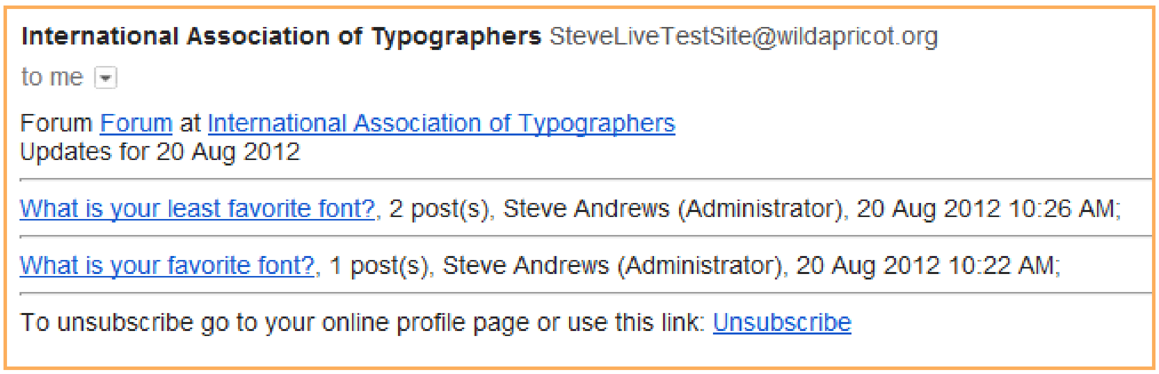
Only members can subscribe themselves to a forum or forum topic – the subscription cannot be set up by an administrator. However, once the member has subscribed, either the member or an administrator can set the frequency of the email notifications. Members are not subscribed by default to any forums.

Subscribing to the entire forum

To subscribe to the entire forum, a member visits the forum page and clicks the **Subscribe to forum** link above the topic list.



The member will subsequently receive email notifications of updates to any of the topics in the forum, with links to the new or updated topics.

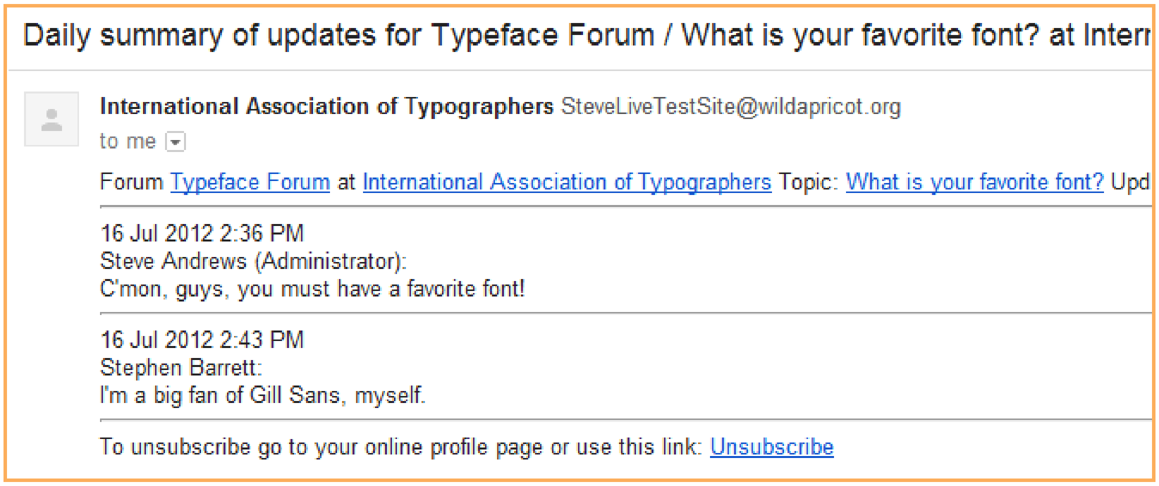


To unsubscribe to a forum, the member clicks the **Subscribed (Unsubscribe)** link that appears in place of the **Subscribe to forum** link, or clicks the **Unsubscribe** link in the email.

Subscribing to a forum topic

To subscribe to just one topic in a forum, the member views the topic then clicks the **Subscribe to topic** link above the topic messages.

The member will subsequently receive email notifications of replies or updates to this forum topic alone, with the full text of the reply or update.



To unsubscribe to a forum topic, the member clicks the **Subscribed (Unsubscribe)** link that appears in place of the **Subscribe to topic** l ink, or clicks the **Unsubscribe** link in the email.

Frequency of email notifications

By default, email notifications of forum updates are sent on a daily basis. Either the member or an administrator can change the frequency of the email notifications from daily to weekly or immediately.

Daily forum notifications contains a summary of the previous day's updates. Weekly forum notifications are sent on Sunday night/Monday morning, and contain a summary of the previous week's updates. For more information on the timing of forum notifications, see Automatic emails schedule.

The forum date, time, and format shown to the public is also based on your organization's timezone and date/time format.

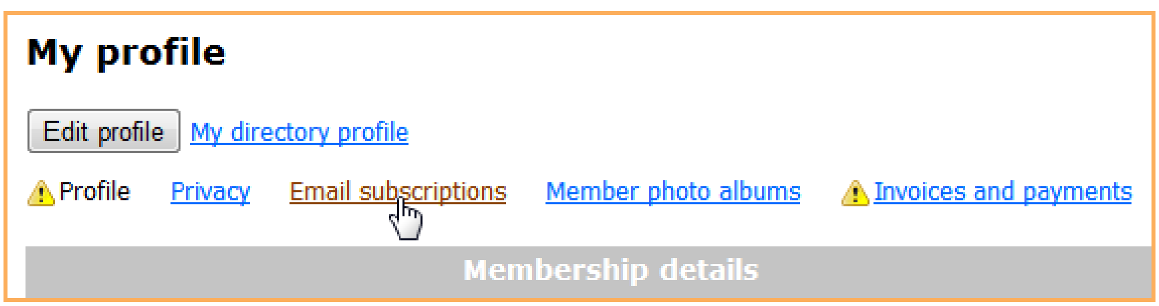
Changing forum subscription settings

Either the member or an administrator can change the member's forum subscription settings.

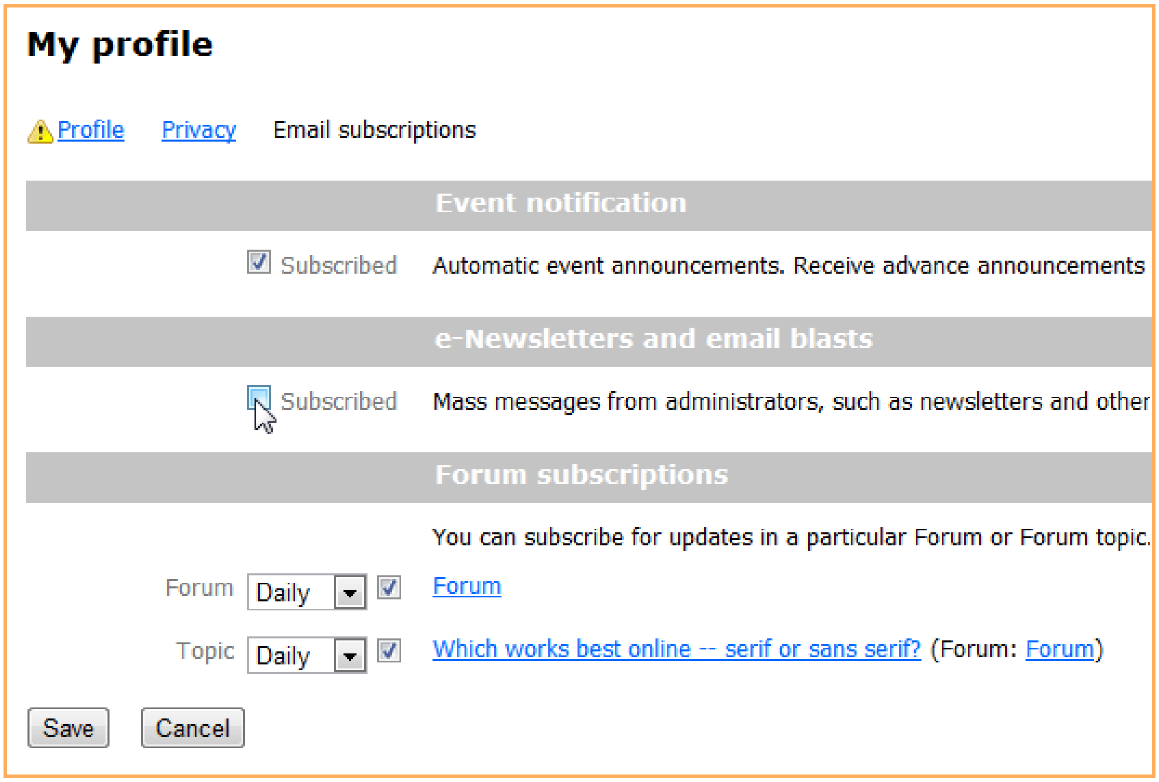
By members

To change their forum subscription settings, members follow these steps:

1. Go to their profile.
2. Click the **Email subscriptions** link.



3. Click the **Edit profile** button.
4. In the **Forum subscriptions** section, members can unsubscribe their existing subscriptions and change the frequency of forum update notifications.



To unsubscribe to a forum or forum topic, members uncheck the checkbox beside the forum or topic name.

To change the frequency of the update notifications, members click the dropdown and choose one of the following options:

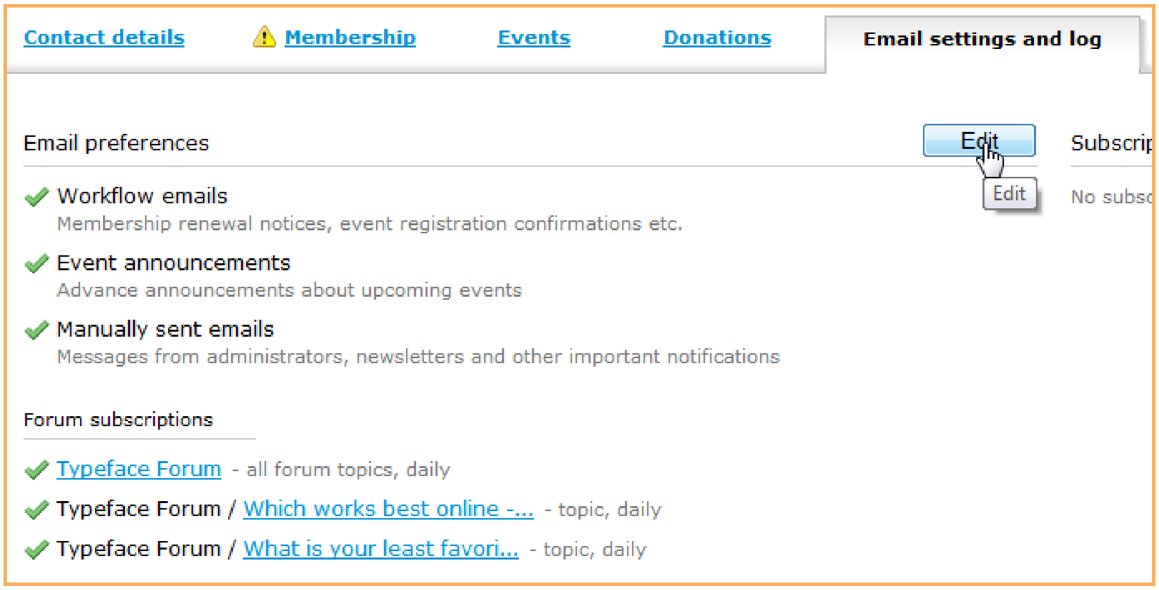
Option	Description
Daily	A summary of forum updates for each day is sent the following day.
Weekly	A summary of forum updates for each week is sent on Sunday night/Monday morning.
Immediately	Notifications are sent immediately after an update is made (though the actual delivery could be delayed a few minutes or longer depending on the email server load).

5. Once finished making changes, the member clicks the **Save** button.

By administrators

To change forum subscriptions for a member, an administrator:

1. Finds the member in the contact database and displays the member's details.
2. Clicks the **Email settings and log** link.
3. Clicks the **Edit** button beside **Email preferences**.



4. The administrator can now unsubscribe the member's existing subscription and change the frequency of the forum update notifications. An administrator cannot subscribe a member to a forum.
5. Once finished making changes, the administrator clicks **Save**.

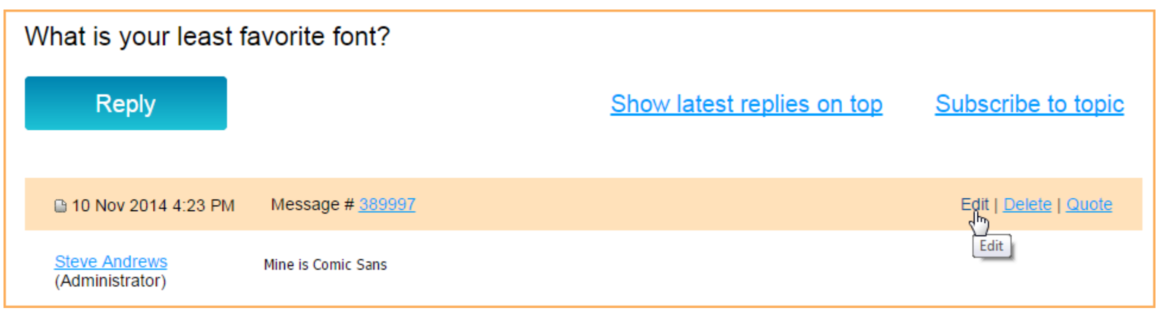
Managing forum topics and replies

In public view, you can only modify or delete the topics or replies that you have posted. In admin view, an administrator can modify or delete any topics or replies. Administrators can also move and merge forum topics, move forum replies, and create a new topic from a reply – all from admin view.

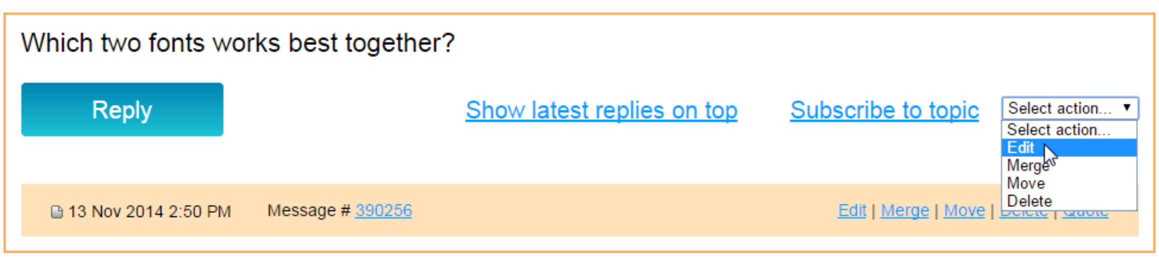
Modifying topics

To modify a topic you have posted, display it then click the **Edit** link above the first message in the topic thread.

Read more/less



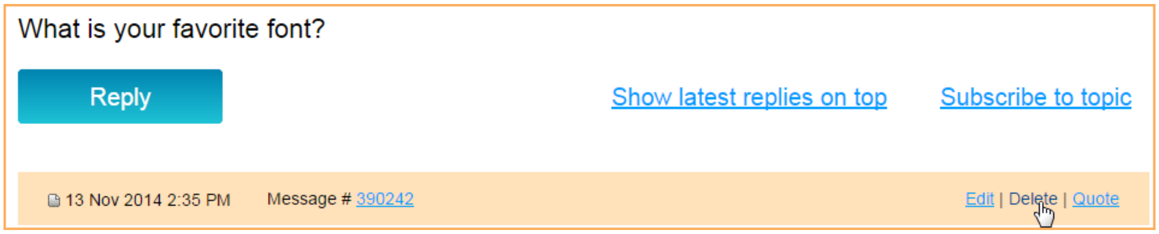
To modify a topic in admin view, display it then click the **Select action** drop down and choose the **Edit** option.



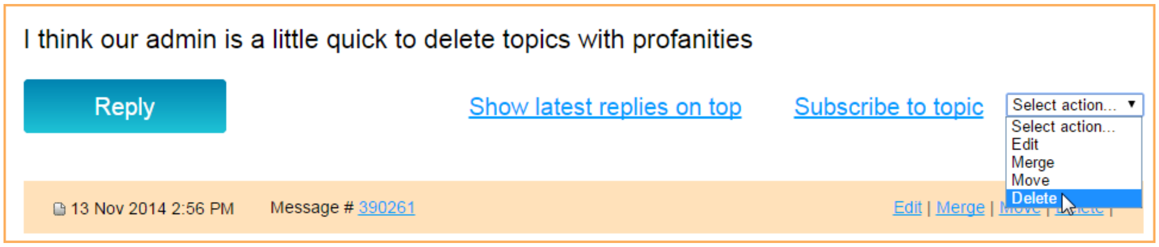
Deleting topics

To delete a topic you have posted – including all comments and replies – display it then click the **Delete** link above the first message in the topic thread.

Read more/less



To delete a topic in admin view, display it then click the **Select action** drop down and choose the **Delete** option.

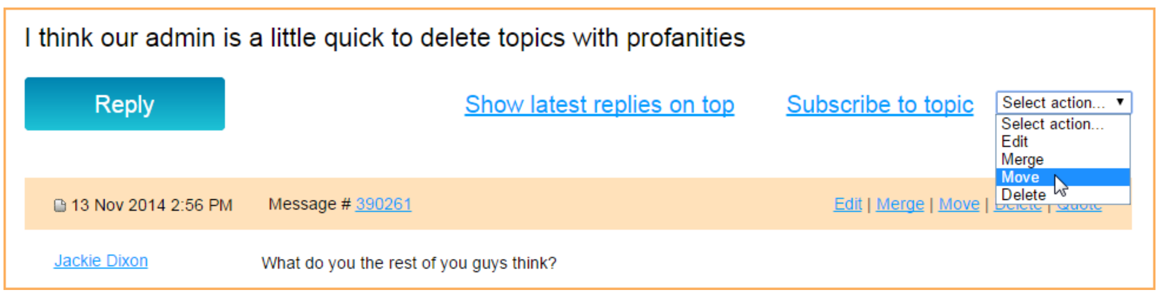


Once deleted, a forum topic cannot be restored.

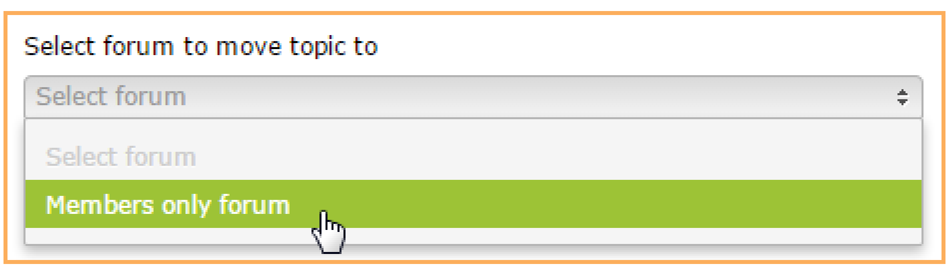
Moving topics

To move a forum topic (and its replies and comments) from one forum to another, display the topic then click the **Select action** drop down and choose the **Move** option.

Read more/less



From the dialog that appears, choose the forum you want to move the topic to.

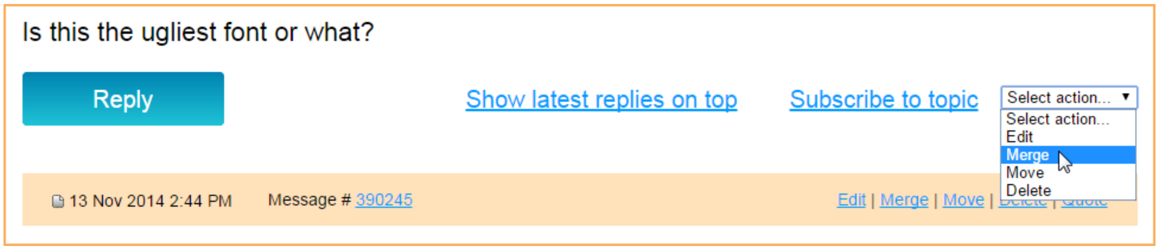


Subscribers to the original topic will continue to be subscribed to the topic in its new location. The URL of the original topic will be redirected to the new location. Subscribers to the destination forum will receive an email notifying them of the new topic.

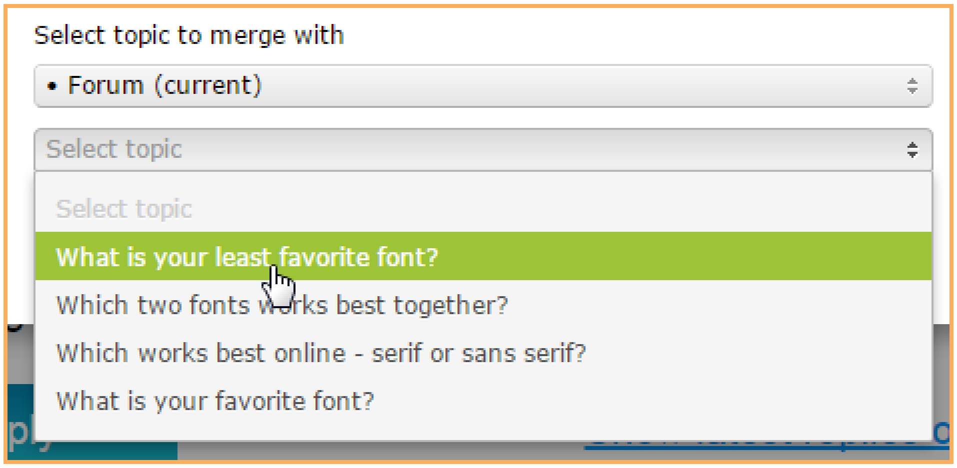
Merging topics together

You can merge two forum topics within the same forum or between forums. To merge topics, display the topic you want to append to another topic, then click the **Select action** drop down and choose the **Merge** option.

Read more/less



From the dialog that appears, choose the target topic with which the original topic will be merged (and the forum name, if the target topic resides in a different forum).



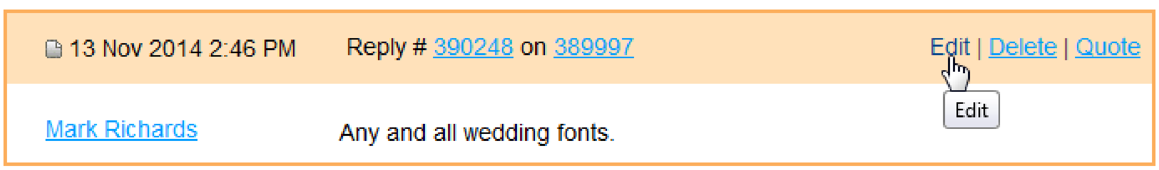
The original topic (along with its replies and comments) will added to the end of the target topic. Subscribers to the original topic will automatically become subscribed to the target topic, and subscribers to the target topic will receive an email notification of updates to the topic.

Modifying replies

In public view, you can only modify the replies that you have posted. In admin view, an administrator can modify or delete any replies.

Read more/less

To modify a forum reply – either in admin view or public view – display it then click the **Edit** link above the reply.

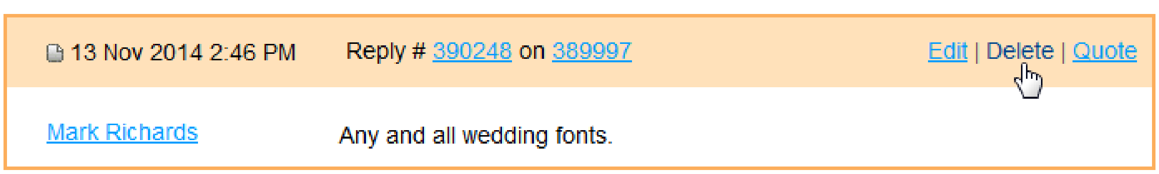


Deleting replies

In public view, you can only delete the replies that you have posted. In admin view, an administrator can delete any replies.

Read more/less

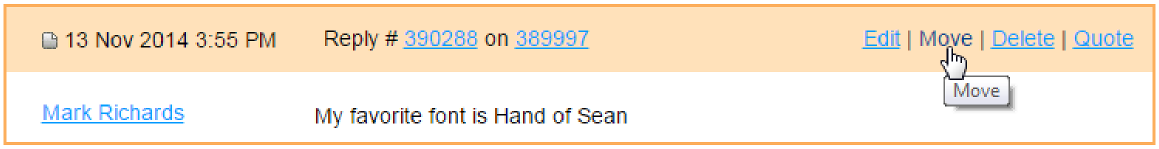
To delete a forum reply – either in admin view or public view – display it then click the **Delete** link above the reply.



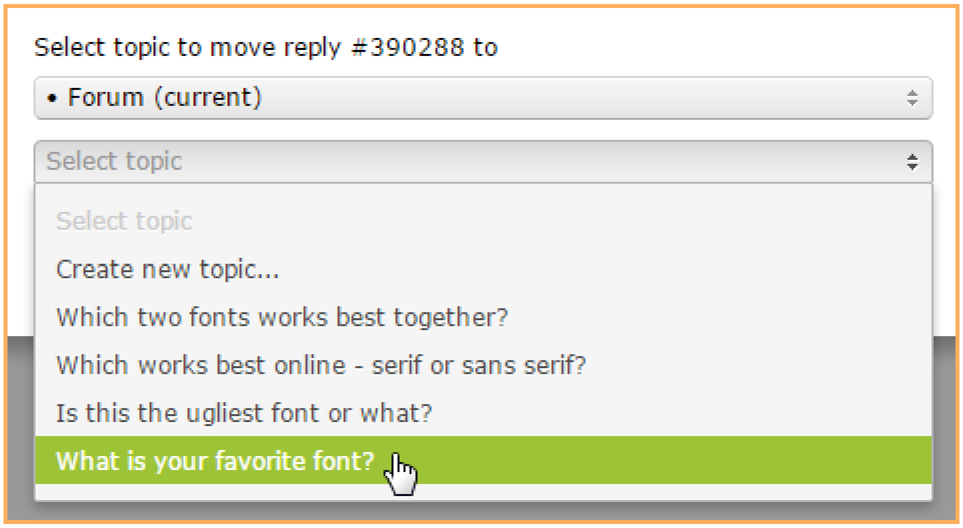
Moving replies

To move a reply to another forum topic, display the topic in admin view then click the **Move** option above the reply.

Read more/less



From the dialog that appears, choose the forum topic you want to move the reply to (and the forum name, if the topic resides in a different forum).



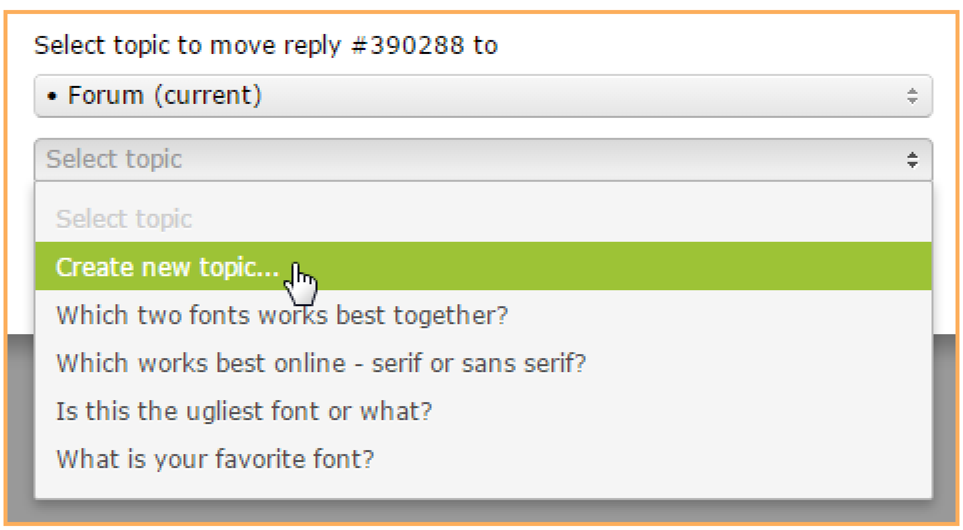
Subscribers to the selected topic will receive an email notification of a new reply.

Creating a new topic from a reply

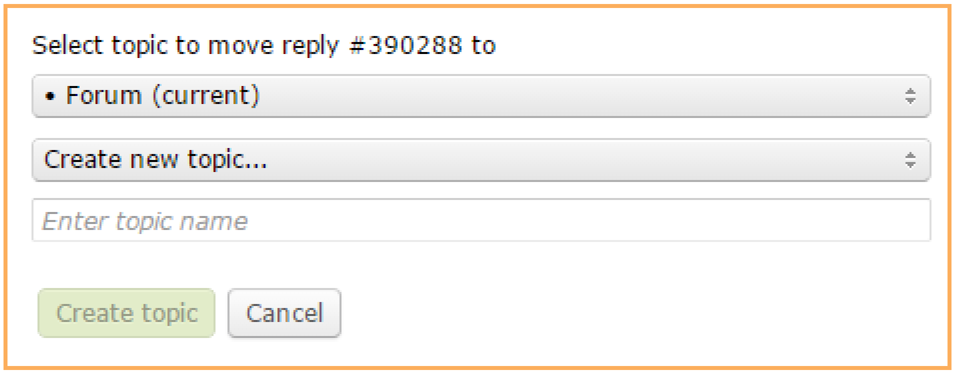
To create a new forum topic from a reply, display the topic in admin view then click the **Move** option above the reply.

Read more/less

From the dialog that appears, choose **Create new topic**.



In the field that appears, enter the name of the new topic then click the **Create topic** button.



Subscribers to the forum will receive an email notification of a new topic.

Forum topic limits

Item	Limit
Subject	500 characters
Body	50Kb or 51200 characters
Author name	100 characters

Setting up discussion forums 6:56

Managing forum replies 4:04

On this page:

- Who can do what in a forum?
- Adding a discussion forum to a page
- Adjusting discussion forum settings
- Enabling anti-spam settings
- Adding a title and description

        - subscription settings
    - Managing forum topics and replies
        - Modifying topics
        - Deleting topics
        - Moving topics
        - Merging topics together
        - Modifying replies
        - Deleting replies
        - Moving replies
        - Creating a new topic from a reply
    - Forum topic limits

See also:

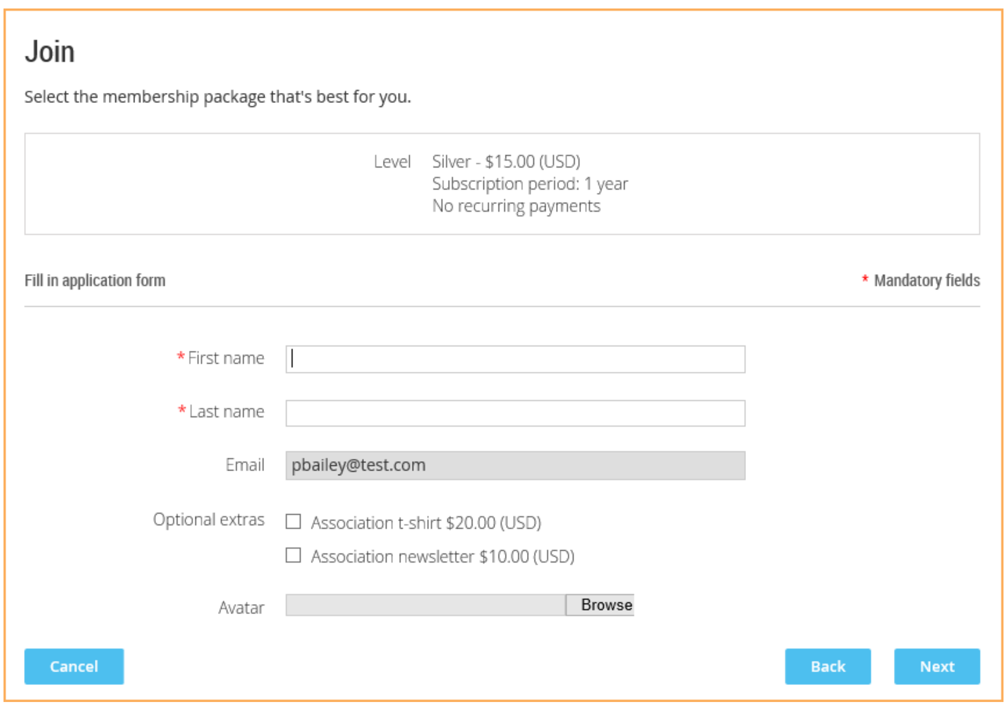
- Customizing forums using CSS
- Adding Wild Apricot functionality to other websites
- Forum widget
- Forum summary widget

Membership application form

Membership application form

Using a membership application form, visitors to your Wild Apricot site can apply for membership in your organization from their computer or mobile device.

The membership application form consists of two main parts: the initial screen where the applicant choose a membership level, and the membership application form.



The initial membership application screen is automatically populated using the membership levels you have set up. The membership application form that follows is automatically assembled using the common fields and membership fields you have set up. The instructions for setting up your membership levels, common fields, and membership fields appear in the sections below. As well, you can adjust the membership application gadget settings to control which membership levels appear on the form.

You can have multiple membership application forms on your site, and adjust the settings on each application form so that only specific membership levels are shown.

Membership application forms – like other site content – are inserted as gadgets, in this case, a membership application gadget. You cannot add a membership application gadget – or any other singular gadget – to a page template or system page, or to a page containing another singular gadget.

> You can embed a Wild Apricot membership application form into another website using widgets.

Once the application is submitted by a prospective member, the new member record is automatically added into your database and a number of automatic actions take place. Among other actions, an application invoice is generated, and password and application initiation emails are sent.

Setting up the membership application form

Setting up the membership application form involves the following steps.

Setting up membership levels

Read more/less

You can create as many membership levels as you want, each with its own pricing, subscription periods, and renewal policies. To set up your membership levels, click the **Levels** option under the **Members** menu. A membership level will appear on the membership application form if its **Public can apply** option is enabled. For more information, see Membership levels.

Setting up database fields

Read more/less

The fields that appear on the detail page of the membership application form are drawn from your membership fields and common fields. You can create custom membership fields and restrict them to specific membership levels. You can also create common fields that apply to all Wild Apricot forms (for example, event registration forms).

To customize your membership fields, hover over the **Members** menu and click the **Membership fields** option. To customize common fields, hover over the **Contacts** menu and click the **Common fields** option.

> You can add field instructions to explain what each field on the membership application form represents. For more information, see Adding field instructions.

Setting up online payments

Read more/less

To enable online payments for the membership application form:

1. Hover over the **Settings** menu and select the **Finances** option.
2. Click the **Payment settings** option.
3. Check the **Enable online payment** option.
4. Select an online payment system and provide your account details.

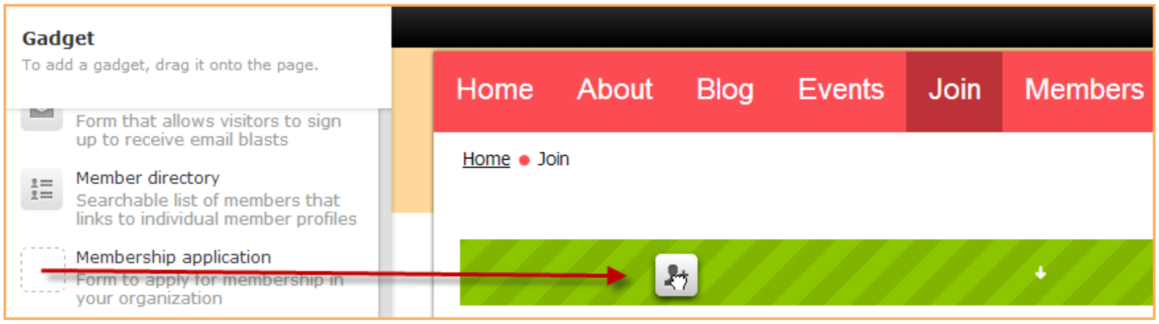
For more information, see Online payments.

Adding a membership application gadget

Read more/less

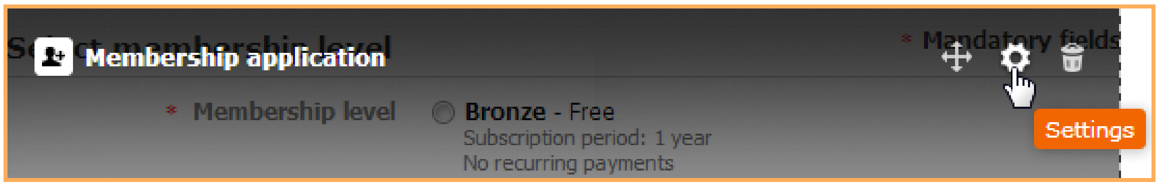
To add a membership application form to a page on your Wild Apricot site, follow these steps:

1. Go to **Sites pages** (under the **Website** menu) and create or begin editing the site page where you want the application form to appear.
2. Click the **Gadgets** icon to display the list of available gadgets.
3. Drag the membership application gadget from the list, and drop it where you want it to appear on the page. You can insert it into a section within a layout, or above or below a layout.



When a layout cell or placeholder is empty, a **Drop gadget or layout here** prompt will be displayed. When you drag a gadget over an empty layout cell or placeholder, it turns green, indicating that you can drop the gadget there. When you drag a gadget above or below a layout, a prompt will appear indicating that you can drop the gadget before or after the layout.

4. After you have dropped the gadget in the desired location, hover your pointer over it and click the **Settings** icon.



5. From the gadget settings panel on the left, choose the desired settings for your membership application form. Among other things, you can control which membership levels are available. For more information, see Adjusting membership application form settings (below).
6. Click **Save** to save the changes to the page.

For instructions on restricting access to the page, see Page access and visibility.

Adjusting membership application form settings

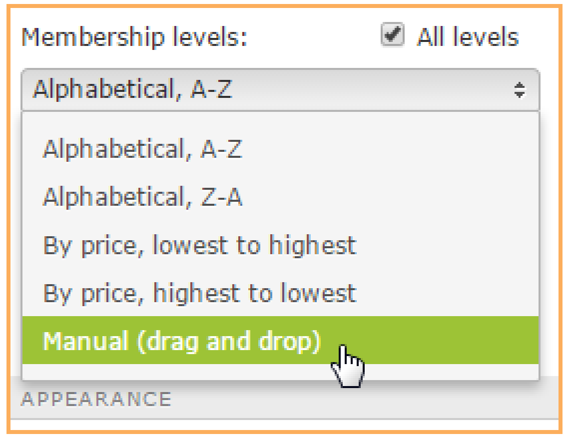
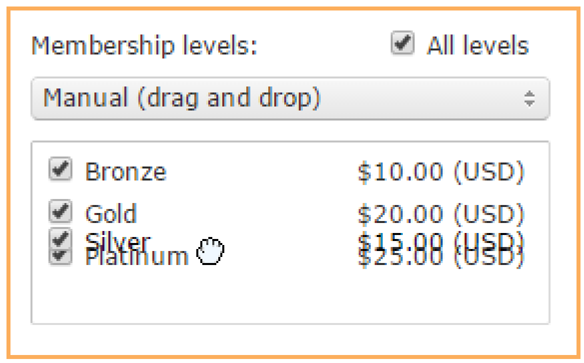
Read more/less

Now that you have added a membership application gadget to your page, you can adjust the gadget settings.

Gadget settings appear in a panel on the left side (which can be hidden to maximize the page design area). To display the settings panel, you position your pointer over the gadget – while editing a site page or a page template – then click the gadget's **Settings** icon.

The following settings are available for membership application gadgets:

Setting	Description

Membership levels	Choose the membership levels to be included on the application form, and the order in which you want them to appear. You can sort membership levels alphabetically or by price, in ascending or descending order, or you can choose the **Manual** sorting option...  ...and determine the order manually by dragging and dropping levels within the list. 
Margins	The amount of space – in pixels – that appears outside the gadget. You can set top, bottom, left, and right margins separately.
HTML ID	A unique identifier by which the gadget can be referenced within custom CSS or JavaScript code. The identifier is automatically generated but can be replaced with a more readable or memorable one (e.g. MyApplicationFormGadget).
CSS class	The name of a CSS class defined on the CSS customization scre en.
Inline style	CSS code to control the behavior or appearance of the gadget. For example, you could enter *width: 250px;* to control the gadget width.

Adding a description

Read more/less

You can add a description to your membership application form by inserting a content gadget ahead of the membership application gadget. Within the content gadget, you can add a title and description, and format them using text styles. For more information on adding and formatting text, see Using the content editor.

Adjusting colors and fonts

Read more/less

You can change the colors and text styles used on your membership application form from the Colors and styles screen. For a complete list of the elements you can modify, click here.

Any changes you make will be applied to other gadgets that use the same settings.

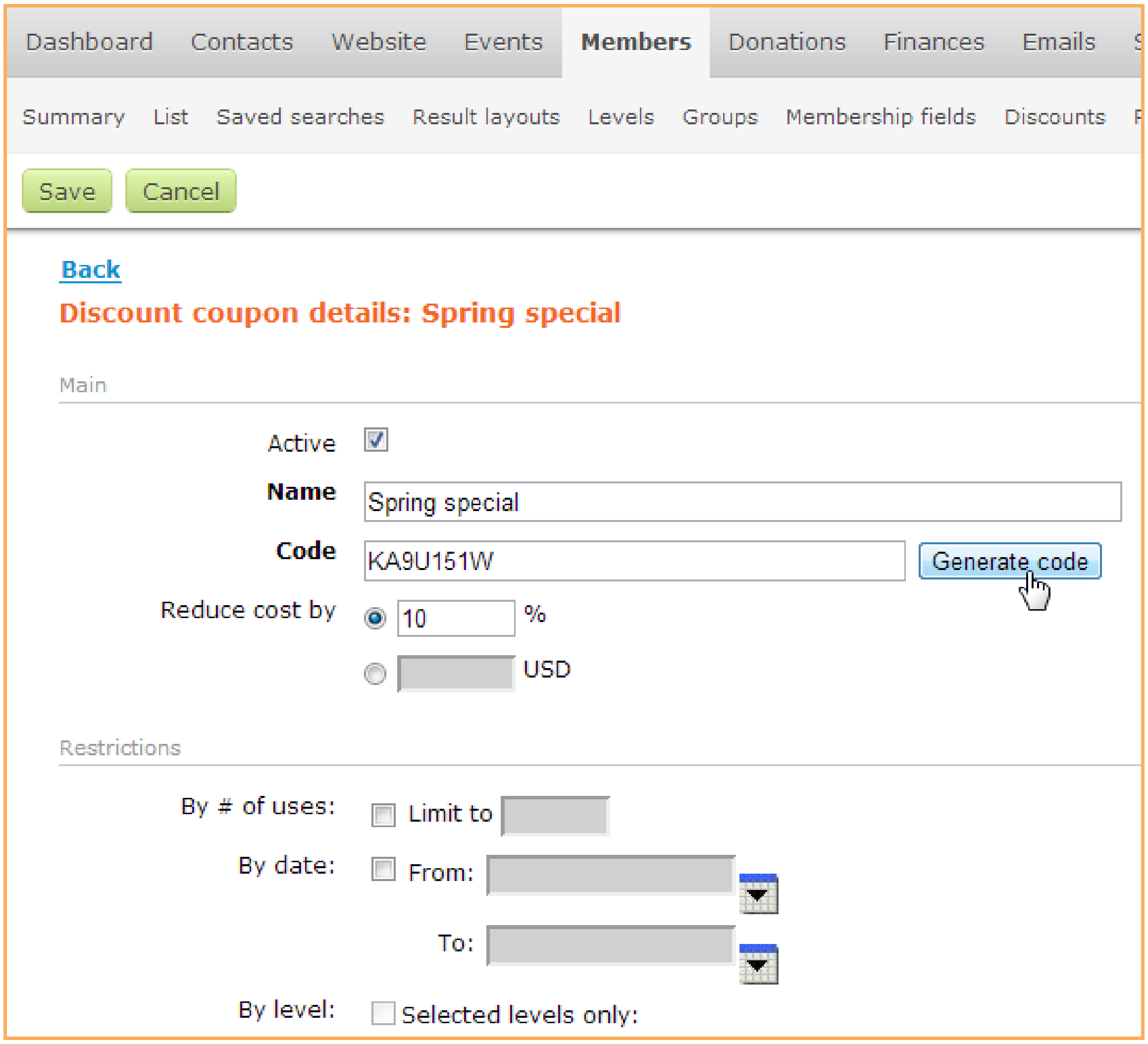
Setting up membership discounts

Read more/less

Discounts for online membership applications can be set up using membership discount coupons.

> You cannot use membership discount coupons for free membership levels, or for levels that use automatic recurring payments.

To create a discount for membership applications, hover over the **Members** menu and select the **Discounts** option. From the **Discount coupons** screen, you can create discount coupons, and enter or generate the coupon code.



For more information, see Discounts for online membership applications.

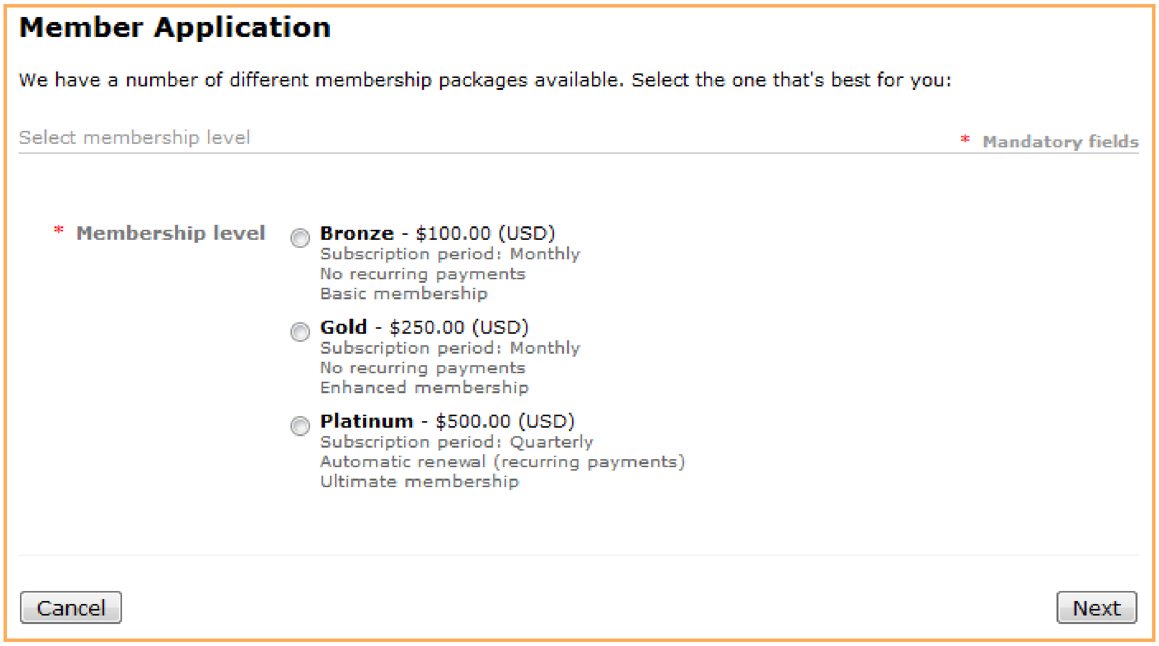
Using the membership application form

There can be several steps involved in applying for membership in your organization.

Selecting the membership level

Read more/less

If there are multiple membership levels, the first step of the application process is selecting the membership level.



Only membership levels with the **Public can apply** setting enabled will appear. (You may have created levels where members can only be added manually by an administrator. For more information, see Membership levels.)

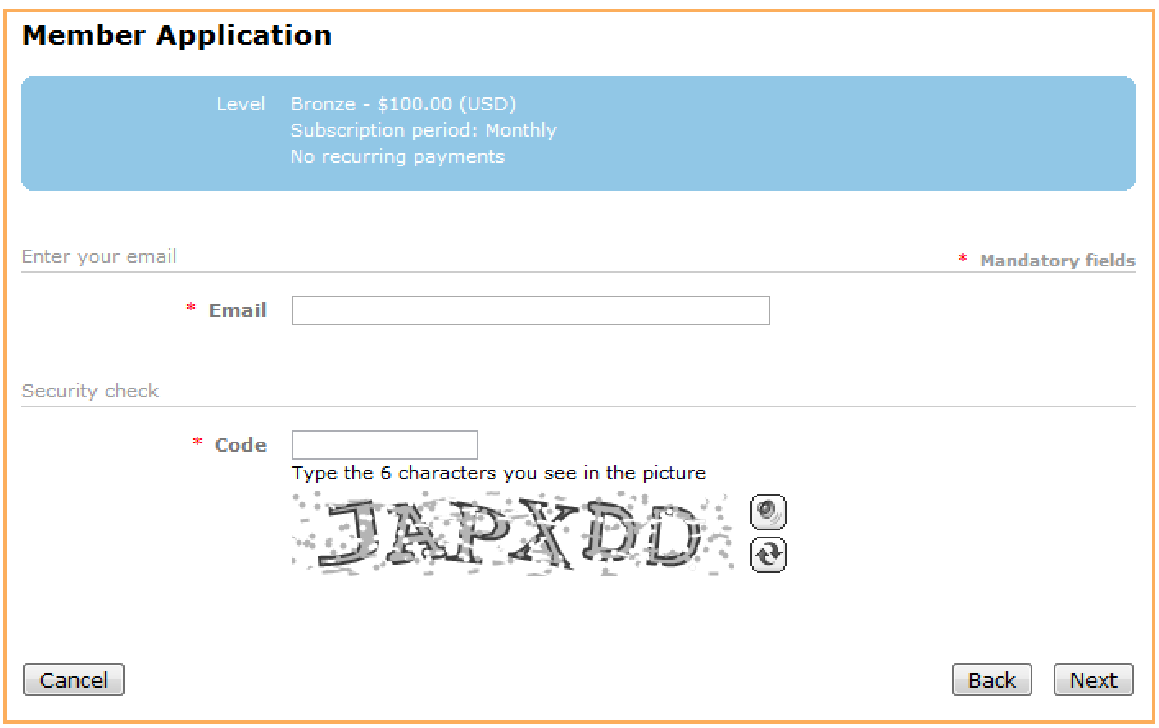
For each membership level, the following information is displayed:

- Subscription period
- Renewal policy
- Description

Entering an email address

Read more/less

The next step is to enter an email address. If enabled, a Captcha anti-spam section will appear.



If the applicant's email address already exists in your contact database – because they had registered for an event or made a donation – they will be prompted to log in before proceeding.

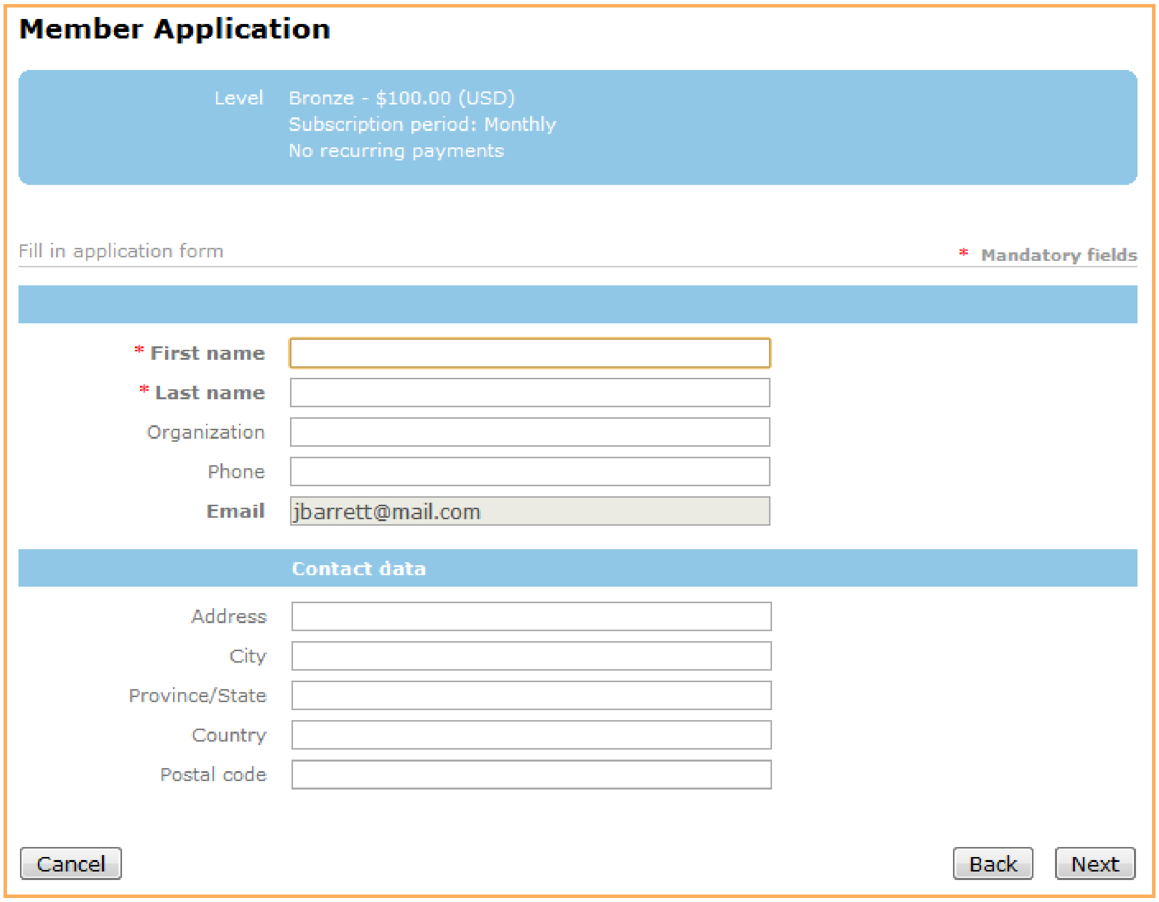
Filling in details

Read more/less

After clicking the **Next** button, the prospective member enters membership details in the fields provided. The fields are drawn from the following sources:

- Common fields – These fields are common to all contacts and forms and display regardless of the level being applied to.
- Membership fields – These are additional fields that apply to members only. All custom membership fields can be restricted to specific member levels only so different member levels can have different fields.

The common fields are shown at the top while the membership fields are shown below.



If the selected membership level that has a discount code associated with it, a **Discount code** field will appear on the detailed application form where the applicant can enter the discount code.

Finalizing the application

Read more/less

What happens next depends on the payment method chosen when the membership level was set up.

- If only offline payment was enabled, then the applicant will have the option of cancelling or confirming the application. If the applicant clicks the **Confirm** button, an invoice will be emailed to them, and a membership application summary will be displayed. From the application summary, the applicant can choose to view or pay the outstanding invoice.
- If only online payment is enabled, then a **Pay online** button will appear. Clicking the **Pay online** button will take the applicant to the online payment screen for your site's payment provider.
- If both online and offline payment is enabled, then two buttons will be displayed: **Pay online** and **Invoice me**. Clicking the **Pay online** button will take the applicant to the online payment screen for your payment provider. Clicking the **Invoice me** button will result in the applicant being emailed an invoice – which they can pay online or offline – and a membership application summary being displayed. From the application summary, the applicant can choose to view or pay (online) the outstanding invoice.

> When paying using PayPal Payments Pro, the **Pay online** button with be replaced with two buttons: **Pay with credit card**, and **PayPal Express checkout**.

In all cases, a new contact record is added to your database. Depending on your membership level settings, the application may have to be approved by administrator option and/or payment may have to received in full before the membership is activated.

As well, a number of emails may be automatically sent to the applicant:

- An invoice is automatically generated. An invoice email will only be sent if the online payment is **not** completed within 15 minutes of submitting the membership application. Within your invoice and receipt settings, you can disable invoice emails completely.
- A password is automatically generated and emailed. The password email can be customized from **Settings > Contacts > Password email**.
- Depending on the membership level settings, an application initiation email can be sent.

If online payment is initiated but not completed, the transaction will stay marked *In progress* for 24 hours, after which it will be automatically marked as *Probably abandoned*. You can search for contacts with failed payment using the **Attention required** filter and typing **abandoned** into the search field.

On this page:

Expand all sections

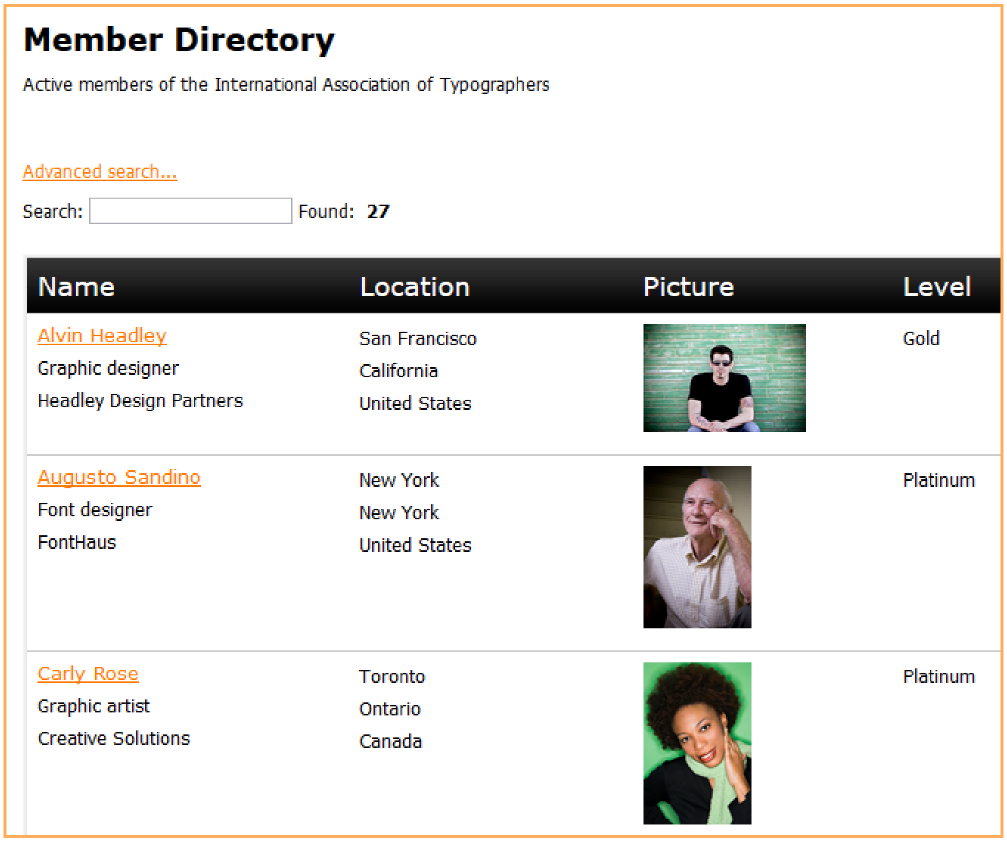
See also:

- Getting started with membership management
- Membership levels
- Membership renewal settings
- Membership application gadget
- Membership application widget
- Adding Wild Apricot functionality to other websites
- Discounts and complimentary transactions

Member directory

Member directory

You can add a member directory to a page on your Wild Apricot site, allowing visitors to see a list of your members, search for members, and view member profiles.



Clicking on a member listing within the directory will display that member's profile (subject to their privacy settings).

Member directories – like other site content – are inserted as gadgets, in this case, a member directory gadget. You cannot add a member directory gadget – or any other singular gadget – to a page template or system page, or to a page containing another singular gadget.

> ⚠ You can embed a Wild Apricot members directory into another website using widgets.

You can control which members appear in the directory, restricting the list by membership level or saved searches. You can create multiple member directory pages, each with different settings. For example, you could set up different member directories for members and non-members, or for different regions.

> Whether a member appears in the directory also depends on that member's privacy settings.

In addition to controlling which members are displayed in the list, you can control which fields are displayed for each member and the order in which member records are sorted.

You can restrict access to the member directory by membership level or member group as part of the page settings.

Adding a member directory

To add a member directory to a page on your Wild Apricot site, follow these steps:

Read more/less

1. Go to **Sites pages** (under the **Website** menu) and create or begin editing the site page where you want the member directory to appear.
2. Click the **Gadgets** icon to display the list of available gadgets.
3. Drag the member directory gadget from the list, and drop it where you want it to appear on the page. You can insert it into a section within a layout, or above or below a layout.

   When a layout cell or placeholder is empty, a **Drop gadget or layout here** prompt will be displayed. When you drag a gadget over an empty layout cell or placeholder, it turns green, indicating that you can drop the gadget there. When you drag a gadget above or below a layout, a prompt will appear indicating that you can drop the gadget before or after the layout.
4. After you have dropped the gadget in the desired location, hover your pointer over it and click the **Settings** icon.

5. From the gadget settings panel on the left, choose the desired settings for your member directory. You can control which member records are displayed and in what order, and which fields are displayed for each member and in what order. For more information, see Adjusting member directory settings (below).
6. Click **Save** to save the changes to the page.

For instructions on restricting access to the page, see Page access and visibility.

Adjusting member directory settings

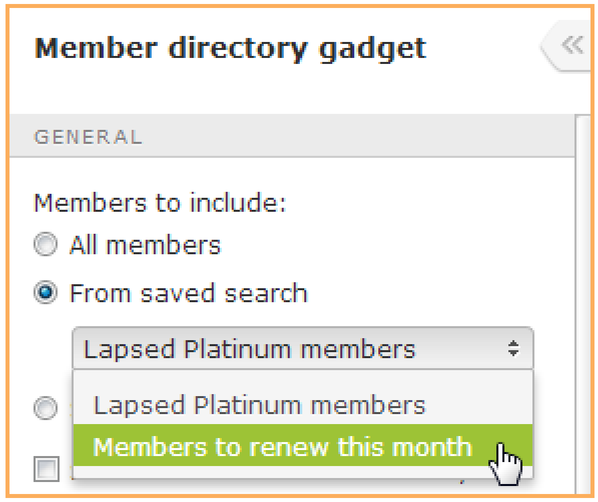
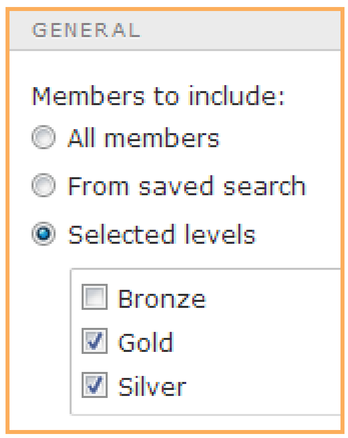
Now that you have added a member directory gadget to your page, you can adjust the member directory gadget settings to control – among other things – which member records are displayed and in what order, and which fields are displayed for each member and in what order.

Gadget settings appear in a panel on the left side (which can be hidden to maximize the page design area). To display the settings panel, you position your pointer over the gadget – while editing a site page or a page template – then click the gadget's **Settings** icon.

Controlling who appears in the directory

To control the kinds of members to be included in the member directory, choose from the following options under **Members to include** within the member directory gadget settings:

Read more/less

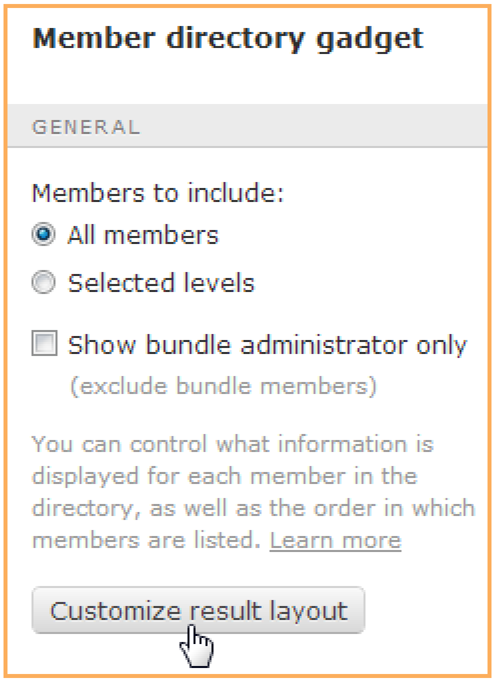
Option	Description
All members	Include all members.
From saved search	Use a saved member search to limit members to those that match the saved search criteria. When you choose this option, you can choose from a list of your saved member searches.  This option will only appear if you have a saved member search.
Selected levels	Restrict the list to members at selected membership levels. When you click this option, you can choose one or more membership levels to be included in the directory. 
Show bundle administrator only	Indicates whether to include only bundle administrators and exclude individual members of bundles. The profiles of individual bundle members will still be accessible from the bundle administrator's profile even if individual members are excluded.

Setting the sorting order

To control the order in which members are listed in the directory, follow these steps:

Read more/less

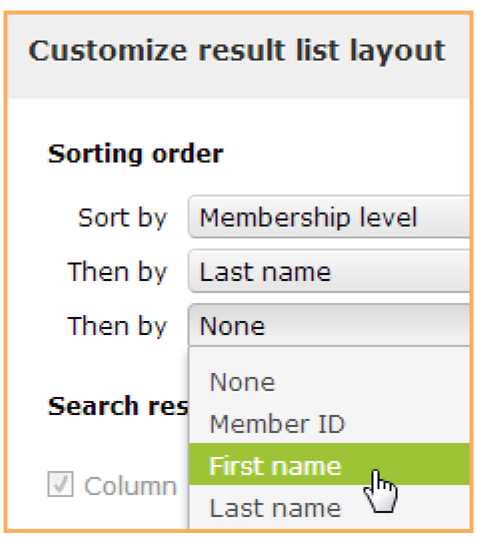
1. Within the member directory gadget settings, click the **Customize result layout** button.



2. On the dialog that appears, click the **Sort by** drop-down under **Sorting order** and choose the field to sort the member records by. You can choose any common or membership fields except multi-line text, radio button, or multiple choice fields.

   > ⚠ The sort order field must have its member privacy settings set to **Anybody**. If you want to restrict access to the field, you can restrict access within its field settings.

   You can choose to sort in ascending or descending order. If you want to display matching records in random order, select the **Random** option instead of a field.
3. Optionally, choose up to 2 more fields to sort by from the **Then by** drop-downs. The records will be displayed in order according to the values of the first field, then any duplicate values will sorted by the second field, and so on. For example, you might want to sort by membership level then by last name, and finally by first name.



4. Click **Apply** to apply your changes.
5. Click **Save** to save changes to the page.

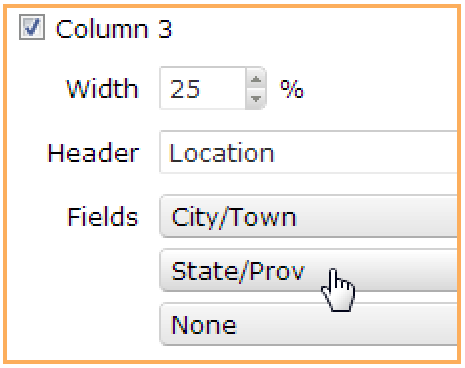
Controlling the information displayed for each member

To control what information is displayed for each member in the directory, follow these steps:

Read more/less

1. Within the member directory gadget settings, click the **Customize result layout** button.

2. Within the **Search results layout** area on the dialog that appears, you can choose up to 4 columns to be displayed for each member, and pick up to 3 database fields to be combined in each column. For example, you could combine first name and last name in column 1; organization and email address in column 2; and city and state in column 3. For each column, you can specify the column width and the column heading.



3. Click **Apply** to apply your changes.
4. Click **Save** to save changes to the page.

When searching for members using the simple search, only those columns you choose here will be searched. Information stored for a contact but not displayed on the screen cannot be used to find matching members.

For each column, you can also specify the column heading and control the column width.

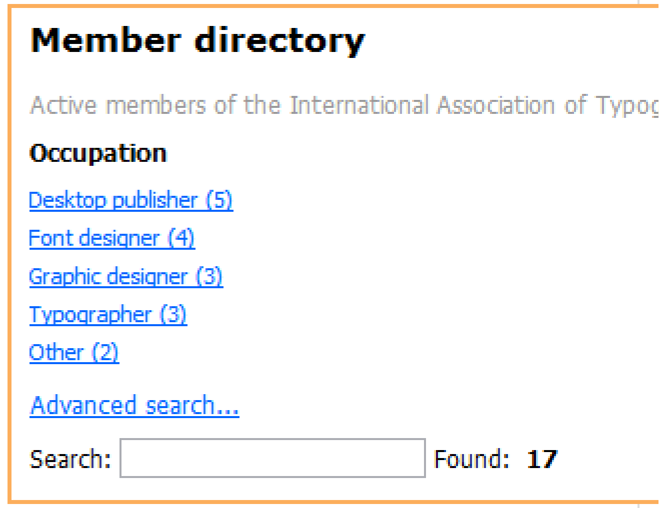
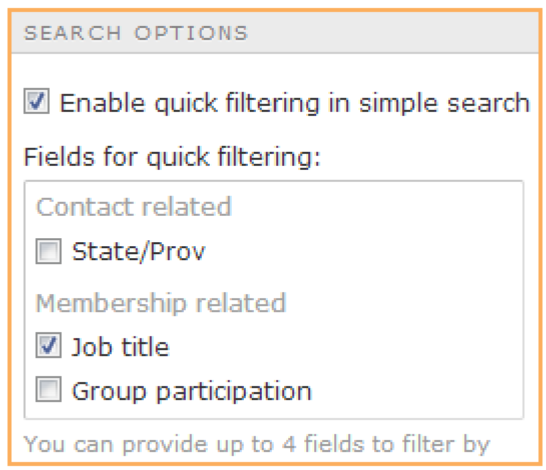
The first field of the first column will automatically appear as a link to the member's public profile page.

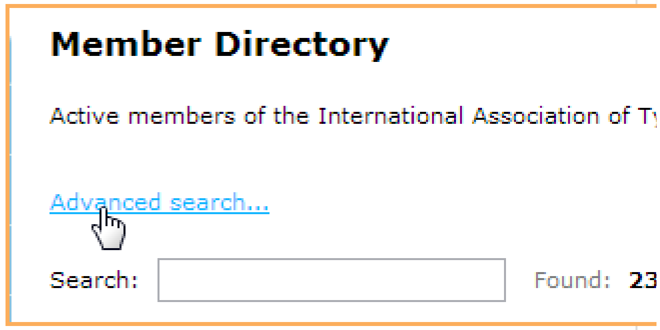
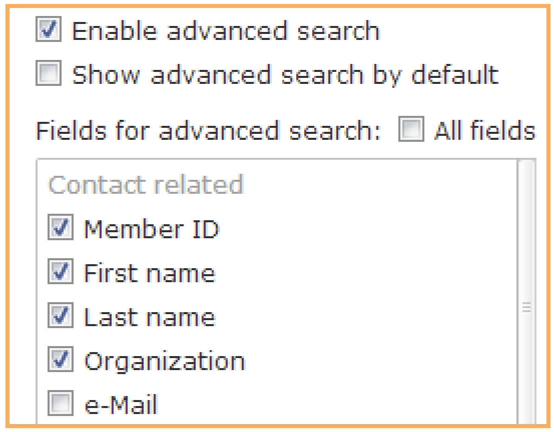
Controlling search options

To control how visitors can search the member directory, enable or disable the following options under **Search options** within the member directory gadget settings.

Read more/less

Option	Description

Enable quick filtering in simple search	Allows visitors to filter the member list by selecting a particular field value.  When you enable this option, you can choose up to 4 contact or membership fields – multiple choice, radio buttons, and dropdown field types only – for the visitor to use to filter the list. 

Enabled advanced search	Controls whether an **Advanced search** option is available from the member directory.  If the advanced search option is enabled, you can choose the fields to be available for visitors to search by. 
Show advanced search by default	Choose whether the member directory is initially displayed with advanced search fields rather than a link to the advanced search function. 

Other settings

The following settings are also available for member directory gadgets:

Read more/less

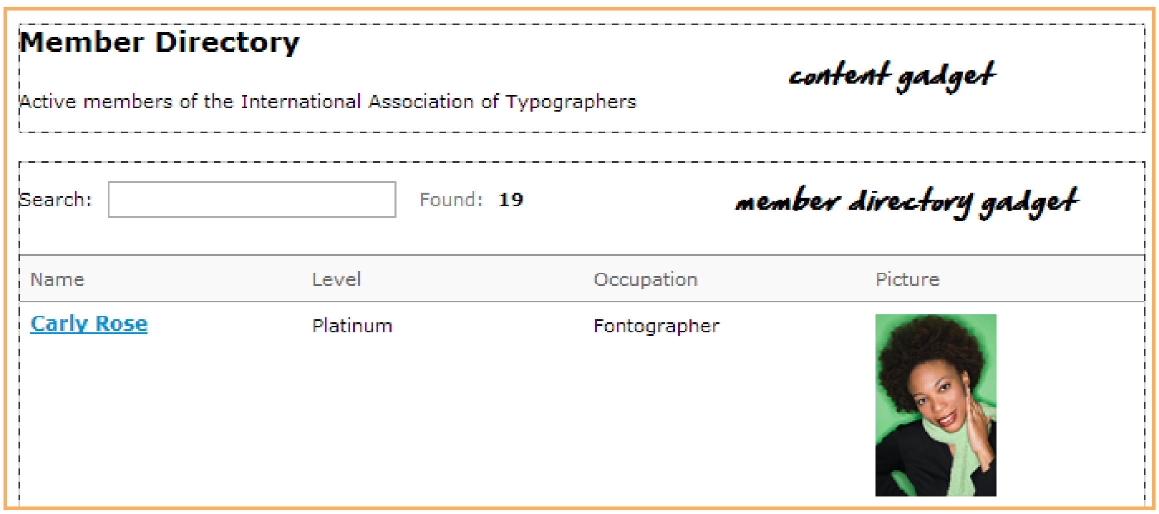
Setting	Description
Margins	The amount of space – in pixels – that appears outside the gadget. You can set top, bottom, left, and right margins separately.
HTML ID	A unique identifier by which the gadget can be referenced within custom CSS or JavaScript code. The identifier is automatically generated but can be replaced with a more readable or memorable one (e.g. MyMemberDirectoryGadget).
CSS class	The name of a CSS class defined on the CSS customization scre en.
Inline style	CSS code to control the behavior or appearance of the gadget. For example, you could enter *width: 250px;* to control the gadget width.

Adding a title and description

You can add a title and description for a member directory by inserting a content gadget ahead of the member directory gadget.

Read more/less

Within the content gadget, you can format the title and description using text styles.



For more information on inserting text and using text styles, see Using the content editor.

Changing colors and fonts

You can change the colors and text styles used on your member directory from the Colors and styles screen. For a complete list of the elements you can customize, click here. Any changes you make will be applied to other gadgets that use the same settings.

Privacy options

Both members and site administrators can control the kind of information exposed to the public through the member directory. Members can control whether their profile is viewable by others, and if so, which fields are viewable by members and non-members. Members who have set their profiles to private will not appear in the member directory at all. (For more information, see Member privacy settings.)

Administrators can control which fields appear in the member database, and which of these are viewable by members and non-members.

Troubleshooting

Selected fields not appearing in directory

If the fields you have selected within the **Search results layout** section are not appearing in your member directory, check the following:

- the access settings for the selected field(s)
- the member privacy settings for the field(s)

Members not sorted by selected sorting field

If the members in the directory aren't being sorted by the sorting field you chose, check the member privacy settings for that field. It needs to be set to **Anybody** to work as a sorting field. If you want to restrict access to the field, you can restrict access within its field settings, but only after checking the field's privacy settings (since privacy settings are not displayed for admin-only fields).

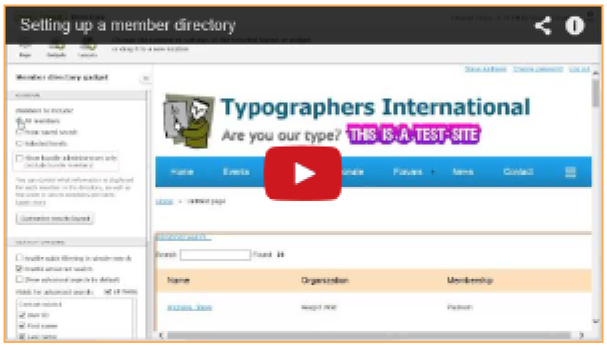
Member directory not sorting in the chosen order

Sometimes when you set your member directory to sort by a particular order – say, alphabetical order – it stills displays members in random order. To fix this, change the sorting order to anything else, save your changes, then go back and set the order to your desired option. Once you save this change, the member directory should sort members in the order you chose.

Members not appearing in member directory

To be listed in the member directory the following conditions must apply:

- Member must be in **active** (or **pending renewal**) status.
- Member has agreed to show their profile to others (see Member privacy settings).
- The member belongs to one of the membership levels you have selected to appear in that directory gadget. (See Controlling who appears in the directory.)



Setting up a member directory 5:59

On this page:

Expand all sections

Complete page map

- Changing colors and fonts
- Privacy options
- Troubleshooting

See also:

- Membership levels
- Member privacy settings
- Adding Wild Apricot functionality to other websites
- Member directory widget
- Changing button labels

Member contact form

Member contact form

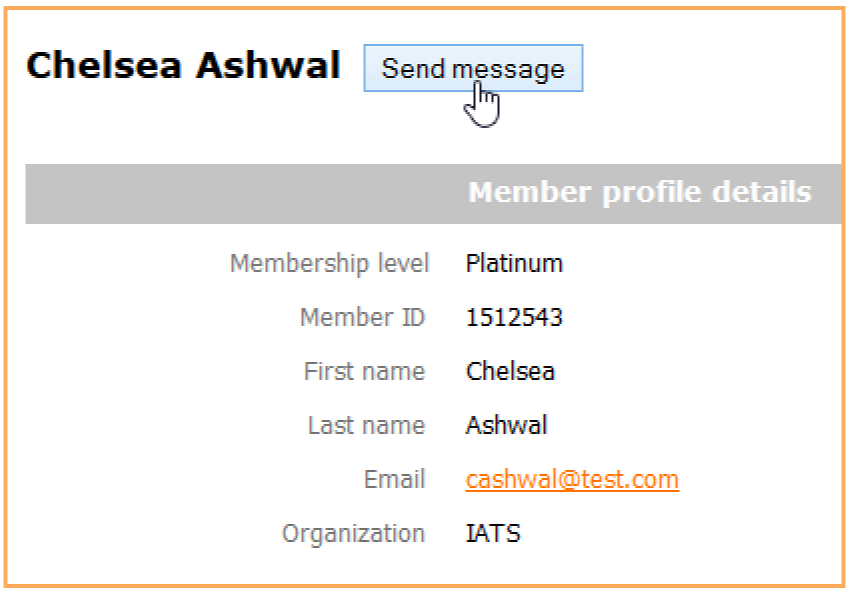
You can enable a member contact form that allows your members to be emailed without revealing their email addresses. In this way, members can be contacted while still maintaining their privacy.

The member contact form can be enabled for all members, or enabled only for selected members. The form can be made visible to members only or to all visitors to your site.

Using the member contact form

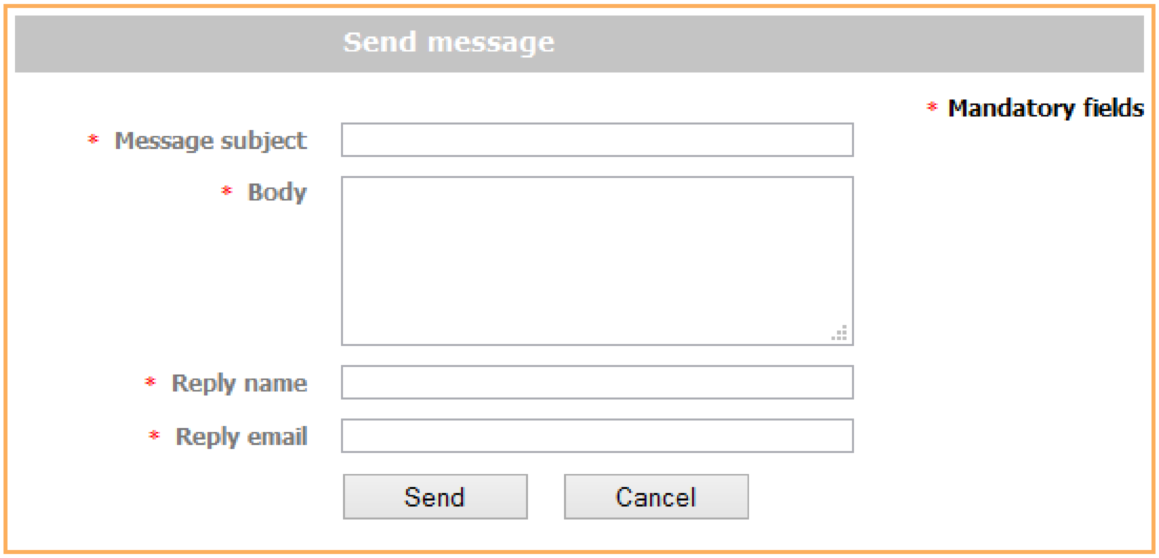
When the member contact form is enabled for a particular member, a **Send message** button will appear within the member's profile.

Read more/less



Visitors to your site can view a member's profile by clicking on the member's listing within a member directory.

Clicking the **Send message** button will display the member contact form.



The member contact form consists of the following fields:

- Message subject
- Body
- Reply name
- Email

Clicking the **Send** button will send an email message to the member from your organization. The message will let them know that they are being contacted from your site and include the information that the visitor filled out on the form. If they wish to contact the correspondent directly, all they have to do is reply to the message in their email program.

The message will be recorded in the email log where it can be viewed by a site administrator.

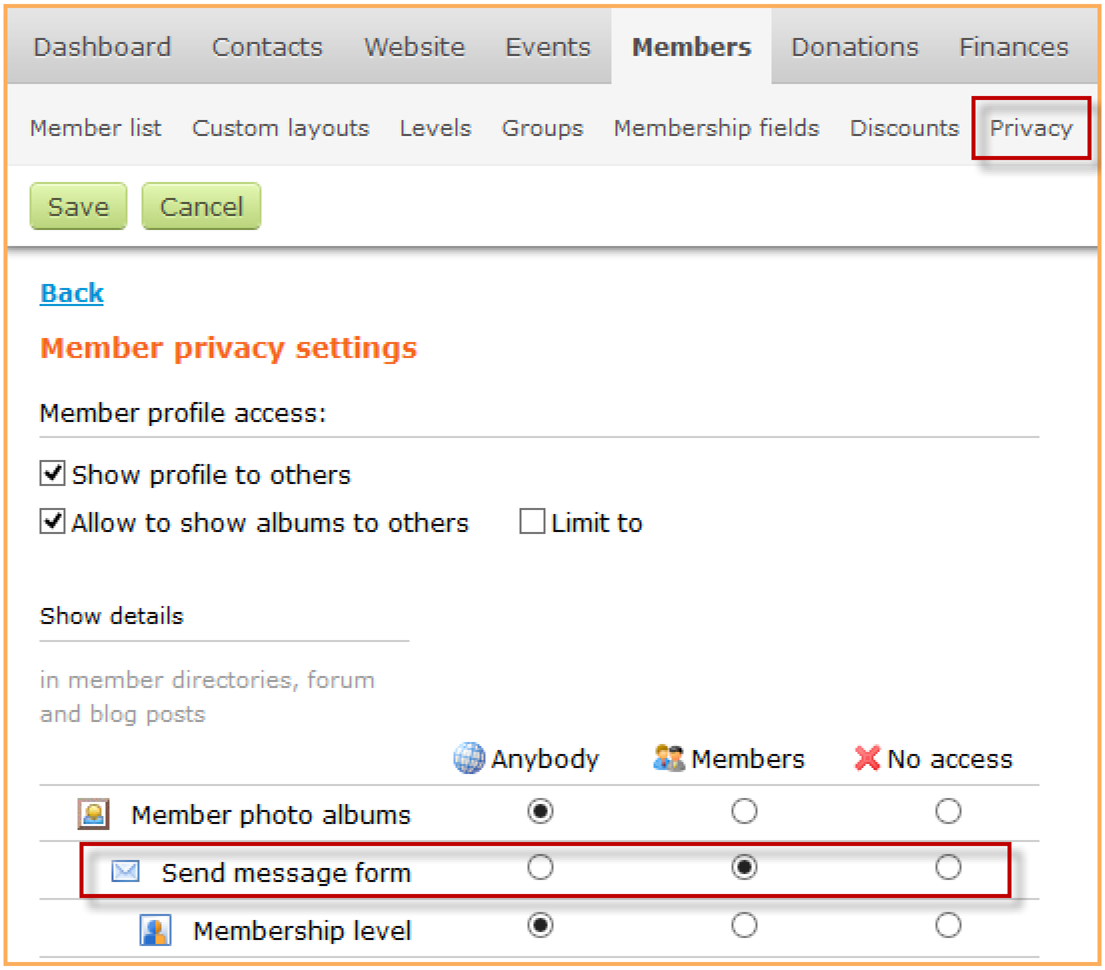
Enabling/disabling the member contact form for all members

You can enable or disable the member contact form for all future members (other than those added through import), and optionally, apply your changes to existing members.

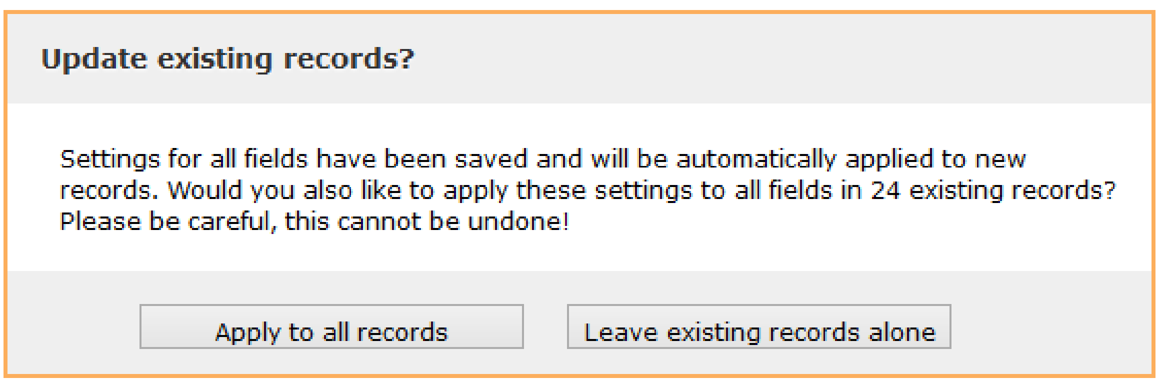
Read more/less

To enable or disable the member contact form for members, follow these steps:

1. Click the **Settings** tab.
2. Click **Member privacy settings** under **Membership settings**.
3. On the screen that appears, click the **Edit** button to enter edit mode.



4. For the **Send message form** setting, choose whether to make the form visible to everyone, to members only, or to no one.
5. When you are finished adjusting the privacy settings, click the **Save** button.
6. You will be asked whether you want to apply these changes to existing records as well as new records.



If you only want to apply these changes to new records, click the **Leave existing records alone** button. If you want to apply these changes to all existing records as well, click the **Apply to all records** button.

7. If you choose to apply the changes to all existing records, you will be asked to confirm the request by entering the word **REAPPLY** in the field provided. After entering the word, click the **OK** button.

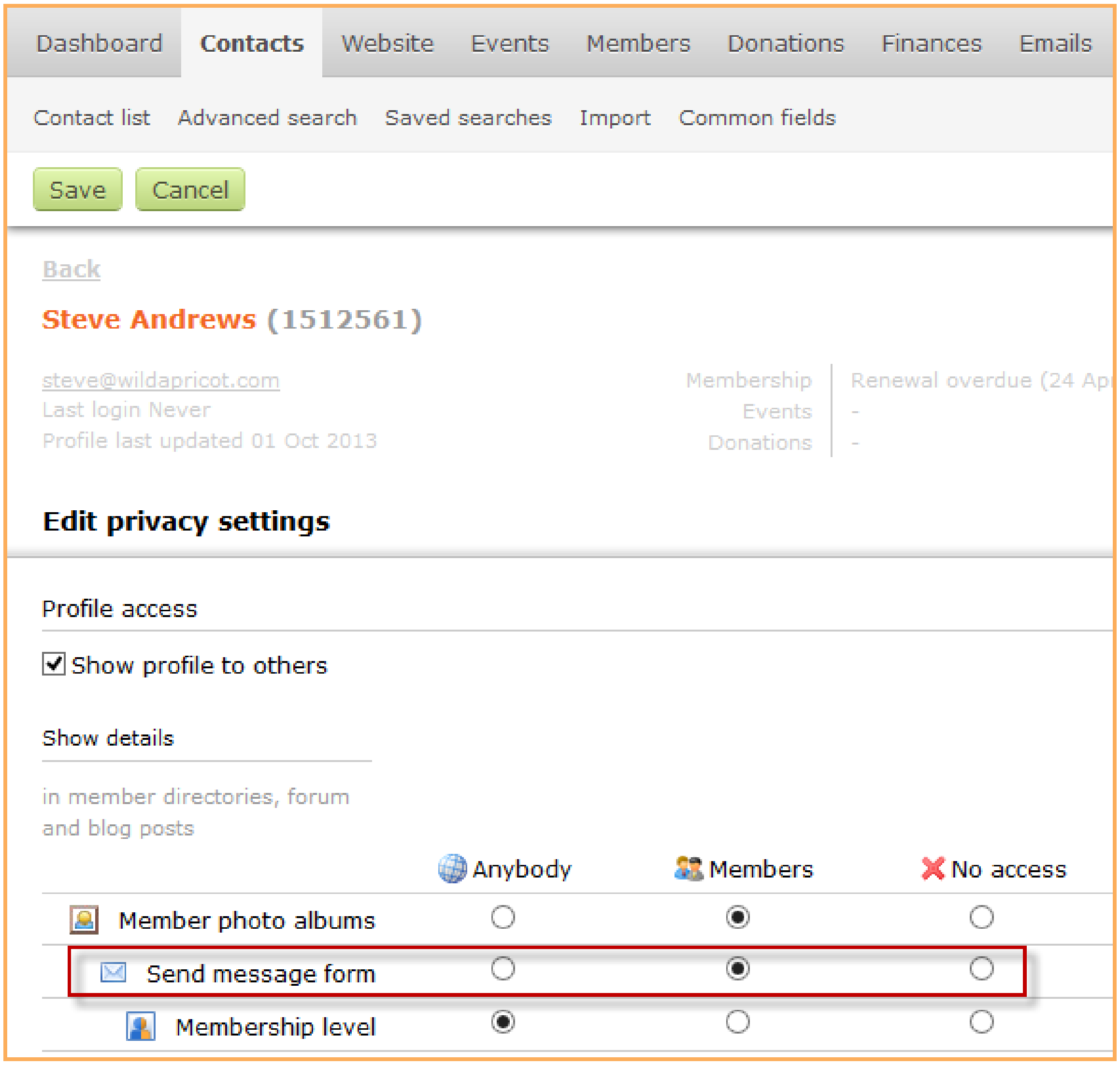
Enabling/disabling the member contact form for individual members

You can enable or disable the member contact form for individual members without affecting the settings for other members.

Read more/less

To enable or disable the member contact form for a particular member, follow these steps:

1. Go to the **Contacts** tab.
2. Find the contact's record.
3. Open the contact's record by clicking on it within the list.
4. Click the **Privacy** tab.
5. Click the **Edit** button to enter edit mode.



6. For the **Send message form** setting, choose whether to make the form visible to everyone, to members only, or to no one.
7. When you are finished adjusting the member's privacy settings, click the **Save** button.

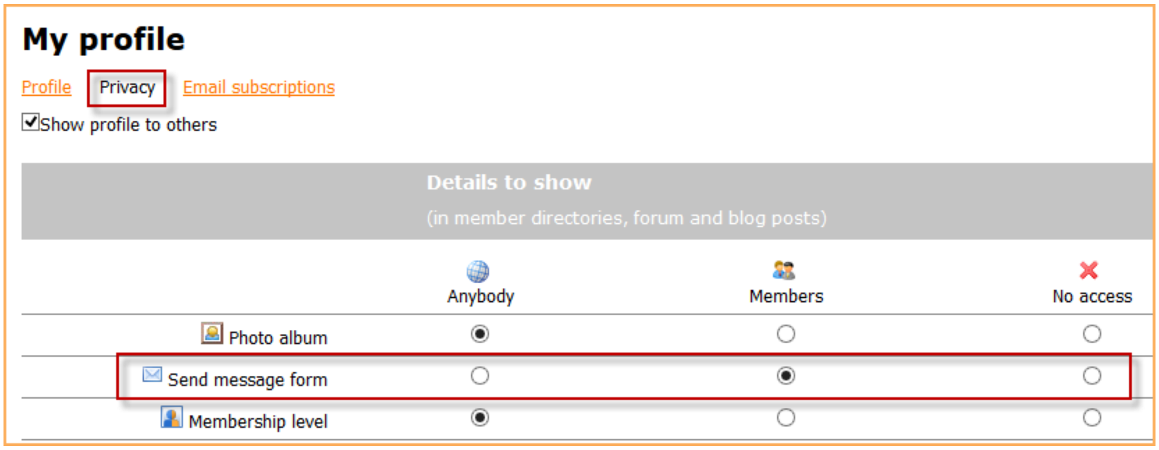
Enabling/disabling the member contact form by members themselves

From the their member profile, members can change their privacy settings, including whether to enable the member contact form.

Read more/less

To change their privacy settings, a member follows these steps:

1. Log into their Wild Apricot account.
2. Go to their member profile by clicking on their name.
3. Click the **Privacy** link.
4. Click the **Edit profile** button to enter edit mode.
5. The member can now choose whether to enable the member contact form.



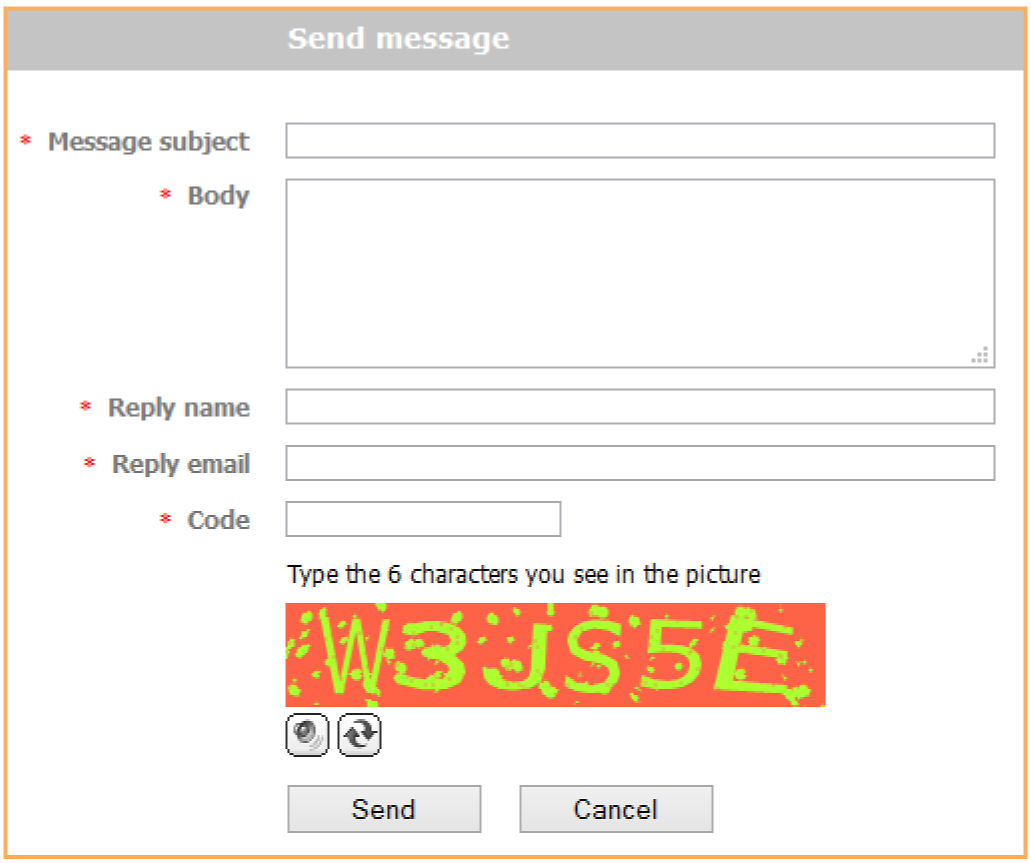
6. Once they are finishing changing their privacy settings, the member clicks the **Save** button.

Enabling anti-Spam settings

To prevent automated software – known as spambots – from using the member contact form to bombard you and your members with spam emails, you can enable Wild Apricot's anti-spam Captcha feature.

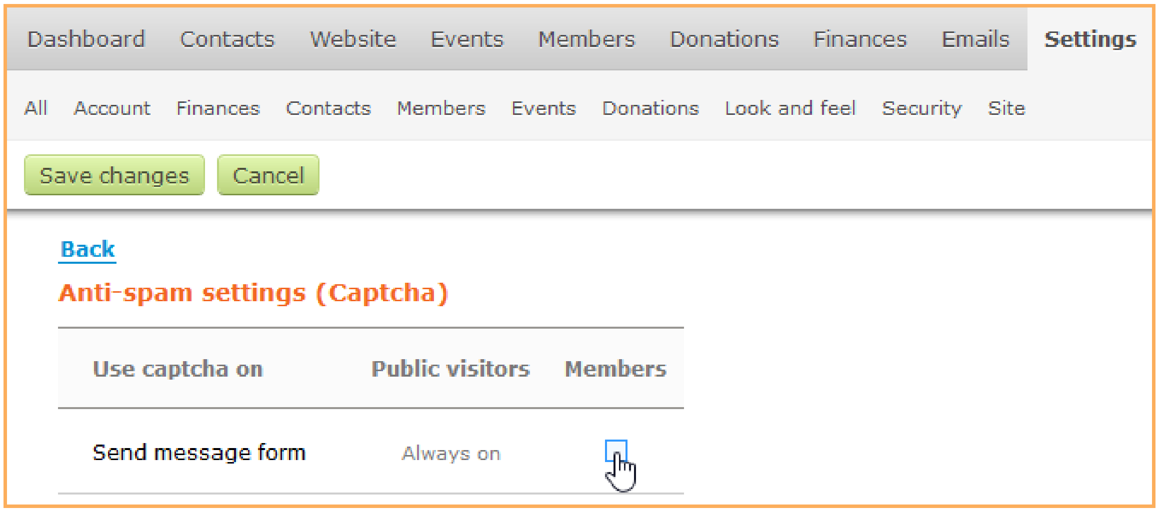
Read more/less

With Captcha enabled, visitors to your site would have to enter a set of characters – proving them to be a person rather than a program – before being able to send the member a message.



The Captcha message is always enabled for visitors using the member contact form. Within your anti-spam settings, you can choose whether to enable it for members as well.

To enable Captcha for members using the member contact form, go to **Settings**, and click **Anti-spam settings (Captcha)** under **Securit y**. On the screen that appears, click the checkbox beside **Send message form** under the Members heading then click **Save changes**.



On this page:

- Using the member contact form
- Enabling/disabling the member contact form for all members
- Enabling/disabling the member contact form for individual members
- Enabling/disabling the member contact form by members themselves
- Enabling anti-Spam settings

Expand all sections

Donation forms

Adding and using donation forms

So that visitors to your site can donate to your organization, you can add a donation form that integrates with your payment system and contact database.

Donation forms – like other site content – are inserted as gadgets, in this case, a donation form gadget. You cannot add a donation form gadget – or any other singular gadget – to a page template or system page, or to a page containing another singular gadget.

> You can embed a Wild Apricot donation form into another website using widgets.

You can choose the donation fields you want displayed on the donation form as part of the settings for the donation form gadget. One of your donation fields is the **Amount** field, a system field that cannot be renamed, deleted, or excluded from the donation form. You can create custom donation fields to allocate a donation to a specific fund or fundraising campaign, or collect information on your donors. Also, you can set the **Amount** field to accept any amount and/or predefined amounts.

If the visitor viewing the donation form is not logged in, common fields will appear on the form as well. You can choose the common fields you want to appear on the form as part of the donation form gadget settings, but you cannot exclude the **Email** field.

> ⚠ Common fields that are set to administrator-only access will not appear.

To enable online donations, you need to set up online payments.

To track the success of your fundraising efforts, you can add a donation goal gadget to a page on your site.

Using the donation form

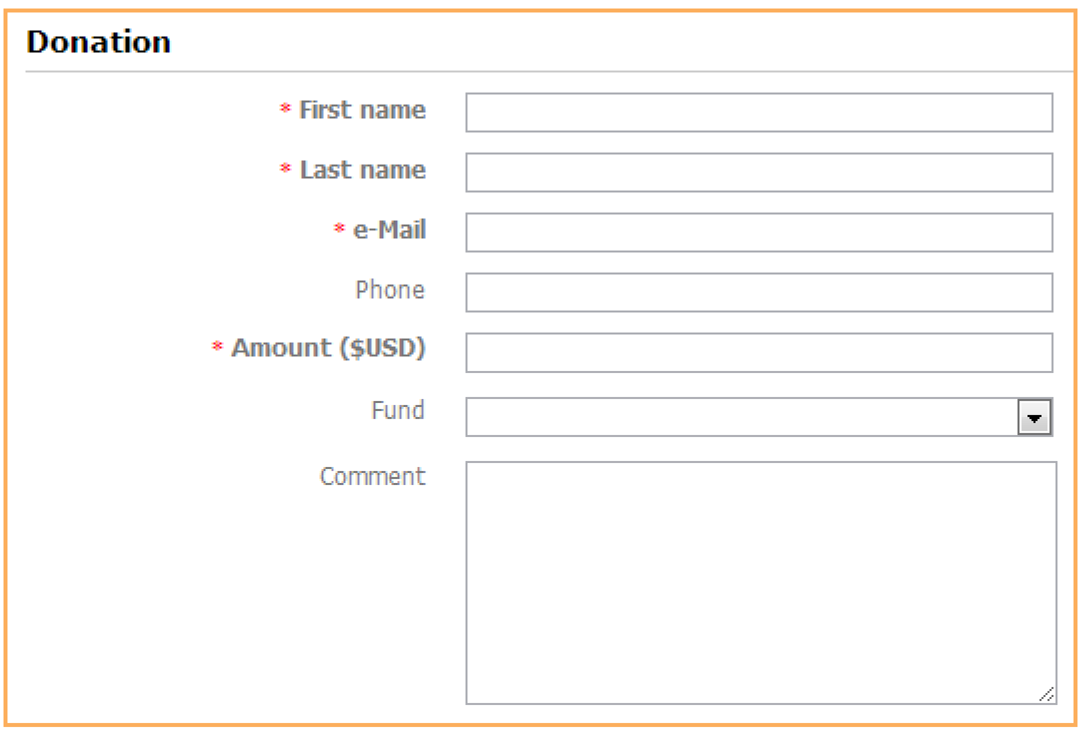
To make an online donation, a visitor to your site fills out the required fields on the donation form and clicks the **Pay** button.

Read more/less

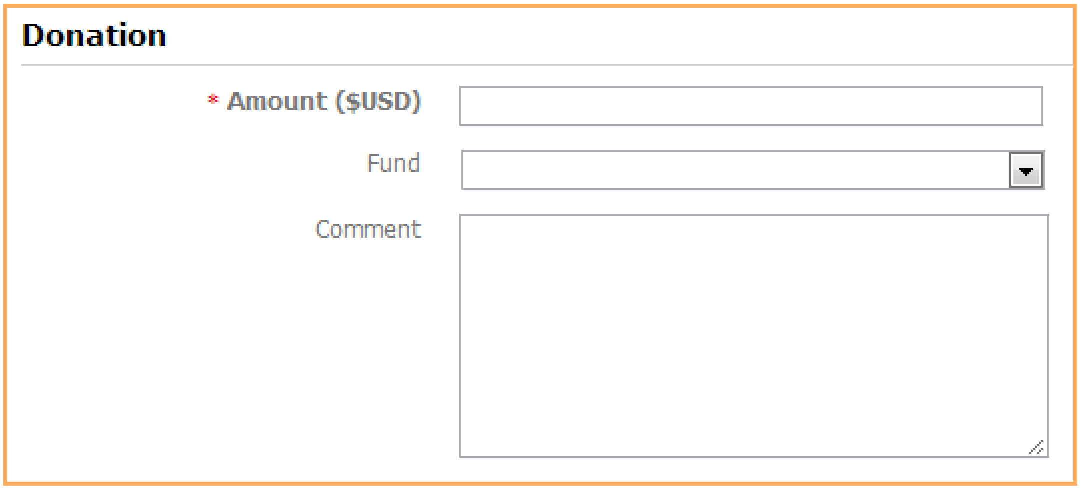
Each donation form consists of:

- the common fields selected within the donation form gadget settings
- the donation fields selected within the donation form gadget settings

If the donor is not logged in, the form will show both the common fields and the donation fields.



If the donor is logged in, the form displays only donation fields (since the system already has contact information for the logged-in donor).



When someone makes a donation without being logged in, their email is used to match them against your existing contacts database. If there is a matching contact, the donation details are linked to their contact record. If there is no matching email, a new contact is created.

> ⚠ Values entered in common fields on donation forms will not update corresponding fields in the donor's contact record, but are stored separately within donation records. See Customizing your common database fields for more information.

Once your payment processor confirms the successful processing of the payment transaction, it will communicate with our server and the donation will be marked as *Confirmed* in the database. A confirmation email and a payment receipt will then be sent to the donor. The donation receipt can be re-printed or re-sent at any time. For instructions on customizing the confirmation email, see Customizing the confirmation email. For instructions on customizing the donation receipt, see Customizing invoices and receipts.

If the payment fails or the visitor abandons the transaction without completing payment, the donation record will have an *In progress* status, and after 24 hours, it will be automatically marked as *Likely abandoned*. You can view these records from the **Donations** screen using *Attention required* and *In progress* filters.

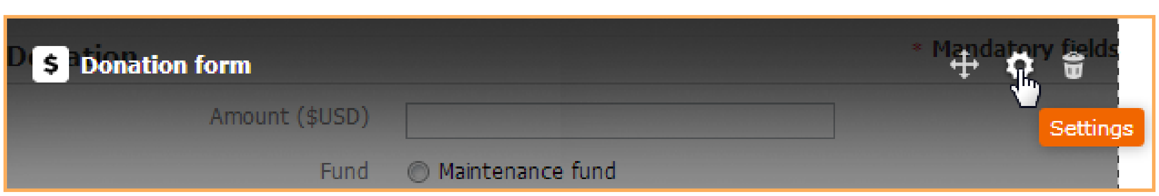
Adding a donation form

To add a donation form to a page on your Wild Apricot site, follow these steps:

Read more/less

1. Go to **Sites pages** (under the **Website** menu) and create or begin editing the site page where you want the donation form to appear.
2. Click the **Gadgets** icon to display the list of available gadgets.
3. Drag the Donation form gadget from the list, and drop it where you want it to appear on the page. You can insert it into a section within a layout, or above or below a layout.

   When a layout cell or placeholder is empty, a **Drop gadget or layout here** prompt will be displayed. When you drag a gadget over an empty layout cell or placeholder, it turns green, indicating that you can drop the gadget there. When you drag a gadget above or below a layout, a prompt will appear indicating that you can drop the gadget before or after the layout.
4. After you have dropped the gadget in the desired location, hover your pointer over it and click the **Settings** icon.



5. From the gadget settings panel on the left, choose the desired settings for your donation form. For more information, see Adjusting donation form settings (below).

6. Click **Save** to save the changes to the page.

For instructions on restricting access to the page, see Page access and visibility.

Adjusting donation form settings

Now that you have added a donation form gadget to your page, you can adjust the donation form gadget settings.

Read more/less

Gadget settings appear in a panel on the left side (which can be hidden to maximize the page design area). To display the settings panel, you position your pointer over the gadget – while editing a site page or a page template – then click the gadget's **Settings** icon.

The following settings are available for donation form gadgets:

Setting	Description
Common fields to include	Select the common fields to be included on the donation form. The Email field is automatically included and cannot be excluded.
Donation fields to include	Select the donation fields to be included on the donation form. T he Amount field is automatically included and cannot be excluded.
Margins	The amount of space – in pixels – that appears outside the gadget. You can set top, bottom, left, and right margins separately.
HTML ID	A unique identifier by which the gadget can be referenced within custom CSS or JavaScript code. The identifier is automatically generated but can be replaced with a more readable or memorable one (e.g. MyDonationFormGadget).
CSS class	The name of a CSS class defined on the CSS customization scre en.
Inline style	CSS code to control the behavior or appearance of the gadget. For example, you could enter *width: 250px;* to control the gadget width (replacing *250* with whatever value you choose).

Adding a description

You can add a description to your donation form by inserting a content gadget ahead of the donation form gadget.

Read more/less

Within the content gadget, you can add a title and description, and format them using text styles. For more information on adding and formatting text, see Using the content editor .

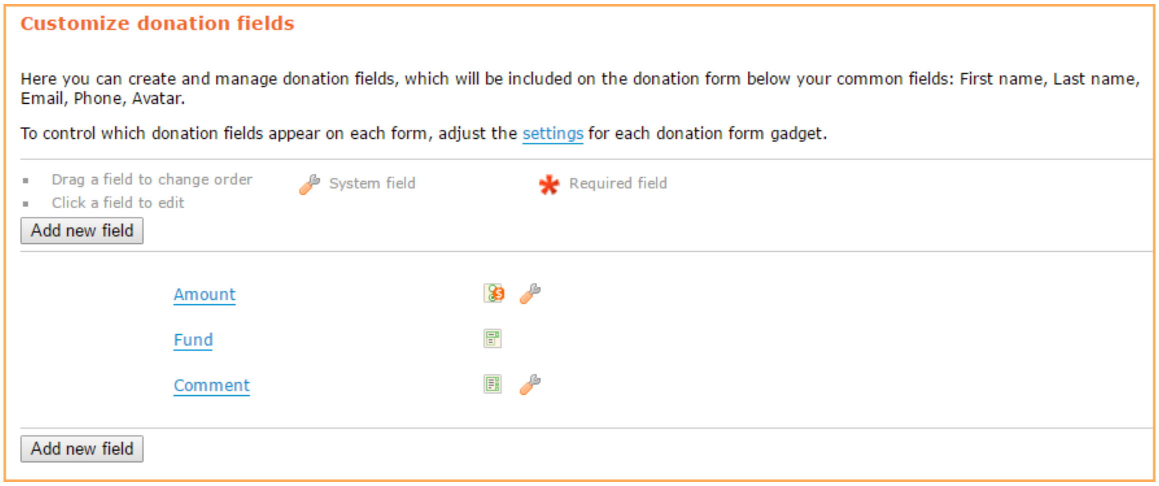
Customizing form fields

The donation form displays the donation fields you have selected from the donation form gadget settings. If the visitor viewing the donation form is not currently logged in, common fields will appear on the form as well. Included in your donation fields is the **Amount** field, a system field that cannot be renamed or deleted.

To add or modify donation fields, click **Donation fields** under the **Donations** menu.

Read more/less

The following screen appears.



From here, you can modify existing donation fields and add new ones.

Modifying existing fields

To modify an existing field, click it within the list. You can change the settings for any donor fields, including systems fields. For each field, you can change the following settings:

Setting	Description
Field label	The name used to identify the field. The field label must be unique among all donor fields and common fields.
Required field	Controls whether the field has to be filled out before the form can be submitted.
Field instructions	Instructions explaining how to use this field. For information on controlling the appearance of field instructions, see Adding field instructions.

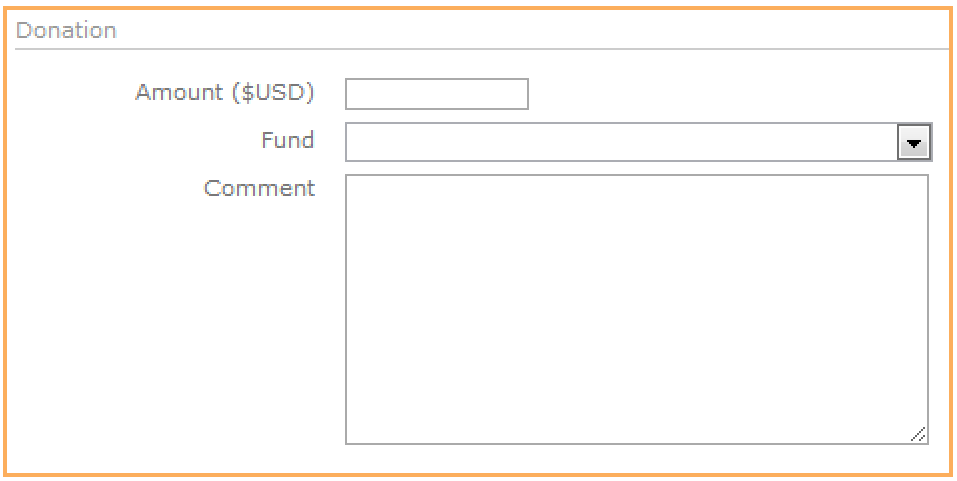
Amount field options

The **Amount** field is a system field and cannot be deleted or renamed. The **Amount** field settings allow you to control how the donor indicates the donation amount. The following options are available:

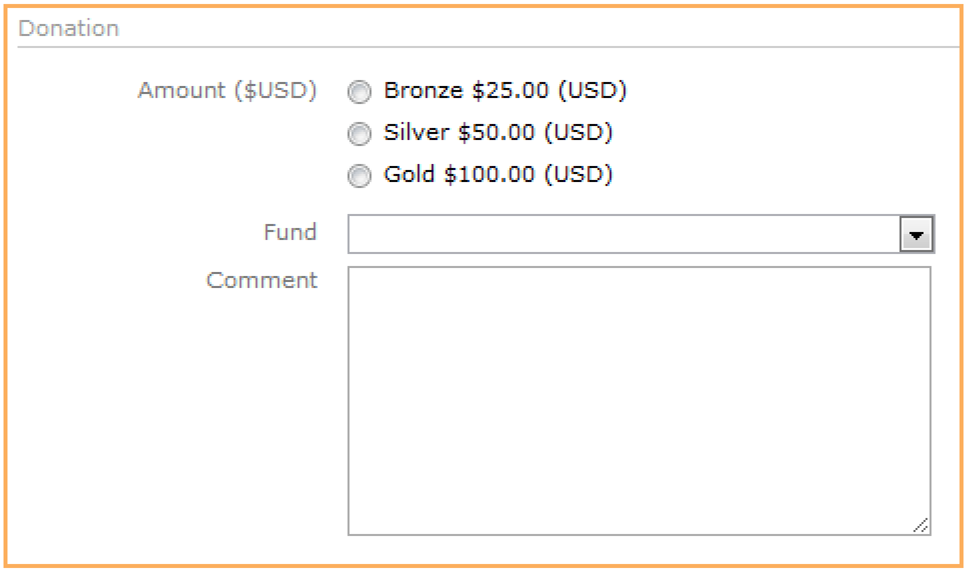
Option	Description	Next step
Custom	The donor can enter any amount.	Enter instructions to the donor in the **Entr y label** field.
Predefined	You provide the donor with a list of labeled amounts to choose from.	For each option, enter a label (e.g. Bronze) and amount. Click the green plus sign to add more donation options and the red minus sign to remove them.

You can choose between these options or use both.

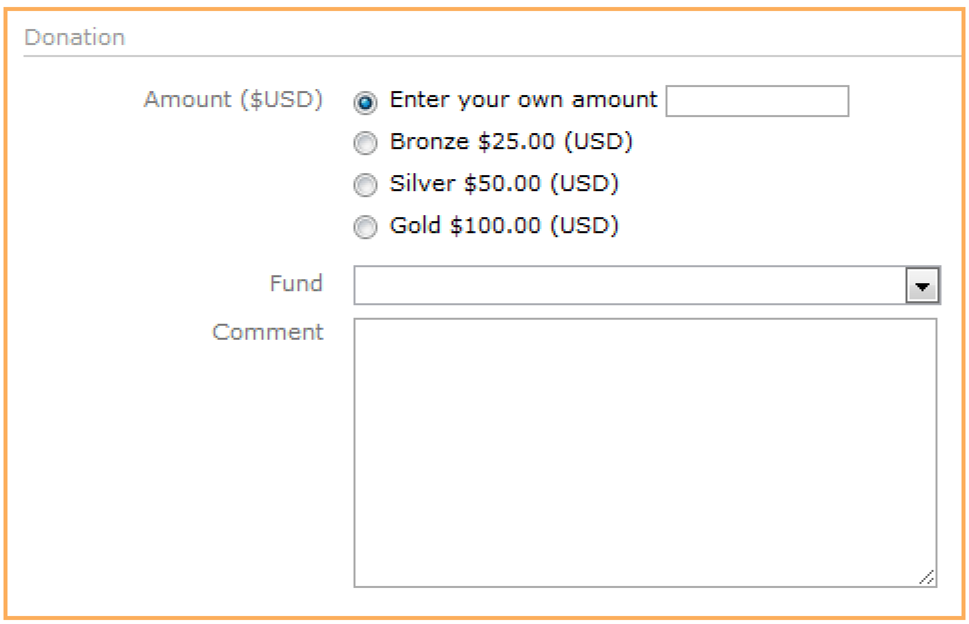
Depending on which options you choose, your form can look like one of the following:



Custom donation only



Choose from predefined donation options



Custom and predefined options

Adding new fields

To add a new field, click **Add new field**. For new fields, you can set the field type and change field settings.

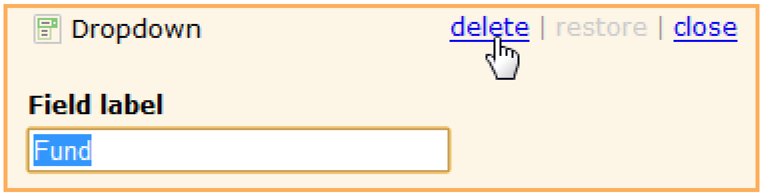
The following field types are available:

Type	Description
Text	Simple text field, used for short entries.
Multiline text	Used for longer text entries of up to 3,000 characters.
Multiple choice	A set of checkboxes. See Working with list fields.
Radio buttons	A set of mutually exclusive choices, arranged like buttons on a car radio. See Working with list fields.

Dropdown	A set of mutually exclusive choices, arranged in a drop-down list. See Working with list fields.
Rules and terms	A checkbox with a link to documentation of waivers, terms of use, contractual conditions, etc. For more information, see Field for contractual terms.
Date	Displays a calendar control that can be used to select a date.
Section divider	Used to group and separate fields.

Deleting fields

To delete a field, click it within the list, then click the **delete** link on the right.



You cannot delete system fields.

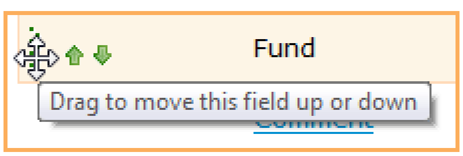
After you delete a field, it appears crossed out in the field list until you save your changes.

While the field appears crossed out, you can restore it by clicking the restore link.

Deleting a field will automatically lose all data stored in that field for all donations.

Reordering fields

To change the order in which fields appear, you can drag and drop fields within the list, or you can click the green up and down arrows beside a field.



Changing colors and fonts

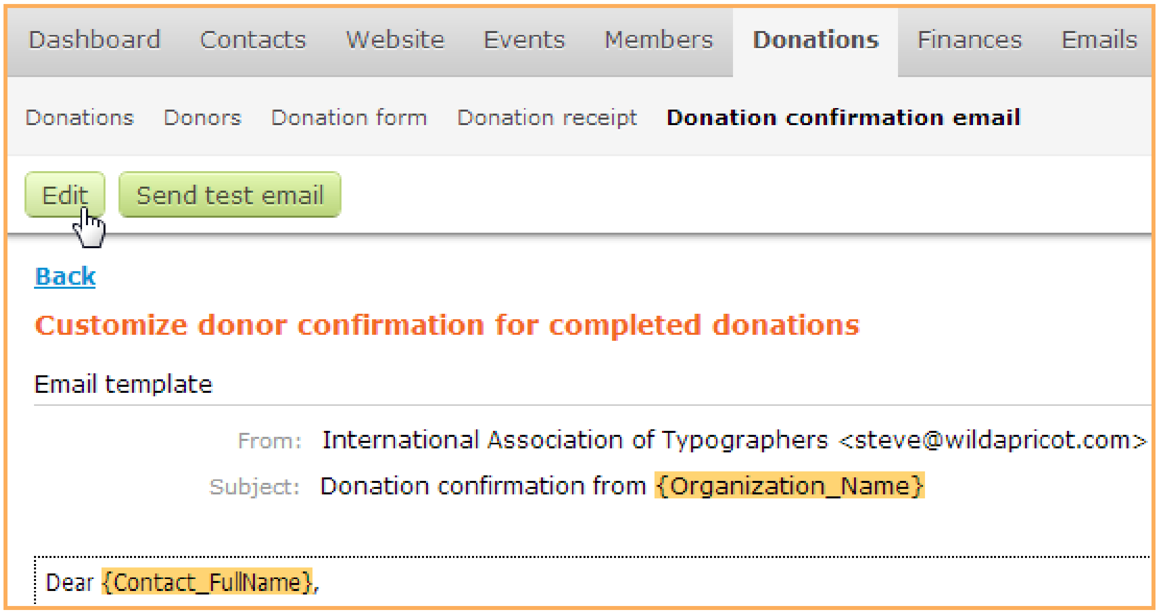
You can change the colors, text styles, and backgrounds used in your website from the Colors and styles screen. For a list of the donation form elements you can customize, click here.

Customizing the donation confirmation email

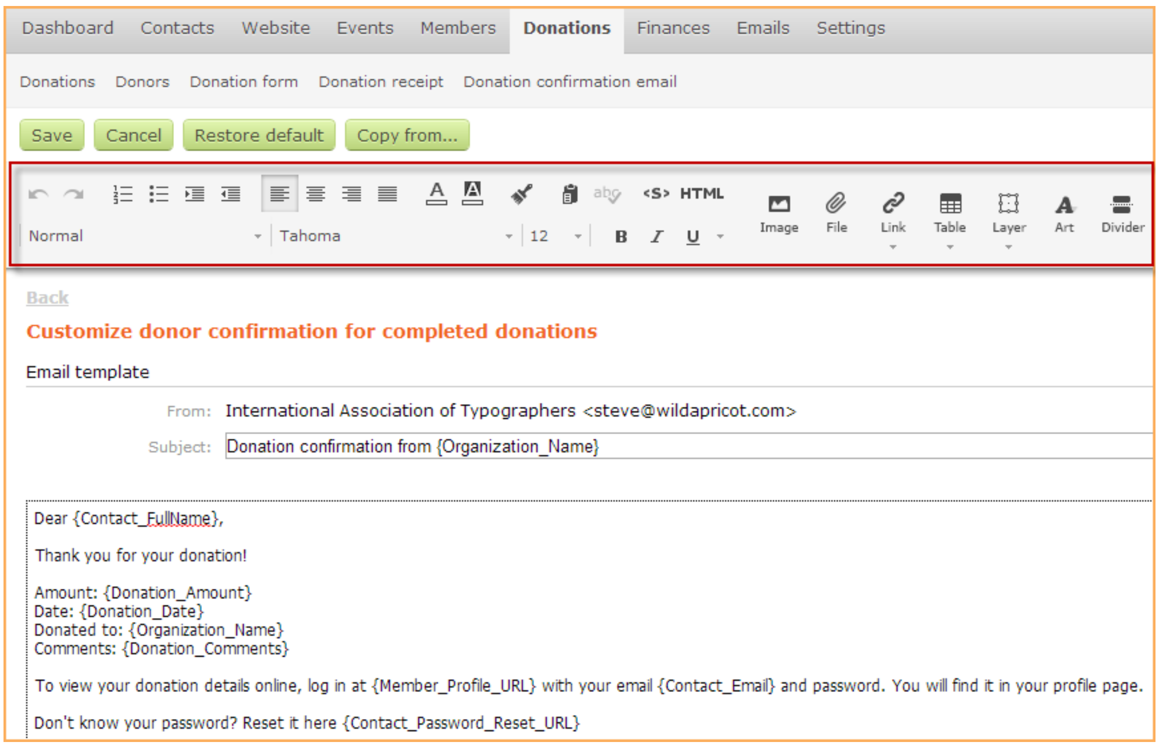
When a visitor to your site makes a donation – submits the form and makes the payment – a confirmation email is sent to the donor, followed by a donation receipt. To customize the donation confirmation email, click **Donation confirmation email** under the **Donations** menu.

Read more/less

On the screen that appears, click **Edit** to enter edit mode.



Within the body of the email, you can add or replace text, links, pictures, and macros using the options appearing on the toolbar.

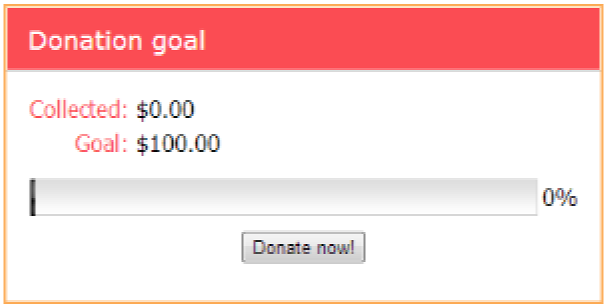


To choose a previous email or an email template as the basis for the email, click the **Copy from** button. To restore the original pre-modified version of the email – the factory default – click the **Restore default** button.

When you are ready to save your changes, click the **Save** button. After you have saved the confirmation email, you can test it by clicking the **Send test email** button. A sample of the email will be sent to you containing sample data – not actual data from your database – to give you an idea of what the email will look like.

Adding a donation goal gadget

To track your fundraising efforts, you can add a donation goal gadget to a page on your site. The donation goal gadget displays a progress bar that measures progress towards your financial goal.



On this page:

- Using the donation form
- Adding a donation form
- Adjusting donation form settings
- Adding a description
- Customizing form fields
- Changing colors and fonts
- Customizing the donation confirmation email
- Adding a donation goal gadget

Expand all sections

See also:

- Managing donations
- Personalized fundraiser page
- Online payments
- Financial management overview
- Adding Wild Apricot functionality to other websites
- Donation widget
- Changing button labels

Photo albums

Photo albums

You can add a photo album to a page on your Wild Apricot, so that visitors to your site can view a gallery of photos. Public photo albums are different from member photo albums which appear on members' individual profiles.

You can allow members to upload photos to photo albums on your site, choosing whether to restrict uploading to selected membership levels, or allow just site administrators to upload photos.

You can add as many photo albums as you want, with each album appearing on a separate page. You can restrict access to each page as you would any other page.

Photo albums – like other site content – are inserted as gadgets, in this case, a photo album gadget. You cannot add a photo album gadget – or any other singular gadget – to a page template or system page, or to a page containing another singular gadget.

Each album appears as a separate folder under SiteAlbums within your site's Resources folder. Deleting a photo album gadget does not remove the corresponding album folder from the SiteAlbums folder.

You can also display the images from a photo album in a slideshow gadget.

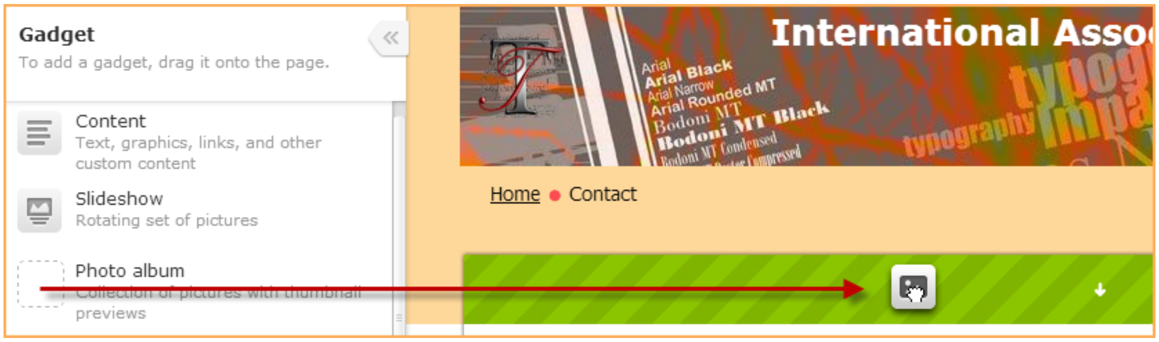
Adding a photo album to a page

To add a photo album to a page on your site, follow these steps:

Read more/less

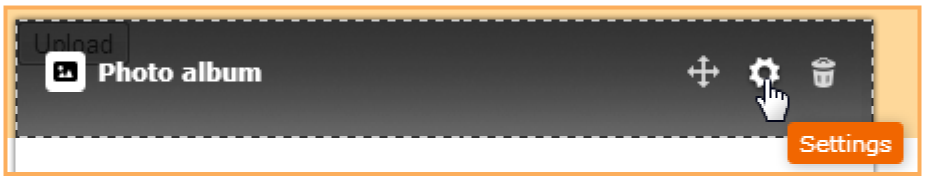
1. Go to **Sites pages** (under the **Website** menu) and create or begin editing the site page where you want the album to appear.
2. Click the **Gadgets** icon to display the list of available gadgets.
3. Drag the Photo album gadget from the list, and drop it where you want it to appear on the page. You can insert it into a section

within a layout, or above or below a layout.



When a layout cell or placeholder is empty, a **Drop gadget or layout here** prompt will be displayed. When you drag a gadget over an empty layout cell or placeholder, it turns green, indicating that you can drop the gadget there. When you drag a gadget above or below a layout, a prompt will appear indicating that you can drop the gadget before or after the layout.

4. After you have dropped the gadget in the desired location, hover your pointer over it and click the **Settings** icon.



5. From the gadget settings panel on the left, choose the desired settings for your photo album. For more information, see Adjusting photo album settings (below).
6. Click **Save** to save the changes to the page.

For instructions on restricting access to the page, see Page access and visibility.

Adjusting photo album settings

After you've added a photo album gadget to a page on your site, you can adjust the photo album gadget settings. Within the gadget settings, you can set the number of photos per page and control who can add photos to the photo album.

Read more/less

Gadget settings appear in a panel on the left side (which can be hidden to maximize the page design area). To display the settings panel, you position your pointer over the gadget – while editing a site page – then click the gadget's **Settings** icon.

The following photo album gadget settings are available.

Setting	Description
Album name	The name of the photo album. This is the name that would appear when you are selecting a photo album to use as the basis for a slideshow gadget.
Photos per page	The maximum number of photos that appear on each photo album page. If there are more than the specified number of photos in the album, links will appear at the top-right and bottom-right of the page that you can use to scroll through the album pages.
Photos can be uploaded by	Choose the kind of members who can upload photos to the photo album. You can allow all members, administrators only, or selected membership levels. If you choose the **Selected membership levels** option, you then check the membership level(s) that you want to be able to upload photos.

Sort by	Controls the order in which photos are displayed in the album. You can choose to display them by name or date added – the date the photo was uploaded to the album – in ascending or descending order.
Album information	This section displays identifying information for the album that administrators need to upload photos via the Files screen or via WebDAV. Before you can view the album information, you have to save the page on which the photo album gadget appears then refresh your browser (on most browsers: press the F5 key). For more information, see Uploading photos through File management or via WebDAV.
Gadget title	If you specify a gadget title, the title will appear specially formatted within the gadget. Depending on the gadget style you choose, the title may appear in a heading box.
Gadget style	The gadget style determines the physical appearance of the gadget. The style you choose will determine the color and format of the gadget title, the gadget content, and the gadget border. You can choose from theme-specific styles and styles that are common to all themes.
Margins	The amount of space – in pixels – that appears outside the gadget. You can set top, bottom, left, and right margins separately.
HTML ID	A unique identifier by which the gadget can be referenced within custom CSS or JavaScript code. The identifier is automatically generated but can be replaced with a more readable or memorable one (e.g. MyPhotoAlbumGadget).
CSS class	The name of a CSS class defined on the CSS customization scre en.
Inline style	CSS code to control the behavior or appearance of the gadget. For example, you could enter *width: 250px;* to control the gadget width.

Adding a description

You can add a description for your photo album by inserting a content gadget ahead of the photo album gadget. Within the content gadget, you can add a title and description, and format them using text styles. If you plan to add a title and description using a content gadget, be sure not to enter a gadget title as part of the photo album gadget settings. For more information on adding and formatting text, see Using the content editor.

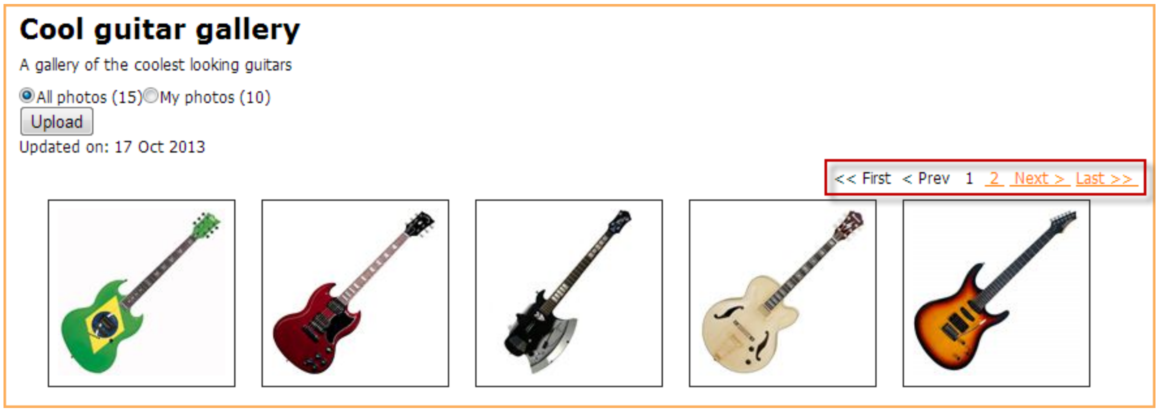
Viewing photo albums

Each photo album shows thumbnails of photos. The number of photos displayed per page depends on the **Photos per page** setting within the photo album gadget's settings.

Read more/less

If you are logged in as a member, you have the option to show all photos or only photos that you have uploaded. If you have permission to upload photos, an **Upload** button will appear.

If the number of photos in the album exceeds the **Photos per page** setting, then links will appear at the top-right and bottom-right of the gadget that you can use to scroll through the album pages.



To view a larger version of a photo, click the thumbnail within the photo album. On the individual photo page, the photo will be displayed as close to full size as can fit on the page. Above the image you will see the date the image was uploaded, as well as the name of the member who uploaded it (depending on the member's privacy settings).

To view the full version of the photo in a separate browser tab, click the photo within the photo page. To scroll through other images in the album, click the **Previous** or **Next** links.

Changing colors and fonts

You can change the colors, text styles, and backgrounds used in your website from the Colors and styles screen. For a list of photo album elements you can customize, click here. For more advanced fine-tuning, you can use CSS customization and theme overrides.

Uploading photos

There are 3 ways that photos can be uploaded to a photo album:

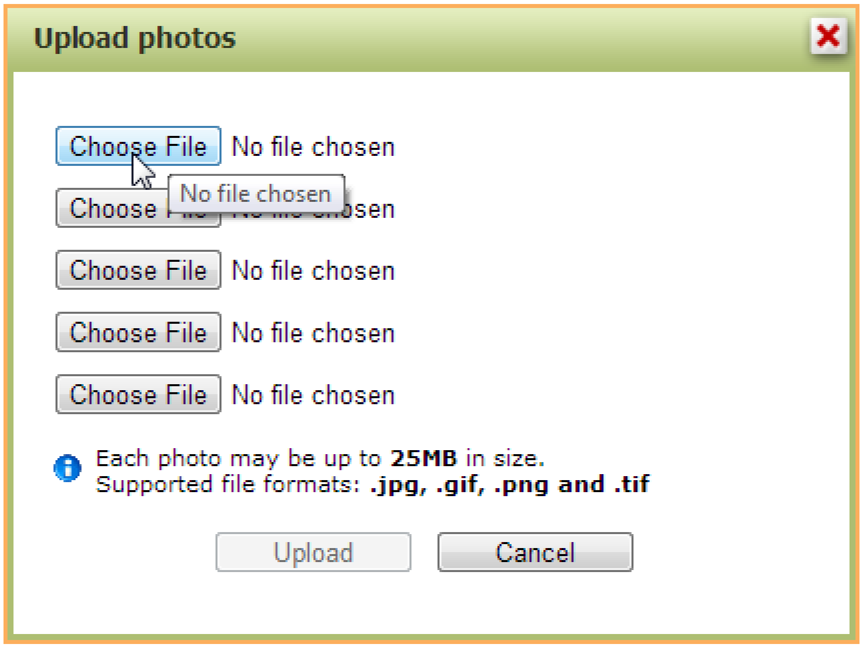
- from the photo album
- through File management
- via WebDAV

Uploading photos from the photo album

Administrators and members who have been granted permission to upload photos will see a **Upload** button within the photo album.

Read more/less

Clicking this button will display a dialog where they can select up to 5 images to be uploaded at a time.



You can select photos saved using the following file formats: .jpg, .gif, .png and .tif. The maximum file size of each photo will depend on your billing plan.

After selecting the files to be uploaded, click the **Upload** button.

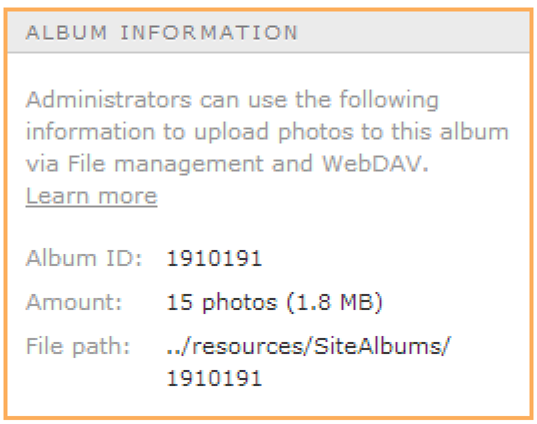
The selected photos will be uploaded and added to the photo album.

Uploading photos through the Files screen or via WebDAV

Administrators can also upload photos using the Files screen and through WebDAV.

Read more/less

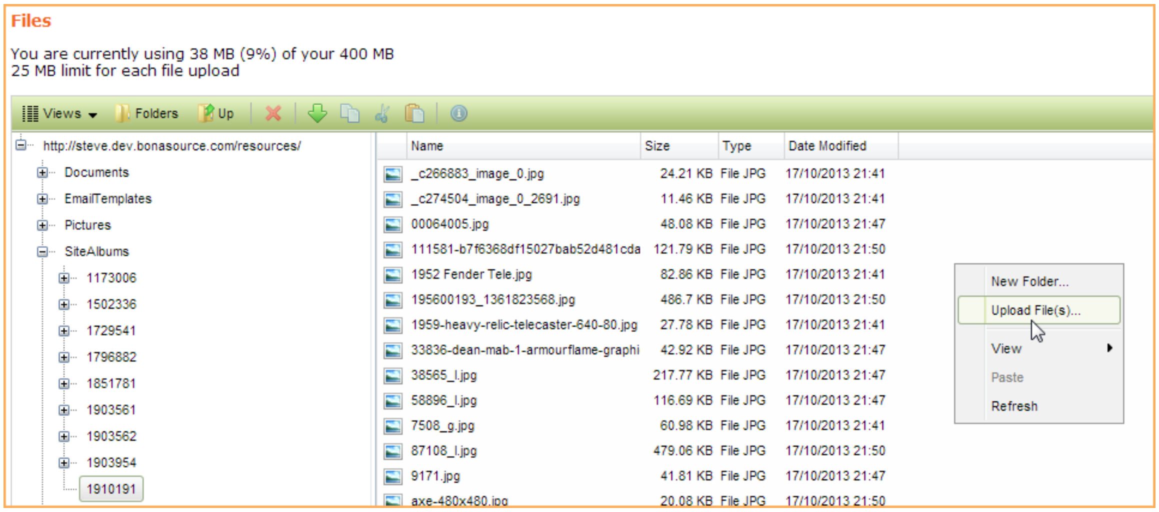
To upload images through the Files screen or WebDAV, take note of the **Album ID** displayed on the photo album gadget settings.



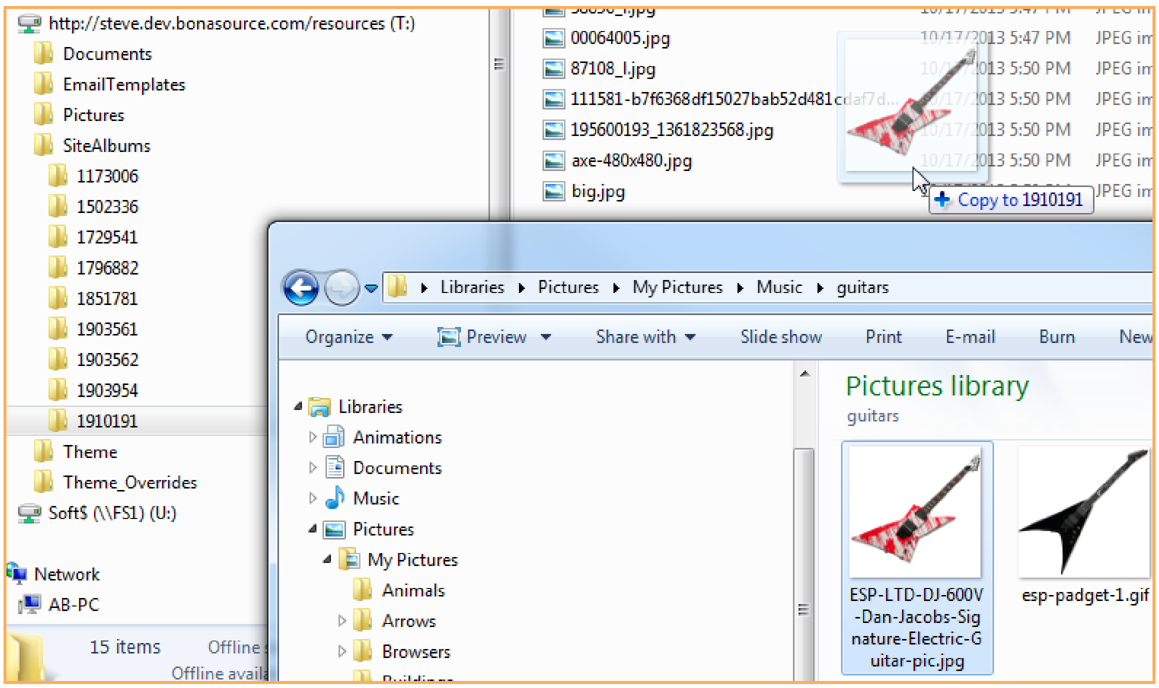
Before you can view the album information, you have to save the page on which the photo album gadget appears then refresh your browser (on most browsers: press the F5 key).

To upload photos to the album through the Files screen or via WebDAV, you expand the **SiteAlbums** folder under **Resources** then select the folder with the album ID number.

From the Files screen, you can upload any number of files to the album folder.



Via WebDAV, you can copy files to the album folder as you would any other folder on your computer.



Do not add files directly to the SiteAlbums folder. Only add files to one of the subfolders under SiteAlbums.

Downloading photos

Photos added to photo albums on your site can be downloaded from the Files screen or using WebDAV. In either case, you expand the **Site Albums** folder under **Resources** then select the folder with the album ID number. You can then copy the files to another location on your computer or network.

Adding captions to photos

After a member or administrator uploads a photo, they can add a caption to the image they uploaded. You can add captions only to those photos that you have uploaded.

Read more/less

To add a caption, click on the image within the album and then click the **Add caption** link that appears below the photo on the individual photo page.

After you enter a caption and click on **Save**, the caption will appear below the photo thumbnail and on the individual photo page.

⚠ There is a limit of 200 characters for photo captions.

Deleting photos

After a member or administrator uploads a photo, they can delete the image they uploaded.

Read more/less

To delete a photo, hover over its thumbnail within the photo album then click the **Delete** link that appears.

You can also delete a photo from the individual photo page by clicking the **Delete photo** button that appears in the upper right corner.

Administrators can delete photos from the Files screen and WebDAV. Through the Files screen and WebDAV, administrators can delete any photos whether they uploaded them or not.

On this page:

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Adding animated slideshows

Adding animated slideshows

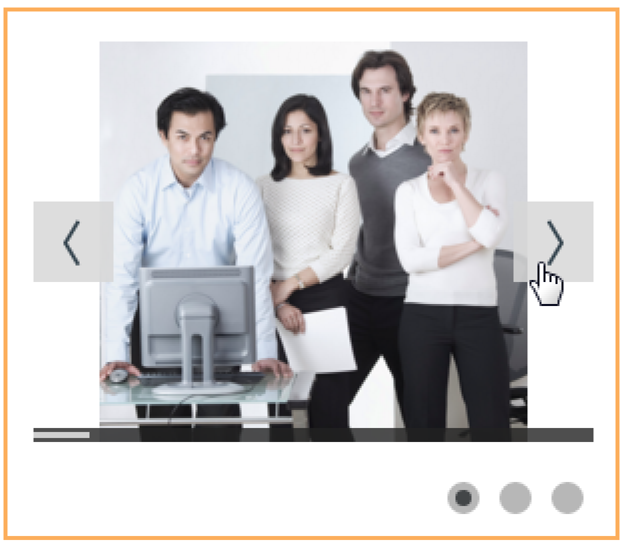
You can add an animated slideshow to your Wild Apricot site, displaying one image after another from a collection of images.

You can add a slideshow to a page or a page template so that all pages that use that template will automatically display the slideshow. You could, for example, add a slideshow to your page header to act as an animated header background.

You can add a slideshow by inserting Wild Apricot's slideshow gadget into a page or page template, or you can use a 3rd-party jQuery plugin such as Nivo Slider.

Using Wild Apricot's slideshow gadget

Wild Apricot's slideshow gadget can display images from a folder in your Wild Apricot account or a photo album gadget on a page in your site. Depending on your settings, visitors can view the images in order at the speed you have set, or they can scroll through the images at their own speed, and use the controls at the bottom of the slideshow to jump to a particular image.

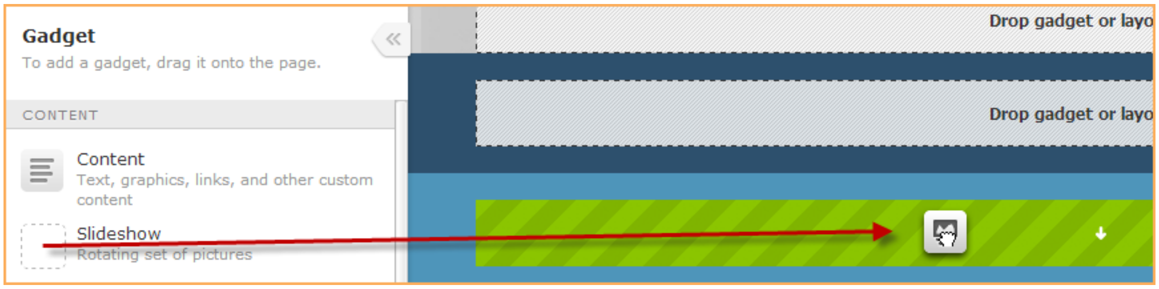


You can separately link each image to a page on your site, an event on your site, or an external page or email address. You can also specify descriptions to appear along the bottom of each image.

Adding a slideshow gadget

To add a slideshow gadget to a page or page template, follow these steps:
Read more/less

1. Go to **Sites pages** (under the **Website** menu) and create or begin editing the site page or page template where you want the slideshow to appear.
2. Click the **Gadgets** icon to display the list of available gadgets.
3. Drag the slideshow gadget from the list, and drop it where you want it to appear. You can insert it into a section within a layout, or above or below a layout.



When a layout cell or placeholder is empty, a **Drop gadget or layout here** prompt will be displayed. When you drag a gadget over an empty layout cell or placeholder, it turns green, indicating that you can drop the gadget there. When you drag a gadget above or below a layout, a prompt will appear indicating that you can drop the gadget before or after the layout.

4. After you have dropped the gadget in the desired location, hover your pointer over it and click the **Settings** icon.

5. Within the gadget settings panel on the left, choose which images you want to display. You can display images from the current theme, from a particular folder in your Wild Apricot account, or from a photo album gadget on your site.
6. Adjust other slideshow gadget settings as required. For more information, see Adjusting slideshow gadget settings (below).
7. Click **Save** to save the changes to the page.

For instructions on restricting access to the page, see Page access and visibility.

Adjusting slideshow gadget settings

Now that you have added a slideshow gadget to your page or page template, you can adjust the slideshow gadget settings to control how slideshow images are displayed.

Read more/less

Gadget settings appear in a panel on the left side (which can be hidden to maximize the page design area). To display the settings panel, you position your pointer over the gadget – while editing a site page or a page template – then click the gadget's **Settings** icon.

The following settings are available for slideshow gadgets:

Setting	Description

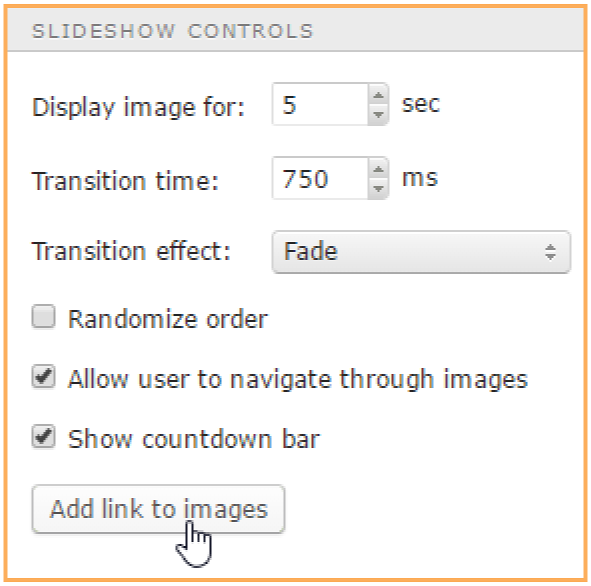
Images to display	Choose the location of the images you want to display. You can display images from the current theme, from a particular folder in your Wild Apricot account, or from a photo album gadget on your site. You cannot choose photo albums that appear on admin only pages. If you display images from a folder, the images will appear in order by file name. If you display images from a photo album gadget, they will appear in the order in which they were added to the photo album – from newest to oldest – unless you enable the **Randomize order** option (below). Any captions added to images in the photo album will automatically displayed along the bottom of the images.
Gallery layout	Controls the size and orientation of the slideshow. You can choose from **Landscape**, **Portrait**, **Square**, and **Fixed height** options. If you select **Fixed height**, you can specify the height of the slideshow in pixels.
Fit image to slideshow area	Controls whether images are expanded to fill the slideshow area. If this option is enabled, part of the image may be cropped. If this option is disabled, white bars may appear above or beside the image.
Display image	The number of seconds each image should be displayed.
Transition time	The number of milliseconds for the transition between images.
Transition effect	The effect used during the transition time to move from one image to another.
Randomize order	Check this option to display the slideshow images in random order.
Allow user to navigate through images	Determines whether controls appear along the side of the slideshow, allowing visitors to scroll through images at their own speed, and at the bottom, allowing visitors to jump to different images instead of viewing the images in order. 

Show countdown bar	Check this option to display a countdown bar showing how much longer the current image will be displayed. 
Add link to images	Click this button to link your slideshow images. On the dialog that appears, you can choose where each image should link to. You can link to an external website or email address, to a page on your site, or to an event on your site. For each image, you can also specify a tooltip and choose whether you want the linked page to open in a new window or the same window. You can also specify a description which will appear along the bottom of the image. If you are displaying images from a photo album, any captions already assigned to the image will be automatically loaded as default descriptions.
Margins	The amount of space – in pixels – that appears outside the gadget. You can set top, bottom, left, and right margins separately.
HTML ID	A unique identifier by which the gadget can be referenced within custom CSS or JavaScript code. The identifier is automatically generated but can be replaced with a more readable or memorable one (e.g. MySlideshowGadget).
CSS class	The name of a CSS class defined on the CSS customization scre en.
Inline style	CSS code to control the behavior or appearance of the gadget.

Linking images in your slideshow

You can link each image in your slideshow to a separate destination. To link your images, display the slideshow gadget settings and click the **Add link to images** button.

Read more/less



On the dialog that appears, you select each image that you want to link, then choose where you want the link to go to. The following options are available:

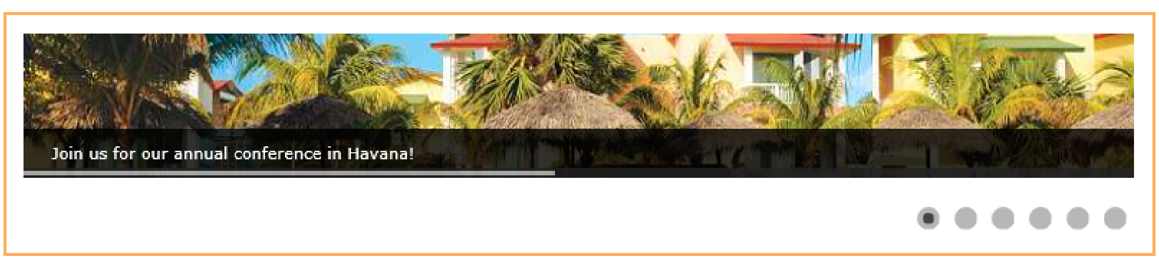
Option	Description	Next step
Event	Link to the detail page or registration form for one or your events.	Select the event from the list of past and upcoming events. Choose whether to link to the event's detail page or registration page.
Site page	Link to another page on your Wild Apricot site.	Select the page from the list.
Website/Email	Link to an email address or another website.	Enter the email address or website URL.

For each image, you can also specify a tooltip and choose whether you want the linked page to open in a new window or the same window.

You can also specify a description which will appear along the bottom of the image. If you are displaying images from a photo album, any captions already assigned to the images will be automatically loaded as default descriptions.

Displaying captions

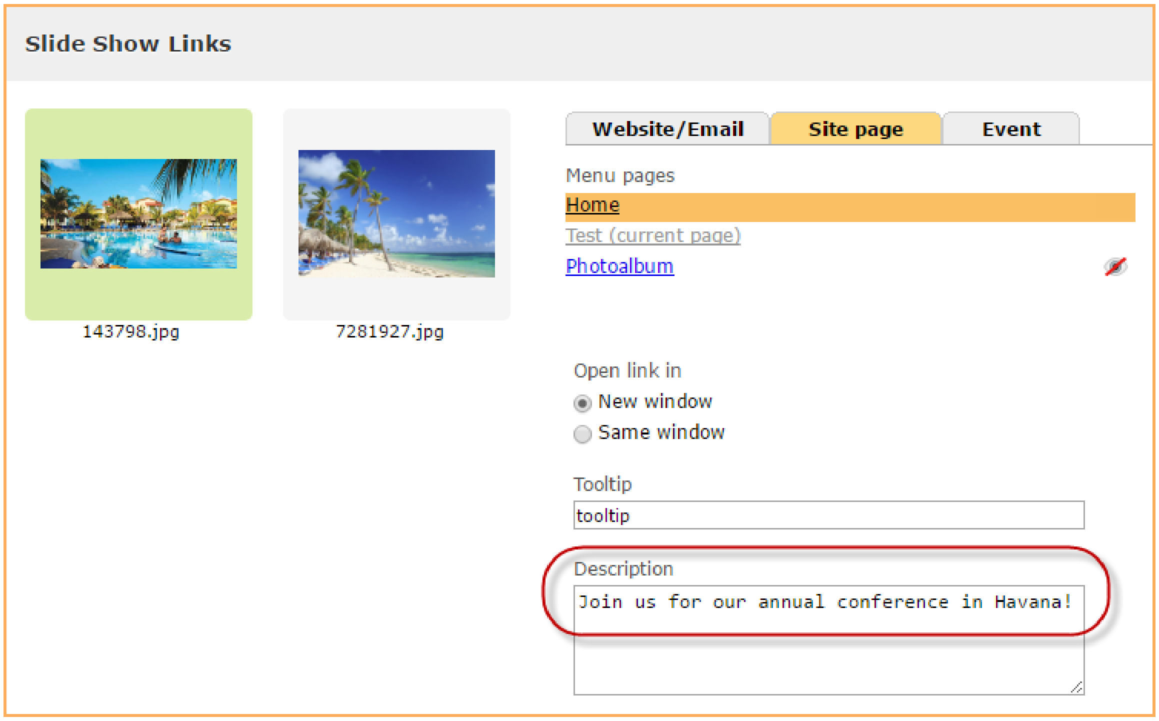
You can display a caption along the bottom of each image within your slideshow.



Read more/less

There are two ways you can add description to images:

- If you are displaying images from a photo album, captions will be automatically displayed along the bottom of the images.
- While linking your slideshow images, you can enter a **Description** for each image.



If you are displaying images from a photo album, captions will be automatically loaded as default descriptions.

> ⚠ You cannot assign or modify a caption from the slideshow gadget settings without linking the image.

Using Nivo Slider

> ⚠ Wild Apricot does not provide support for 3rd-party software.

To add an animated slideshow to your site using the Nivo Slider jQuery plugin, follow these steps:

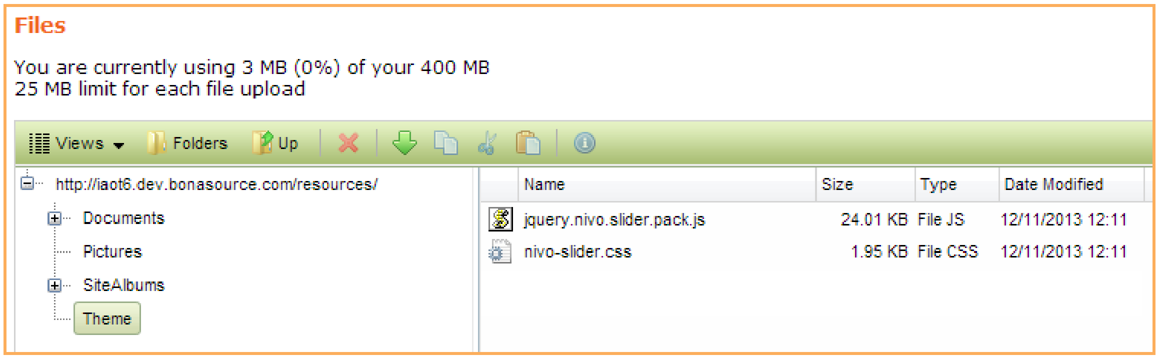
1. Download and upload the plugin files

Read more/less

> ⚠ The jQuery library is already installed on Wild Apricot pages, so don't add it manually to your site.

1. Download nivo_slider.zip.
2. Extract the contents of the download file to a location of your choice.
3. Upload the following files into the **Theme** folder under **Resources**, from the Files screen or via WebDAV.

    - jquery.nivo.slider.pack.js
    - nivo-slider.css



4. Create a new folder under your **Pictures** folder and call it **slider-images**.
5. Upload the images you want to use for your slideshow into this folder.

> If you plan to add the slideshow to your page header, the images should ideally match the height and width of your page header. For best results, all the images in a slideshow should have the same dimensions.

6. Click **Settings** then click **Meta-tags** under **Site settings**.
7. In the **Raw headers** field, copy and paste the following code:

```
<link rel="stylesheet" href="/resources/theme/nivo-slider.css"
type="text/css" media="screen" />
<script src="/resources/theme/jquery.nivo.slider.pack.js"
type="text/javascript"></script>
```

8. If you have defined meta-tags for individual pages on your site, you need to add this code to those meta-tags as well. If not, you can click the **Reset all pages to use this** button to overwrite the meta-tags for all your Wild Apricot pages with this code.

2. Add the slideshow to your site

Now, you can add the slideshow to a page or page template. You can add the slideshow to a content gadget or as a separate custom HTML gadget.

Adding the slideshow to a content gadget

To add the slideshow to a content gadget, follow these steps:

Read more/less

1. Begin editing the site page or page template where you want the slideshow to appear.
2. Click within the content gadget to begin modifying it. If you haven't create the content gadget yet, click the **Gadgets** icon to display the list of available gadgets then drag and drop a content gadget where you want it.
3. Within the content gadget, click where you want the slideshow to appear.
4. Click the **S (Snippet)** button within the toolbar towards the top of the screen.

5. Within the code box, paste the following code:

```
<div class="slider-wrapper">
    <div id="slider" class="nivoSlider">
        <img src="/resources/pictures/slider-images/image1.jpg" alt="" />
        <img src="/resources/pictures/slider-images/image2.jpg" alt=""  />
        <img src="/resources/pictures/slider-images/image3.jpg" alt="" />
    </div>
</div>
<script type="text/javascript">
$(window).load(function() {
    $('#slider').nivoSlider();
});
</script>
```

replacing image1.jpg to image3.jpg with the names of the images you want to display in your slideshow. (If they reside in a folder other than Pictures/slider-images, then adjust the folder name accordingly.) To include more images in the slideshow, add more <img> tags.

6. Click **Save** to save your code.
7. Click **Save** to save changes to the page.

The slideshow should now appear on your site page. Switch to public view if the box does not immediately appear.

Adding the slideshow as a custom HTML gadget

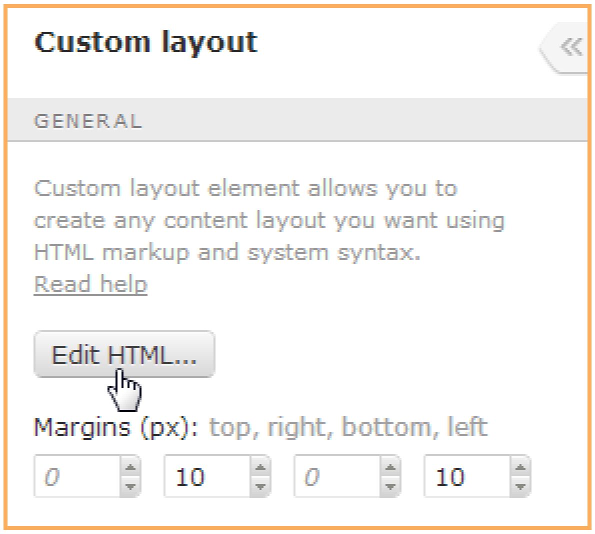
To add the slideshow as a separate custom HTML gadget, follow these steps:

Read more/less

1. In your Wild Apricot site, go to **Sites pages** (under the **Website** menu) and begin editing the site page or page template where you want the slideshow to appear.
2. Click the **Gadgets** icon to display the list of available gadgets.
3. Drag the custom HTML gadget from the Gadget list, and drop it on the desired location.

When a layout cell or placeholder is empty, a **Drop gadget or layout here** prompt will be displayed. When you drag a gadget over an empty layout cell or placeholder, it turns green, indicating that you can drop the gadget there. When you drag a gadget above or below a layout, a prompt will appear indicating that you can drop the gadget before or after the layout.

4. After you have inserted the gadget, click the **Edit code** button within the page settings on the left.



5. In the dialog that appears, copy and paste the following code:

```
<div class="slider-wrapper">
    <div id="slider" class="nivoSlider">
        <img src="/resources/pictures/slider-images/image1.jpg" alt="" />
        <img src="/resources/pictures/slider-images/image2.jpg" alt=""  />
        <img src="/resources/pictures/slider-images/image3.jpg" alt="" />
    </div>
</div>
<script type="text/javascript">
$(window).load(function() {
    $('#slider').nivoSlider();
});
</script>
```

   replacing image1.jpg to image3.jpg with the names of the images you want to display in your slideshow. (If they reside in a folder other than Pictures/slider-images, then adjust the folder name accordingly.) To include more images in the slideshow, add more <img> tags.
6. Click the **Save** button to save your code.
7. Click the **Save** button to save your changes to the page.

The slideshow should now appear on your site page. Switch to public view if the box does not immediately appear.

Making the images hyperlinks

You can link the images in your slideshow to another page or site.

Read more/less

If you want the images in your slideshow to be clickable hyperlinks, then change the <img> tags from:

```
<img src="/resources/pictures/slider-images/image1.jpg" alt="" />
```

to:

```
<a href="http://yourlink.com"><img
src="/resources/pictures/slider-images/image1.jpg" alt="" /></a>
```

where *http://yourlink.com* is the destination URL for the hyperlink.

If your hyperlinks do not work on Internet Explorer, add the following code to the CSS customization screen:

```
.nivoSlider a.nivo-imageLink { background:white; filter: alpha(opacity=0);
opacity: 0;}
```

Controlling the width and height of the slideshow

To control the width and height of the slideshow, you add custom CSS code to alter its default behavior.

Read more/less

To add custom CSS code, click the **Settings** tab and click **CSS customization** under **Site look and feel**.

In the code window that appears, enter the following code:

```
.nivoSlider {
    width:90px !important;
    height:90px !important;
}
```

In this code, we are setting the width and height of the slideshow to 90 pixels. You can set your slideshow to whatever width and height you choose, though the slider may ignore one of the two values to avoid stretching or distorting the image.

Instead of specifying the number of pixels for the width or height, you can specify a percentage, as shown in the following code:

```
.nivoSlider {
    width:50% !important;
    height:50% !important;
}
```

You can also set one of the values to *auto* so that it is automatically calculated based on the other value and the proportions of the image. For example:

```
.nivoSlider {
    width:50% !important;
    height:auto !important;
}
```

Other plugin options

The Nivo Slider has several options you can change.

Read more/less

To change a plugin option, add an option statement within <script> tag in the code shown above using the following format:

```
<script type="text/javascript">
$(window).load(function() {
    $('#slider').nivoSlider({
        option: value,
        option: value,
        option: value
    });
});
</script>
```

where *option* is the option name and *value* is the value of the option. For example, to reset the transition effect to fade, the code would appear as:

```
<script type="text/javascript">
$(window).load(function() {
    $('#slider').nivoSlider({
        effect: 'fade'
    });
});
</script>
```

The sample code below shows all the available options and their defaults values:

```
<script type="text/javascript">
$(window).load(function() {
    $('#slider').nivoSlider({
        effect: 'random', // Transition effect between images (see below)
        slices: 15, // For slice animations
        boxCols: 8, // For box animations
        boxRows: 4, // For box animations
        animSpeed: 500, // Slide transition speed
        pauseTime: 3000, // How long each slide will show
        startSlide: 0, // Set starting Slide (0 index)
        directionNav: true, // Next & Prev navigation
        controlNav: true, // 1,2,3... navigation
        controlNavThumbs: false, // Use thumbnails for Control Nav
        pauseOnHover: true, // Stop animation while hovering
        manualAdvance: false, // Force manual transitions
        prevText: 'Prev', // Prev directionNav text
        nextText: 'Next', // Next directionNav text
        randomStart: false, // Start on a random slide
        beforeChange: function(){}, // Triggers before a slide transition
        afterChange: function(){}, // Triggers after a slide transition
        slideshowEnd: function(){}, // Triggers after all slides have been shown
        lastSlide: function(){}, // Triggers when last slide is shown
        afterLoad: function(){} // Triggers when slider has loaded
    });
});
</script>
```

The *effect* option controls the transition between images and can be set to any of the following values:

- sliceDown
- sliceDownLeft

- sliceUp
- sliceUpLeft
- sliceUpDown
- sliceUpDownLeft
- fold
- fade
- random
- slideInRight
- slideInLeft
- boxRandom
- boxRain
- boxRainReverse
- boxRainGrow
- boxRainGrowReverse

Troubleshooting

Slideshow does not work in IE, works fine in other browsers

If you add options to your script then make sure there is no comma after the very last option i.e. the script should always follow this format:

```
<script type="text/javascript">
$(window).load(function() {
    $('#slider').nivoSlider({
        option1: value,
        option2: value,
        option3: value
    });
});
</script>
```

Slideshow appears on top of drop-down menu options

On some themes, the slideshow may appear on top of drop-down menu options. To resolve this problem, add the following code to the CSS customization screen:

```
.slider-wrapper{
  opacity: 0.99;
}
```

On this page:

Expand all sections

Email subscription form

Email subscription form

You can set up one or more email subscription forms to allow visitors to your site to sign up to receive newsletters, updates, or other manual email blasts.

Visitors who subscribe will added to your contact database.

> Signing up for email subscriptions is separate and distinct from the process of subscribing or unsubscribing to automatic emails.

You can search for subscribers by subscription type, and send an email blast to each group of subscribers. Subscribers do not automatically receive the content they signed up for – it is up to you to send mass emails to your subscribers.

Subscription forms – like other site content – are inserted as gadgets, in this case, a subscription form gadget. You cannot add a subscription form gadget – or any other singular gadget – to a page template or system page.

> You can embed a Wild Apricot subscription form on another website using widgets.

Using a subscription form

For logged in contacts, the contact fields on the subscription form are filled in automatically using information from their contact record.
Read more/less

If the subscriber is not already a contact in your database, they will be automatically added after submitting the completed form.

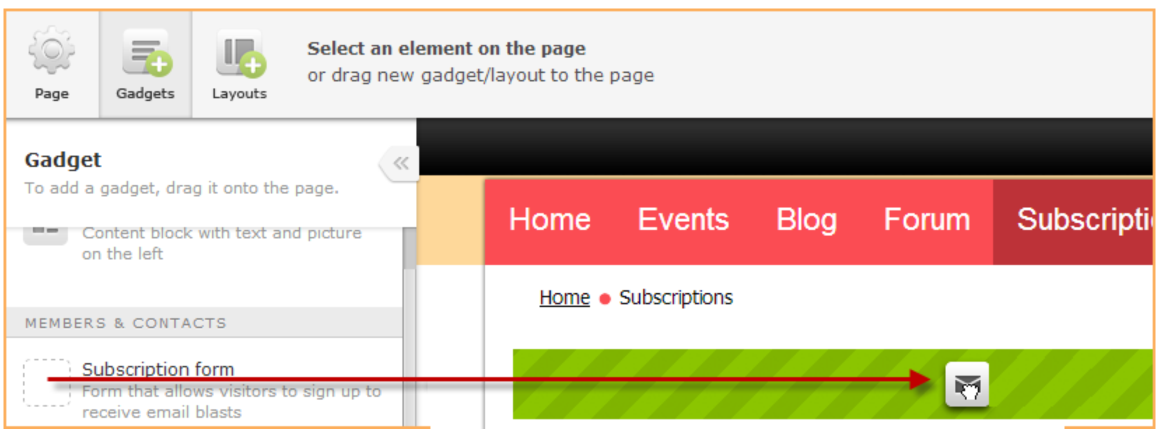
Setting up an email subscription form

You can create as many different subscription forms as you wish. You can limit access to a subscription form by placing it on a restricted page.

To add a subscription form to a page on your site, follow these steps:

Read more/less

1. Go to **Sites pages** (under the **Website** menu) and create or begin editing the site page where you want the blog to appear.
2. Click the **Gadgets** icon to display the list of available gadgets.
3. Drag the subscription form gadget from the list, and drop it where you want it to appear on the page. You can insert it into a section within a layout, or above or below a layout.



   When a layout cell or placeholder is empty, a **Drop gadget or layout here** prompt will be displayed. When you drag a gadget over an empty layout cell or placeholder, it turns green, indicating that you can drop the gadget there. When you drag a gadget above or below a layout, a prompt will appear indicating that you can drop the gadget before or after the layout.
4. After you have dropped the gadget in the desired location, hover your pointer over it and click the **Settings** icon.

5. From the gadget settings panel on the left, choose the desired settings for the subscription form, including the subscription source. For more information, see Adjusting subscription form settings (below).
6. Click **Save** to save the changes to the page.

For instructions on restricting access to the page, see Page access and visibility.

Adjusting subscription form settings

Once you add a subscription form gadget to a page to your site, you can modify its settings, include the subscription source.

Read more/less

Gadget settings appear in a panel on the left side (which can be hidden to maximize the page design area). To display the settings panel, you position your pointer over the gadget – while editing a site page – then click the gadget's **Settings** icon.

You can modify the following settings for subscription form gadgets:

Setting	Description
Subscription source	The name used to identify this subscription source. This name is used to distinguish different subscriptions when searching for subscribers using **Subscription source** as the search criteria. For example, depending on what people are signing up for, you might want to use *Newsletter* or *Site update alerts* are the subscription source.
Fields to include	Select the fields to be included on the subscription form. You can choose some or all of your common fields, but you cannot deselect the **Email** field. If included on the form, the **First name** and **Last name** fields must be completed before clicking the **Sub scribe** button.
Send confirmation email to	Choose whether to send a confirmation email to the subscriber and/or the administrator. To customize the standard subscription confirmation email, go to **Settings** and click **Subscription form email** under **Contact settings**. Within the body of the email, you can add or replace text, links, pictures, and macros using the con tent editor.
Margins	The amount of space – in pixels – that appears outside the gadget. You can set top, bottom, left, and right margins separately.
HTML ID	A unique identifier by which the gadget can be referenced within custom CSS or JavaScript code. The identifier is automatically generated but can be replaced with a more readable or memorable one (e.g. MySubscriptionFormGadget).
CSS class	The name of a CSS class defined on the CSS customization scre en.
Inline style	CSS code to control the behavior or appearance of the gadget. For example, you could enter *width: 250px;* to control the gadget width.

Changing colors and fonts

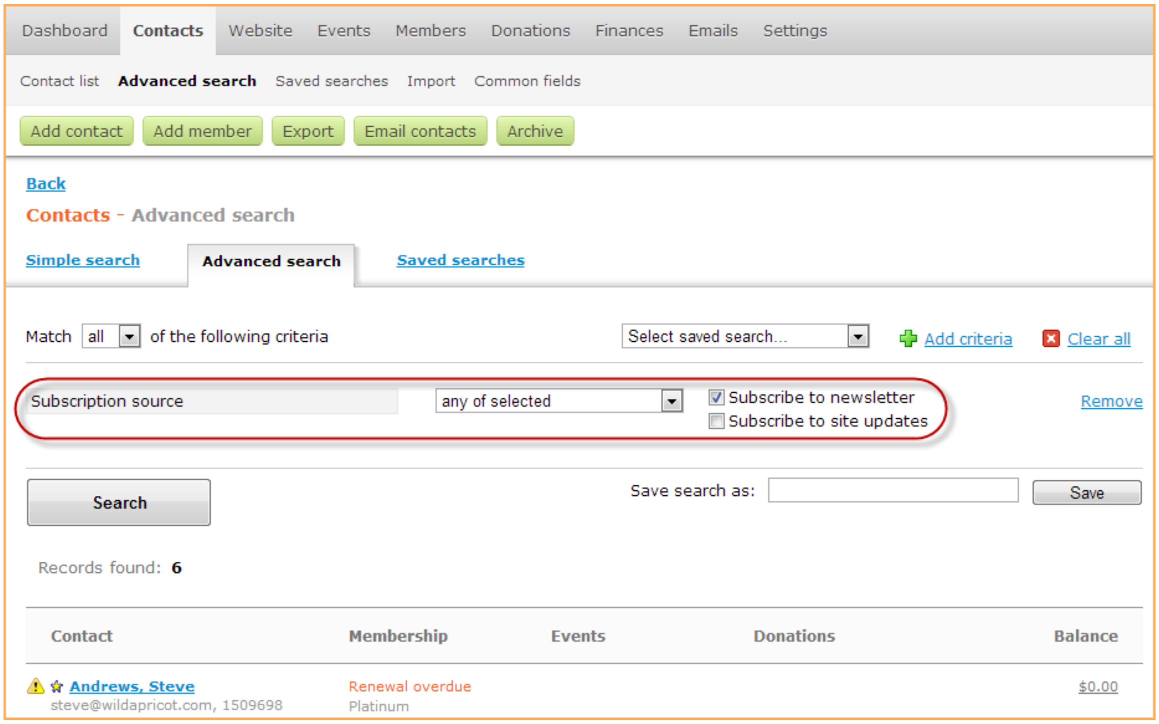
You can change the colors, text styles, and backgrounds used in your website from the Colors and styles screen. For a list of subscription form elements you can customize, click here. For more advanced fine-tuning, you can use CSS customization and theme overrides.

Searching for and emailing subscribers

When a visitor signs up for a subscription, the subscription is identified using the **Subscription source** specified for the form within the subscription form gadget settings.

Read more/less

To search for all contacts who have subscribed to receive emails via a particular subscription form, perform an advanced contact page, using **Subscription source** as the search criteria and selecting the appropriate subscription source value(s).

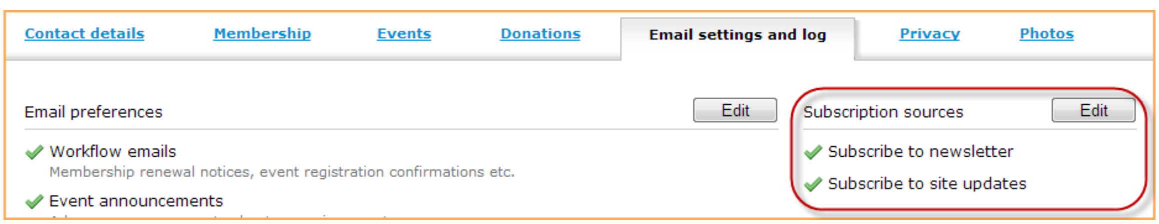


Once you have displayed a list of subscribers, you can email them the content they signed up for by clicking the **Email contacts** button.

Changing email subscriptions

To view which email subscriptions a contact is currently signed up for, look under **Subscription sources** on the **Email settings and log** tab of the contact record.

Read more/less



To change the subscription sources for a contact, click the **Edit** button. On the screen that appears, check the sources you want to subscribe the contact to.

On this page:

- Using a subscription form
- Setting up an email subscription form
- Adjusting subscription form settings
- Changing colors and fonts
- Searching for and emailing subscribers
- Changing email subscriptions

Expand all sections

See also:

- Contact email settings and log
- Sending email blasts
- Adding Wild Apricot functionality to other websites

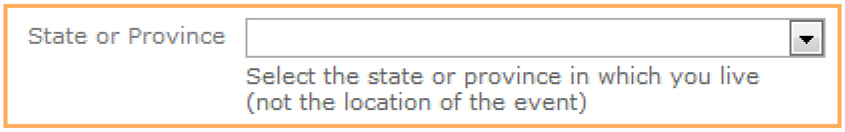
- Subscription form widget

Adding field instructions

Adding field instructions

You can add instructions to individual form fields explaining how to use them. On some forms, such as application forms, certain fields can require more explanation than a field label can provide.

The instructions you provide will appear on the form below the field.



The instructions will only appear when the form is being filled out.

From the Colors and styles screen, you can change the overall appearance of field instructions – typeface, size, color, etc. – but you cannot apply local formatting (such as bolding individual words).

Where can I add field instructions?

You can add field-level instructions to fields appearing on online forms provided by Wild Apricot. You cannot add field-level instructions to custom forms.

Read more/less

You can add field instructions to:

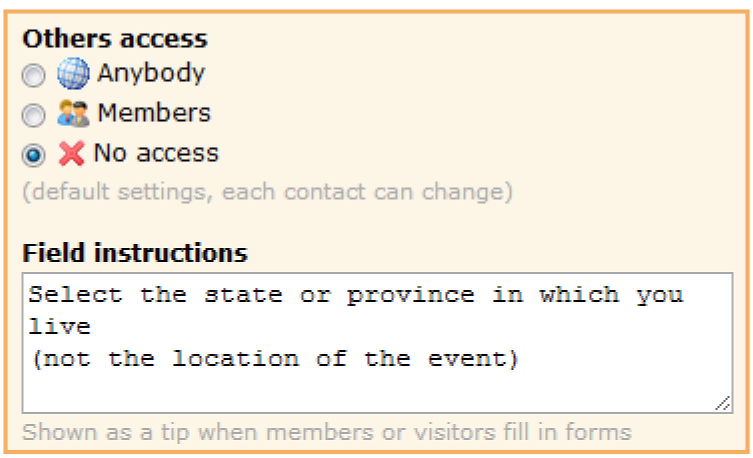
- common fields
- memberships fields
- event fields
- donation fields

You can add instructions to both system and non-system fields, except for the User ID system field.

How do I add field instructions?

When adding or modifying a field, enter the instructional text in the **Field instructions** box towards the bottom.

Read more/less



You can enter up to 250 characters per field, and use the Enter key to add line breaks. You cannot use HTML code or any other kind of local formatting.

Changing the appearance of field instructions

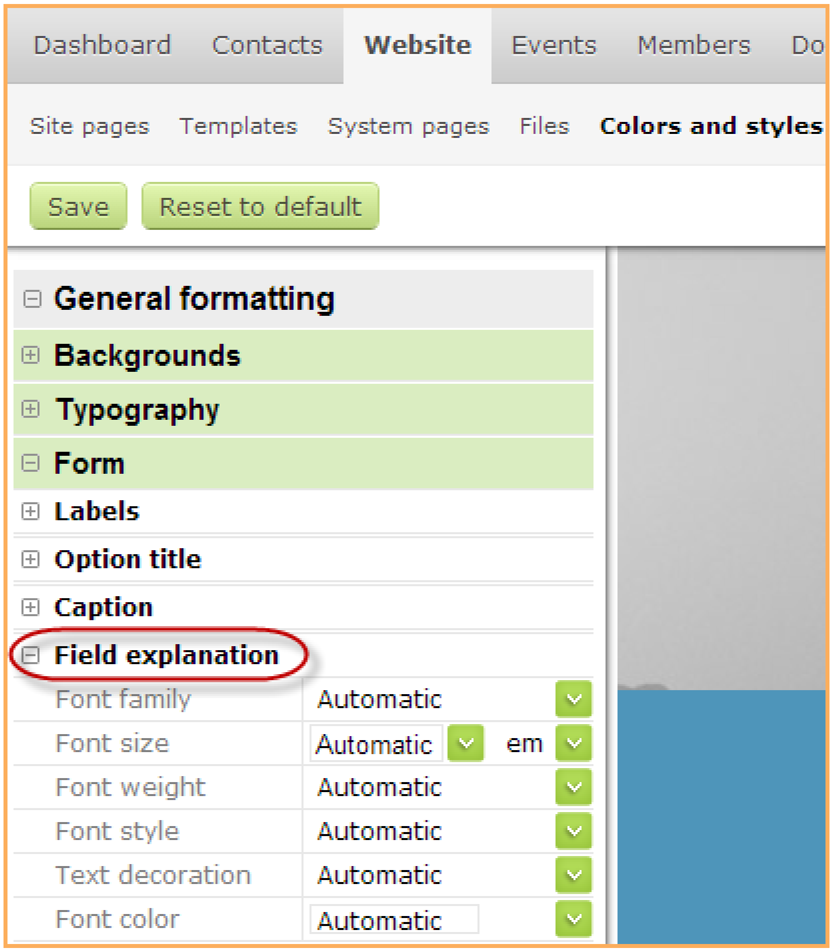
On the Colors and styles screen, you can change the appearance of field instructions on your site. You can control the typeface, text size, color, and other attributes.

Read more/less

You cannot change the appearance of individual instructions or selected words within a set of instructions.

To control the appearance of field instructions, follow these steps:

1. Under the **Website** menu, click **Colors and styles**.
2. Expand the **General formatting** section.
3. Expand the **Form** section.
4. Expand the **Field explanation** section.



5. Adjust the following settings.

Option	Description
Font family	Typeface used to display the text.
Font size	The size of the text. You can specify the font size in pixels, points, or ems.
Font weight	Whether the text is bold or not.
Font style	Whether the text is italicized or not.
Text decoration	Whether the text is underlined or not.
Font color	The color of the text.

6. Click **Save**.

The attributes you specify will be applied to all field instructions on your site.

On this page:

- Where can I add field instructions?

- How do I add field instructions?
- Changing the appearance of field instructions

Expand all sections

Site searches

Site searches

You can add a search box to allow visitors to search your site for a particular text string.

The search can encompass static site pages – including hidden and restricted pages – as well as dynamic content such as blogs, forums, events, and member profiles. The visitor can filter the search results – which are subject to the visitor's access permissions – and jump to any of the matching content.

The ability to add a site search box is not available for free plans. For more information, see Functionality by billing plan.

From the site search settings, administrators can control whether events, member profiles, and hidden pages – those not included in your site menu – are included in the search results. By default, they are not included.

Search boxes – like other site content – are inserted as gadgets, in this case, a site search gadget. From the site search gadget's settings, you can control the appearance and behavior of the search box, and set the default content to be searched.

Setting up a site search box

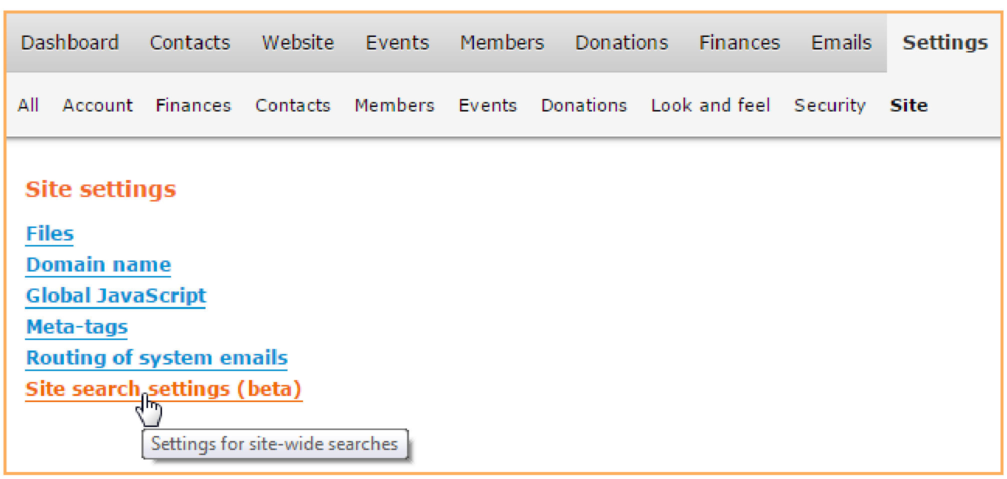
Setting up a site search box involves adjusting the overall site search settings, adding a site search gadget, and adjusting the gadget's settings.

Site search settings

From the site search settings, you can control whether certain kinds of content are included in site search results.

Read more/less

To display the site search settings, hover over the **Settings** menu and select the **Site** option. From the list of site settings, click **Site search settings**.



The following settings are available:

Setting	Description
Search pages not in menu	Controls whether hidden pages – those not in your site menu – can be included in the search results. Menu pages are always included in search results depending on their access settings.
Search events	Controls whether events can be included in the search results. If this option is disabled, then events will not be available as a default content option within the site search gadget settings. The event title, details, and description will be searched but not the event tags.
Search public member profiles	Controls whether members' public profiles can be included in the search results. If this option is disabled, then public member profiles will not be available as a default content option within the site search gadget settings. Even with this option enabled, individual member profiles can be excluded from search results by hiding them using member privacy settings.

Adding a site search gadget

To add a search site box to a page on your site, follow these steps:

Read more/less

1. Go to **Sites pages** (under the **Website** menu) and create or begin editing the page or page template where you want the search box to appear. Typically, search boxes are added to a page template so that it automatically appears on all pages that use the template.
2. Click the **Gadget** icon to display the list of available gadgets.
3. Drag the site search gadget from the list, and drop it where you want it to appear on the page. You can insert it into a section within a layout, above or below a layout, or above or below another gadget.

When a layout cell or placeholder is empty, a **Drop gadget or layout here** prompt will be displayed. When you begin dragging a gadget, possible destinations for the gadget appear blue. When you drag a gadget over an empty layout cell or placeholder, it turns green, indicating that you can drop the gadget there. When you drag a gadget above or below a layout or another gadget, a prompt will appear indicating that you can drop the gadget before or after the layout.

4. After you have dropped the gadget in the desired location, hover your pointer over it and click the **Settings** icon.

5. From the gadget settings panel on the left, choose the desired settings for your search box. For more information, see Site search gadget settings (below).
6. Click **Save** to save the changes to the page or page template.

Site search gadget settings

From the site search gadget's settings, you can control the appearance and behavior of the search box.

Read more/less

To display these settings, hover over the gadget and click the Settings icon. The following settings are available for site search gadgets:

Setting	Description
Limit default search to specific content types	Controls the content types that are initially included in the search results. Visitors can enable or disable content types to filter the search results themselves. Events and member profiles will be included as options only if they are enabled within the site search settings (see above).
Search prompt	The text that is displayed within the search box before the visitor enters a search string.
Show suggested matches	Controls whether suggested matches are displayed within the search box.
Align	Controls whether the search box is left aligned, right aligned, or centered within the gadget.
Gadget title	If you specify a gadget title, the title will appear specially formatted within the gadget. Depending on the gadget style you choose, the title may appear in a heading box.
Gadget style	The gadget style determines the physical appearance of the gadget. The style you choose will determine the color and format of the gadget title, the gadget content, and the gadget border. You can choose from theme-specific styles and styles that are common to all themes.
Margins	The amount of space – in pixels – that appears outside the gadget. You can set top, bottom, left, and right margins separately.
Advanced	Within the **Advanced** section, you can enter CSS code or classes to further control the appearance and behavior of the gadget. For more information, see Advanced gadget settings.

Using a site search box

To search your site using a search box, visitors simply enter the search text in the box.

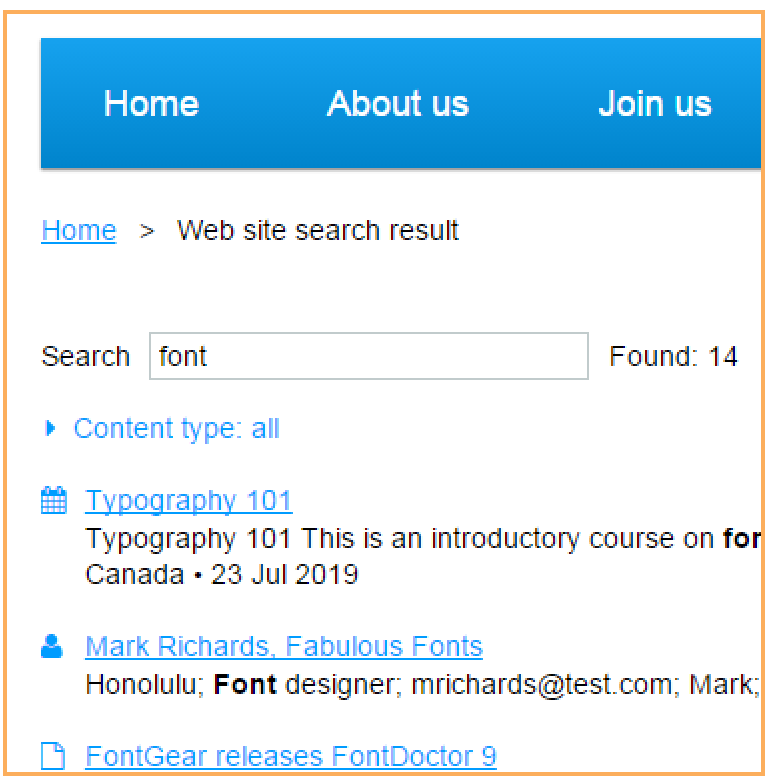
If the **Show suggested matches** option is enabled within the site search gadget settings , a list of possible matches will appear.

Read more/less

The visitor can click any of the suggested matches to jump to the corresponding content, or they can click the Search link at the bottom to view the full search results.

If you have disabled the **Show suggested matches** option, then the visitor can click the **Enter** or **Return** key to view the full results.

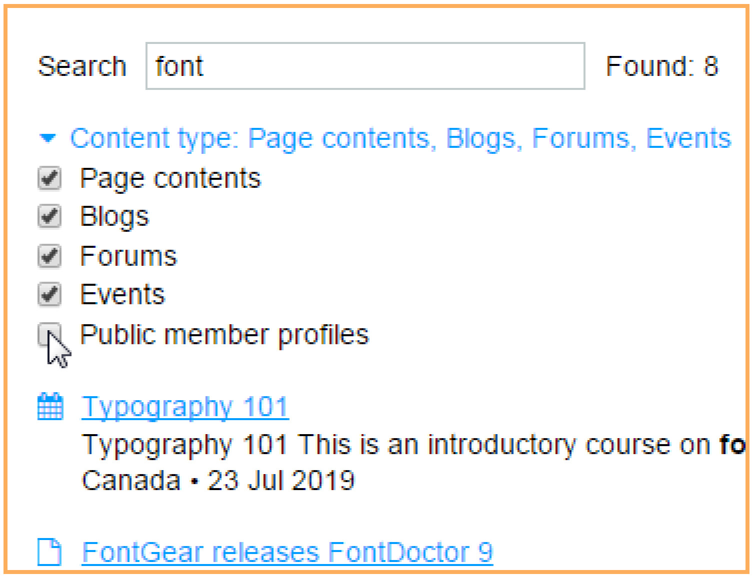
The search results will be sorted according to relevance. Icons are used to distinguish between the different kinds of content. Each result consists of an excerpt from the content, along with the date and author where applicable, and a link to the full content.



The results will be automatically restricted according to the access permissions and restrictions assigned to the content. The visitor can only search for content that they could otherwise view within your site. Hidden pages – those not included in your site menu – will only be returned if the **Search pages not in menu** option is enabled within the site search settings.

If the matching content was found in multiple locations, (e.g. forum summary, forum updates, and the forum post itself), the most detailed result will be returned (in this example, the full forum post).

Initially, the search will only be conducted within the content types enabled from the site search gadget settings. After the search results are displayed, the visitor can filter the results themselves by enabling or disabling different content types. To enable or disable content types, the visitor expands the **Content type** control by clicking on it, then checks or unchecks the various content types.



The **Events** and **Public member profiles** options will only be available if they have been enabled within the site search settings. Individual member profiles that have been hidden using the member privacy settings will not be included in any search results.

What gets searched?

Depending on your site search settings and site search gadget settings, the following content can be searched.

Read more/less

Content type	Content to be searched
Page contents	Content gadgets, gadget titles, identifiers, and descriptions. Page contents are searched according to the visitor's access permissions (e.g. if the visitor can't view a page, they can't search for it either). By default, hidden pages are not included in the search results, but this can be changed from the site search settings.
Blogs	Blog post title, content, and comments.
Forums	Forum topics, content, and replies.
Events	Event title, location, and description. Event tags are not searched. By default, events are not included in the search results, but this can be changed from the site search settings.
Member profiles	All contact fields, except rules and terms, date fields, and cost field values (field label is searched). By default, member profiles are not included in the search results, but this can be changed from the site search settings.

If a site search gadget is located on a page that forms part of a widget – a Wild Apricot module that appears on another website – the search will be performed across the Wild Apricot site, not the site on which the widget appears.

Search considerations

- Search is performed on whole words only. Searching for "fon" won't find pages with the word "font". However, morphological searches are supported. For example, searching for "perform" will find pages with the word "performed".
- So-called stop words – and, or, the, etc. – within the search string are ignored.
- The autosuggestions include only pages with matching text in the page title, forum topic subject, blog post subject, event title, or member name. Full page search is available only in full search results.
- If a forum's permission is set to **No access**, but the page is accessible to a particular user, then links to the forum can appear in the search results, though clicking on them will generate an access denied error.
- When searching for events, the event title, details, and description are searched but not the event tags.

Troubleshooting

- If the search doesn't work, check to make sure that JavaScript support is enabled in your or your visitor's browser settings
- New and updated pages have to be indexed before they can be searched. The indexing of your site takes place automatically in the background on a regular basis. You may have to wait several minutes before changes or additions to your site are reflected in the search results.

On this page:

Expand all sections

Adding custom content

Adding custom content

Custom content is content that you add using the content editor. Custom content is distinguished from dynamic content that displays or updates information from your Wild Apricot database or an external source. Unlike dynamic content – upcoming event lists, member directories, etc. – custom content does not change unless you manually update it.

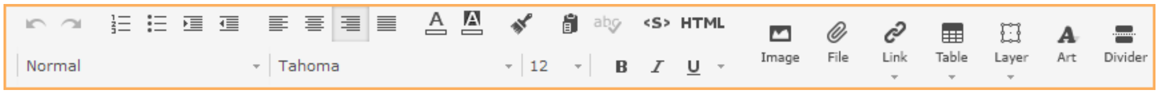
Custom content can include:

- text
- pictures
- tables
- links
- dividers
- custom HTML or JavaScript

You can add custom content to any of the following:

- a content gadget on a site page or page template
- an email or email template
- an event description

To add custom content, you click the icons and options appearing on the content editor toolbar.



See also:

Using the content editor

Using the content editor

Using the content editor, you can add your own custom content to site pages, page templates emails, email templates, or event descriptions. Your custom content can include:

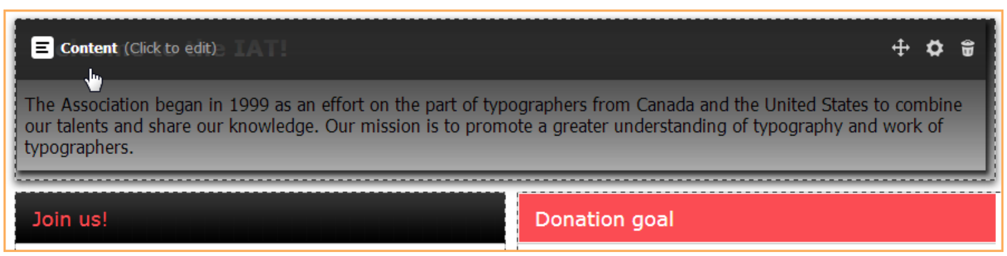
- text
- pictures
- tables
- links
- dividers
- custom HTML or JavaScript

> ⓘ Custom content is added to site pages using content gadgets.

You can format the text, using inline formatting or text styles, or use ArtText to create stylized text with special effects such as drop shadows. You can link text and pictures to a page on your site or another site, and provide links to documents stored in your account or on another site. For content gadgets, you can layer and overlap content so that text can appear on top of a picture, for example.

Displaying the content editor

To display the content editor while editing a site page or page template, position your pointer over a content gadget then click anywhere within the gadget.



Now, you can use the options appearing on the content editor toolbar to add or modify the content within the gadget.

To display the content editor while editing an email, email template, or event description, simply click within the email body or event description.

Adding and formatting text

To add text while editing a content gadget, email, or event description, simply start typing. If are using a layer to control the positioning of the text, click within the layer before you start typing.

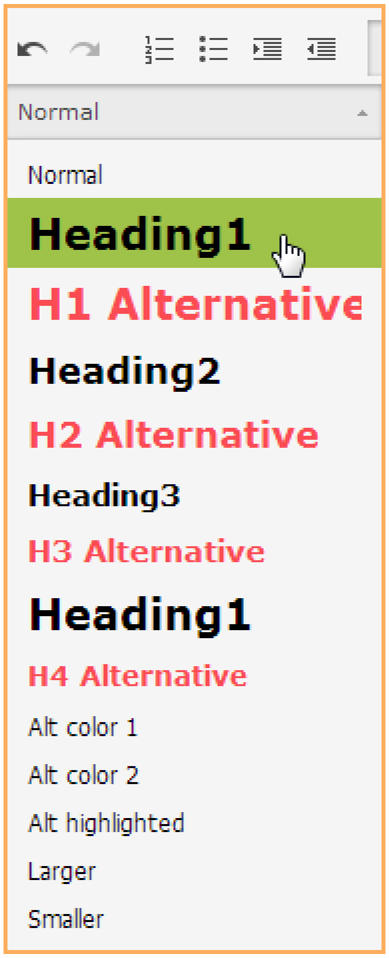
You can set text attributes, copy and paste text and text styles, and control paragraph formatting.

Read more/less

Setting text attributes

To control text attributes, such as typeface, point size, and color, select the text you want to format then click the appropriate option within the toolbar. You can set the text attributes individually or select a predefined paragraph style from the style drop-down list.

Read more/less



Paragraph styles not only save you the trouble of selecting multiple text attributes individually, but they also promote consistency since the same paragraph styles are available throughout your site. Paragraph styles are theme-specific and can be modified from the Color and Styles screen. Any changes you make to paragraph styles there will be immediately applied to your entire site.

When you apply a paragraph style, it will be applied to the entire paragraph, not just the selected text. If you apply text attributes locally – using toolbar options other than text styles – the attributes will be applied to the selected text only.

> Applying a paragraph style will not override local text formatting – the formatting that is applied to selected text. For example, if you format a word within a paragraph to appear red, then applying a paragraph style to the paragraph will not change the color of that word.

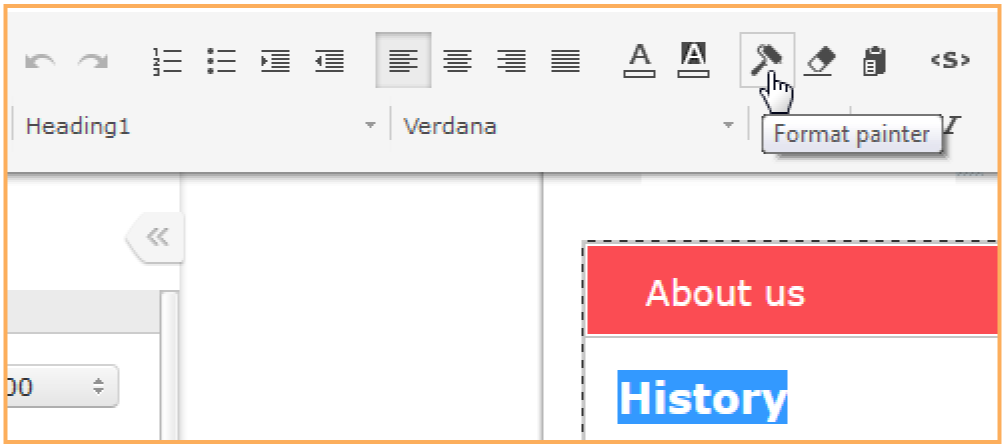
Copying text styles and text attributes

You can copy text styles and text attributes from one chunk of text to another chunk of text or to an entire paragraph. Depending on how the original chunk of text was formatted and how you select the text to be formatted, you can copy the style of the text – e.g. Heading 1 – or just its attributes – e.g. 12 point bold Verdana.

Read more/less

> You can only copy text styles and text attributes within the same content gadget, email, or event description.

To copy formatting from a chunk of text, select some or all of the text, click the **Format painter** icon within the content editor toolbar.



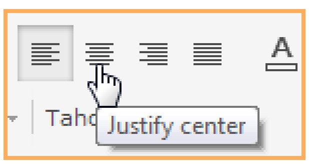
To apply the copied formatting to an entire paragraph, click within the paragraph without selecting any of its text. If the text you copied the formatting from had text styles applied, then the style will be applied to the paragraph. If the original text used localized or inline formatting rather than text styles, then its text attributes will be applied to the paragraph.

To apply the copied formatting to selected text only, select the text you want the formatting to be applied to. The attributes of the original text will be applied to the selected text as inline formatting, regardless of whether the original text was formatted using text styles or inline formatting.

Controlling paragraph formatting

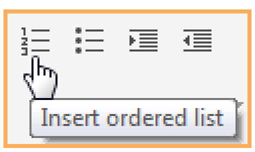
By default, text will appear in the upper left corner. Using the formatting options appearing on the toolbar, you can control the alignment of the text.

Read more/less



You can separately control the positioning of each paragraph within the gadget, email body, or event description.

You can also apply other paragraph formatting such as bullets, numbering, and indenting.

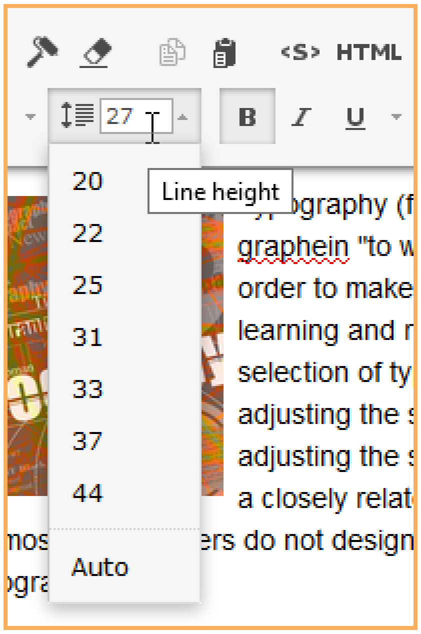


Line spacing

When editing site pages, email, and event descriptions, you cannot control paragraph spacing – the amount of vertical space between paragraphs – but you can control line height or line spacing (aka leading) – the vertical space between lines within a paragraph. You can set the line height separately for each paragraph, or change the line height for multiple paragraphs.

Read more/less

To set the line height for a single paragraph, click anywhere within the paragraph, then click the line height icon in the toolbar.



From the menu that appears, you can choose a height (in pixels), or type the height you want to apply. If you select the **Auto** option, the default line height will be applied.

To control the line height for multiple paragraphs, select portions of the paragraphs before clicking the line height icon.

Paragraph breaks and line breaks

When editing site pages, email, and event descriptions, you cannot control paragraph spacing – the amount of vertical space between paragraphs. You can, however, use keyboard combinations to insert either a paragraph break or a line break.

Read more/less

The different key combinations depend on which browser you are using, and whether your cursor is currently located within an existing paragraph.

To add a paragraph break, press the **Enter** key. To add a line break, hold down the **Shift** key and press the **Enter** key (except on Safari).

In your page's HTML code, a paragraph will appear as:

<p> .... paragraph text ... </p>

A line break will appear as:

For advanced control of spacing, you can customize the CSS code.

Pasting text from other sources

To paste text copied from another source – such as Microsoft Word, Google Docs, Apple's Pages, a website, or an email – click where you want the text to appear then click the **Paste** icon within the content editor.

Read more/less

On browsers other than Internet Explorer, you may be prompted to use keyboard shortcuts instead of the Paste icon to paste your text.

When pasting formatted text, the content editor will try to preserve as much of the formatting as possible, but will discard any incompatible formatting – formatting that it cannot reproduce itself. For more information, see Pasting content from other sources.

To completely avoid introducing formatting issues, we recommend that you paste only clean text – text without formatting. To paste text without formatting, use the Ctrl + Shift + V shortcut on Windows, and the Command + Shift + V shortcut on a Mac.

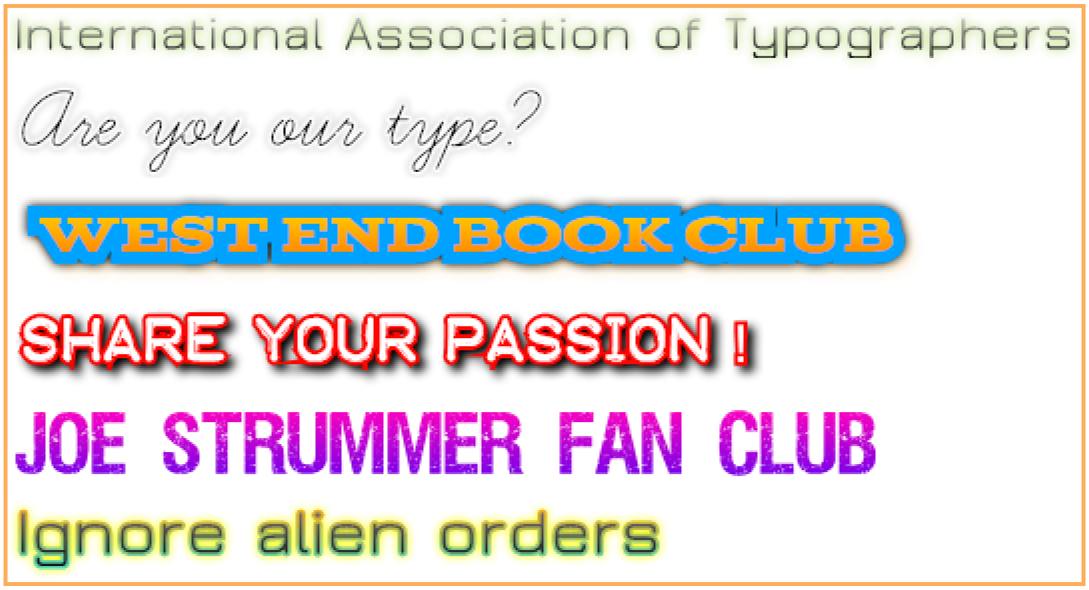
Clearing formatting

To clear all character formatting – formatting applied directly to text, rather than through text styles – select the text you wanted cleared, t hen click the **Clear formatting** icon within the content editor.

Adding ArtText

ArtText allows you to create fancy looking text with special effects like 3D and drop shadows. You can use ArtText to produce exciting and colorful headings for your site header, site pages, and event descriptions.

Read more/less

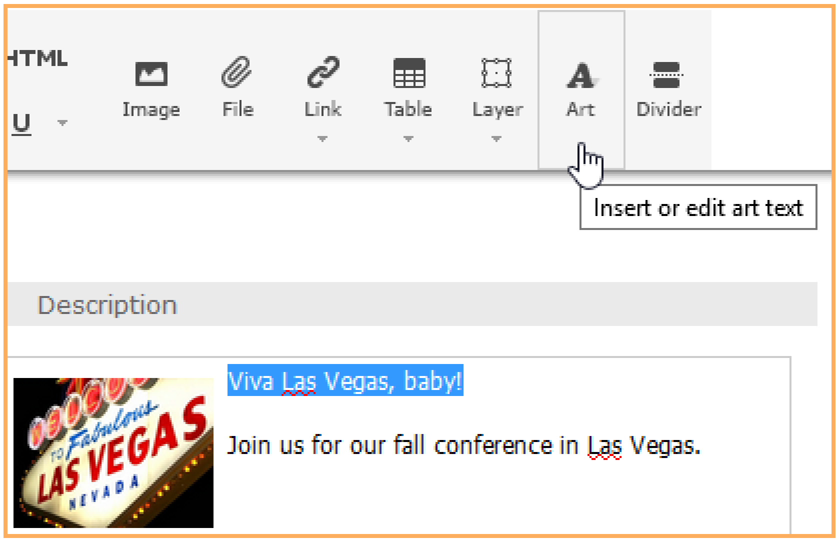


When you create a piece of ArtText, you can choose from a variety of fonts, styles, and colors. When you save it, an image file is generated containing the text and style that you have chosen. This way, you can be sure that the heading you have created will be the same for every visitor to your site no matter what kind of computer or browser they are using.

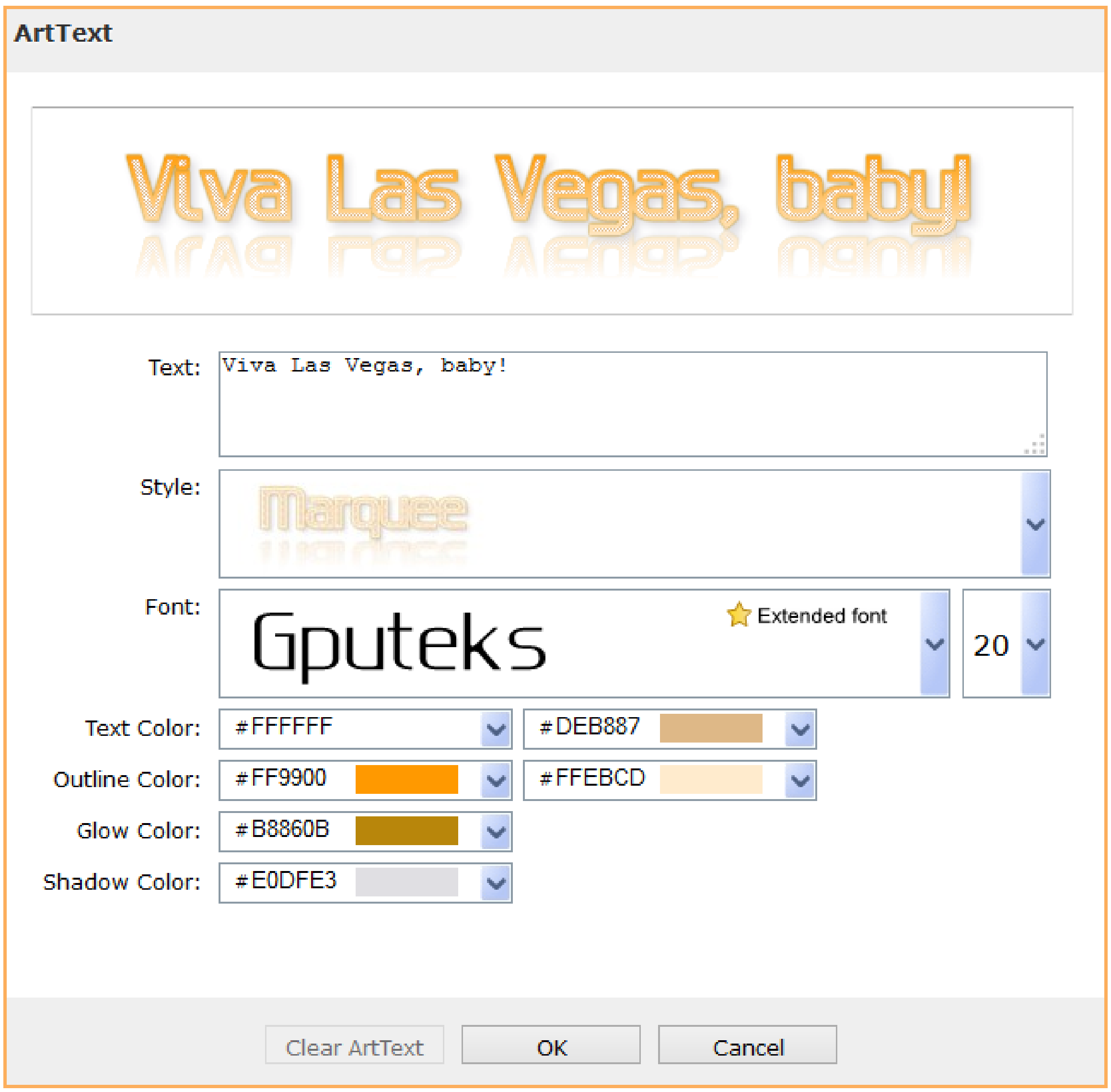
You can add ArtText to a content gadget or event description.

To add ArtText, follow these steps:

1. Either select existing text to use as the basis for the ArtText or wait to enter your text in a subsequent step.
2. Click the ArtText icon within the content editor toolbar.



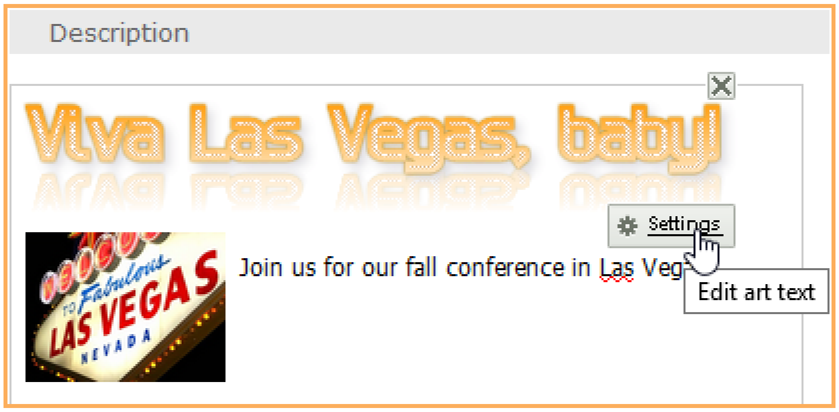
3. In the ArtText dialog that appears, you enter your text if you hadn't done so before selecting the ArtText option.
4. You can choose any of the predefined ArtText styles from the **Style** drop-down, or individually select the font, point size, text color(s), and effect color(s). A preview of your ArtText design appears at the top of the dialog.



5. Once you've modified the ArtText to your satisfaction, click the **OK** button.

Your plain text will now be replaced with an image of the stylized text you just created.

To modify existing ArtText, position your pointer over the ArtText, then click the **Settings** option in the bottom right corner.



The ArtText dialog will appear again, allowing you to make changes to your design.

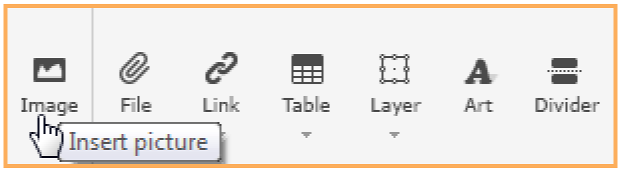
To clear the ArtText so that the text returns to its unformatted state, click the **Clear ArtText** button within the ArtText dialog.

Inserting pictures

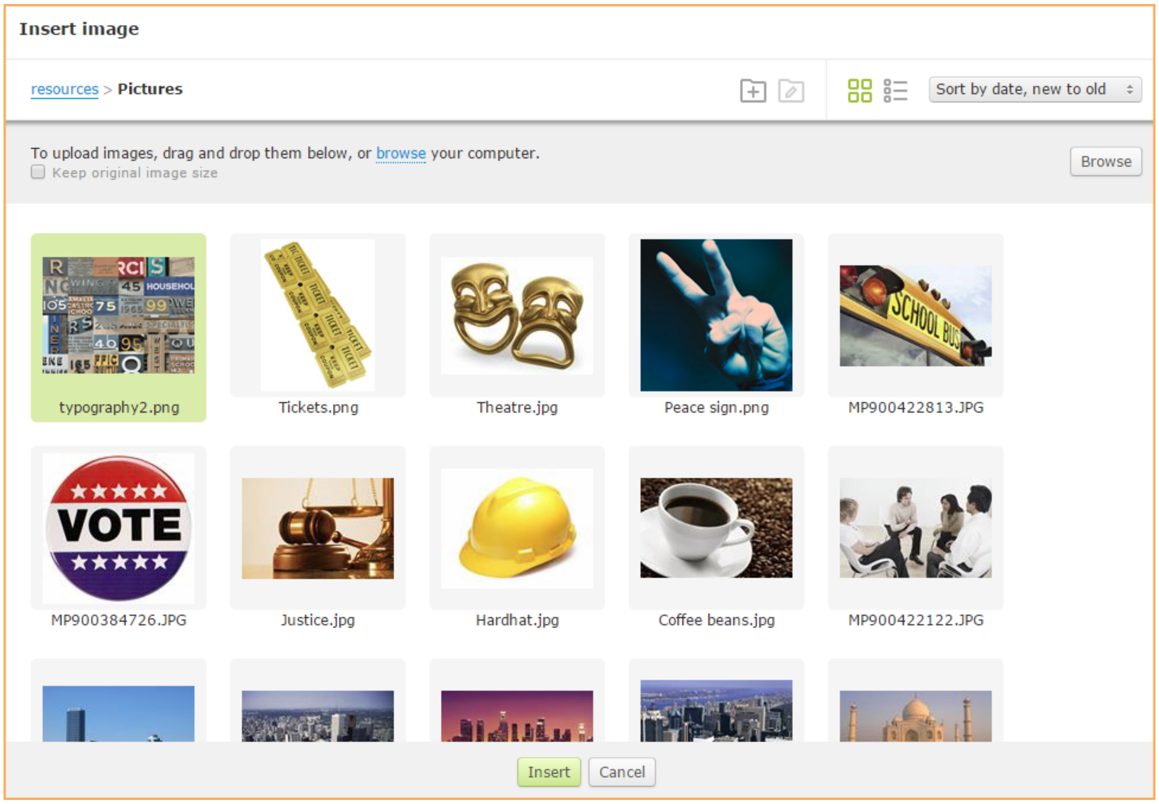
You can insert a picture into a content gadget, and in emails, email templates, and event descriptions.

Read more/less

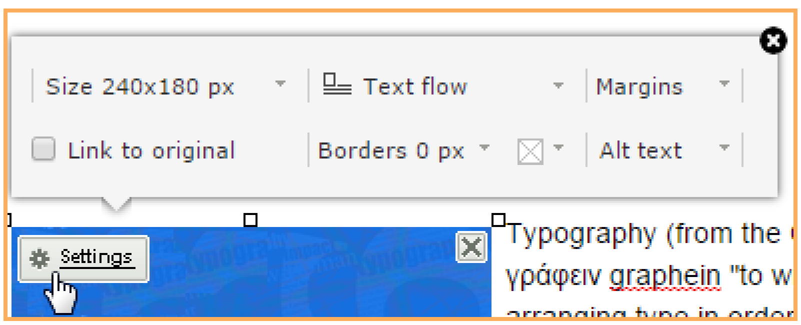
To insert a picture, click where you want the picture to appear then click the **Image** icon within the toolbar.



From the **Insert image** window that appears, you can choose a picture that is already in your account or upload new pictures from your computer or network.



After you've inserted a picture, you can set its properties by positioning your pointer over the picture and clicking the **Settings** icon. From the image settings toolbar that appears, you can change any of the image's settings, including s ize, alignment, margin, and borders, and how adjoining text wraps around the image.



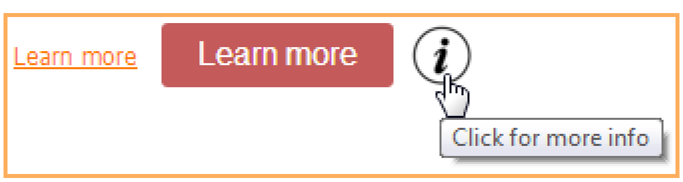
For more information, see Inserting pictures.

Inserting links

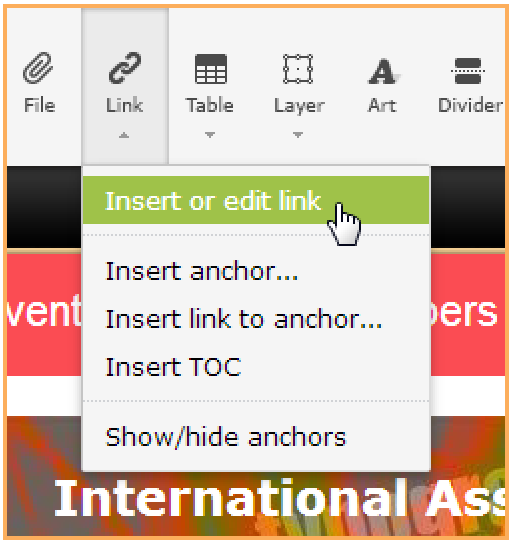
You can insert a link so that visitors to your site can click the link and jump to a page on your site or another site, or a section within the current page, or send an email.

Read more/less

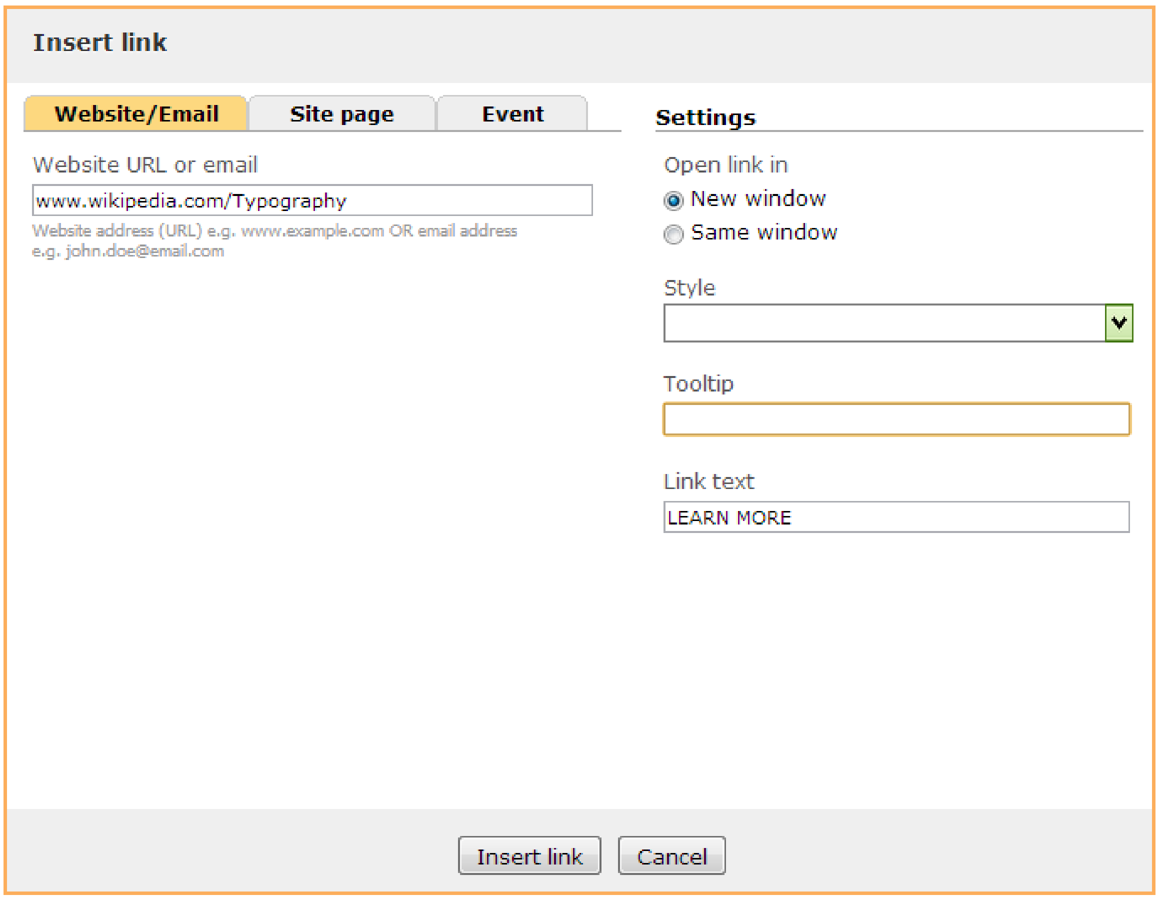
The link can appear as text, as a button, or as a picture.



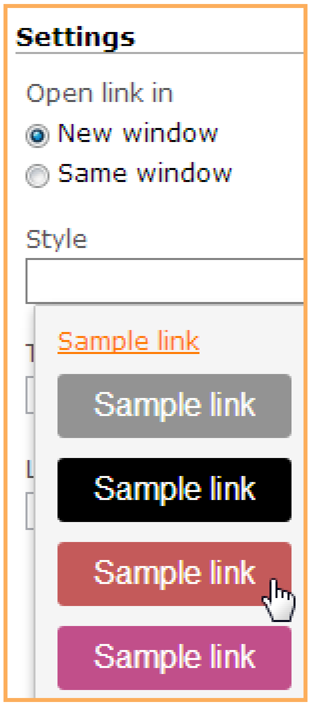
To insert a link as text or a button, either select the text within the content gadget, email, or event description, or click where you want the text to appear. To insert a picture link, click the picture within the page. Then, click the **Link** dropdown in the toolbar towards the top of the page and select **Insert or edit link**.



From the **Insert link** window that appears, you choose where the link should go to.



If you want the link to appear as a button, click the **Style** drop-down and select a button style.



You can also choose whether you want the linked page to open in a new window or the same window, and specify a tooltip to be displayed when a mouse pointer is positioned over the link.

If you didn't select the link text before selecting the **Insert link** option, you can specify it here as well.

For more information, see Inserting links.

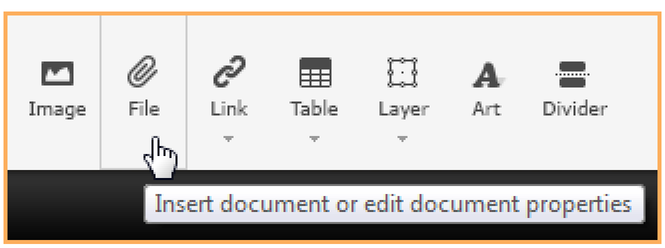
Inserting documents and files

On your Wild Apricot site, you can insert links to documents – such as PDFs, Word files, Excel files, etc. – that visitors to your site can view or download.

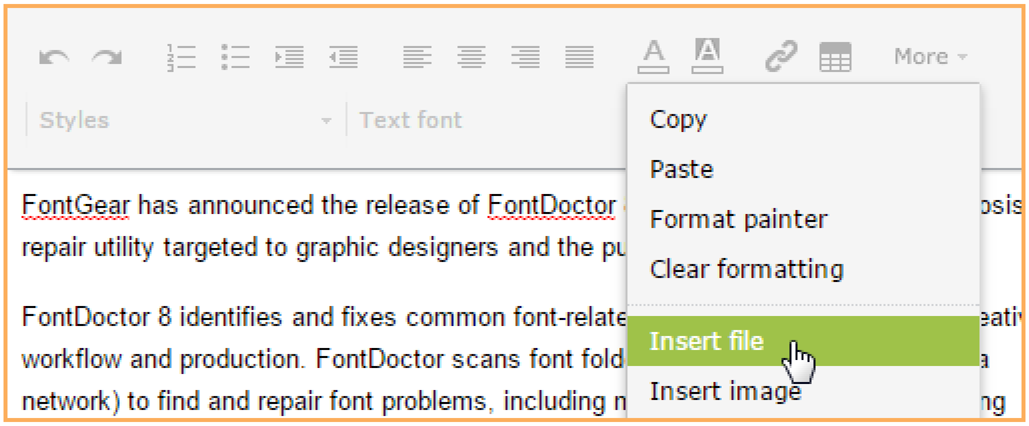
Read more/less

Clicking on the link will either open or download the document, depending on your browser and computer setup. You can insert links to documents stored on your Wild Apricot account, or on another site. You can upload documents to your Wild Apricot account as part of the process of inserting a document link, or by using file management or WebDAV.

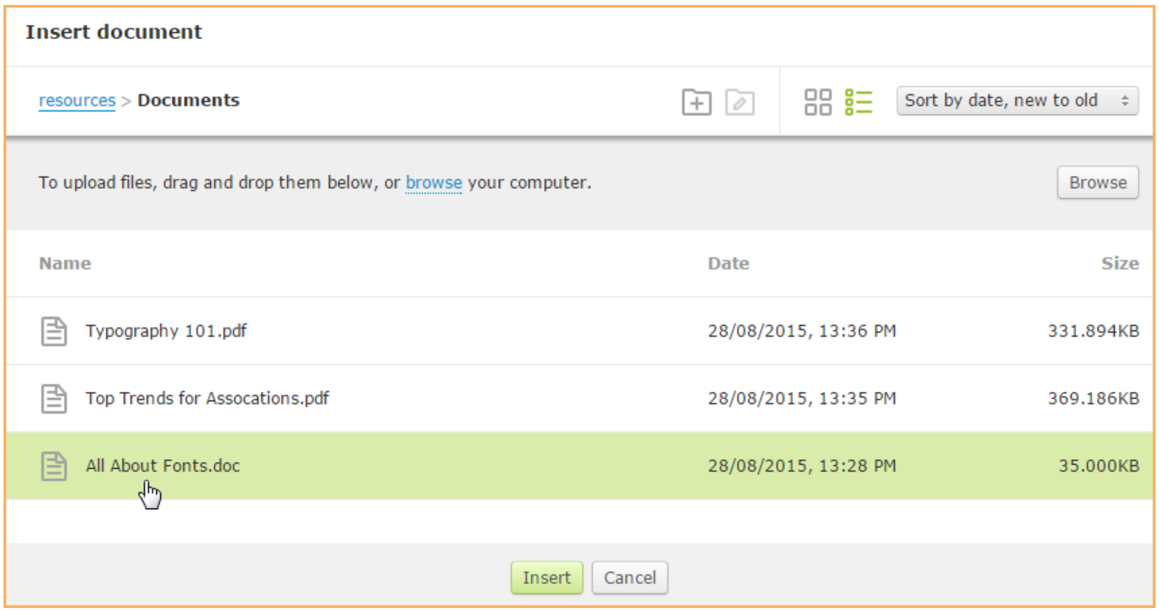
To insert a document link, click where you want the link to appear then click the **File** icon within the content editor toolbar.



For blog posts and forum topics, click the **More** menu and select the **Insert file** option.



From the **Insert document** dialog that appears, you can select a document already stored on your Wild Apricot account, or upload a document stored on your computer or network.



You can navigate between folders in your account, and add, rename, or delete folders. You can delete a file from this dialog, but you cannot copy or move them to a different folder. You can copy and move files from File management .

After you have selected the document you want to link to, click the **Insert** button.

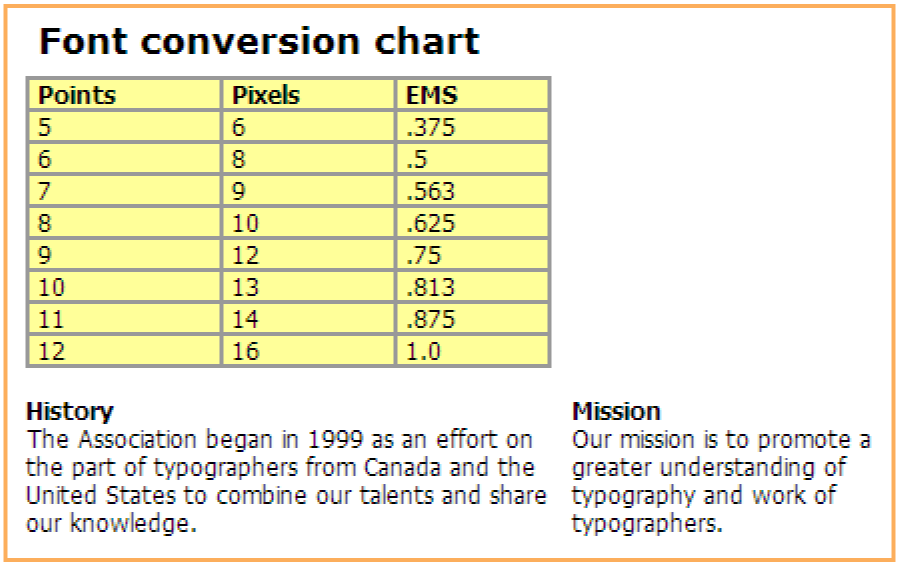
You can also embed documents so that they appear directly on your web page within an embedded document viewer available from third parties such as Google or Scribd. If you don't want to display the document within a web page, you can link to an external document viewer, so visitors can view the document without downloading it or having the required software to open the document.

For more information, see Inserting documents and files.

Inserting tables

You can insert a table into a page, page template, email, email template, or event description. You can create a regular table, showing information within columns and rows, or you can create tables without borders for advanced page layouts.

Read more/less



Font conversion chart

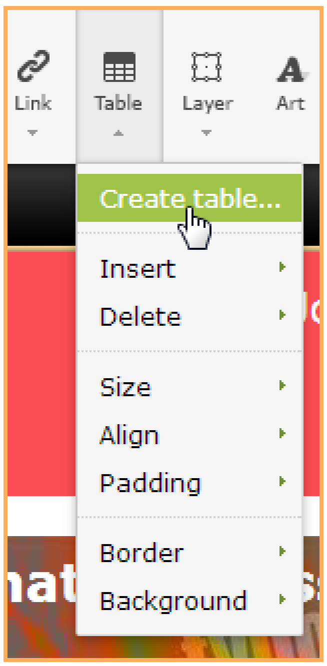
Points	Pixels	EMS
5	6	.375
6	8	.5
7	9	.563
8	10	.625
9	12	.75
10	13	.813
11	14	.875
12	16	1.0

History
The Association began in 1999 as an effort on the part of typographers from Canada and the United States to combine our talents and share our knowledge.

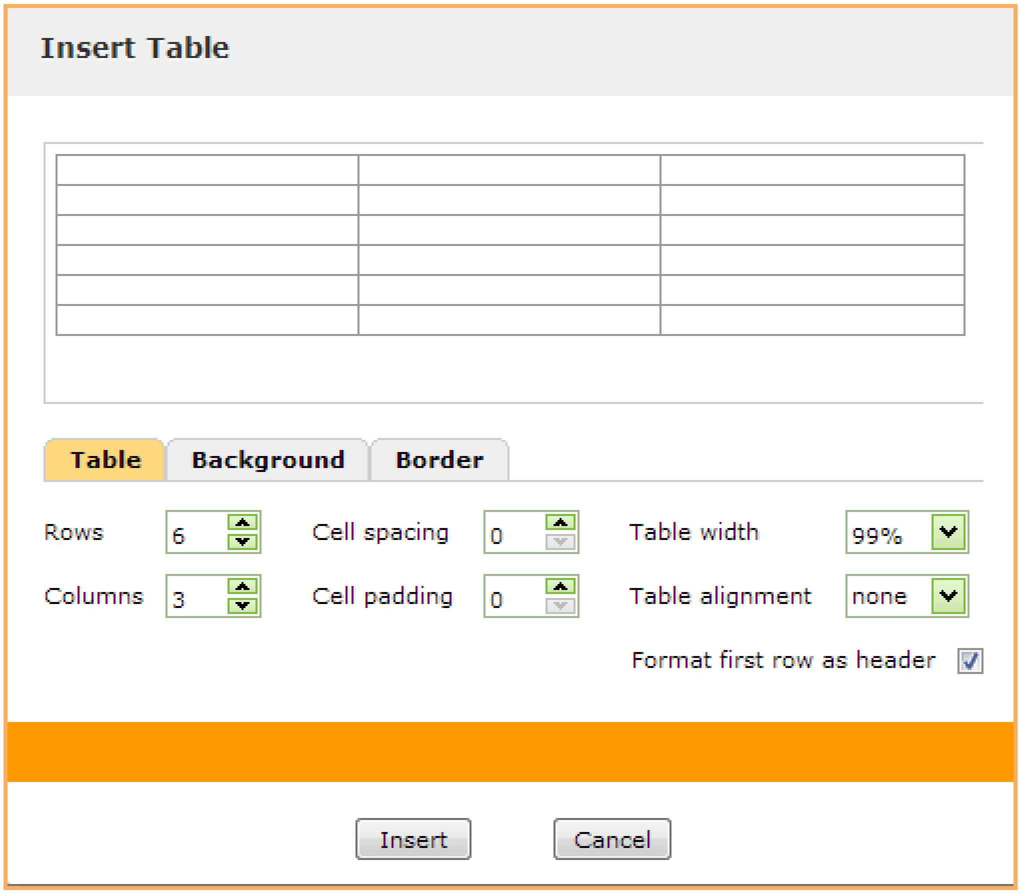
Mission
Our mission is to promote a greater understanding of typography and work of typographers.

For each table, you can specify the number of rows and columns you want, choose a background color, and set the border width and color. After inserting the table, you click inside the cells and start adding your content.

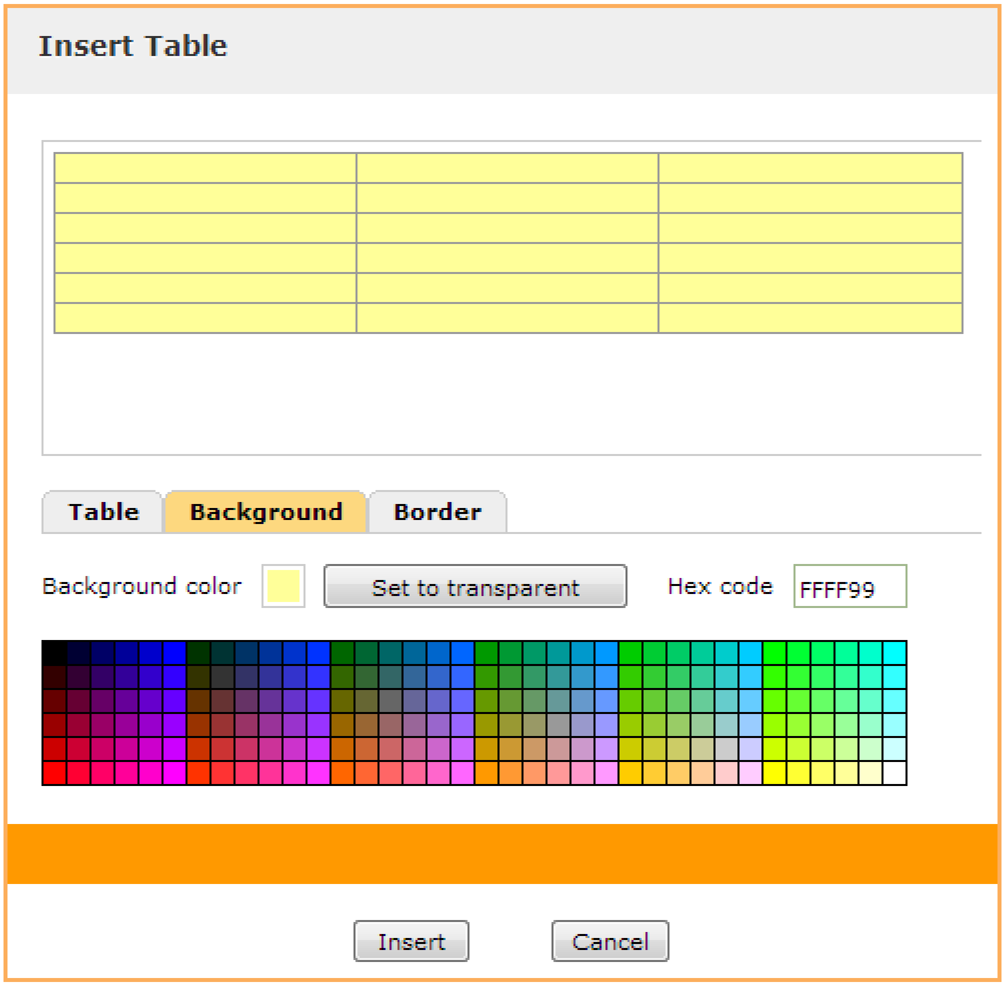
To insert a table into a page, page template, email, email template, or event description, click where you want the table to appear then click the **Table** icon within the content editor toolbar and select the **Create table** option.



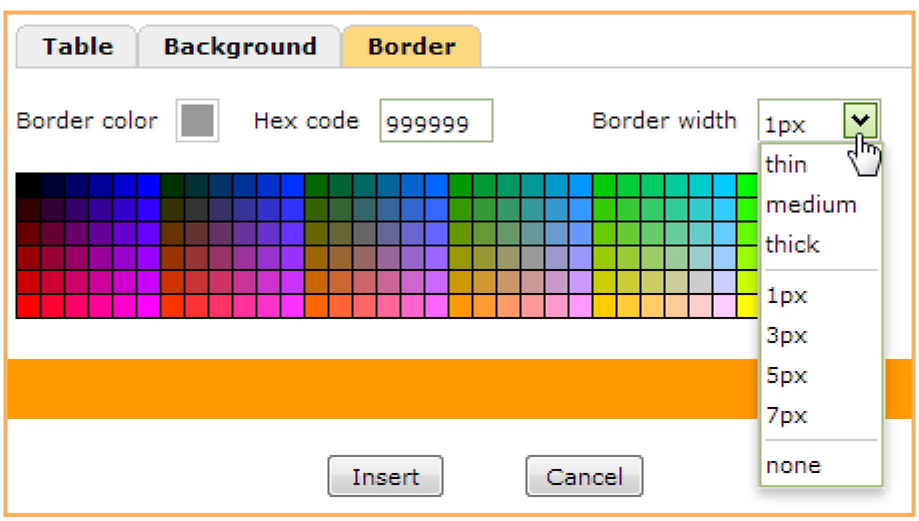
On the dialog that appears, you specify the table parameters, including the number of rows and columns, the spacing between tables cells, and the padding (or margin) within each cell. You can also specify the table width – what percentage of the available area it occupies, and the table alignment – where the table is left or right aligned within the available area. Finally, you can indicate whether the first row should be specially formatted as column headings.



On the **Background** tab, you select the background color of the table. You can click a color at the bottom or enter the hex code for the color. To make the background transparent, so that the page background shows through, click the **Set to transparent** button.



On the **Border** tab, you set the color of the cell borders within the table. You can click a color at the bottom or enter the hex code for the color. You can also select the cell border width. To remove the cell borders completely – to make the table invisible – set the **Border width** to **None**.



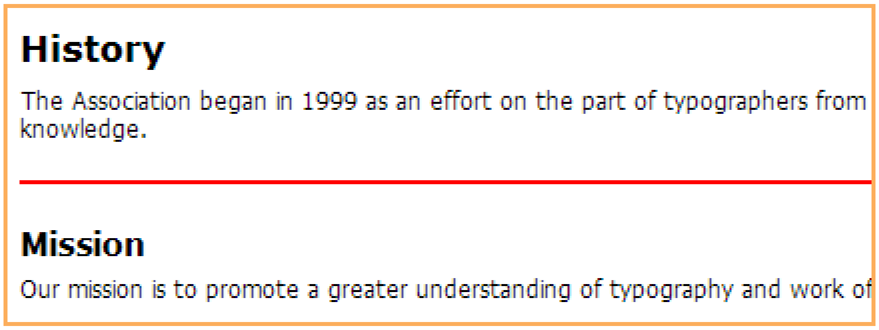
After you click the **Insert** button to insert your table, you can click within the table cells on the page and start entering text or adding other content.

For more information, see Inserting and editing tables.

Inserting ruling lines

You can insert a horizontal ruling line – aka divider, dividing line, or rule – into a site page, page template, or event description.

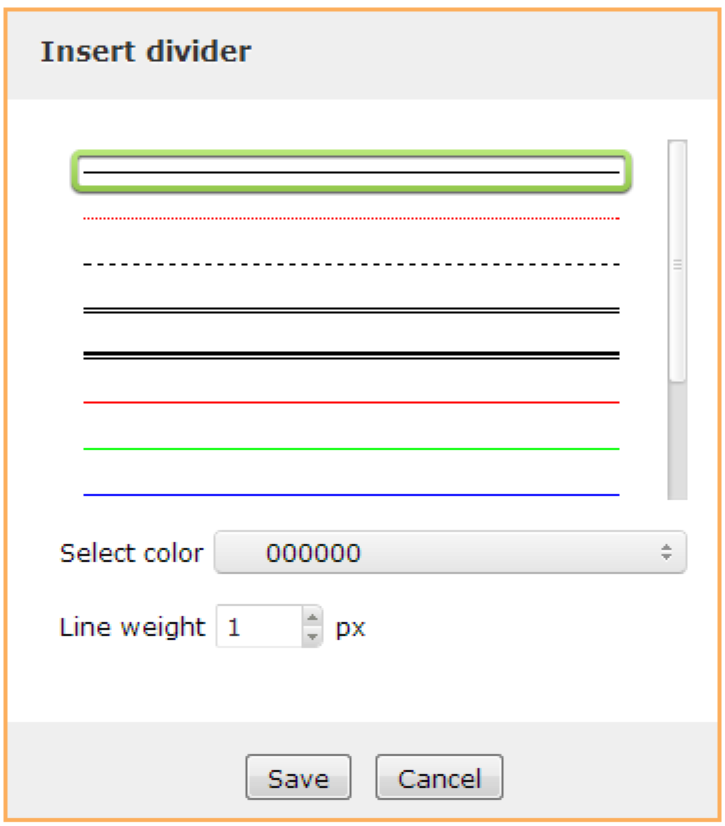
Read more/less



The ruling line will appear as a <HR> tag in the HTML code.

To insert a divider or ruling line, click within the content gadget or event description where you want the divider to appear then click the **Divider** icon within the content editor toolbar.

From the dialog that appears, select the line style you want to use, the line color, and the line weight, then click the **Save** button.



The divider should now appear within the gadget or event description.

Layering and overlapping content

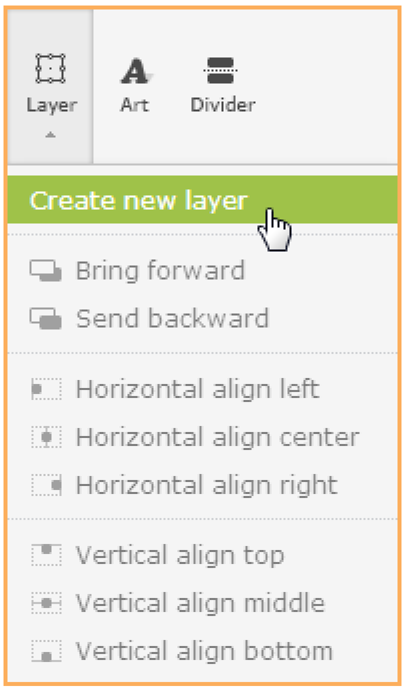
To provide precise control over the positioning of content within a content gadget, you can create a *layer*, then add the content to the selected layer. In this way, you can position the content anywhere you want, even overlapping the content with other content.

Read more/less

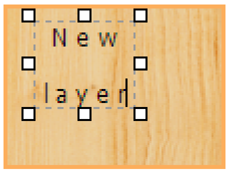
For example, you could use layers to overlap text and pictures.

Layered text is not responsive on mobile devices. If you need to position text over a graphic, consider placing the text in a content gadget and insert the graphic as the content gadget's background image. You can use the gadget margins and padding to position text relative to the graphic.

To create a layer, click within the content gadget, then click the Layer icon and select the **Create new layer** option.

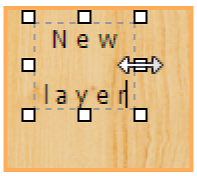


A new layer with default text ("New layer") will now appear on the gadget with selection handles around it.

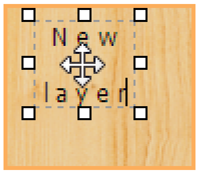


You can modify or delete the default text, and add other content to the layer. To add content to layer, position your pointer within the layer and either type your text or use the toolbar options to insert other content.

To resize the layer, drag the selection handles in or out. The side handles controlling the width, top handles controlling the height, and corner handles controlling both height and width.

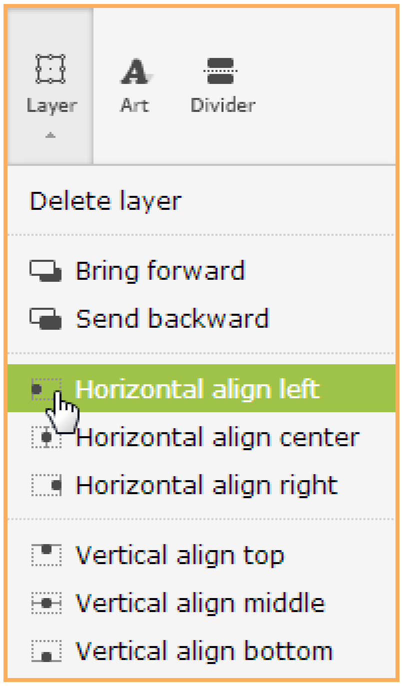


To move the layer within the gadget, position your pointer within the layer and drag it to a new location.



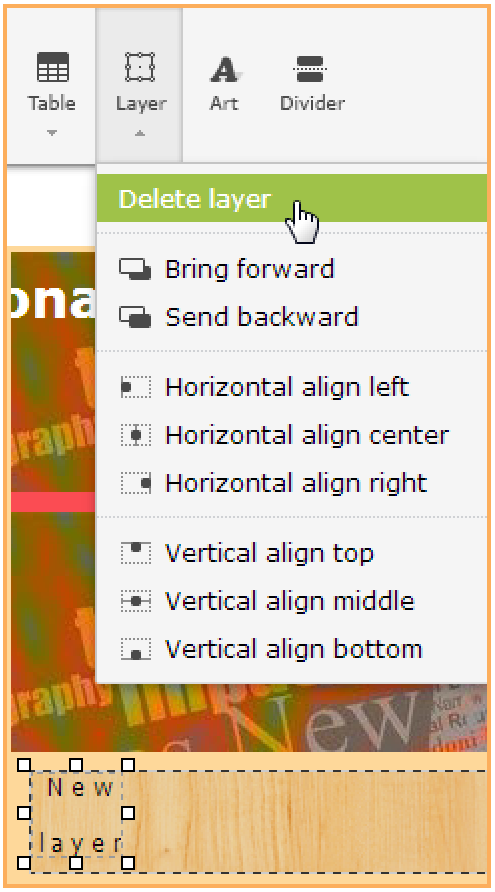
As you move the layer, the content within the layer moves as well.

You can also use other options appearing under the Layer icon to control the position of the layout.



These options allow you to align the layer horizontally or vertically to the middle or edge of the gadget, email body, or event description.

To delete a layer, select the layer – so that the selection handles appear – then click the **Delete layer** option under the Layer icon.



If you have added multiple layers, you can control the layering order by using options under the Layer icon to move the currently selected layout forward or backward within the order. For example, if the currently selected layer is partially obscured by another layer, you can move the current layer further up the stacking order by selecting the **Bring forward** option.

Pasting content from other sources

To paste content copied from another source – such as Microsoft Word, Google Docs, Apple's Pages, a website, or an email – click where you want the content to appear then click the **Paste** icon within the content editor.

Read more/less

On browsers other than Internet Explorer, you may be prompted to use keyboard shortcuts instead of the Paste icon to paste your text.

You can paste content into a content gadget, email body, event description, blog post, or forum topic.

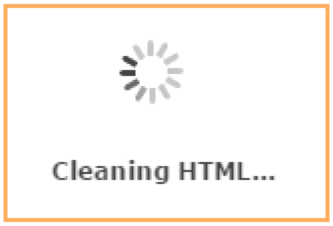
What gets pasted?

You can paste both text and graphics from other sources. When pasting formatted text, the content editor will try to preserve as much of the formatting as possible, but will discard any incompatible formatting – formatting that it cannot reproduce itself.

Read more/less

For example, some table formatting and text alignment options available in Microsoft Word may not be available in Wild Apricot's content editor, and will be discarded when pasting. For a list of supported formatting code, see Pasting cleanup rules (below).

While the editor is processing the pasted content, the following message will appear:



Whether graphical images are pasted along with the text depends on the source from which you copied the content. When pasting from sources that store images using URLs – such as Google Docs, web pages, and emails – any images included in the content will get pasted. When pasting from other sources – such as Microsoft Word – images will be discarded.

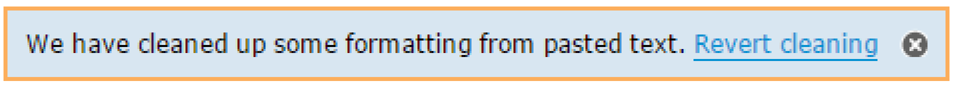
To modify the settings of the pasted images, you cannot use the Settings dialog as you would when modifying a picture inserted directly through the content editor. Instead, you must click the HTML button within the content editor and modify the HTML code.

Pasting cleanup options

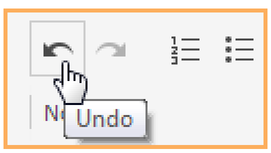
The current process for cleaning up pasted content replaces a process that retained more formatting but resulted in messier and less stable HTML code that could cause the content editor to freeze or otherwise malfunction, and result in inconsistent behavior on different browsers.

Read more/less

To accommodate those who might prefer the previous process, pasting formatted content is actually a two-step procedure, in which the content is pasted using the previous process then immediately replaced by content pasted using the new process. To take advantage of the old pasting process, you can either click the **Revert cleaning** option that appears...



...or click the Undo icon within the content editor toolbar.



Clearing formatting

To clear all character formatting – formatting applied directly to text, rather than through text styles – select the text you wanted cleared, t hen click the **Clear formatting** icon within the content editor.

Pasting text without formatting

To completely avoid introducing formatting issues, we suggest that you paste only clean text – text without formatting. To paste text without formatting, use the Ctrl + Shift + V shortcut on Windows, and the Command + Shift + V shortcut on a Mac.

Pasting cleanup rules

The following is a list of formatting tags, attributes, and styles supported by the content editor, which are therefore retained by the new process for cleaning up incompatible formatting.

Read more/less

Supported tags

The following HTML tags are supported; all other tags are removed.

P	UL	TH	EM

H1	OL	TD	I
H2	LI	A	U
H3	TABLE	IMG	S
H4	THEAD	BR	STRIKE
H5	TBODY	SPAN	SUP
H6	TFOOT	STRONG	SUB
BLOCKQUOTE	TR	B	FONT

Supported attributes

The following combinations of attribute, tag, and value are supported; all other combinations are removed.

Attribute	Tags	Value	Notes
face	FONT	Any	
color	FONT	#, A-F and 0-9 or color name	
align	P, H1-H6, TD	left, center, right, justify	
align	IMG	left, right	
valign	TD	top, middle, bottom	
width	IMG, TABLE, TH, TD	Digits and can be px or % at the end of the line	
height	IMG, TABLE, TH, TD	Digits and can be px or % at the end of the line	
alt	IMG	Any	
title	IMG, A	Any	
src	IMG	Any	
href	A	Any	
name	A	Any	
border	IMG, TABLE	Digits and can be px at the end of the line	For table converted to style border on tags TABLE and TH/TD
bordercolor	TABLE	#, A-F and 0-9 or color name	Converted to style border on tags TABLE and TH/TD
cellspacing	TABLE	Digits and can be px at the end of the line	
cellpadding	TABLE	Digits and can be px at the end of the line	
bgcolor	TABLE	#, A-F and 0-9 or color name	

Supported styles

The following combinations of style, tag, and value are supported; all other combinations are removed.

Rule	Tags	Value
border-width	TABLE, TH, TD	Digits and px at the end of the line
border-style	TABLE, TH, TD	solid
border-color	TABLE, TH, TD	Valid CSS color
border-collapse	TABLE	collapse
font-size	FONT	Digits and px at the end of the line
background-color	TH, TD, FONT, SPAN	Valid CSS color

Styles to tags conversion

The following combinations of CSS rule and value are converted to the following HTML tags.

Rule	Value	Tag
font-weight	bold	strong
font-style	italic	em
font-size	Digits and px/pt at the end of the line	font
color	Valid CSS color	font
font-family	Any	font
text-decoration	underline	u
text-decoration	line-through	strike
vertical-align	sub	sub
vertical-align	super	sup

Other rules

- Empty occurrences of P, H1, H2, H3, H4, H5, H6, BLOCKQUOTE, A, SPAN, STRONG, B, EM, I, U, S, STRIKE, SUP, SUB, and FONT tags will be removed.
- Multiple nested tags FONT will be merged into one.

Inserting and viewing code

You can insert custom HTML or JavaScript into a content gadget, email, email template, or event description. You can also insert custom HTML or JavaScript as a separate custom HTML gadget. You might want to insert code to embed an audio or video clip, or to embed a third-party widget from Google or Twitter.

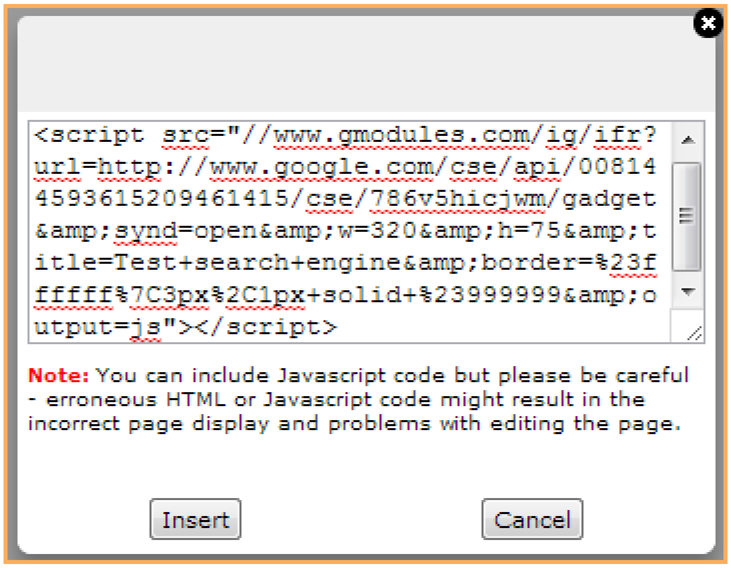
As well, you can display the HTML for any content gadget, email, or event description, and modify it as you wish. You can also add JavaScript code and apply it to all the pages on your site. For more information, see Inserting and modifying HTML or JavaScript .

Read more/less

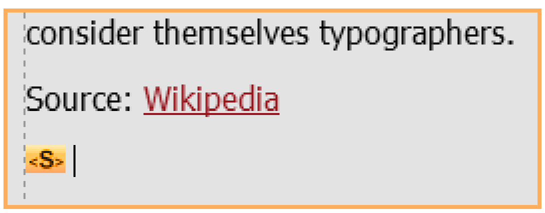
Inserting custom HTML or JavaScript

To insert HTML or JavaScript code, click within the content gadget, email body, or event description where you want to insert your code then click the **S (Snippet)** button within the toolbar.

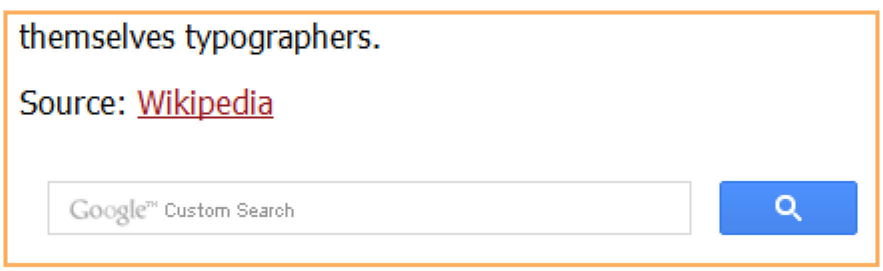
Within the code box, enter the HTML or JavaScript code.



After you save your changes, the element to be displayed by the code may be represented in edit mode by a snippet icon.

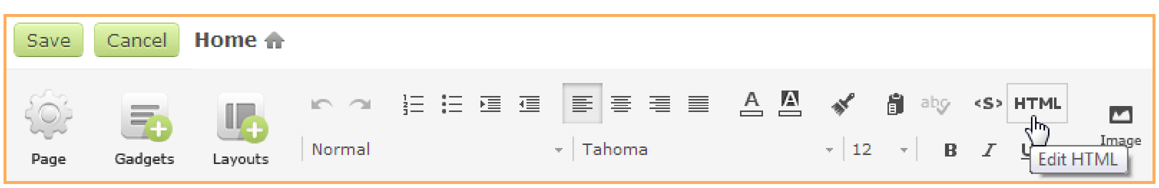


Once you switch to public view, the icon will be replaced by whatever your code is meant to display (in this case, a Google search bar).



Viewing and modifying the HTML code

If you want to view or modify the HTML code for a content gadget, page template, email, email template, or event description, click within the content gadget, email body, or event description then click the **HTML** icon within the toolbar.



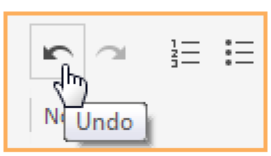
On the dialog that appears, you adjust the code then click **Save** to save your changes.

You can insert JavaScript code and Iframes but not form tags. For information on inserting custom HTML forms, click here.

Undoing and redoing changes

You can undo and redo up to 10 of your most recent editing actions.

To undo your most recent editing action, click the **Undo** icon within the content editor toolbar.



After undoing an editing action, you can redo the action by click the **Redo** icon within the toolbar.

You can undo and redo actions only within the editing session for the current gadget. The moment you shift focus from the current gadget to another gadget, the editing session for the current gadget ends.

You can also restore the previous version of a page. For more information, see Version history.

On this page:

- Displaying the content editor

- Adding and formatting text
- Adding ArtText
- Inserting pictures
- Inserting links
- Inserting documents and files
- Inserting tables
- Inserting ruling lines
- Layering and overlapping content
- Pasting content from other sources
- Inserting and viewing code
- Undoing and redoing changes

Expand all sections

Adding and formatting text

Adding and formatting text

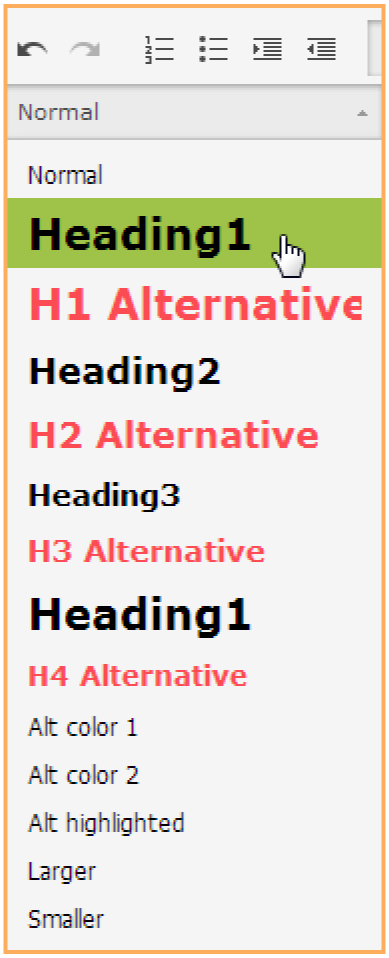
To add text while editing a content gadget, email, or event description, click where you want the text to appear then start typing. If you want to use a layer to control the positioning of the text, click within the layer before you start typing.

You can set text attributes, copy and paste text and paragraph styles, and control paragraph formatting.

Setting text attributes

To control text attributes, such as typeface, point size, and color, select the text you want to format then click the appropriate option within the toolbar. You can set the text attributes individually or select a predefined paragraph style from the style drop-down list.

Read more/less



Paragraph styles not only save you the trouble of selecting multiple text attributes individually, but they also promote consistency since the same paragraph styles are available throughout your site. Paragraph styles are theme-specific and can be modified from the Color and Styles screen. Any changes you make to paragraph styles there will be immediately applied to your entire site.

When you apply a paragraph style, it will be applied to the entire paragraph, not just the selected text. If you apply text attributes locally – using toolbar options other than text styles – the attributes will be applied to the selected text only.

> Applying a paragraph style will not override local text formatting – the formatting that is applied to selected text. For example, if you format a word within a paragraph to appear red, then applying a paragraph style to the paragraph will not change the color of that word.

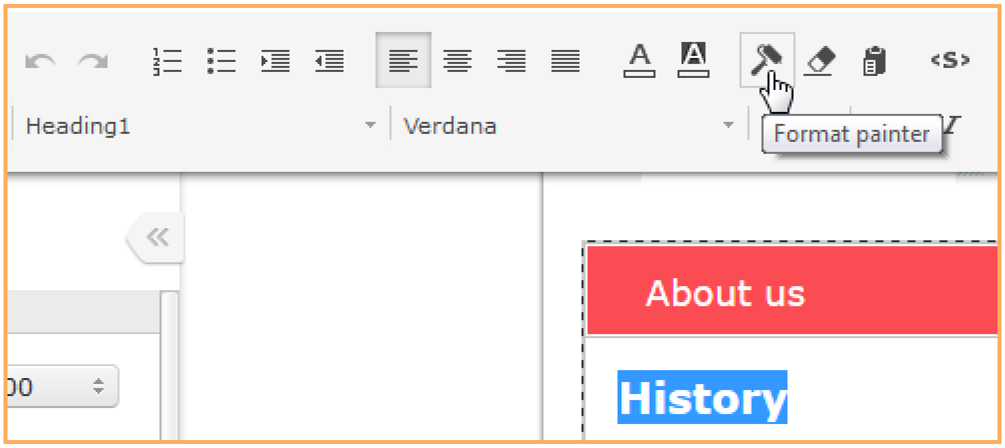
Copying text styles and text attributes

You can copy text styles and text attributes from one chunk of text to another chunk of text or to an entire paragraph. Depending on how the original chunk of text was formatted and how you select the text to be formatted, you can copy the style of the text – e.g. Heading 1 – or just its attributes – e.g. 12 point bold Verdana.

Read more/less

> You can only copy text styles and text attributes within the same content gadget, email, or event description.

To copy formatting from a chunk of text, select some or all of the text, click the **Format painter** icon within the content editor toolbar.



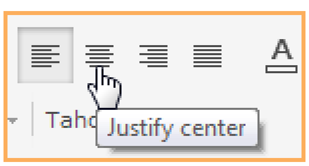
To apply the copied formatting to an entire paragraph, click within the paragraph without selecting any of its text. If the text you copied the formatting from had text styles applied, then the style will be applied to the paragraph. If the original text used localized or inline formatting rather than text styles, then its text attributes will be applied to the paragraph.

To apply the copied formatting to selected text only, select the text you want the formatting to be applied to. The attributes of the original text will be applied to the selected text as inline formatting, regardless of whether the original text was formatted using text styles or inline formatting.

Controlling paragraph formatting

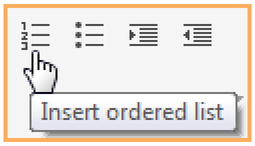
By default, text will appear in the upper left corner. Using the formatting options appearing on the toolbar, you can control the alignment of the text.

Read more/less



You can separately control the positioning of each paragraph within the gadget, email body, or event description.

You can also apply other paragraph formatting such as bullets, numbering, and indenting.

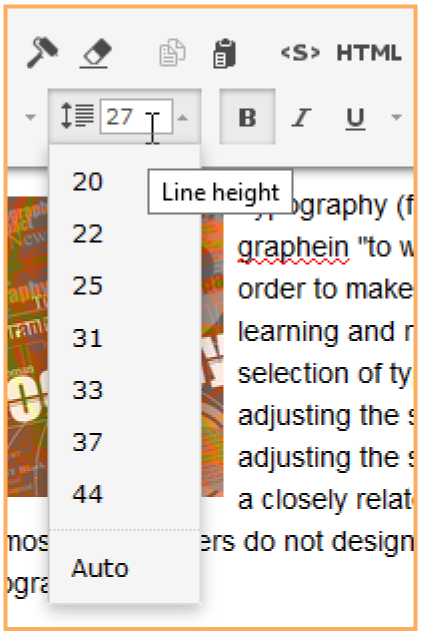


Line spacing

When editing site pages, email, and event descriptions, you cannot control paragraph spacing – the amount of vertical space between paragraphs – but you can control line height or line spacing (aka leading) – the vertical space between lines within a paragraph. You can set the line height separately for each paragraph, or change the line height for multiple paragraphs.

Read more/less

To set the line height for a single paragraph, click anywhere within the paragraph, then click the line height icon in the toolbar.



From the menu that appears, you can choose a height (in pixels), or type the height you want to apply. If you select the **Auto** option, the default line height will be applied.

To control the line height for multiple paragraphs, select portions of the paragraphs before clicking the line height icon.

Paragraph breaks and line breaks

When editing site pages, email, and event descriptions, you cannot control paragraph spacing – the amount of vertical space between paragraphs. You can, however, use keyboard combinations to insert either a paragraph break or a line break.

Read more/less

The different key combinations depend on which browser you are using, and whether your cursor is currently located within an existing paragraph.

To add a paragraph break, press the **Enter** key. To add a line break, hold down the **Shift** key and press the **Enter** key (except on Safari).

In your page's HTML code, a paragraph will appear as:

<p> .... paragraph text ... </p>

A line break will appear as:

For advanced control of spacing, you can customize the CSS code.

Pasting text from other sources

To paste text copied from another source – such as Microsoft Word, Google Docs, Apple's Pages, a website, or an email – click where you want the text to appear then click the **Paste** icon within the content editor.

Read more/less

On browsers other than Internet Explorer, you may be prompted to use keyboard shortcuts instead of the Paste icon to paste your text.

When pasting formatted text, the content editor will try to preserve as much of the formatting as possible, but will discard any incompatible formatting – formatting that it cannot reproduce itself. For more information, see Pasting content from other sources.

To completely avoid introducing formatting issues, we recommend that you paste only clean text – text without formatting. To paste text without formatting, use the Ctrl + Shift + V shortcut on Windows, and the Command + Shift + V shortcut on a Mac.

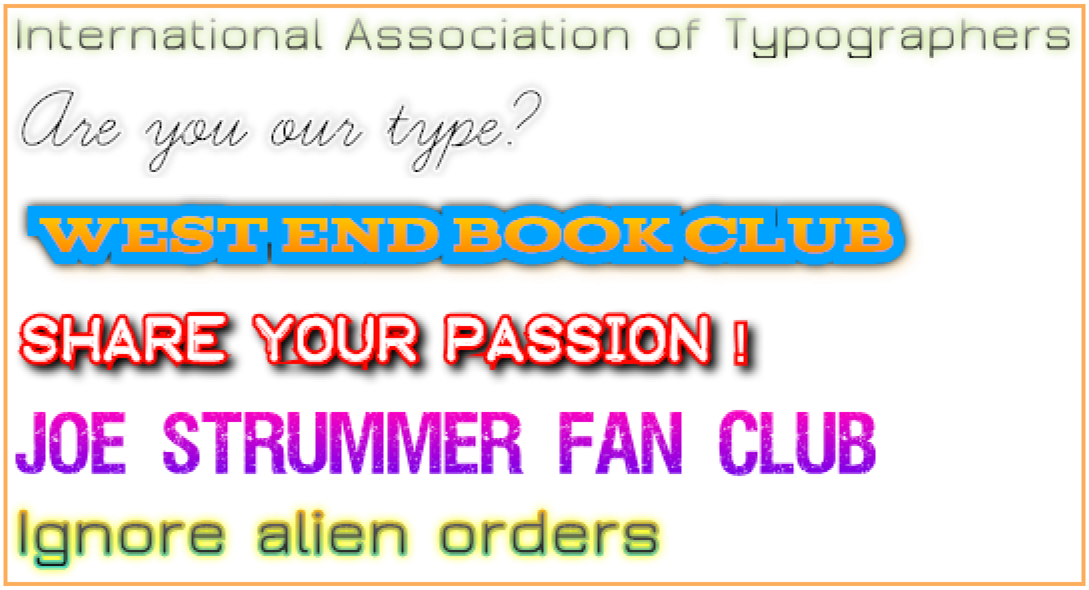
Clearing formatting

To clear all character formatting – formatting applied directly to text, rather than through text styles – select the text you wanted cleared, then click the **Clear formatting** icon within the content editor.

Adding ArtText

ArtText allows you to create fancy looking text with special effects like 3D and drop shadows. You can use ArtText to produce exciting and colorful headings for your site header, site pages, emails, and event descriptions.

Read more/less

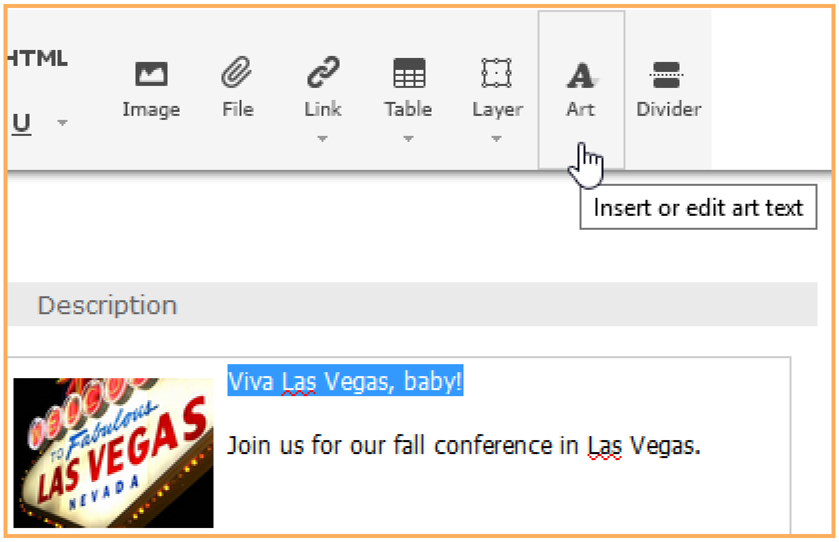


When you create a piece of ArtText, you can choose from a variety of fonts, styles, and colors. When you save it, an image file is generated containing the text and style that you have chosen. This way, you can be sure that the heading you have created will be the same for every visitor to your site no matter what kind of computer or browser they are using.

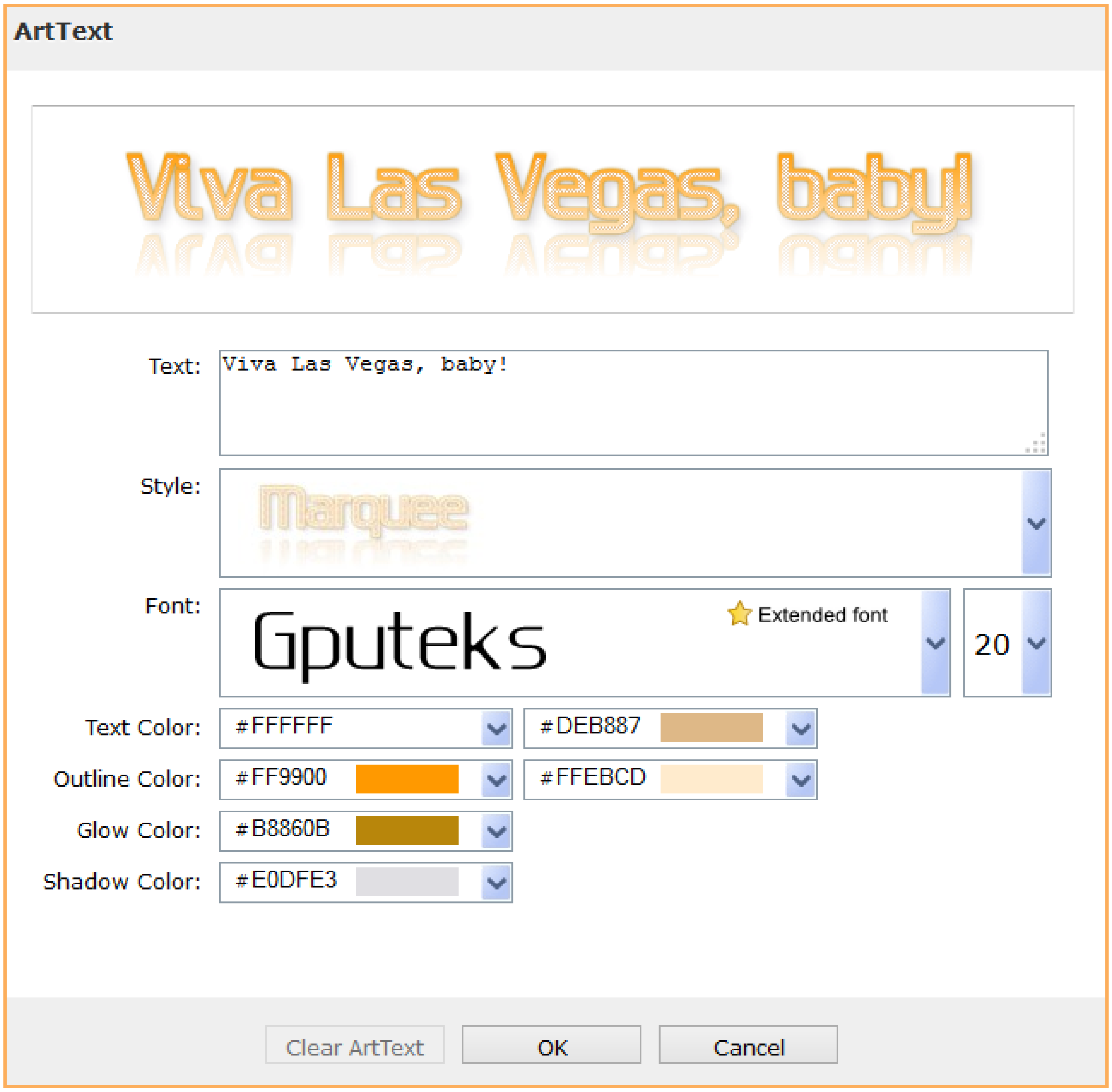
You can add ArtText to a content gadget or event description.

To add ArtText, follow these steps:

1. Either select existing text to use as the basis for the ArtText or wait to enter your text in a subsequent step.
2. Click the ArtText icon within the content editor toolbar.



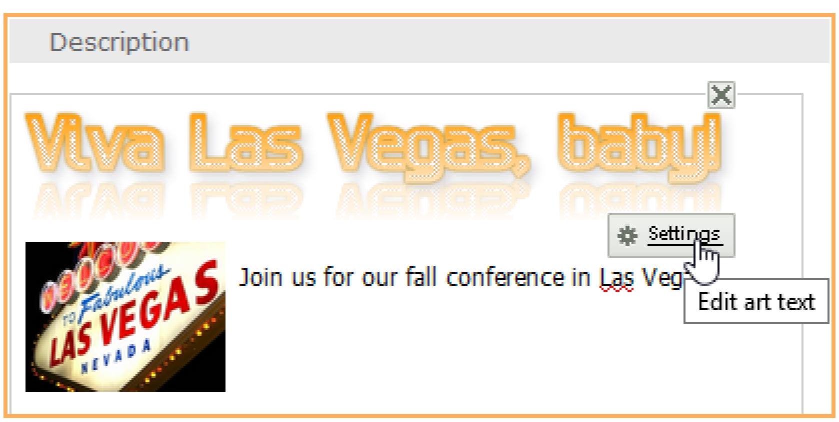
3. In the ArtText dialog that appears, you enter your text if you hadn't done so before selecting the ArtText option.
4. You can choose any of the predefined ArtText styles from the **Style** drop-down, or individually select the font, point size, text color(s), and effect color(s). A preview of your ArtText design appears at the top of the dialog.



5. Once you've modified the ArtText to your satisfaction, click the **OK** button.

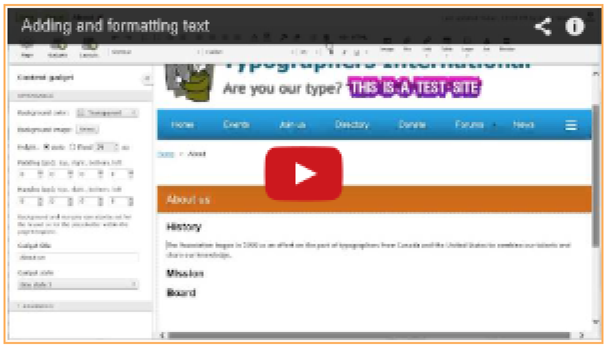
Your plain text will now be replaced with an image of the stylized text you just created.

To modify existing ArtText, position your pointer over the ArtText, then click the **Settings** option in the bottom right corner.



The ArtText dialog will appear again, allowing you to make changes to your design.

To clear the ArtText so that the text returns to its unformatted state, click the **Clear ArtText** button within the ArtText dialog.



Video: Adding and formatting text 6:31

On this page:

Expand all sections

Overriding theme capitalization

Overriding theme capitalization

Some Wild Apricot website themes force menus options, blog titles, or other elements to display all upper case text, regardless of how the text was entered. Using CSS code, you can override theme capitalization and control yourself how the text is displayed. You can choose to display the text using one of the following options:

Option	Effect
capitalize	The first letter of every word will be capitalized
none	The text will appear as entered
lowercase	All text will be displayed lower case
uppercase	All text will be displayed upper case

To override theme capitalization, you add the required code to the CSS customization screen. See the sections below for the required code.

Changing capitalization for blog post titles

To change the capitalization of blog post titles, copy and paste the following code to the CSS customization screen:

Read more/less

```
.WaGadgetBlog ul.boxesList li.boxesListItem .boxHeaderOuterContainer
h4.boxHeaderTitle a{
text-transform: capitalize;
}
```

where the *capitalize* option can be replaced by *none*, *lowercase*, or *uppercase*. See the table at the top of this topic for a description of each option.

Changing capitalization for parent menu items

To change the capitalization of parent menu items – the top-level items – on a horizontal menu gadget, copy and paste the following code to the CSS customization screen:

Read more/less

```
.WaGadgetMenuHorizontal .menuInner ul.firstLevel > li > .item > a{
text-transform: capitalize;
}
```

where the *capitalize* option can be replaced by *none*, *lowercase*, or *uppercase*. See the table at the top of this topic for a description of each option.

Changing capitalization for child menu items

To change the capitalization of child menu items – items below the top-level menu items – on a horizontal menu gadget, copy and paste the following code to the CSS customization screen:

Read more/less

```
.WaGadgetMenuHorizontal .menuInner ul ul li > .item > a{
text-transform: capitalize;
}
```

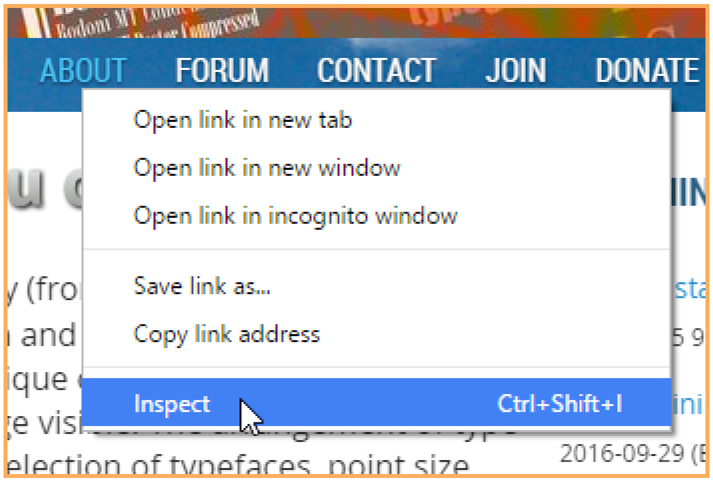
where the *capitalize* option can be replaced by *none*, *lowercase*, or *uppercase*. See the table at the top of this topic for a description of each option.

Changing capitalization for other elements

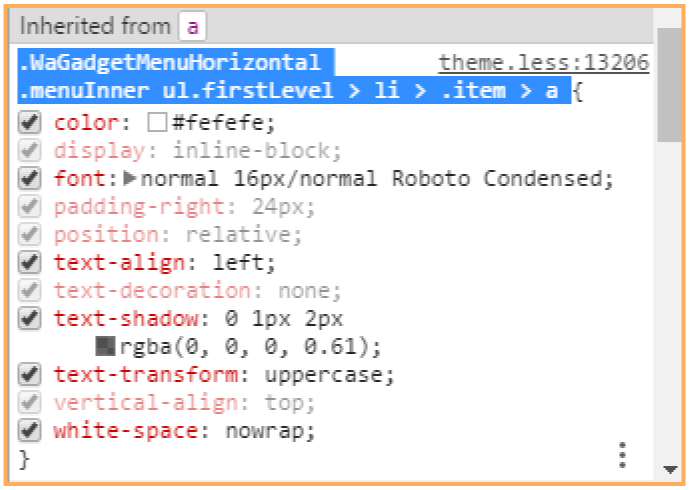
To change the capitalization of other theme elements, you can use the same approach. Within the code, you need to identify the element to be customized. In the examples above, the element is identified to the left of the left curly bracket { .

Read more/less

To figure out the name of the element you want to customize, you can use the **Inspect** option that's available on all modern browsers. To use this option, right click over the component you want to change and select the **Inspect** option.



In the window that appears, the element should appear followed by a number of formatting options.



The code you need to identify the element should appear just to the left of the left curly bracket { . In the screen clip above, we've highlighted the code you need to identify the element in this case.

After you've copied the identifying code, in this case...

```
.WaGadgetMenuHorizontal .menuInner ul.firstLevel > li > .item > a
```

...you insert it ahead of the code used to control the capitalization, which appears as...

```
{
text-transform: capitalize;
}
```

...to form the final code that you add to the CSS customization screen:

```
.WaGadgetMenuHorizontal .menuInner ul.firstLevel > li > .item > a{
text-transform: capitalize;
}
```

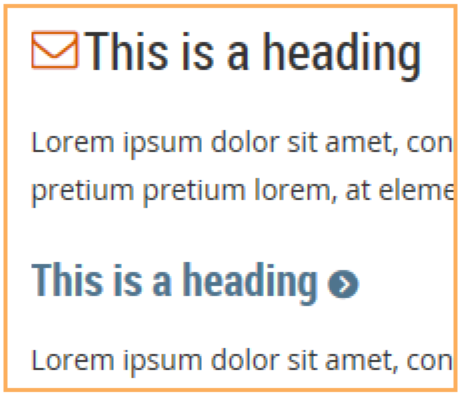
On this page:

Expand all sections

Using Font Awesome iconic fonts

Using Font Awesome iconic fonts

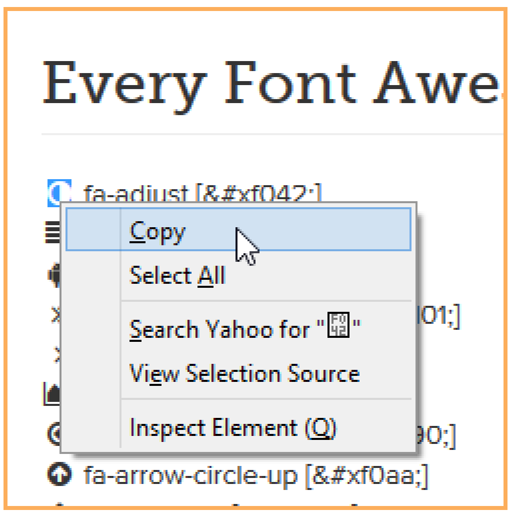
Many of Wild Apricot's website themes include the Font Awesome iconic font, which you can use to add icons to content gadgets. You can change the color and size of the icons as you would any other text.



Currently, Font Awesome fonts are supported in Building Blocks, Clean Lines, Dark Impact, Fiesta, Firma, Homestead, Kaleidoscope, Showcase, Skyline, Terra, Tinted Tiles, Treehouse, and White Space themes.

To copy and paste a Font Awesome icon, follow these steps:

1. Go to the online Font Awesome cheatsheet.
2. Select the icon you want to copy as you would select any text character.
3. Copy the icon (using keyboard shortcuts or by right clicking and select the **Copy** option).



4. Begin editing your content gadget and paste the copied icon.

Adding more font options

Adding more font options

Using theme overrides, you can make additional fonts available within the content editor. The additional fonts, available from Google, are web open font format (WOFF) fonts.

The additional fonts will **not** be available from the Colors and styles screen.

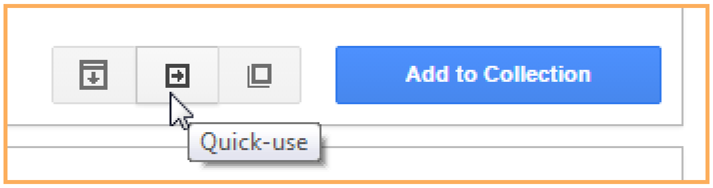
Getting the font code

Before you can apply the theme override, you need to get the font code from the Google Fonts website. To get the code for the fonts you want to add, follow these steps:

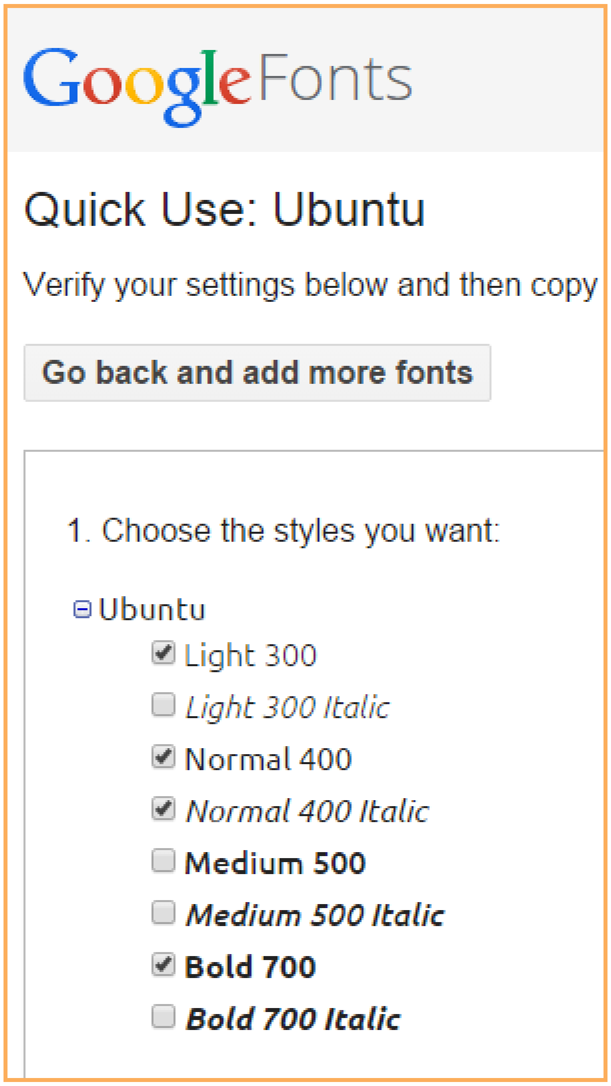
Read more/less

1. O pen the Google fonts site using the Microsoft Edge browser in Windows or the Safari browser on a Mac. This will force Google to provide you with the more universal WOFF font format rather than the WOFF2 format. If your users use only Chrome or Firefox browsers, you can open the site using a Chrome and Firefox browser, which will provide you with WOFF2 format, which is less universal but faster to load.

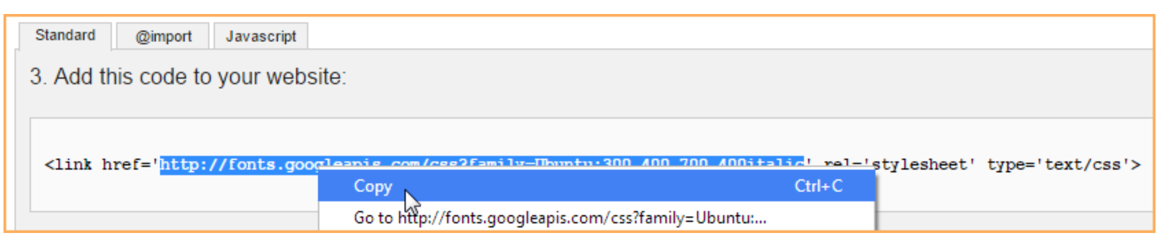
2. Choose or search for the typeface you want to use. In the examples that follow, we will be using Ubuntu.
3. Click the Quick-use icon for that typeface.



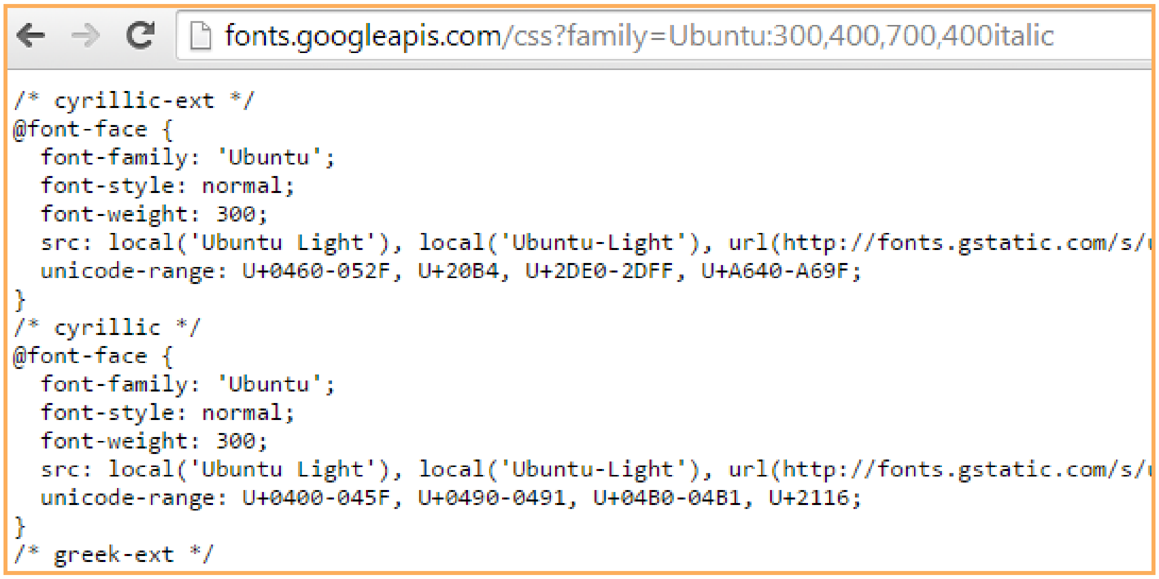
4. On the screen that appears, click the checkbox for each font weight and font style you want to add. In the example below, we have chosen Light, Normal, Normal Italic, and Bold.



5. Scroll down to the section labelled **3. Add this code to your website**, and copy **just** the URL that appears within the *href* attribu te, as shown below.



6. Open a new tab in your browser and paste the URL you just copied into the browser's address tab and press Enter. You'll see a page that begins like this:


fonts.googleapis.com/css?family=Ubuntu:300,400,700,400italic

```
/* cyrillic-ext */
@font-face {
  font-family: 'Ubuntu';
  font-style: normal;
  font-weight: 300;
  src: local('Ubuntu Light'), local('Ubuntu-Light'), url(http://fonts.gstatic.com/s/u
  unicode-range: U+0460-052F, U+20B4, U+2DE0-2DFF, U+A640-A69F;
}
/* cyrillic */
@font-face {
  font-family: 'Ubuntu';
  font-style: normal;
  font-weight: 300;
  src: local('Ubuntu Light'), local('Ubuntu-Light'), url(http://fonts.gstatic.com/s/u
  unicode-range: U+0400-045F, U+0490-0491, U+04B0-04B1, U+2116;
}
/* greek-ext */
```

This page displays font codes for each font style you choose, in 3 different character sets: Latin (for English characters), Greek, and Cyrillic.

7. Copy the font codes for the character set(s) you want to use and paste them in a text editor. In this case, we are copying only the Latin codes – the ones that begin with **/* latin */**.
8. Using the text editor, replace all instances of **http://** in the copied font code with **//**. This ensures that the code will function in both encrypted (https) and non-encrypted (http) modes.
9. Remove any lines that begin with **unicode-range** and include **+** signs, such as **U+0460-052F, U+20B4, U+2DE0-2DFF, U+A640-A69F;**.

You now have the font code that you will use in the theme override described below.

In our Ubuntu example, we end up with the following code:

```
/* latin-ext */
@font-face {
  font-family: 'Ubuntu';
  font-style: normal;
  font-weight: 300;
  src: local('Ubuntu Light'), local('Ubuntu-Light'),
url(//fonts.gstatic.com/s/ubuntu/v7/WtcvfJHWXKxx4x0kuS1koRJtnKITppOI_IvcXXDNrsc.w
off2) format('woff2');
}
/* latin */
@font-face {
  font-family: 'Ubuntu';
  font-style: normal;
  font-weight: 300;
  src: local('Ubuntu Light'), local('Ubuntu-Light'),
url(//fonts.gstatic.com/s/ubuntu/v7/_aijTyevf54tkVDLy-dlnFtXRa8TVwTICgirnJhmVJw.w
off2) format('woff2');
}
/* latin-ext */
@font-face {
  font-family: 'Ubuntu';
  font-style: normal;
  font-weight: 400;
  src: local('Ubuntu'),
url(//fonts.gstatic.com/s/ubuntu/v7/Wu5Iuha-XnKDBvqRwQzAG_esZW2xOQ-xsNqO47m55DA.w
```

```
off2) format('woff2');
}
/* latin */
@font-face {
  font-family: 'Ubuntu';
  font-style: normal;
  font-weight: 400;
  src: local('Ubuntu'),
url(//fonts.gstatic.com/s/ubuntu/v7/sDGTilo5QRsfWu6Yc11AXg.woff2)
format('woff2');
}
/* latin-ext */
@font-face {
  font-family: 'Ubuntu';
  font-style: normal;
  font-weight: 700;
  src: local('Ubuntu Bold'), local('Ubuntu-Bold'),
url(//fonts.gstatic.com/s/ubuntu/v7/nsLtvfQoT-rVwGTHHnkeJhJtnKITppOI_IvcXXDNrsc.w
off2) format('woff2');
}
/* latin */
@font-face {
  font-family: 'Ubuntu';
  font-style: normal;
  font-weight: 700;
  src: local('Ubuntu Bold'), local('Ubuntu-Bold'),
url(//fonts.gstatic.com/s/ubuntu/v7/0ihfXUL2emPh0ROJezvraFtXRa8TVwTICgirnJhmVJw.w
off2) format('woff2');
}
/* latin-ext */
@font-face {
  font-family: 'Ubuntu';
  font-style: italic;
  font-weight: 400;
  src: local('Ubuntu Italic'), local('Ubuntu-Italic'),
url(//fonts.gstatic.com/s/ubuntu/v7/IZYv9ktJI5s8uIr0hWnbSBTbgVql8nDJpwnrE27mub0.w
off2) format('woff2');
}
/* latin */
@font-face {
  font-family: 'Ubuntu';
  font-style: italic;
  font-weight: 400;
  src: local('Ubuntu Italic'), local('Ubuntu-Italic'),
```

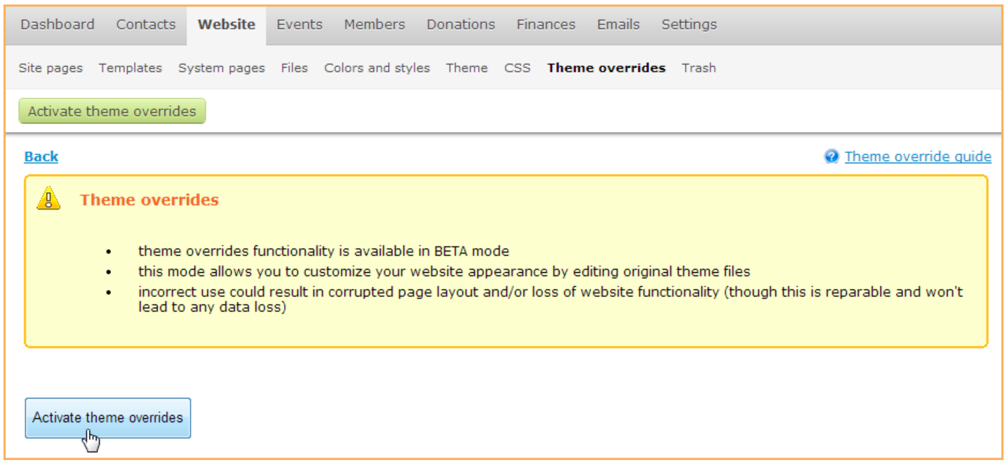
```
url(//fonts.gstatic.com/s/ubuntu/v7/WB6rgjTg_oRfj6mlXZJbb_esZW2xOQ-xsNqO47m55DA.woff2) format('woff2');
}
```

Applying the theme overrides

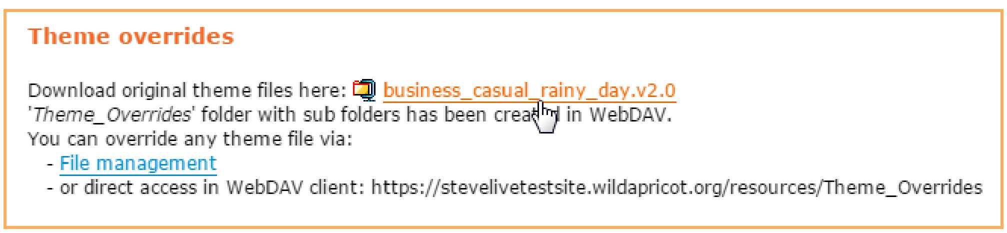
To apply the theme override using the copied font code, follow these steps:

Read more/less

1. Under the **Website** menu, click the **Theme overrides** option.
2. From the **Theme overrides** screen, click the **Activate theme overrides** button.



3. Click the link to download the theme files.



   You can download the theme files (stored in a zip file) to any location you choose.
4. Take note of the theme version number included in the zip file name (e.g. business_casual_rainy_day.v2.0.zip = Version 2.0).
5. Unzip the theme files to a location of your choice on your computer or network.
6. Within the root folder of your unzipped theme files, open the **FontStyles.cfg** file using any text editor.
7. Add a <Style> entry for the new font, using the font family you specified within the font code you assembled using the instructions in the Getting the font code section (above). In our Ubuntu example, we would add the following line:

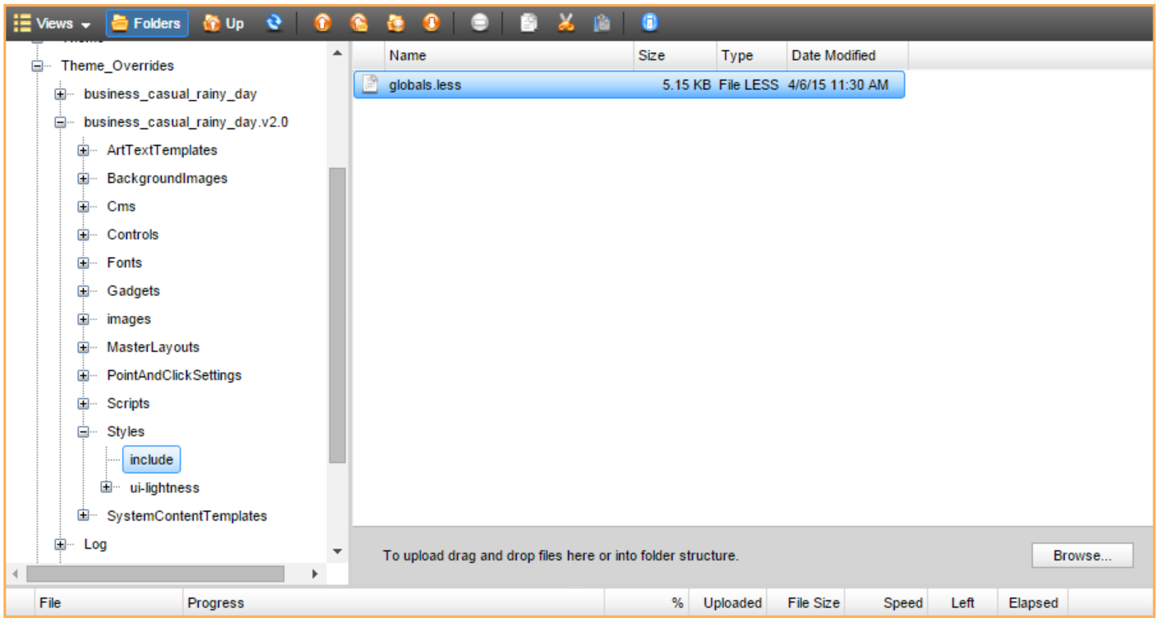
```
<Style Name="Ubuntu" Font="Ubuntu" />
```

8. Open the following file within a text editor, depending on which theme version you are using:

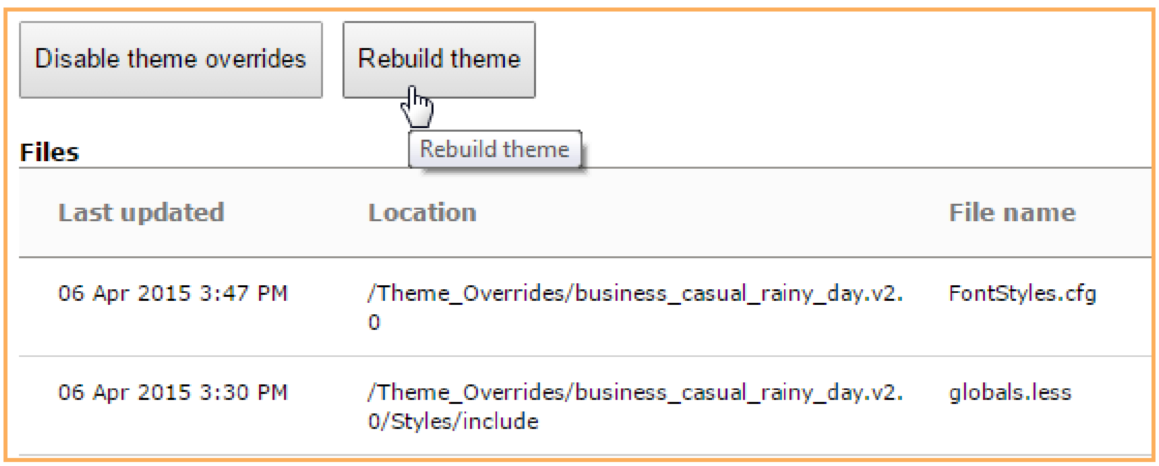
Version #	Open...
1.0	/Styles/theme.css
2.0	/Styles/include/globals. less
3.0	/Gadgets/shared.typography.less

9. Copy the font code you assembled using the instructions in the Getting the font code section (above).

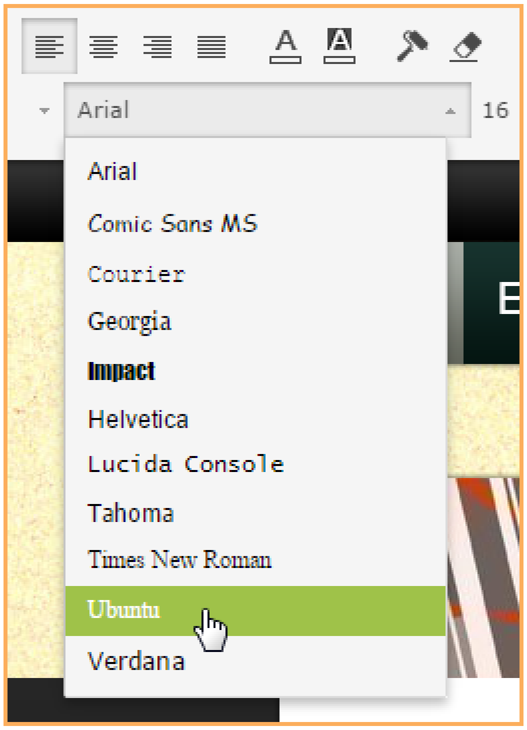
10. Paste the code at the bottom of the file and save your changes.
11. From the File management screen in Wild Apricot, or using WebDAV , upload the modified files to the corresponding theme folders on your site.



12. Go to the **Theme overrides** screen and click the **Rebuild theme** button.



The font family you added should now appear within the font menu on the content editor toolbar.



You may need to log off and back on again to view the new option.

On this page:

- Getting the font code
- Applying the theme overrides

Expand all sections

ArtText

ArtText

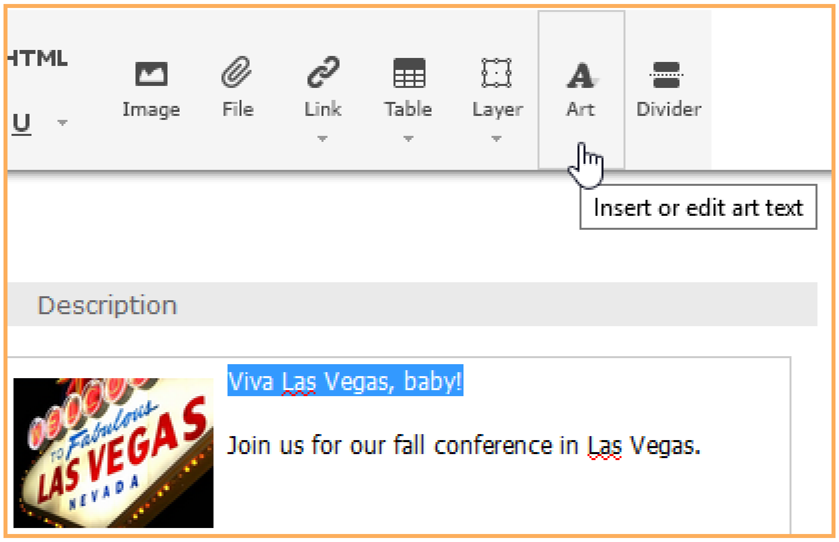
ArtText allows you to create fancy looking text with special effects like 3D and drop shadows. You can use ArtText to produce exciting and colorful headings for your site header, site pages, and event descriptions.

When you create a piece of ArtText, you can choose from a variety of fonts, styles, and colors. When you save it, an image file is generated containing the text and style that you have chosen. This way, you can be sure that the heading you have created will be the same for every visitor to your site no matter what kind of computer or browser they are using.

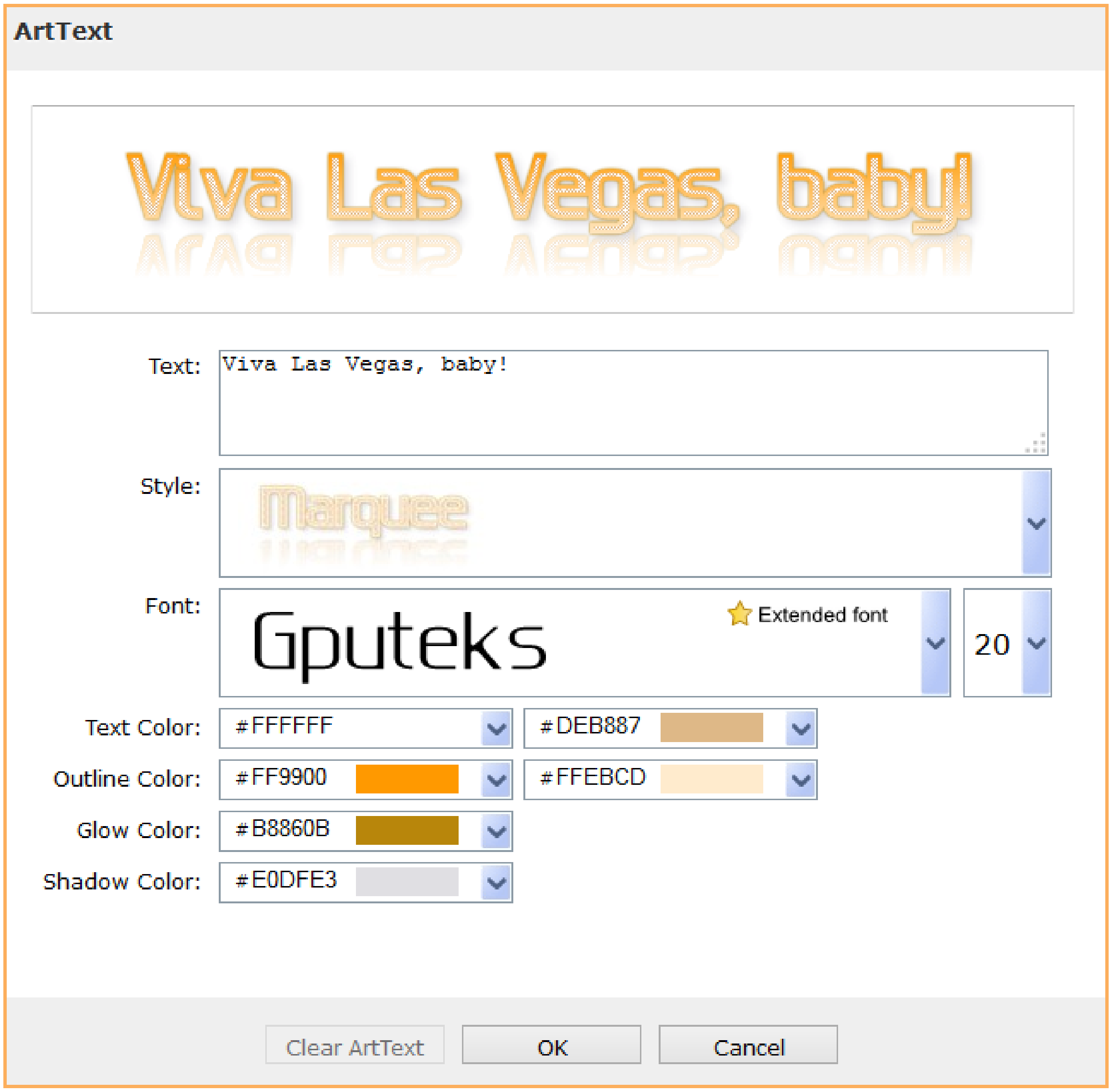
You can add ArtText to a content gadget or event description.

To add ArtText, follow these steps:

1. Either select existing text to use as the basis for the ArtText or wait to enter your text in a subsequent step.
2. Click the ArtText icon within the content editor toolbar.



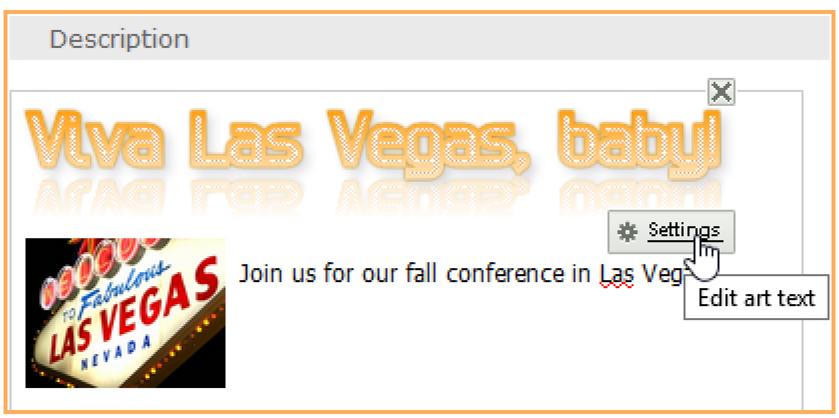
3. In the ArtText dialog that appears, you enter your text if you hadn't done so before selecting the ArtText option.
4. You can choose any of the predefined ArtText styles from the **Style** drop-down, or individually select the font, point size, text color(s), and effect color(s). A preview of your ArtText design appears at the top of the dialog.



5. Once you've modified the ArtText to your satisfaction, click the **OK** button.

Your plain text will now be replaced with an image of the stylized text you just created.

To modify existing ArtText, position your pointer over the ArtText, then click the **Settings** option in the bottom right corner.



The ArtText dialog will appear again, allowing you to make changes to your design.

To clear the ArtText so that the text returns to its unformatted state, click the **Clear ArtText** button within the ArtText dialog.

Fonts used in ArtText

Fonts used in ArtText

Fonts with extended character set

Font Name	Credits	License
ACKNOWLEDGEMENT	benweiner (http://ben-weiner.kernest.com/fonts)	SIL Open Font License (OFL)
Gputeks	gluk (http://openfontlibrary.org)	SIL Open Font License (OFL)
Goudy Bookletter 1911	chemoelectric (http://openfontlibrary.org)	Public Domain (PD)
Jura	Daniel_J (http://openfontlibrary.org)	SIL Open Font License (OFL)
Libertinage	OSP (http://openfontlibrary.org)	SIL Open Font License (OFL)
Linux Libertine	Linux Libertine community (http://linuxlibertine.sf.net)	General Public License (GPL)
Okolaks	gluk (http://openfontlibrary.org)	SIL Open Font License (OFL)
Pecita	pecita (http://openfontlibrary.org)	SIL Open Font License (OFL)
PT Sans	ParaType Ltd http://www.paratype.ru	ParaType Free Font License
Sacco-Vanzetti	Daniel_J (http://openfontlibrary.org)	SIL Open Font License (OFL)
SILKSCREEN	jkottke (http://openfontlibrary.org)	SIL Open Font License (OFL)
SPINWERAD	gluk (http://openfontlibrary.org)	SIL Open Font License (OFL)
Sportrop	gluk (http://openfontlibrary.org)	SIL Open Font License (OFL)

Temporarium	chemoelectric (http://openfontlibrary.org)	SIL Open Font License (OFL)
Travelogue	Daniel_J (http://openfontlibrary.org)	SIL Open Font License (OFL)
Wanta	gluk (http://openfontlibrary.org)	SIL Open Font License (OFL)

Latin fonts

Font Name	Author	License
Accidental Presidency	Brandon Schoeph (tepidmonkey) (http://www.fontframe.com)	Freeware
Amplitude	Brian Kent (http://www.aenigmafonts.com)	Freeware
avatar	Utopia Fonts (http://www.urbanfonts.com)	Freeware
Bazaronite	Utopia Fonts (http://www.urbanfonts.com)	Freeware
Bedizen	Brandon Schoeph (tepidmonkey) (http://www.fontframe.com)	Freeware
BEWARE	Utopia Fonts (http://www.urbanfonts.com)	Freeware
Brigadoom Wide	Brian Kent (http://www.aenigmafonts.com)	Freeware
Charybdis	Brandon Schoeph (tepidmonkey) (http://www.fontframe.com)	Freeware
COMIC ZINE	Jess Latham (http://www.bvfonts.com)	Freeware
CORPULENT CAPS	Brian Kent (http://www.aenigmafonts.com)	Freeware
CRACKED JOHNNIE	Dimitris Kolyris (pOPdOG fONTS) (http://www.dafont.com)	Freeware

Dadhand	Brandon Schoeph (tepidmonkey) (http://www.fontframe.com)	Freeware
Dael Calligraphy	Utopia Fonts (http://www.urbanfonts.com)	Freeware
Discognate	Brandon Schoeph (tepidmonkey) (http://www.fontframe.com)	Freeware
DISKO	Jess Latham (http://www.bvfonts.com)	Freeware
Dotimatrix	Brandon Schoeph (tepidmonkey) (http://www.fontframe.com)	Freeware
Dyphusion	Brian Kent (http://www.aenigmafonts.com)	Freeware
Eager Naturalist	Brandon Schoeph (tepidmonkey) (http://www.fontframe.com)	Freeware
EMBOSSING TAPE	Brian Kent (http://www.aenigmafonts.com)	Freeware
EVOL	Dimitris Kolyris (pOPdOG fONTS) (http://www.dafont.com)	Freeware
FATBOY SLIM	Brian Kent (http://www.aenigmafonts.com)	Freeware
Galaxy Monkey	Brandon Schoeph (tepidmonkey) (http://www.fontframe.com)	Freeware
Gather Gapped	Brian Kent (http://www.aenigmafonts.com)	Freeware
Giant Head	Jess Latham (http://www.bvfonts.com)	Freeware
Gothic Ultra	Jess Latham (http://www.bvfonts.com)	Freeware

Grumble	Jess Latham (http://www.bvfonts.com)	Freeware
HAPPY DAZE	Dimitris Kolyris (pOPdOG fONTS) (http://www.dafont.com)	Freeware
Harper	Utopia Fonts (http://www.urbanfonts.com)	Freeware
Hillock	Brian Kent (http://www.aenigmafonts.com)	Freeware
Hipchick	Brandon Schoeph (tepidmonkey) (http://www.fontframe.com)	Freeware
Hoffmanhand	Brandon Schoeph (tepidmonkey) (http://www.fontframe.com)	Freeware
I Hate Comic Sans	Utopia Fonts (http://www.urbanfonts.com)	Freeware
Jrhand	Brandon Schoeph (tepidmonkey) (http://www.fontframe.com)	Freeware
Ketchup Spaghetti	Brandon Schoeph (tepidmonkey) (http://www.fontframe.com)	Freeware
Kinkaid	Brian Kent (http://www.aenigmafonts.com)	Freeware
Knot	Brian Kent (http://www.aenigmafonts.com)	Freeware
Learning Curve	Jess Latham (http://www.bvfonts.com)	Freeware
Licorice Strings	Brian Kent (http://www.aenigmafonts.com)	Freeware
Little Trouble Girl	Jess Latham (http://www.bvfonts.com)	Freeware

Locked Window	Brandon Schoeph (tepidmonkey) (http://www.fontframe.com)	Freeware
Lawdawn	Brian Kent (http://www.aenigmafonts.com)	Freeware
LYNX	Brian Kent (http://www.aenigmafonts.com)	Freeware
Mad's Scrawl	Brian Kent (http://www.aenigmafonts.com)	Freeware
Monoglyceride	Brandon Schoeph (tepidmonkey) (http://www.fontframe.com)	Freeware
MY SCARS	Jess Latham (http://www.bvfonts.com)	Freeware
Mysterons	Brian Kent (http://www.aenigmafonts.com)	Freeware
NauVoo	Brandon Schoeph (tepidmonkey) (http://www.fontframe.com)	Freeware
Netherworld	Utopia Fonts (http://www.urbanfonts.com)	Freeware
Nominal	Brian Kent (http://www.aenigmafonts.com)	Freeware
Nostalgia	Brian Kent (http://www.aenigmafonts.com)	Freeware
November	Brandon Schoeph (tepidmonkey) (http://www.fontframe.com)	Freeware
ORIGAMI MOMMY	Brandon Schoeph (tepidmonkey) (http://www.fontframe.com)	Freeware
PLAIN O MATIC	Utopia Fonts (http://www.urbanfonts.com)	Freeware
Pocket Calculator	Jess Latham (http://www.bvfonts.com)	Freeware

Print Clearly	Jess Latham (http://www.bvfonts.com)	Freeware
Ptarmigan	Brandon Schoeph (tepidmonkey) (http://www.fontframe.com)	Freeware
Qhytsdakx	Brandon Schoeph (tepidmonkey) (http://www.fontframe.com)	Freeware
Rambling	Brian Kent (http://www.aenigmafonts.com)	Freeware
Rational Integer	Brandon Schoeph (tepidmonkey) (http://www.fontframe.com)	Freeware
Registry	Brian Kent (http://www.aenigmafonts.com)	Freeware
Revert	Brian Kent (http://www.aenigmafonts.com)	Freeware
Ryuker	Brian Kent (http://www.aenigmafonts.com)	Freeware
SAMBA IS DEAD	Utopia Fonts (http://www.urbanfonts.com)	Freeware
Scott	Brandon Schoeph (tepidmonkey) (http://www.fontframe.com)	Freeware
Simpleton	Brian Kent (http://www.aenigmafonts.com)	Freeware
Slang King	Dimitris Kolyris (pOPdOG fONTS) (http://www.dafont.com)	Freeware
Spin cycle	Jess Latham (http://www.bvfonts.com)	Freeware
Supersoulfighter	Utopia Fonts (http://www.urbanfonts.com)	Freeware
synthetique	Jess Latham (http://www.bvfonts.com)	Freeware

Techno Overload	Brian Kent (http://www.aenigmafonts.com)	Freeware
TOLO	Utopia Fonts (http://www.urbanfonts.com)	Freeware
Turn Table	Jess Latham (http://www.bvfonts.com)	Freeware
Unexplored Galaxies	Brian Kent (http://www.aenigmafonts.com)	Freeware
Unlearned	Brian Kent (http://www.aenigmafonts.com)	Freeware
UPHEAVAL	Brian Kent (http://www.aenigmafonts.com)	Freeware
Vantage	Brian Kent (http://www.aenigmafonts.com)	Freeware
Variance	Brian Kent (http://www.aenigmafonts.com)	Freeware
VERTICAL TUNING	Brandon Schoeph (tepidmonkey) (http://www.fontframe.com)	Freeware
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VISITOR	Brian Kent (http://www.aenigmafonts.com)	Freeware
Wager	Brian Kent (http://www.aenigmafonts.com)	Freeware
Waywards	Brian Kent (http://www.aenigmafonts.com)	Freeware
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Xipital	Brian Kent (http://www.aenigmafonts.com)	Freeware
Xtrusion	Brian Kent (http://www.aenigmafonts.com)	Freeware

Yesterday	Brian Kent (http://www.aenigmafonts.com)	Freeware
Yielding	Brian Kent (http://www.aenigmafonts.com)	Freeware
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Z WISDOM	Dimitris Kolyris (pOPdOG fONTS) (http://www.dafont.com)	Freeware
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Inserting pictures

Inserting and editing pictures

You can insert pictures into content gadgets on your site pages and page templates, and in emails, email templates, event descriptions, blog posts, and forum topics.

You can upload images files to your Wild Apricot account as part of the process of inserting a picture, or by using file management or WebDAV . Using WebDAV allows you to copy multiple files or folders at the same time.

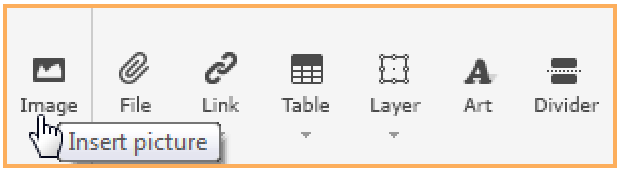
You can also add photos – stored in your Wild Apricot account or on your computer – to public photo albums. For more information, see Photo albums. If you have already uploaded pictures to photo sharing sites such as Flickr, Photobucket, or Picasa, you can embed those external photo galleries in your Wild Apricot site. For instructions, see Embedded photo galleries.

Getting started

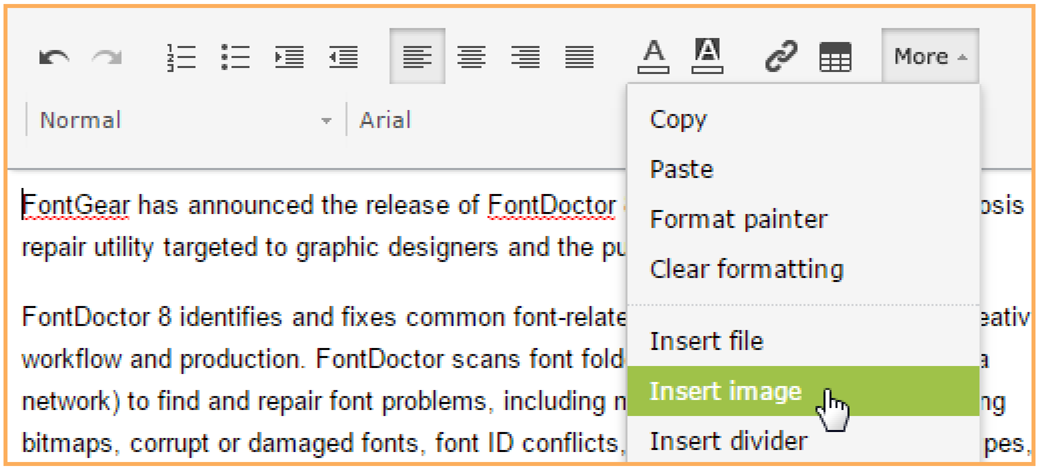
The first step in inserting a picture is to begin modifying the site page , page template , email , email template , event description, blog post, or forum topic . Next, click within the content gadget, email, event description, blog, or forum topic where you want the image to appear.

Read more/less

Now, click the **Image** icon within the content editor toolbar.



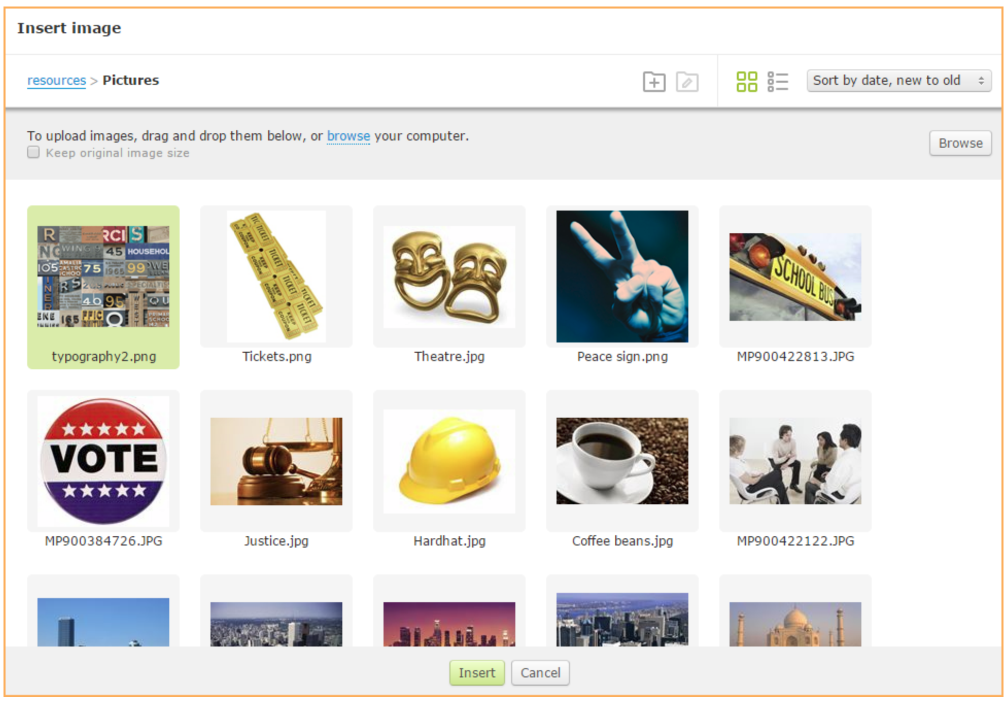
For blog posts and forum topics, administrators click the **More** menu and select the **Insert image** option.



Selecting the picture

After you click the **Image** icon while editing a site page, page template, email, email template, or event description, the **Insert image** window appears.

Read more/less



From here, you can:

- choose a picture to be inserted from the pictures already in your account, or
- upload one or more new pictures then choose one of them to be inserted.

You can navigate between folders in your account, and add, rename, or delete folders. You can switch from icons view to details view, where additional file information is displayed.

You can delete files while inserting pictures, but you cannot rename them, or move them to different folders. You can rename and move files from File management.

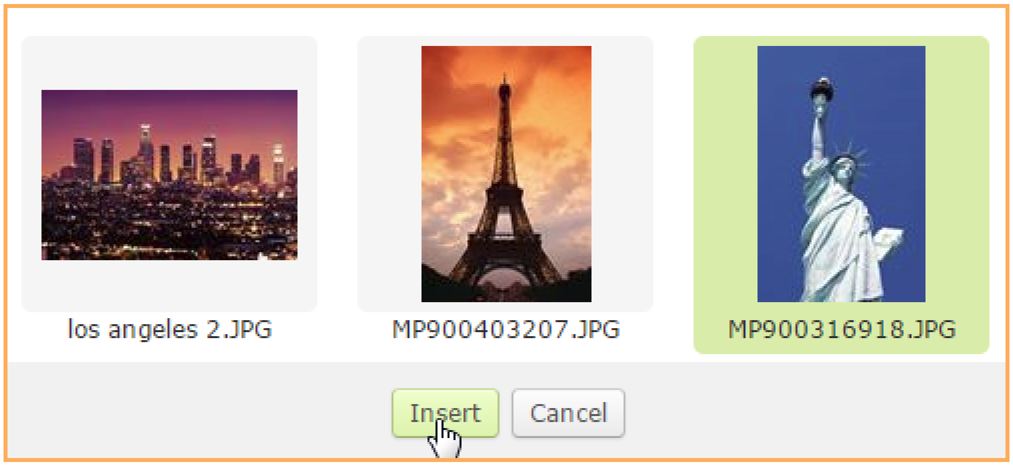
When you insert a picture, you are really inserting a link to the picture stored on your account. If you move, rename, or delete the image from your account, the image will no longer appear. Instead of uploading and inserting pictures, you can edit the HT ML code directly to display an image file stored on another website.

Selecting a picture already in your account

To select a picture already in your Wild Apricot account, follow these steps:

Read more/less

1. Select the folder containing the picture – by default, the **Pictures** folder is selected. Click the **Resources** link to move up one level within the folder hierarchy, then double click the folder you want to open. For more information, see Switching to a different folder (below).
2. Click the picture you want to insert. It will appear highlighted.
3. Click the **Insert button**.



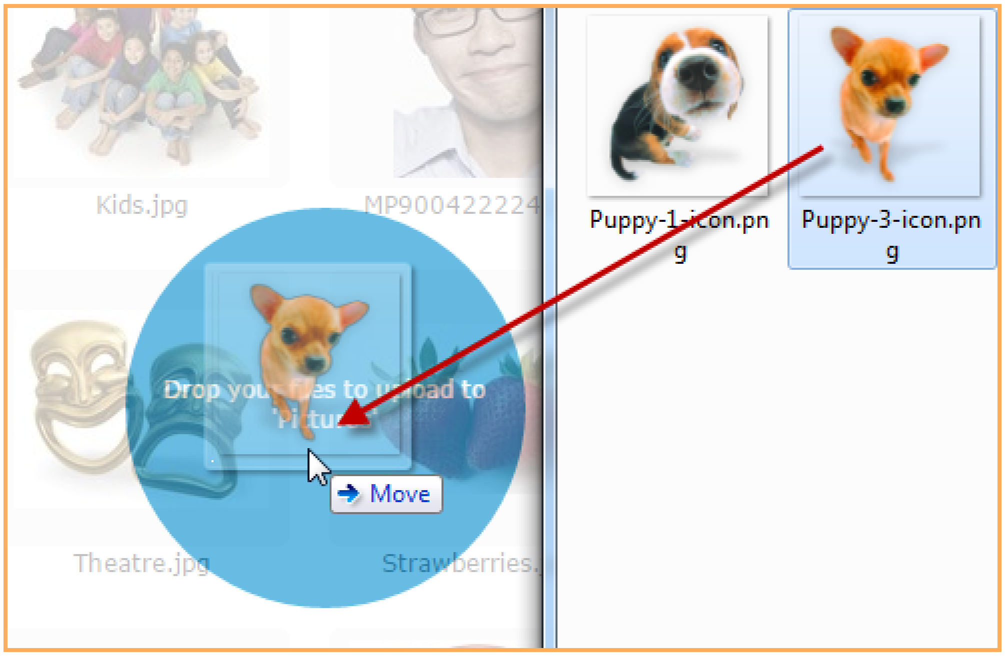
Alternatively, you could just double click the file within the **Insert image** dialog.

Uploading a new image

There are two ways you can upload a new image from the **Insert image** dialog.

Read more/less

- You can drag and drop a file from File Explorer or Finder onto the dialog.



- You can click the **Browse** button and find the file on your computer or network.

In either case, the file you choose will be added to the currently selected folder.

If you don't want the image to be resized when you upload it, check the **Keep original image size** checkbox.

If this option is unchecked, images over 1920 x 1080 pixels will be resized to this size – while maintaining image proportions. Images under these dimensions will be uploaded at their normal size.

> When uploading a PNG image with a transparent background that has a dimension larger than 1920 x 1080, if you uncheck this option – allowing the image to be resized – the transparency will be lost, and the image will appear with a white background.

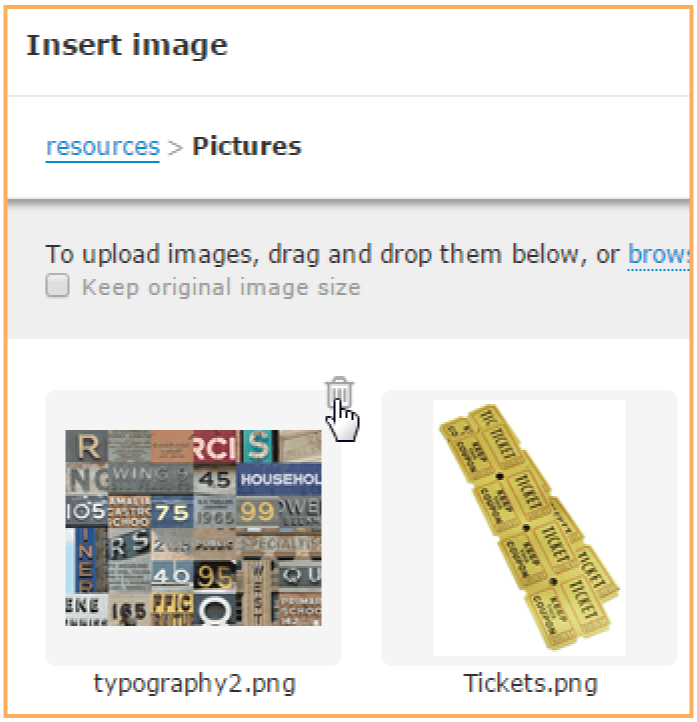
You can upload any of the file types supported by Wild Apricot. The maximum size of each file is 100 MB. Your overall file storage limit depends on your billing plan.

After uploading the file, the file will be selected, and you can insert it by clicking the **Insert** button.

Deleting an image file

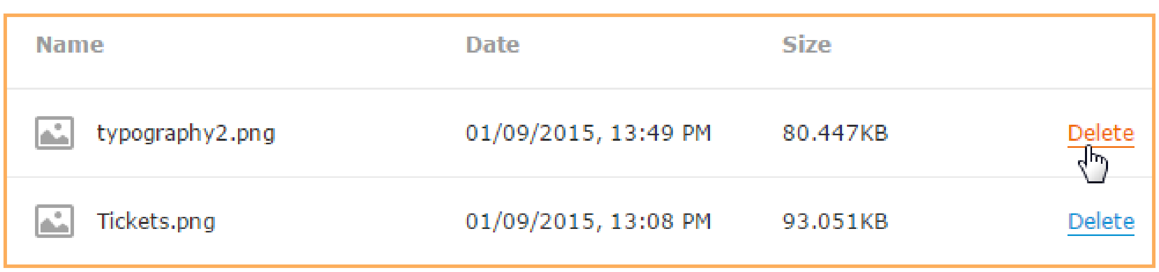
To delete an image file from the **Insert image** dialog within icons view, hover over the file then click the garbage can icon.

Read more/less



You will be prompted to confirm your intention to delete the image.

To delete an image file from the **Insert image** dialog within list view, click the **Delete** link for that file.



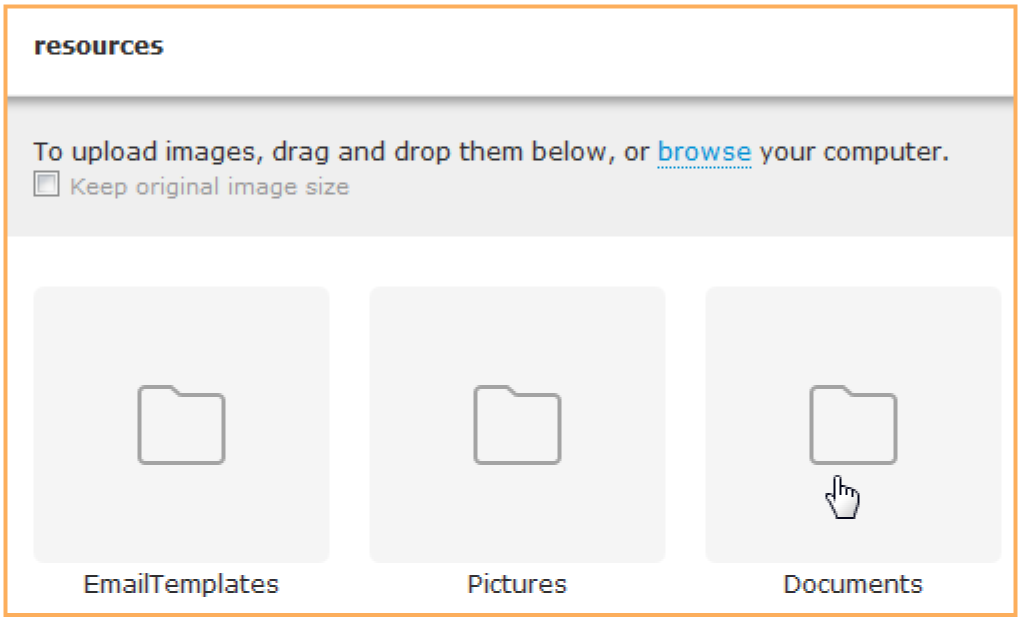
Switching to a different folder

By default, the **Insert image** dialog displays images from the **Pictures** folder, which is grouped under the **Resources** folder within your Wild Apricot account. You can select images from – or upload images to – any folder on your on your Wild Account.

Read more/less

To switch to a different folder, click the **Resources** link...

...to display the other folders grouped under the **Resources** folder.

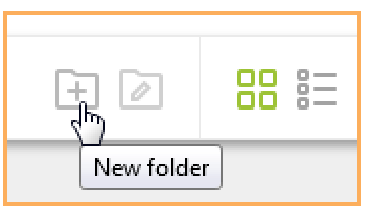


Now, double click on the folder you want to switch to.

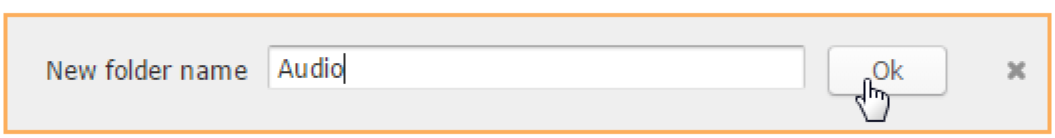
Creating a new folder

You can create a new folder under the current folder. To do so, click the **New folder** icon within the **Insert image** dialog.

Read more/less



You will be prompted to enter a name for the new folder. After doing so, you can click the **OK** button to add the folder or click the **X** button to cancel the addition.



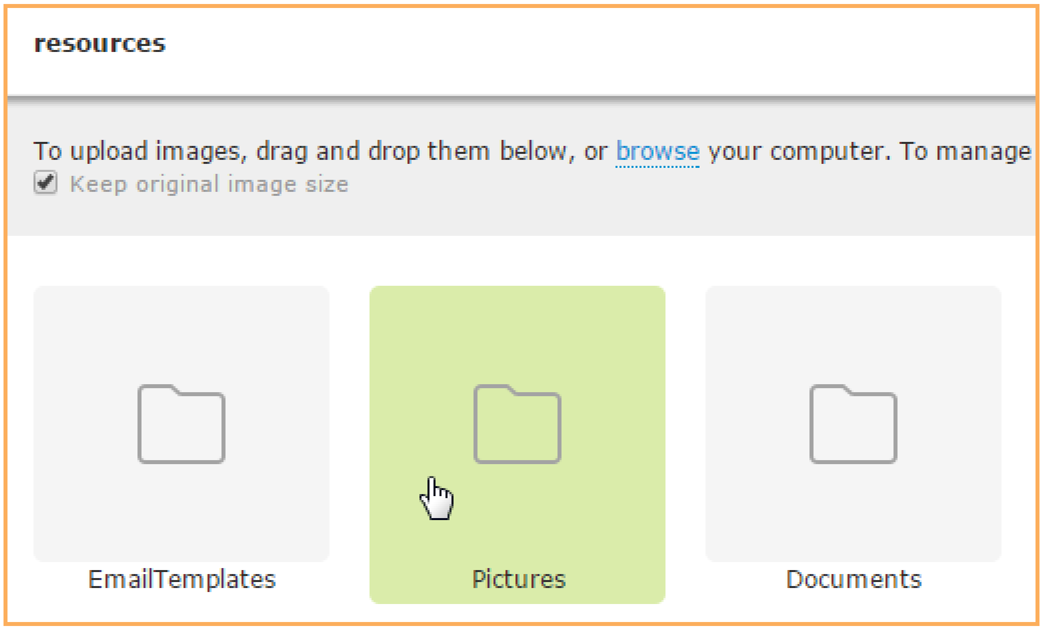
Renaming an existing folder

You can rename any of the folders within your Wild Apricot account from the **Insert image** dialog. To do so, follow these steps:

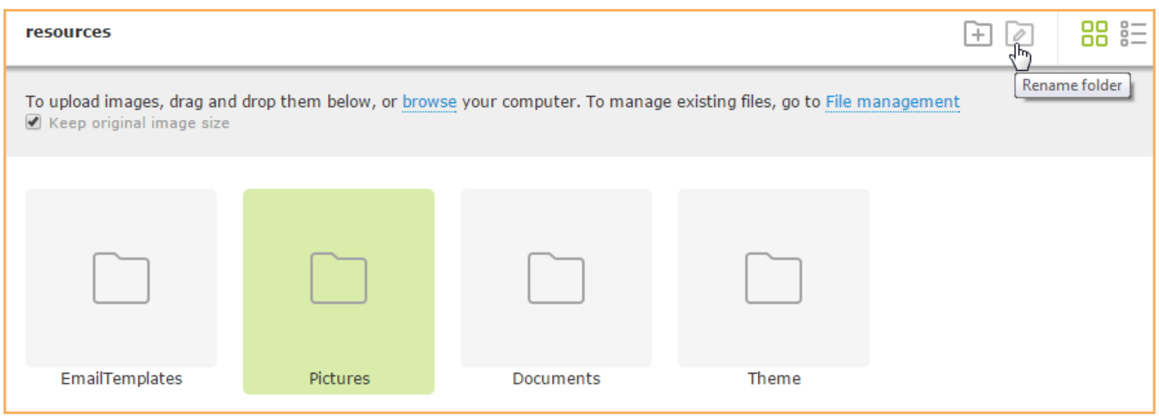
Read more/less

1. Switch to the folder above the folder you want to rename. For example, if you wanted to rename the **Pictures** folder, you would click the **Resources** link to display all the folders grouped under the **Resources** folder.

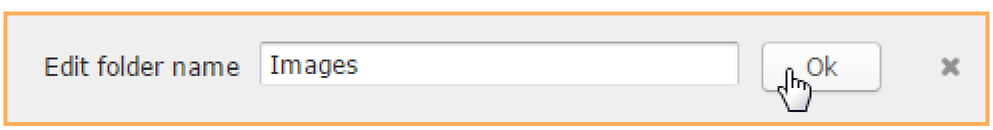
2. Click the folder you want to rename. It will appear highlighted.



3. Click the **Rename folder** icon.



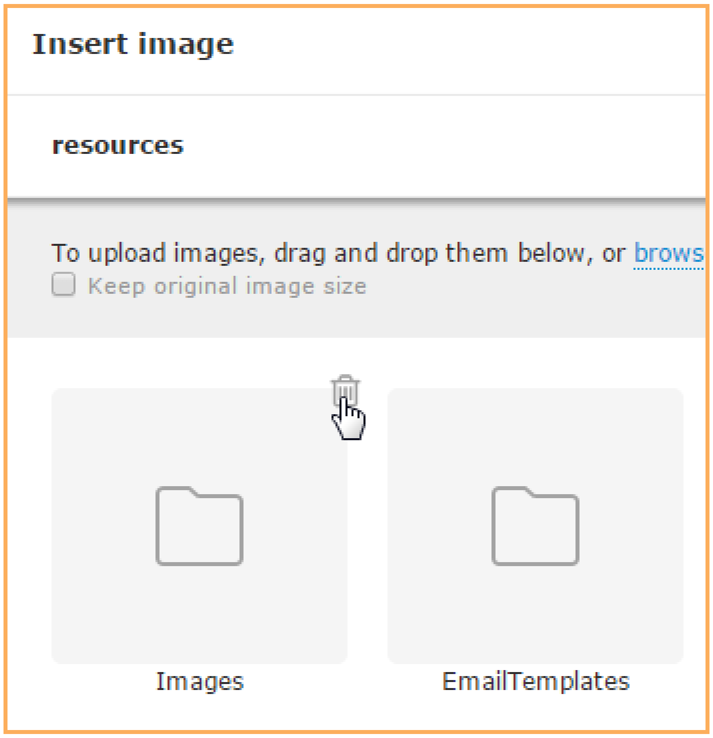
4. Enter a new name for the folder in the field that appears.
5. Click the **OK** button.



Deleting a folder

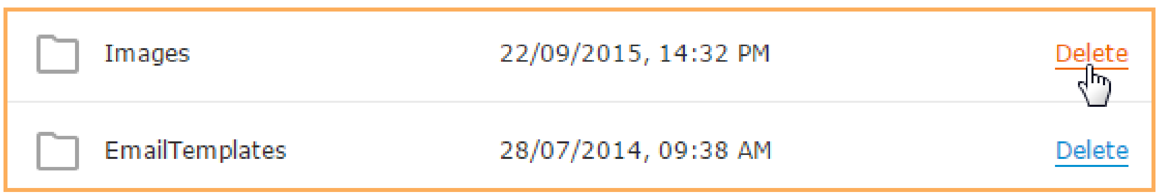
To delete a folder from the **Insert image** dialog within icons view, hover over the folder then click the garbage can icon.

Read more/less



You will be prompted to confirm your intention to delete the folder.

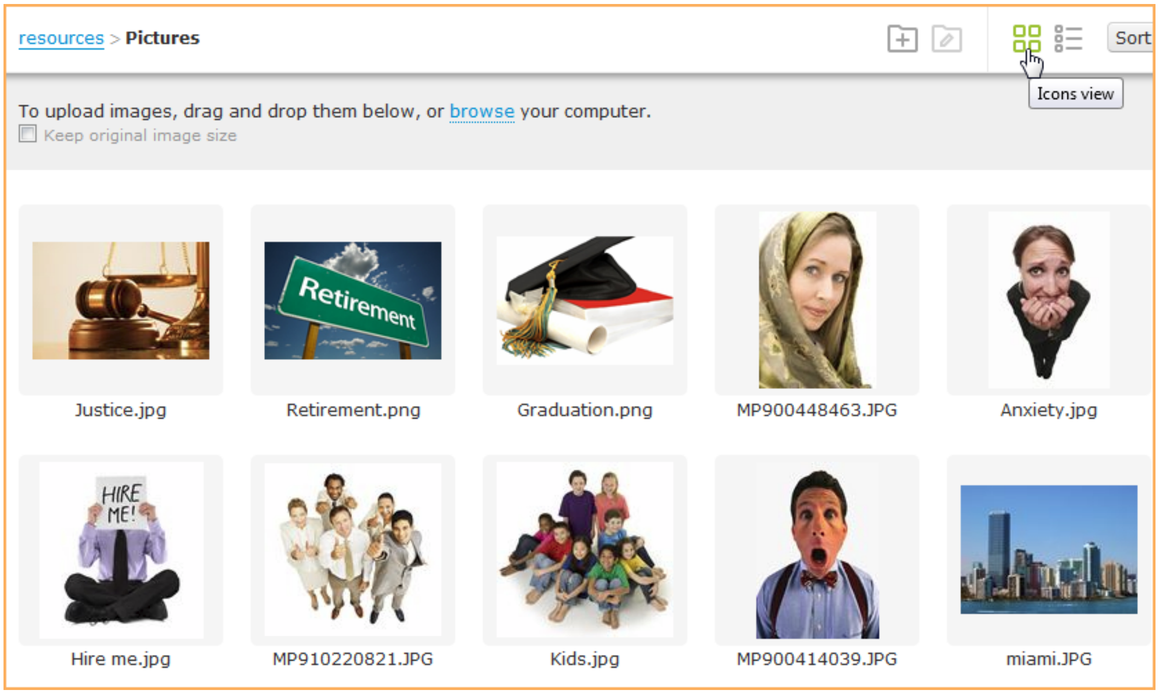
To delete a folder from the **Insert image** dialog within list view, click the **Delete** link for that folder.



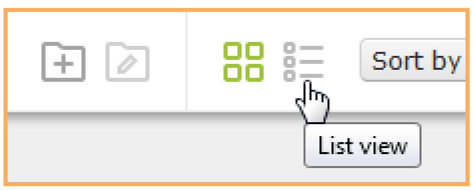
Changing the file view

By default, the **Insert images** dialog displays thumbnails for each image, along with the file name. This is called *icons view*.

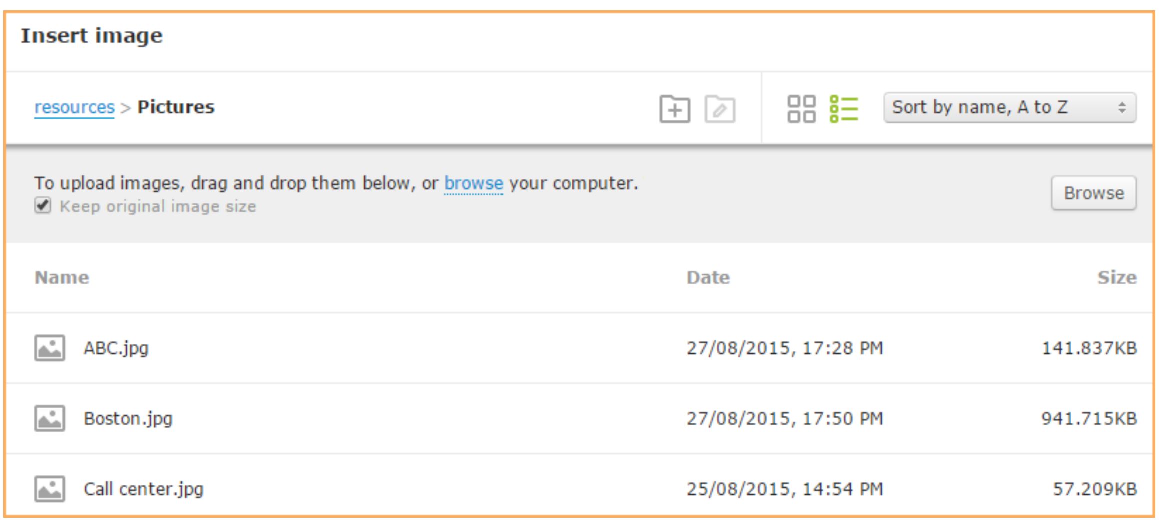
Read more/less



You can switch from icons view to *list view*, which displays image file details instead of thumbnails. To switch to list view, click the **List view** icon in the upper right corner of the **Insert image** dialog.



Now, the **Insert image** dialog displays the name, date, and size of each image within the current folder.

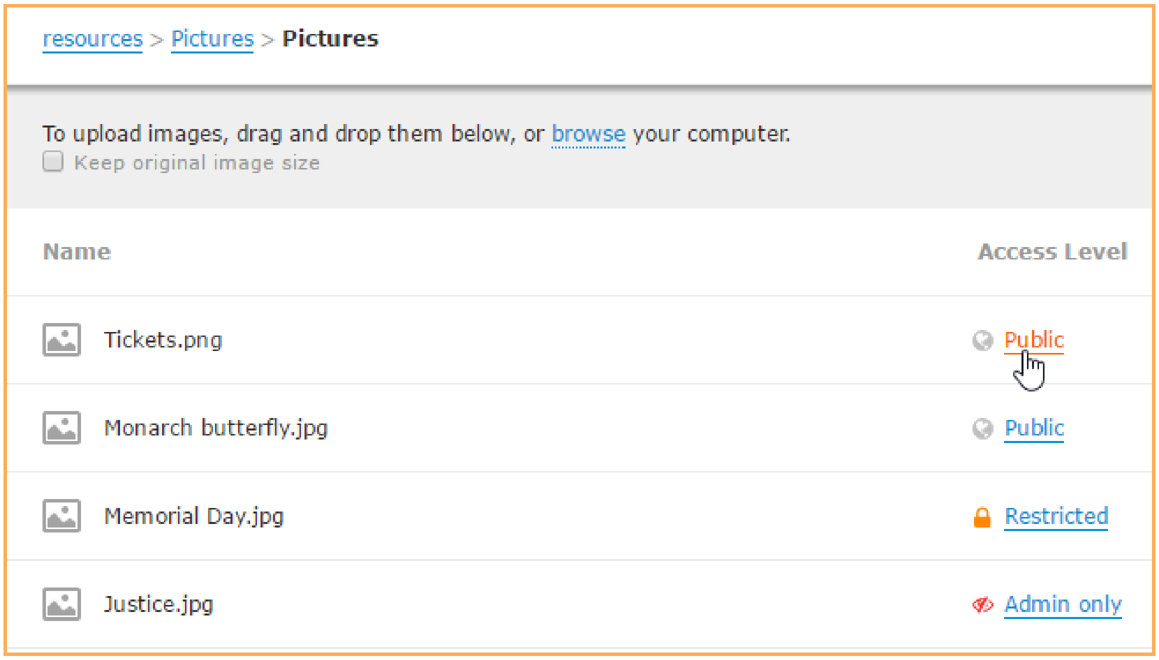


Restricting file access

You can restrict access to files, one at a time, from the Insert dialog. You can only set access restrictions from list view, not icons view. You can also restrict file access from the Files screen. For more information, see Restricting access to files.

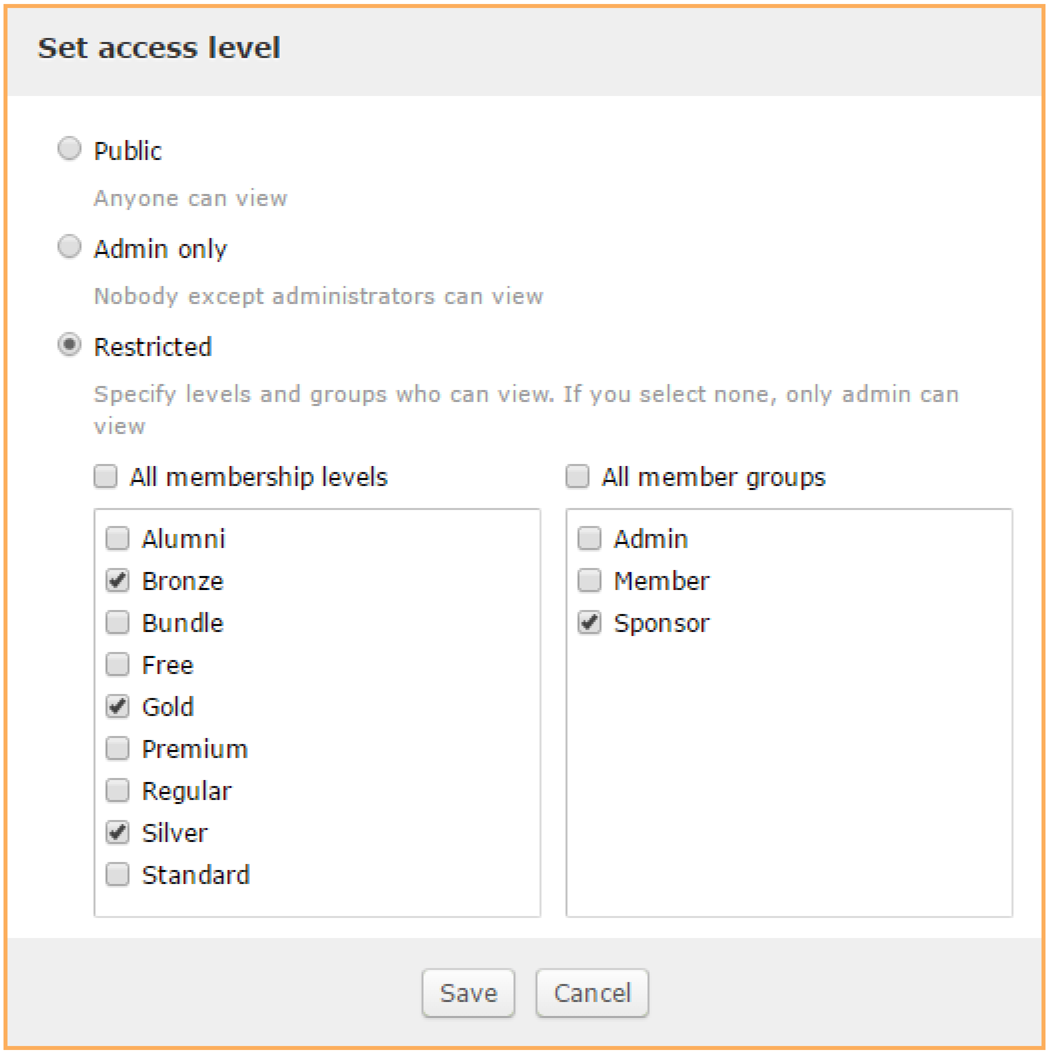
To set access restrictions for a file from list view, follow these steps:

1. Click the link under the **Access level** heading for the file you want to restrict.



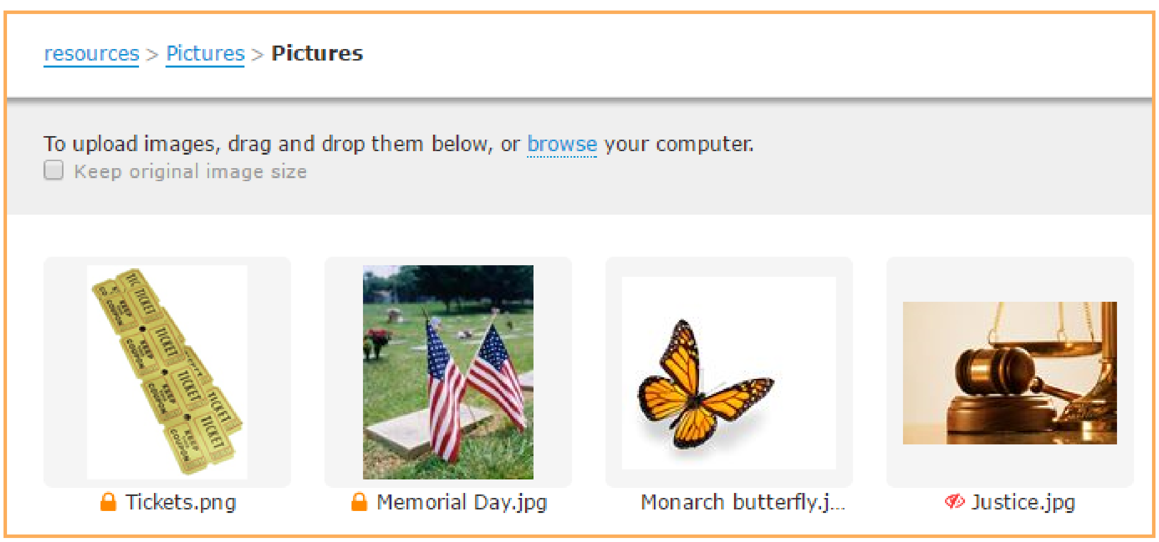
Depending on the current access level, the link might appear as **Public**, **Admin only**, or **Restricted**.

2. From the Set access level dialog that appears, choose the type of users you want to be able to access the file.



3. Click the **Save** button to save your changes.

In icons view, files with restricted access will be flagged by an icon beside the file name.

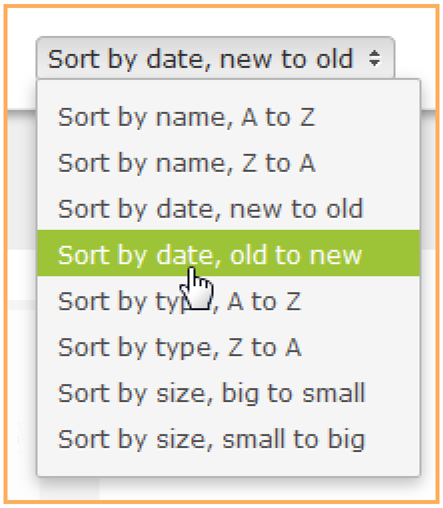


Changing the sorting order

You can change the order in which images are displayed, either in icons view or in list view. You can sort the images by name, date, type (file extension), or size, in ascending or descending order.

Read more/less

To change the sorting order of the images, click the sorting options that appear in the upper right corner of the dialog and choose a different option.

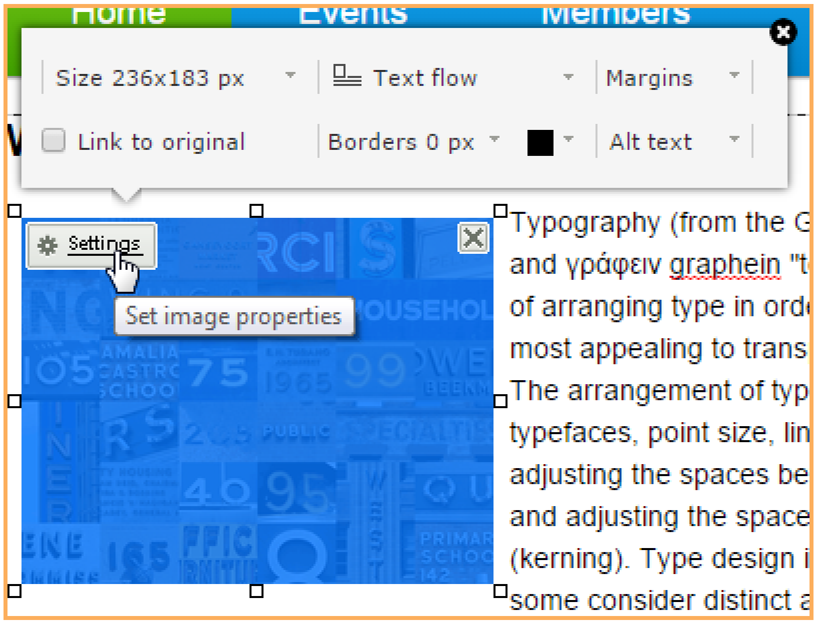


Setting image properties

After you've inserted a picture, you can change its properties, including its size. To set the properties for a picture while editing the site page, page template, email, email template, or event description in which it appears, position your pointer over the picture, then click the **Settings** option.

Read more/less

From the image settings toolbar that appears, you can change any of the image settings.



The following options appear on the image settings toolbar:

Option	Description

<table>
<tr><td>Size</td><td>The displayed size of the image. By default, images are inserted at 100% of the container width (the area in which its appears). The following size options are available.
<table>
<tr><th>Option</th><th>Description</th></tr>
<tr><td>Original</td><td>Use the picture's original dimensions. Setting the image size to Original may result in the image appearing cropped, if the original size is greater than the container in which it appears (e.g. the content gadget).</td></tr>
<tr><td>Small</td><td>Display the image at 25% of the container width (the area in which its appears) or image size, whichever is smaller.</td></tr>
<tr><td>Medium</td><td>Display the image at 50% of the container width or image size, whichever is smaller.</td></tr>
<tr><td>Large</td><td>Display the image at 100% of the container width or image size, whichever is smaller.</td></tr>
<tr><td>Custom</td><td>Use the horizontal and vertical dimensions you provide. If the Maintain ratio checkbox is checked, one of the dimensions may be adjusted to maintain the image's aspect ratio. Setting a custom image size may result in the image appearing cropped, if the custom size is greater than the container in which it appears (e.g. the content gadget).</td></tr>
<tr><td>Maintain ratio</td><td>Controls whether the image's aspect ratio is maintained when a Custom size is specified. With the Maintain ratio option checked, one of the custom dimensions may be adjusted to maintain the image's aspect ratio.</td></tr>
</table></td></tr>
<tr><td>Link to original</td><td>Links the picture to the original full-sized image file. You can use this option to create a thumbnail that can be clicked to display the full-sized image in a separate browser tab.</td></tr>
<tr><td>Alt text</td><td>Text that appears when a mouse pointer is positioned over the picture, or when the picture cannot be displayed.</td></tr>
</table>

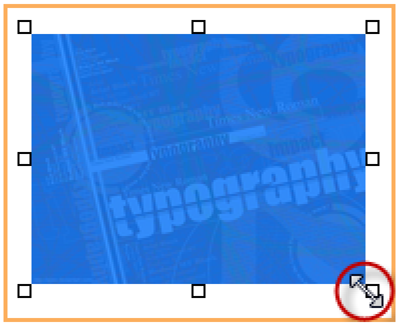
<table>
<tr><td>Alignment/text flow</td><td>Controls the alignment of the picture and the positioning of adjoining text.
<table>
<tr><th>Icon</th><th>Description</th></tr>
<tr><td></td><td>The image appears inline with the adjoining text. The baseline of the first line of text will align with the bottom of the image.</td></tr>
<tr><td></td><td>The image will appear on the right. Any text that appears with wrap to the left of the image.</td></tr>
<tr><td></td><td>The image will appear on the left. Any text that appears with wrap to the right of the image.</td></tr>
<tr><td></td><td>The image will appear on the left. Any text that appears will break above and below the image.</td></tr>
<tr><td></td><td>The image will appear centered. Any text that appears will break above and below the image.</td></tr>
</table></td></tr>
<tr><td>Margins</td><td>The amount of space – in pixels – that appears around the image.</td></tr>
<tr><td>Borders</td><td>The width and color of the frame that surrounds the picture (if any). You can select predefined thickness options or specify custom thickness (in pixels). When specifying the border color, you can select a color from the theme-specific colors at the top or from the drop-down palette below, or enter the hexadecimal code for the color (e.g. #FF0000 for red).</td></tr>
</table>

For more advanced options, you can go into HTML mode after inserting the picture and modify the picture's <img> tag parameters.

Resizing a picture manually

You can set the image size, along with other image properties, using the image editing toolbar, or you can resize an image by clicking on it – while editing the content gadget, event details, email, or email template in which it appears – then dragging its selection handles inward or outward.

Read more/less



Dragging a handle inward makes the image smaller, while dragging outward makes the image larger. You can use any of the selection handles, each of which can be used to resize the image while maintaining its proportions.

Moving a picture

After inserting a picture into a web page, email, or email template, you can reposition it relative to the surrounding text by dragging and dropping it to a different location within the current section.

Read more/less

> Dragging and dropping may not work in some browsers (such as Safari on a Mac) and may display misleading error messages such as *File type not supported*.

Removing a picture

To remove an existing picture from a web page, email, or email template, enter edit mode then position your mouse over the picture and click the **X** icon in the top right corner of the picture.

Read more/less

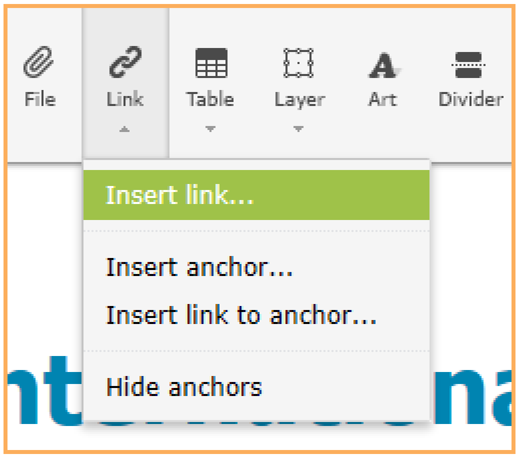
You can also delete a picture by selecting it then pressing the **Delete** key on your keyboard.

Linking a picture

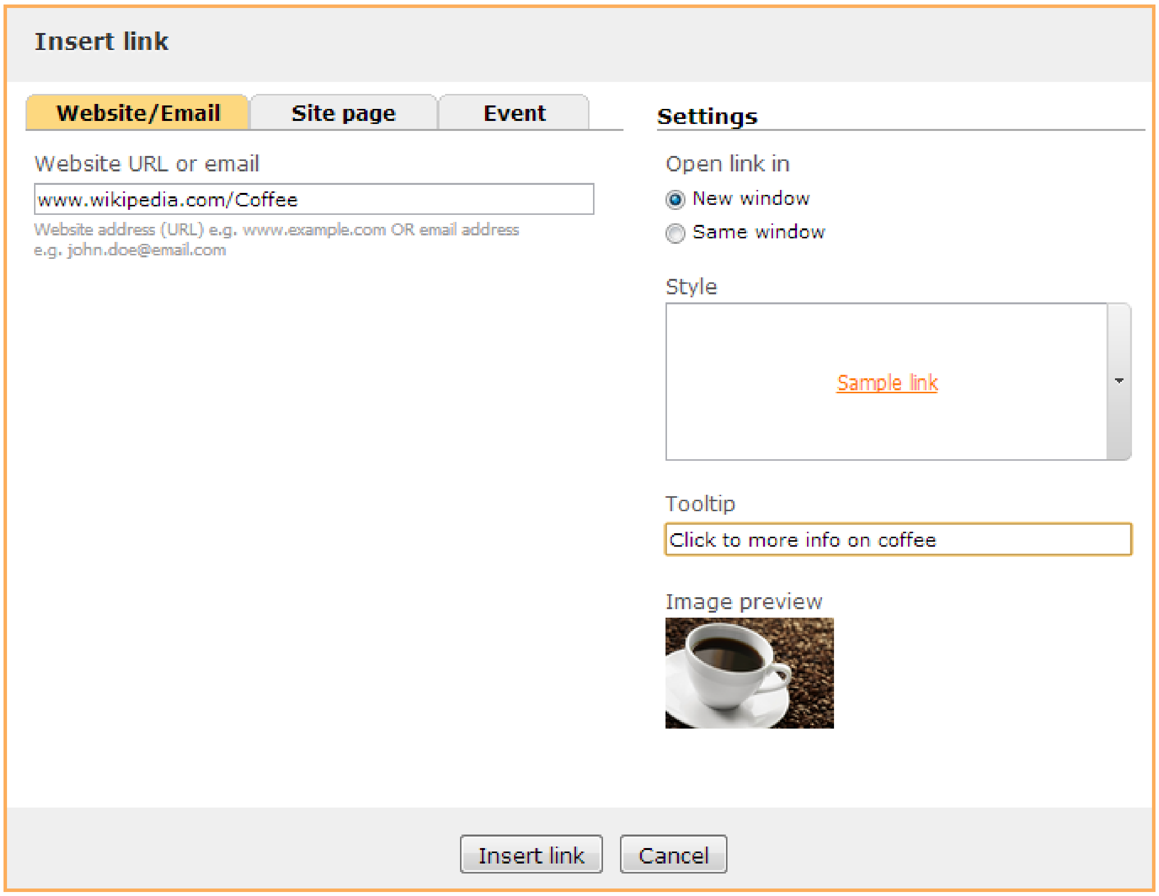
You can link a picture so that when visitors click it, they will go to a particular web site, site page, event page, or email address. To link a picture, follow these steps:

Read more/less

1. While editing the site page, page template, email, or event description, click the picture you want to link. (In some browsers, you might have to click-drag-release to select.)
2. Click the **Link** dropdown in the toolbar towards the top of the page and select **Insert link**.



3. From the **Insert link** window that appears, select the destination for the link.



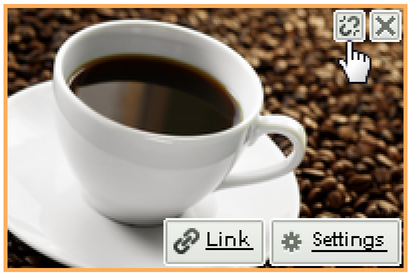
If you previously selected the **Link to original** option for the picture, then a link will appear to the full version of the picture.

To select the destination for the link, enter a website address or email address in the **Website URL or email** field, click the **Site page** tab to select a page from your site, or click the **Event tab** to select an event from your site. For events, you can choose whether to link to an event's detail page or registration page.

4. You can also enter a tooltip to be displayed when a mouse pointer is positioned over the picture, and control whether the link opens in a separate browser window. If you previously entered **Alt text** for the picture, then the picture's Alt text will appear as the tooltip for the link.
5. Click **Insert link**.

To modify a link for a picture, enter edit mode then hover over the picture and click **Link**. From the **Edit Link** window that appears, you can change the link.

To unlink a linked picture, click the **Unlink** button within the **Edit link** window, or click the **Unlink** icon in the upper right corner of the image.



Pasting pictures from other sources

You can paste pictures, along with other content from external sources such as Microsoft Word, Google Docs, Apple's Pages, a website, or an email. To do so, click within the content gadget, email body, event description, blog post, or forum topic where you want the content to appear then click the **Paste** icon within the content editor.

Read more/less

Pictures can only be pasted from sources that store images using URLs – such as Google Docs, web pages, and emails. Pictures cannot be copied and pasted from other sources such as Microsoft Word.

To modify the settings of the pasted images, you cannot use the image settings toolbar dialog as you would when modifying a picture inserted directly through the content editor. Instead, you must click the HTML button within the content editor and modify the HTML code.

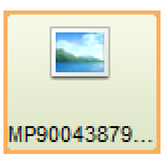
File formats and naming restrictions

You can insert pictures saved using the following file formats: JPG, PNG, GIF. Your image file names **must not** contain any the following characters: * / : ? < > " % & @ or double spaces.

Troubleshooting

Image not showing up in some or all browsers

Most browsers can only display images that use the RGB color model. If you upload an image created using the CMYK color model (used for high quality printing) then the image might not display and instead you only see a placeholder thumbnail.



To convert the image to the supported RGB format just open the image in a standard image editor like MS Paint and save it.

You can also use online tools to convert your image to RGB format e.g. www.cmykconverter.com or www.cmyk2rgb.com.

For more information on color models, click here.

Image appears rotated

If a picture appears at the wrong angle – rotated 90 degrees, for example – try saving the picture using a different file format (e.g. .PNG) then loading the new file.

Transparency lost when inserting a PNG file

When uploading a PNG image with a transparent background that has a dimension larger than 1920 x 1080, if you uncheck the **Keep original image size** option – allowing the image to be resized – the transparency will be lost, and the image will appear with a white background. If you upload the file with this option checked, the transparency will be retained.

On this page:

Expand all sections

See also:

- File management
- Photo albums

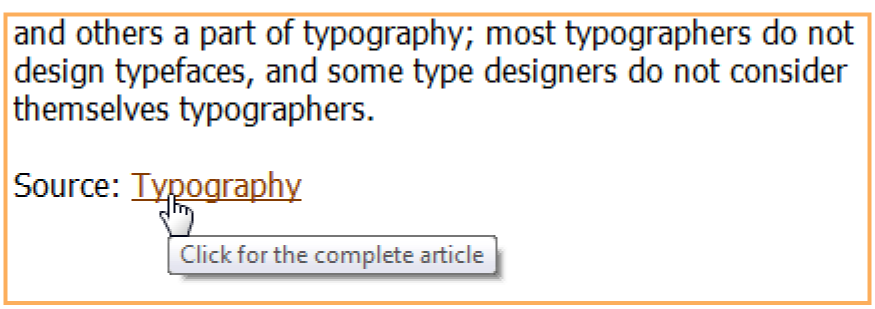
Inserting links

Inserting links

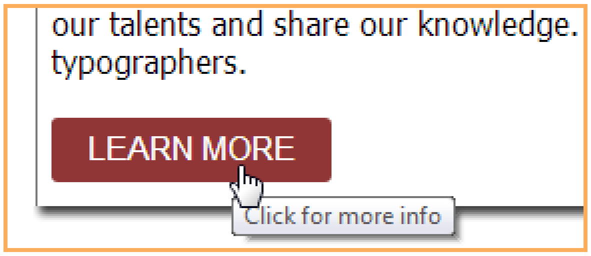
You can insert links in your site pages, page templates, emails, and event descriptions, so that visitors to your site can click the links and...

- jump to another page on your site
- jump to a specific section within the same page or another page on your site
- jump to another site, or
- send an email

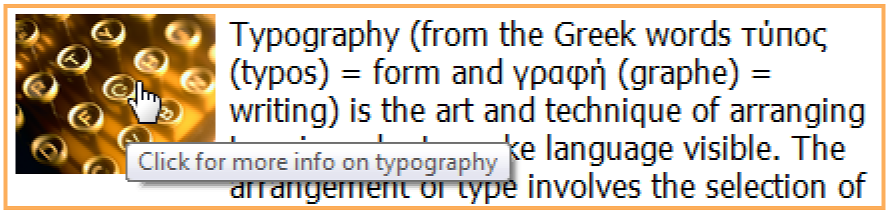
The link can appear as text...



...as a button....



...or as a picture.



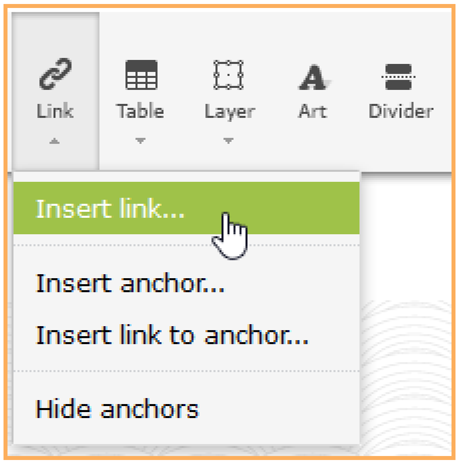
For instructions on inserting links to documents and other files, see Inserting documents.

Inserting a link

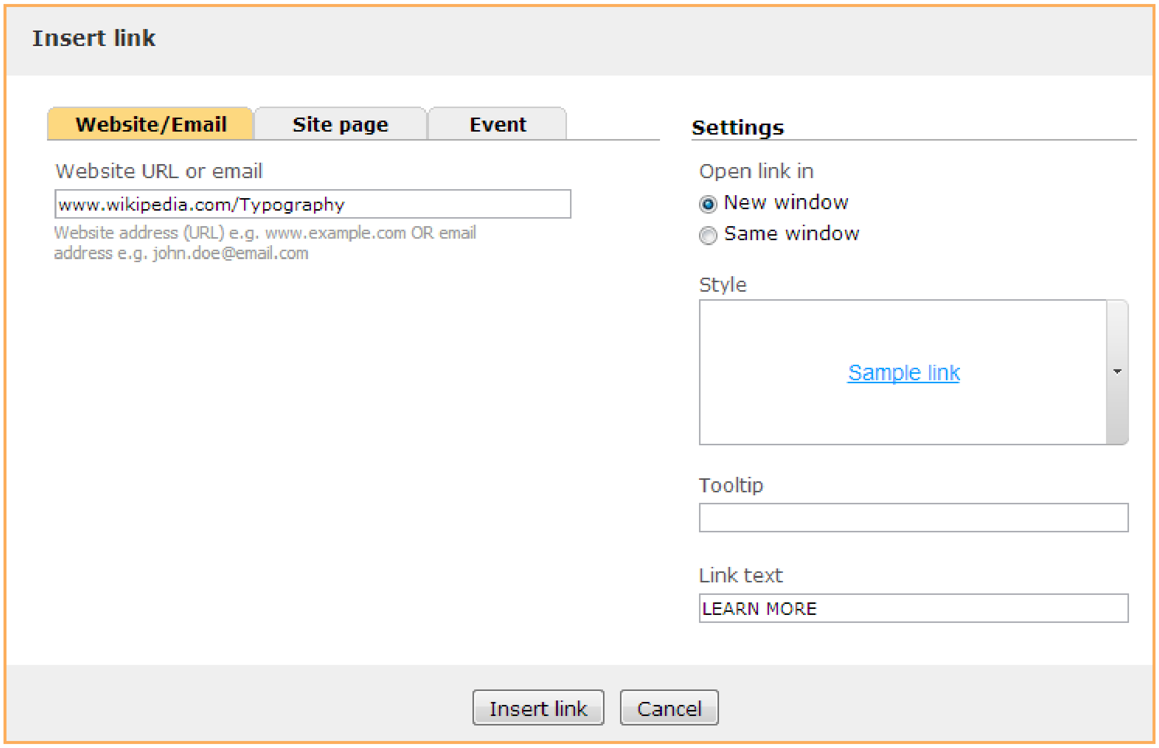
You can insert a link in a content gadget on either a site page or a page template, and in emails and event descriptions. To insert a link, follow these steps:

Read more/less

1. Begin editing the site page, page template, email, email template, or event description.
2. Click within the content gadget, email body, or event description where you want the link to appear. The content editor toolbar should now appear at the top of the screen.
3. If you want the link to appear as text or a button, either select the text within the gadget or click where you want the text to appear. (You can specify the link text in a subsequent step.) If you want to link a picture, click the picture within the page.
4. Click the **Link** dropdown in the toolbar towards the top of the page and select **Insert link**.



5. From the **Insert link** window that appears, you choose where the link should go to.



The following options are available.

Option	Description	Next step
Website/Email	Link to an email address or another website.	Enter the email address or website URL. There are separate instructions for linking to encoded email addresses (see below).
Site page	Link to another page on your Wild Apricot site.	Select the page from the list.
Event	Link to the detail page or registration form for one or your events.	Select the event from the list of past and upcoming events. Choose whether to link to the event's detail page or registration page.

6. Choose whether you want the linked page to open in a new window or the same window.
7. If you want the link to appear as a button within a page or page template, click the **Style** drop-down and select a button style.

The available styles vary depending on your current website theme.

8. Specify a tooltip to be displayed when a mouse pointer is positioned over the link text or picture.
9. If you want to display a text link, you can specify the link text (unless you selected the text before selecting the **Insert link** option) .
10. When you are done defining the link, click **Insert Link**.

You can also link to another section within the same page or another page by inserting an anchor on the page then linking to it. For more information, see Inserting an anchor and Linking to an anchor, below.

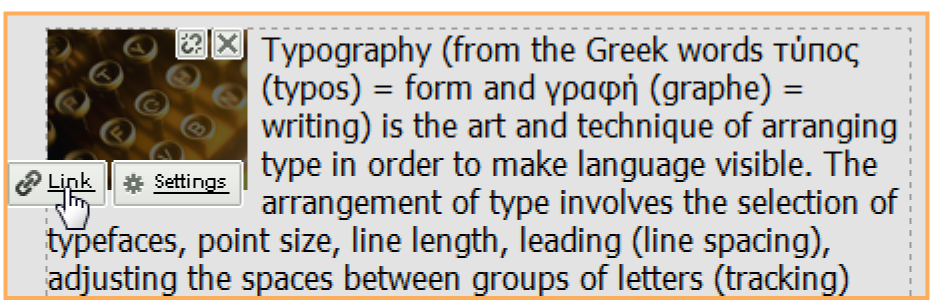
Modifying and removing a link

To modify a text link while in edit mode, select any portion of the link then click the **Link** dropdown and select **Edit link**.

Read more/less

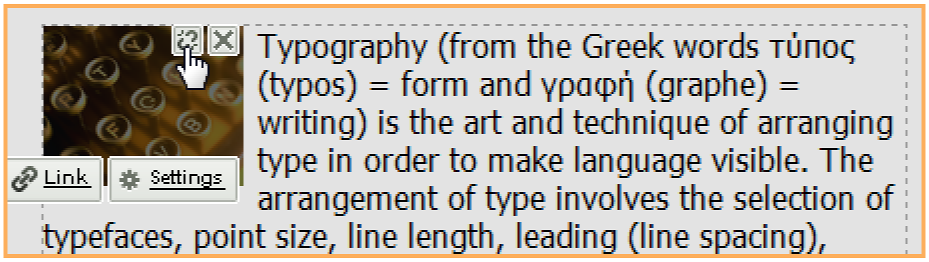
From the window that appears, you can change the link destination and the tooltip, and whether the link opens in a new window. You can also click the **Unlink** button to remove the link.

To modify a picture link, enter edit mode then hover over the picture and click **Link**.



From the window that appears, you can change the link details or click **Unlink** to remove the link.

You can also remove the link by clicking the unlink icon that appears in the upper right corner of the image when you hover over it.



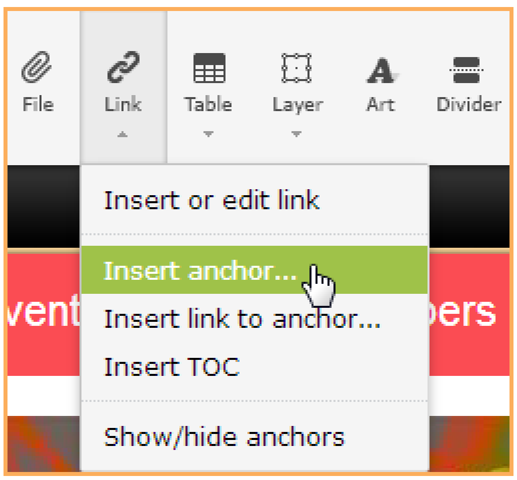
Inserting an anchor

If you have a long web page, you may want to provide links to individual sections within the page so visitors can jump right to those sections. You might also provide a link to jump to the top of the page. Before you can link to a section within a page, you have to mark the section by inserting an anchor.

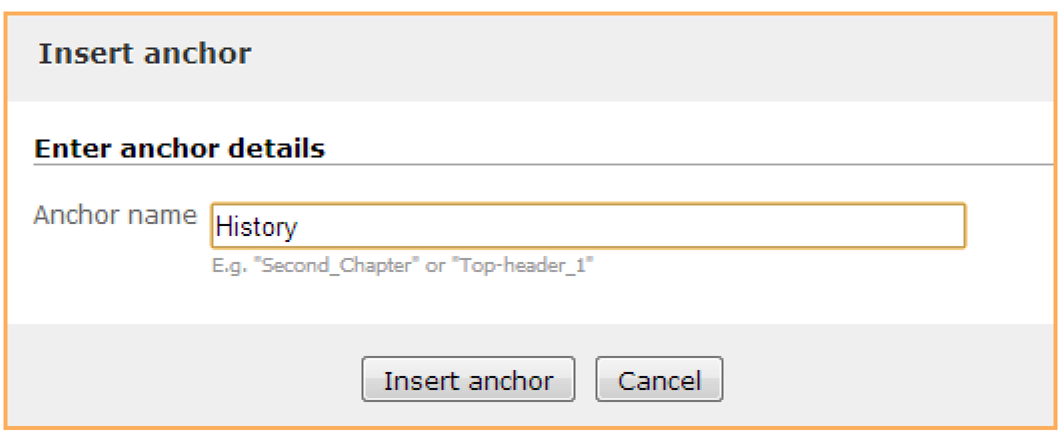
Read more/less

To insert an anchor, follow these steps:

1. Begin editing the site page or page template where you want the anchor to appear.
2. Click the content gadget in which you want the anchor to appear.
3. Within the content gadget, click where you want the anchor to appear.
4. Click the **Link** dropdown in the toolbar and select **Insert anchor**.

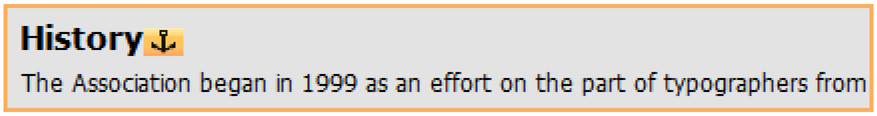


5. In the window that appears, enter the anchor name – a keyword to identify the anchor (without spaces).



6. Click **Insert anchor**.

The anchor is represented in edit mode by an anchor icon.



To hide anchor icons from appearing on any of your pages in edit mode, click the **Link** dropdown and select **Show/hide anchors**.

Now that you have inserted an anchor, you can link to it from this page or another Wild Apricot page.

Linking to an anchor

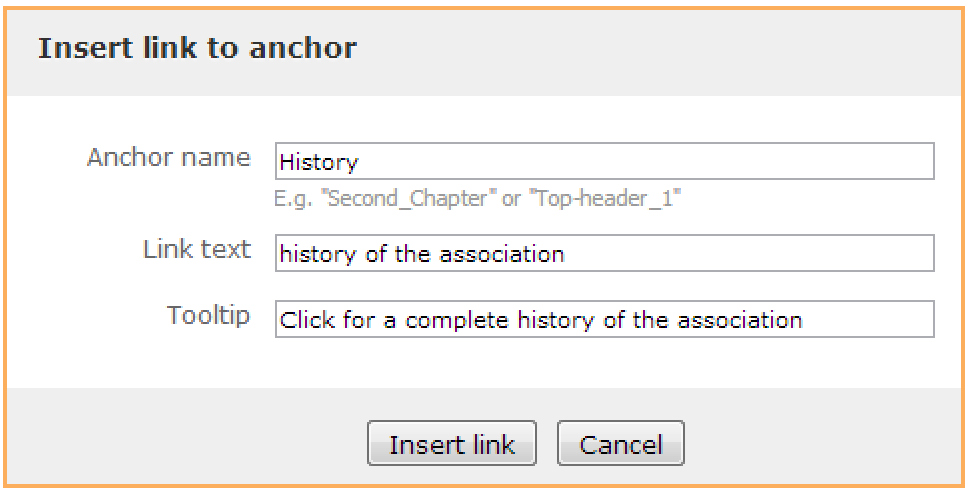
You can link to an anchor from the same page or from a different page. The link can be in a different content gadget than the anchor within the same page.

Linking to an anchor on the same page

To add a link to an anchor on the same page, follow these steps:

Read more/less

1. Select the text or picture you want to use as the link.
2. Click the **Link** button in the toolbar and select **Insert link to anchor**.
3. In the window that appears, enter the name of the anchor you want to link to, and optionally, the tooltip you want to appear when a mouse pointer is positioned over the link text or picture.



4. Click **Insert link**.

Linking to an anchor on another page

To add a link to an anchor on another page, follow these steps:

Read more/less

1. Select the text or picture you want to use as the link.
2. Click the **Link** button and select **Insert link**.
3. Select or enter the address of the other page then click **Insert link**.
4. Click the **HTML** button, and find the *<a href>* tag for the link (e.g. *history of the Association*).
5. Add ***#anchorname*** to the end of the link destination (where *anchorname* is the name of the anchor). For example, if you want to link to a *History* anchor on a page with a custom URL of *About*, the link would be *your link text*.
6. Click **Save** to exit the **Edit HTML** window.
7. Click **Save** to save changes to the page.

Linking to encoded email addresses

Displaying your email address on your Wild Apricot site will expose it to spammers' email harvesting bots, even if you hide it behind link text. To reduce the chance of this, you can *encode* your email address so that bots can't see it but browsers can still interpret it.

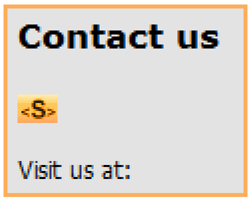
Read more/less

> Some email harvesting bots may still be able to interpret encoded email addresses.

To link to an encoded email address, follow these steps:

1. Go to a site that offers free email address encoding (for example, MailTo Encoder). Pick one that generates JavaScript code rather than HTML code. (If you use HTML, Wild Apricot's automatic code cleanup will convert the encoded address back to the actual address.)
2. Generate the JavaScript code to encode your email address and copy the code to your clipboard.
3. Begin editing the site page or page template where you want the link to appear.
4. Click the content gadget in which you want the link to appear.
5. Within the content gadget, click where you want the link to appear.
6. Click the **S (Snippet)** button within the toolbar at the top.
7. Within the code box, right click and select **Paste**.
8. Click **Save** to exit the window.
9. Click **Save** to save changes to the page.

In edit mode, the link is represented using a code snippet icon:



On your site page, the link will be displayed using the link text you have specified.

If you're using Enkoder and the link does not work, contact Wild Apricot support for help adjusting the Enkoder embed code.

Video: Inserting links (7:16)

On this page:

Expand all sections

See also:

- Inserting documents and files

Inserting documents and files

Inserting documents and files

On your Wild Apricot site, you can insert links to documents stored on your Wild Apricot account – such as PDFs, Word files, Excel files, etc. – that visitors to your site can view or download.

Clicking on the link will either open or download the document, depending on your browser and computer setup.

You can also embed documents – including PDF files – so that they appear directly on your web page. If you don't want to display the document within a web page, you can link to an external document viewer.

Linking to documents

You can insert links to documents stored on your Wild Apricot account while editing a site page, page template, email, email template, event description, blog post, or forum topic.

You can upload documents to your Wild Apricot account as part of the process of inserting a document link, or by using file management or WebDAV. Using WebDAV allows you to copy multiple files or folders at the same time.

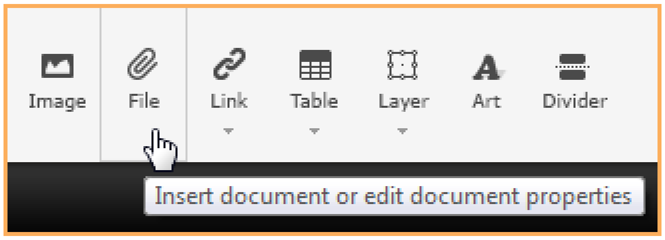
Any file uploaded to your site can be accessed via a direct link, even if it appears on a restricted or encrypted site page. You should avoid storing any sensitive files or make sure their name and location can't be guessed. Search engines will not find and index them unless you link to them from your public web pages.

Inserting a document link

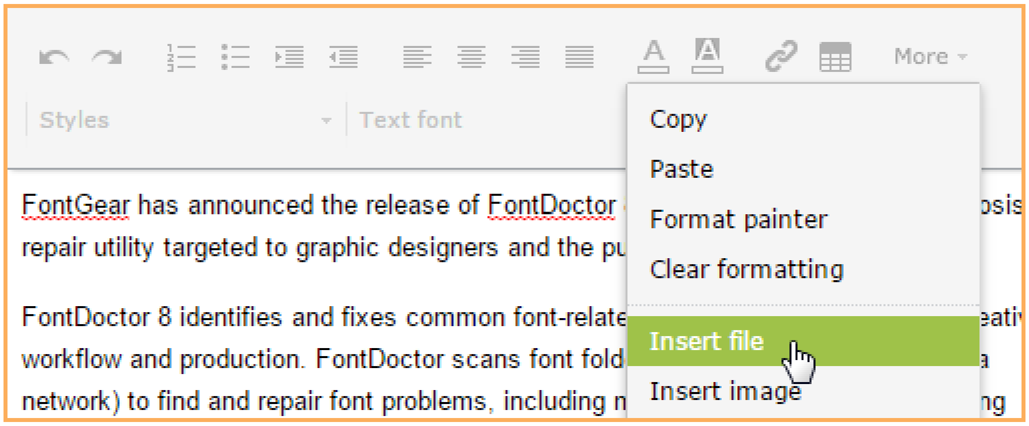
To insert a link to a document stored on your Wild Apricot account, follow these steps:

Read more/less

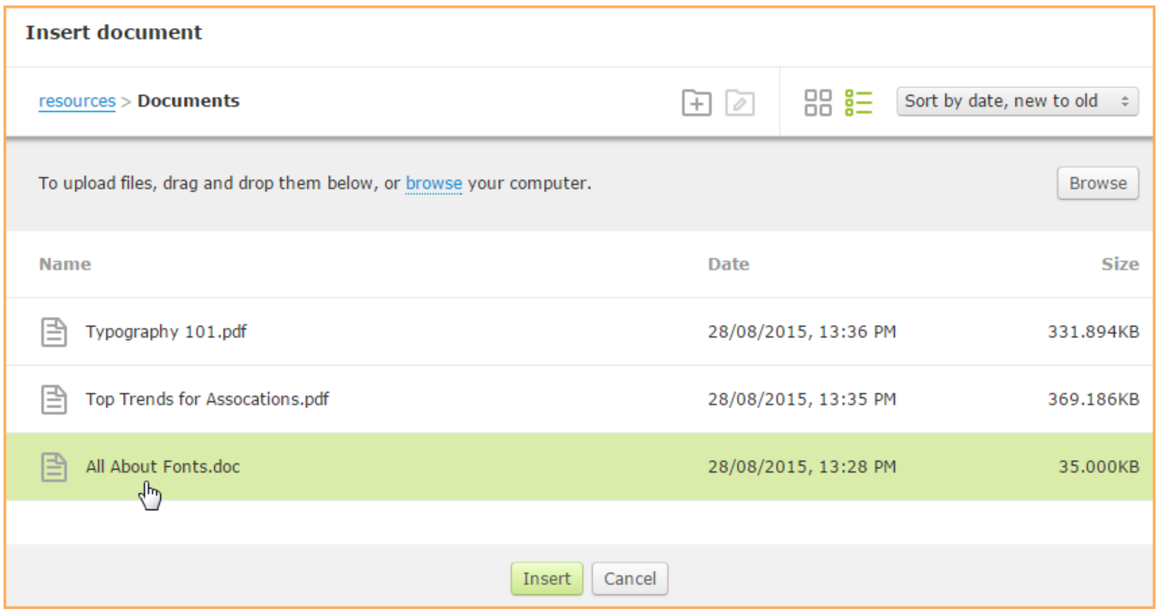
1. Begin editing the site page, page template, email, email template, or event description.
2. Click within the content gadget, email body, event description, blog post, or forum topic where you want the link to appear. The content editor toolbar should now appear at the top of the screen.
3. Select the text you want to display as the link text. If you do not select text, then the file name of the document will be inserted as the link text.
4. For content gadgets, emails, and event descriptions, click the **File** icon within the content editor toolbar.



For blog posts and forum topics, click the **More** menu and select the **Insert file** option.



5. From the **Insert document** dialog that appears, you can select a document already stored on your Wild Apricot account, or upload a document stored on your computer or network.



You can navigate between folders in your account, and add, rename, or delete folders. You can delete a file from this dialog, but you cannot copy or move them to a different folder. You can copy and move files from File management. For instructions on uploading a document stored on your computer or network, see Uploading a new document (below).

6. After you have selected the document you want to link to, click the **Insert** button.

Alternatively, you could just double click the file within the **Insert document** dialog.

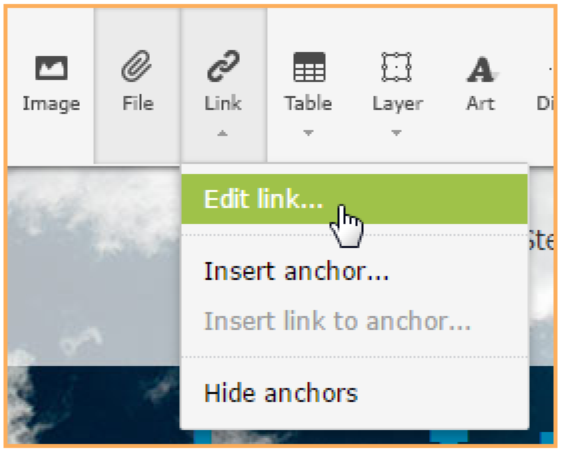
Editing a document link

After you've inserted a document link, you can edit the link. As part of editing the link, you can change the link destination, select a link style, and enter a tooltip.

To edit an existing document link, follow these steps:

Read more/less

1. Click anywhere within the link text.
2. Click the **Link** icon within the content editor toolbar.
3. Select the **Edit link** option.

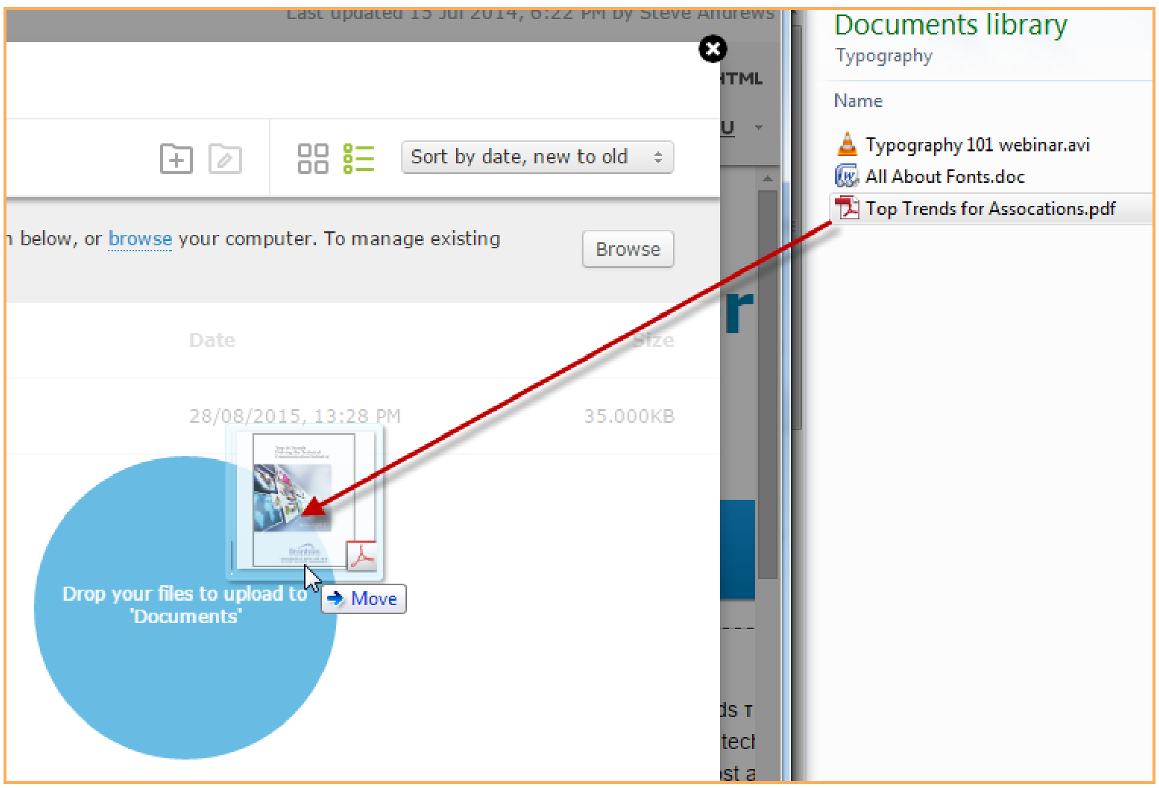


4. From the **Edit link** dialog that appears, you can change the link destination, select a different link style, or enter a tooltip to be displayed when a pointer is positioned over the link text or picture.
5. When you are finished modify the link, click the **Apply changes** button.

Uploading a new document

There are two ways you can upload a new picture from the **Insert document** dialog.
Read more/less

- You can drag and drop a file from File Explorer or Finder onto the dialog.



- You can click the **Browse** button and find the file on your computer or network.

In either case, the file you choose will be added to the currently selected folder.

You can upload any of the file types supported by Wild Apricot. The maximum size of each file is 100 MB. Your overall file storage limit depends on your billing plan.

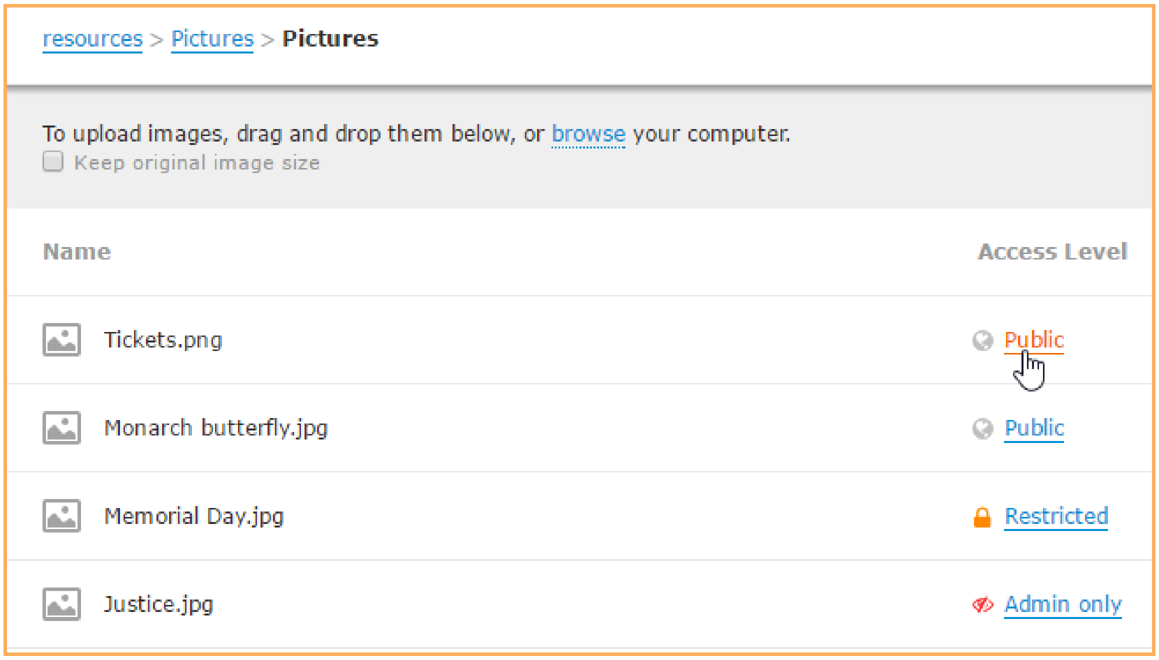
After uploading the file, the file will be selected, and you can insert a link to it by clicking the **Insert** button.

Restricting file access

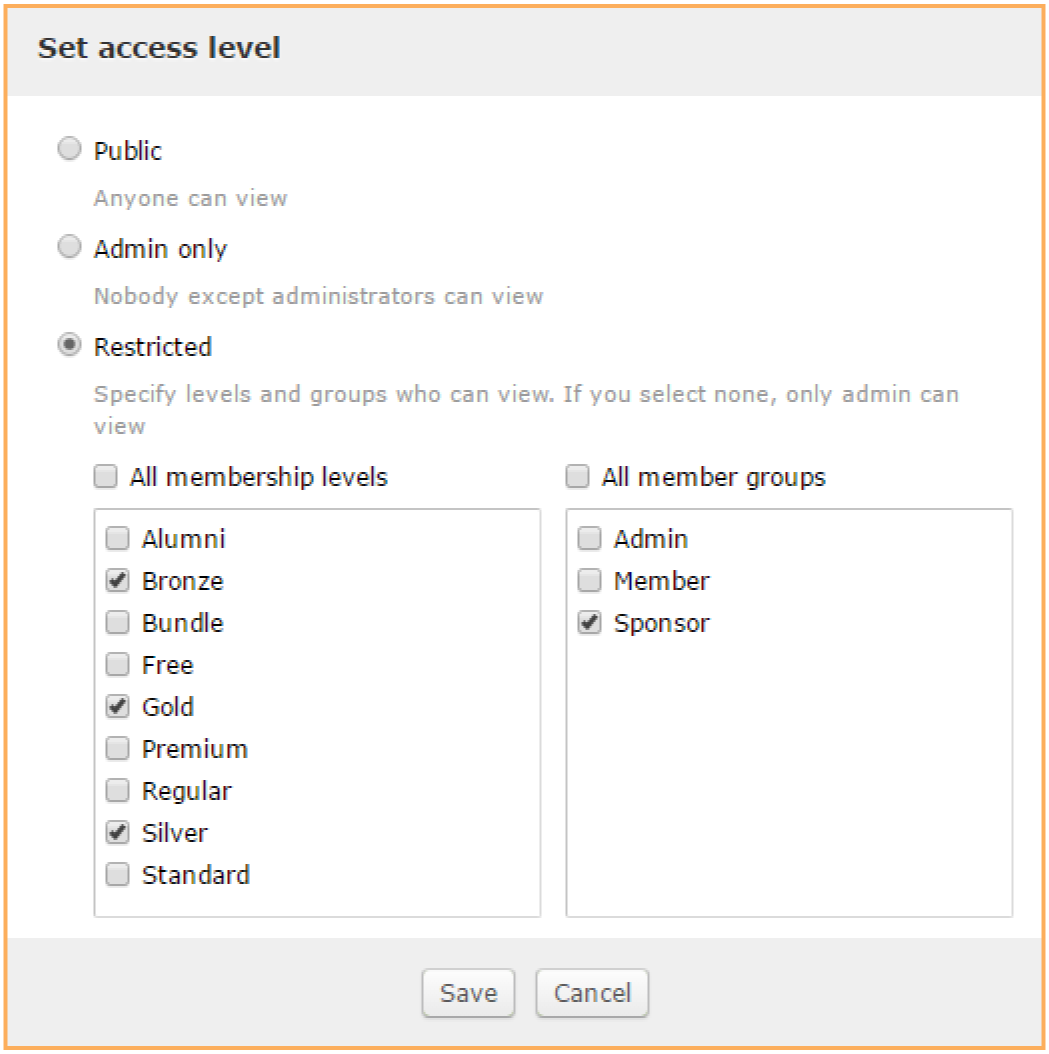
You can restrict access to files, one at a time, from the Insert dialog. You can only set access restrictions from list view, not icons view. You can also restrict file access from the Files screen. For more information, see Restricting access to files.

To set access restrictions for a file from list view, follow these steps:

1. Click the link under the **Access level** heading for the file you want to restrict.

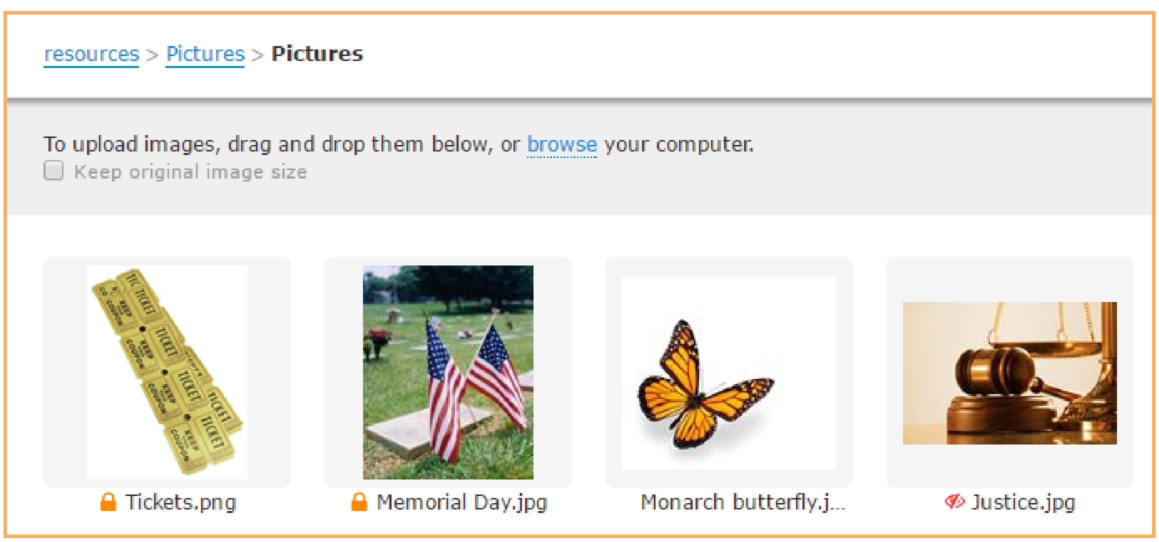


   Depending on the current access level, the link might appear as **Public**, **Admin only**, or **Restricted**.
2. From the Set access level dialog that appears, choose the type of users you want to be able to access the file.



3. Click the **Save** button to save your changes.

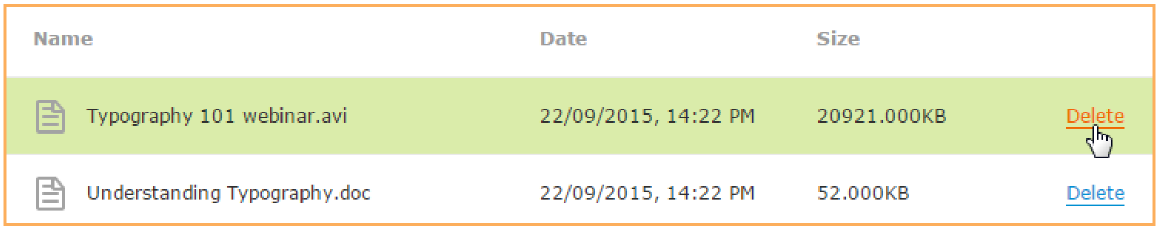
In icons view, files with restricted access will be flagged by an icon beside the file name.



Deleting a file

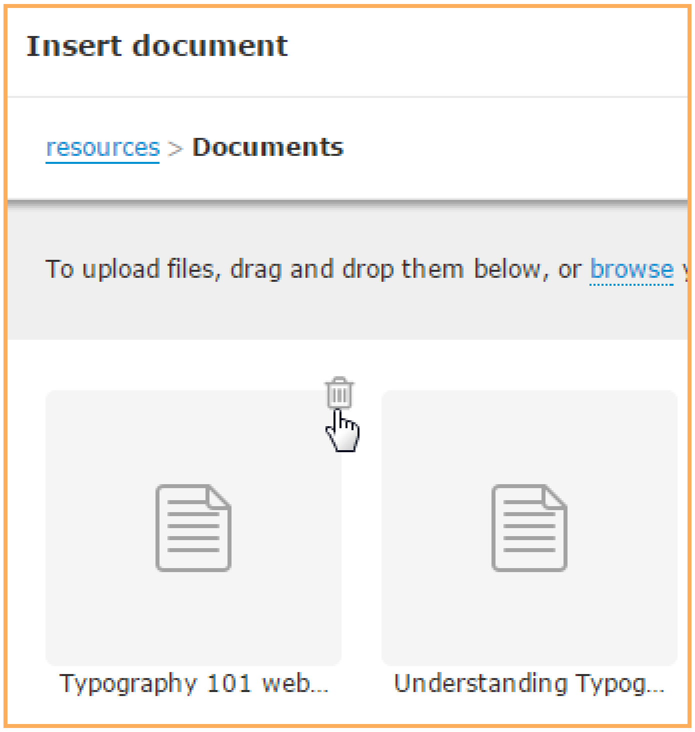
To delete a file from the **Insert document** dialog within list view, click the **Delete** link for that file.

Read more/less



You will be prompted to confirm your intention to delete the file.

To delete a file from the **Insert document** dialog within icons view, hover over the file then click the garbage can icon.

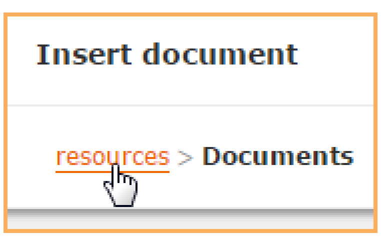


Switching to a different folder

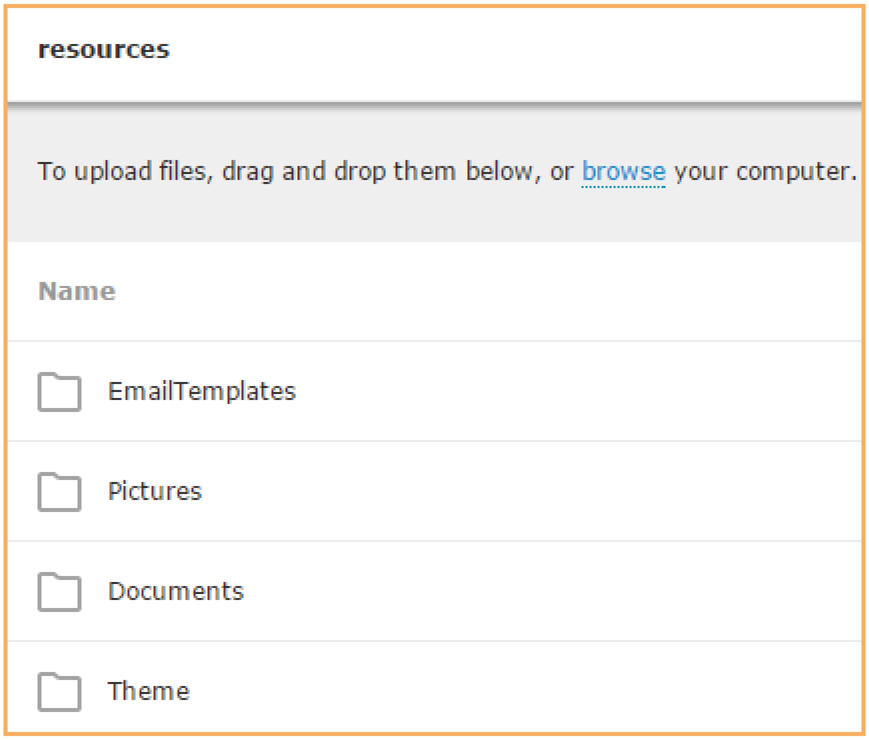
By default, the **Insert document** dialog displays images from the **Documents** folder, which is grouped under the **Resources** folder within your Wild Apricot account. You can select images from – or upload images to – any folder on your on your Wild Account.

Read more/less

To switch to a different folder, click the **Resources** link...



...to display the other folders grouped under the **Resources** folder.

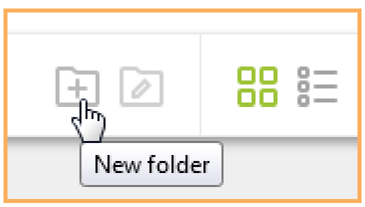


Now, double click on the folder you want to switch to.

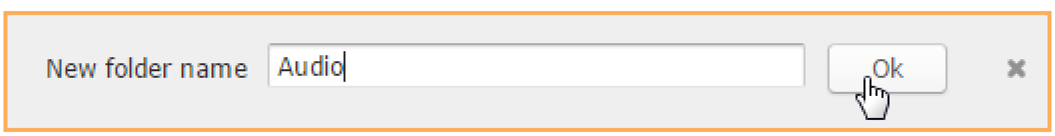
Creating a new folder

You can create a new folder under the current folder. To do so, click the **New folder** icon within the **Insert document** dialog.

Read more/less



You will be prompted to enter a name for the new folder. After doing so, you can click the **OK** button to add the folder or click the **X** button to cancel the addition.

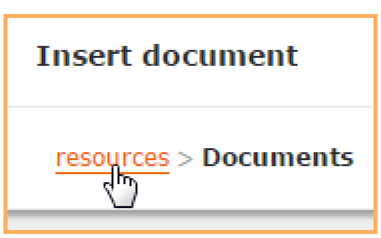


Renaming an existing folder

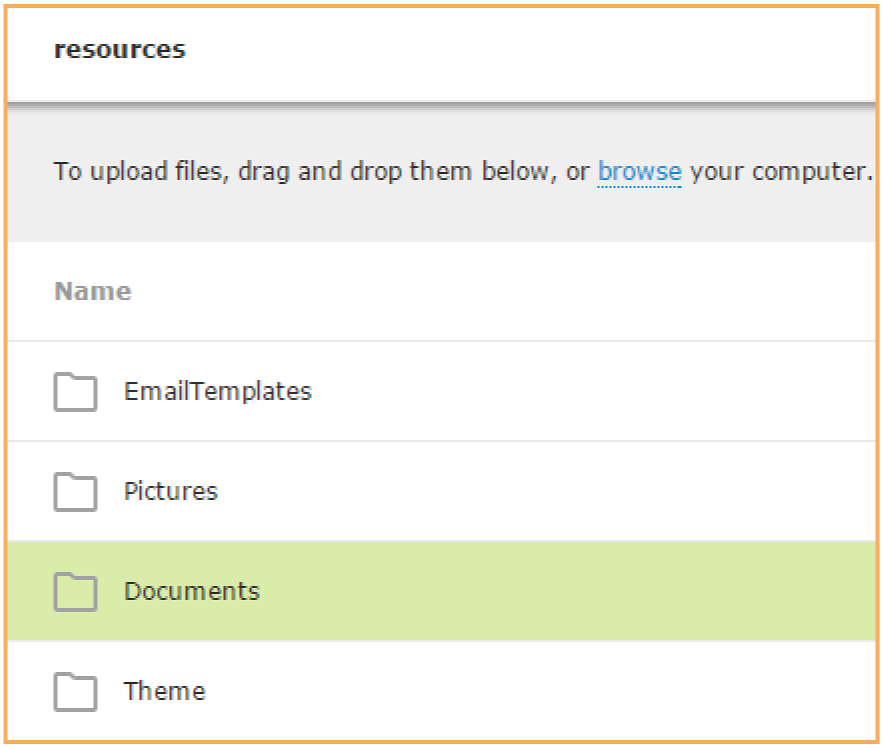
You can rename any of the folders within your Wild Apricot account from the **Insert document** dialog. To do so, follow these steps:

Read more/less

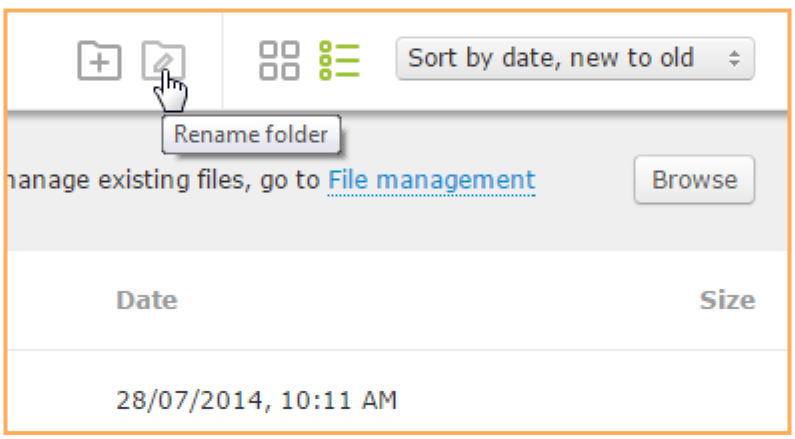
1. Switch to the folder above the folder you want to rename. For example, if you wanted to rename the **Documents** folder, you would click the **Resources** link to display all the folders grouped under the **Resources** folder.



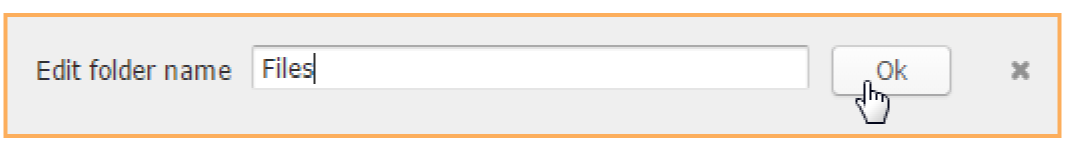
2. Click the folder you want to rename. It will appear highlighted.



3. Click the **Rename folder** icon.



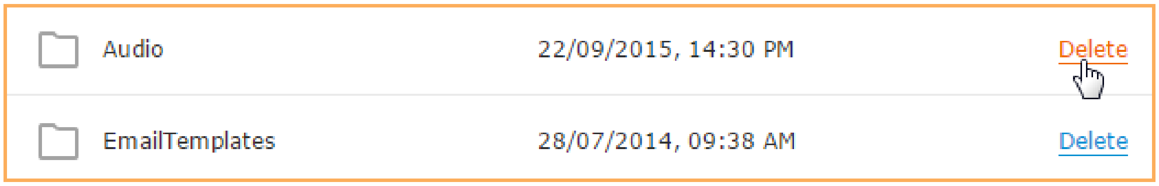
4. Enter a new name for the folder in the field that appears.
5. Click the **OK** button.



Deleting a folder

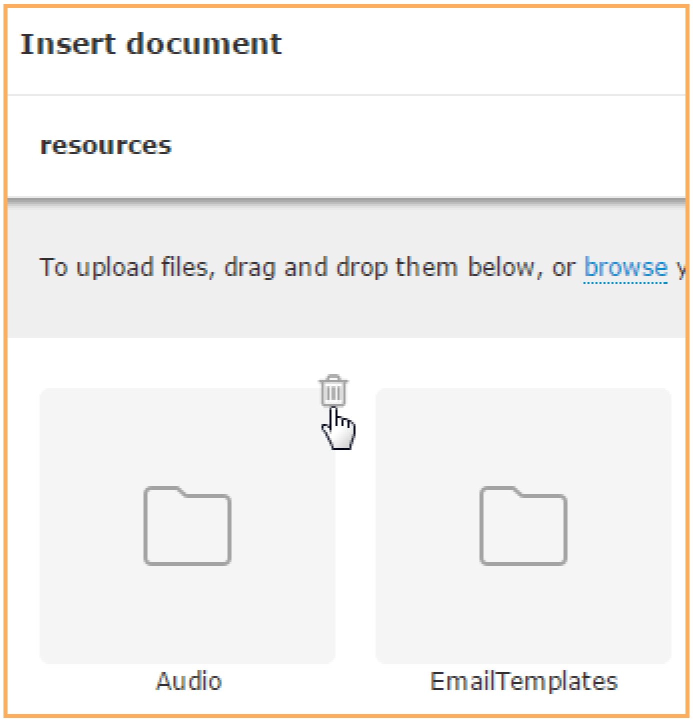
To delete a folder from the **Insert document** dialog within list view, click the **Delete** link for that folder.

Read more/less



You will be prompted to confirm your intention to delete the folder.

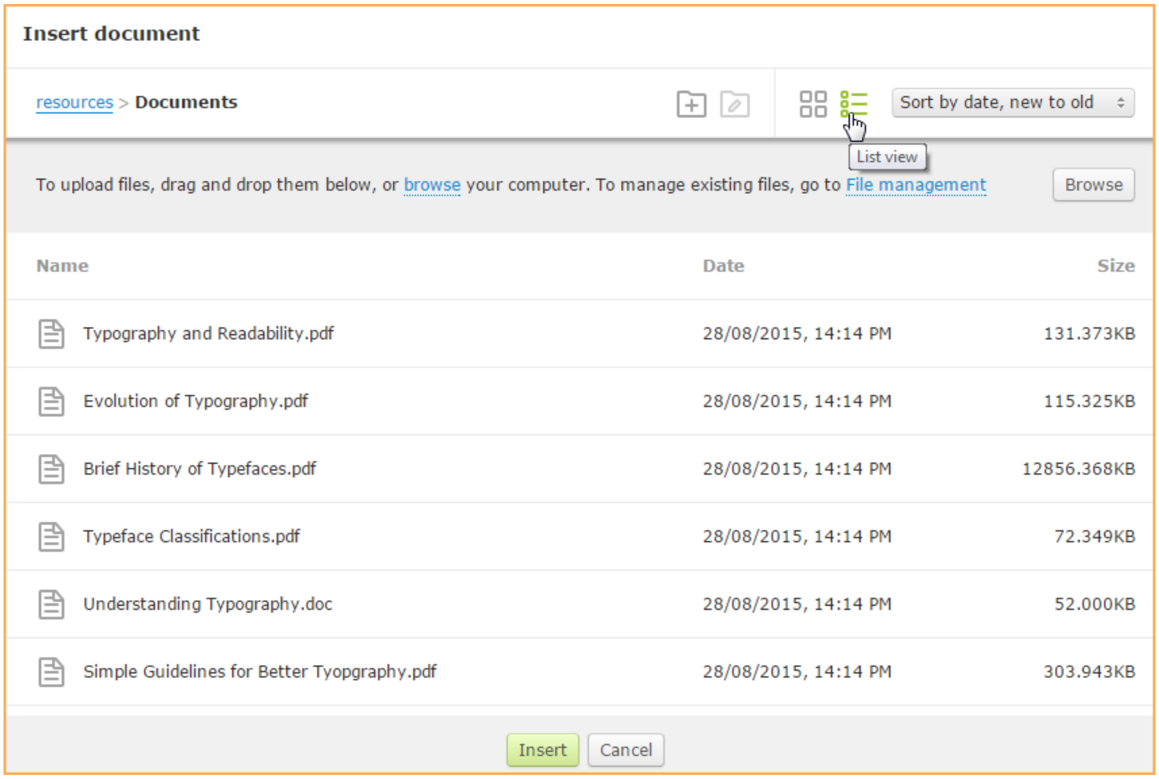
To delete a folder from the **Insert document** dialog within icons view, hover over the folder then click the garbage can icon.



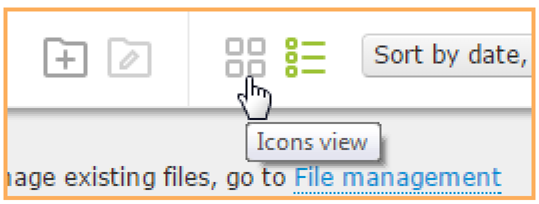
Changing the file view

By default, the **Insert document** dialog displays a list of documents within each folder, along with file details such as date and size. This is called *list view*.

Read more/less



You can switch from list view to *icons view*, which displays icons instead of file details.. To switch to icons view, click the **Icons view** icon in the upper right corner of the **Insert document** dialog.

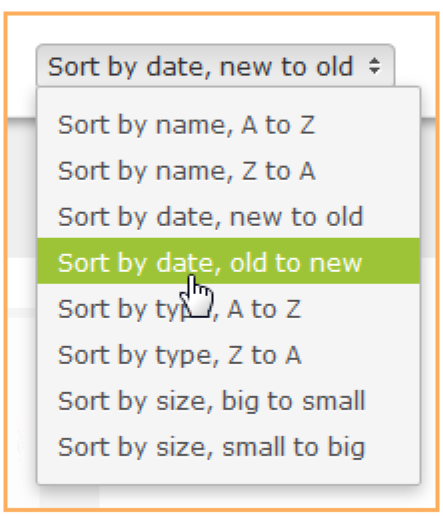


Changing the sorting order

You can change the order in which files are displayed, either in icons view or in list view. You can sort the files by name, date, type (file extension), or size, in ascending or descending order.

Read more/less

To change the sorting order of the files, click the sorting options that appear in the upper right corner of the dialog and choose a different option.



Embedding documents and document viewers

You can embed documents so that they appear directly on a Wild Apricot site page or event description. To do so, you enter code to embed the document.

If you don't want to display the document within the site page or event description, you can link to an external document viewer, so visitors can view the document without downloading it or having the required software to open the document.

Embedding PDF files

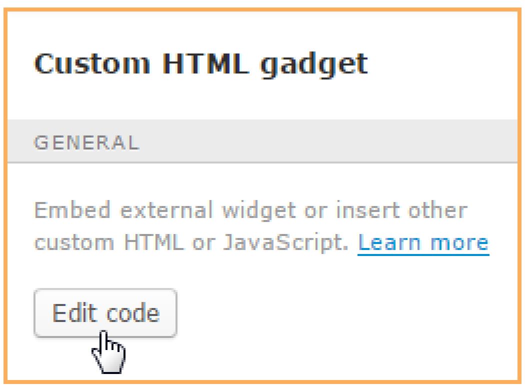
You can embed a PDF file into a Wild Apricot site page or page template, but not in an email or email template. The PDF file can be stored in your Wild Apricot account or on another site.

> The PDF file may appear cut off horizontally on mobile devices.

To insert or embed a PDF file into a Wild Apricot site page, follow these steps:

Read more/less

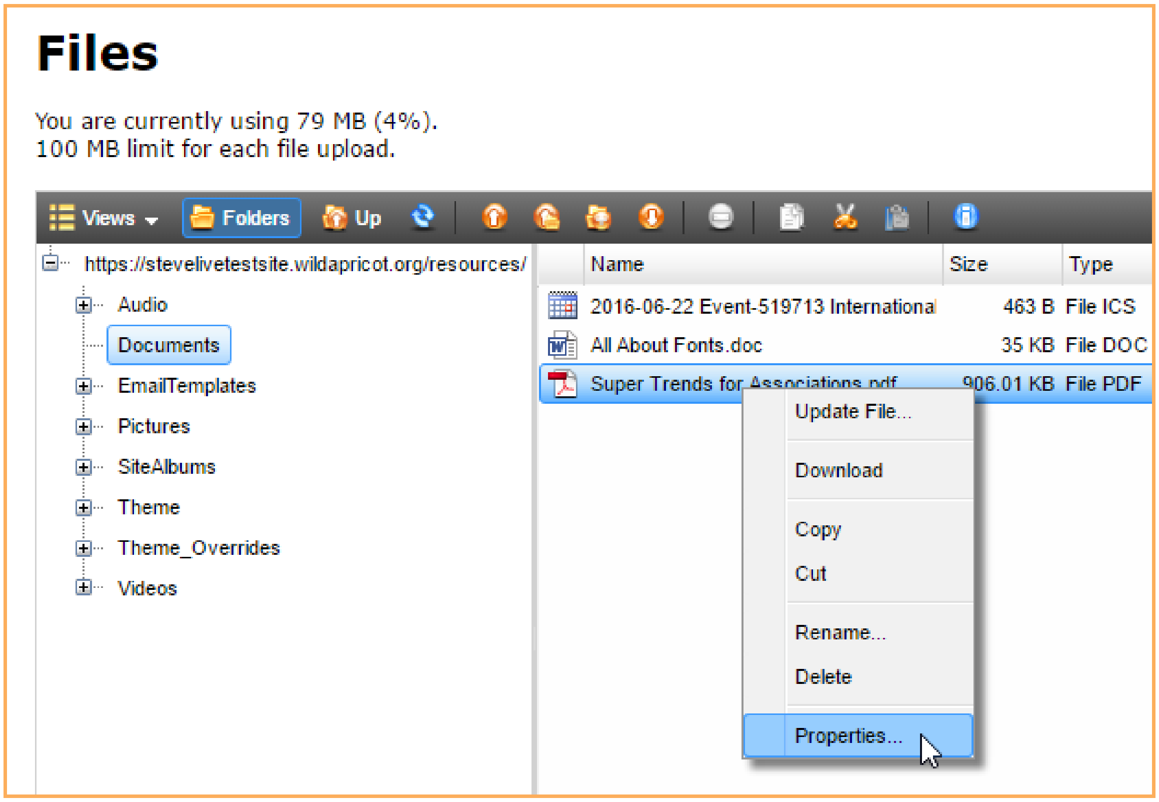
1. In your Wild Apricot account, go to **Sites pages** (under the **Website** menu) and begin editing the site page where you want to insert the PDF.
2. Click the **Gadgets** icon to display the list of available gadgets.
3. Drag the Custom HTML gadget from the **Gadget** list, and drop it on the desired location.
4. After you have inserted the gadget, click the **Edit code** button within the page settings on the left.



5. In the dialog that appears, paste the following code:

```
<iframe src="fileURL" width="100%" height="700"></iframe>
```

and replace *fileURL* with the full URL of the PDF file you want to embed. You can also adjust the *width* and *height* values if you want. If you are embedding a PDF file stored in your Wild Apricot account, you can find its URL by right clicking over the file on the Files screen and selecting **Properties** from the menu that appears.



6. Click the **Save** button to save your code changes.
7. Click the **Save** button to save your changes to the page.

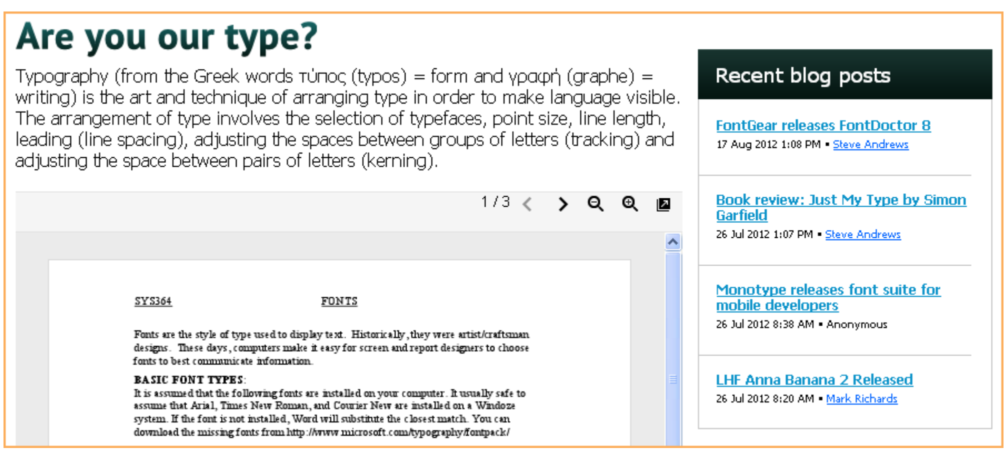
The PDF file should now appear on your site page.

> If your browser cannot display PDF files, the file will be downloaded rather than displayed.

Embedding Google Drive documents

You can embed documents, spreadsheets, and presentations from your Google Drive into a Wild Apricot site page or event description.

Read more/less

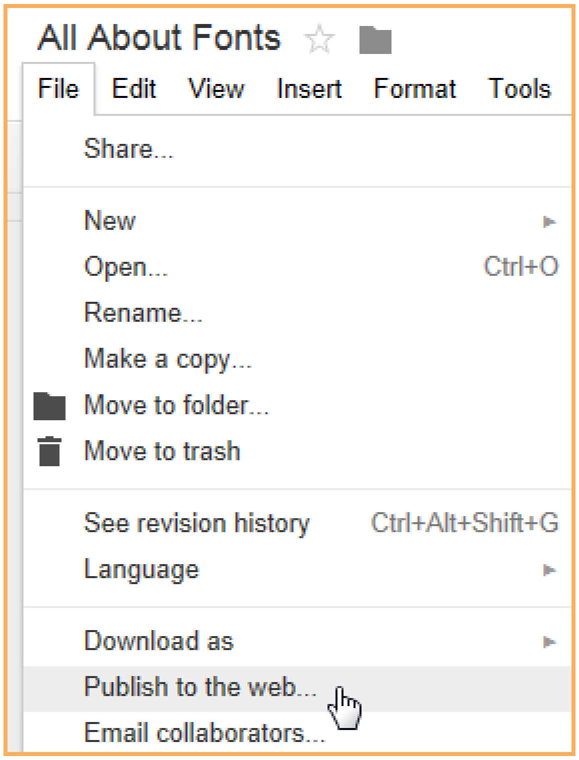


> For support embedding Google Drive documents, please contact Google.

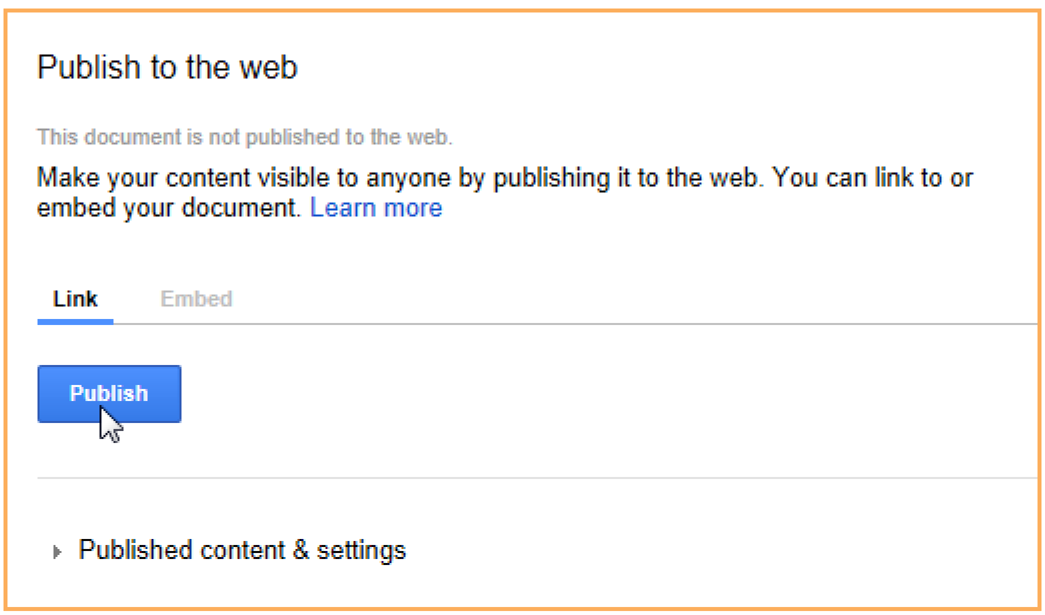
To embed a Google Drive document, spreadsheet, or presentation, follow these steps:

1. Open the document, spreadsheet or presentation within Google Drive.

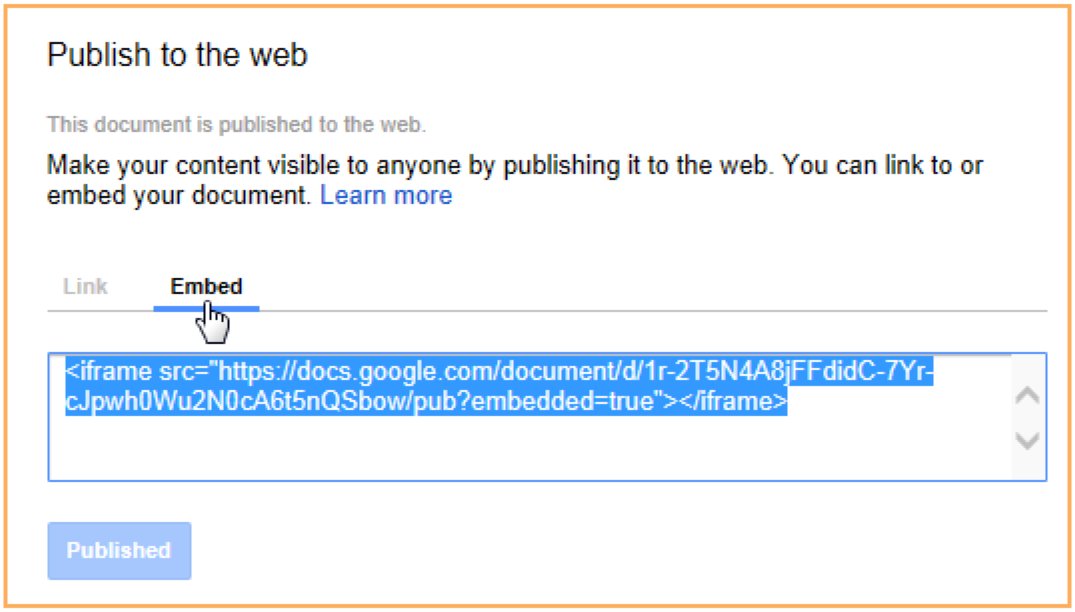
2. Click the **File** menu.
3. Select the **Publish to the web** option.



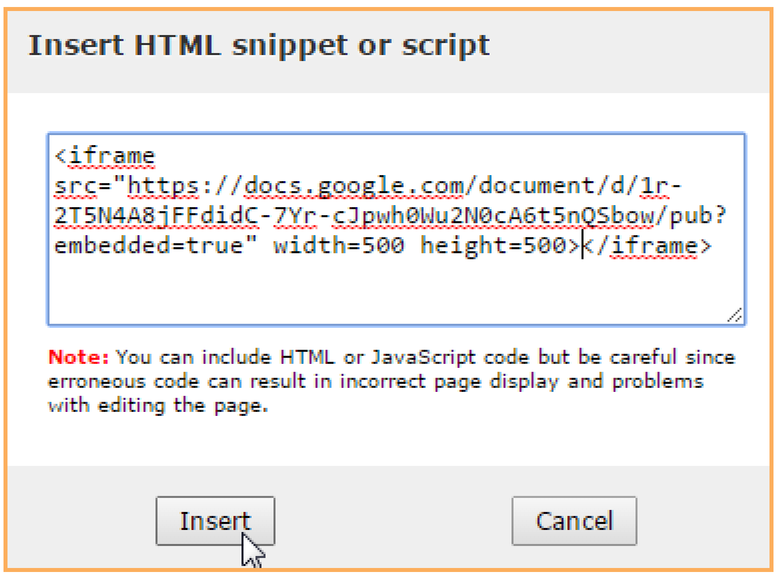
4. Click the **Publish** button.



5. Click the **Embed** tab and copy the embed code.



6. In Wild Apricot, begin editing the site page or event description where you want the document to appear.
7. Click where you want the document to appear, then click the **S (Snippet)** button.
8. In the window that appears, paste the code you copied from the Google site.
9. Within the pasted code, add **width** and **height** parameters to the <iframe> tag and set the values accordingly. In the example below, we've set both the width and the height to 500 pixels.
10. Click the **Insert** button to insert the code into the page.

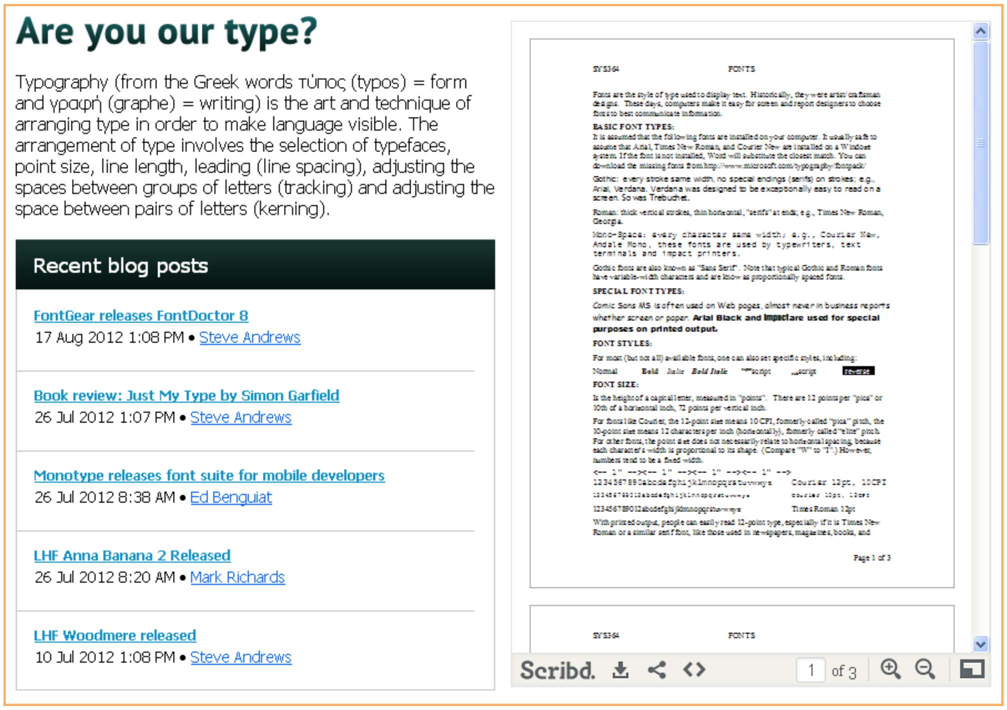


11. Click **Save** to save your changes.

Embedding Scribd documents

If you want to embed documents stored on the Scribd document sharing site, you can insert code to embed the document on a page or event description in your Wild Apricot site.

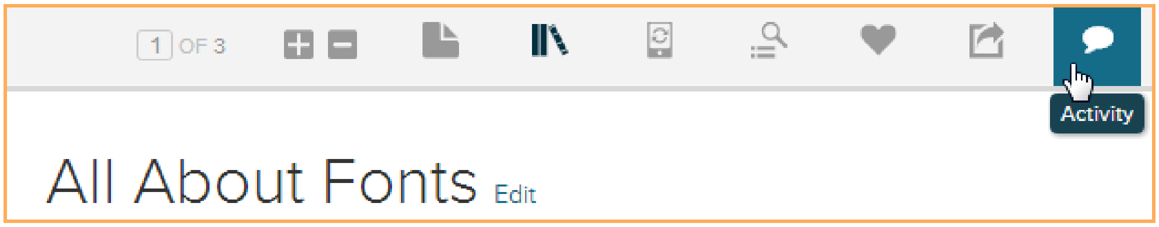
Read more/less



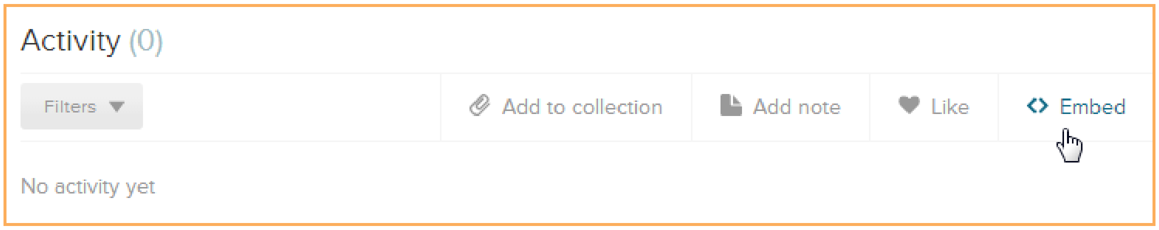
⚠ For support embedding Scribd documents, please contact Scribd.

To embed Scribd documents on your Wild Apricot site, follow these steps:

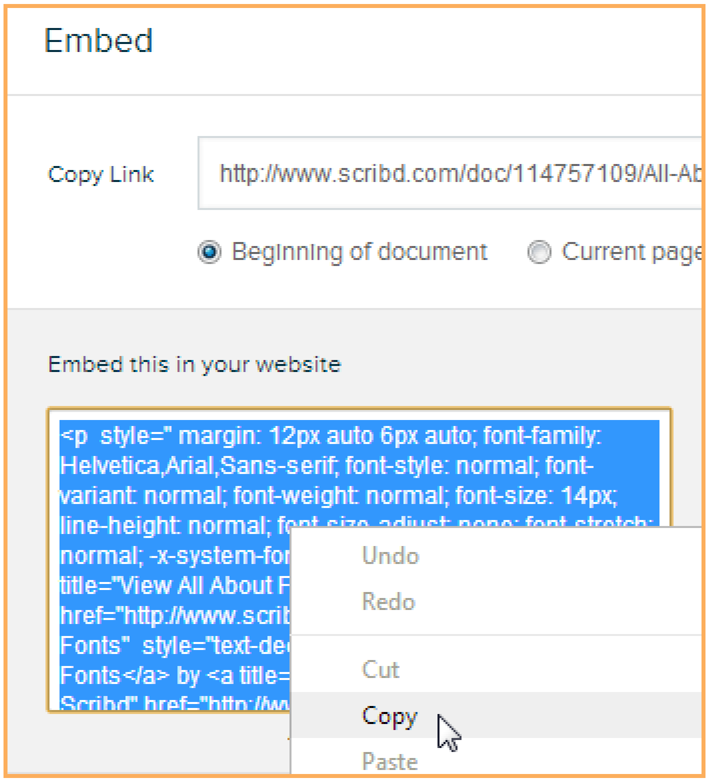
1. Go to www.scribd.com.
2. Display the document you want to embed.
3. Click the **Activity** button.



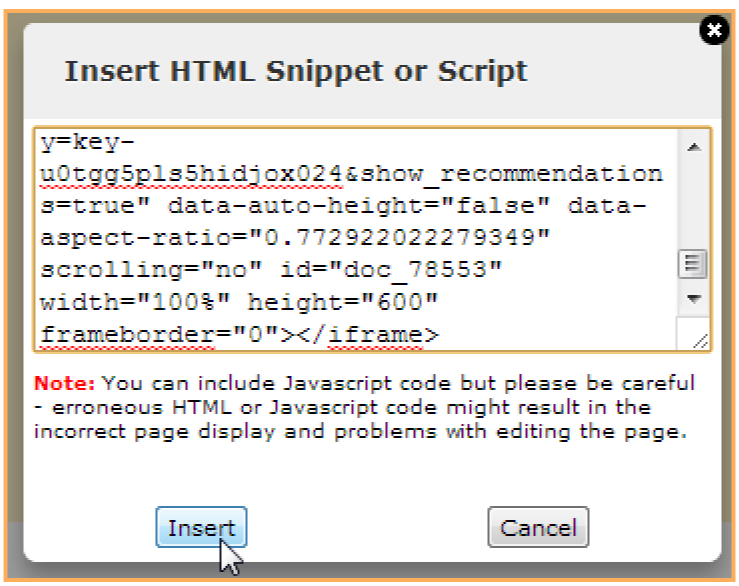
4. Within the Activity window, click the **Embed** button.



5. From the Embed window that appears, review the options, including document size and whether you want to include a link to the document on the Scribd website.
6. Copy the embed code that appears on this window.



7. In Wild Apricot, begin editing the site page or event description where you want the link or document to appear.
8. Click where you want the embedded document to appear, then click the **S (Snippet)** button.
9. In the window that appears, paste the code you copied from the Scribd site.



10. Click the **Insert** button to insert the code into the page.
11. Click **Save** to save your changes.

Troubleshooting

- When opening a Microsoft Office 2007 or 2003 document – Word, Excel, etc. – using Internet Explorer on Windows 7 or Windows Vista, visitors to your site may be asked to enter a user name and password, even if the link appears on a public page. In this case, visitors can simply click **Cancel** and the document will open.

On this page:

See also:

- Inserting links
- Inserting pictures
- File management
- Uploading files in bulk using WebDAV

Inserting and editing tables

Inserting and editing tables

You can insert a table into a page, page template, email, email template, or event description. You can create a regular table, showing information within columns and rows, or you can create tables without borders for advanced page layouts.

Font conversion chart

Points	Pixels	EMS
5	6	.375
6	8	.5
7	9	.563
8	10	.625
9	12	.75
10	13	.813
11	14	.875
12	16	1.0

History
The Association began in 1999 as an effort on the part of typographers from Canada and the United States to combine our talents and share our knowledge.

Mission
Our mission is to promote a greater understanding of typography and work of typographers.

For each table, you can specify the number of rows and columns you want, choose a background color, and set the border width and color. After inserting the table, you click inside the cells and start adding your content.

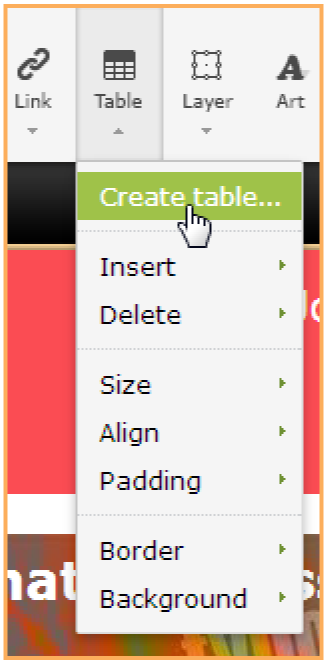
Wild Apricot does not provide an option to merge cells within tables. However, you can access the HTML code from the content editor and manually merge the cells using the instructions provided here.

Inserting a table

To insert a table into a page, page template, email, email template, or event description, follow these steps:

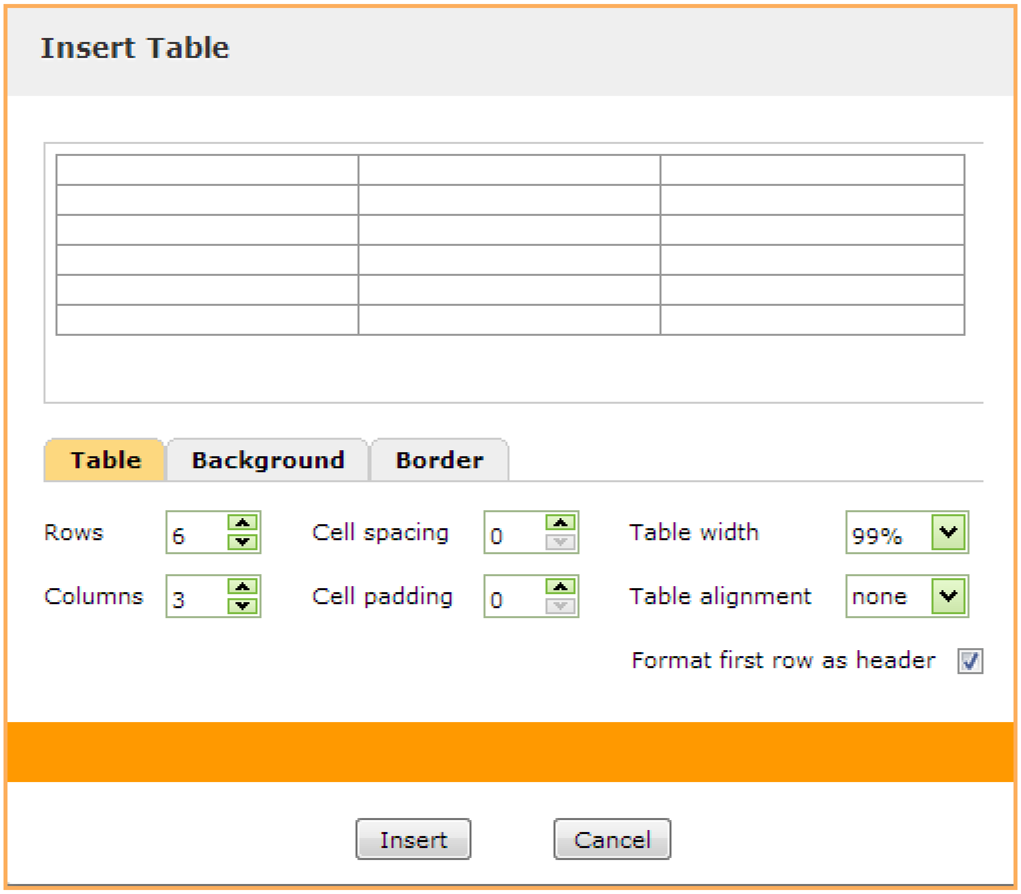
Read more/less

1. Begin editing the site page, page template, email, email template, or event description.
2. Click within the content gadget, email body, or event description where you want the table to appear. The content editor toolbar s hould now appear at the top of the screen.
3. Click the **Table** icon within the content editor toolbar and select the **Create table** option.



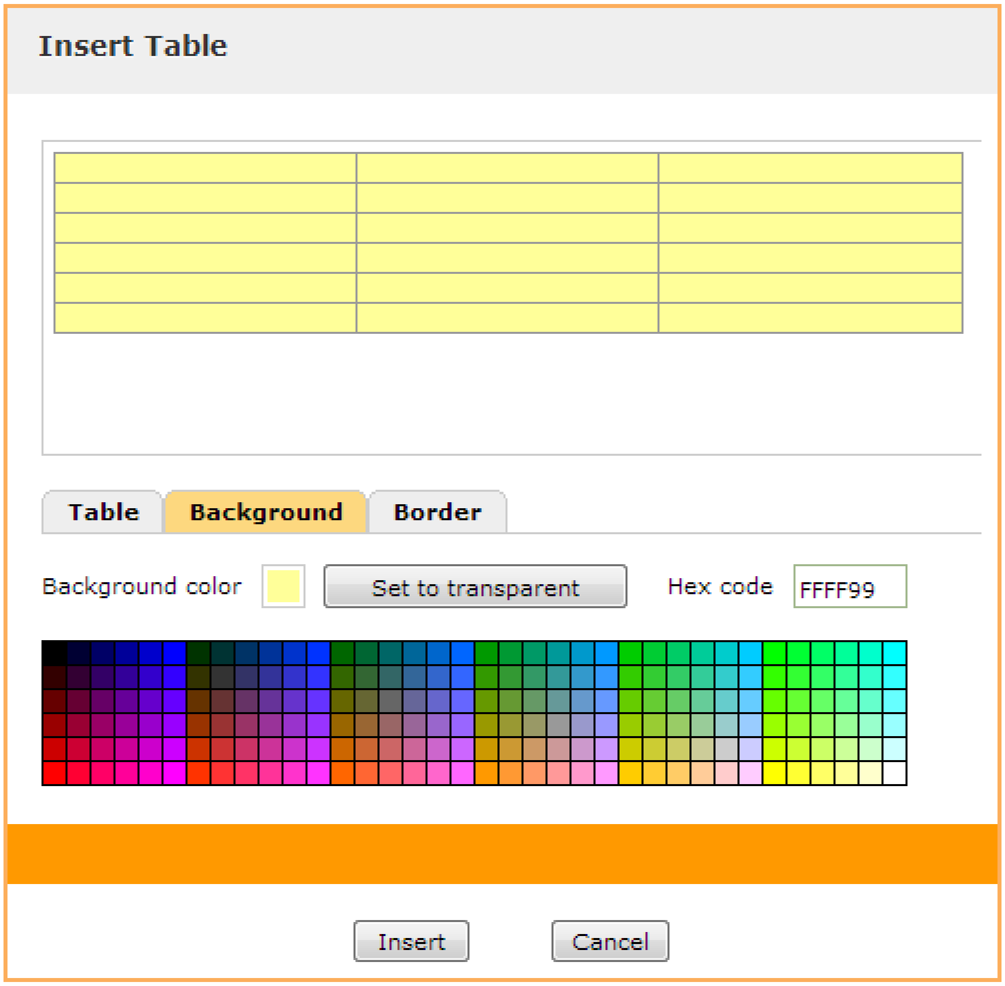
4. On the dialog that appears, you specify the table parameters, including the number of rows and columns, the spacing between tables cells, and the padding (or margin) within each cell. You can also specify the table width – what percentage of the available area it occupies, and the table alignment – whether the table is left or right aligned within the available area. Finally, you can

indicate whether the first row should be specially formatted as column headings.

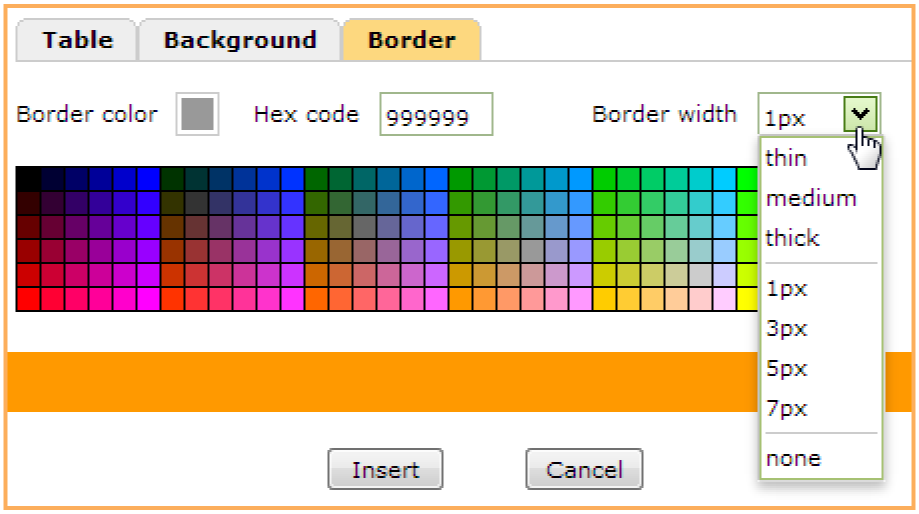


5. Click the **Background** tab and select the background color of the table. You can click a color at the bottom or enter the hex code for the color. To make the background transparent, so that the page background shows through, click the **Set to transparent** but

ton.



6. Click the **Border** tab and set the color of the cell borders within the table. You can click a color at the bottom or enter the hex code for the color. You can also select the cell border width. To remove the cell borders completely – and make the table invisible – set the **Border width** to **None**.



7. Click the **Insert** button to insert your table.

Now, you can click within the table cells on the page and start entering text or adding other content.

Modifying a table

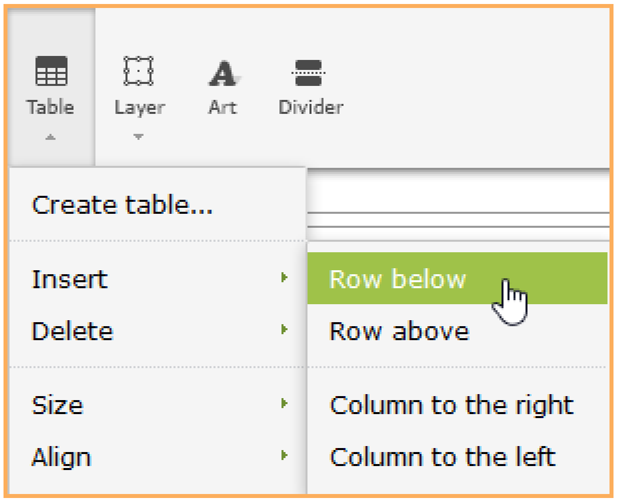
After you have inserted a table, you can add and remove rows and columns, and change several table parameters.

Adding rows and columns

To add a row or column to an existing table, follow these steps:

Read more/less

1. Click within a table cell, above, below, or beside where you want the new row or column to appear.
2. Click the **Table** icon within the content editor toolbar and select one of the **Insert** options.

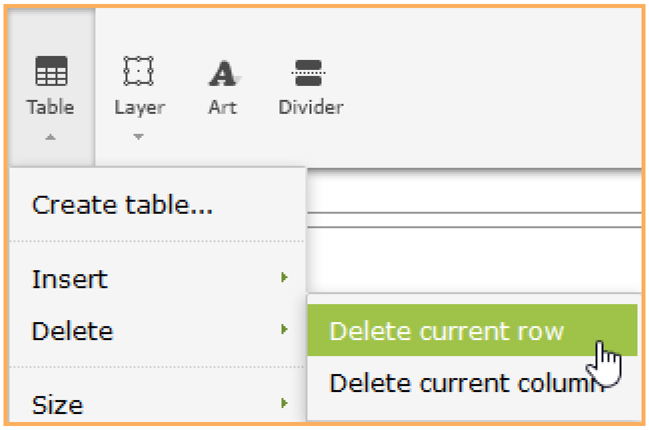


Removing rows and columns

To remove a row or column from an existing table, follow these steps:

Read more/less

1. Click within a cell within the row or column you want to remove.
2. Click the **Table** icon within the toolbar and select one of the **Delete** options.



Changing table parameters

To change the parameters for an existing table, follow these steps:

Read more/less

1. Click within any cell in the table. If you want to modify parameters for a single row or column, click a cell within the row or column.
2. Click the **Table** icon and select one of the following options.

Menu	Option	Description

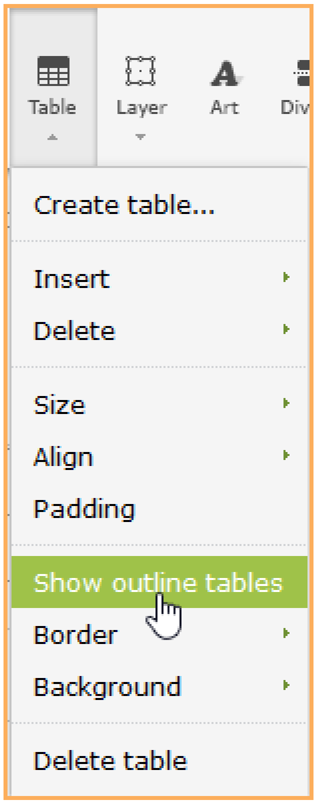
Size	Table width	Width of the table. You can choose from predefined widths – in pixels or as a percentage of the screen width – let the width being automatically determined by the table content (Auto), or click **More...** to set a specific table width.
	Table height	Height of the table. You can choose from predefined heights (in pixels), let the height being automatically determined by the table content (Auto), or click **More...** to set a specific table height.
	Row height	Height of the currently selected row. You can choose from predefined heights (in pixels), let the height being automatically determined by the row content (Auto), or click **More...** to set a specific row height.
	Column width	Width of the currently selected column. You can choose from predefined widths – in pixels or as a percentage of the screen width – let the width being automatically determined by the column content (Auto), or click **More...** to set a specific column width.
Align	Table alignment	Horizontal alignment of the entire table.
	Row horizontal align	Horizontal alignment of the currently selected row.
	Row vertical align	Vertical alignment of the currently selected row.
	Column horizontal align	Horizontal alignment of the currently selected column.
	Column vertical align	Vertical alignment of the currently selected column.
	Cell horizontal align	Horizontal alignment of the currently selected cell.
	Cell vertical align	Vertical alignment of the currently selected cell.
Padding		The padding within table cells (in pixels). Padding is the distance between the cell content and the cell border.

Border	Table border width	The width of the table border. You can choose from predefined widths, set the width to none, or click **More...** t o set a specific border width.
	Table border color	Color of the table border. You can click a color at the bottom or enter the hex code for the color.
	Row border width	The width of the border for the currently selected row. You can choose from predefined widths, set the width to none, or click **More...** to set a specific border width.
	Row border color	Color of the border for the currently selected row.
	Column border width	The width of the border for the currently selected column. You can choose from predefined widths, set the width to none, or click **More...** to set a specific border width.
	Column border color	Color of the border for the currently selected column.
	Cell border width	The width of the border for the currently selected cell. You can choose from predefined widths, set the width to none, or click **More...** to set a specific border width.
	Cell border color	Color of the border for the currently selected cell.
Background	Row background color	Background color of the currently selected row. You can click a color at the bottom or enter the hex code for the color. To make the background transparent, so that the page background shows through, click the **Set to transparent** b utton.
	Column background color	Background color of the currently selected column.
	Cell background color	Background color of the currently selected cell.

Viewing invisible tables

To view the borders of invisible tables – tables with the **Border width** set to **None** – click within the table then click the **Table** icon and select the **Show outline tables** option.

Read more/less



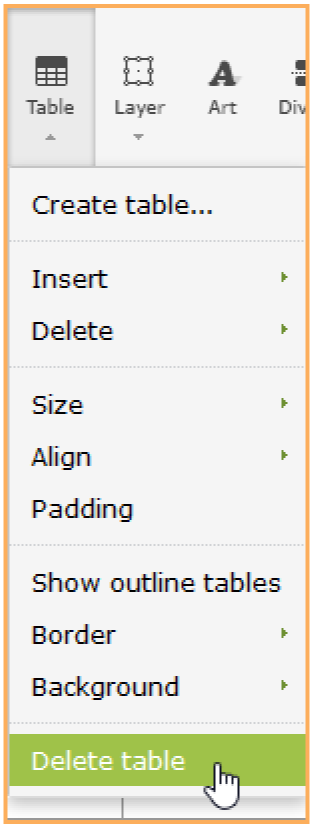
To hide the borders of invisible tables, select the **Hide outline tables** option.

Deleting a table

To remove a table, follow these steps:

Read more/less

1. Click with any cell in the table.
2. Click the **Table** icon and select the **Delete table** option.



On this page:

- Inserting a table
- Modifying a table
- Viewing invisible tables
- Deleting a table

Expand all sections

Pasting content from other sources

Pasting content from other sources

To paste content copied from another source – such as Microsoft Word, Google Docs, Apple's Pages, a website, or an email – click where you want the content to appear then click the **Paste** icon within the content editor.

⚠ On browsers other than Internet Explorer, you may be prompted to use keyboard shortcuts instead of the Paste icon to paste your text.

You can paste content into a content gadget, email body, event description, blog post, or forum topic.

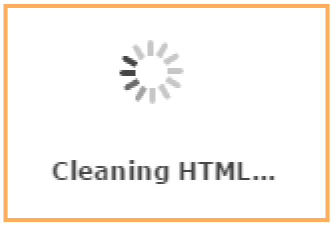
What gets pasted?

You can paste both text and graphics from other sources. When pasting formatted text, the content editor will try to preserve as much of the formatting as possible, but will discard any incompatible formatting – formatting that it cannot reproduce itself.

Read more/less

For example, some table formatting and text alignment options available in Microsoft Word may not be available in Wild Apricot's content editor, and will be discarded when pasting. For a list of supported formatting code, see Pasting cleanup rules (below).

While the editor is processing the pasted content, the following message will appear:



Whether graphical images are pasted along with the text depends on the source from which you copied the content. When pasting from sources that store images using URLs – such as Google Docs, web pages, and emails – any images included in the content will get pasted. When pasting from other sources – such as Microsoft Word – images will be discarded.

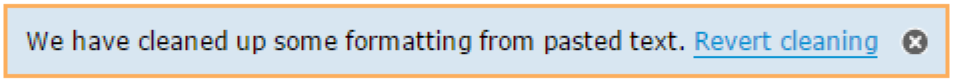
To modify the settings of the pasted images, you cannot use the Settings dialog as you would when modifying a picture inserted directly through the content editor. Instead, you must click the HTML button within the content editor and modify the HTML code.

Pasting cleanup options

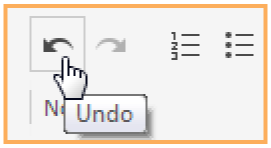
The current process for cleaning up pasted content replaces a process that retained more formatting but resulted in messier and less stable HTML code that could cause the content editor to freeze or otherwise malfunction, and result in inconsistent behavior on different browsers.

Read more/less

To accommodate those who might prefer the previous process, pasting formatted content is actually a two-step procedure, in which the content is pasted using the previous process then immediately replaced by content pasted using the new process. To take advantage of the old pasting process, you can either click the **Revert cleaning** option that appears...



...or click the Undo icon within the content editor toolbar.



Clearing formatting

To clear all character formatting – formatting applied directly to text, rather than through text styles – select the text you wanted cleared, then click the **Clear formatting** icon within the content editor.

Pasting text without formatting

To completely avoid introducing formatting issues, we suggest that you paste only clean text – text without formatting. To paste text without formatting, use the Ctrl + Shift + V shortcut on Windows, and the Command + Shift + V shortcut on a Mac.

Pasting cleanup rules

The following is a list of formatting tags, attributes, and styles supported by the content editor, which are therefore retained by the new process for cleaning up incompatible formatting.

Read more/less

Supported tags

The following HTML tags are supported; all other tags are removed.

P	UL	TH	EM
H1	OL	TD	I
H2	LI	A	U
H3	TABLE	IMG	S
H4	THEAD	BR	STRIKE
H5	TBODY	SPAN	SUP
H6	TFOOT	STRONG	SUB
BLOCKQUOTE	TR	B	FONT

Supported attributes

The following combinations of attribute, tag, and value are supported; all other combinations are removed.

Attribute	Tags	Value	Notes
face	FONT	Any	
color	FONT	#, A-F and 0-9 or color name	
align	P, H1-H6, TD	left, center, right, justify	
align	IMG	left, right	
valign	TD	top, middle, bottom	
width	IMG, TABLE, TH, TD	Digits and can be px or % at the end of the line	
height	IMG, TABLE, TH, TD	Digits and can be px or % at the end of the line	
alt	IMG	Any	
title	IMG, A	Any	
src	IMG	Any	
href	A	Any	
name	A	Any	
border	IMG, TABLE	Digits and can be px at the end of the line	For table converted to style border on tags TABLE and TH/TD
bordercolor	TABLE	#, A-F and 0-9 or color name	Converted to style border on tags TABLE and TH/TD
cellspacing	TABLE	Digits and can be px at the end of the line	
cellpadding	TABLE	Digits and can be px at the end of the line	
bgcolor	TABLE	#, A-F and 0-9 or color name	

Supported styles

The following combinations of style, tag, and value are supported; all other combinations are removed.

Rule	Tags	Value
border-width	TABLE, TH, TD	Digits and px at the end of the line
border-style	TABLE, TH, TD	solid
border-color	TABLE, TH, TD	Valid CSS color
border-collapse	TABLE	collapse
font-size	FONT	Digits and px at the end of the line
background-color	TH, TD, FONT, SPAN	Valid CSS color

Styles to tags conversion

The following combinations of CSS rule and value are converted to the following HTML tags.

Rule	Value	Tag
font-weight	bold	strong
font-style	italic	em
font-size	Digits and px/pt at the end of the line	font
color	Valid CSS color	font
font-family	Any	font
text-decoration	underline	u
text-decoration	line-through	strike
vertical-align	sub	sub
vertical-align	super	sup

Other rules

- Empty occurrences of P, H1, H2, H3, H4, H5, H6, BLOCKQUOTE, A, SPAN, STRONG, B, EM, I, U, S, STRIKE, SUP, SUB, and FONT tags will be removed.
- Multiple nested tags FONT will be merged into one.

On this page:

Expand all sections

Inserting and modifying HTML or JavaScript

Inserting and modifying HTML or JavaScript

You can insert custom HTML or JavaScript into a custom HTML gadget or as a *snippet* into a content gadget on a page or page template. Inserting code as a snippet combines the code with the rest of the content gadget code, while inserting code as a custom HTML gadget keeps the code separate and makes it more easily relocated. You can also insert custom HTML as a snippet into an email, email template, or event description.

You might want to insert custom code to embed an audio or video clip, or to embed a third-party widget from Google or Twitter.

You can also add JavaScript code and apply it to all the pages on your site.

As well, you can display the HTML for any content gadget, email, or event description, and modify it as you wish (subject to code restrictions).

> ⚠ Be careful when inserting HTML or JavaScript code since erroneous code can result in incorrect page display and problems with editing the page.

Inserting a custom HTML gadget

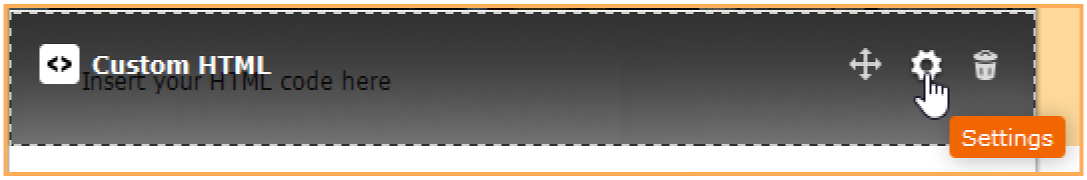
A custom HTML gadget executes custom HTML or JavaScript code and can be easily moved to a different location on a page or page template. To insert a custom HTML gadget, follow these steps:

Read more/less

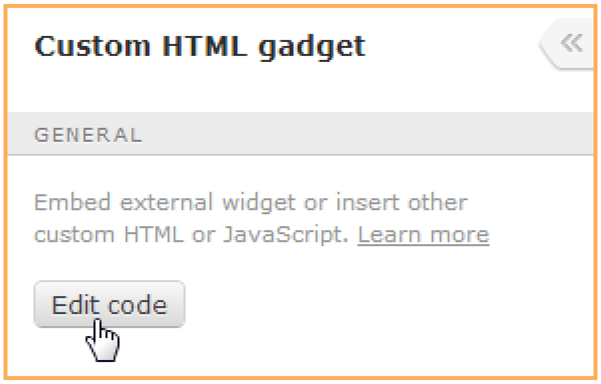
1. Go to **Sites pages** (under the **Website** menu) and begin editing the site page or page template.
2. Click the **Gadget** list to display the list of available gadgets.
3. Drag the custom HTML gadget from the Gadget list, and drop it on the desired location.

When a layout section or placeholder is empty, a **Drop gadget or layout here** prompt will be displayed. When you drag a gadget over an empty layout section or placeholder, it turns green, indicating that you can drop the gadget there. When you drag a gadget above or below a layout, a prompt will appear indicating that you can drop the gadget before or after the layout.

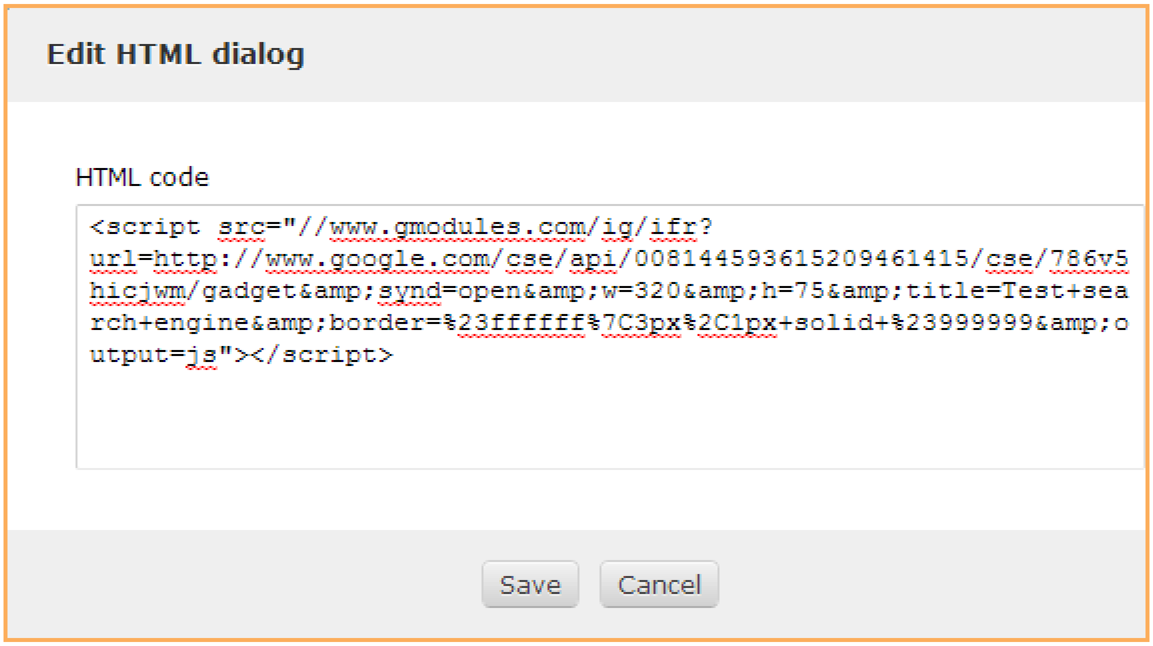
4. After you have inserted the gadget, hover over the gadget and click the **Settings** icon.



5. Within the gadget settings on the left, click the **Edit code** button.



6. In the dialog that appears, enter your HTML or JavaScript code then click the **Save** button. Make sure your code does not violate any of the code restrictions (below).



7. Click the **Save** button to save your changes to the page.

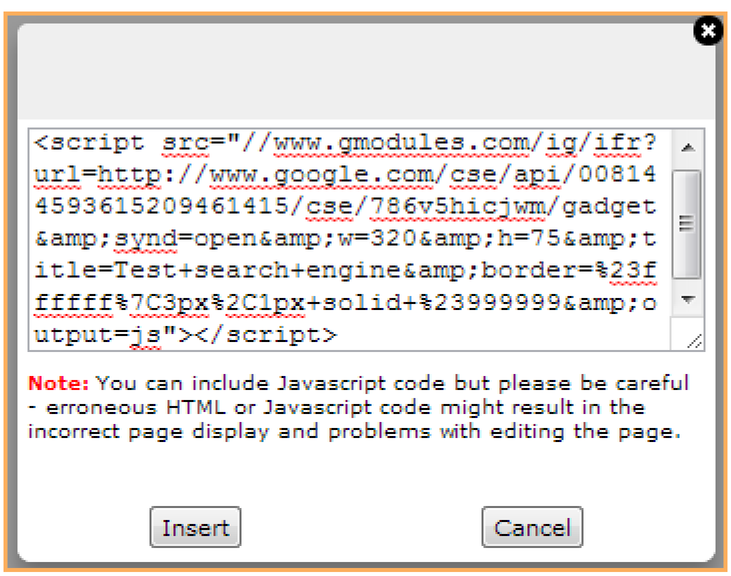
Inserting custom code into a content gadget, email, blog post, or event description

To insert HTML or JavaScript code in a content gadget on a Wild Apricot page or page template, or in an email, email template, blog post, or event description, follow these steps:

Read more/less

1. Begin editing the site page, page template, email, email template, or event description.
2. Click within the content gadget, email body, or event description where you want to insert your code.
3. Click the **S (Snippet)** button within the toolbar towards the top of the screen.

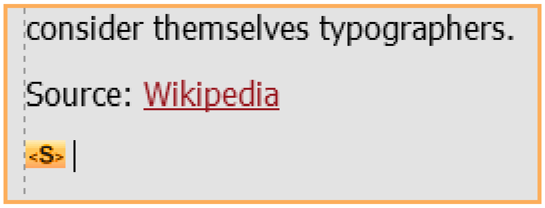
4. Within the code box, enter the HTML or JavaScript code. Make sure your code does not violate any of the code restrictions (below).



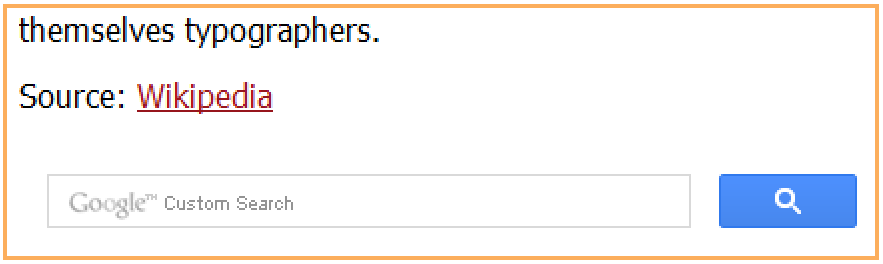
5. Click **Insert** to exit the window.

6. Click **Save** to save changes to the page.

In some cases, the element to be displayed by the code will be represented in edit mode by a snippet icon.



Once you switch to public view, the icon will be replaced by whatever your code is meant to display (in this case, a Google search bar).

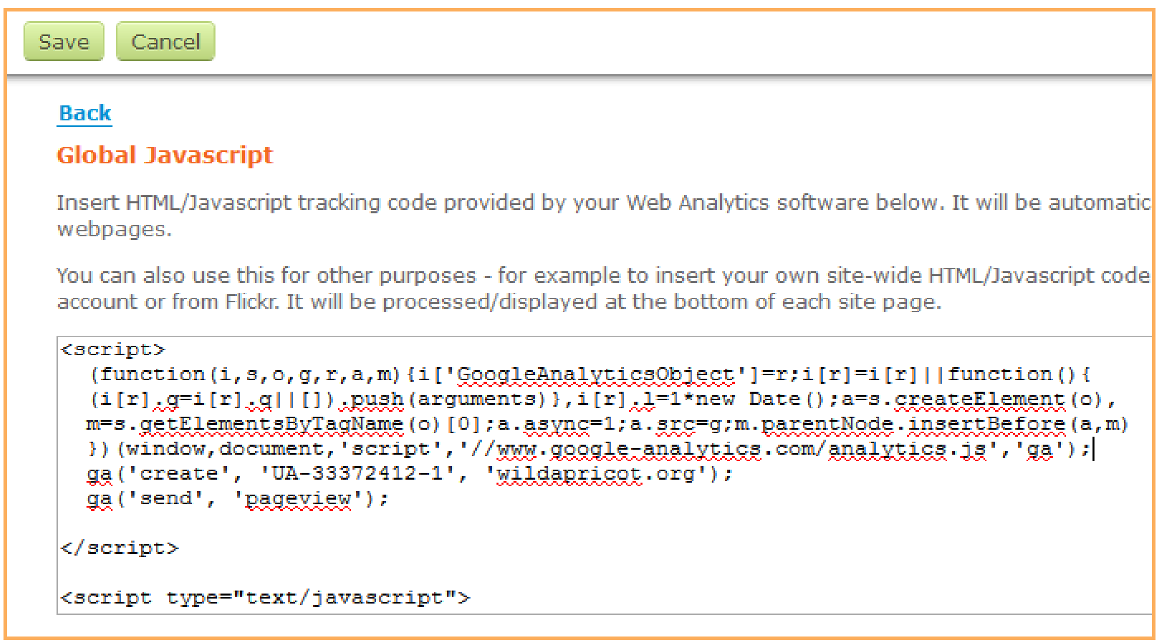


Inserting global JavaScript

If you want to add some JavaScript code to all the pages on your Wild Apricot site, and all pages you create in the future, go to **Settings** then click **Global JavaScript** (under **Site settings**). In the code box, enter your JavaScript.

Read more/less

You could, for example, add JavaScript code to use Google Analytics to track traffic to your Wild Apricot site. You can add multiple scripts, one after the other.



If you're including comments in your code, you need to format them differently depending on where they appear. If your comment is outside a script tag, enclose the comment within <!-- and -->. For example:

```
<!-- If you're inserting a comment OUTSIDE of your script tags, it needs to look
like this -->
<script type="text/javascript">
```

If your comment is within a <script> tag, then your comment should begin with // . For example:

```
<script type="text/javascript">
// However, if you're inserting a comment INSIDE of your script tags, it needs to
look like this
jq$(document).ready(function(){
    jq$("#FunctionalBlock1_ctl00_subscribeButton").attr('value', 'Subscribe
Today');
});
</script>
```

Modifying the HTML code

If you want to view or modify the HTML code for a content gadget, page template, email, email template, or event description, follow these steps:

Read more/less

1. Begin editing the site page, page template, email, email template, or event description.
2. Click within the content gadget, email body, or event description where you want to view or modify the code.
3. Click the **HTML** icon within the toolbar.

4. Adjust the code as required then click **Save** to save your changes.

5. Click the **Save** button to save your changes.

If you are frequently editing your site's HTML, you might want to use a dedicated HTML editor to make your changes then copy and paste the code back into Wild Apricot.

Coding considerations

- If you fail to close certain HTML tags, your page can become inaccessible. The tags you must close include the following:
    - <!--
    - <IFRAME>
    - <SCRIPT>
    - <APPLET>
    - <NOEMBED>
    - <NOFRAMES>
    - <NOSCRIPT>
    - <TEXTAREA>
    - <XMP>
    - <OBJECT>
    - <MARQUEE>
- Do not use the <PLAINTEXT> tag. If you do, it will be automatically removed from your code.
- Do **not** include any of the following commands within your custom code:
    - document.write()
    - document.writeln()
    - document.open()
    - object.write()
    - object.writeln()
    - object.open()

where *object* is the name of a target object.

On this page:

Expand all sections

See also:

- Extending your website with third-party tools

Page headers and footers

Page headers and footers

Prior to Version 5 of Wild Apricot, page headers and footers were designed separately from the pages on which they appeared, and were applied uniformly to all pages on the site. Starting with Version 5, page headers and footers can be added to page templates, which form the basis of individual pages. Since different page templates can be applied to different pages, page headers and footers can appear differently on different pages.

Page headers and footers can also be added directly to pages that are based on templates without predefined header and footer content.

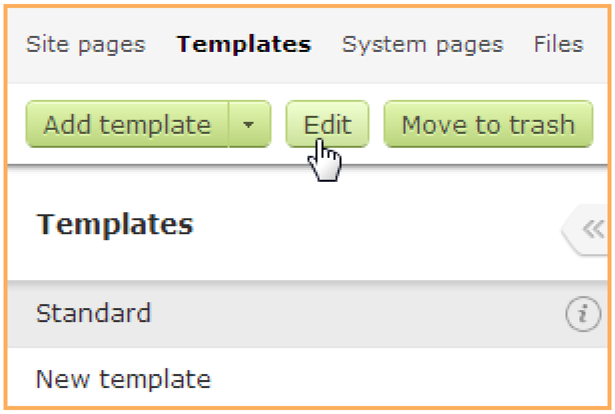
Modifying the page header

Within a page template, the page header is simply the content that appears at the top of the template and thereby, the top of each page that is based on it.

To modify the page header within a page template, follow these steps:

Read more/less

1. Click the **Page templates** option under the **Website** menu.
2. Within the list of templates on the left, click the template you want to modify. The selected template will appear on the right.
3. Click the **Edit** button.



4. To add elements to the page header, click the **Gadgets** button, then drag and drop a gadget from the list into layout cells or placeholders at the top of the template, or above or below existing layouts and gadgets. If you want to add text and graphics, use a content gadget.

Placeholders define the areas within a page template where layouts and gadgets can appear. A layout can be used to divide a page in sections consisting of multiple columns.

5. To delete an existing gadget within a page header, position your pointer over the gadget then click the Trash icon.

6. To move a gadget, position your pointer over the gadget, then drag the Move icon to the new location.

7. To modify dynamic gadgets, like menu gadgets and login gadgets, hover over the gadget and click the Settings icon. From the gadget settings, you can control the appearance and behavior of the gadget.

8. To modify content gadgets – displaying custom content such as text, graphics, etc. – position your pointer over a content gadget then click anywhere within the gadget.

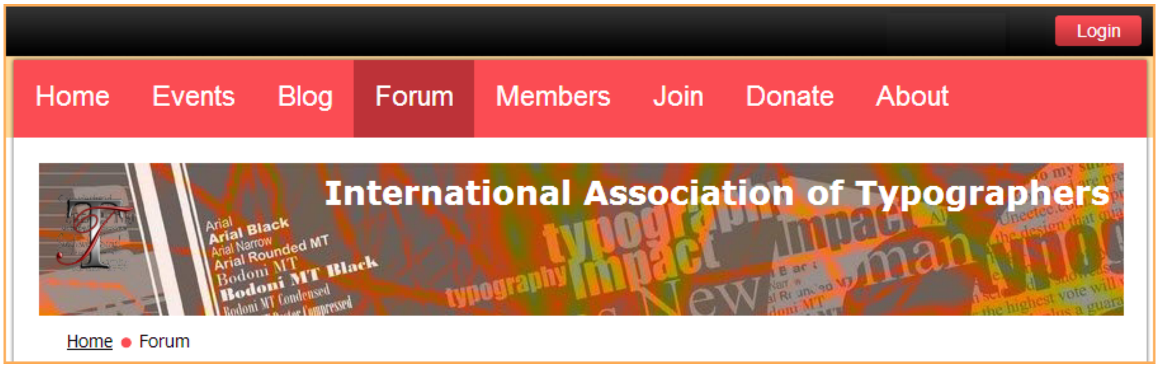
9. Using the content editor that appears, you can add or modify the content within the content gadget.
10. Once you are finished modifying the page template, click **Save**. Any changes made to a template are automatically applied to all pages that are based on that template.

If you want a gadget to appear on top of your logo graphic – a log in gadget, for example – you should add a layout, then set the background image of the layout to your logo, and add the gadget to a cell within the layout. Whether you add a one-column or two-column layout might depend on where you want the log in gadget to appear within the layout.

Designing a page header

Page headers typically consist of a menu, an organization logo, and maybe a graphic. You might want to include breadcrumbs that indicate the visitor's current position within your site's menu hierarchy. You may also choose to include a log in form or log in button within the page header, or maybe you'd prefer to see it within the body of the page.

Read more/less



You might even want to add an animated slideshow to your page header.

To add these elements to a page header within a page template, insert the following gadgets into layout cells or placeholders at the top of the template:

To add...	Insert...	Details
Menu	Menu gadget	Depending on the current website theme, the menu may be vertical or horizontal. You can control the order of menu options from the Site pages screen, and control whether a page appears in the menu from its page settings. Within the menu gadget settings, you can choose whether to include all menu pages, only pages at the top level of the menu hierarchy, or only subpages of the currently displayed page.
Logo, banner	Content gadget	You can combine text, pictures, and other content. You can format the text, using local formatting or text styles, or use ArtText to create stylized text with special effects such as drop shadows. You can layer and overlap content so that text can appear on top of a picture, for example. You can also overlay text on a graphic by setting the graphic as the background image for the content gadget as part of the gadget's settings.
Breadcrumbs	Breadcrumbs gadget	Each page in the menu hierarchy is displayed as a link that the visitor can use to jump up to a higher level page. The style of the links and the current page name is defined separately for each theme, and can be modified from the Colors and styles screen.

Log in form or button	Log in form gadget or Log in button gadget	As part of log in gadget settings, you can choose whether you want the page preview to display the log in form as if the user is logged in or not logged in.
Animated slideshow	Slideshow gadget	You can display images from a folder on the Files screen or from a photo album gadget on your site.

Modifying the page footer

Within a page template, the page footer is simply the content that appears at the bottom of the template and thereby, the bottom of each page that is based on it.

To modify the page footer within a page template, follow these steps:

Read more/less

1. Click the **Page templates** option under the **Website** menu.
2. Within the list of templates on the left, click the template you want to modify. The selected template will appear on the right.
3. Click the **Edit** button.
4. To add elements to the page footer, click the **Gadgets** button, then drag and drop a gadget from the list into layout cells or placeholders at the top of the template, or above or below existing layouts and gadgets. If you want to add text and graphics, use a content gadget. Placeholders define the areas within a page template where layouts and gadgets can appear. A layout can be used to divide a page in sections consisting of multiple columns.
5. To delete an existing gadget within a page footer, position your pointer over the gadget then click the Trash icon.
6. To move a gadget, position your pointer over the gadget, then drag the Move icon to the new location.
7. To modify dynamic gadgets, like menu gadgets and login gadgets, hover over the gadget and click the Settings icon. From the gadget settings, you can control the appearance and behavior of the gadget.
8. To modify content gadgets – displaying custom content such as text, graphics, etc. – position your pointer over a content gadget then click anywhere within the gadget.
9. Using the content editor that appears, you can add or modify the content within the content gadget.
10. Once you are finished modifying the page template, click **Save**. Any changes made to a template are automatically applied to all pages that are based on that template.

Designing a page footer

Page footers typically display copyright information or a disclaimer. Depending on the size of your site, you might want to display text links to selected site pages, or include a link to a sitemap of all the pages in your site menu. You might also want to include social sharing buttons that allow visitors to share the page with one or more of their social networks.

Read more/less

To add these elements to the page footer within a page template, insert the following gadgets into layout cells or placeholders at the bottom of the template:

To add...	Insert...	Details
Copyright info or disclaimer	Content gadget	You can combine text, pictures, and other content. You can format the text, using local formatting or text styles. As part of the gadget's settings, you can choose a background image or color to be displayed.

Links to selected site pages	Navigation links gadget	Within the gadget's settings, you can choose whether to link to all pages in your site menu, to pages in the top level of your menu, or to subpages of the currently displayed page.
Sitemap	Sitemap gadget	You can control whether a page appears in the menu (and therefore the sitemap) from its page settings.
Sharing buttons	Sharing buttons gadget	For each button, you can modify the HTML code used. For example, you could change the code so that the current like count does appear beside the Facebook Like button.

Video: Editing page headers and footers 3:
37

On this page:

- Modifying the page header
- Designing a page header
- Modifying the page footer
- Designing a page footer

Expand all sections

See also:

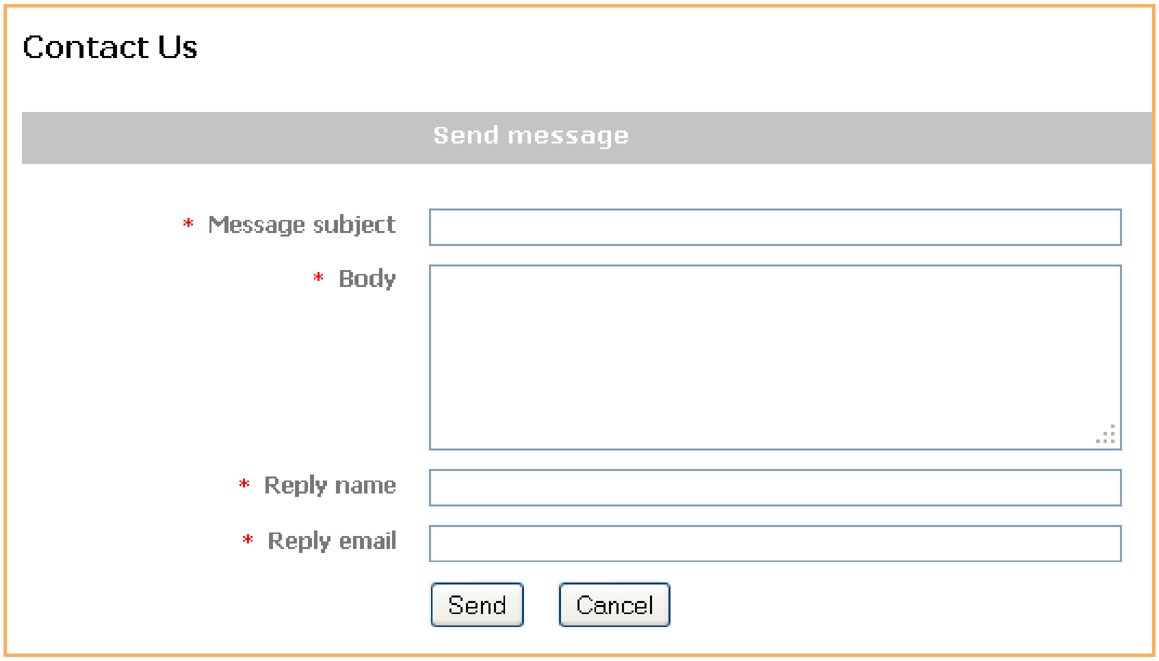
- Page templates
- Designing site pages
- Adding custom content
- Adding dynamic content

Creating a Contact Us or feedback page

Creating a Contact Us or feedback page

Wild Apricot currently does not provide a built-in feedback form to use as the basis for a Contact Us page. You can embed a form from third parties such as Wufoo or you can use a workaround that combines the email member form with a fictitious contact named Contact Us. This workaround is described here.

In Wild Apricot, each member can be emailed via an email member system page that does not reveal the member's email address. Using this page, you route the email to the address of your choice by assigning to a non-existing member. In this way, you do not expose your email address to spammers as you would if you simply provided an email link. You can add a link to the email member form to your page header or footer, or create a Contact Us page and redirect it to the email form.

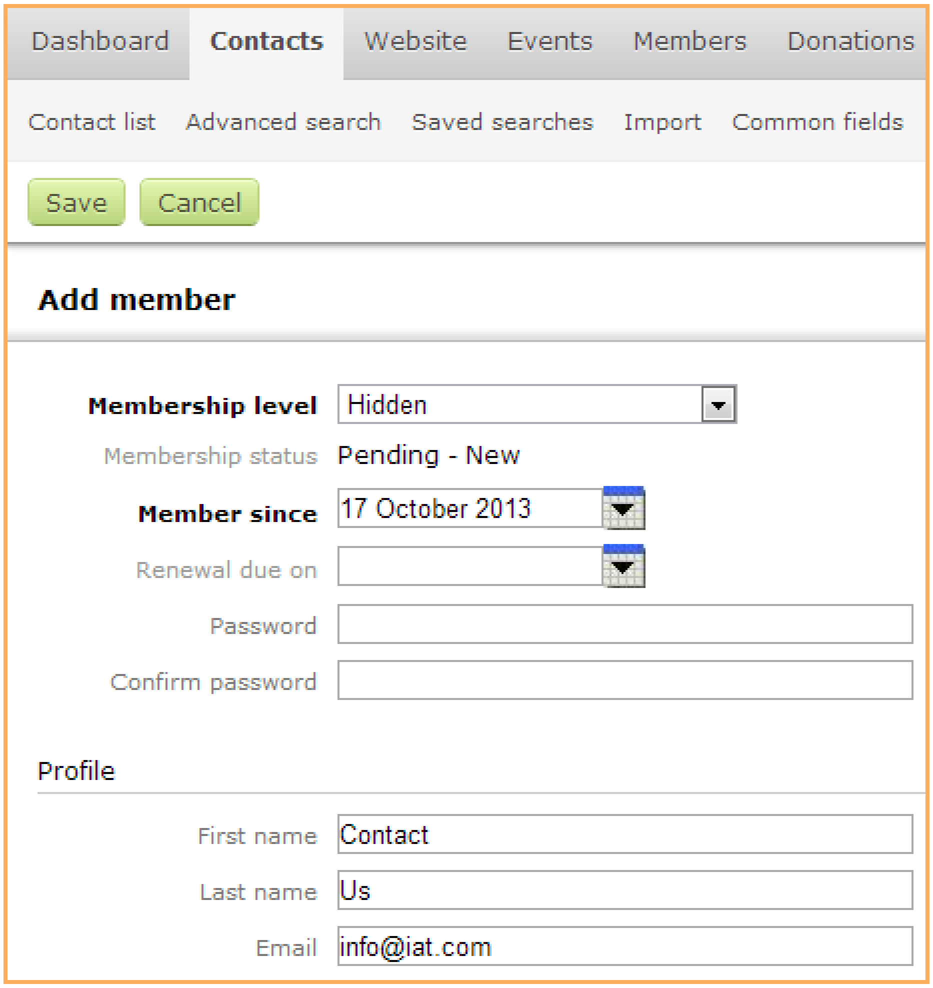


Step 1: Create the Contact Us member

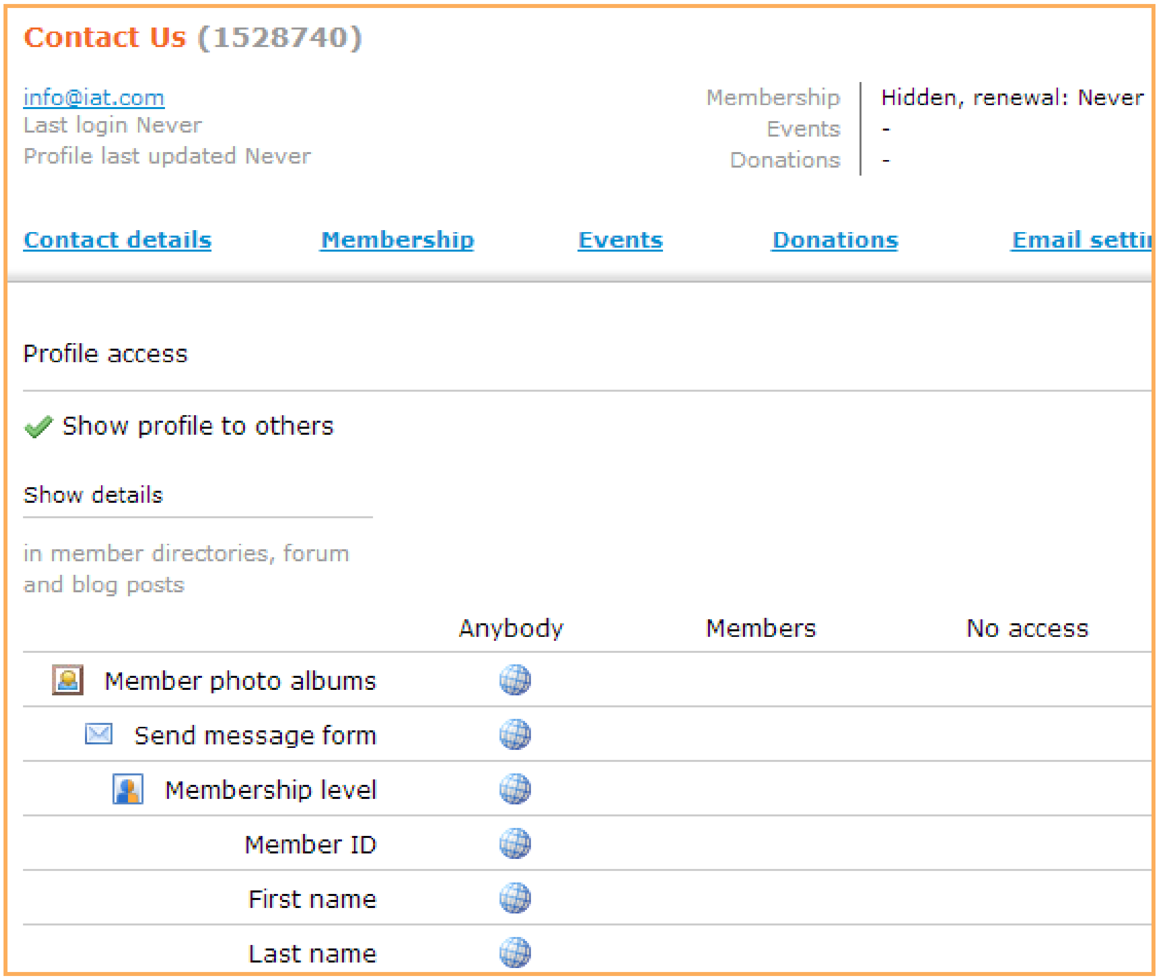
Read more/less

By default, the title of each email form is the first and last name of the contact. So, to display a email form with a title of "Contact Us", we need to create a contact with a first name of "Contact" and a last name of "Us". So that this fictitious contact does not appear on any member directories, we will also create a hidden membership level just for this contact.

1. Under the **Members** menu, click **Levels**.
2. Add a membership level – call it something like "Hidden" – but do not check **Public can apply**.
3. Save the new level.
4. Under the **Members** menu, click **Summary**.
5. Click the **Add member** button.
6. Assign the hidden membership level to the member.
7. Enter **Contact** as the member's first name and **Us** as the member's last name.
8. Enter the email address you want the emails to be sent to. The email cannot be already assigned to an existing contact record.



9. Click **Save** to save the new member record.
10. If prompted to approve the membership, click **Approve**.
11. Click the **Privacy** tab for the new contact and make sure the **Send message form**, **First name**, and **Last name** can be viewed by anybody.



12. If you have any existing member directories, modify the settings for the member directory gadgets so that the hidden membership level you just created is excluded.

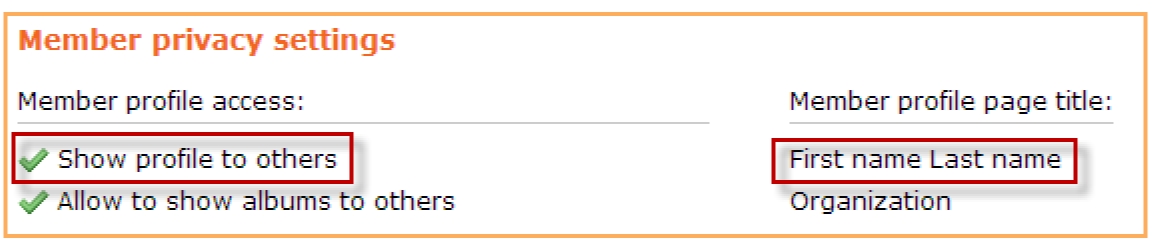
Step 2: Set up the profile page

Read more/less

Each member's public profile page includes an email form, which we are going to use as our contact us form. The member profile is a system page that automatically appears when someone clicks a member's name within a member directory.

So that the email form title reads "Contact Us", we need to review the settings for the member profile page.

1. Under **Members** menu, click **Privacy**.
2. Make sure **Profile access** is set to **Show profile to others**.
3. Make sure the first of the **Fields to use as page title** is **First name Last name**, and that any other fields – such as Organization – are fields you didn't complete for your Contact Us member.

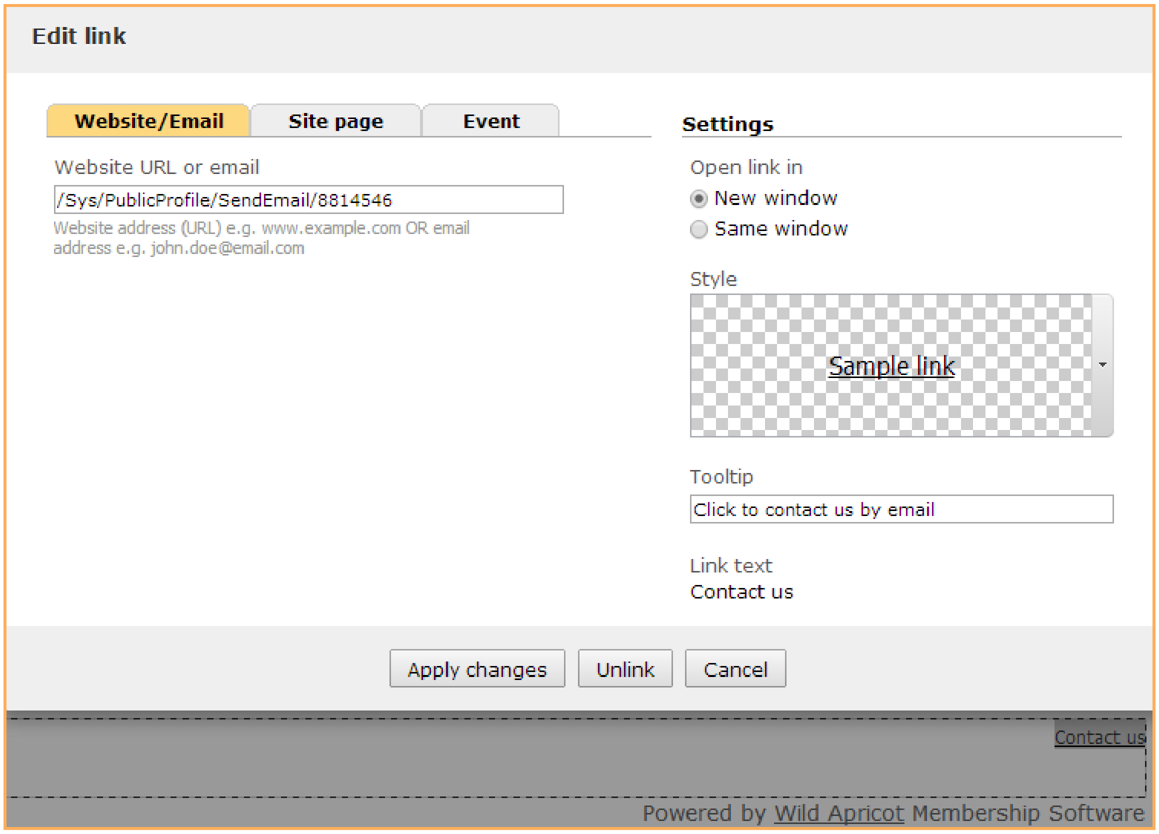


4. If either of these settings are not correct, click **Edit** and make the changes then click **Save**.

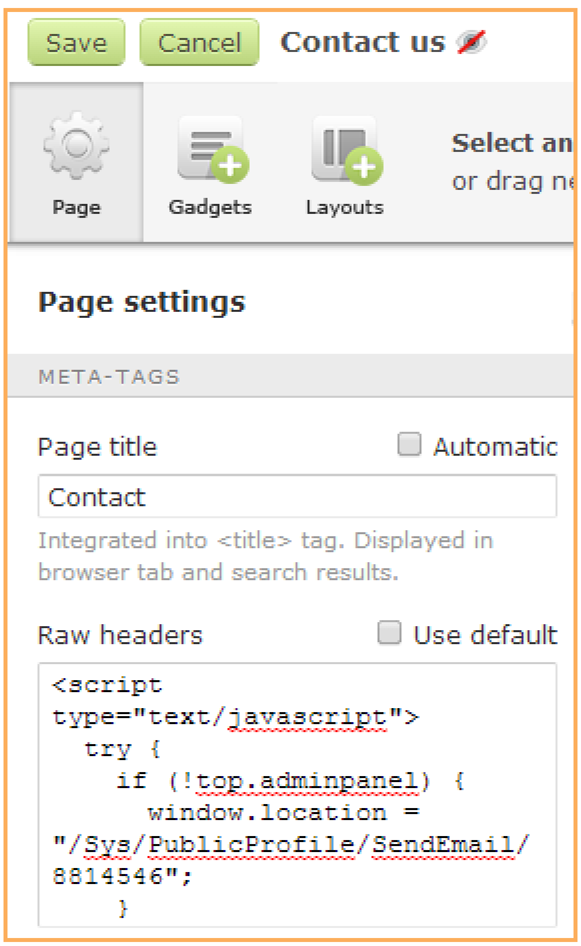
Step 3: Link to the email member form

Read more/less

The final step is to link to the email member form for the Contact Us member. You can link to the form from your header or footer...



...or add a Contact Us page that redirects to the email form.



For the complete code required to redirect a page, click here.

Whether you are linking from your header or footer, or redirecting a contact page, you enter the following as the destination:

```
/Sys/PublicProfile/SendEmail/userid
```

where *userid* is the Contact Us member's user ID. For example, if the user ID is 8814546, then the destination would be:

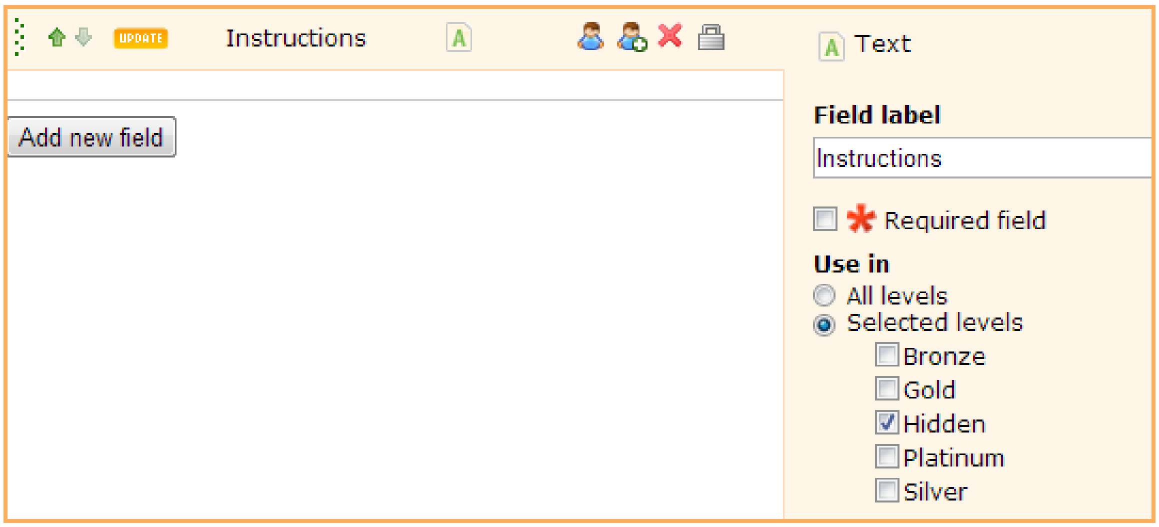
```
/Sys/PublicProfile/SendEmail/8814546
```

Adding instructions to the email form

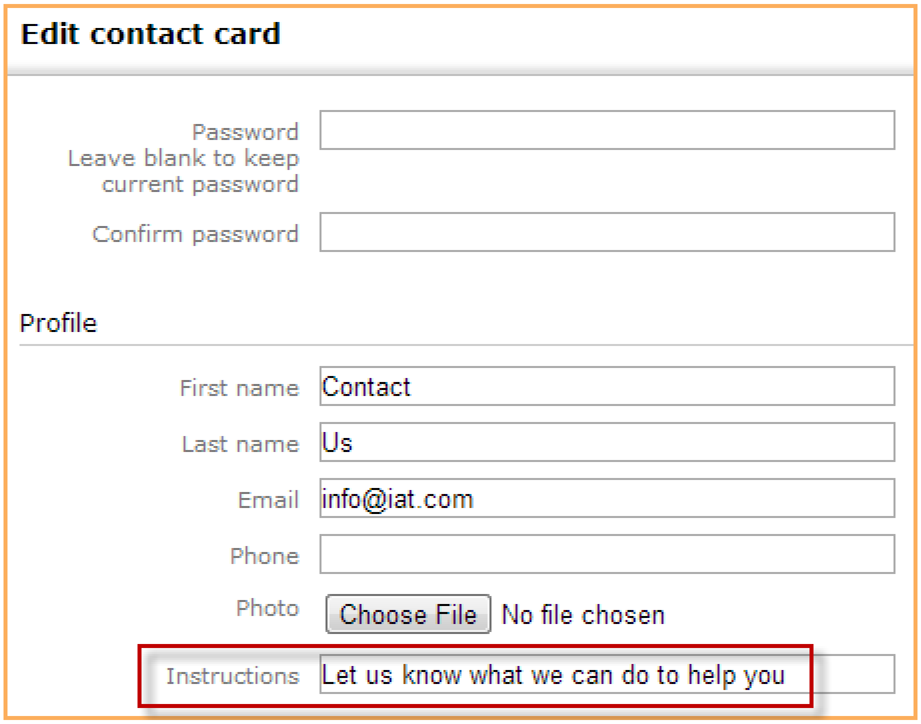
If you want to add a line of instructions to the email form, follow these steps:

Read more/less

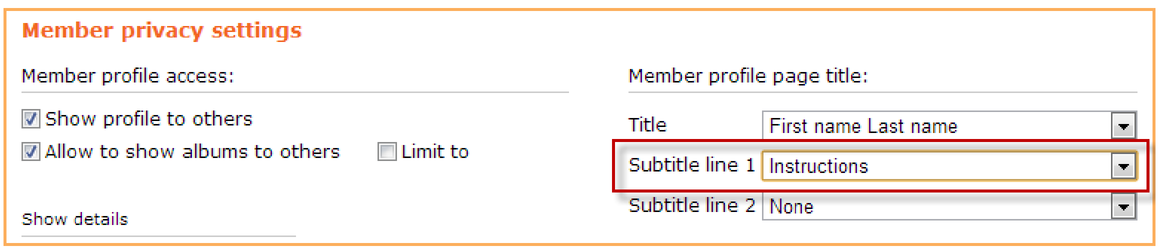
1. Create a membership field that is only available to the hidden membership level.



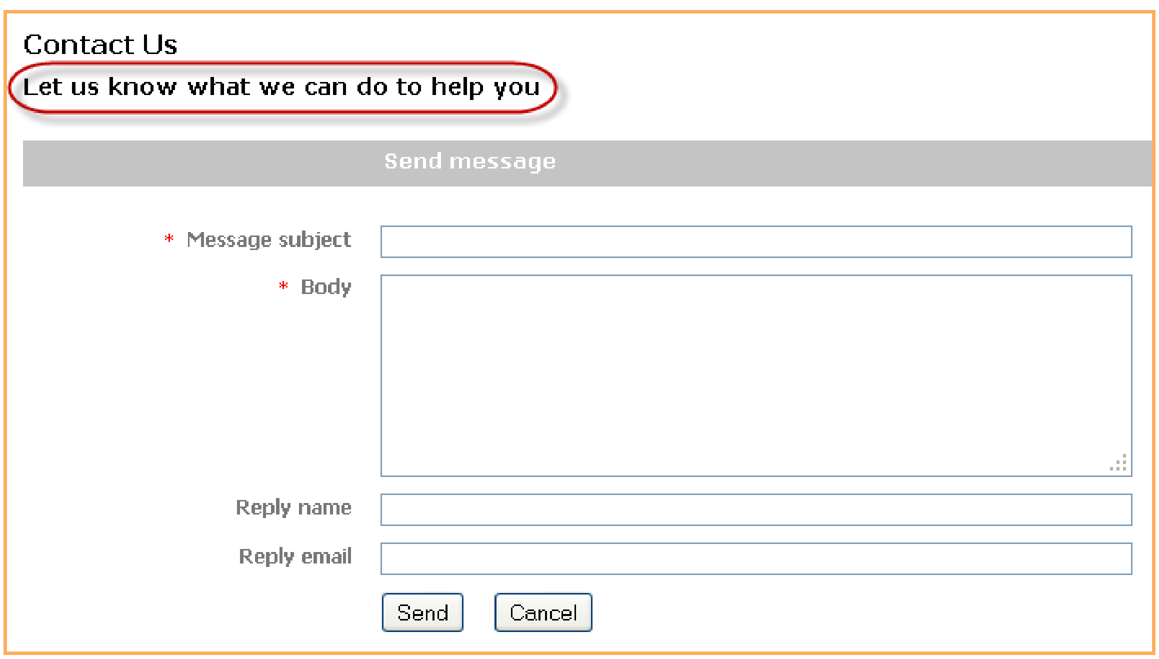
2. Go the contact record for the Contact Us member and enter the instructions you want to display in the membership field you created.



3. From the member privacy settings, include this field as a subtitle after **Last name First name**.



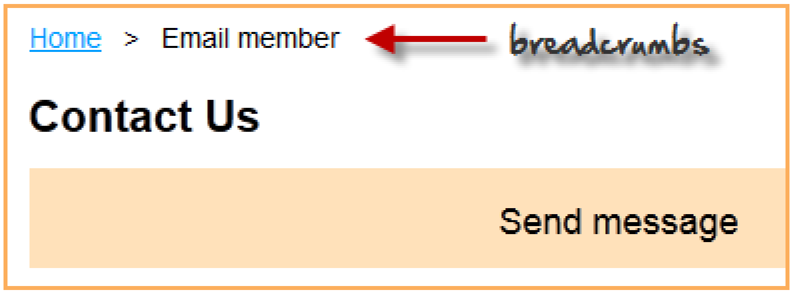
The instructions now appear as a subtitle on the email member form.



Removing the breadcrumbs

Since this workaround uses the email member form, it includes, by default, breadcrumbs that identify the form by name.

Read more/less



If you don't want this to appear – since it reveals the workaround – you can remove the breadcrumbs gadget from the page template used by the **Email member** system page – or switch it to a page template that doesn't include a breadcrumbs gadget.

On this page:

- Step 1: Create the Contact Us member
- Step 2: Set up the profile page
- Step 3: Link to the email member form
- Adding instructions to the email form
- Removing the breadcrumbs

Expand all sections

Customizing your site

Customizing your site

Wild Apricot provides a number of interactive and code-based tools you can use to customize the look, feel, and functionality of your site.

From the Colors and styles screen, you can change the colors and fonts of elements that appear throughout your site. Instead of changing them one at a time, page by page, you can change them all at once. In this way, you can quickly and easily change the appearance of all your menus, links, headings, body text, and forms, among other elements. From here, you can also set the background color or image for your site, or for sections within your site.

For experienced website designers and developers, Wild Apricot provides two additional methods for advanced site customization:

- CSS customization
- Theme overrides

Using CSS customization, you can add CSS code to control the styles that determine the appearance of elements within your site pages.

Using theme overrides, experienced web developers can customize existing Wild Apricot themes or create new ones. Theme overrides involves replacing or overriding theme files – the files that control the appearance of your current theme (i.e. the templates for your web pages).

For more information on customizing your Wild Apricot site, see one of the following help topics:

- Customizing colors and styles
- Setting the site background
- Replacing the admin logo
- Inserting a favorites icon
- Advanced site customization
- Customization examples

Customizing colors and styles

Customizing colors, fonts, styles, and backgrounds

From the **Colors and styles** screen, you can change the colors and fonts of elements that appear throughout your site. Instead of changing them one at a time, page by page, you can change them all at once. In this way, you can quickly and easily change the appearance of all your menus, links, headings, body text, and forms, among other elements. From here, you can also set the background color or image for your site, or for sections within your site.

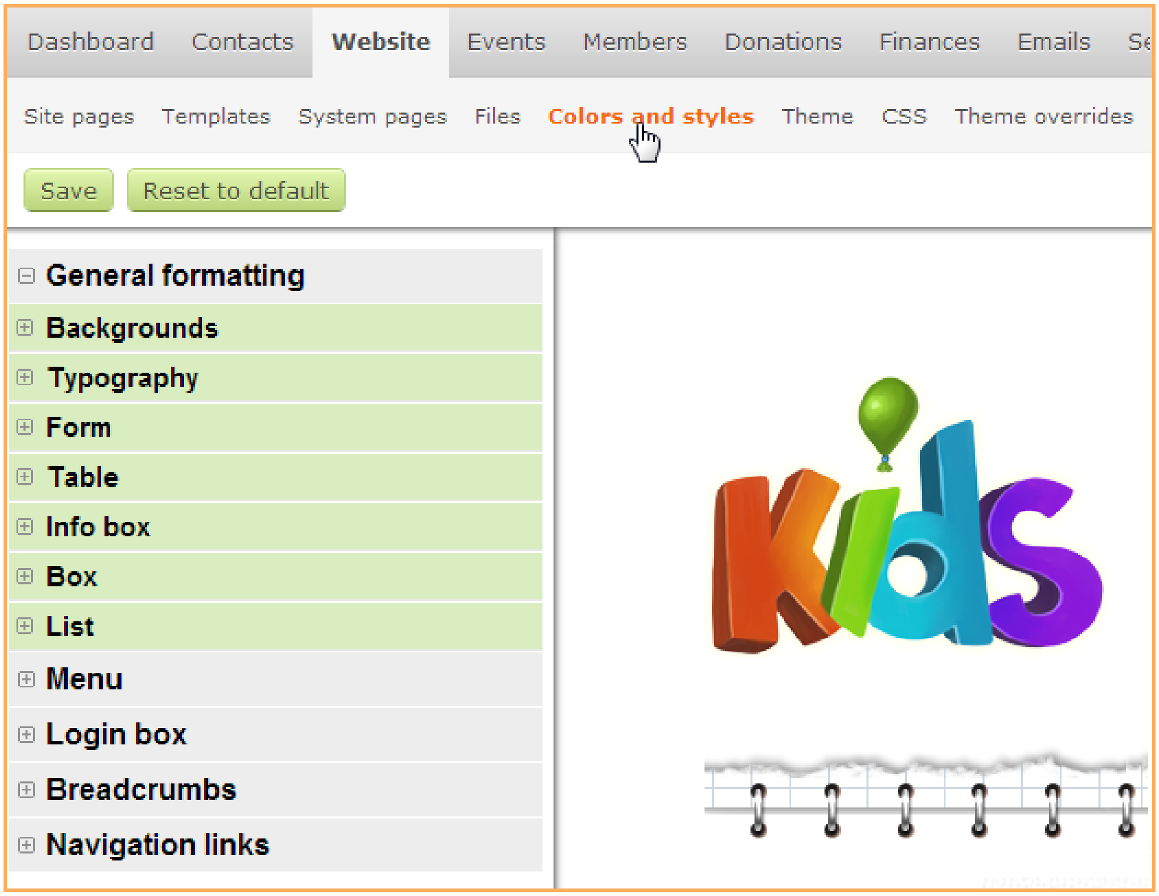
For more advanced fine-tuning and customization you can use CSS customization. Note that any changes you make to colors or styles using CSS will take priority over conflicting changes made on the **Colors and styles** screen.

Displaying the Colors and styles screen

To define the colors and styles of elements on your Wild Apricot site, click **Colors and styles** under the **Website** menu.

Read more/less

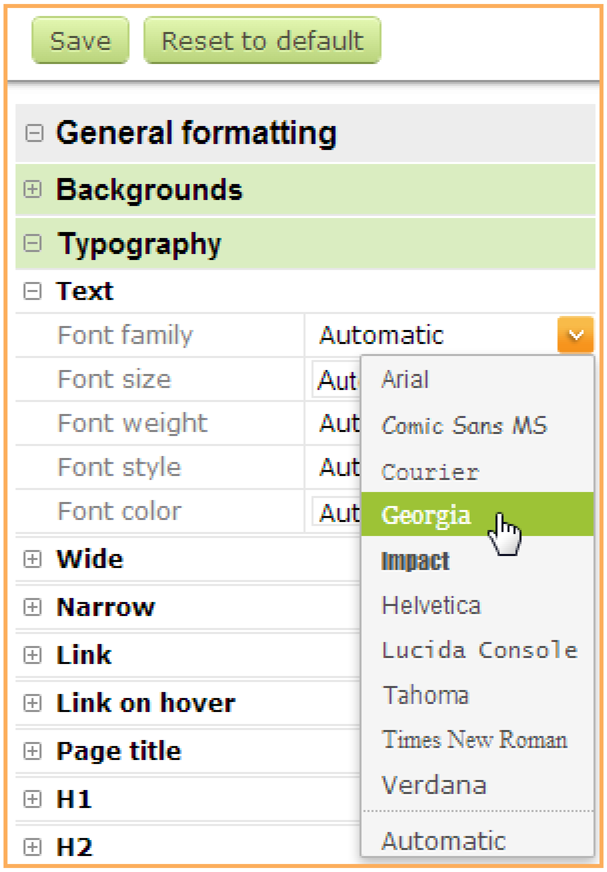
The screen that appears lists the elements you can define along the left, and displays a preview of your changes on the right.



Within the preview, you can click menu items and links to jump from page to page. Your changes won't be applied to the actual site until you click on **Save**.

Your **Colors and styles** settings are specific to the currently selected theme and will not be applied to other themes.

The elements you can define are grouped into categories. To expand the categories and view the elements within, click the plus sign beside the category name. For each element you can define a number of characteristics. If you select the **Automatic** option, the setting will be controlled by your website theme.



To return your site to the original settings for the selected website theme, click **Reset to default**. Any unsaved changes will be lost. To cancel without saving changes, click **Cancel**.

Shared settings

The following settings can be defined for some or all elements.

Read more/less

Setting	Description
Font family	The typeface used to display the text.
Font size	The size of the text. You can specify the font size in pixels, points, or ems.
Font weight	Whether the text is bold or not.
Font style	Whether the text is italicized or not.
Text decoration	Whether the text is underlined or not.
Font color	The color of the text.
Background color	The background color of the element. You can select a color from the drop-down palette or enter the hexadecimal code for the color (e.g. *#FF0000* for red).
Background image	An image to be displayed as the background of the element. You can select an image by clicking the ellipsis button (...), or remove an image by clicking the X button. Using the **Backgroun d repeat** setting (below), you can control whether and how the image is repeated. For more information, see Setting the site background.

Background repeat	Controls whether the background is repeated horizontally or vertically, or both (tiled) or not at all.
Border color	The color of the border surrounding the field or box.

Some elements on your site can be controlled by more than one setting. For example, a heading formatted using the H4 style that's also a link can be controlled using either the **H4** setting or the **Link** setting.

General formatting settings apply throughout your website but can be superseded by more localized settings. For example, your **General formatting > Link** settings can be overridden for login boxes by your **Login box > Link** settings.

Theme-specific settings

Different website themes provide different elements for customization and group them into different categories. For a complete description of categories and elements for different themes, click one of the following links:

Read more/less

- Color and style settings for Aurora, Glass, Keynote, Memo, Nature, and Notebook themes
- Color and style settings for Blueprint themes
- Color and style settings for Bookshelf and Whiteboard themes
- Color and style settings for Business Casual themes
- Color and style settings for Clean Lines, White Space, Dark Impact themes
- Color and style settings for Clean Lines, White Space, Dark Impact themes (deprecated)
- Color and style settings for Fiesta themes
- Color and style settings for Fiesta themes (deprecated)
- Color and style settings for Granite themes
- Color and style settings for Homestead themes
- Color and style settings for Kaleidoscope themes
- Color and style settings for Showcase themes
- Color and style settings for Skyline themes
- Color and style settings for Terra and Firma themes
- Color and style settings for Tinted Tiles and Building Blocks themes
- Color and style settings for Treehouse themes
- Color and style settings for Treehouse themes (deprecated)
- Colors and styles settings by gadget

> The settings appearing on the Color and Styles screen, and their order and default values, can be customized for a particular theme using theme overrides. For more information, see Customizing Colors and Styles options for themes.

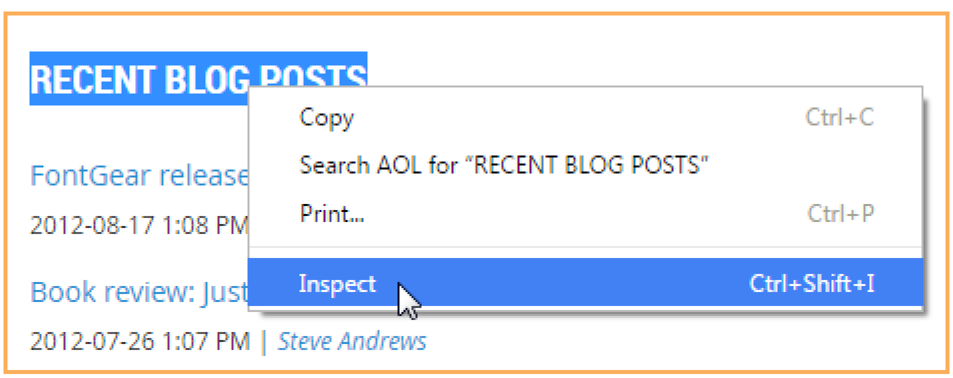
For a description of colors and styles settings for specific gadgets, see Colors and styles settings by gadget.

Identifying which elements control specific gadget components

If you're trying to figure out which element you need to adjust on the Colors and Styles screen to change a particular gadget component, you can use the **Inspect** option that's available on all modern browsers.

Read more/less

To use this option, right click over the component you want to change and select the **Inspect** option.



In the window that appears, the selected component should appear highlighted and surrounded by HTML tags.

```
▼<div id="id_bktFXqo" class="WaGadget WaGadgetRe
componentid="bktFXqo">
  ▼<div class="gadgetStyleTitle">
      <h4>
      Recent blog posts</h4> == $0
    </div>
  ▶<div class="gadgetStyleBody " style data-areaH
    ::after
  </div>
```

In most cases, the tag should correspond to the element you need to adjust on the Colors and Styles screen. In the above example, the **Recent blog posts** heading is surrounded by <H4> tags. To change the appearance of this element, you adjust the **H4** or **Heading 4** ele ment under **Typography** on the Colors and Styles screen.

On this page:

- Displaying the Colors and styles screen
- Shared settings
- Theme-specific settings
- Identifying which elements control specific gadget components

Expand all sections

See also:

- Colors and styles settings by gadget

Colors and styles settings by gadget

Colors and styles settings by gadget

You can change the colors, text styles, and backgrounds used in your website from the Colors and styles screen .

ⓘ For more advanced fine-tuning, you can use CSS customization and theme overrides.

Different website themes use different colors and styles settings. For a complete description of categories and elements for different themes, click here.

For a description of colors and styles settings by gadget, see below. Remember that changing colors and styles can affect multiple gadgets that use the same setting.

Blog gadgets

Colors and styles settings for blog gadgets

For blog gadgets, you can modify the following elements from the Colors and styles screen:

To change...	modify...	under...
Blog post title	Title H4, Link	Gadgets or Gadget styles (*Blueprint, Clean Lines, Dark Impact, Fiesta, Firma, Homestead, Showcase, Skyline, Terra, and White Space themes*) General formatting or Typography

Blog post author	Author Link	Blog (*Bookshelf, Building Blocks, Clean Lines, Dark Impact, Fiesta, Firma, Kaleidoscope, Homestead, Showcase, Skyline, Terra, Tinted Tiles, Whiteboard, and White Space themes*) General formatting or Typography
Blog post date and time	Date and time	Blog (*Bookshelf, Building Blocks, Clean Lines, Dark Impact, Fiesta, Firma, Homestead, Kaleidoscope, Showcase, Skyline, Terra, Tinted Tiles, Whiteboard, and White Space themes*)
Blog post content	Text/Normal	General formatting or Typography
Add post, Post, Add Comment, Cancel buttons	Normal/Hover	(*Clean Lines, Dark Impact, Fiesta, White Space themes*) Functional buttons
Read more, Comment, Edit, Delete links	Links Text/Normal Link	Blog (*Building Blocks, Firma, Kaleidoscope, Terra, Tinted Tiles themes*) General formatting or Typography
Icons used on mobile version	Icons	Blog (*Clean Lines, Dark Impact, Fiesta, Firma, Homestead, Skyline, Terra, and White Space themes*)

Colors and styles settings for recent blog post gadgets

For recent blog posts gadgets, you can modify the following elements from the Colors and styles screen:

To change...	modify...	under...
Gadget title	Title H4	Gadgets/Gadget styles (*Blueprint, Clean Lines, Dark Impact, Fiesta, Firma, Homestead, Showcase, Skyline, Terra, and White Space themes*) General formatting or Typography
Blog title/link	Text/Normal Link	General formatting or Typography
Author	Author	Blog (*Bookshelf, Building Blocks, Clean Lines, Dark Impact, Fiesta, Firma, Homestead, Kaleidoscope, Showcase, Skyline, Terra, Tinted Tiles, Whiteboard, and White Space themes*) Gadgets/Gadget styles (*for Blueprint, Home stead theme*s)
Blog date	Date and time	Blog (*Bookshelf, Building Blocks, Clean Lines, Dark Impact, Fiesta, Firma, Homestead, Kaleidoscope, Showcase, Skyline, Terra, Tinted Tiles, Whiteboard, and White Space themes*) Gadgets/Gadget styles (*for Blueprint, Home stead themes*)

Donation gadgets

Colors and styles settings for donation form gadgets

For donation form gadgets, you can modify the following elements from the Colors and styles screen:

To change...	modify...	under...
"Donations"	Text/Normal H3 Form instructions	General formatting or Typography General formatting > Form (*Bookshelf, Building Blocks, Clean Lines, Dark Impact, Fiesta, Firma, Homestead, Kaleidoscope, Showcase, Skyline, Terra, Tinted Tiles, Whiteboard, White Space only*)
"Mandatory fields"	Text/Normal Form instructions	General formatting or Typography General formatting > Form (Bookshelf, Building Blocks, Clean Lines, Dark Impact, Fiesta, Firma, Homestead, Kaleidoscope, Showcase, Skyline, Terra, Tinted Tiles, Whiteboard, White Space only)
Labels	Text/Normal Labels	General formatting or Typography General formatting > Form
Options	Text/Normal Option title	General formatting or Typography General formatting > Form
Pay, Cancel buttons	Normal/Hover	Functional buttons (*Clean Lines, Dark Impact, Fiesta, White Space themes*)

Colors and styles settings for donation goal gadgets

For donation goal gadgets, you can modify the following elements from the Colors and styles screen:

To change...	modify...	under...
Gadget title	H4 Title	General formatting or Typography Gadgets/Gadget styles (*Blueprint, Fiesta, Firma, Homestead, Showcase, Skyline, and Terra themes*)
Gadget background	Background	Gadgets (*Showcase, Skyline themes*)
Progress bar fill color	Donation bar	Gadgets/Gadget styles (*Blueprint, Fiesta, Homestead, and Skyline themes*) Donation goal (*Building Blocks, Clean Lines, Dark Impact, Firma, Kaleidoscope, Showcase, Terra, Tinted Tiles, White Space themes*)
Progress bar background	Donation bar (back)ground	Gadgets/Gadget styles (*Blueprint, Fiesta, Homestead, Skyline themes*) Donation goal (*Building Blocks, Clean Lines, Dark Impact, Firma, Kaleidoscope, Showcase, Terra, Tinted Tiles, White Space themes*)
Progress bar outline	Donation bar border color	Donation goal (*Building Blocks, Firma, Kaleidoscope, Showcase, Terra, Tinted Tiles*)

Progress bar percentage	Donation bar percentage	Donation goal (*Building Blocks, Firma, Kaleidoscope, Showcase, Terra, Tinted Tiles*)
"Goal, "Collected" labels	Donation labels Text/Normal	Gadgets (*Homestead, Skyline themes*) General formatting or Typography (*all other themes*)
"Goal" value	Donation labels Donation goal Text/Normal	Donation goal (*Building Blocks, Firma, Kaleidoscope, Terra, Tinted Tiles*) Gadgets (*Homestead, Skyline themes*) General formatting or Typography (*all other themes*)
"Collected value"	Donation labels Donation collected Text/Normal	Donation goal (*Building Blocks, Firma, Kaleidoscope, Showcase, Terra, Tinted Tiles*) Gadgets (*Homestead, Skyline themes*) General formatting or Typography (*all other themes*)
Description	Donation description Text/Normal	Gadgets (*Homestead, Skyline themes*), Donation goal (*Building Blocks, Firma, Kaleidoscope, Showcase, Terra, Tinted Tiles*) General formatting or Typography (*all other themes*)
Donate button	Donation button	Gadgets (*Homestead, Skyline themes*) Donation goal (*Building Blocks, Firma, Kaleidoscope, Showcase, Terra, Tinted Tiles*)

Event gadgets

Colors and styles settings for event calendar gadgets

For event calendar gadgets, you can modify the following elements from the Colors and styles screen:

To change...	modify...	under...
Section headings	H3 Event calendar title Title	General formatting or Typography Typography (*Bookshelf, Clean Lines, Dark Impact, Fiesta, Firma, Homestead, Showcase, Skyline, Terra, Treehouse, Whiteboard, and White Space themes*) Event calendar (*Building Blocks, Tinted Tiles themes*)
"Registration" on event details page	H4	General formatting or Typography
"Switch to Calendar/List View"	Text/Normal Link	General formatting or Typography
Event name	H4 Link	General formatting or Typography
Event details	Text/Normal	General formatting or Typography
Event description	Text/Normal Info box	General formatting or Typography General formatting (*for Blueprint, Business Casual, and Granite themes*)

"Already registered", "Show details"	Text/Normal Link Info box	General formatting or Typography General formatting or Typography General formatting (*for Blueprint, Business Casual, and Granite themes*)
Background color of event detail area	Colored box >> Info box	General formatting (*for Aurora, Glass, Keynote, Memo, Nature, and Notebook themes*)
Background color of event registration form	Form >> Background color	General formatting (*for Aurora, Glass, Keynote, Memo, Nature, and Notebook themes*)
Register button	Normal/Hover	Functional buttons (*Clean Lines, Dark Impact, Fiesta, White Space themes*)

Colors and styles settings for upcoming events gadgets

For upcoming events gadgets, you can modify the following elements from the Colors and styles screen:

To change...	modify...	under...
Gadget title	H4 Title	General formatting or Typography Gadgets or Gadget styles (*Blueprint, Clean Lines, Dark Impact, Fiesta, Firma, Homeste ad, Showcase, Skyline, Terra, and White Space themes*)
Event name/link	Text/Normal Link	General formatting or Typography
Date and location	Text/Normal Location	General formatting or Typography Gadgets/Gadget styles (*Blueprint, Building Blocks, Clean Lines, Dark Impact, Fiesta, Firma, Homestead, Kaleidoscope, Showcase, Skyline, Terra, Tinted Tiles, and White Space themes*) Typography (*for Bookshelf themes*)

Forum gadgets

Colors and styles settings for discussion forum gadgets

For discussion forum gadgets, you can modify the following elements from the Colors and styles screen:

To change...	modify...	under...
"Subscribe/Unsubscribe"	Text/Normal Link	General formatting or Typography
Forum headings	Text/Normal H4 Column/Forum headings	General formatting or Typography Forum (*Bookshelf, Building Blocks, Clean Lines, Dark Impact, Fiesta, Firma, Homestead, Kaleidoscope, Skyline, Terra, Tinted Tiles, Treehouse, Whiteboard and White Space themes*)
Forum entries	Text/Normal Link Text	General formatting or Typography List (*Blueprint themes*)

Table rows	Table row Row	Forum (*Bookshelf, Building Blocks, Clean Lines, Dark Impact, Fiesta, Firma, Homestead, Kaleidoscope, Skyline, Terra, Tinted Tiles, Treehouse, Whiteboard and White Space themes*) List (*Blueprint themes*)
Links within table	Table links Link	Forum (*Bookshelf, Building Blocks, Clean Lines, Dark Impact, Fiesta, Firma, Homestead, Kaleidoscope, Skyline, Terra, Tinted Tiles, Treehouse, Whiteboard and White Space themes*) List (*Blueprint themes*)
Topic author	Author	Forum (*Bookshelf, Building Blocks, Clean Lines, Dark Impact, Fiesta, Firma, Homestead, Kaleidoscope, Skyline, Terra, Tinted Tiles, Treehouse, Whiteboard and White Space themes*)
Topic date and time	Date and time	Forum (*Bookshelf, Building Blocks, Clean Lines, Dark Impact, Fiesta, Firma, Homestead, Kaleidoscope, Skyline, Terra, Tinted Tiles, Treehouse, Whiteboard and White Space themes*)
Create topic button	Normal/Hover	Functional buttons (*Clean Lines, Dark Impact, Fiesta, White Space themes*)
Icons used on mobile version	Icons	Forum (*Bookshelf, Building Blocks, Clean Lines, Dark Impact, Fiesta, Firma, Homestead, Kaleidoscope, Skyline, Terra, Tinted Tiles, Whiteboard and White Space themes*)

Colors and styles settings for forum summary gadgets

For forum summary gadgets, you can modify the following elements from the Colors and styles screen:

To change...	modify...	under...
Forum category	Forum category	Forum (*Bookshelf, Building Blocks, Clean Lines, Dark Impact, Fiesta, Firma, Homestead, Kaleidoscope, Showcase, Skyline, Terra, Tinted Tiles, Treehouse, Whiteboard, and White Space themes only*)
Forum name	H5	General formatting or Typography
Column headings	Column headings H4	Forum (*Bookshelf, Building Blocks, Clean Lines, Dark Impact, Fiesta, Firma, Homestead, Kaleidoscope, Showcase, Skyline, Terra, Tinted Tiles, Treehouse, Whiteboard, and White Space themes only*) General formatting or Typography
Summary text	Text	General formatting or Typography
Summary links	Links	General formatting or Typography
Table listing forum topics	Info box	General formatting (*for Blueprint, Business Casual, and Granite themes*)

Table rows	Table row	Forum (*Bookshelf, Building Blocks, Clean Lines, Dark Impact, Fiesta, Firma, Homestead, Kaleidoscope, Showcase, Skyline, Terra, Tinted Tiles, Treehouse, Whiteboard, and White Space themes only*)
Links within table	Table links	Forum (*Bookshelf, Building Blocks, Clean Lines, Dark Impact, Fiesta, Firma, Homestead, Kaleidoscope, Showcase, Skyline, Terra, Tinted Tiles, Treehouse, Whiteboard, and White Space themes only*)
Topic author	Author	Forum (*Bookshelf, Building Blocks, Clean Lines, Dark Impact, Fiesta, Firma, Homestead, Kaleidoscope, Showcase, Skyline, Terra, Tinted Tiles, Treehouse, Whiteboard, and White Space themes only*)
Topic date and time	Date and time	Forum (*Bookshelf, Building Blocks, Clean Lines, Dark Impact, Fiesta, Firma, Homestead, Kaleidoscope, Showcase, Skyline, Terra, Tinted Tiles, Treehouse, Whiteboard, and White Space themes only*)
Icons used on mobile version	icons	Forum (*Building Blocks, Clean Lines, Dark Impact, Fiesta, Firma, Homestead, Kaleidoscope, Showcase, Skyline, Terra, Tinted Tiles, and White Space themes*)

Colors and styles settings for forum updates gadgets

For forum updates gadgets, you can modify the following elements from the Colors and styles screen:

To change...	modify...	under...
Gadget title	H4 Title	General formatting or Typography Gadgets or Gadget styles (*Blueprint, Clean Lines, Dark Impact, Fiesta, Firma, Homestead, Showcase, Skyline, Terra, and White Space themes*)
Topic title/link	Text/Normal Link	General formatting or Typography
Author	Text/Normal Link Author	General formatting or Typography Gadget styles (*Blueprint themes*) Forum (*Bookshelf, Building Blocks, Clean Lines, Dark Impact, Fiesta, Firma, Homestead, Kaleidoscope, Showcase, Skyline, Terra, Tinted Tiles, Treehouse, Whiteboard, and White Space themes*)
Update date	Text/Normal Date and time	General formatting or Typography Gadget styles (*Blueprint themes*) Forum (*Bookshelf, Building Blocks, Clean Lines, Dark Impact, Fiesta, Firma, Homestead, Kaleidoscope, Showcase, Skyline, Terra, Tinted Tiles, Treehouse, Whiteboard, and White Space themes*)

Membership gadgets

Colors and styles settings for membership application gadgets

For membership application gadgets, you can modify the following elements from the Colors and styles screen:

To change...	modify...	under...
"Select membership level"	Text/Normal H3 Form instructions	General formatting or General formatting > Typography General formatting > Form (*Bookshelf, Building Blocks, Clean Lines, Dark Impact, Fiesta, Firma, Homestead, Kaleidoscope, Showcase, Skyline, Terra, Tinted Tiles, Treehouse, Whiteboard, and White Space only*)
"Mandatory fields"	Text/Normal Form instructions	General formatting or General formatting > Typography General formatting > Form (*Bookshelf, Building Blocks, Clean Lines, Dark Impact, Fiesta, Firma, Homestead, Kaleidoscope, Showcase, Skyline, Terra, Tinted Tiles, Treehouse, Whiteboard, and White Space only*)
"Membership level"	Text/Normal Labels	General formatting or General formatting > Typography General formatting > Form
Level name	Text/Normal Option title	General formatting or General formatting > Typography General formatting > Form
Level description	Text/Normal Field explanation Option title	General formatting or General formatting > Typography General formatting > Form
Next, Cancel buttons	Normal/Hover	Functional buttons (*Clean Lines, Dark Impact, Fiesta, White Space themes*)
Background color of form	Form >> Background color	General formatting (*for Aurora, Glass, Keynote, Memo, Nature, and Notebook themes*)

Colors and styles settings for member directory gadgets

For member directory gadgets, you can modify the following elements from the Colors and styles screen:

To change...	modify...	under...
Filter field name	Text/Normal	General formatting or Typography
Filter field values	Text/Normal Link	General formatting or Typography
"Advanced search/Simple search"	Text/Normal Link	General formatting or Typography
Search box	Text/Normal	General formatting or Typography

Directory headings	Text/Normal (*Blueprint, Nature, Memo, Glass, Keynote, Notebook, Aurora themes*) Header (*Business Casual, Fiesta, and Granite themes*) Column headings (*Bookshelf, Building Blocks, Clean Lines, Dark Impact, Firma, Homestead, Kaleidoscope, Showcase, Skyline, Terra, Tinted Tiles, Treehouse, Whiteboard, White Space themes*)	General formatting or Typography Table
Directory entries	Text/Normal Table row (*Nature, Memo, Glass, Keynote, Notebook, Aurora themes*)	General formatting or Typography Table
Public profile links	Link (General formatting or Typography) Table row, Table links (*except for Nature, Memo, Glass, Keynote, Notebook, Aurora themes*)	General formatting or Typography Table
Advanced search labels	Text (General formatting or Typography) Label(s) (*except for Nature, Memo, Glass, Keynote, Notebook, Aurora themes*) Text (*Nature, Memo, Glass, Keynote, Notebook, Aurora themes*)	General formatting or Typography Form Form
Advanced search values	Text/Normal (General formatting or Typography) Option title (*except for Nature, Memo, Glass, Keynote, Notebook, Aurora themes*) Text (*Nature, Memo, Glass, Keynote, Notebook, Aurora themes*)	General formatting or Typography Form Form

Colors and styles settings for featured member gadgets

For featured member gadgets, you can modify the following elements from the Colors and styles screen:

To change...	modify...	under...
Gadget title	H4 Title	General formatting or Typography Gadgets or Gadget styles (*Blueprint, Building Blocks, Clean Lines, Dark Impact, Fiesta, Firma, Homestead, Showcase, Skyline, Terra, and White Space themes*)
Member link	Member label H4 Link	Featured member (*Building Blocks, Kaleidoscope, Tinted Tiles themes*) General formatting or Typography
Label 2	Label 2 Text/Normal	Featured member (*Building Blocks, Kaleidoscope, Tinted Tiles themes*) General formatting or Typography
Label 3	Label 3 Text/Normal	Featured member (*Building Blocks, Kaleidoscope, Tinted Tiles themes*) General formatting or Typography
Link to member directory	Link to member directory Text/Normal Link	Featured member (*Building Blocks, Kaleidoscope, Tinted Tiles themes*) General formatting or Typography

Colors and styles settings for subscription form gadgets

For subscription form gadgets, you can modify the following elements from the Colors and styles screen:

To change...	modify...	under...
"Subscription form"	Form instructions H3	General formatting > Form (*Bookshelf, Building Blocks, Clean Lines, Dark Impact, Fiesta, Firma, Homestead, Kaleidoscope, Showcase, Skyline, Terra, Tinted Tiles, Treehouse, Whiteboard, and White Spaces themes*) General formatting or Typography
"Mandatory fields"	Form instructions Text/Normal	General formatting > Form (*Bookshelf, Building Blocks, Clean Lines, Dark Impact, Fiesta, Firma, Homestead, Kaleidoscope, Showcase, Skyline, Terra, Tinted Tiles, Treehouse, Whiteboard, and White Spaces themes*) General formatting or Typography
Labels	Text/Normal Labels	General formatting or Typography General formatting > Form
Back button	Text/Normal Link	General formatting or Typography
Subscribe button	Normal/Hover	Functional buttons (*Clean Lines, Dark Impact, Fiesta, White Space themes*)

Colors and styles settings for log in form gadgets

For log in form gadgets, you can modify the following elements from the Colors and styles screen:

To change...	modify...	under...
Gadget title	H4 Title	General formatting or Typography Gadgets or Gadget styles (*Blueprint, Clean Lines, Dark Impact, Fiesta, Firma, Homestead, Showcase, Terra, Treehouse, Skyline, and White Space themes*)
"Email", "Password",	Text Labels	Login box Log in gadgets
Email, password fields	Input field	Login box or Log in gadgets
"Remember me"	Text	Login box or Log in gadgets
"Forgot password"	Link(s)	Login box or Log in gadgets
Login button	Button/Button style	Login box/Log in gadgets (*Bookshelf, Building Blocks, Clean Lines, Dark Impact, Fiesta, Firma, Homestead, Kaleidoscope, Showcase, Skyline, Terra, Tinted Tiles, Whiteboard, and White Space themes*)

Navigational gadgets

Colors and styles settings for menu gadgets

For menu gadgets, you can modify the following elements from the Colors and styles screen:

To change...	modify...	under...	For...

Top-level menu items	Main/Normal	Menu Navigation gadgets >> Menu	Blueprint, Clean Lines, Dark Impact, Fiesta, Showcase, Skyline, Treehouse, White Space themes Firma, Terra themes
Drop-down menu items	Drop down	Menu Navigation gadgets >> Menu	Blueprint, Clean Lines, Dark Impact, Fiesta, Showcase, Showcase, Skyline, Treehouse, White Space themes Firma, Terra themes
Menu items	Item	Menu	Business Casual, Granite themes
Active menu items	Active item	Menu	Business Casual, Granite themes

Colors and styles settings for breadcrumbs gadgets

For breadcrumb gadgets, you can modify the following elements from the Colors and styles screen:

To change...	modify...	under...	For...
Typeface of items	General	Breadcrumbs Navigation gadgets >> Breadcrumbs	All themes except Aurora, Glass, Keynote, Memo, Nature, and Notebook Firma, Terra themes
Color of links	Link	Breadcrumbs Navigation gadgets >> Breadcrumbs	All themes except Aurora, Glass, Keynote, Memo, Nature, and Notebook Firma, Terra themes
Color of current page	Current page	Breadcrumbs Navigation gadgets >> Breadcrumbs	All themes except Aurora, Glass, Keynote, Memo, Nature, and Notebook Firma, Terra themes

Colors and styles settings for navigation links gadgets

For navigation links gadgets, you can modify the following elements from the Colors and styles screen:

To change...	modify...	under...	For...
Font color of links	Link	Navigational links Navigation gadgets >> Navigation links	Blueprint, Bookshelf, Fiesta, Showcase, Skyline, Treehouse, Whiteboard themes Firma, Terra themes
Font color of links on hover	Link on hover	Navigational links Navigation gadgets >> Navigation links	Blueprint, Bookshelf, Fiesta, Sh owcase, Skyline, Treehouse, Whiteboard themes Firma, Terra themes

Colors and styles settings for site search gadgets

For site search gadgets, you can modify the following elements from the Colors and styles screen:

To change...	modify...	under...

Gadget title	H4 Title	Getting formatting or Typography Gadgets or Gadget styles (*Blueprint, Fiesta, Firma, Showcase, Skyline, and Terra themes*)
Search prompt	Text	Getting formatting or Typography

Colors and styles settings for sitemap gadgets

For sitemap gadgets, you can modify the following elements from the Colors and styles screen:

To change...	modify...	under...	for...
Fonts	General	Navigation gadgets >> Sitemap	Firma, Showcase, Terra themes
Colors	Link	Navigation gadgets >> Sitemap	Firma, Showcase, Terra themes
Fonts and colors	Text or Link	General formatting or Typography	All other themes

Colors and styles settings for secondary menu gadgets

For secondary menu gadgets, you can modify the following elements from the Colors and styles screen:

To change...	modify...	under...	For...
Appearance of menu items	General	Menu >> Secondary menu	Terra, Showcase, Firma themes
Appearance of menu items when hovered over	Hover	Menu >> Secondary menu	Terra, Showcase, Firma themes

Other gadgets

Colors and styles settings for photo album gadgets

For photo album gadgets, you can modify the following elements from the Colors and styles screen:

To change...	modify...	under...
Gadget title	H4 Title	General formatting or Typography Gadgets or Gadget styles (*Blueprint, Clean Lines, Dark Impact, Fiesta, Firma, Kaleidoscope, Homestead, Showcase, Skyline, Terra, and White Space themes*)
Labels	Text/Normal	General formatting or Typography
Links	Text/Normal Link	General formatting or Typography

On this page:

Color and style settings for Blueprint themes

Color and style settings for Blueprint themes

From the Colors and styles screen, you can change the colors and fonts of elements that appear throughout your site. To display the Colors and styles screen, click **Colors and styles** under the **Website** menu.

The Colors and styles screen lists the elements you can change along the left, and displays a preview of your changes on the right. Within the preview, you can click menu items and links to jump from page to page. Your changes won't be applied to the actual site until you click on **Save**.

Settings for different elements are grouped into categories. The categories vary depending on the website theme you have chosen.

To expand the categories and view the elements within, click the plus sign beside the category name. For each element you can define a number of characteristics. If you select the **Automatic** option, the setting will be controlled by your website theme.

Some elements on your site can be controlled by more than one setting. For example, a heading formatted using the H4 style that's also a link can be controlled using either the **General formatting > H4** setting or the **General formatting > Link** setting.

Some elements are general settings than be overridden or superseded by more specific elements. For example, the **Site** background setting under **General formatting > Backgrounds** can be overridden at the top of the page by one of the header settings, or in the middle of the page using one of the content settings.

> The settings appearing on the Color and Styles screen, and their order and default values, can be customized for a particular theme using theme overrides. For more information, see Customizing Colors and Styles options for themes.

You can modify the following elements for Blueprint themes. (For a description of colors and styles settings for specific gadgets, see Colors and styles settings by gadget.)

General formatting

General formatting settings apply throughout your website but can be superseded by more specific settings. For example, your **General formatting > Link** settings can be overridden for breadcrumbs by your **Login box > Links** settings.

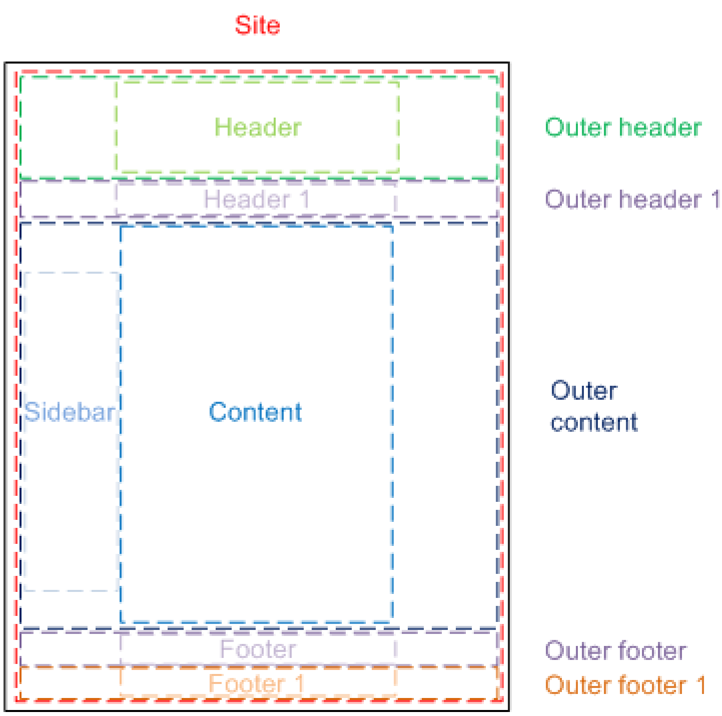
Backgrounds

For each of the elements below, you can control the following background attributes.

Attributes

Attribute	Description
Background color	The background color of the element. You can select a color from the drop-down palette or enter the hexadecimal code for the color (e.g. *#FF0000* for red).
Background image	An image to be displayed as the background the element. You can select an image by clicking the ellipsis button (...), or remove an image by clicking the X button. Using the **Background repeat** setti ng (below), you can control whether and how the image is repeated.
Background repeat	Controls whether the background is repeated horizontally or vertically, or both (tiled) or not at all.

Elements



Element	Controls...
Site	The overall background of your site. The background set here can be partially overridden by more localized background settings below.
Outer header	The top portion of the header area at the top. The background set here can be partially overridden for the center portion of the top header by the **Header** setting below.
Header	The background of the center portion of the outer header.
Outer header 1	The bottom portion of the header area. The background set here can be partially overridden for the center portion of the area by the **Header 1** setting below.
Header 1	The background of the center portion of bottom header area. This is a sticky placeholder that creates a non-scrolling area, suitable for sticky menus.
Outer sidebar	The background of the sidebar to the left of the **Content** area.
Sidebar	The background of the rightmost portion of the sidebar.
Outer content	The background of the main content area of the page. The background set here can be partially overridden for the center portion of the area by the **Content** setting below, and for the leftmost portion using the **Outer sidebar** and **Sidebar** settings above.
Content	The background of the center portion of the main content area.
Outer footer	The background of the top footer. The background set here can be partially overridden for the center portion of the top footer by the **Fo oter 1** setting below.
Footer	The background of the center portion of the top footer.

Outer footer 1	The background of the second footer area. The background set here can be partially overridden for the center portion of the top footer by the **Footer 1** setting below.
Footer 1	The background of the center portion of the second footer.

Typography

Controls the appearance of text formatted using text styles.

Element	Controls...
Normal	Appearance of text formatted using the **Normal** text style. Most – but not all – body text and text labels throughout your site are formatted using the Normal style. For linked text, the **Link** setting (below) will override the **Normal** setting.
Wide	Appearance of text formatted using the **Wide** text style.
Narrow	Appearance of text formatted using the **Narrow** text style.
Link	Appearance of text links. The **Link** setting will supercede the **Norm al** setting above for text links.
Link on hover	Appearance of the text links when a mouse pointer hovers over them.
Promo	Appearance of text formatted using the **Promo** text style.
Page title	Appearance of text formatted using the **Page title** text style.
H1	Appearance of headings formatted using the **H1** style.
H2	Appearance of headings formatted using the **H2** style.
H3	Appearance of headings formatted using the **H3** style. Examples include: • Section titles on event calendar gadgets • **Select membership level** heading on membership application gadgets • **Subscription form** heading on subscription form gadgets • **Donations** heading on donation gadgets • Captcha **Security check** heading
H4	Appearance of headings formatted using the **H4** style. Examples include: • Gadget titles • Blog post titles • Forum headings • Forum summary headings • Event names within event calendar • **Registration** heading within event details
H5	Appearance of headings formatted using the H5 style.
Quoted	Appearance of text formatted using the **Quoted text** style.
Text alternative	Appearance of text formatted using the **Alternative text** style.

Form

Element	Controls...

Labels	Appearance of field labels on forms such as event registration, email subscription, and membership application. If you do not specify settings here, the **General formatting > Text** settings (above) will be applied to form labels.
Option title	Appearance of text labels for radio buttons or check boxes, as well as level names and descriptions on membership application forms.
Caption	Appearance of headings on member details and member profile screens.
Field explanation	Appearance of field instructions added to form fields, as well as level descriptions on membership application forms.

Table

Controls the appearance of tables used to display database information in gadgets such as the member directory gadget. These settings do not control the appearance of tables you insert into content pages.

Element	Controls...
Header	Appearance of the column headings at the top of the table.
Table row	Appearance of rows within the table
Table row on hover	Background color of a row when a mouse pointer hovers over it.
Table links	Font color of text links within the table.
Table links on hover	Font color of text links within the table when a mouse pointer hovers over them.

Info box

Controls the appearance of the areas used to list information within gadgets.

Examples: upcoming events, event details, forum topics and messages

Element	Controls...
Links	Font color of text links within the info box.
Links on hover	Font color of text links within the info box when a mouse pointer hovers over them.
Header	Appearance of headings at the top of each info box.
Header on hover	Font color of text links with the info box heading when a mouse pointer hovers over them.

Box

Element	Controls...
Background color	Background color of boxes appearing on certain gadgets (e.g. blog gadgets).
Header	Appearance of the header area at the top of the box.
Header link	Appearance of links within the header area at the top of the box.
Header link on hover	Appearance of links within the header area at the top of the box when a mouse pointer hovers over them.

Label	Appearance of labels within the box.
Text	Appearance of text within the box.
Link	Appearance of links within the box.
Link on hover	Appearance of links within the box when a mouse pointer hovers over them.
Footer	Background color of the area at the bottom of the box.
Footer link	Appearance of links within the footer area.
Footer link on hover	Appearance of links within the footer area when a mouse pointer hovers over them.

List

Controls the appearance of text within lists such as the list of forum topics.

Element	Controls...
Text	Appearance of text within the list.
Link	Appearance of links within the list.
Link on hover	Appearance of links within the list when a mouse pointer hovers over them.
Row	Background color of rows within the list.
Highlighted row	Background color of highlighted row within the list.

Gadget styles

For each of the available gadget styles for this theme, you can customize the following elements:

Element	Controls...
Title	The appearance of the gadget title. You can specify text attributes for the title text, and a background color or image for the title bar. You can select a color from the drop-down palette or enter the hexadecimal code for the color. If you specify a background image – by clicking the ellipsis button (...) – you can use the **Backgroun d repeat** setting to control whether and how the image is repeated.
Body	The appearance of the gadget body. You can specify text attributes for the body text, and a background color or image for the body area. You can select a color from the drop-down palette or enter the hexadecimal code for the color. If you specify a background image – by clicking the ellipsis button (...) – you can use the **Back ground repeat** setting to control whether and how the image is repeated.
Link	Appearance of text links. The **Link** setting will supercede the **Text** s etting above for text links.
Link on hover	Appearance of the text links when a mouse pointer hovers over them.
Donation bar	The fill color of the donation progress bar. You can select a color from the drop-down palette or enter the hexadecimal code for the color.

Donation bar ground	The background color of the donation progress bar. You can select a color from the drop-down palette or enter the hexadecimal code for the color.
Date and time	Controls the appearance of the date and time labels within forum update gadgets and recent blog posts gadgets.
Location	Controls the appearance of the location label within upcoming events gadgets.
Author	Controls the appearance of the author label within forum update gadgets and recent blog posts gadgets.

Button styles

For each of the link button styles, you can customize the following elements:

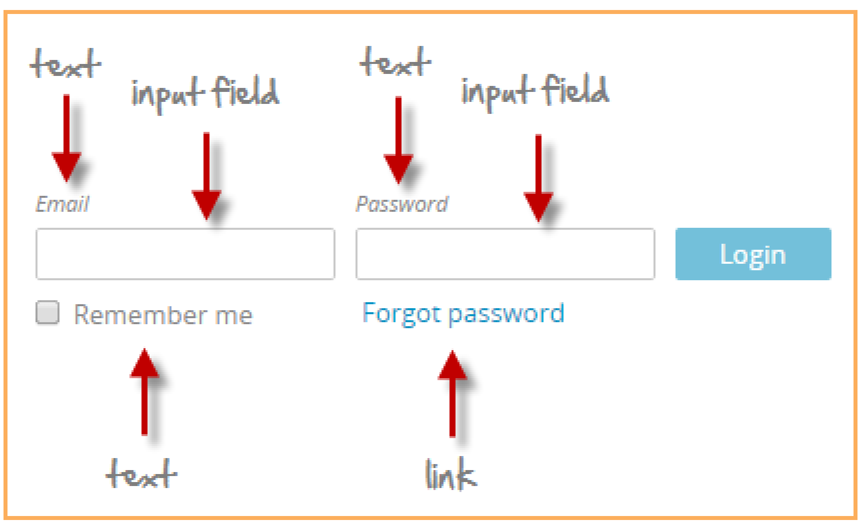
Element	Controls...
Normal	The appearance of the link button. You can specify text attributes for the button label, and a background color for the button. You can select a color from the drop-down palette or enter the hexadecimal code for the color.
Hover	The appearance of the link button when a mouse pointer hovers over it. You can specify text attributes for the button label, and a background color for the button. You can select a color from the drop-down palette or enter the hexadecimal code for the color.

Menu

Element	Controls...
Main	Font family and size of top-level menu items.
Drop down	Font family and size of drop-down menu items

Login box

These are the elements that appear within a log in form gadget.

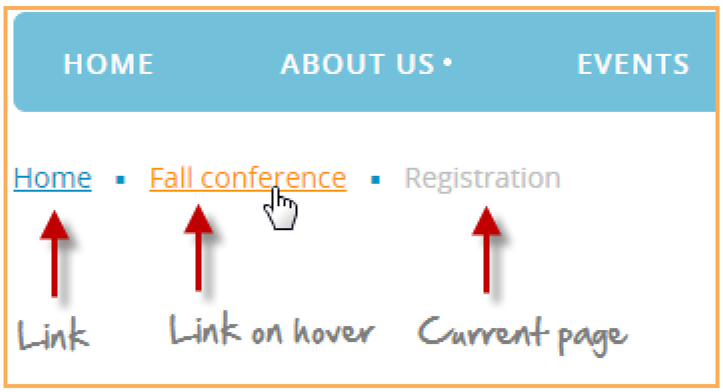


Element	Controls...

Input fields	Appearance of the login fields used to enter the username and password.
Text	Appearance of the text labels that accompany the login fields. If you do not specify settings here, the **General formatting > Typography > Text** settings (above) will be applied to the login box text labels. ***Examples:*** the **Remember me** checkbox label, the name of the logged in member
Links	Appearance of the text links that accompany the login fields. If you do not specify settings here, the **General formatting > Links** setti ngs (above) will be applied to login box links. ***Example:*** the **Forgot password** link
Links on hover	Appearance of the login links when a mouse pointer hovers over them. If you do not specify settings here, the **General formatting > Links on hover** settings (above) will be applied to login box links.

Breadcrumbs

These are the elements that appear within the breadcrumbs gadget.



Element	Controls...
General	Appearance of the breadcrumbs that show your current location within a set of subpages. If you do not specify settings here, the **Ge neral formatting > Typography> Text** settings (above) will be applied to the breadcrumbs.
Link	Color of the links within the breadcrumbs. If you do not specify settings here, the **General formatting > Links** settings (above) will be applied to the breadcrumb links.
Link on hover	Color of the breadcrumb links when a mouse pointer hovers over them. If you do not specify settings here, the **General formatting > Links on hover** settings (above) will be applied to the breadcrumb links.
Current page	Color of the current page within the breadcrumbs.

Navigation links

Controls the appearance of text links within navigation links gadgets.

Element	Controls...

Link	Font color of text links within navigation links.
Link on hover	Font color of navigation links when a mouse pointer hovers over them.

On this page:

See also:

- Customizing colors and styles
- Colors and styles settings by gadget

Color and style settings for Bookshelf and Whiteboard themes

Color and style settings for Bookshelf and Whiteboard themes

From the Colors and styles screen , you can change the colors and fonts of elements that appear throughout your site. To display the Colors and styles screen, click **Colors and styles** under the **Website** menu.

The Colors and styles screen lists the elements you can change along the left, and displays a preview of your changes on the right. Within the preview, you can click menu items and links to jump from page to page. Your changes won't be applied to the actual site until you click on **Sa ve**.

Settings for different elements are grouped into categories. The categories vary depending on the website theme you have chosen.

To expand the categories and view the elements within, click the plus sign beside the category name. For each element you can define a number of characteristics. If you select the **Automatic** option, the setting will be controlled by your website theme.

Some elements on your site can be controlled by more than one setting. For example, a heading formatted using the H4 style that's also a link can be controlled using either the **General formatting > H4** setting or the **General formatting > Link** setting.

Some elements are general settings than be overridden or superseded by more specific elements. For example, the **Site** background setting under **General formatting > Backgrounds** can be overridden at the top of the page by one of the header settings, or in the middle of the page using one of the content settings.

> The settings appearing on the Color and Styles screen, and their order and default values, can be customized for a particular theme using theme overrides. For more information, see Customizing Colors and Styles options for themes.

You can modify the following elements for Bookshelf and Whiteboard themes. (For a description of colors and styles settings for specific gadgets, see Colors and styles settings by gadget.)

General formatting

General formatting settings apply throughout your website but can be superseded by more specific settings. For example, your **General formatting > Link** settings can be overridden for breadcrumbs by your **Login box > Links** settings.

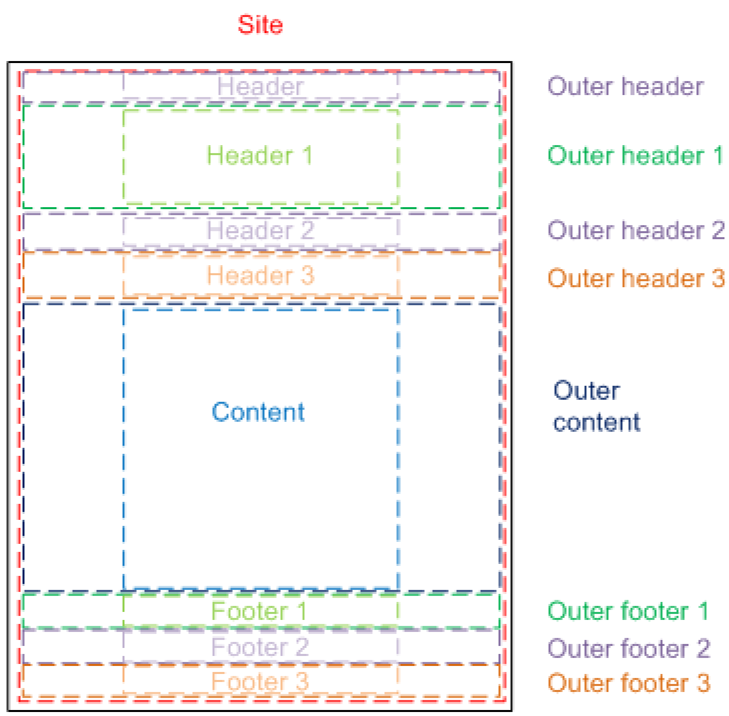
Backgrounds

For each of the elements below, you can control the following background attributes.

Attributes

Attribute	Description
Background color	The background color of the element. You can select a color from the drop-down palette or enter the hexadecimal code for the color (e.g. *#FF0000* for red).
Background image	An image to be displayed as the background the element. You can select an image by clicking the ellipsis button (...), or remove an image by clicking the X button. Using the **Background repeat** setti ng (below), you can control whether and how the image is repeated.
Background repeat	Controls whether the background is repeated horizontally or vertically, or both (tiled) or not at all.

Elements



Element	Controls...
Site	The overall background of your site. The background set here can be partially overridden by more localized background settings below.
Outer header	The background of the top portion of the header area. The background set here can be partially overridden for the center portion of the header by the **Header** setting below.
Header	The background of the center portion of the outer header.
Outer header 1	The background of the area directly below the outer header. The background set here can be partially overridden for the center portion of the area by the **Header 1** setting below.

Header 1	The background of the center portion of the area directly below the outer header.
Outer header 2	The background of the area directly below Header 1. The background set here can be partially overridden for the center portion of the area by the **Header 2** setting below.
Header 2	The background of the center portion of the area directly below Header 1.
Outer header 3	The background of the area directly below Header 2. The background set here can be partially overridden for the center portion of the area by the **Header 3** setting below.
Header 3	The background of the center portion of the area directly below Header 2.
Outer content	The background of the main content area of the page. The background set here can be partially overridden for the center portion of the area by the **Content** setting below, and for the leftmost portion using the **Outer sidebar** and **Sidebar** settings above.
Content	The background of the center portion of the main content area.
Outer footer 1	The background of the top footer. The background set here can be partially overridden for the center portion of the top footer by the **Footer 1** setting below.
Footer 1	The background of the center portion of the top footer.
Outer footer 2	The background of the second footer area. The background set here can be partially overridden for the center portion of the top footer by the **Footer 2** setting below.
Footer 2	The background of the center portion of the second footer.
Outer footer 3	The background of the third footer area. The background set here can be partially overridden for the center portion of the top footer by the **Footer 3** setting below.
Footer 3	The background of the center portion of the third footer.

Typography

Controls the appearance of text formatted using text styles.

Element	Controls...
Text	Appearance of text formatted using the **Normal** text style. Most – but not all – body text and text labels throughout your site are formatted using the Normal style. For linked text, the **Link** setting (below) will override the **Text** setting.
Narrow	Appearance of text formatted using the **Narrow** text style.
Link	Appearance of text links. The **Link** setting will supercede the **Text** setting above for text links.
Link on hover	Appearance of the text links when a mouse pointer hovers over them.
H1	Appearance of headings formatted using the **H1** style.
H2	Appearance of headings formatted using the **H2** style.

H3	Appearance of headings formatted using the **H3** style.
H4	Appearance of headings formatted using the H4 style.
Caption	Appearance of text formatted using the **Caption** style.
Quoted	Appearance of text formatted using the **Quoted text** style.
Smaller text	Appearance of text formatted using the **Smaller text** style.
Date and time	Controls the appearance of the date and time labels within forum update gadgets and recent blog posts gadgets.
Author	Controls the appearance of the author label within forum update gadgets and recent blog posts gadgets.
Location	Controls the appearance of the location label within upcoming events gadgets.
Event calendar title	Appearance of the **Upcoming events** and **Past events** headings on event calendars.

Form

Element	Controls...
Field labels	Appearance of field labels on forms such as event registration, email subscription, and membership application. If you do not specify settings here, the **General formatting > Text** settings (above) will be applied to form labels.
Option labels	Appearance of text labels for radio buttons or check boxes on forms.
Caption	Appearance of headings on member details and member profile screens.
Field instructions	Appearance of field instructions added to form fields.
Form instructions	Appearance of form instructions, such as "Select membership level", "Enter your email", "Mandatory fields", etc.
Divider	The color of the horizontal divider that separates the form instructions from the form fields.

Table

Controls the appearance of tables used to display database information in gadgets such as the member directory gadget. These settings do not control the appearance of forum tables, or tables you insert into content pages.

Element	Controls...
Column headings	Appearance of the column headings at the top of the table.
Table row	Appearance of rows within the table
Table row on hover	Background color of a row when a mouse pointer hovers over it.
Table links	Font color of text links within the table.
Table links on hover	Font color of text links within the table when a mouse pointer hovers over them.

Blog

You can control the following elements for blog and recent blog posts gadgets. Other elements can be controlled using Typography options (above).

Element	Controls...
Author	Controls the appearance of the author label.
Date and time	Controls the appearance of the date and time labels.

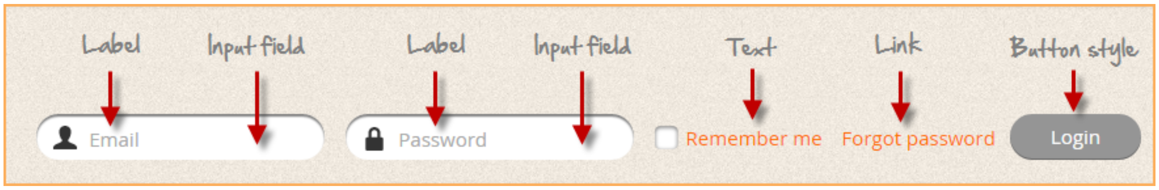
Forum

You can control the following elements for discussion forum gadgets and forum update gadgets. Other elements can be controlled using Typography options (above).

Element	Controls...
Forum category	Controls the appearance of the forum category in the forum summary.
Forum headings	Controls the appearance of the forum headings in the forum summary.
Header	Appearance of the column headings at the top of the forum summary.
Table row	Appearance of rows within the forum summary.
Table row on hover	Background color of a row when a mouse pointer hovers over it.
Table links	Font color of text links within the forum summary.
Table links on hover	Font color of text links within the forum summary when a mouse pointer hovers over them.
Author	Controls the appearance of the author label.
Date and time	Controls the appearance of the date and time labels.

Log in gadgets

These are the elements that appear within log in form and login in box gadgets.



Element	Controls...
Text	Appearance of the text labels that appear on the form. If you do not specify settings here, the **General formatting > Typography > Text** settings (above) will be applied to the login box text labels. ***Examples:*** the **Remember me** checkbox label, the name of the logged in member
Input fields	Appearance of the login fields used to enter the username and password.
Labels	Appearance of the labels that appear within or outside the login fields.

Links	Appearance of the text links that accompany the login fields. If you do not specify settings here, the **General formatting > Links** settings (above) will be applied to login box links. ***Example:*** the **Forgot password** link
Links on hover	Appearance of the login links when a mouse pointer hovers over them. If you do not specify settings here, the **General formatting > Links on hover** settings (above) will be applied to login box links.
Button style	Appearance of the login button, both normal and hover states.

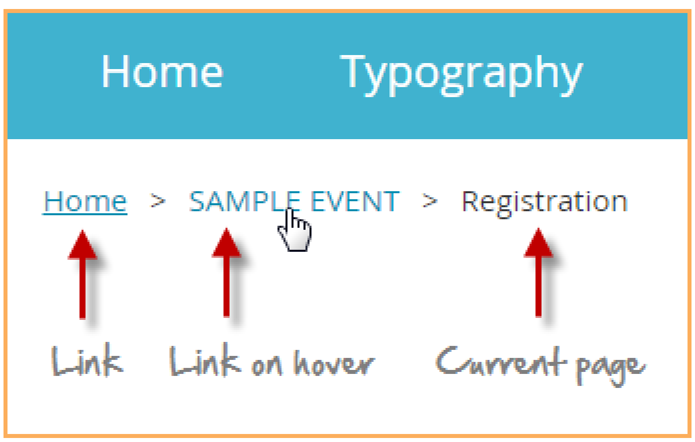
Button styles

For each of the link button styles, you can customize the following elements:

Element	Controls...
Normal	The appearance of the link button. You can specify text attributes for the button label, and a background color for the button. You can select a color from the drop-down palette or enter the hexadecimal code for the color.
Hover	The appearance of the link button when a mouse pointer hovers over it. You can specify text attributes for the button label, and a background color for the button. You can select a color from the drop-down palette or enter the hexadecimal code for the color.

Breadcrumbs

These are the elements that appear within the breadcrumbs gadget.



Element	Controls...
General	Appearance of the breadcrumbs that show your current location within a set of subpages. If you do not specify settings here, the **General formatting > Typography> Text** settings (above) will be applied to the breadcrumbs.
Link	Color of the links within the breadcrumbs. If you do not specify settings here, the **General formatting > Links** settings (above) will be applied to the breadcrumb links.

Link on hover	Color of the breadcrumb links when a mouse pointer hovers over them. If you do not specify settings here, the **General formatting > Links on hover** settings (above) will be applied to the breadcrumb links.
Current page	Color of the current page within the breadcrumbs.

Navigation links

Controls the appearance of text links within navigation links gadgets.

Element	Controls...
Link	Font color of text links within navigation links.
Link on hover	Font color of navigation links when a mouse pointer hovers over them.

On this page:

See also:

- Customizing colors and styles
- Colors and styles settings by gadget

Color and style settings for Business Casual themes

Color and style settings for Business Casual themes

From the Colors and styles screen, you can change the colors and fonts of elements that appear throughout your site. To display the Colors and styles screen, click **Colors and styles** under the **Website** menu.

The Colors and styles screen lists the elements you can change along the left, and displays a preview of your changes on the right. Within the preview, you can click menu items and links to jump from page to page. Your changes won't be applied to the actual site until you click on **Sa ve**.

Settings for different elements are grouped into categories. The categories vary depending on the website theme you have chosen.

To expand the categories and view the elements within, click the plus sign beside the category name. For each element you can define a number of characteristics. If you select the **Automatic** option, the setting will be controlled by your website theme.

Some elements on your site can be controlled by more than one setting. For example, a heading formatted using the H4 style that's also a link can be controlled using either the **General formatting > H4** setting or the **General formatting > Link** setting.

Some elements are general settings than be overridden or superseded by more specific elements. For example, the **General formatting > Link** setting can be overridden for breadcrumbs by the **Breadcrumbs > Link** setting.

You can modify the following elements for Business Casual themes. (For a description of colors and styles settings for specific gadgets, see Colors and styles settings by gadget.)

Site

Element	Controls...
Content	Background color of your site.

General formatting

Typography

Element	Controls...
Text	Appearance of most – but not all – body text and text labels throughout your site. For linked text, the **Link** setting (below) will override the **Text** setting.
Link	Appearance of text links. The **Link** setting will supercede the **Text** s etting above for text links.
Link on hover	Appearance of the text links when a mouse pointer hovers over them.
H1	Appearance of headings formatted using the H1 style. These headings appear in HTML code within <h1> tags and can be applied using the **Text style** drop-down when editing a content gadget.
H1 Alternative	Appearance of headings formatted using the H1 Alternative style. These headings appear in HTML code within <h1 class="contStyleExcHeadingColored"> tags.
H2	Appearance of headings formatted using the H2 style. These headings appear in HTML code within <h1> tags.
H2 Alternative	Appearance of headings formatted using the H2 Alternative style. These headings appear in HTML code within <h2 class="contStyleExcHeadingColored"> tags.
H3	Appearance of headings formatted using the H3 style. Examples include: • Section titles on event calendar gadgets • **Select membership level** heading on membership application gadgets • **Subscription form** heading on subscription form gadgets • **Donations** heading on donation gadgets • Captcha **Security check** heading
H3 Alternative	Appearance of headings formatted using the H3 Alternative style. These headings appear in HTML code within <h3 class="contStyleExcHeadingColored"> tags.
H4	Appearance of headings formatted using the H4 style. Examples include: • Gadget titles • Blog post titles • Forum headings • Forum summary headings • Event names within event calendar • **Registration** heading within event details
H4 Alternative	Appearance of headings formatted using the H4 Alternative style. These headings appear in HTML code within <h4 class="contStyleExcHeadingColored"> tags.

Text alt color 1	Appearance of text formatted using the Alt color 1 style. The text will appear in the HTML code within <span class="contStyleExcInlineColored1"> tags.
Text alt color 2	Appearance of text formatted using the Alt color 2 style. The text will appear in the HTML code within <span class="contStyleExcInlineColored2"> tags.
Text alt highlighted	Appearance of text formatted using the Alt highlighted style. The text will appear in the HTML code within <span class="contStyleExcInlineHighlighted"> tags.
Page title	Appearance of text formatted using the Page title style. The text will appear in the HTML code within <span class="pageTitle"> tags.
Quoted	Appearance of text formatted using the Quoted style. The text will appear in the HTML code within <span class="quotedText"> tags.

Form

Element	Controls...
Labels	Appearance of field labels on forms such as event registration, email subscription, and membership application. If you do not specify settings here, the **General formatting > Text** settings (above) will be applied to form labels.
Option title	Appearance of text labels for radio buttons or check boxes, as well as level names and descriptions on membership application forms.
Caption	Appearance of headings on member details and member profile screens.
Field explanation	Appearance of field instructions added to form fields, as well as level descriptions on membership application forms.

Table

Controls the appearance of tables used to display database information in gadgets such as the member directory gadget. These settings do not control the appearance of tables you insert into content pages.

Element	Controls...
Header	Appearance of the column headings at the top of the table.
Table row	Appearance of rows within the table
Table row on hover	Background color of a row when a mouse pointer hovers over it.
Table links	Font color of text links within the table.
Table links on hover	Font color of text links within the table when a mouse pointer hovers over them.

Info box

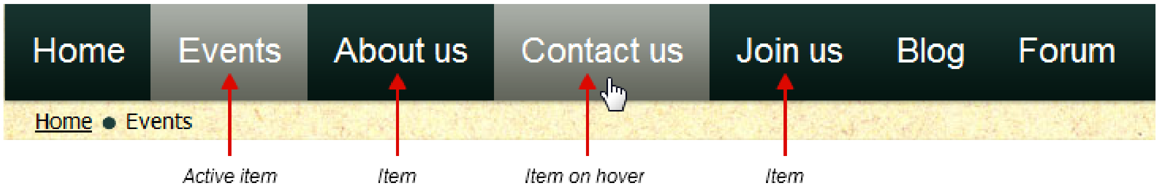
Appearance of the areas used by gadgets to list information.

Examples: upcoming events, event details, forum topics and messages

Element	Controls...
Links	Font color of text links within the info box.

Links on hover	Font color of text links within the info box when a mouse pointer hovers over them.
Header	Appearance of headings at the top of each info box.
Header on hover	Font color of text links with the info box heading when a mouse pointer hovers over them.

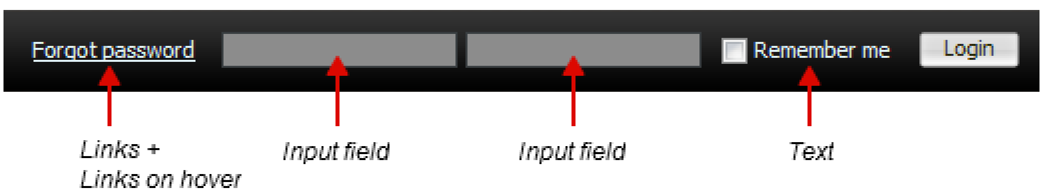
Menu



Element	Controls...
Item	Appearance of menu items, both active and inactive. You can separately control the font color and background color of active menu items using the **Active item** setting below.
Item on hover	Font color and background color of inactive menu items when the mouse pointer hovers over them.
Active item	Font color and background color of active menu items.

Login box

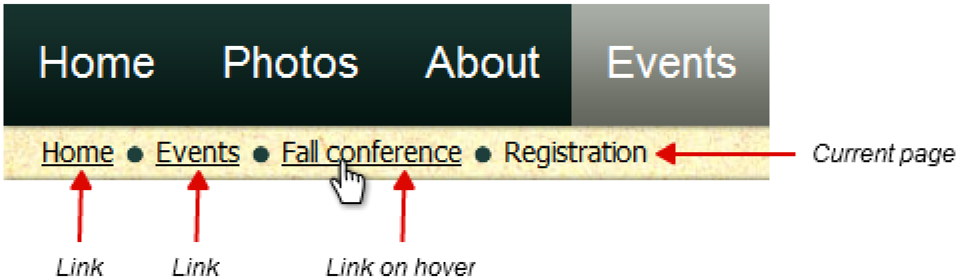
These are the elements that appear within a log in form gadget.



Element	Controls...
Input fields	Appearance of the login fields used to enter the username and password.
Text	Appearance of the text labels that accompany the login fields. If you do not specify settings here, the **General formatting > Text** s ettings (above) will be applied to the login box text labels. ***Examples:*** the **Remember me** checkbox label, the name of the logged in member
Links	Appearance of the text links that accompany the login fields. If you do not specify settings here, the **General formatting > Link** settin gs (above) will be applied to login box links. ***Example:*** the **Forgot password** link
Links on hover	Appearance of the login links when a mouse pointer hovers over them. If you do not specify settings here, the **General formatting > Link on hover** settings (above) will be applied to login box links.

Breadcrumbs

These are the elements that appear within the breadcrumbs gadget.



Element	Controls...
General	Appearance of the breadcrumbs that show your current location within a set of subpages. If you do not specify settings here, the **Ge neral formatting > Text** settings (above) will be applied to the breadcrumbs.
Link	Color of the links within the breadcrumbs. If you do not specify settings here, the **General formatting > Link** settings (above) will be applied to the breadcrumb links.
Link on hover	Color of the breadcrumb links when a mouse pointer hovers over them. If you do not specify settings here, the **General formatting > Link on hover** settings (above) will be applied to the breadcrumb links.
Current page	Color of the current page within the breadcrumbs.

The settings appearing on the Color and Styles screen, and their order and default values, can be customized for a particular theme using theme overrides. For more information, see Customizing Colors and Styles options for themes.

On this page:

See also:

- Customizing colors and styles
- Colors and styles settings by gadget

Color and style settings for Clean Lines, White Space, Dark Impact themes

Color and style settings for Clean Lines, White Space, Dark Impact themes

From the Colors and styles screen , you can change the colors and fonts of elements that appear throughout your site. To display the Colors and styles screen, click **Colors and styles** under the **Website** menu.

The Colors and styles screen lists the elements you can change along the left, and displays a preview of your changes on the right. Within the preview, you can click menu items and links to jump from page to page. Your changes won't be applied to the actual site until you click on **Sa ve**.

Settings for different elements are grouped into categories. The categories vary depending on the website theme you have chosen.

To expand the categories and view the elements within, click the plus sign beside the category name. For each element you can define a number of characteristics. If you select the **Automatic** option, the setting will be controlled by your website theme.

Some elements on your site can be controlled by more than one setting. For example, a heading formatted using the H4 style that's also a link can be controlled using either the **General formatting > H4** setting or the **General formatting > Link** setting.

Some elements are general settings than be overridden or superseded by more specific elements. For example, the **Site** background setting under **General formatting > Backgrounds** can be overridden at the top of the page by one of the header settings, or in the middle of the page using one of the content settings.

> The settings appearing on the Color and Styles screen, and their order and default values, can be customized for a particular theme using theme overrides. For more information, see Customizing Colors and Styles options for themes.

You can modify the following elements for Clean Lines, White Space, and Dark Impact themes. (For a description of colors and styles settings for specific gadgets, see Colors and styles settings by gadget.)

General formatting

General formatting settings apply throughout your website but can be superseded by more specific settings. For example, your **General formatting > Link** settings can be overridden for breadcrumbs by your **Login box > Links** settings.

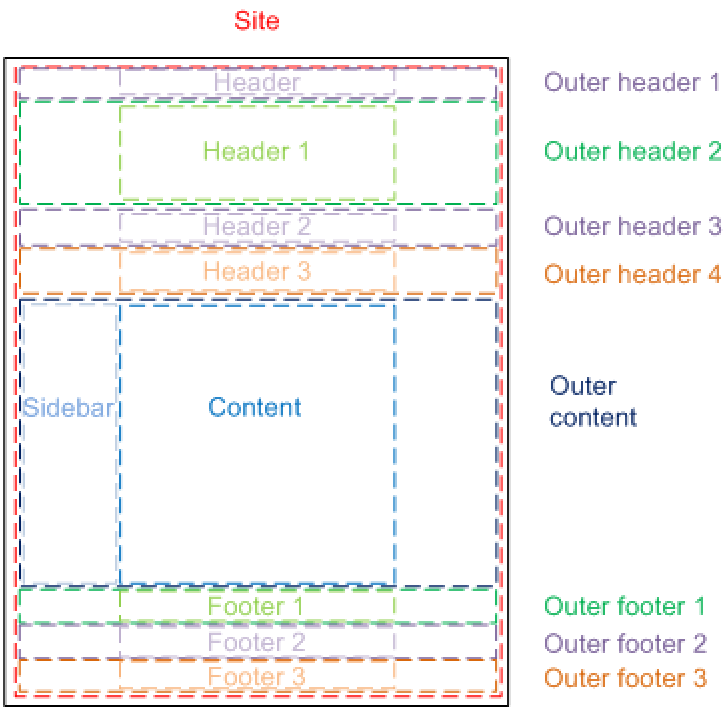
Backgrounds

For each of the elements below, you can control the following background attributes.

Attributes

Attribute	Description
Background color	The background color of the element. You can select a color from the drop-down palette or enter the hexadecimal code for the color (e.g. *#FF0000* for red).
Background image	An image to be displayed as the background the element. You can select an image by clicking the ellipsis button (...), or remove an image by clicking the X button. Using the **Background repeat** setti ng (below), you can control whether and how the image is repeated.
Background repeat	Controls whether the background is repeated horizontally or vertically, or both (tiled) or not at all.

Elements



Element	Controls...
Site	The overall background of your site. The background set here can be partially overridden by more localized background settings below.
Outer header 1	The background of the top portion of the header area. The background set here can be partially overridden for the center portion of the header by the **Header 1** setting below.
Header 1	The background of the center portion of the outer header.
Outer header 2	The background of the area directly below Outer header 1. The background set here can be partially overridden for the center portion of the area by the **Header 2** setting below.
Header 2	The background of the center portion of the area directly below Outer header 1.
Outer header 3	The background of the area directly below Header 2. The background set here can be partially overridden for the center portion of the area by the **Header 3** setting below.
Header 3	The background of the center portion of the area directly below Header 2.
Outer header 4	The background of the area directly below Header 3. The background set here can be partially overridden for the center portion of the area by the **Header 4** setting below.
Header 4	The background of the center portion of the area directly below Header 3.
Outer sidebar	The background of the sidebar to the left of the **Content** area.
Sidebar	The background of the rightmost portion of the sidebar.

Outer content	The background of the main content area of the page. The background set here can be partially overridden for the center portion of the area by the **Content** setting below, and for the leftmost portion using the **Outer sidebar** and **Sidebar** settings above.
Content	The background of the center portion of the main content area.
Outer footer 1	The background of the top footer. The background set here can be partially overridden for the center portion of the top footer by the **Fo oter 1** setting below.
Footer 1	The background of the center portion of the top footer.
Outer footer 2	The background of the second footer area. The background set here can be partially overridden for the center portion of the top footer by the **Footer 2** setting below.
Footer 2	The background of the center portion of the second footer.
Outer footer 3	The background of the third footer area. The background set here can be partially overridden for the center portion of the top footer by the **Footer 3** setting below.
Footer 3	The background of the center portion of the third footer.

Typography

Controls the appearance of text formatted using text styles.

Element	Controls...
Text	Appearance of text formatted using the **Normal** text style. Most – but not all – body text and text labels throughout your site are formatted using the Normal style. For linked text, the **Link** setting (below) will override the **Text** setting.
Wide	Appearance of text formatted using the **Wide** text style.
Narrow	Appearance of text formatted using the **Narrow** text style.
Link	Appearance of text links. The **Link** setting will supercede the **Text** s etting above for text links.
Link on hover	Appearance of the text links when a mouse pointer hovers over them.
Page title	Appearance of text formatted using the **Page title** text style.
Heading 1	Appearance of headings formatted using the **H1** style.
Heading 2	Appearance of headings formatted using the **H2** style.
Heading 3	Appearance of headings formatted using the **H3** style.
Heading 4	Appearance of headings formatted using the **H4** style.
Heading 5	Appearance of headings formatted using the **H5** style.
Heading 6	Appearance of headings formatted using the **H6** style.
Quoted	Appearance of text formatted using the **Quoted text** style.
Text highlighted	Appearance of text formatted using the **Text highlighted** style.

Event calendar title	Appearance of the **Upcoming events** and **Past events** headings on event calendars.

Form

Element	Controls...
Field labels	Appearance of field labels on forms such as event registration, email subscription, and membership application. If you do not specify settings here, the **General formatting > Text** settings (above) will be applied to form labels.
Option labels	Appearance of text labels for radio buttons or check boxes on forms.
Caption	Appearance of headings on member details and member profile screens.
Field instructions	Appearance of field instructions added to form fields.
Form instructions	Appearance of form instructions, such as "Select membership level", "Enter your email", "Mandatory fields", etc.
Divider	The color of the horizontal divider that separates the form instructions from the form fields.

Gadgets

For each of the available gadget styles for this theme, you can customize the following elements:

Element	Controls...
Background	The gadget's background color. You can select a color from the drop-down palette or enter the hexadecimal code for the color.
Title	Appearance of the gadget title. You can select a font family for the title text, and a background color or image for the title bar. You can select a color from the drop-down palette or enter the hexadecimal code for the color. If you specify a background image – by clicking the ellipsis button (...) – you can use the **Background repeat** setti ng to control whether and how the image is repeated.
Date and time	Appearance of the date and time labels within forum update gadgets and recent blog posts gadgets.
Author	Appearance of the author label within forum update gadgets and recent blog posts gadgets.
Location	Appearance of the location label within upcoming events gadgets.
Donation bar	Fill color of the donation progress bar within donation goal gadgets. You can select a color from the drop-down palette or enter the hexadecimal code for the color.
Donation bar ground	Outline color of the donation progress bar within donation goal gadgets. You can select a color from the drop-down palette or enter the hexadecimal code for the color.
Donation labels	Appearance of the **Goal** and **Collected** labels within donation goal gadgets.
Donation goal	Appearance of the **Goal** value within donation goal gadgets.
Donation collected	Appearance of the **Collected** value within donation goal gadgets.

Donation description	Appearance of the description assigned to the donation goal gadget.
Donation button	Font and background color of the **Donate** button within donation goal gadgets.
Donation button hover	Font and background color of the **Donate** button when a mouse pointer hovers over it.

Table

Controls the appearance of tables used to display database information in gadgets such as the member directory gadget. These settings do not control the appearance of forum tables, or tables you insert into content pages.

Element	Controls...
Column headings	Appearance of the column headings at the top of the table.
Table row	Appearance of rows within the table
Table row on hover	Background color of a row when a mouse pointer hovers over it.
Table links	Font color of text links within the table.
Table links on hover	Font color of text links within the table when a mouse pointer hovers over them.

Blog

You can control the following elements for blog and recent blog posts gadgets. Other elements can be controlled using Typography options (above).

Element	Controls...
Author	Appearance of the author label.
Date and time	Appearance of the date and time labels.
Links	Color of links within the blog.
Icons	Color of the icons used within blog post gadgets on the mobile version.

Forum

You can control the following elements for discussion forum gadgets, forum update gadgets, and forum summary gadgets. Other elements can be controlled using Typography options (above).

Element	Controls...
Forum category	Controls the appearance of the forum category.
Column headings	Controls the appearance of the forum headings.
Table row	Appearance of rows within the table listing the forum topics.
Table row on hover	Background color of a row when a mouse pointer hovers over it.
Table links	Font color of text links.
Table links on hover	Font color of text links when a mouse pointer hovers over them.
Author	Controls the appearance of the author label.
Date and time	Controls the appearance of the date and time labels.

Icons	The color of the icons within discussion forum and forum summary gadgets on the mobile version.

Log in gadgets

These are the elements that appear within log in form and login in box gadgets.

Element	Controls...
Text	Appearance of the text labels that appear on the form. If you do not specify settings here, the **General formatting > Typography > Text** settings (above) will be applied to the login box text labels. ***Examples:*** the **Remember me** checkbox label, the name of the logged in member
Input fields	Appearance of the login fields used to enter the username and password.
Labels	Appearance of the labels that appear within or outside the login fields.
Links	Appearance of the text links that accompany the login fields. If you do not specify settings here, the **General formatting > Links** setti ngs (above) will be applied to login box links. ***Example:*** the **Forgot password** link
Links on hover	Appearance of the login links when a mouse pointer hovers over them. If you do not specify settings here, the **General formatting > Links on hover** settings (above) will be applied to login box links.
Button	Appearance of the login button.

Button styles

For each of the link button styles, you can customize the following elements:

Element	Controls...
Normal	The appearance of the link button. You can specify text attributes for the button label, and a background color for the button. You can select a color from the drop-down palette or enter the hexadecimal code for the color.
Hover	The appearance of the link button when a mouse pointer hovers over it. You can specify text attributes for the button label, and a background color for the button. You can select a color from the drop-down palette or enter the hexadecimal code for the color.

Functional buttons

For the functional (aka command) buttons appearing on system gadgets and singular gadgets – e.g. Next, Cancel, Register, Confirm – you can customize the following elements:

Element	Controls...
Normal	The background color of the button. You can select a color from the drop-down palette or enter the hexadecimal code for the color.

Hover	The background color of the button when a mouse pointer hovers over it. You can select a color from the drop-down palette or enter the hexadecimal code for the color.

Breadcrumbs

These are the elements that appear within the breadcrumbs gadget.

Element	Controls...
General	Appearance of the breadcrumbs that show your current location within a set of subpages. If you do not specify settings here, the **General formatting > Typography> Text** settings (above) will be applied to the breadcrumbs.
Link	Color of the links within the breadcrumbs. If you do not specify settings here, the **General formatting > Links** settings (above) will be applied to the breadcrumb links.
Link on hover	Color of the breadcrumb links when a mouse pointer hovers over them. If you do not specify settings here, the **General formatting > Links on hover** settings (above) will be applied to the breadcrumb links.
Current page	Color of the current page within the breadcrumbs.

Navigation links

Controls the appearance of text links within navigation links gadgets.

Element	Controls...
Link	Font color of text links within navigation links.

Menu

For each menu style, you can customize the following menu elements.

Element	Controls...
Main	Font family and background color of top-level menu items. The background color will apply to both desktop and mobile versions, but the font family will apply only to the desktop version.
Drop down	Font family and color of drop-down menu items. The background color will apply to both desktop and mobile versions, but the font family will apply only to the desktop version.

On this page:

- Menu

See also:

- Customizing colors and styles
- Colors and styles settings by gadget
- Color and style settings for Clean Lines, White Space, Dark Impact themes (deprecated)

Color and style settings for Fiesta themes

Color and style settings for Fiesta themes

From the Colors and styles screen, you can change the colors and fonts of elements that appear throughout your site. To display the Colors and styles screen, click **Colors and styles** under the **Website** menu.

The Colors and styles screen lists the elements you can change along the left, and displays a preview of your changes on the right. Within the preview, you can click menu items and links to jump from page to page. Your changes won't be applied to the actual site until you click on **Save**.

Settings for different elements are grouped into categories. The categories vary depending on the website theme you have chosen.

To expand the categories and view the elements within, click the plus sign beside the category name. For each element you can define a number of characteristics. If you select the **Automatic** option, the setting will be controlled by your website theme.

Some elements on your site can be controlled by more than one setting. For example, a heading formatted using the H4 style that's also a link can be controlled using either the **General formatting > H4** setting or the **General formatting > Link** setting.

Some elements are general settings than be overridden or superseded by more specific elements. For example, the **Site** background setting under **General formatting > Backgrounds** can be overridden at the top of the page by one of the header settings, or in the middle of the page using one of the content settings.

> The settings appearing on the Color and Styles screen, and their order and default values, can be customized for a particular theme using theme overrides. For more information, see Customizing Colors and Styles options for themes.

You can modify the following elements for Fiesta themes. (For a description of colors and styles settings for specific gadgets, see Colors and styles settings by gadget.)

General formatting

General formatting settings apply throughout your website but can be superseded by more specific settings. For example, your **General formatting > Link** settings can be overridden for breadcrumbs by your **Login box > Links** settings.

Backgrounds

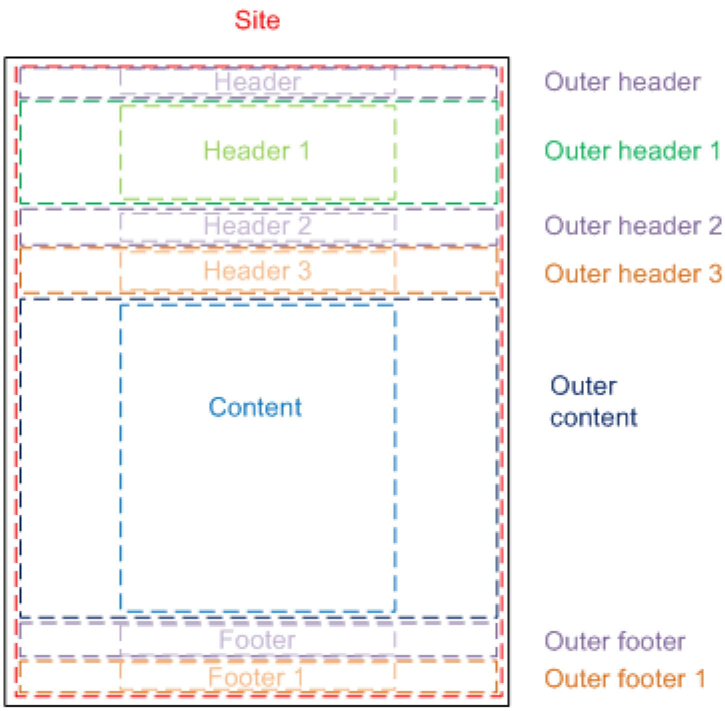
For each of the elements below, you can control the following background attributes.

Attributes

Attribute	Description
Background color	The background color of the element. You can select a color from the drop-down palette or enter the hexadecimal code for the color (e.g. *#FF0000* for red).
Background image	An image to be displayed as the background the element. You can select an image by clicking the ellipsis button (...), or remove an image by clicking the X button. Using the **Background repeat** setting (below), you can control whether and how the image is repeated.

Background repeat	Controls whether the background is repeated horizontally or vertically, or both (tiled) or not at all.

Elements



Element	Controls...
Site	The overall background of your site. The background set here can be partially overridden by more localized background settings below.
Outer header	The background of the top portion of the header area. The background set here can be partially overridden for the center portion of the header by the **Header** setting below.
Header	The background of the center portion of the outer header.
Outer header 1	The background of the area directly below the outer header. The background set here can be partially overridden for the center portion of the area by the **Header 1** setting below.
Header 1	The background of the center portion of the area directly below the outer header.
Outer header 2	The background of the area directly below Header 1. The background set here can be partially overridden for the center portion of the area by the **Header 2** setting below.
Header 2	The background of the center portion of the area directly below Header 1. This is the sticky placeholder that creates a non-scrolling area, suitable for sticky menus.
Outer header 3	The background of the area directly below Header 2. The background set here can be partially overridden for the center portion of the area by the **Header 3** setting below.
Header 3	The background of the center portion of the area directly below Header 2.

Outer content	The background of the main content area of the page. The background set here can be partially overridden for the center portion of the area by the **Content** setting below.
Content	The background of the center portion of the main content area.
Outer footer	The background of the top footer area. The background set here can be partially overridden for the center portion of the top footer by the **Footer** setting below.
Footer	The background of the center portion of the top footer.
Outer footer 1	The background of the second footer area. The background set here can be partially overridden for the center portion of the top footer by the **Footer 1** setting below.
Footer 1	The background of the center portion of the second footer.

Typography

Controls the appearance of text formatted using text styles.

Element	Controls...
Normal	Appearance of text formatted using the **Normal** text style. Most – but not all – body text and text labels throughout your site are formatted using the Normal style. For linked text, the **Link** setting (below) will override the **Text** setting.
Narrow	Appearance of text formatted using the **Narrow** text style.
Link	Appearance of text links. The **Link** setting will supercede the **Text** s etting above for text links.
Link on hover	Appearance of the text links when a mouse pointer hovers over them.
Page title	Appearance of text formatted using the **Page title** text style.
Page subtitle	Appearance of text formatted using the **Page subtitle** text style.
Heading 1	Appearance of headings formatted using the **H1** style.
Heading 2	Appearance of headings formatted using the **H2** style.
Heading 3	Appearance of headings formatted using the **H3** style.
Heading 4	Appearance of headings formatted using the **H4** style.
Smaller	Appearance of text formatted using the **Smaller text** style.
Text alternative	Appearance of text formatted using the **Text alternative** style.
Event calendar title	Appearance of the **Upcoming events** and **Past events** headings on event calendars.

Form

Element	Controls...
Field labels	Appearance of field labels on forms such as event registration, email subscription, and membership application. If you do not specify settings here, the **General formatting > Text** settings (above) will be applied to form labels.

Option labels	Appearance of text labels for radio buttons or check boxes on forms.
Caption	Appearance of headings on member details and member profile screens.
Field instructions	Appearance of field instructions added to form fields.
Form instructions	Appearance of form instructions, such as "Select membership level", "Enter your email", "Mandatory fields", etc.
Divider	The color of the horizontal divider that separates the form instructions from the form fields.

Gadgets

For each of the available gadget styles for this theme, you can customize the following elements:

Element	Controls...
Background	The gadget's background color. You can select a color from the drop-down palette or enter the hexadecimal code for the color.
Title	Appearance of the gadget title. You can select a font family for the title text, and a background color or image for the title bar. You can select a color from the drop-down palette or enter the hexadecimal code for the color. If you specify a background image – by clicking the ellipsis button (...) – you can use the **Background repeat** setti ng to control whether and how the image is repeated.
Date and time	Appearance of the date and time labels within forum update gadgets and recent blog posts gadgets.
Author	Appearance of the author label within forum update gadgets and recent blog posts gadgets.
Location	Appearance of the location label within upcoming events gadgets.
Donation bar	Fill color of the donation progress bar within donation goal gadgets. You can select a color from the drop-down palette or enter the hexadecimal code for the color.
Donation bar ground	Outline color of the donation progress bar within donation goal gadgets. You can select a color from the drop-down palette or enter the hexadecimal code for the color.
Donation labels	Appearance of the **Goal** and **Collected** labels within donation goal gadgets.
Donation goal	Appearance of the **Goal** value within donation goal gadgets.
Donation collected	Appearance of the **Collected** value within donation goal gadgets.
Donation description	Appearance of the description assigned to the donation goal gadget.
Donation button	Font and background color of the **Donate** button within donation goal gadgets.
Donation button hover	Font and background color of the **Donate** button when a mouse pointer hovers over it.

Table

Controls the appearance of tables used to display database information in gadgets such as the member directory gadget. These settings do not control the appearance of forum tables, or tables you insert into content pages.

Element	Controls...
Column headings	Appearance of the column headings at the top of the table.
Table row	Appearance of rows within the table
Table row on hover	Background color of a row when a mouse pointer hovers over it.
Table links	Font color of text links within the table.
Table links on hover	Font color of text links within the table when a mouse pointer hovers over them.

Blog

You can control the following elements for blog and recent blog posts gadgets. Other elements can be controlled using Typography options (above).

Element	Controls...
Author	Controls the appearance of the author label.
Date and time	Controls the appearance of the date and time labels.
Icons	The color of the icons used within blog post gadgets on the mobile version.

Forum

You can control the following elements for discussion forum gadgets, forum update gadgets, and forum summary gadgets. Other elements can be controlled using Typography options (above).

Element	Controls...
Forum category	Controls the appearance of the forum category.
Column headings	Controls the appearance of the forum headings.
Table row	Appearance of rows within the table listing the forum topics.
Table row on hover	Background color of a row when a mouse pointer hovers over it.
Table links	Font color of text links.
Table links on hover	Font color of text links when a mouse pointer hovers over them.
Author	Controls the appearance of the author label.
Date and time	Controls the appearance of the date and time labels.

Log in gadgets

These are the elements that appear within log in form and login in box gadgets.

Element	Controls...
Text	Appearance of the text labels that appear on the form. If you do not specify settings here, the **General formatting > Typography > Text** settings (above) will be applied to the login box text labels. ***Examples:*** the **Remember me** checkbox label, the name of the logged in member

Input fields	Appearance of the login fields used to enter the username and password.
Labels	Appearance of the labels that appear within or outside the login fields.
Links	Appearance of the text links that accompany the login fields. If you do not specify settings here, the **General formatting > Links** settings (above) will be applied to login box links. ***Example:*** the **Forgot password** link
Links on hover	Appearance of the login links when a mouse pointer hovers over them. If you do not specify settings here, the **General formatting > Links on hover** settings (above) will be applied to login box links.
Button	Appearance of the login button.

Button styles

For each of the link button styles, you can customize the following elements:

Element	Controls...
Normal	The appearance of the link button. You can specify text attributes for the button label, and a background color for the button. You can select a color from the drop-down palette or enter the hexadecimal code for the color.
Hover	The appearance of the link button when a mouse pointer hovers over it. You can specify text attributes for the button label, and a background color for the button. You can select a color from the drop-down palette or enter the hexadecimal code for the color.

Functional buttons

For the functional (aka command) buttons appearing on system gadgets and singular gadgets – e.g. Next, Cancel, Register, Confirm – you can customize the following elements:

Element	Controls...
Normal	The background color of the button. You can select a color from the drop-down palette or enter the hexadecimal code for the color.
Hover	The background color of the button when a mouse pointer hovers over it. You can select a color from the drop-down palette or enter the hexadecimal code for the color.

Breadcrumbs

These are the elements that appear within the breadcrumbs gadget.

Element	Controls...
General	Appearance of the breadcrumbs that show your current location within a set of subpages. If you do not specify settings here, the **General formatting > Typography> Text** settings (above) will be applied to the breadcrumbs.
Link	Color of the links within the breadcrumbs. If you do not specify settings here, the **General formatting > Links** settings (above) will be applied to the breadcrumb links.
Link on hover	Color of the breadcrumb links when a mouse pointer hovers over them. If you do not specify settings here, the **General formatting > Links on hover** settings (above) will be applied to the breadcrumb links.
Current page	Color of the current page within the breadcrumbs.

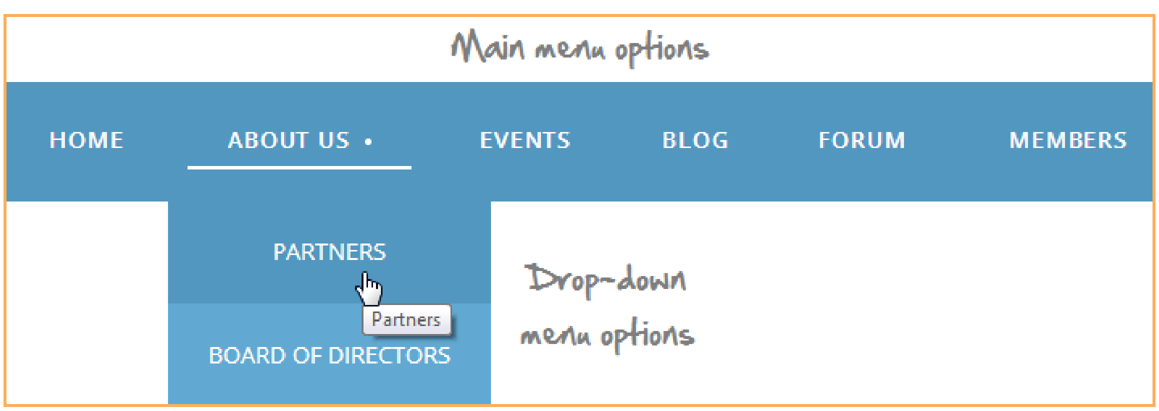
Navigation links

Controls the appearance of text links within navigation links gadgets.

Element	Controls...
Link	Font color of text links within navigation links.
Link on hover	Font color of navigation links when a mouse pointer hovers over them.

Menu

For each menu style, you can customize the following menu elements.



Element	Controls...
Main	Font family and background color of top-level menu items. The background color will apply to both desktop and mobile versions, but the font family will apply only to the desktop version.
Drop down	Font family and color of drop-down menu items. The background color will apply to both desktop and mobile versions, but the font family will apply only to the desktop version.

On this page:

See also:

- Customizing colors and styles
- Colors and styles settings by gadget
- Color and style settings for Fiesta themes (deprecated)

Color and style settings for Homestead themes

Color and style settings for Homestead themes

From the Colors and styles screen, you can change the colors and fonts of elements that appear throughout your site. To display the Colors and styles screen, click **Colors and styles** under the **Website** menu.

The Colors and styles screen lists the elements you can change along the left, and displays a preview of your changes on the right. Within the preview, you can click menu items and links to jump from page to page. Your changes won't be applied to the actual site until you click on **Sa ve**.

Settings for different elements are grouped into categories. The categories vary depending on the website theme you have chosen.

To expand the categories and view the elements within, click the plus sign beside the category name. For each element you can define a number of characteristics. If you select the **Automatic** option, the setting will be controlled by your website theme.

Some elements on your site can be controlled by more than one setting. For example, a heading formatted using the H4 style that's also a link can be controlled using either the **General formatting > H4** setting or the **General formatting > Link** setting.

Some elements are general settings than be overridden or superseded by more specific elements. For example, the **Site** background setting under **General formatting > Backgrounds** can be overridden at the top of the page by one of the header settings, or in the middle of the page using one of the content settings.

> The settings appearing on the Color and Styles screen, and their order and default values, can be customized for a particular theme using theme overrides. For more information, see Customizing Colors and Styles options for themes.

You can modify the following elements for Homestead themes. (For a description of colors and styles settings for specific gadgets, see Color s and styles settings by gadget.)

General formatting

General formatting settings apply throughout your website but can be superseded by more specific settings. For example, your **General formatting > Link** settings can be overridden for breadcrumbs by your **Login box > Links** settings.

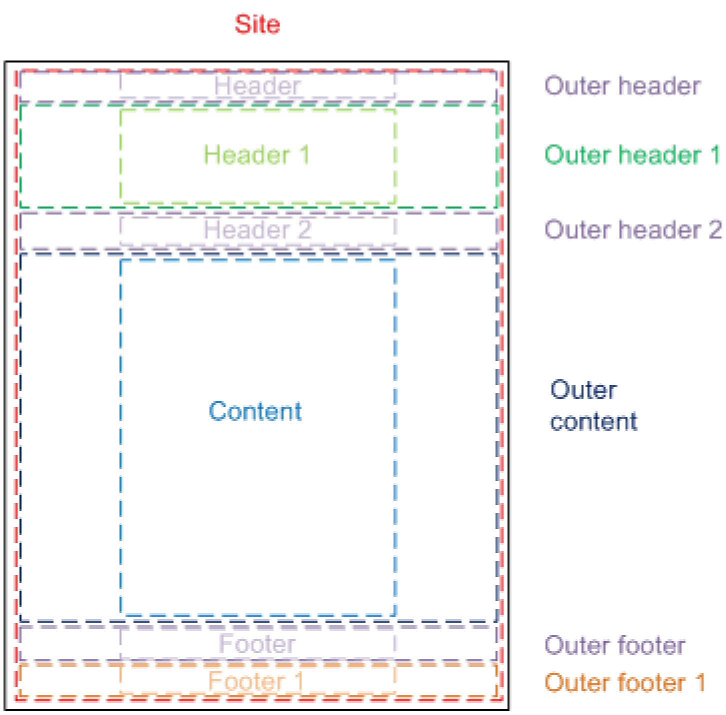
Backgrounds

For each of the elements below, you can control the following background attributes.

Attributes

Attribute	Description
Background color	The background color of the element. You can select a color from the drop-down palette or enter the hexadecimal code for the color (e.g. *#FF0000* for red).
Background image	An image to be displayed as the background the element. You can select an image by clicking the ellipsis button (...), or remove an image by clicking the X button. Using the **Background repeat** setti ng (below), you can control whether and how the image is repeated.
Background repeat	Controls whether the background is repeated horizontally or vertically, or both (tiled) or not at all.

Elements



Element	Controls...
Site	The overall background of your site. The background set here can be partially overridden by more localized background settings below.

Outer header	The background of the top portion of the header area. The background set here can be partially overridden for the center portion of the header by the **Header** setting below.
Header	The background of the center portion of the outer header.
Outer header 1	The background of the area directly below the outer header. The background set here can be partially overridden for the center portion of the area by the **Header 1** setting below.
Header 1	The background of the center portion of the area directly below the outer header.
Outer header 2	The background of the area directly below Header 1. The background set here can be partially overridden for the center portion of the area by the **Header 2** setting below.
Header 2	The background of the center portion of the area directly below Header 1.
Outer content	The background of the main content area of the page. The background set here can be partially overridden for the center portion of the area by the **Content** setting below, and for the leftmost portion using the **Outer sidebar** and **Sidebar** settings above.
Content	The background of the center portion of the main content area.
Outer footer	The background of the top footer. The background set here can be partially overridden for the center portion of the top footer by the **Fo oter** setting below.
Footer	The background of the center portion of the top footer.
Outer footer 1	The background of the second footer area. The background set here can be partially overridden for the center portion of the top footer by the **Footer 1** setting below.
Footer 1	The background of the center portion of the second footer.

Typography

Controls the appearance of text formatted using text styles.

Element	Controls...
Text	Appearance of text formatted using the **Normal** text style. Most – but not all – body text and text labels throughout your site are formatted using the Normal style. For linked text, the **Link** setting (below) will override the **Text** setting.
Link	Appearance of text links. The **Link** setting will supercede the **Text** s etting above for text links.
Link on hover	Appearance of the text links when a mouse pointer hovers over them.
Page title	Appearance of text formatted using the **Page title** text style.
Header subtitle	Appearance of text formatted using the **Header subtitle** text style.
Heading 1	Appearance of headings formatted using the **H1** style.
Heading 2	Appearance of headings formatted using the **H2** style.

Heading 3	Appearance of headings formatted using the **H3** style.
Heading 4	Appearance of headings formatted using the **H4** style.
Heading 5	Appearance of headings formatted using the **H5** style.
Heading 6	Appearance of headings formatted using the **H6** style.
Caption	Appearance of text formatted using the **Caption** style.
Caption alternative	Appearance of text formatted using the **Caption alternative** style.
Quoted	Appearance of text formatted using the **Quoted** style.
Smaller	Appearance of text formatted using the **Smaller text** style.
Event calendar title	Appearance of the **Upcoming events** and **Past events** headings on event calendars.

Form

Element	**Controls...**
Field labels	Appearance of field labels on forms such as event registration, email subscription, and membership application. If you do not specify settings here, the **General formatting > Text** settings (above) will be applied to form labels.
Option labels	Appearance of text labels for radio buttons or check boxes on forms.
Caption	Appearance of headings on member details and member profile screens.
Field instructions	Appearance of field instructions added to form fields.
Form instructions	Appearance of form instructions, such as "Select membership level", "Enter your email", "Mandatory fields", etc.
Divider	The color of the horizontal divider that separates the form instructions from the form fields.

Gadgets

For each of the available gadget styles for this theme, you can customize the following elements:

Element	**Controls...**
Background	The gadget's background color. You can select a color from the drop-down palette or enter the hexadecimal code for the color.
Title	Appearance of the gadget title. You can select a font family for the title text, and a background color or image for the title bar. You can select a color from the drop-down palette or enter the hexadecimal code for the color. If you specify a background image – by clicking the ellipsis button (...) – you can use the **Background repeat** setti ng to control whether and how the image is repeated.
Date and time	Appearance of the date and time labels within forum update gadgets and recent blog posts gadgets.
Author	Appearance of the author label within forum update gadgets and recent blog posts gadgets.

Location	Appearance of the location label within upcoming events gadgets.
Donation bar	Fill color of the donation progress bar within donation goal gadgets. You can select a color from the drop-down palette or enter the hexadecimal code for the color.
Donation bar ground	Outline color of the donation progress bar within donation goal gadgets. You can select a color from the drop-down palette or enter the hexadecimal code for the color.
Donation labels	Appearance of the **Goal** and **Collected** labels within donation goal gadgets.
Donation goal	Appearance of the **Goal** value within donation goal gadgets.
Donation collected	Appearance of the **Collected** value within donation goal gadgets.
Donation description	Appearance of the description assigned to the donation goal gadget.
Donation button	Font and background color of the **Donate** button within donation goal gadgets.
Donation button hover	Font and background color of the **Donate** button when a mouse pointer hovers over it.

Table

Controls the appearance of tables used to display database information in gadgets such as the member directory gadget. These settings do not control the appearance of forum tables, or tables you insert into content pages.

Element	**Controls...**
Column headings	Appearance of the column headings at the top of the table.
Table row	Appearance of rows within the table
Table row on hover	Background color of a row when a mouse pointer hovers over it.
Table links	Font color of text links within the table.
Table links on hover	Font color of text links within the table when a mouse pointer hovers over them.

Blog

You can control the following elements for blog and recent blog posts gadgets. Other elements can be controlled using Typography options (above).

Element	**Controls...**
Author	Controls the appearance of the author label.
Date and time	Controls the appearance of the date and time labels.
Icons	The color of the icons used within blog post gadgets on the mobile version.

Forum

You can control the following elements for discussion forum gadgets, forum update gadgets, and forum summary gadgets. Other elements can be controlled using Typography options (above).

Element	Controls...
Forum category	Controls the appearance of the forum category.
Column headings	Controls the appearance of the forum headings.
Table row	Appearance of rows within the table listing the forum topics.
Table row on hover	Background color of a row when a mouse pointer hovers over it.
Table links	Font color of text links.
Table links on hover	Font color of text links when a mouse pointer hovers over them.
Author	Controls the appearance of the author label.
Date and time	Controls the appearance of the date and time labels.
Icons	The color of the icons within discussion forum and forum summary gadgets on the mobile version.

Log in gadgets

These are the elements that appear within log in form and login in box gadgets.

Element	Controls...
Text	Appearance of the text labels that appear on the form. If you do not specify settings here, the **General formatting > Typography > Text** settings (above) will be applied to the login box text labels. ***Examples:*** the **Remember me** checkbox label, the name of the logged in member
Input fields	Appearance of the login fields used to enter the username and password.
Labels	Appearance of the labels that appear within or outside the login fields.
Links	Appearance of the text links that accompany the login fields. If you do not specify settings here, the **General formatting > Links** settings (above) will be applied to login box links. ***Example:*** the **Forgot password** link
Links on hover	Appearance of the login links when a mouse pointer hovers over them. If you do not specify settings here, the **General formatting > Links on hover** settings (above) will be applied to login box links.
Button	Appearance of the login button.

Button styles

For each of the link button styles, you can customize the following elements:

Element	Controls...
Normal	The appearance of the link button. You can specify text attributes for the button label, and a background color for the button. You can select a color from the drop-down palette or enter the hexadecimal code for the color.

Hover	The appearance of the link button when a mouse pointer hovers over it. You can specify text attributes for the button label, and a background color for the button. You can select a color from the drop-down palette or enter the hexadecimal code for the color.

Breadcrumbs

These are the elements that appear within the breadcrumbs gadget.

Element	Controls...
General	Appearance of the breadcrumbs that show your current location within a set of subpages. If you do not specify settings here, the **General formatting > Typography> Text** settings (above) will be applied to the breadcrumbs.
Link	Color of the links within the breadcrumbs. If you do not specify settings here, the **General formatting > Links** settings (above) will be applied to the breadcrumb links.
Link on hover	Color of the breadcrumb links when a mouse pointer hovers over them. If you do not specify settings here, the **General formatting > Links on hover** settings (above) will be applied to the breadcrumb links.
Current page	Color of the current page within the breadcrumbs.

Navigation links

Controls the appearance of text links within navigation links gadgets.

Element	Controls...
Link	Font color of text links within navigation links.

Menu

For each menu style, you can customize the following menu elements.

Element	Controls...
Main	Font family and background color of top-level menu items. The background color will apply to both desktop and mobile versions, but the font family will apply only to the desktop version.
Drop down	Font family and color of drop-down menu items. The background color will apply to both desktop and mobile versions, but the font family will apply only to the desktop version.

On this page:

- Navigation links
- Menu

See also:

- Customizing colors and styles
- Colors and styles settings by gadget

Color and style settings for Kaleidoscope themes

Color and style settings for Kaleidoscope themes

From the Colors and styles screen, you can change the colors and fonts of elements that appear throughout your site. To display the Colors and styles screen, click **Colors and styles** under the **Website** menu.

The Colors and styles screen lists the elements you can change along the left, and displays a preview of your changes on the right. Within the preview, you can click menu items and links to jump from page to page. Your changes won't be applied to the actual site until you click on **Save**.

Settings for different elements are grouped into categories. The categories vary depending on the website theme you have chosen.

To expand the categories and view the elements within, click the plus sign beside the category name. For each element you can define a number of characteristics. If you select the **Automatic** option, the setting will be controlled by your website theme.

Some elements on your site can be controlled by more than one setting. For example, a heading formatted using the H4 style that's also a link can be controlled using either the **General formatting > H4** setting or the **General formatting > Link** setting.

Some elements are general settings than be overridden or superseded by more specific elements. For example, the **Site** background setting under **General formatting > Backgrounds** can be overridden at the top of the page by one of the header settings, or in the middle of the page using one of the content settings.

> The settings appearing on the Color and Styles screen, and their order and default values, can be customized for a particular theme using theme overrides. For more information, see Customizing Colors and Styles options for themes.

You can modify the following elements for Kaleidoscope themes. (For a description of colors and styles settings for specific gadgets, see Colors and styles settings by gadget.)

General formatting

General formatting settings apply throughout your website but can be superseded by more specific settings. For example, your **General formatting > Link** settings can be overridden for breadcrumbs by your **Login box > Links** settings.

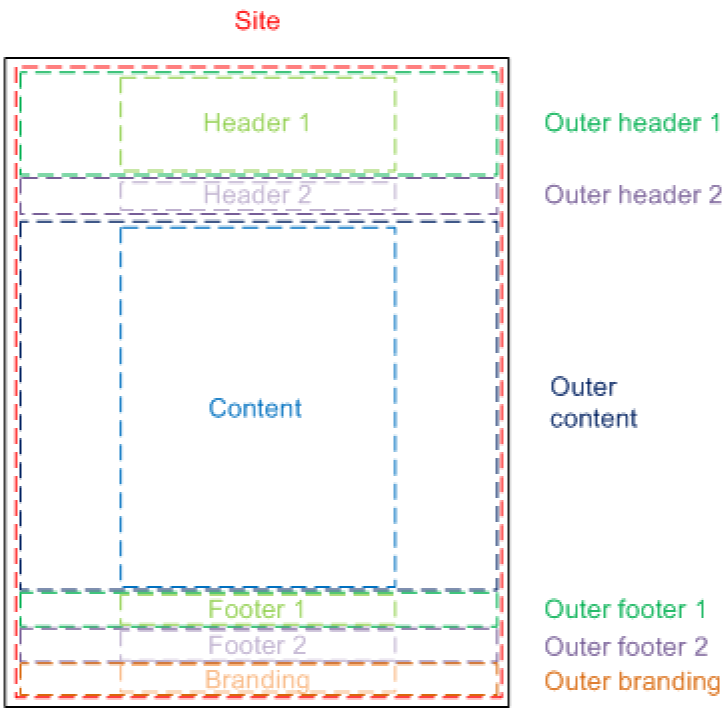
Backgrounds

For each of the elements below, you can control the following background attributes.

Attributes

Attribute	Description
Background color	The background color of the element. You can select a color from the drop-down palette or enter the hexadecimal code for the color (e.g. *#FF0000* for red).
Background image	An image to be displayed as the background the element. You can select an image by clicking the ellipsis button (...), or remove an image by clicking the X button. Using the **Background repeat** setting (below), you can control whether and how the image is repeated.
Background repeat	Controls whether the background is repeated horizontally or vertically, or both (tiled) or not at all.

Elements



Element	Controls...
Site	The overall background of your site. The background set here can be partially overridden by more localized background settings below.
Outer header 1	The background of the top portion of the header area. The background set here can be partially overridden for the center portion of the header by the **Header** setting below.
Header 1	The background of the center portion of the top outer header.
Outer header 2	The background of the area directly below Header 1. The background set here can be partially overridden for the center portion of the area by the **Header 2** setting below.
Header 2	The background of the center portion of the area directly below Header 1.
Outer content	The background of the main content area of the page. The background set here can be partially overridden for the center portion of the area by the **Content** setting below, and for the leftmost portion using the **Outer sidebar** and **Sidebar** settings above.
Content	The background of the center portion of the main content area.
Outer footer 1	The background of the top footer. The background set here can be partially overridden for the center portion of the top footer by the **Fo oter** setting below.
Footer 1	The background of the center portion of the top footer.

Outer footer 2	The background of the second footer area. The background set here can be partially overridden for the center portion of the top footer by the **Footer 1** setting below.
Footer 2	The background of the center portion of the second footer.
Outer branding	The background of the outer portion of the area where the Powered by Wild Apricot Membership Software statement appears
Branding	The background of the center portion of the area where the Powered by Wild Apricot Membership Software statement appears.

Typography

Controls the appearance of text formatted using text styles. You can set these elements differently for the gadget styles available for content gadgets: basic, for light backgrounds, and for dark backgrounds.

Element	Controls...
Text	Appearance of text formatted using the **Normal** text style. Most – but not all – body text and text labels throughout your site are formatted using the Normal style. For linked text, the **Link** setting (below) will override the **Text** setting.
Link	Appearance of text links. The **Link** setting will supersede the **Text** s etting above for text links.
Link on hover	Appearance of the text links when a mouse pointer hovers over them.
Promo	Appearance of text formatted using the **Promo** text style.
Page title	Appearance of text formatted using the **Page title** text style.
Heading 1	Appearance of headings formatted using the **H1** style.
Heading 2	Appearance of headings formatted using the **H2** style.
Heading 3	Appearance of headings formatted using the **H3** style.
Heading 4	Appearance of headings formatted using the **H4** style.
Heading 5	Appearance of headings formatted using the **H5** style.
Smaller	Appearance of text formatted using the **Smaller** style.
Caption	Appearance of text formatted using the **Caption** style.
Caption alternative	Appearance of text formatted using the **Caption alternative** style.
Quoted	Appearance of text formatted using the **Quoted** style.
Date and time	Appearance of the date and time labels within forum update gadgets and recent blog posts gadgets.
Author	Appearance of the author label within forum update gadgets and recent blog posts gadgets.
Location	Appearance of the location label within upcoming events gadgets.

Form

Element	Controls...

Field labels	Appearance of field labels on forms such as event registration, email subscription, and membership application. If you do not specify settings here, the **General formatting > Text** settings (above) will be applied to form labels.
Option labels	Appearance of text labels for radio buttons or check boxes on forms.
Caption	Appearance of headings on member details and member profile screens.
Field instructions	Appearance of field instructions added to form fields.
Form instructions	Appearance of form instructions, such as "Select membership level", "Enter your email", "Mandatory fields", etc.
Divider	The color of the horizontal divider that separates the form instructions from the form fields.

Button styles

For each of the link button styles, you can customize the following elements:

Element	**Controls...**
Normal	The appearance of the link button. You can specify text attributes for the button label, and a background color for the button. You can select a color from the drop-down palette or enter the hexadecimal code for the color.
Hover	The appearance of the link button when a mouse pointer hovers over it. You can specify text attributes for the button label, and a background color for the button. You can select a color from the drop-down palette or enter the hexadecimal code for the color.

Table

Controls the appearance of tables used to display database information in gadgets such as the member directory gadget. These settings do not control the appearance of forum tables, or tables you insert into content pages.

Element	**Controls...**
Column headings	Appearance of the column headings at the top of the table.
Table row	Appearance of rows within the table
Table row on hover	Background color of a row when a mouse pointer hovers over it.
Table links	Font color of text links within the table.
Table links on hover	Font color of text links within the table when a mouse pointer hovers over them.

Blog

You can control the following elements for blog and recent blog posts gadgets. Other elements can be controlled using Typography options (above).

Element	**Controls...**
Author	The appearance of the author label.
Date and time	The appearance of the date and time labels.

Links	The color of the **Read more**, **Add comment**, **Edit**, and **Delete** links .

Forum

You can control the following elements for discussion forum gadgets, forum update gadgets, and forum summary gadgets. Other elements can be controlled using Typography options (above).

Element	Controls...
Forum category	Controls the appearance of the forum category.
Column headings	Controls the appearance of the forum headings.
Table row	Appearance of rows within the table listing the forum topics.
Table row on hover	Background color of a row when a mouse pointer hovers over it.
Table links	Font color of text links.
Table links on hover	Font color of text links when a mouse pointer hovers over them.
Author	Controls the appearance of the author label.
Date and time	Controls the appearance of the date and time labels.
Icons	The color of the icons within discussion forum and forum summary gadgets in mobile view.

Event calendar

Element	Controls...
Title	Appearance of the **Upcoming events** and **Past events** headings on event calendars.

Donation goal

For each donation gadget style, you can customize the following elements:

Element	Controls...
Donation labels	Appearance of the **Goal** and **Collected** labels.
Donation values	Appearance of the **Goal** and **Collected** values.
Donation bar	Fill color of the collected portion of the donation progress bar. You can select a color from the drop-down palette or enter the hexadecimal code for the color.
Donation bar background	Fill color of the uncollected portion of the donation progress bar. You can select a color from the drop-down palette or enter the hexadecimal code for the color.
Donation bar border color	Outline color of the donation progress bar. You can select a color from the drop-down palette or enter the hexadecimal code for the color.
Donation bar percentage	Appearance of the donation percentage within the donation progress bar.

Donation button	Font and background color of the **Donate** button within donation goal gadgets.
Donation button hover	Font and background color of the **Donate** button when a mouse pointer hovers over it.

Featured member

For featured member gadgets, you can control the appearance of the following elements. You can set these elements differently for the gadget styles available for featured member gadgets: basic, for light backgrounds, and for dark backgrounds.

Element	Controls...
Member label	The appearance of the label of the field used to identify the member.
Member label on hover	The appearance of the label of the field used to identify the member when a mouse pointer hovers over it.
Label 2	The appearance of the label for the second field display for each member.
Label 3	The appearance of the label for the second field display for each member.
Link to member directory	The appearance of the **View member directory** link.
Link to member directory on hover	The appearance of the **View member directory** link when a mouse pointer hovers over it.

Log in gadgets

These are the elements that appear within log in form and login in box gadgets.

Element	Controls...
Text	Appearance of the text labels that appear on the form. If you do not specify settings here, the **General formatting > Typography > Text** settings (above) will be applied to the login box text labels. ***Examples:*** the **Remember me** checkbox label, the name of the logged in member
Input fields	Appearance of the login fields used to enter the username and password.
Labels	Appearance of the labels that appear within or outside the login fields.
Links	Appearance of the text links that accompany the login fields. If you do not specify settings here, the **General formatting > Links** setti ngs (above) will be applied to login box links. ***Example:*** the **Forgot password** link
Links on hover	Appearance of the login links when a mouse pointer hovers over them. If you do not specify settings here, the **General formatting > Links on hover** settings (above) will be applied to login box links.
Button	Appearance of the login button.

On this page:

- General formatting

        - Backgrounds
        - Typography
        - Form
    - Button styles
    - Table
    - Blog
    - Forum
    - Event calendar
    - Donation goal
    - Featured member
    - Log in gadgets

See also:

- Customizing colors and styles
- Colors and styles settings by gadget

Color and style settings for Showcase themes

Color and style settings for Showcase themes

From the Colors and styles screen, you can change the colors and fonts of elements that appear throughout your site. To display the Colors and styles screen, click **Colors and styles** under the **Website** menu.

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Settings for different elements are grouped into categories. The categories vary depending on the website theme you have chosen.

To expand the categories and view the elements within, click the plus sign beside the category name. For each element you can define a number of characteristics. If you select the **Automatic** option, the setting will be controlled by your website theme.

Some elements on your site can be controlled by more than one setting. For example, a heading formatted using the H4 style that's also a link can be controlled using either the **General formatting > H4** setting or the **General formatting > Link** setting.

Some elements are general settings than be overridden or superseded by more specific elements. For example, the **Site** background setting under **General formatting > Backgrounds** can be overridden at the top of the page by one of the header settings, or in the middle of the page using one of the content settings.

> The settings appearing on the Color and Styles screen, and their order and default values, can be customized for a particular theme using theme overrides. For more information, see Customizing Colors and Styles options for themes.

You can modify the following elements for Showcase themes. (For a description of colors and styles settings for specific gadgets, see Colors and styles settings by gadget.)

General formatting

General formatting settings apply throughout your website but can be superseded by more specific settings. For example, your **General formatting > Link** settings can be overridden for breadcrumbs by your **Login box > Links** settings.

Backgrounds

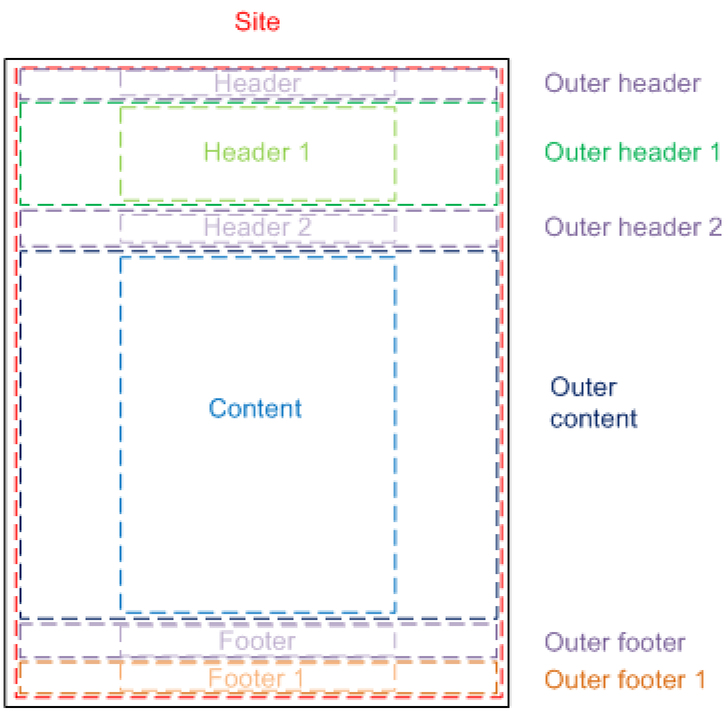
For each of the elements below, you can control the following background attributes.

Attributes

Attribute	Description
Background color	The background color of the element. You can select a color from the drop-down palette or enter the hexadecimal code for the color (e.g. *#FF0000* for red).

Background image	An image to be displayed as the background the element. You can select an image by clicking the ellipsis button (...), or remove an image by clicking the X button. Using the **Background repeat** setti ng (below), you can control whether and how the image is repeated.
Background repeat	Controls whether the background is repeated horizontally or vertically, or both (tiled) or not at all.

Elements



Element	Controls...
Site	The overall background of your site. The background set here can be partially overridden by more localized background settings below.
Outer header	The background of the top portion of the header area. The background set here can be partially overridden for the center portion of the header by the **Header** setting below.
Header	The background of the center portion of the outer header.
Outer header 1	The background of the area directly below the outer header. The background set here can be partially overridden for the center portion of the area by the **Header 1** setting below.
Header 1	The background of the center portion of the area directly below the outer header.
Outer header 2	The background of the area directly below Header 1. The background set here can be partially overridden for the center portion of the area by the **Header 2** setting below.
Header 2	The background of the center portion of the area directly below Header 1.

Outer content	The background of the main content area of the page. The background set here can be partially overridden for the center portion of the area by the **Content** setting below.
Content	The background of the center portion of the main content area.
Outer footer	The background of the top footer. The background set here can be partially overridden for the center portion of the top footer by the **Fo oter** setting below.
Footer	The background of the center portion of the top footer.
Outer footer 1	The background of the second footer area. The background set here can be partially overridden for the center portion of the top footer by the **Footer 1** setting below.
Footer 1	The background of the center portion of the second footer.

Typography

Appearance of text formatted using text styles.

Element	**Controls...**
Text	Appearance of text formatted using the **Normal** text style. Most – but not all – body text and text labels throughout your site are formatted using the Normal style. For linked text, the **Link** setting (below) will override the **Text** setting.
Link	Appearance of text links. The **Link** setting will supercede the **Text** s etting above for text links.
Link on hover	Appearance of the text links when a mouse pointer hovers over them.
Link alternative	Appearance of linked text using the **Alternative text** style.
Title	Appearance of headings formatted using the **Title** style.
Subtitle	Appearance of headings formatted using the **Subtitle** style.
Heading 1	Appearance of headings formatted using the **Heading 1** style.
Heading 1 Alternative	Appearance of headings formatted using the **Heading 1 Alternative** style.
Heading 2	Appearance of headings formatted using the **Heading 2** style.
Heading 2 Alternative	Appearance of headings formatted using the **Heading 2 Alternative** style.
Heading 3	Appearance of headings formatted using the **Heading 3** style.
Heading 4	Appearance of headings formatted using the **Heading 4** style.
Caption	Appearance of text formatted using the **Caption** style.
Caption alternative	Appearance of text formatted using the **Caption alternative** style.
Smaller	Appearance of text formatted using the **Smaller** style.
Alternative text	Appearance of text formatted using the **Alternative text** style.
Event calendar title	Appearance of the **Upcoming events** and **Past events** headings on event calendars.

Form

Element	Controls...
Field labels	Appearance of field labels on forms such as event registration, email subscription, and membership application. If you do not specify settings here, the **General formatting > Text** settings (above) will be applied to form labels.
Option labels	Appearance of text labels for radio buttons or check boxes on forms.
Caption	Appearance of headings on member details and member profile screens.
Field instructions	Appearance of field instructions added to form fields.
Form instructions	Appearance of form instructions, such as "Select membership level", "Enter your email", "Mandatory fields", etc.
Divider	The color of the horizontal divider that separates the form instructions from the form fields.

Gadget styles

For each of the available gadget styles for this theme, you can customize the following elements:

Element	Controls...
Title	Appearance of the gadget title. You can select a font family for the title text, and a background color or image for the title bar. You can select a color from the drop-down palette or enter the hexadecimal code for the color. If you specify a background image – by clicking the ellipsis button (...) – you can use the **Background repeat** setti ng to control whether and how the image is repeated.
Link	Appearance of links within gadgets.
Date and time	Appearance of the date and time labels within forum update gadgets and recent blog posts gadgets.
Author	Appearance of the author label within forum update gadgets and recent blog posts gadgets.
Location	Appearance of the location label within upcoming events gadgets.

Table

Appearance of tables used to display database information in gadgets such as the member directory gadget. These settings do not control the appearance of forum tables, or tables you insert into content pages.

Element	Controls...
Column headings	Appearance of the column headings at the top of the table.
Table row	Appearance of rows within the table
Table row on hover	Background color of a row when a mouse pointer hovers over it.
Table links	Font color of text links within the table.
Table links on hover	Font color of text links within the table when a mouse pointer hovers over them.

Blog

You can control the following elements for blog and recent blog posts gadgets. Other elements can be controlled using Typography options (above).

Element	Controls...
Author	Appearance of the author label.
Date and time	Appearance of the date and time labels.

Forum

You can control the following elements for discussion forum gadgets, forum update gadgets, and forum summary gadgets. Other elements can be controlled using Typography options (above).

Element	Controls...
Forum category	Appearance of the forum category.
Column headings	Appearance of the forum headings.
Table row	Appearance of rows within the table listing the forum topics.
Table row on hover	Background color of a row when a mouse pointer hovers over it.
Table links	Font color of text links.
Table links on hover	Font color of text links when a mouse pointer hovers over them.
Author	Appearance of the author label.
Date and time	Appearance of the date and time labels.
Date and time on hover	Appearance of the date and time labels when a mouse pointer hovers over them.
Icons	The color of the icons within discussion forum and forum summary gadgets on the mobile version.

Log in gadgets

These are the elements that appear within log in form and login in box gadgets.

Element	Controls...
Text	Appearance of the text labels that appear on the form. If you do not specify settings here, the **General formatting > Typography > Text** settings (above) will be applied to the login box text labels. ***Examples:*** the **Remember me** checkbox label, the name of the logged in member
Input fields	Appearance of the login fields used to enter the username and password.
Labels	Appearance of the labels that appear within or outside the login fields.
Links	Appearance of the text links that accompany the login fields. If you do not specify settings here, the **General formatting > Links** setti ngs (above) will be applied to login box links. ***Example:*** the **Forgot password** link

Links on hover	Appearance of the login links when a mouse pointer hovers over them. If you do not specify settings here, the **General formatting > Links on hover** settings (above) will be applied to login box links.
Button	Appearance of the text and background of the login button.
Button on hover	Appearance of the text and background of the login button when you hover over it.
Button on active	Appearance of the text and background of the login button when you click it.

Button styles

For each of the link button styles, you can customize the following elements:

Element	Controls...
Normal	The appearance of the link button. You can specify text attributes for the button label, and a background color for the button. You can select a color from the drop-down palette or enter the hexadecimal code for the color.
Hover	The appearance of the link button when a mouse pointer hovers over it. You can specify text attributes for the button label, and a background color for the button. You can select a color from the drop-down palette or enter the hexadecimal code for the color.
Active	The appearance of the link button when you click it.

Donation goal

For each donation goal gadget style, you can customize the following elements:

Element	Controls...
Donation bar	Fill color of the donation progress bar within donation goal gadgets. You can select a color from the drop-down palette or enter the hexadecimal code for the color.
Donation bar ground	Outline color of the donation progress bar within donation goal gadgets. You can select a color from the drop-down palette or enter the hexadecimal code for the color.
Donation labels	Appearance of the **Goal** and **Collected** labels within donation goal gadgets.
Donation goal	Appearance of the **Goal** value within donation goal gadgets.
Donation collected	Appearance of the **Collected** value within donation goal gadgets.
Donation description	Appearance of the description assigned to the donation goal gadget.
Donation button	Font and background color of the **Donate** button within donation goal gadgets.
Donation button hover	Font and background color of the **Donate** button when you hover over it.
Donation button active	Font and background color of the **Donate** button when you click it.

Social profile

For each social profile gadget style, you can customize the following settings:

Setting	Description
Background color	The background color of the gadget. You can select a color from the drop-down palette or enter the hexadecimal code for the color (e.g. *#FF0000* for red).
Font family	The typeface used to display the text. This setting only appears for gadget styles that display text rather than icons for social networks.
Font color	The color of the text.
Font size	The size of the text. You can specify the font size in pixels, points, or ems.
Font weight	Whether the text is bold or not.
Font style	Whether the text is italicized or not.

Breadcrumbs

These are the elements that appear within the breadcrumbs gadget.

Element	Controls...
General	Appearance of the breadcrumbs that show your current location within a set of subpages. If you do not specify settings here, the **General formatting > Typography> Text** settings (above) will be applied to the breadcrumbs.
Link	Color of the links within the breadcrumbs. If you do not specify settings here, the **General formatting > Links** settings (above) will be applied to the breadcrumb links.
Link on hover	Color of the breadcrumb links when a mouse pointer hovers over them. If you do not specify settings here, the **General formatting > Links on hover** settings (above) will be applied to the breadcrumb links.
Current page	Color of the current page within the breadcrumbs.

Site map

For each sitemap gadget style, you can customize the following elements:

Element	Controls...
General	The font and font style used to display menu items.
Link	The color of the menu items.

Navigation links

Appearance of text links within navigation links gadgets.

Element	Controls...
Link	Font color of text links within navigation links.
Link on hover	Font color of navigation links when you hover over them.

Horizontal menu

For each horizontal menu gadget style, you can customize some of the following menu elements.

Element	Controls...
Normal	Font family and background color of menu items.
Hover	Font family and background color of menu items when you hover over them.
Selected	Font family and background color of menu items when you click them.
Mobile menu	Font color and background color of the menu on mobile devices.

Vertical menu

For each vertical menu gadget style, you can customize some of the following menu elements.

Element	Controls...
Normal	Font family and background color of menu items.
Hover	Font family and background color of menu items when you hover over them.
Selected	Font family and background color of menu items when you click them.

Secondary menu

For each secondary menu gadget style, you can customize the following elements:

Element	Controls...
General	Font family and background color of menu items.
Hover	Font family and background color of menu items when you hover over them.

WA branding

Controls the appearance of the Powered by Wild Apricot area at the bottom of your site pages.

Element	Controls...
Backgrounds	The background color or background image for the inner and outer sections of the Powered by Wild Apricot area.
Text	The appearance of the text within the Powered by Wild Apricot area.
Link	The appearance of the link within the Powered by Wild Apricot area.

On this page:

- Log in gadgets
- Button styles
- Donation goal
- Social profile
- Breadcrumbs
- Site map
- Navigation links
- Horizontal menu
- Vertical menu
- Secondary menu
- WA branding

See also:

- Customizing colors and styles
- Colors and styles settings by gadget

Color and style settings for Skyline themes

Color and style settings for Skyline themes

From the Colors and styles screen, you can change the colors and fonts of elements that appear throughout your site. To display the Colors and styles screen, click **Colors and styles** under the **Website** menu.

The Colors and styles screen lists the elements you can change along the left, and displays a preview of your changes on the right. Within the preview, you can click menu items and links to jump from page to page. Your changes won't be applied to the actual site until you click on **Sa ve**.

Settings for different elements are grouped into categories. The categories vary depending on the website theme you have chosen.

To expand the categories and view the elements within, click the plus sign beside the category name. For each element you can define a number of characteristics. If you select the **Automatic** option, the setting will be controlled by your website theme.

Some elements on your site can be controlled by more than one setting. For example, a heading formatted using the H4 style that's also a link can be controlled using either the **General formatting > H4** setting or the **General formatting > Link** setting.

Some elements are general settings than be overridden or superseded by more specific elements. For example, the **Site** background setting under **General formatting > Backgrounds** can be overridden at the top of the page by one of the header settings, or in the middle of the page using one of the content settings.

> The settings appearing on the Color and Styles screen, and their order and default values, can be customized for a particular theme using theme overrides. For more information, see Customizing Colors and Styles options for themes.

You can modify the following elements for Skyline themes. (For a description of colors and styles settings for specific gadgets, see Colors and styles settings by gadget.)

General formatting

General formatting settings apply throughout your website but can be superseded by more specific settings. For example, your **General formatting > Link** settings can be overridden for breadcrumbs by your **Login box > Links** settings.

Backgrounds

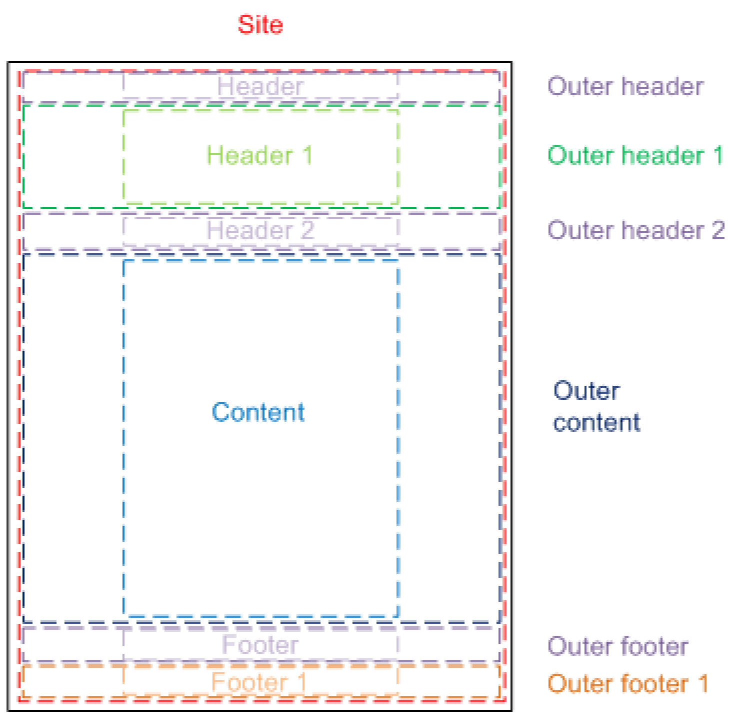
For each of the elements below, you can control the following background attributes.

Attributes

Attribute	Description

Background color	The background color of the element. You can select a color from the drop-down palette or enter the hexadecimal code for the color (e.g. *#FF0000* for red).
Background image	An image to be displayed as the background the element. You can select an image by clicking the ellipsis button (...), or remove an image by clicking the X button. Using the **Background repeat** setti ng (below), you can control whether and how the image is repeated.
Background repeat	Controls whether the background is repeated horizontally or vertically, or both (tiled) or not at all.

Elements



Element	Controls...
Site	The overall background of your site. The background set here can be partially overridden by more localized background settings below.
Outer header	The background of the top portion of the header area. The background set here can be partially overridden for the center portion of the header by the **Header** setting below.
Header	The background of the center portion of the outer header.
Outer header 1	The background of the area directly below the outer header. The background set here can be partially overridden for the center portion of the area by the **Header 1** setting below.
Header 1	The background of the center portion of the area directly below the outer header.

Outer header 2	The background of the area directly below Header 1. The background set here can be partially overridden for the center portion of the area by the **Header 2** setting below.
Header 2	The background of the center portion of the area directly below Header 1.
Outer content	The background of the main content area of the page. The background set here can be partially overridden for the center portion of the area by the **Content** setting below.
Content	The background of the center portion of the main content area.
Outer footer	The background of the top footer. The background set here can be partially overridden for the center portion of the top footer by the **Fo oter** setting below.
Footer	The background of the center portion of the top footer.
Outer footer 1	The background of the second footer area. The background set here can be partially overridden for the center portion of the top footer by the **Footer 1** setting below.
Footer 1	The background of the center portion of the second footer.

Typography

Controls the appearance of text formatted using text styles.

Element	Controls...
Text	Appearance of text formatted using the **Normal** text style. Most – but not all – body text and text labels throughout your site are formatted using the Normal style. For linked text, the **Link** setting (below) will override the **Text** setting.
Narrow	Appearance of text formatted using the **Narrow** text style.
Wide	Appearance of text formatted using the **Wide** text style.
Link	Appearance of text links. The **Link** setting will supercede the **Text** s etting above for text links.
Link on hover	Appearance of the text links when a mouse pointer hovers over them.
Promo	Appearance of text formatted using the **Promo** text style.
Page title	Appearance of text formatted using the **Page title** text style.
Heading 1	Appearance of headings formatted using the **H1** style.
Heading 2	Appearance of headings formatted using the **H2** style.
Heading 3	Appearance of headings formatted using the **H3** style.
Heading 4	Appearance of headings formatted using the **H4** style.
Caption	Appearance of text formatted using the **Caption** style.
Caption alternative	Appearance of text formatted using the **Caption alternative** style.
Smaller	Appearance of text formatted using the **Smaller text** style.
Event calendar title	Appearance of the **Upcoming events** and **Past events** headings on event calendars.

Form

Element	Controls...
Field labels	Appearance of field labels on forms such as event registration, email subscription, and membership application. If you do not specify settings here, the **General formatting > Text** settings (above) will be applied to form labels.
Option labels	Appearance of text labels for radio buttons or check boxes on forms.
Caption	Appearance of headings on member details and member profile screens.
Field instructions	Appearance of field instructions added to form fields.
Form instructions	Appearance of form instructions, such as "Select membership level", "Enter your email", "Mandatory fields", etc.
Divider	The color of the horizontal divider that separates the form instructions from the form fields.

Gadgets

For each of the available gadget styles for this theme, you can customize the following elements:

Element	Controls...
Background	The gadget's background color. You can select a color from the drop-down palette or enter the hexadecimal code for the color.
Title	Appearance of the gadget title. You can select a font family for the title text, and a background color or image for the title bar. You can select a color from the drop-down palette or enter the hexadecimal code for the color. If you specify a background image – by clicking the ellipsis button (...) – you can use the **Background repeat** setting to control whether and how the image is repeated.
Date and time	Appearance of the date and time labels within forum update gadgets and recent blog posts gadgets.
Author	Appearance of the author label within forum update gadgets and recent blog posts gadgets.
Location	Appearance of the location label within upcoming events gadgets.
Donation bar	Fill color of the donation progress bar within donation goal gadgets. You can select a color from the drop-down palette or enter the hexadecimal code for the color.
Donation bar ground	Outline color of the donation progress bar within donation goal gadgets. You can select a color from the drop-down palette or enter the hexadecimal code for the color.
Donation labels	Appearance of the **Goal** and **Collected** labels within donation goal gadgets.
Donation goal	Appearance of the **Goal** value within donation goal gadgets.
Donation collected	Appearance of the **Collected** value within donation goal gadgets.
Donation description	Appearance of the description assigned to the donation goal gadget.

Donation button	Font and background color of the **Donate** button within donation goal gadgets.
Donation button hover	Font and background color of the **Donate** button when a mouse pointer hovers over it.

Table

Controls the appearance of tables used to display database information in gadgets such as the member directory gadget. These settings do not control the appearance of forum tables, or tables you insert into content pages.

Element	Controls...
Column headings	Appearance of the column headings at the top of the table.
Table row	Appearance of rows within the table
Table row on hover	Background color of a row when a mouse pointer hovers over it.
Table links	Font color of text links within the table.
Table links on hover	Font color of text links within the table when a mouse pointer hovers over them.

Blog

You can control the following elements for blog and recent blog posts gadgets. Other elements can be controlled using Typography options (above).

Element	Controls...
Author	Controls the appearance of the author label.
Date and time	Controls the appearance of the date and time labels.
Icons	The color of the icons used within blog post gadgets on the mobile version.

Forum

You can control the following elements for discussion forum gadgets, forum update gadgets, and forum summary gadgets. Other elements can be controlled using Typography options (above).

Element	Controls...
Forum category	Controls the appearance of the forum category.
Column headings	Controls the appearance of the forum headings.
Table row	Appearance of rows within the table listing the forum topics.
Table row on hover	Background color of a row when a mouse pointer hovers over it.
Table links	Font color of text links.
Table links on hover	Font color of text links when a mouse pointer hovers over them.
Author	Controls the appearance of the author label.
Date and time	Controls the appearance of the date and time labels.
Icons	The color of the icons within discussion forum and forum summary gadgets on the mobile version.

Log in gadgets

These are the elements that appear within log in form and login in box gadgets.

Element	Controls...
Text	Appearance of the text labels that appear on the form. If you do not specify settings here, the **General formatting > Typography > Text** settings (above) will be applied to the login box text labels. ***Examples:*** the **Remember me** checkbox label, the name of the logged in member
Input fields	Appearance of the login fields used to enter the username and password.
Labels	Appearance of the labels that appear within or outside the login fields.
Links	Appearance of the text links that accompany the login fields. If you do not specify settings here, the **General formatting > Links** setti ngs (above) will be applied to login box links. ***Example:*** the **Forgot password** link
Links on hover	Appearance of the login links when a mouse pointer hovers over them. If you do not specify settings here, the **General formatting > Links on hover** settings (above) will be applied to login box links.
Button	Appearance of the login button.

Button styles

For each of the link button styles, you can customize the following elements:

Element	Controls...
Normal	The appearance of the link button. You can specify text attributes for the button label, and a background color for the button. You can select a color from the drop-down palette or enter the hexadecimal code for the color.
Hover	The appearance of the link button when a mouse pointer hovers over it. You can specify text attributes for the button label, and a background color for the button. You can select a color from the drop-down palette or enter the hexadecimal code for the color.

Breadcrumbs

These are the elements that appear within the breadcrumbs gadget.

Element	Controls...
General	Appearance of the breadcrumbs that show your current location within a set of subpages. If you do not specify settings here, the **Ge neral formatting > Typography> Text** settings (above) will be applied to the breadcrumbs.
Link	Color of the links within the breadcrumbs. If you do not specify settings here, the **General formatting > Links** settings (above) will be applied to the breadcrumb links.

Link on hover	Color of the breadcrumb links when a mouse pointer hovers over them. If you do not specify settings here, the **General formatting > Links on hover** settings (above) will be applied to the breadcrumb links.
Current page	Color of the current page within the breadcrumbs.

Navigation links

Controls the appearance of text links within navigation links gadgets.

Element	Controls...
Link	Font color of text links within navigation links.
Link on hover	Font color of navigation links when a mouse pointer hovers over them.

Menu

For each menu style, you can customize the following menu elements.

Element	Controls...
Main	Font family and background color of top-level menu items. The background color will apply to both desktop and mobile versions, but the font family will apply only to the desktop version.
Drop down	Font family and color of drop-down menu items. The background color will apply to both desktop and mobile versions, but the font family will apply only to the desktop version.

On this page:

See also:

- Customizing colors and styles
- Colors and styles settings by gadget

Color and style settings for Terra and Firma themes

Color and style settings for Terra and Firma themes

From the Colors and styles screen, you can change the colors and fonts of elements that appear throughout your site. To display the Colors and styles screen, click **Colors and styles** under the **Website** menu.

The Colors and styles screen lists the elements you can change along the left, and displays a preview of your changes on the right. Within the preview, you can click menu items and links to jump from page to page. Your changes won't be applied to the actual site until you click on **Sa**

ve.

Settings for different elements are grouped into categories. The categories vary depending on the website theme you have chosen.

To expand the categories and view the elements within, click the plus sign beside the category name. For each element you can define a number of characteristics. If you select the **Automatic** option, the setting will be controlled by your website theme.

Some elements on your site can be controlled by more than one setting. For example, a heading formatted using the H4 style that's also a link can be controlled using either the **General formatting > H4** setting or the **General formatting > Link** setting.

Some elements are general settings than be overridden or superseded by more specific elements. For example, the **Site** background setting under **General formatting > Backgrounds** can be overridden at the top of the page by one of the header settings, or in the middle of the page using one of the content settings.

> The settings appearing on the Color and Styles screen, and their order and default values, can be customized for a particular theme using theme overrides. For more information, see Customizing Colors and Styles options for themes.

You can modify the following elements for Terra and Firma themes. (For a description of colors and styles settings for specific gadgets, see Colors and styles settings by gadget.)

General formatting

General formatting settings apply throughout your website but can be superseded by more specific settings. For example, your **General formatting > Link** settings can be overridden for breadcrumbs by your **Login box > Links** settings.

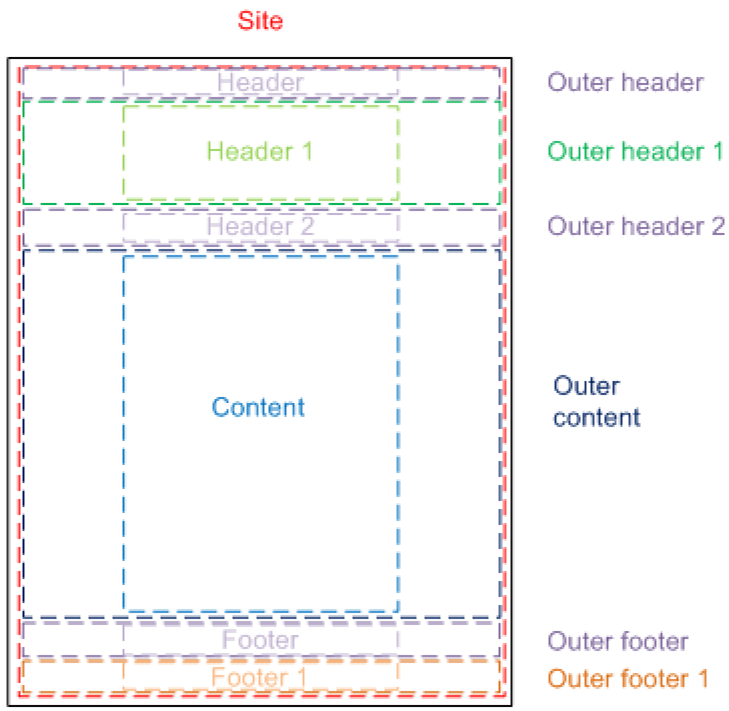
Backgrounds

For each of the elements below, you can control the following background attributes.

Attributes

Attribute	Description
Background color	The background color of the element. You can select a color from the drop-down palette or enter the hexadecimal code for the color (e.g. *#FF0000* for red).
Background image	An image to be displayed as the background the element. You can select an image by clicking the ellipsis button (...), or remove an image by clicking the X button. Using the **Background repeat** setti ng (below), you can control whether and how the image is repeated.
Background repeat	Controls whether the background is repeated horizontally or vertically, or both (tiled) or not at all.

Elements



Element	Controls...
Site	The overall background of your site. The background set here can be partially overridden by more localized background settings below.
Outer header	The background of the top portion of the header area. The background set here can be partially overridden for the center portion of the header by the **Header** setting below.
Header	The background of the center portion of the outer header.
Outer header 1	The background of the area directly below the outer header. The background set here can be partially overridden for the center portion of the area by the **Header 1** setting below.
Header 1	The background of the center portion of the area directly below the outer header.
Outer header 2	The background of the area directly below Header 1. The background set here can be partially overridden for the center portion of the area by the **Header 2** setting below.
Header 2	The background of the center portion of the area directly below Header 1.
Outer content	The background of the main content area of the page. The background set here can be partially overridden for the center portion of the area by the **Content** setting below, and for the leftmost portion using the **Outer sidebar** and **Sidebar** settings above.
Content	The background of the center portion of the main content area.
Outer footer	The background of the top footer. The background set here can be partially overridden for the center portion of the top footer by the **Fo oter** setting below.

Footer	The background of the center portion of the top footer.
Outer footer 1	The background of the second footer area. The background set here can be partially overridden for the center portion of the top footer by the **Footer 1** setting below.
Footer 1	The background of the center portion of the second footer.

Typography

Controls the appearance of text formatted using text styles.

Element	Controls...
Text	Appearance of text formatted using the **Normal** text style. Most – but not all – body text and text labels throughout your site are formatted using the Normal style. For linked text, the **Link** setting (below) will override the **Text** setting.
Alternative text	Appearance of text formatted using the **Alternative text** style.
Link	Appearance of text links. The **Link** setting will supercede the **Text** s etting above for text links.
Link on hover	Appearance of the text links when a mouse pointer hovers over them.
Link alternative	Appearance of text links using the **LinkAlternative text** style.
Link auxiliary	Appearance of text links using the **LinkAuxiliary** style.
Promo	Appearance of text formatted using the **Promo** text style.
Page title	Appearance of text formatted using the **Page title** text style.
Heading 1	Appearance of headings formatted using the **H1** style.
Heading 2	Appearance of headings formatted using the **H2** style.
Heading 3	Appearance of headings formatted using the **H3** style.
Heading 4	Appearance of headings formatted using the **H4** style.
Caption	Appearance of text formatted using the **Caption** style.
Quoted	Appearance of text formatted using the **Quoted** style.

Form

Element	Controls...
Field labels	Appearance of field labels on forms such as event registration, email subscription, and membership application. If you do not specify settings here, the **General formatting > Text** settings (above) will be applied to form labels.
Option labels	Appearance of text labels for radio buttons or check boxes on forms.
Caption	Appearance of headings on member details and member profile screens.
Field instructions	Appearance of field instructions added to form fields.

Form instructions	Appearance of form instructions, such as "Select membership level", "Enter your email", "Mandatory fields", etc.
Divider	The color of the horizontal divider that separates the form instructions from the form fields.

Gadgets

For each of the available gadget styles for this theme, you can customize the following elements:

Element	Controls...
Title	Appearance of the gadget title. You can select a font family for the title text, and a background color or image for the title bar. You can select a color from the drop-down palette or enter the hexadecimal code for the color. If you specify a background image – by clicking the ellipsis button (...) – you can use the **Background repeat** setting to control whether and how the image is repeated.
Link	Appearance of links within forum update gadgets and recent blog posts gadgets.
Date and time	Appearance of the date and time labels within forum update gadgets and recent blog posts gadgets.
Author	Appearance of the author label within forum update gadgets and recent blog posts gadgets.
Location	Appearance of the location label within upcoming events gadgets.

Donation goal

For each donation gadget style, you can customize the following elements:

Element	Controls...
Title	Appearance of the gadget title. You can select a font family for the title text, and a background color or image for the title bar. You can select a color from the drop-down palette or enter the hexadecimal code for the color. If you specify a background image – by clicking the ellipsis button (...) – you can use the **Background repeat** setting to control whether and how the image is repeated.
Donation description	Appearance of the description assigned to the donation goal gadget.
Donation bar	Fill color of the collected portion of the donation progress bar. You can select a color from the drop-down palette or enter the hexadecimal code for the color.
Donation bar background	Fill color of the uncollected portion of the donation progress bar. You can select a color from the drop-down palette or enter the hexadecimal code for the color.
Donation bar border color	Outline color of the donation progress bar. You can select a color from the drop-down palette or enter the hexadecimal code for the color.
Donation bar percentage	Appearance of the donation percentage within the donation progress bar.
Donation labels	Appearance of the **Goal** and **Collected** labels (and values).

Donation button	Font and background color of the **Donate** button within donation goal gadgets.
Donation button hover	Font and background color of the **Donate** button when a mouse pointer hovers over it.

Table

Controls the appearance of tables used to display database information in gadgets such as the member directory gadget. These settings do not control the appearance of forum tables, or tables you insert into content pages.

Element	Controls...
Column headings	Appearance of the column headings at the top of the table.
Table row	Appearance of rows within the table
Table row on hover	Background color of a row when a mouse pointer hovers over it.
Table links	Font color of text links within the table.
Table links on hover	Font color of text links within the table when a mouse pointer hovers over them.

Blog

You can control the following elements for blog and recent blog posts gadgets. Other elements can be controlled using Typography options (above).

Element	Controls...
Author	The appearance of the author label.
Date and time	The appearance of the date and time labels.
Links	The color of the **Read more**, **Add comment**, **Edit**, and **Delete** links .
Icons	The color of the icons used within blog post gadgets on the mobile version.

Forum

You can control the following elements for discussion forum gadgets, forum update gadgets, and forum summary gadgets. Other elements can be controlled using Typography options (above).

Element	Controls...
Forum category	Controls the appearance of the forum category.
Column headings	Controls the appearance of the forum headings.
Table row	Appearance of rows within the table listing the forum topics.
Table row on hover	Background color of a row when a mouse pointer hovers over it.
Table links	Font color of text links.
Table links on hover	Font color of text links when a mouse pointer hovers over them.
Author	Controls the appearance of the author label.
Date and time	Controls the appearance of the date and time labels.

Icons	The color of the icons within discussion forum and forum summary gadgets in mobile view.

Log in gadgets

These are the elements that appear within log in form and login in box gadgets.

Element	Controls...
Text	Appearance of the text labels that appear on the form. If you do not specify settings here, the **General formatting > Typography > Text** settings (above) will be applied to the login box text labels. ***Examples:*** the **Remember me** checkbox label, the name of the logged in member
Input fields	Appearance of the login fields used to enter the username and password.
Labels	Appearance of the labels that appear within or outside the login fields.
Links	Appearance of the text links that accompany the login fields. If you do not specify settings here, the **General formatting > Links** setti ngs (above) will be applied to login box links. ***Example:*** the **Forgot password** link
Links on hover	Appearance of the login links when a mouse pointer hovers over them. If you do not specify settings here, the **General formatting > Links on hover** settings (above) will be applied to login box links.
Button	Appearance of the login button.

Button styles

For each of the link button styles, you can customize the following elements:

Element	Controls...
Normal	The appearance of the link button. You can specify text attributes for the button label, and a background color for the button. You can select a color from the drop-down palette or enter the hexadecimal code for the color.
Hover	The appearance of the link button when a mouse pointer hovers over it. You can specify text attributes for the button label, and a background color for the button. You can select a color from the drop-down palette or enter the hexadecimal code for the color.

Navigation gadgets

Breadcrumbs

Controls the appearance of elements within the breadcrumbs gadget.

Element	Controls...

General	Appearance of the breadcrumbs that show your current location within a set of subpages. If you do not specify settings here, the **General formatting > Typography> Text** settings (above) will be applied to the breadcrumbs.
Link	Color of the links within the breadcrumbs. If you do not specify settings here, the **General formatting > Links** settings (above) will be applied to the breadcrumb links.
Link on hover	Color of the breadcrumb links when a mouse pointer hovers over them. If you do not specify settings here, the **General formatting > Links on hover** settings (above) will be applied to the breadcrumb links.
Current page	Color of the current page within the breadcrumbs.

Navigation links

Controls the appearance of text links within navigation links gadgets.

Element	Controls...
Link	Font color of text links within navigation links.
Link on hover	Font color of links when a mouse pointer hovers over them.

Horizontal menu

For each menu style, and for both normal and wide state, you can customize the following menu elements.

Element	Controls...
Main	Font family and background color of top-level menu items. The background color will apply to both desktop and mobile versions, but the font family will apply only to the desktop version.
Drop down	Font family and color of drop-down menu items. The background color will apply to both desktop and mobile versions, but the font family will apply only to the desktop version.

Vertical menu

For each menu style, you can customize the following menu elements.

Element	Controls...
Main	Font family and background color of top-level menu items. The background color will apply to both desktop and mobile versions, but the font family will apply only to the desktop version.
Drop down	Font family and color of drop-down menu items. The background color will apply to both desktop and mobile versions, but the font family will apply only to the desktop version.

Secondary menu

For each secondary menu gadget style, you can customize the following elements:

Element	Controls...
General	The font and font style used to display menu items.
Link	The color of the menu items.

Sitemap

For each sitemap gadget style, you can customize the following elements:

Element	Controls...
General	The font and font style used to display menu items.
Link	The color of the menu items.

WA branding

Controls the appearance of the Powered by Wild Apricot statement at the bottom of your site pages.

Element	Controls...
Text	The overall appearance of the branding statement.
Link	The appearance of the link within the branding statement.

On this page:

See also:

- Customizing colors and styles
- Colors and styles settings by gadget

Color and style settings for Tinted Tiles and Building Blocks themes

Color and style settings for Tinted Tiles and Building Blocks themes

From the Colors and styles screen, you can change the colors and fonts of elements that appear throughout your site. To display the Colors and styles screen, click **Colors and styles** under the **Website** menu.

The Colors and styles screen lists the elements you can change along the left, and displays a preview of your changes on the right. Within the preview, you can click menu items and links to jump from page to page. Your changes won't be applied to the actual site until you click on **Sa ve**.

Settings for different elements are grouped into categories. The categories vary depending on the website theme you have chosen.

To expand the categories and view the elements within, click the plus sign beside the category name. For each element you can define a number of characteristics. If you select the **Automatic** option, the setting will be controlled by your website theme.

Some elements on your site can be controlled by more than one setting. For example, a heading formatted using the H4 style that's also a link can be controlled using either the **General formatting > H4** setting or the **General formatting > Link** setting.

Some elements are general settings than be overridden or superseded by more specific elements. For example, the **Site** background setting under **General formatting > Backgrounds** can be overridden at the top of the page by one of the header settings, or in the middle of the page using one of the content settings.

> The settings appearing on the Color and Styles screen, and their order and default values, can be customized for a particular theme using theme overrides. For more information, see Customizing Colors and Styles options for themes.

You can modify the following elements for Tinted Tiles and Building Blocks themes. (For a description of colors and styles settings for specific gadgets, see Colors and styles settings by gadget.)

General formatting

General formatting settings apply throughout your website but can be superseded by more specific settings. For example, your **General formatting > Link** settings can be overridden for breadcrumbs by your **Login box > Links** settings.

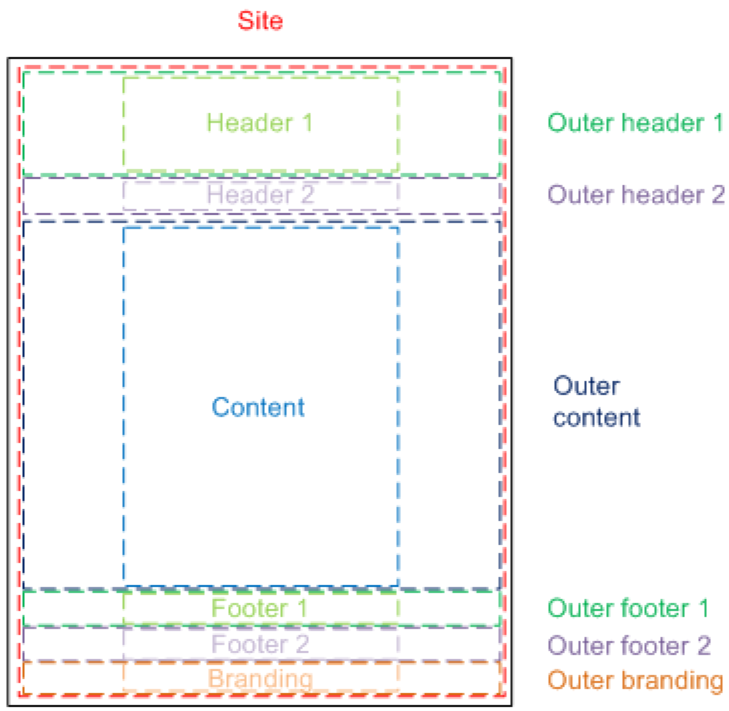
Backgrounds

For each of the elements below, you can control the following background attributes.

Attributes

Attribute	Description
Background color	The background color of the element. You can select a color from the drop-down palette or enter the hexadecimal code for the color (e.g. *#FF0000* for red).
Background image	An image to be displayed as the background the element. You can select an image by clicking the ellipsis button (...), or remove an image by clicking the X button. Using the **Background repeat** setti ng (below), you can control whether and how the image is repeated.
Background repeat	Controls whether the background is repeated horizontally or vertically, or both (tiled) or not at all.

Elements



Element	Controls...
Site	The overall background of your site. The background set here can be partially overridden by more localized background settings below.
Outer header 1	The background of the top portion of the header area. The background set here can be partially overridden for the center portion of the header by the **Header** setting below.
Header 1	The background of the center portion of the top outer header.
Outer header 2	The background of the area directly below Header 1. The background set here can be partially overridden for the center portion of the area by the **Header 2** setting below.
Header 2	The background of the center portion of the area directly below Header 1.
Outer content	The background of the main content area of the page. The background set here can be partially overridden for the center portion of the area by the **Content** setting below, and for the leftmost portion using the **Outer sidebar** and **Sidebar** settings above.
Content	The background of the center portion of the main content area.
Outer footer 1	The background of the top footer. The background set here can be partially overridden for the center portion of the top footer by the **Fo oter** setting below.
Footer 1	The background of the center portion of the top footer.
Outer footer 2	The background of the second footer area. The background set here can be partially overridden for the center portion of the top footer by the **Footer 1** setting below.

Footer 2	The background of the center portion of the second footer.
Outer branding	The background of the outer portion of the area where the Powered by Wild Apricot Membership Software statement appears
Branding	The background of the center portion of the area where the Powered by Wild Apricot Membership Software statement appears.

Typography

Controls the appearance of text formatted using text styles. You can set these elements differently for the gadget styles available for content gadgets: basic, for light backgrounds, and for dark backgrounds.

Element	**Controls...**
Text	Appearance of text formatted using the **Normal** text style. Most – but not all – body text and text labels throughout your site are formatted using the Normal style. For linked text, the **Link** setting (below) will override the **Text** setting.
Link	Appearance of text links. The **Link** setting will supersede the **Text** s etting above for text links.
Link on hover	Appearance of the text links when a mouse pointer hovers over them.
Gadget title	Appearance of the gadget title.
Promo	Appearance of text formatted using the **Promo** text style.
Page title	Appearance of text formatted using the **Page title** text style.
Heading 1	Appearance of headings formatted using the **H1** style.
Heading 2	Appearance of headings formatted using the **H2** style.
Heading 3	Appearance of headings formatted using the **H3** style.
Heading 4	Appearance of headings formatted using the **H4** style.
Heading 5	Appearance of headings formatted using the **H5** style.
Smaller	Appearance of text formatted using the **Smaller** style.
Caption	Appearance of text formatted using the **Caption** style.
Caption alternative	Appearance of text formatted using the **Caption alternative** style.
Quoted	Appearance of text formatted using the **Quoted** style.
Date and time	Appearance of the date and time labels within forum update gadgets and recent blog posts gadgets.
Author	Appearance of the author label within forum update gadgets and recent blog posts gadgets.
Location	Appearance of the location label within upcoming events gadgets.

Form

Element	**Controls...**

Field labels	Appearance of field labels on forms such as event registration, email subscription, and membership application. If you do not specify settings here, the **General formatting > Text** settings (above) will be applied to form labels.
Option labels	Appearance of text labels for radio buttons or check boxes on forms.
Caption	Appearance of headings on member details and member profile screens.
Field instructions	Appearance of field instructions added to form fields.
Form instructions	Appearance of form instructions, such as "Select membership level", "Enter your email", "Mandatory fields", etc.
Divider	The color of the horizontal divider that separates the form instructions from the form fields.

Button styles

For each of the link button styles, you can customize the following elements:

Element	**Controls...**
Normal	The appearance of the link button. You can specify text attributes for the button label, and a background color for the button. You can select a color from the drop-down palette or enter the hexadecimal code for the color.
Hover	The appearance of the link button when a mouse pointer hovers over it. You can specify text attributes for the button label, and a background color for the button. You can select a color from the drop-down palette or enter the hexadecimal code for the color.

Table

Controls the appearance of tables used to display database information in gadgets such as the member directory gadget. These settings do not control the appearance of forum tables, or tables you insert into content pages.

Element	**Controls...**
Column headings	Appearance of the column headings at the top of the table.
Table row	Appearance of rows within the table
Table row on hover	Background color of a row when a mouse pointer hovers over it.
Table links	Font color of text links within the table.
Table links on hover	Font color of text links within the table when a mouse pointer hovers over them.

Blog

You can control the following elements for blog and recent blog posts gadgets. Other elements can be controlled using Typography options (above).

Element	**Controls...**
Author	The appearance of the author label.
Date and time	The appearance of the date and time labels.

Links	The color of the **Read more**, **Add comment**, **Edit**, and **Delete** links .

Forum

You can control the following elements for discussion forum gadgets, forum update gadgets, and forum summary gadgets. Other elements can be controlled using Typography options (above).

Element	Controls...
Forum category	Controls the appearance of the forum category.
Column headings	Controls the appearance of the forum headings.
Table row	Appearance of rows within the table listing the forum topics.
Table row on hover	Background color of a row when a mouse pointer hovers over it.
Table links	Font color of text links.
Table links on hover	Font color of text links when a mouse pointer hovers over them.
Author	Controls the appearance of the author label.
Date and time	Controls the appearance of the date and time labels.
Icons	The color of the icons within discussion forum and forum summary gadgets in mobile view.

Event calendar

Element	Controls...
Title	Appearance of the **Upcoming events** and **Past events** headings on event calendars.

Donation goal

For each donation gadget style, you can customize the following elements:

Element	Controls...
Title	Appearance of the gadget title. You can select a font family for the title text, and a background color or image for the title bar. You can select a color from the drop-down palette or enter the hexadecimal code for the color. If you specify a background image – by clicking the ellipsis button (...) – you can use the **Background repeat** setti ng to control whether and how the image is repeated.
Donation labels	Appearance of the **Goal** and **Collected** labels.
Donation values	Appearance of the **Goal** and **Collected** values.
Donation description	Appearance of the description assigned to the donation goal gadget.
Donation bar	Fill color of the collected portion of the donation progress bar. You can select a color from the drop-down palette or enter the hexadecimal code for the color.

Donation bar background	Fill color of the uncollected portion of the donation progress bar. You can select a color from the drop-down palette or enter the hexadecimal code for the color.
Donation bar border color	Outline color of the donation progress bar. You can select a color from the drop-down palette or enter the hexadecimal code for the color.
Donation bar percentage	Appearance of the donation percentage within the donation progress bar.
Donation button	Font and background color of the **Donate** button within donation goal gadgets.
Donation button hover	Font and background color of the **Donate** button when a mouse pointer hovers over it.

Featured member

For featured member gadgets, you can control the appearance of the following elements. You can set these elements differently for the gadget styles available for featured member gadgets: basic, for light backgrounds, and for dark backgrounds.

Element	Controls...
Member label	The appearance of the label of the field used to identify the member.
Member label on hover	The appearance of the label of the field used to identify the member when a mouse pointer hovers over it.
Label 2	The appearance of the label for the second field display for each member.
Label 3	The appearance of the label for the second field display for each member.
Link to member directory	The appearance of the **View member directory** link.
Link to member directory on hover	The appearance of the **View member directory** link when a mouse pointer hovers over it.

Log in gadgets

These are the elements that appear within log in form and login in box gadgets.

Element	Controls...
Text	Appearance of the text labels that appear on the form. If you do not specify settings here, the **General formatting > Typography > Text** settings (above) will be applied to the login box text labels. ***Examples:*** the **Remember me** checkbox label, the name of the logged in member
Input fields	Appearance of the login fields used to enter the username and password.
Labels	Appearance of the labels that appear within or outside the login fields.

Links	Appearance of the text links that accompany the login fields. If you do not specify settings here, the **General formatting > Links** settings (above) will be applied to login box links. ***Example:*** the **Forgot password** link
Links on hover	Appearance of the login links when a mouse pointer hovers over them. If you do not specify settings here, the **General formatting > Links on hover** settings (above) will be applied to login box links.
Button	Appearance of the login button.

On this page:

See also:

- Customizing colors and styles
- Colors and styles settings by gadget

Color and style settings for Treehouse themes

Color and style settings for Treehouse themes

From the Colors and styles screen, you can change the colors and fonts of elements that appear throughout your site. To display the Colors and styles screen, click **Colors and styles** under the **Website** menu.

The Colors and styles screen lists the elements you can change along the left, and displays a preview of your changes on the right. Within the preview, you can click menu items and links to jump from page to page. Your changes won't be applied to the actual site until you click on **Save**.

Settings for different elements are grouped into categories. The categories vary depending on the website theme you have chosen.

To expand the categories and view the elements within, click the plus sign beside the category name. For each element you can define a number of characteristics. If you select the **Automatic** option, the setting will be controlled by your website theme.

Some elements on your site can be controlled by more than one setting. For example, a heading formatted using the H4 style that's also a link can be controlled using either the **General formatting > H4** setting or the **General formatting > Link** setting.

Some elements are general settings than be overridden or superseded by more specific elements. For example, the **Site** background setting under **General formatting > Backgrounds** can be overridden at the top of the page by one of the header settings, or in the middle of the page using one of the content settings.

> The settings appearing on the Color and Styles screen, and their order and default values, can be customized for a particular theme using theme overrides. For more information, see Customizing Colors and Styles options for themes.

You can modify the following elements for the Treehouse themes. (For a description of colors and styles settings for specific gadgets, see Colors and styles settings by gadget.)

General formatting

General formatting settings apply throughout your website but can be superseded by more specific settings. For example, your **General**

formatting > Link settings can be overridden for breadcrumbs by your **Login box > Links** settings.

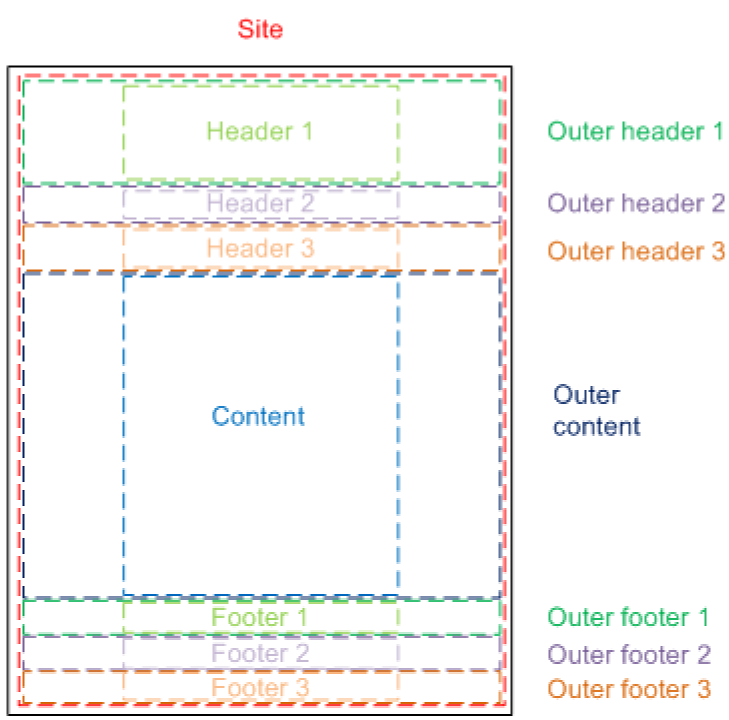
Backgrounds

For each of the elements below, you can control the following background attributes.

Attributes

Attribute	**Description**
Background color	The background color of the element. You can select a color from the drop-down palette or enter the hexadecimal code for the color (e.g. *#FF0000* for red).
Background image	An image to be displayed as the background the element. You can select an image by clicking the ellipsis button (...), or remove an image by clicking the X button. Using the **Background repeat** setti ng (below), you can control whether and how the image is repeated.
Background repeat	Controls whether the background is repeated horizontally or vertically, or both (tiled) or not at all.

Elements



Element	**Controls...**
Site	The overall background of your site. The background set here can be partially overridden by more localized background settings below.
Outer header 1	The background of the header area at the top. The background set here can be partially overridden for the center portion of the top header by the **Header 1** setting below.
Header 1	The background of the center portion of the header area at the top.

Outer header 2	The background of the area directly below the header area at the top. The background set here can be partially overridden for the center portion of the area by the **Header 2** setting below.
Header 2	The background of the center portion of the area directly below the header area at the top.
Outer header 3	The background of the area directly below Header 2. The background set here can be partially overridden for the center portion of the area by the **Header 3** setting below.
Header 3	The background of the center portion of the area directly below Header 2.
Outer content	The background of the main content area of the page. The background set here can be partially overridden for the center portion of the area by the **Content** setting below.
Content	The background of the center portion of the main content area.
Outer footer	The background of the top footer. The background set here can be partially overridden for the center portion of the top footer by the **Fo oter 1** setting below.
Footer 1	The background of the center portion of the top footer.
Outer footer 2	The background of the second footer area. The background set here can be partially overridden for the center portion of the top footer by the **Footer 2** setting below.
Footer 2	The background of the center portion of the second footer.
Outer footer 3	The background of the third footer area. The background set here can be partially overridden for the center portion of the top footer by the **Footer 3** setting below.
Footer 3	The background of the center portion of the third footer.

Typography

Controls the appearance of text formatted using text styles.

Element	**Controls...**
Text	Appearance of text formatted using the **Normal** text style. Most – but not all – body text and text labels throughout your site are formatted using the Normal style. For linked text, the **Link** setting (below) will override the **Text** setting.
Wide	Appearance of text formatted using the **Wide** text style.
Narrow	Appearance of text formatted using the **Narrow** text style.
Link	Appearance of text links. The **Link** setting will supercede the **Text** s etting above for text links.
Link on hover	Appearance of the text links when a mouse pointer hovers over them.
Page title	Appearance of text formatted using the **Page title** text style.
Heading 1	Appearance of headings formatted using the **H1** style.
Heading 2	Appearance of headings formatted using the **H2** style.

Heading 3	Appearance of headings formatted using the **H3** style.
Heading 4	Appearance of headings formatted using the **H4** style.
Quoted	Appearance of text formatted using the **Quoted text** style.
Text highlighted	Appearance of text formatted using the **Text highlighted** style.
Event calendar title	Appearance of the **Upcoming events** and **Past events** headings on event calendars.

Form

Element	Controls...
Field labels	Appearance of field labels on forms such as event registration, email subscription, and membership application. If you do not specify settings here, the **General formatting > Text** settings (above) will be applied to form labels.
Option labels	Appearance of text labels for radio buttons or check boxes on forms.
Caption	Appearance of headings on member details and member profile screens.
Field instructions	Appearance of field instructions added to form fields.
Form instructions	Appearance of form instructions, such as "Select membership level", "Enter your email", "Mandatory fields", etc.
Divider	The color of the horizontal divider that separates the form instructions from the form fields.

Table

Controls the appearance of tables used to display database information in gadgets such as the member directory gadget. These settings do not control the appearance of forum tables, or tables you insert into content pages.

Element	Controls...
Column headings	Appearance of the column headings at the top of the table.
Table row	Appearance of rows within the table
Table row on hover	Background color of a row when a mouse pointer hovers over it.
Table links	Font color of text links within the table.
Table links on hover	Font color of text links within the table when a mouse pointer hovers over them.

Blog

You can control the following elements for blog and recent blog posts gadgets. Other elements can be controlled using Typography options (above).

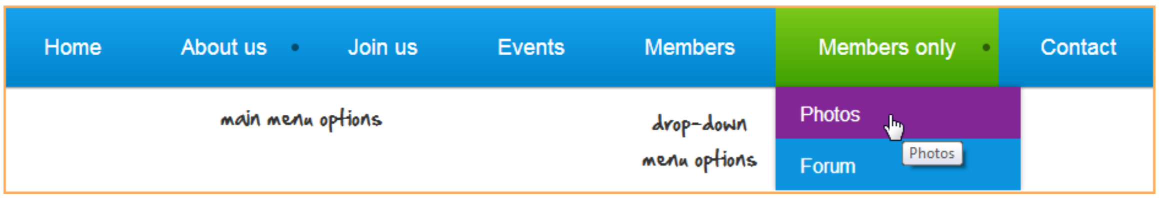
Element	Controls...
Author	Controls the appearance of the author label.
Date and time	Controls the appearance of the date and time labels.

Forum

You can control the following elements for discussion forum gadgets and forum update gadgets. Other elements can be controlled using Typography options (above).

Element	Controls...
Forum category	Controls the appearance of the forum category in the forum summary.
Column headings	Controls the appearance of the forum headings in the forum summary.
Table row	Appearance of rows within the forum summary.
Table row on hover	Background color of a row when a mouse pointer hovers over it.
Table links	Font color of text links within the forum summary.
Table links on hover	Font color of text links within the forum summary when a mouse pointer hovers over them.
Author	Controls the appearance of the author label.
Date and time	Controls the appearance of the date and time labels.

Menu



Element	Controls...
Main	Font family and size of top-level menu items.
Drop down	Font family and size of drop-down menu items

Log in gadgets

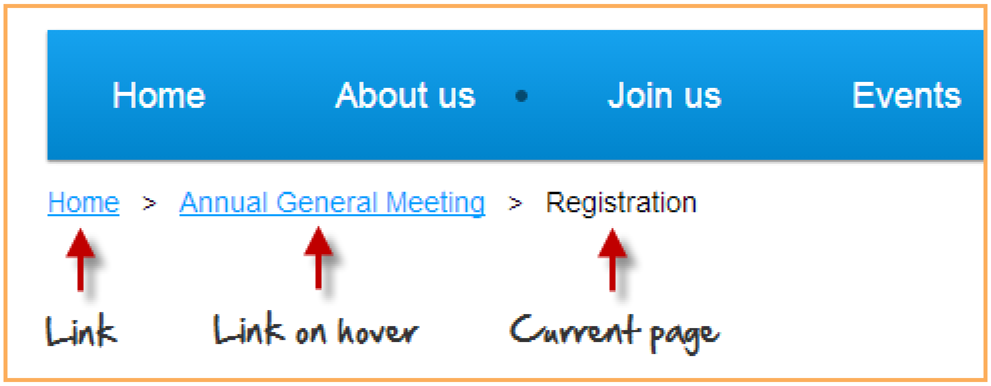
These are the elements that appear within log in form and login in box gadgets.

Element	Controls...
Text	Appearance of the text labels that appear on the form. If you do not specify settings here, the **General formatting > Typography > Text** settings (above) will be applied to the login box text labels. ***Examples:*** the **Remember me** checkbox label, the name of the logged in member
Input fields	Appearance of the login fields used to enter the username and password.
Labels	Appearance of the labels that appear within or outside the login fields.
Links	Appearance of the text links that accompany the login fields. If you do not specify settings here, the **General formatting > Links** setti ngs (above) will be applied to login box links. ***Example:*** the **Forgot password** link

Links on hover	Appearance of the login links when a mouse pointer hovers over them. If you do not specify settings here, the **General formatting > Links on hover** settings (above) will be applied to login box links.

Breadcrumbs

These are the elements that appear within the breadcrumbs gadget.



Element	Controls...
General	Appearance of the breadcrumbs that show your current location within a set of subpages. If you do not specify settings here, the **Ge neral formatting > Typography> Text** settings (above) will be applied to the breadcrumbs.
Link	Color of the links within the breadcrumbs. If you do not specify settings here, the **General formatting > Links** settings (above) will be applied to the breadcrumb links.
Link on hover	Color of the breadcrumb links when a mouse pointer hovers over them. If you do not specify settings here, the **General formatting > Links on hover** settings (above) will be applied to the breadcrumb links.
Current page	Color of the current page within the breadcrumbs.

Navigation links

Controls the appearance of text links within navigation links gadgets.

Element	Controls...
Link	Font color of text links within navigation links.
Link on hover	Font color of navigation links when a mouse pointer hovers over them.

On this page:

- Navigation links

See also:

- Customizing colors and styles
- Colors and styles settings by gadget

Color and style settings for Granite themes

Color and style settings for Granite themes

From the Colors and styles screen, you can change the colors and fonts of elements that appear throughout your site. Settings for different elements are grouped into categories. The categories vary depending on the website theme you have chosen.

Some elements on your site can be controlled by more than one setting. For example, a heading formatted using the H4 style that's also a link can be controlled using either the **General formatting > H4** setting or the **General formatting > Link** setting.

Some elements are general settings than be overridden or superseded by more specific elements. For example, the **General formatting > Link** setting can be overridden for breadcrumbs by the **Breadcrumbs > Link** setting.

You can modify the following elements for Granite themes.

Site

Element	Controls...
Content	Background color of your site.

General formatting

Typography

Element	Controls...
Text	Appearance of most – but not all – body text and text labels throughout your site. For linked text, the **Link** setting (below) will override the **Text** setting.
Link	Appearance of text links. The **Link** setting will supercede the **Text** s etting above for text links.
Link on hover	Appearance of the text links when a mouse pointer hovers over them.
H1	Appearance of headings formatted using the H1 style. These headings appear in HTML code within <h1> tags and can be applied using the **Text style** drop-down when editing a content gadget.
H1 Alternative	Appearance of headings formatted using the H1 Alternative style. These headings appear in HTML code within <h1 class="contStyleExcHeadingColored"> tags.
H2	Appearance of headings formatted using the H2 style. These headings appear in HTML code within <h1> tags.
H2 Alternative	Appearance of headings formatted using the H2 Alternative style. These headings appear in HTML code within <h2 class="contStyleExcHeadingColored"> tags.

H3	Appearance of headings formatted using the H3 style. Examples include: • Section titles on event calendar gadgets • **Select membership level** heading on membership application gadgets • **Subscription form** heading on subscription form gadgets • **Donations** heading on donation gadgets • Captcha **Security check** heading
H3 Alternative	Appearance of headings formatted using the H3 Alternative style. These headings appear in HTML code within <h3 class="contStyleExcHeadingColored"> tags.
H4	Appearance of headings formatted using the H4 style. Examples include: • Gadget titles • Blog post titles • Forum headings • Forum summary headings • Event names within event calendar • **Registration** heading within event details
H4 Alternative	Appearance of headings formatted using the H4 Alternative style. These headings appear in HTML code within <h4 class="contStyleExcHeadingColored"> tags.
Text alt color 1	Appearance of text formatted using the Alt color 1 style. The text will appear in the HTML code within <span class="contStyleExcInlineColored1"> tags.
Text alt color 2	Appearance of text formatted using the Alt color 2 style. The text will appear in the HTML code within <span class="contStyleExcInlineColored2"> tags.
Text alt highlighted	Appearance of text formatted using the Alt highlighted style. The text will appear in the HTML code within <span class="contStyleExcInlineHighlighted"> tags.
Page title	Appearance of text formatted using the Page title style. The text will appear in the HTML code within <span class="pageTitle"> tags.
Quoted	Appearance of text formatted using the Quoted style. The text will appear in the HTML code within <span class="quotedText"> tags.

Form

Element	Controls...
Labels	Appearance of field labels on forms such as event registration, email subscription, and membership application. If you do not specify settings here, the **General formatting > Text** settings (above) will be applied to form labels.
Option title	Appearance of text labels for radio buttons or check boxes, as well as level names and descriptions on membership application forms.
Caption	Appearance of headings on member details and member profile screens.
Disabled items	Appearance of disabled items within the form.

Field explanation	Appearance of field instructions added to form fields, as well as level descriptions on membership application forms.

Table

Controls the appearance of tables used to display database information in gadgets such as the member directory gadget. These settings do not control the appearance of tables you insert into content pages.

Element	Controls...
Header	Appearance of the column headings at the top of the table.
Table row	Appearance of rows within the table
Table row on hover	Background color of a row when a mouse pointer hovers over it.
Table links	Font color of text links within the table.
Table links on hover	Font color of text links within the table when a mouse pointer hovers over them.

Info box

Appearance of the areas used by gadgets to list information.

Examples: upcoming events, event details, forum topics and messages

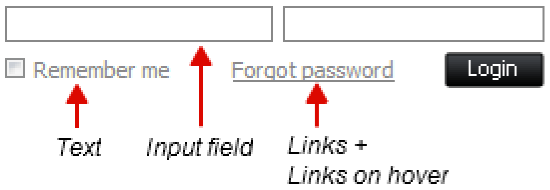
Element	Controls...
Links	Font color of text links within the info box.
Links on hover	Font color of text links within the info box when a mouse pointer hovers over them.
Header	Appearance of headings at the top of each info box.
Header on hover	Font color of text links with the info box heading when a mouse pointer hovers over them.

Menu

Element	Controls...
Item	Appearance of menu items, both active and inactive. You can separately control the font color and background color of active menu items using the **Active item** setting below.
Item on hover	Font color and background color of inactive menu items when the mouse pointer hovers over them.
Active item	Font color and background color of active menu items.

Login box

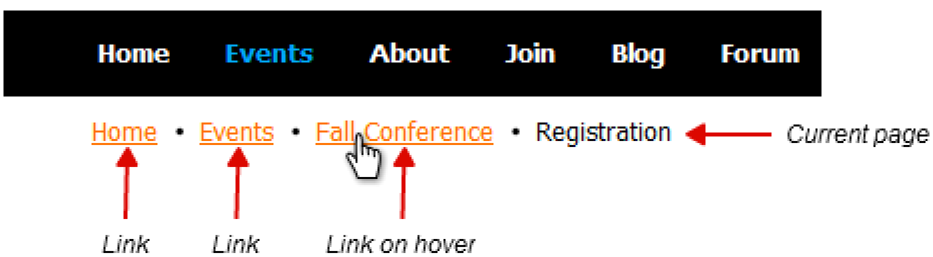
These are the elements that appear within a log in form gadget.



Element	Controls...
Input fields	Appearance of the login fields used to enter the username and password.
Text	Appearance of the text labels that accompany the login fields. If you do not specify settings here, the **General formatting > Text** settings (above) will be applied to the login box text labels. ***Examples:*** the **Remember me** checkbox label, the name of the logged in member
Links	Appearance of the text links that accompany the login fields. If you do not specify settings here, the **General formatting > Link** settings (above) will be applied to login box links. ***Example:*** the **Forgot password** link
Links on hover	Appearance of the login links when a mouse pointer hovers over them. If you do not specify settings here, the **General formatting > Link on hover** settings (above) will be applied to login box links.

Breadcrumbs

These are the elements that appear within the breadcrumbs gadget.



Element	Controls...
General	Appearance of the breadcrumbs that show your current location within a set of subpages. If you do not specify settings here, the **General formatting > Text** settings (above) will be applied to the breadcrumbs.
Link	Color of the links within the breadcrumbs. If you do not specify settings here, the **General formatting > Link** settings (above) will be applied to the breadcrumb links.
Link on hover	Color of the breadcrumb links when a mouse pointer hovers over them. If you do not specify settings here, the **General formatting > Link on hover** settings (above) will be applied to the breadcrumb links.
Current page	Color of the current page within the breadcrumbs.

ⓘ The settings appearing on the Color and Styles screen, and their order and default values, can be customized for a particular theme using theme overrides. For more information, see Customizing Colors and Styles options for themes.

On this page:

See also:

- Customizing colors and styles
- Colors and styles settings by gadget

Color and style settings for Aurora, Glass, Keynote, Memo, Nature, and Notebook themes

Color and style settings for Aurora, Glass, Keynote, Memo, Nature, and Notebook themes

These themes are no longer supported by Wild Apricot's content management systems (CMS) and will no longer appear as options within the theme gallery

From the Colors and styles screen , you can change the colors and fonts of elements that appear throughout your site. Settings for different elements are grouped into categories. The categories vary depending on the website theme you have chosen.

Some elements on your site can be controlled by more than one setting. For example, a heading formatted using the H4 style that's also a link can be controlled using either the **General formatting > H4** setting or the **General formatting > Link** setting.

Some elements are general settings than be overridden or superseded by more specific elements. For example, the **General formatting > Link** setting can be overridden for login boxes by the **Login box > Link** setting.

The settings appearing on the Color and Styles screen, and their order and default values, can be customized for a particular theme using theme overrides. For more information, see Customizing Colors and Styles options for themes.

You can modify the following elements for Aurora, Glass, Keynote, Memo, Nature, and Notebook themes.

Site

Your site's background.

Attribute	Description
Background color	The background color of your site. You can select a color from the drop-down palette or enter the hexadecimal code for the color (e.g. *#FF0000* for red).
Background image	An image to be displayed as the background for your site. You can select an image by clicking the ellipsis button (...), or remove an image by clicking the X button. Using the **Background repeat** setti ng (below), you can control whether and how the image is repeated.
Background repeat	Controls whether the background is repeated horizontally or vertically, or both (tiled) or not at all.

Content	The background color of the content area of your site. You can select a color from the drop-down palette or enter the hexadecimal code for the color (e.g. *#FF0000* for red).

General formatting

Typography

Element	Controls...
Text	Appearance of most – but not all – body text and text labels throughout your site. For linked text, the **Link** setting (below) will override the **Text** setting.
Link	Appearance of text links. The **Link** setting will supercede the **Text** s etting above for text links.
Link on hover	Appearance of the text links and menu items when a mouse pointer hovers over them.
H1	Appearance of headings formatted using the H1 style. These headings appear in HTML code within <h1> tags and can be applied using the **Text style** drop-down when editing a content gadget.
H1 Alternative	Appearance of headings formatted using the H1 Alternative style. These headings appear in HTML code within <h1 class="contStyleExcHeadingColored"> tags.
H2	Appearance of headings formatted using the H2 style. These headings appear in HTML code within <h1> tags.
H2 Alternative	Appearance of headings formatted using the H2 Alternative style. These headings appear in HTML code within <h2 class="contStyleExcHeadingColored"> tags.
H3	Appearance of headings formatted using the H3 style.
H3 Alternative	Appearance of headings formatted using the H3 Alternative style. These headings appear in HTML code within <h3 class="contStyleExcHeadingColored"> tags.
H4	Appearance of headings formatted using the H4 style.
H4 Alternative	Appearance of headings formatted using the H4 Alternative style. These headings appear in HTML code within <h4 class="contStyleExcHeadingColored"> tags.
Text alt color 1	Appearance of text formatted using the Alt color 1 style. The text will appear in the HTML code within <span class="contStyleExcInlineColored1"> tags.
Text alt color 2	Appearance of text formatted using the Alt color 2 style. The text will appear in the HTML code within <span class="contStyleExcInlineColored2"> tags.
Text alt highlighted	Appearance of text formatted using the Alt highlighted style. The text will appear in the HTML code within <span class="contStyleExcInlineHighlighted"> tags.
Page title	Appearance of text formatted using the Page title style. The text will appear in the HTML code within <span class="pageTitle"> tags.

Quoted	Appearance of text formatted using the Quoted style. The text will appear in the HTML code within <span class="quotedText"> tags.
Section title	Appearance of text formatted using the Section title style. The text will appear in the HTML code within <span class="sectionTitle"> tags. ***Examples:*** **Upcoming events** heading on event calendar
Label	Appearance of labels. If you do not specify settings here, the Text settings (above) will be applied.
Disabled items	Appearance of disabled items. ***Example:*** member only pricing for non-members

Box

Element	**Controls...**
Background color	Background color of boxes appearing on certain gadgets (e.g. blog gadgets).
Header	Appearance of the header area at the top of the box.
Header link	Appearance of links within the header area at the top of the box.
Header link on hover	Appearance of links within the header area at the top of the box when a mouse pointer hovers over them.
Label	Appearance of labels within the box.
Text	Appearance of text within the box.
Link	Appearance of links within the box.
Link on hover	Appearance of links within the box when a mouse pointer hovers over them.
Footer	Background color of the area at the bottom of the box.
Footer link on hover	Appearance of links at the bottom the box.

Outline box

Element	**Controls...**
Outline color	Outline color of boxes used in certain gadgets.
Background color	Background color of the box.
Header	Appearance of the header area at the top of the box.
Header link	Appearance of links within the header area at the top of the box.
Header link on hover	Appearance of links within the header area at the top of the box when a mouse pointer hovers over them.
Label	Appearance of labels within the box.
Label alternative	Appearance of other labels within the box.
Text	Appearance of text within the box.
Link	Appearance of links within the box.

Link on hover	Appearance of links within the box when a mouse pointer hovers over them.
Footer	Background color of the area at the bottom of the box.
Footer link on hover	Appearance of links at the bottom the box.

Colored box

Element	**Controls...**
Background color	Background color of colored boxes used in certain gadgets (e.g. event details).
Info box	Background color of event detail area within the box.
Label	Appearance of labels within the box.
Label alternative	Appearance of other labels within the box.
Text	Appearance of text within the box.
Link	Appearance of links within the box.
Link on hover	Appearance of links within the box when a mouse pointer hovers over them.
Disabled items	Appearance of disabled items within the box. ***Example:*** member only pricing for non-members

List

Element	**Controls...**
Background color	Background color of table used in certain gadget to list items.
Header	Appearance of the header area at the top of the table.
Header link	Appearance of links within the table.
Header link on hover	Appearance of links within the table when a mouse pointer hovers over them.
Row	Background color of rows within the table
Highlighted row	Background color of highlighted row within the table
Text	Appearance of text within the table.
Link	Appearance of links within the table.
Link on hover	Appearance of links within the table when a mouse pointer hovers over them.
Disabled items	Appearance of disabled items within the table.

Form

Element	**Controls...**
Background color	Background color of forms such as event registration, email subscription, and membership application.
Title	Appearance of headings within the forms.

Section title	Appearance of section titles within the forms.
Label	Appearance of labels within the forms. If you do not specify settings here, the Text settings (below) will be applied.
Mandatory label	Appearance of mandatory field labels within the forms. Your settings here will be added to the Label settings.
Field explanation	Appearance of field instructions added to form fields.
Mandatory asterisk	Appearance of the asterisk that precedes the phrase *Mandatory fields* on forms.
Text	Appearance of text within the forms. If you specify both Text and Label settings (above), the Label settings will take precedence.
Link	Appearance of links within the forms.
Link on hover	Appearance of links within the forms when a mouse pointer hovers over them.
Disabled items	Appearance of disabled items within the forms.

Menu (static)

Element	**Controls...**
Level 1 - Normal	Appearance of top level static menu items, other than the currently active item.
Level 1 - Hover	Appearance of top level static menu items when a mouse pointer hovers over them.
Level 1 - Current	Appearance of the currently active top level menu item.
Level 2 - Normal	Appearance of second level static menu items, other than the currently active item.
Level 2 - Hover	Appearance of second level static menu items when a mouse pointer hovers over them.
Level 2 - Current	Appearance of the currently active second level menu item.
Level 3 - Normal	Appearance of third level static menu items, other than the currently active item.
Level 3 - Hover	Appearance of third level static menu items when a mouse pointer hovers over them.
Level 3 - Current	Appearance of the currently active second level menu item.

Menu (dynamic)

Element	**Controls...**
Level 2 - Normal	Appearance of second level dynamic menu items.
Level 2 - Hover	Appearance of second level dynamic menu items when a mouse pointer hovers over them.

Login box

Element	**Controls...**

Labels when logged in	Appearance of text labels within the login area when a user is logged in. Does not affect text links.
Links	Appearance of the text links within the login area. If you do not specify settings here, any changes to the **General formatting > Link** settings (above) will be applied to login box links. ***Example:*** the **Forgot password** link
Links when logged in	Appearance of the text links within the login area when a user is logged in.
Links on hover	Appearance of the login links when a mouse pointer hovers over them. If you do not specify settings here, any changes to the **General formatting > Link on hover** settings (above) will be applied to login box links.
Links on hover when logged in	Appearance of the login links when a mouse pointer hovers over them and a user is logged in.
"Remember me" label	Appearance of the **Remember me** checkbox label.

See also

- Color and style settings for Treehouse themes
- Color and style settings for Clean Lines, White Space, Dark Impact themes
- Color and style settings for Business Casual themes
- Color and style settings for Granite themes

On this page:

See also:

- Customizing colors and styles
- Colors and styles settings by gadget

Color and style settings for Fiesta themes (deprecated)

Color and style settings for Fiesta themes (deprecated)

The non-responsive version of the Fiesta theme set has been deprecated – it has been superseded by a newer responsive version. For information on the responsive version, see Fiesta theme set.

From the Colors and styles screen, you can change the colors and fonts of elements that appear throughout your site. Settings for different elements are grouped into categories. The categories vary depending on the website theme you have chosen.

Some elements on your site can be controlled by more than one setting. For example, a heading formatted using the H4 style that's also a link can be controlled using either the **General formatting > H4** setting or the **General formatting > Link** setting.

Some elements are general settings than be overridden or superseded by more specific elements. For example, the **Site** background setting under **General formatting > Backgrounds** can be overridden at the top of the page by one of the header settings, or in the middle of the page using one of the content settings.

> The settings appearing on the Color and Styles screen, and their order and default values, can be customized for a particular theme using theme overrides. For more information, see Customizing Colors and Styles options for themes.

You can modify the following elements for Fiesta themes.

General formatting

General formatting settings apply throughout your website but can be superseded by more specific settings. For example, your **General formatting > Link** settings can be overridden for breadcrumbs by your **Login box > Links** settings.

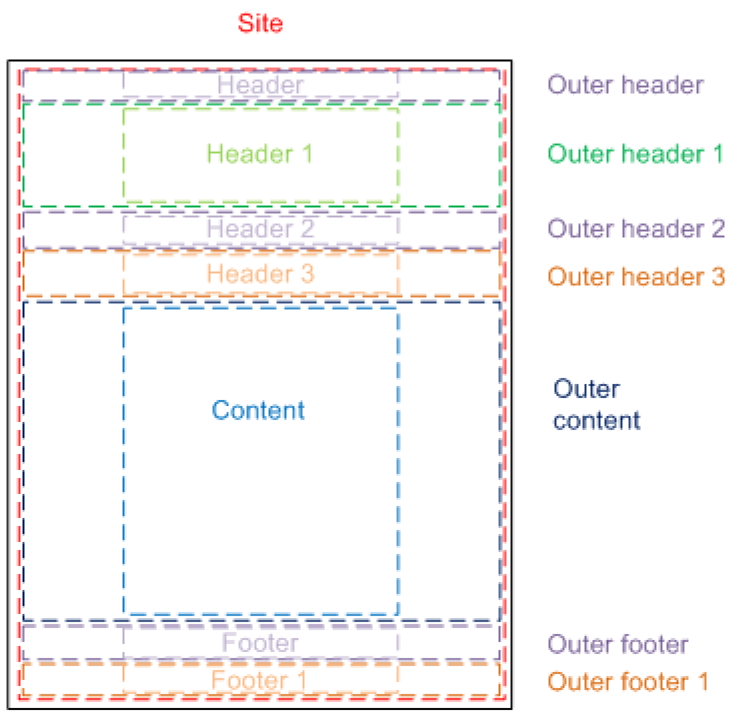
Backgrounds

For each of the elements below, you can control the following background attributes.

Attributes

Attribute	Description
Background color	The background color of the element. You can select a color from the drop-down palette or enter the hexadecimal code for the color (e.g. *#FF0000* for red).
Background image	An image to be displayed as the background the element. You can select an image by clicking the ellipsis button (...), or remove an image by clicking the X button. Using the **Background repeat** setti ng (below), you can control whether and how the image is repeated.
Background repeat	Controls whether the background is repeated horizontally or vertically, or both (tiled) or not at all.

Elements



Element	Controls...
Site	The overall background of your site. The background set here can be partially overridden by more localized background settings below.
Outer header	The background of the top portion of the header area. The background set here can be partially overridden for the center portion of the header by the **Header** setting below.
Header	The background of the center portion of the outer header.
Outer header 1	The background of the area directly below the outer header. The background set here can be partially overridden for the center portion of the area by the **Header 1** setting below.
Header 1	The background of the center portion of the area directly below the outer header.
Outer header 2	The background of the area directly below Header 1. The background set here can be partially overridden for the center portion of the area by the **Header 2** setting below.
Header 2	The background of the center portion of the area directly below Header 1. This is the sticky placeholder that creates a non-scrolling area, suitable for sticky menus.
Outer header 3	The background of the area directly below Header 2. The background set here can be partially overridden for the center portion of the area by the **Header 3** setting below.
Header 3	The background of the center portion of the area directly below Header 2.
Outer content	The background of the main content area of the page. The background set here can be partially overridden for the center portion of the area by the **Content** setting below.
Content	The background of the center portion of the main content area.
Outer footer	The background of the top footer area. The background set here can be partially overridden for the center portion of the top footer by the **Footer** setting below.
Footer	The background of the center portion of the top footer.
Outer footer 1	The background of the second footer area. The background set here can be partially overridden for the center portion of the top footer by the **Footer 1** setting below.
Footer 1	The background of the center portion of the second footer.

Typography

Controls the appearance of text formatted using text styles.

Element	Controls...
Normal	Appearance of text formatted using the **Normal** text style. Most – but not all – body text and text labels throughout your site are formatted using the Normal style. For linked text, the **Link** setting (below) will override the **Text** setting.
Narrow	Appearance of text formatted using the **Narrow** text style.

Link	Appearance of text links. The **Link** setting will supercede the **Text** s etting above for text links.
Link on hover	Appearance of the text links when a mouse pointer hovers over them.
Page title	Appearance of text formatted using the **Page title** text style.
H1	Appearance of headings formatted using the **H1** style.
H2	Appearance of headings formatted using the **H2** style.
H3	Appearance of headings formatted using the **H3** style. Examples include: • Section titles on event calendar gadgets • **Select membership level** heading on membership application gadgets • **Subscription form** heading on subscription form gadgets • **Donations** heading on donation gadgets • Captcha **Security check** heading
H4	Appearance of headings formatted using the **H4** style. Examples include: • Gadget titles • Blog post titles • Forum headings • Forum summary headings • Event names within event calendar • **Registration** heading within event details
H5	Appearance of headings formatted using the H5 style.
Quoted	Appearance of text formatted using the **Quoted text** style.
Text alternative	Appearance of text formatted using the **Alternative text** style.

Form

Element	**Controls...**
Labels	Appearance of field labels on forms such as event registration, email subscription, and membership application. If you do not specify settings here, the **General formatting > Text** settings (above) will be applied to form labels.
Option title	Appearance of text labels for radio buttons or check boxes, as well as level names and descriptions on membership application forms.
Caption	Appearance of headings on member details and member profile screens.
Field explanation	Appearance of field instructions added to form fields, as well as level descriptions on membership application forms.

Table

Controls the appearance of tables used to display database information in gadgets such as the member directory gadget. These settings do not control the appearance of tables you insert into content pages.

Element	**Controls...**
Header	Appearance of the column headings at the top of the table.

Table row	Appearance of rows within the table
Table row on hover	Background color of a row when a mouse pointer hovers over it.
Table links	Font color of text links within the table.
Table links on hover	Font color of text links within the table when a mouse pointer hovers over them.

Info box

Controls the appearance of the areas used to list information within gadgets.

Examples: upcoming events, event details, forum topics and messages

Element	Controls...
Links	Font color of text links within the info box.
Links on hover	Font color of text links within the info box when a mouse pointer hovers over them.
Header	Appearance of headings at the top of each info box.
Header on hover	Font color of text links with the info box heading when a mouse pointer hovers over them.

Box

Element	Controls...
Background color	Background color of boxes appearing on certain gadgets (e.g. blog gadgets).
Header	Appearance of the header area at the top of the box.
Header link	Appearance of links within the header area at the top of the box.
Header link on hover	Appearance of links within the header area at the top of the box when a mouse pointer hovers over them.
Label	Appearance of labels within the box.
Text	Appearance of text within the box.
Link	Appearance of links within the box.
Link on hover	Appearance of links within the box when a mouse pointer hovers over them.
Footer	Background color of the area at the bottom of the box.
Footer link	Appearance of links within the footer area.
Footer link on hover	Appearance of links within the footer area when a mouse pointer hovers over them.

List

Controls the appearance of text within lists such as the list of forum topics.

Element	Controls...
Text	Appearance of text within the list.

Link	Appearance of links within the list.
Link on hover	Appearance of links within the list when a mouse pointer hovers over them.
Row	Background color of rows within the list.
Highlighted row	Background color of highlighted row within the list.

Gadget styles

For each of the available gadget styles for this theme, you can customize the following elements:

Element	Controls...
Title	The appearance of the gadget title. You can specify text attributes for the title text, and a background color or image for the title bar. You can select a color from the drop-down palette or enter the hexadecimal code for the color. If you specify a background image – by clicking the ellipsis button (...) – you can use the **Backgroun d repeat** setting to control whether and how the image is repeated.
Body	The appearance of the gadget body. You can specify text attributes for the body text, and a background color or image for the body area. You can select a color from the drop-down palette or enter the hexadecimal code for the color. If you specify a background image – by clicking the ellipsis button (...) – you can use the **Back ground repeat** setting to control whether and how the image is repeated.
Link	Appearance of text links. The **Link** setting will supercede the **Text** s etting above for text links.
Link on hover	Appearance of the text links when a mouse pointer hovers over them.
Donation bar	The fill color of the donation progress bar. You can select a color from the drop-down palette or enter the hexadecimal code for the color.
Donation bar ground	The background color of the donation progress bar. You can select a color from the drop-down palette or enter the hexadecimal code for the color.
Date and time	Controls the appearance of the date and time labels within forum update gadgets and recent blog posts gadgets.
Location	Controls the appearance of the location label within upcoming events gadgets.
Author	Controls the appearance of the author label within forum update gadgets and recent blog posts gadgets.

Button styles

For each of the link button styles, you can customize the following elements:

Element	Controls...
Normal	The appearance of the link button. You can specify text attributes for the button label, and a background color for the button. You can select a color from the drop-down palette or enter the hexadecimal code for the color.

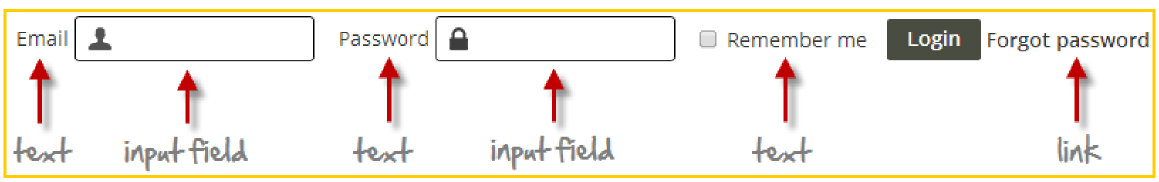
Hover	The appearance of the link button when a mouse pointer hovers over it. You can specify text attributes for the button label, and a background color for the button. You can select a color from the drop-down palette or enter the hexadecimal code for the color.

Menu

Element	Controls...
Main	Font family and size of top-level menu items.
Drop down	Font family and size of drop-down menu items

Login box

These are the elements that appear within a log in form gadget.



Element	Controls...
Input fields	Appearance of the login fields used to enter the username and password.
Text	Appearance of the text labels that accompany the login fields. If you do not specify settings here, the **General formatting > Typography > Text** settings (above) will be applied to the login box text labels. ***Examples:*** the **Remember me** checkbox label, the name of the logged in member
Links	Appearance of the text links that accompany the login fields. If you do not specify settings here, the **General formatting > Links** setti ngs (above) will be applied to login box links. ***Example:*** the **Forgot password** link
Links on hover	Appearance of the login links when a mouse pointer hovers over them. If you do not specify settings here, the **General formatting > Links on hover** settings (above) will be applied to login box links.

Breadcrumbs

These are the elements that appear within the breadcrumbs gadget.

Element	Controls...
General	Appearance of the breadcrumbs that show your current location within a set of subpages. If you do not specify settings here, the **Ge neral formatting > Typography> Text** settings (above) will be applied to the breadcrumbs.
Link	Color of the links within the breadcrumbs. If you do not specify settings here, the **General formatting > Links** settings (above) will be applied to the breadcrumb links.
Link on hover	Color of the breadcrumb links when a mouse pointer hovers over them. If you do not specify settings here, the **General formatting > Links on hover** settings (above) will be applied to the breadcrumb links.
Current page	Color of the current page within the breadcrumbs.

Navigation links

Controls the appearance of text links within navigation links gadgets.

Element	Controls...
Link	Font color of text links within navigation links.
Link on hover	Font color of navigation links when a mouse pointer hovers over them.

On this page:

See also:

- Customizing colors and styles
- Colors and styles settings by gadget

Color and style settings for Clean Lines, White Space, Dark Impact themes (deprecated)

Color and style settings for Clean Lines, White Space, Dark Impact themes (deprecated)

> The non-responsive versions of the Clean Lines, Dark Impact, and White Space theme sets have been deprecated – they has been superseded by newer responsive versions. For information on the responsive versions, see Clean Lines, Dark Impact, and White Space.

From the Colors and styles screen, you can change the colors and fonts of elements that appear throughout your site. Settings for different elements are grouped into categories. The categories vary depending on the website theme you have chosen.

Some elements on your site can be controlled by more than one setting. For example, a heading formatted using the H4 style that's also a link can be controlled using either the **General formatting > H4** setting or the **General formatting > Link** setting.

Some elements are general settings than be overridden or superseded by more specific elements. For example, the **Site** background setting under **General formatting > Backgrounds** can be overridden at the top of the page by one of the header settings, or in the middle of the page using one of the content settings.

> The settings appearing on the Color and Styles screen, and their order and default values, can be customized for a particular theme using theme overrides. For more information, see Customizing Colors and Styles options for themes.

You can modify the following elements for Clean Lines, White Space, and Dark Impact themes.

General formatting

General formatting settings apply throughout your website but can be superseded by more specific settings. For example, your **General formatting > Link** settings can be overridden for breadcrumbs by your **Login box > Links** settings.

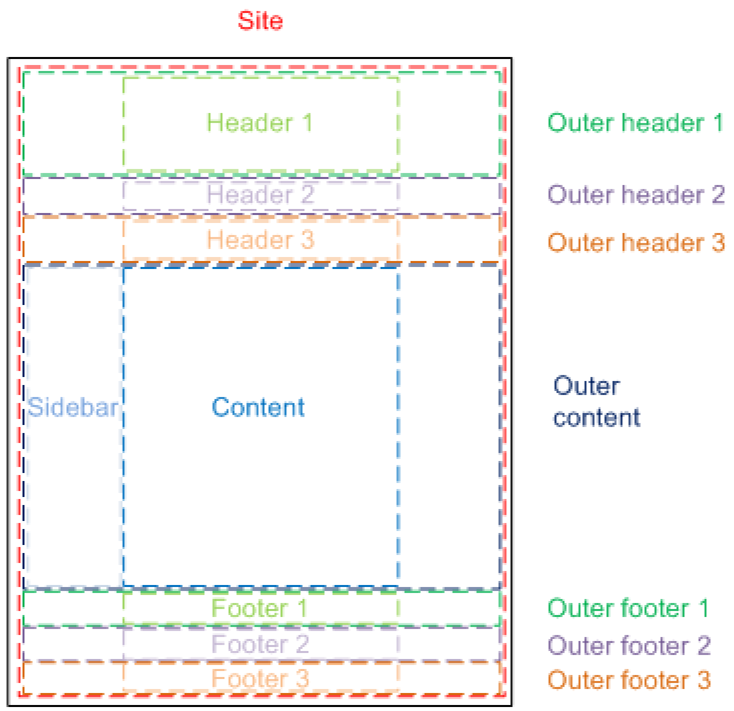
Backgrounds

For each of the elements below, you can control the following background attributes.

Attributes

Attribute	Description
Background color	The background color of the element. You can select a color from the drop-down palette or enter the hexadecimal code for the color (e.g. *#FF0000* for red).
Background image	An image to be displayed as the background the element. You can select an image by clicking the ellipsis button (...), or remove an image by clicking the X button. Using the **Background repeat** setti ng (below), you can control whether and how the image is repeated.
Background repeat	Controls whether the background is repeated horizontally or vertically, or both (tiled) or not at all.

Elements



Element	Controls...
Site	The overall background of your site. The background set here can be partially overridden by more localized background settings below.
Outer header 1	The background of the header area at the top. The background set here can be partially overridden for the center portion of the top header by the **Header 1** setting below.
Header 1	The background of the center portion of the header area at the top.
Outer header 2	The background of the area directly below the header area at the top. The background set here can be partially overridden for the center portion of the area by the **Header 2** setting below.
Header 2	The background of the center portion of the area directly below the header area at the top.
Outer header 3	The background of the area directly below Header 2. The background set here can be partially overridden for the center portion of the area by the **Header 3** setting below.
Header 3	The background of the center portion of the area directly below Header 2.
Outer sidebar	The background of the sidebar to the left of the **Content** area.
Sidebar	The background of the rightmost portion of the sidebar.
Outer content	The background of the main content area of the page. The background set here can be partially overridden for the center portion of the area by the **Content** setting below, and for the leftmost portion using the **Outer sidebar** and **Sidebar** settings above.
Content	The background of the center portion of the main content area.

Outer footer	The background of the top footer. The background set here can be partially overridden for the center portion of the top footer by the **Fo oter 1** setting below.
Footer 1	The background of the center portion of the top footer.
Outer footer 2	The background of the second footer area. The background set here can be partially overridden for the center portion of the top footer by the **Footer 2** setting below.
Footer 2	The background of the center portion of the second footer.
Outer footer 3	The background of the third footer area. The background set here can be partially overridden for the center portion of the top footer by the **Footer 3** setting below.
Footer 3	The background of the center portion of the third footer.

Typography

Element	**Controls...**
Text	Appearance of most – but not all – body text and text labels throughout your site. For linked text, the **Link** setting (below) will override the **Text** setting.
Link	Appearance of text links. The **Link** setting will supercede the **Text** s etting above for text links.
Link on hover	Appearance of the text links when a mouse pointer hovers over them.
H1	Appearance of headings formatted using the H1 style. These headings appear in HTML code within <h1> tags and can be applied using the text style drop-down when editing a content gadget.
H2	Appearance of headings formatted using the H2 style. These headings appear in HTML code within <h1> tags.
H3	Appearance of headings formatted using the H3 style. Examples include: • Section titles on event calendar gadgets • **Select membership level** heading on membership application gadgets • **Subscription form** heading on subscription form gadgets • **Donations** heading on donation gadgets • Captcha **Security check** heading
H4	Appearance of headings formatted using the H4 style. Examples include: • Gadget titles • Blog post titles • Forum headings • Forum summary headings • Event names within event calendar • **Registration** heading within event details
Quoted	Appearance of text formatted using the Quoted style. The text will appear in the HTML code within <span class="quotedText"> tags.

Text highlighted	Appearance of text formatted using the Highlighted style. The text will appear in the HTML code within <span class="contStyleExcInlineHighlighted"> tags.

Form

Element	Controls...
Labels	Appearance of field labels on forms such as event registration, email subscription, and membership application. If you do not specify settings here, the **General formatting > Text** settings (above) will be applied to form labels.
Option title	Appearance of text labels for radio buttons or check boxes, as well as level names and descriptions on membership application forms.
Caption	Appearance of headings on member details and member profile screens.
Field explanation	Appearance of field instructions added to form fields, as well as level descriptions on membership application forms.

Table

Controls the appearance of tables used to display database information in gadgets such as the member directory gadget. These settings do not control the appearance of tables you insert into content pages.

Element	Controls...
Header	Appearance of the column headings at the top of the table.
Table row	Appearance of rows within the table
Table row on hover	Background color of a row when a mouse pointer hovers over it.
Table links	Font color of text links within the table.
Table links on hover	Font color of text links within the table when a mouse pointer hovers over them.

Info box

Controls the appearance of the areas used to list information within gadgets.

Examples: upcoming events, event details, forum topics and messages

Element	Controls...
Links	Font color of text links within the info box.
Links on hover	Font color of text links within the info box when a mouse pointer hovers over them.
Header	Appearance of headings at the top of each info box.
Header on hover	Font color of text links with the info box heading when a mouse pointer hovers over them.

Box

Element	Controls...

Background color	Background color of boxes appearing on certain gadgets (e.g. blog gadgets).
Header	Appearance of the header area at the top of the box.
Header link	Appearance of links within the header area at the top of the box.
Header link on hover	Appearance of links within the header area at the top of the box when a mouse pointer hovers over them.
Label	Appearance of labels within the box.
Text	Appearance of text within the box.
Link	Appearance of links within the box.
Link on hover	Appearance of links within the box when a mouse pointer hovers over them.
Footer	Background color of the area at the bottom of the box.
Footer link on hover	Appearance of links at the bottom the box.

List

Controls the appearance of text within lists such as the list of forum topics.

Element	Controls...
Text	Appearance of text within the list.
Link	Appearance of links within the list.
Link on hover	Appearance of links within the list when a mouse pointer hovers over them.
Row	Background color of rows within the list.
Highlighted row	Background color of highlighted row within the list.

Gadget styles

For each of the available gadget styles for this theme, you can customize the following elements:

Element	Controls...
Title	The appearance of the gadget title. You can specify text attributes for the title text, and a background color or image for the title bar. You can select a color from the drop-down palette or enter the hexadecimal code for the color. If you specify a background image – by clicking the ellipsis button (...) – you can use the **Backgroun d repeat** setting to control whether and how the image is repeated.
Text	The appearance of the gadget body. You can specify text attributes for the body text, and a background color or image for the body area. You can select a color from the drop-down palette or enter the hexadecimal code for the color. If you specify a background image – by clicking the ellipsis button (...) – you can use the **Back ground repeat** setting to control whether and how the image is repeated.
Link	Appearance of text links. The **Link** setting will supercede the **Text** s etting above for text links.

Link on hover	Appearance of the text links when a mouse pointer hovers over them.

Donation goal

For each of the donation goal gadget styles, you can customize the following elements:

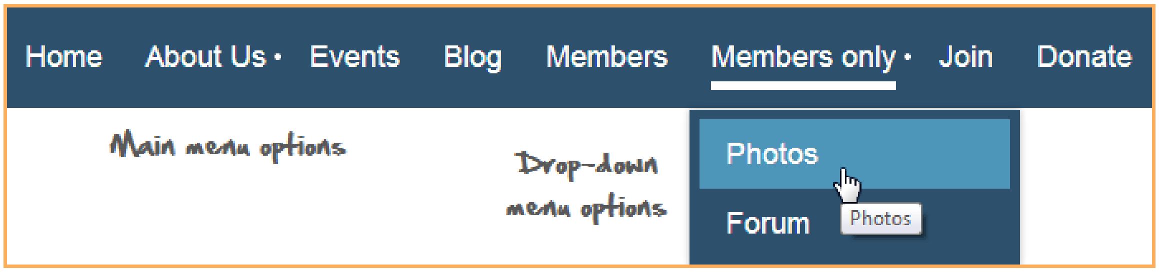
Element	**Controls...**
Title	The appearance of the gadget title. You can specify text attributes for the title text, and a background color or image for the title bar. You can select a color from the drop-down palette or enter the hexadecimal code for the color. If you specify a background image – by clicking the ellipsis button (...) – you can use the **Backgroun d repeat** setting to control whether and how the image is repeated.
Text	The appearance of the gadget body. You can specify text attributes for the body text, and a background color or image for the body area. You can select a color from the drop-down palette or enter the hexadecimal code for the color. If you specify a background image – by clicking the ellipsis button (...) – you can use the **Back ground repeat** setting to control whether and how the image is repeated.
Link	Appearance of text links. The **Link** setting will supercede the **Text** s etting above for text links.
Link on hover	Appearance of the text links when a mouse pointer hovers over them.
Donation bar	The fill color of the donation progress bar. You can select a color from the drop-down palette or enter the hexadecimal code for the color.
Donation bar ground	The background color of the donation progress bar. You can select a color from the drop-down palette or enter the hexadecimal code for the color.

Button styles

For each of the link button styles, you can customize the following elements:

Element	**Controls...**
Normal	The appearance of the link button. You can specify text attributes for the button label, and a background color for the button. You can select a color from the drop-down palette or enter the hexadecimal code for the color.
Hover	The appearance of the link button when a mouse pointer hovers over it. You can specify text attributes for the button label, and a background color for the button. You can select a color from the drop-down palette or enter the hexadecimal code for the color.

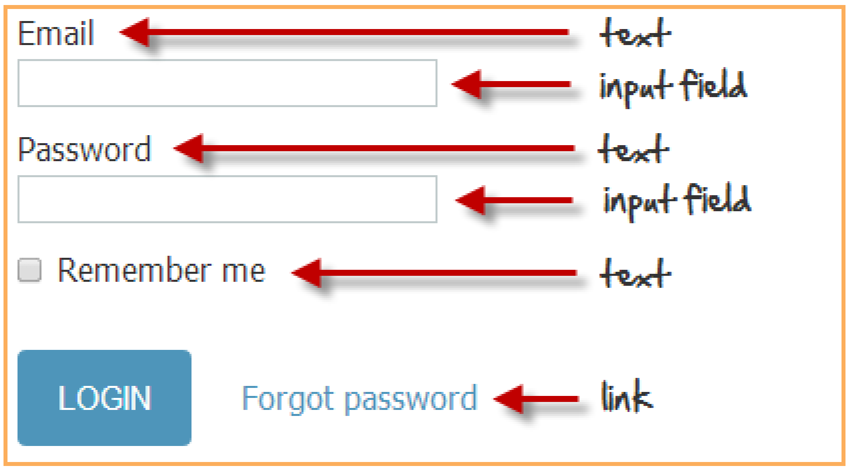
Menu



Element	Controls...
Main	Font family and size of top-level menu items.
Drop down	Font family and size of drop-down menu items

Login box

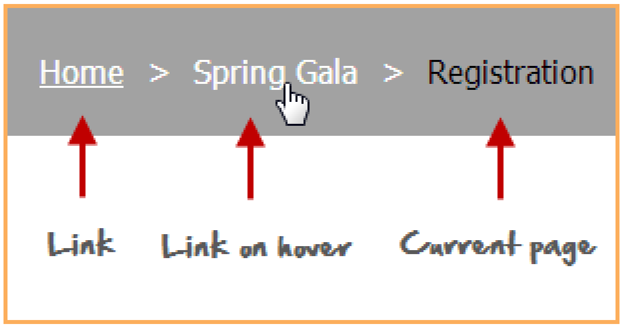
These are the elements that appear within a log in form gadget.



Element	Controls...
Input fields	Appearance of the login fields used to enter the username and password.
Text	Appearance of the text labels that accompany the login fields. If you do not specify settings here, the **General formatting > Typography > Text** settings (above) will be applied to the login box text labels. ***Examples:*** the **Remember me** checkbox label, the name of the logged in member
Links	Appearance of the text links that accompany the login fields. If you do not specify settings here, the **General formatting > Links** setti ngs (above) will be applied to login box links. ***Example:*** the **Forgot password** link
Links on hover	Appearance of the login links when a mouse pointer hovers over them. If you do not specify settings here, the **General formatting > Links on hover** settings (above) will be applied to login box links.

Breadcrumbs

These are the elements that appear within the breadcrumbs gadget.



Element	Controls...
General	Appearance of the breadcrumbs that show your current location within a set of subpages. If you do not specify settings here, the **General formatting > Typography> Text** settings (above) will be applied to the breadcrumbs.
Link	Color of the links within the breadcrumbs. If you do not specify settings here, the **General formatting > Links** settings (above) will be applied to the breadcrumb links.
Link on hover	Color of the breadcrumb links when a mouse pointer hovers over them. If you do not specify settings here, the **General formatting > Links on hover** settings (above) will be applied to the breadcrumb links.
Current page	Color of the current page within the breadcrumbs.

Navigation links

Controls the appearance of text links within navigation links gadgets.

Element	Controls...
Link	Font color of text links within navigation links.
Link on hover	Font color of navigation links when a mouse pointer hovers over them.

On this page:

See also:

- Customizing colors and styles
- Colors and styles settings by gadget

Color and style settings for Treehouse themes (deprecated)

Color and style settings for Treehouse themes (deprecated)

> The non-responsive version of the Treehouse theme set has been deprecated – it has been superseded by a newer responsive version. For information on the responsive version, see Treehouse theme set.

From the Colors and styles screen, you can change the colors and fonts of elements that appear throughout your site. Settings for different elements are grouped into categories. The categories vary depending on the website theme you have chosen.

Some elements on your site can be controlled by more than one setting. For example, a heading formatted using the H4 style that's also a link can be controlled using either the **General formatting > H4** setting or the **General formatting > Link** setting.

Some elements are general settings than be overridden or superseded by more specific elements. For example, the **Site** background setting under **General formatting > Backgrounds** can be overridden at the top of the page by one of the header settings, or in the middle of the page using one of the content settings.

> The settings appearing on the Color and Styles screen, and their order and default values, can be customized for a particular theme using theme overrides. For more information, see Customizing Colors and Styles options for themes.

You can modify the following elements for the Treehouse themes.

General formatting

General formatting settings apply throughout your website but can be superseded by more specific settings. For example, your **General formatting > Link** settings can be overridden for breadcrumbs by your **Login box > Links** settings.

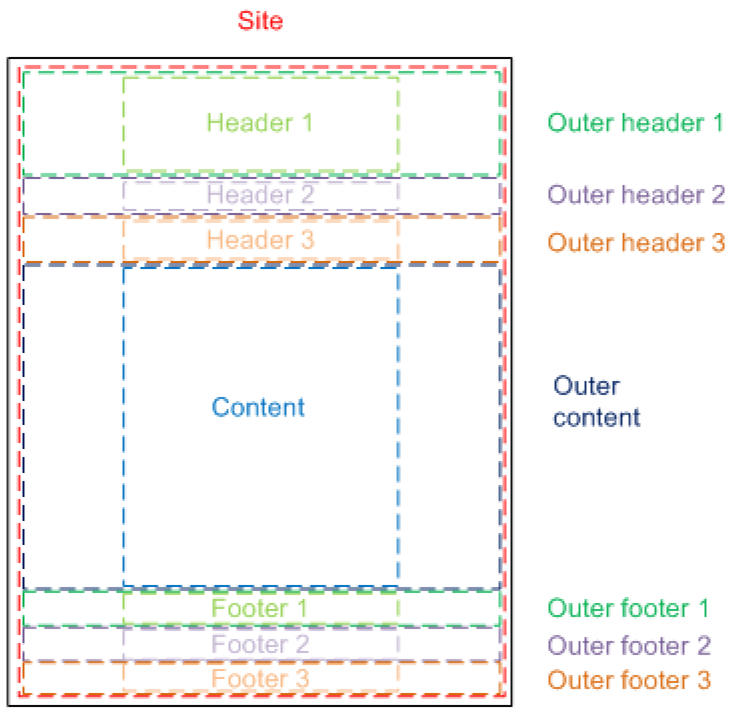
Backgrounds

For each of the elements below, you can control the following background attributes.

Attributes

Attribute	Description
Background color	The background color of the element. You can select a color from the drop-down palette or enter the hexadecimal code for the color (e.g. *#FF0000* for red).
Background image	An image to be displayed as the background the element. You can select an image by clicking the ellipsis button (...), or remove an image by clicking the X button. Using the **Background repeat** setti ng (below), you can control whether and how the image is repeated.
Background repeat	Controls whether the background is repeated horizontally or vertically, or both (tiled) or not at all.

Elements



Element	Controls...
Site	The overall background of your site. The background set here can be partially overridden by more localized background settings below.
Outer header 1	The background of the header area at the top. The background set here can be partially overridden for the center portion of the top header by the **Header 1** setting below.
Header 1	The background of the center portion of the header area at the top.
Outer header 2	The background of the area directly below the header area at the top. The background set here can be partially overridden for the center portion of the area by the **Header 2** setting below.
Header 2	The background of the center portion of the area directly below the header area at the top.
Outer header 3	The background of the area directly below Header 2. The background set here can be partially overridden for the center portion of the area by the **Header 3** setting below.
Header 3	The background of the center portion of the area directly below Header 2.
Outer content	The background of the main content area of the page. The background set here can be partially overridden for the center portion of the area by the **Content** setting below.
Content	The background of the center portion of the main content area.
Outer footer	The background of the top footer. The background set here can be partially overridden for the center portion of the top footer by the **Fo oter 1** setting below.
Footer 1	The background of the center portion of the top footer.

Outer footer 2	The background of the second footer area. The background set here can be partially overridden for the center portion of the top footer by the **Footer 2** setting below.
Footer 2	The background of the center portion of the second footer.
Outer footer 3	The background of the third footer area. The background set here can be partially overridden for the center portion of the top footer by the **Footer 3** setting below.
Footer 3	The background of the center portion of the third footer.

Typography

Element	**Controls...**
Text	Appearance of most – but not all – body text and text labels throughout your site. For linked text, the **Link** setting (below) will override the **Text** setting.
Link	Appearance of text links. The **Link** setting will supercede the **Text** s etting above for text links.
Link on hover	Appearance of the text links when a mouse pointer hovers over them.
H1	Appearance of headings formatted using the H1 style. These headings appear in HTML code within <h1> tags and can be applied using the text style drop-down when editing a content gadget.
H2	Appearance of headings formatted using the H2 style. These headings appear in HTML code within <h1> tags.
H3	Appearance of headings formatted using the H3 style. Examples include: • Section titles on event calendar gadgets • **Select membership level** heading on membership application gadgets • **Subscription form** heading on subscription form gadgets • **Donations** heading on donation gadgets • Captcha **Security check** heading
H4	Appearance of headings formatted using the H4 style. Examples include: • Gadget titles • Blog post titles • Forum headings • Forum summary headings • Event names within event calendar • **Registration** heading within event details
Quoted	Appearance of text formatted using the Quoted style. The text will appear in the HTML code within <span class="quotedText"> tags.
Text highlighted	Appearance of text formatted using the Highlighted style. The text will appear in the HTML code within <span class="contStyleExcInlineHighlighted"> tags.

Form

Element	Controls...
Labels	Appearance of field labels on forms such as event registration, email subscription, and membership application. If you do not specify settings here, the **General formatting > Text** settings (above) will be applied to form labels.
Option title	Appearance of text labels for radio buttons or check boxes, as well as level names and descriptions on membership application forms.
Caption	Appearance of headings on member details and member profile screens.
Field explanation	Appearance of field instructions added to form fields, as well as level descriptions on membership application forms.

Table

Controls the appearance of tables used to display database information in gadgets such as the member directory gadget. These settings do not control the appearance of tables you insert into content pages.

Element	Controls...
Header	Appearance of the column headings at the top of the table.
Table row	Appearance of rows within the table
Table row on hover	Background color of a row when a mouse pointer hovers over it.
Table links	Font color of text links within the table.
Table links on hover	Font color of text links within the table when a mouse pointer hovers over them.

Info box

Controls the appearance of the areas used to list information within gadgets.

Examples: upcoming events, event details, forum topics and messages

Element	Controls...
Links	Font color of text links within the info box.
Links on hover	Font color of text links within the info box when a mouse pointer hovers over them.
Header	Appearance of headings at the top of each info box.
Header on hover	Font color of text links with the info box heading when a mouse pointer hovers over them.

Box

Element	Controls...
Background color	Background color of boxes appearing on certain gadgets (e.g. blog gadgets).
Header	Appearance of the header area at the top of the box.
Header link	Appearance of links within the header area at the top of the box.

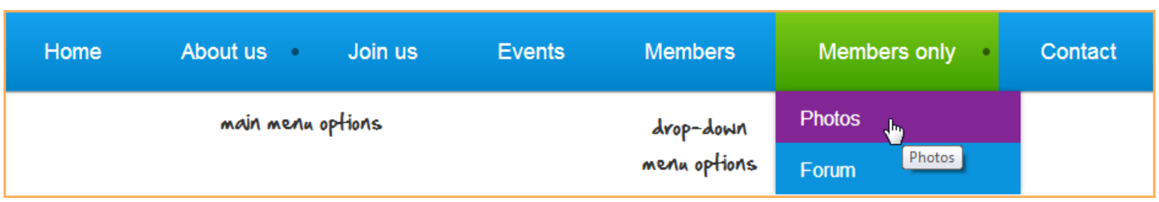
Header link on hover	Appearance of links within the header area at the top of the box when a mouse pointer hovers over them.
Label	Appearance of labels within the box.
Text	Appearance of text within the box.
Link	Appearance of links within the box.
Link on hover	Appearance of links within the box when a mouse pointer hovers over them.
Footer	Background color of the area at the bottom of the box.
Footer link on hover	Appearance of links at the bottom the box.

List

Controls the appearance of text within lists such as the list of forum topics.

Element	Controls...
Text	Appearance of text within the list.
Link	Appearance of links within the list.
Link on hover	Appearance of links within the list when a mouse pointer hovers over them.
Row	Background color of rows within the list.
Highlighted row	Background color of highlighted row within the list.

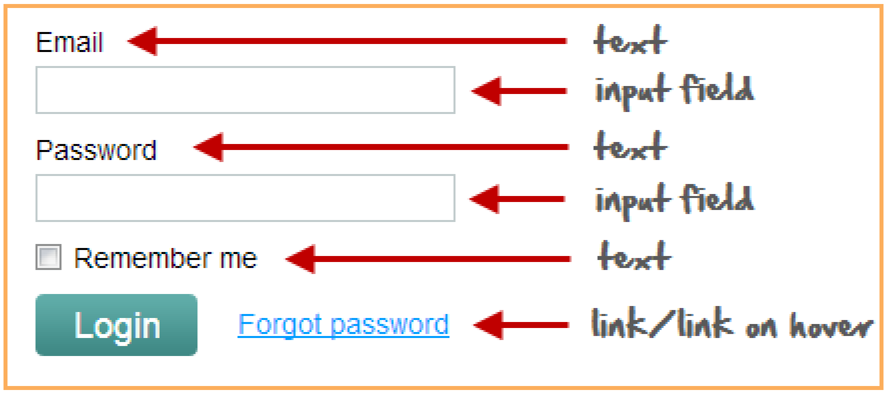
Menu



Element	Controls...
Main	Font family and size of top-level menu items.
Drop down	Font family and size of drop-down menu items

Login box

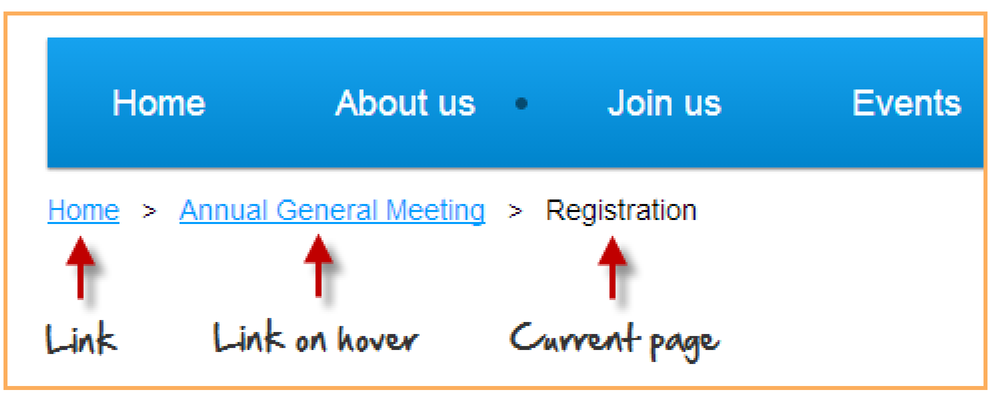
These are the elements that appear within a log in form gadget.



Element	Controls...
Input fields	Appearance of the login fields used to enter the username and password.
Text	Appearance of the text labels that accompany the login fields. If you do not specify settings here, the **General formatting > Typography > Text** settings (above) will be applied to the login box text labels. ***Examples:*** the **Remember me** checkbox label, the name of the logged in member
Links	Appearance of the text links that accompany the login fields. If you do not specify settings here, the **General formatting > Links** setti ngs (above) will be applied to login box links. ***Example:*** the **Forgot password** link
Links on hover	Appearance of the login links when a mouse pointer hovers over them. If you do not specify settings here, the **General formatting > Links on hover** settings (above) will be applied to login box links.

Breadcrumbs

These are the elements that appear within the breadcrumbs gadget.



Element	Controls...
General	Appearance of the breadcrumbs that show your current location within a set of subpages. If you do not specify settings here, the **Ge neral formatting > Typography> Text** settings (above) will be applied to the breadcrumbs.

Link	Color of the links within the breadcrumbs. If you do not specify settings here, the **General formatting > Links** settings (above) will be applied to the breadcrumb links.
Link on hover	Color of the breadcrumb links when a mouse pointer hovers over them. If you do not specify settings here, the **General formatting > Links on hover** settings (above) will be applied to the breadcrumb links.
Current page	Color of the current page within the breadcrumbs.

Navigation links

Controls the appearance of text links within navigation links gadgets.

Element	Controls...
Link	Font color of text links within navigation links.
Link on hover	Font color of navigation links when a mouse pointer hovers over them.

On this page:

See also:

- Customizing colors and styles
- Colors and styles settings by gadget

Setting the site background

Setting the site background

You can set a background image or color for your site – or for sections within your site – from the Colors & styles screen. If a background image or color already appears in your theme, you can change or remove it. You can also select background images or colors for placeholders, layouts, and content gadgets when editing them from the Site pages screen.

When selecting a background image, you can choose from the theme-specific image library, or choose an image file from your Wild Apricot account. For information on customizing the images that are available from your theme-specific image library, see Customizing theme background options.

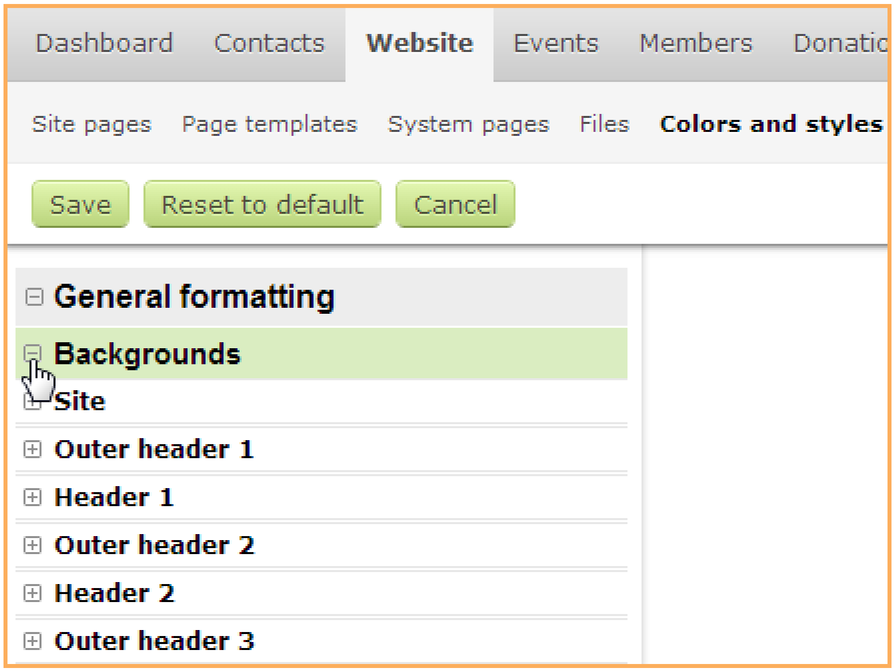
> You can also assign a background image or color to layouts, content gadgets, and placeholders.

Setting a background image or color

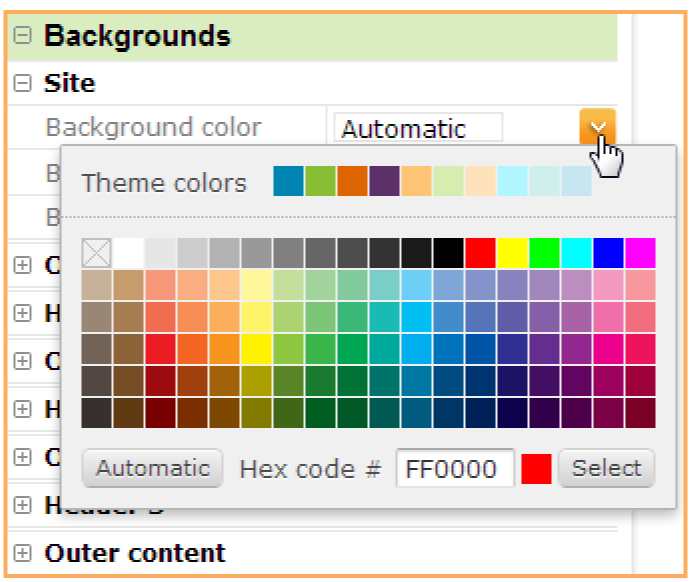
To set the site background or color, follow these steps:

Read more/less

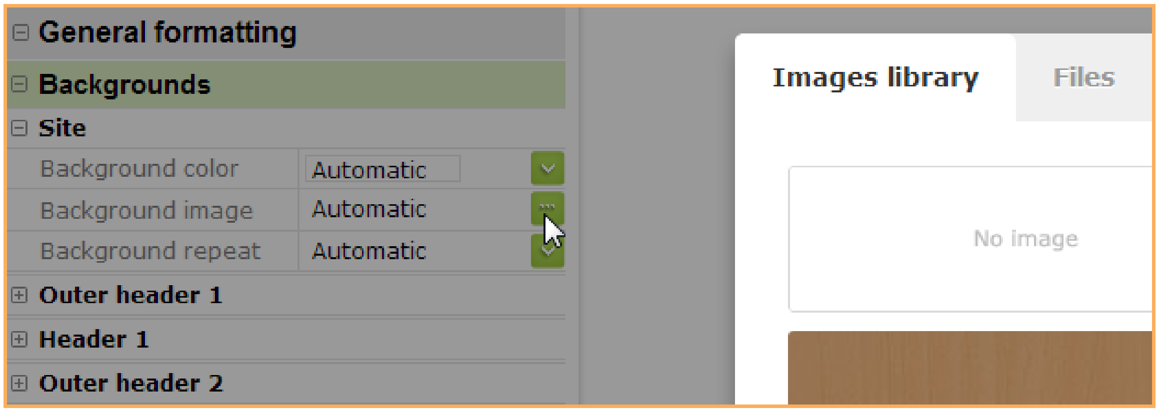
1. Click **Colors and styles** under the **Website** menu.
2. For Blueprint, Bookshelf, Building Blocks, Clean Lines, Dark Impact, Fiesta, Firma, Homestead, Kaleidoscope, Showcase, Skyline, Terra, Tinted Tiles, Treehouse, Whiteboard, and White Space themes, expand the **Backgrounds** section. For all other themes, expand the **Site** section.



3. For Business Casual and Granite themes, expand the **Content** subsection. For Blueprint, Bookshelf, Building Blocks, Clean Lines, Dark Impact, Fiesta, Firma, Homestead, Kaleidoscope, Showcase, Skyline, Terra, Tinted Tiles, Treehouse, Whiteboard, and White Space themes, expand the section where you want to set the background image or color. For example, you might want to set or change the background for the entire site or just for the outer header. For more information on section choices, see Setting the background for sections (below).
4. To set a background color, click the down arrow to the right of the **Background color** option. From the color palette that appears, you can select a color or enter the hexadecimal code for the color (e.g. *#FF0000* for red). Colors that are used in or compatible with the current theme appear along the top of the palette.



5. To set a background image, click the ellipsis button (...) to the right of the **Background image** option and choose an image from the theme-specific image library or one from your Wild Apricot account.



To remove an existing image, click the X button.

6. If you selected a background image, you can use the **Behavior** options to control how your image appears within the available space. You can choose from the following options:

Option	Description	
Tile	The image will be repeated horizontally and vertically to completely fill the available space.	
No repeat or scaling	The image will displayed as is, and will be not be repeated or scaled.	
Repeat horizontally	The image will be repeated horizontally to fill the width of the available space.	
Repeat vertically	The image will be repeated vertically to fill the height of the available space.	
Fill	The image will be stretched to completely fill the available space, and may therefore appear distorted.	
Cover	The image will be proportionally resized to cover the available space, and may therefore be cropped.	
Scale by height	The image will be proportionally resized to fit the height of the available space. Depending on the dimensions of the space, the image may be cropped, or may not fill the entire width of the space.	
Scale by width	The image will be proportionally resized to fit the width of the available space. Depending on the dimensions of the space, the image may be cropped, or may not fill the entire height of the space	

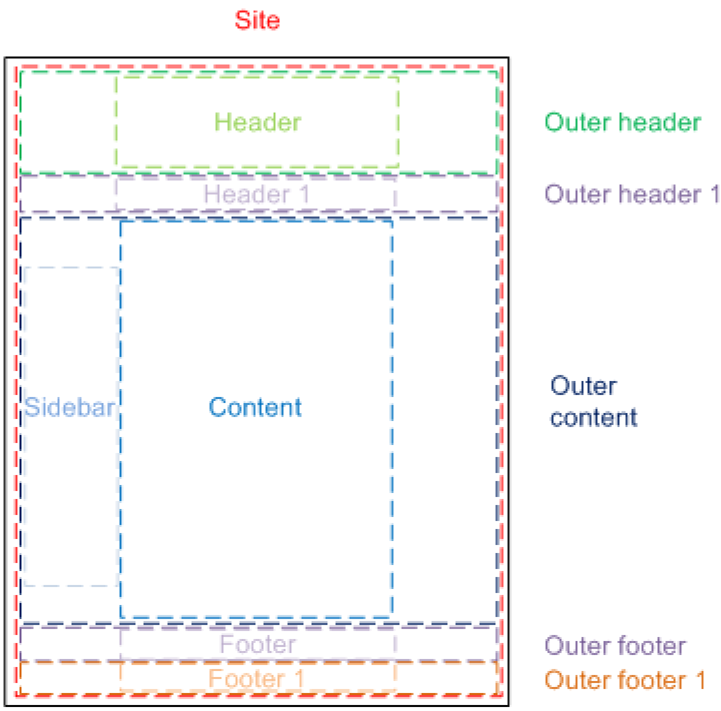
7. Click the **Save** button to save your changes.

Setting the background for individual sections

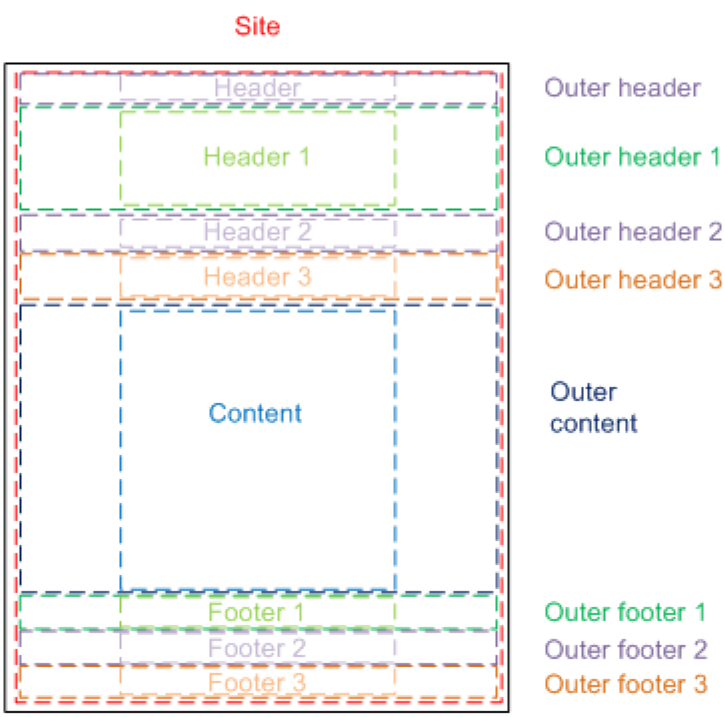
You can apply background images or colors to different sections within your site pages. The sections that are available vary by theme.
Read more/less

For Business Casual, Granite, and Nature themes, you can only set an overall site background.

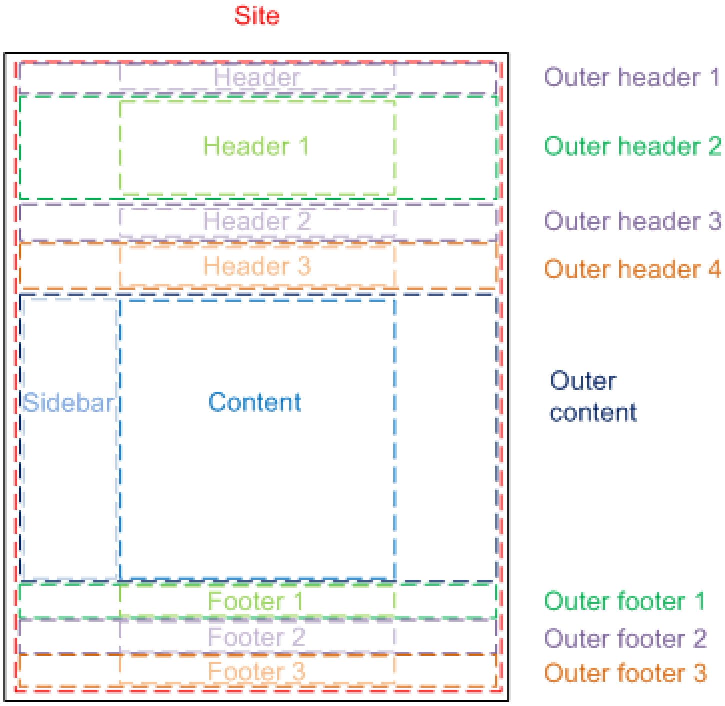
For Blueprint themes, you can set the background image or color for the following sections:



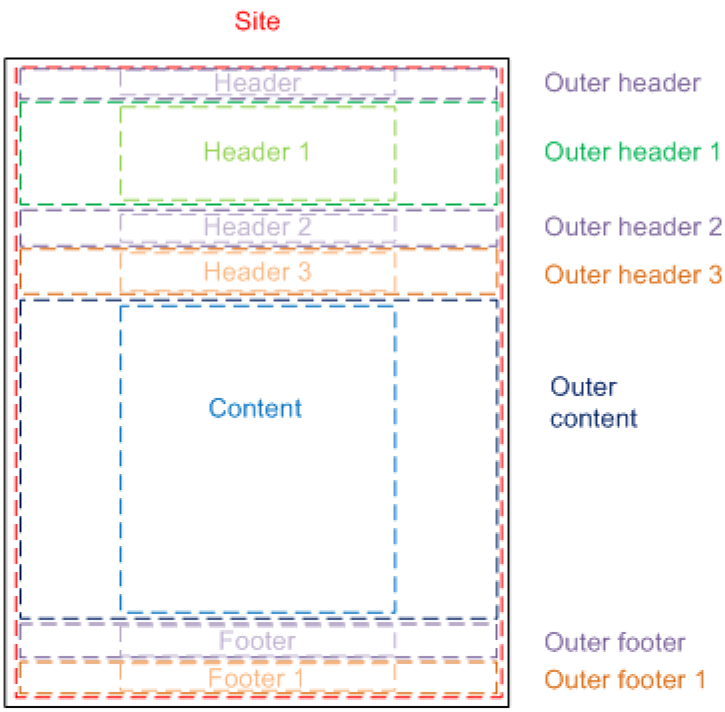
For Bookshelf and Whiteboard themes, you can set the background image or color for the following sections:



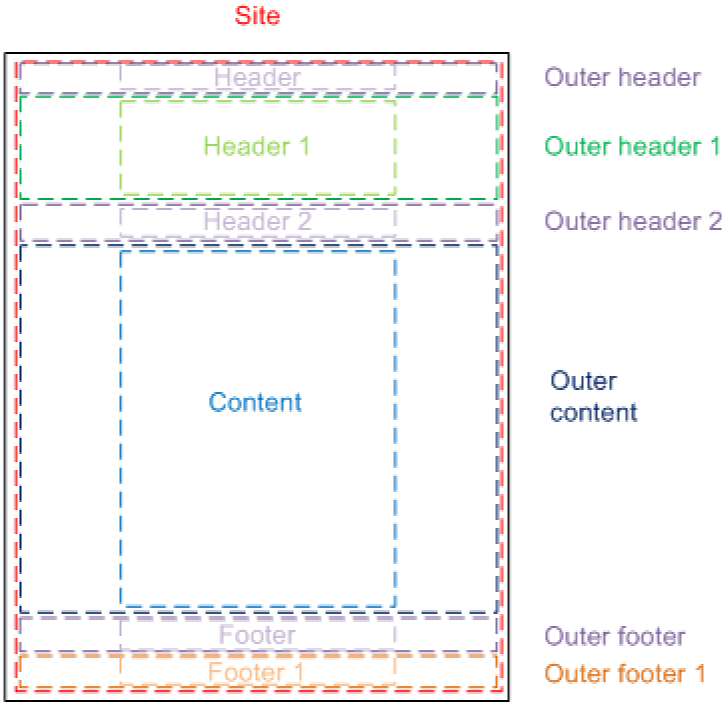
For Clean Lines, White Space, and Dark Impact themes, you can set the background image or color for the following sections:



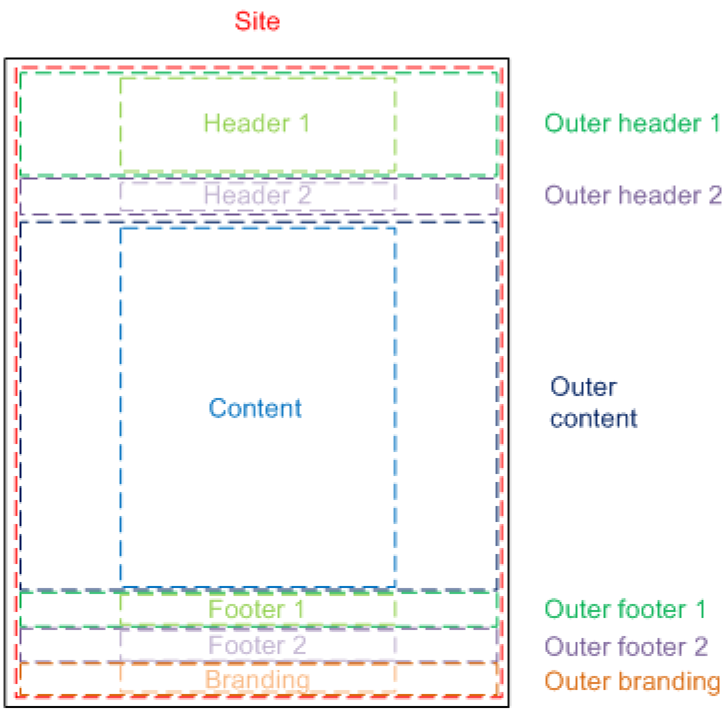
For Fiesta themes, you can set the background image or color for the following sections:



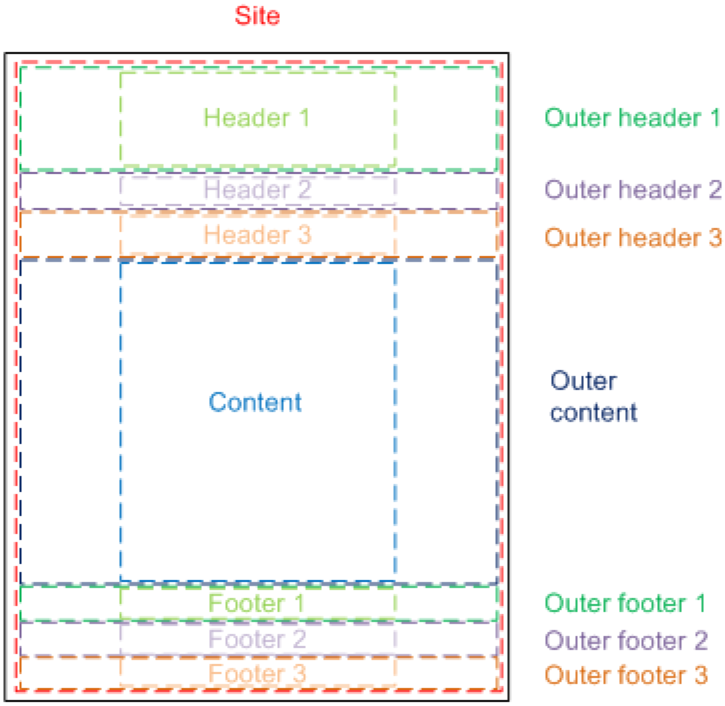
For Firma, Homestead, Showcase, Skyline, and Terra themes, you can set the background image or color for the following sections:



For Building Blocks, Kaleidoscope, and Tinted Tiles themes, you can set the background image or color for the following sections:



For Treehouse themes, you can set the background image or color for the following sections:



On this page:

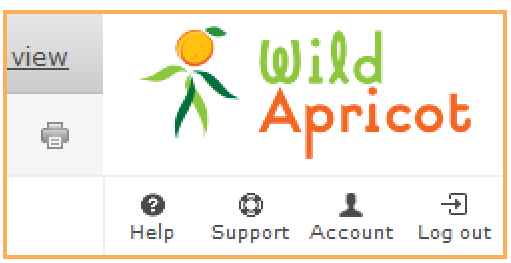
- Setting a background image or color
- Setting the background for individual sections

Expand all sections

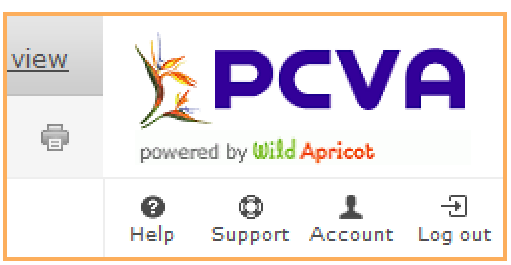
Replacing the admin logo

Replacing the admin logo

You can replace the Wild Apricot logo that appears in the upper right corner in admin view with your own logo.



Your logo will appear above a "powered by Wild Apricot" banner.



You might want to replace the Wild Apricot admin logo because you are a partner providing site design or maintenance services, and you want to increase the visibility of your brand.

You can only replace the admin logo if you have a paid account.

Logo specifications

Your replacement logo must adhere to the following specifications.

File name	custom-admin-logo (e.g. custom-admin-logo.png)
File extension	.png, .gif, .jpg (or .jpeg)
Width	168 pixels
Height	49 pixels

If you choose an image file with different dimensions, it may end up appearing stretched or otherwise distorted.

Uploading the logo

Upload your replacement logo to the **Theme** folder from the Files screen or using WebDAV.

As soon as you refresh your screen, your replacement logo will appear.

If your logo doesn't appear, check the file name and format.

On this page:

Expand all sections

See also:

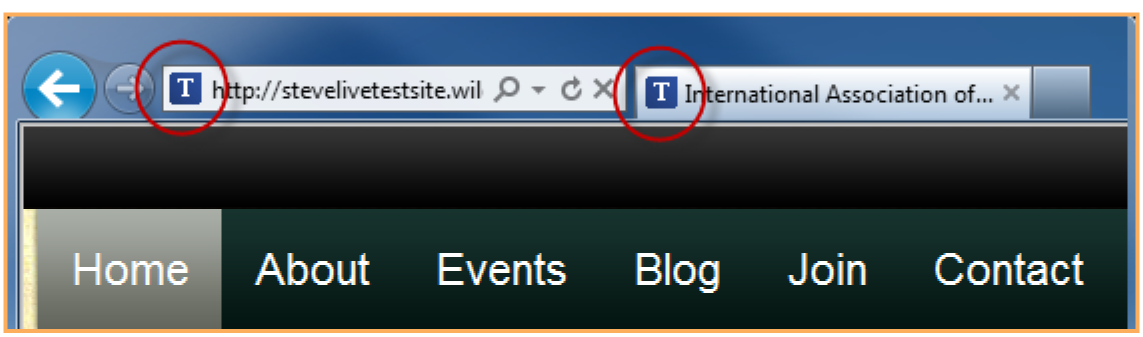
- Removing the "Powered by Wild Apricot" footer

Inserting a favorites icon

Inserting a favorites icon (aka favicon)

What is a favorites icon?

A favorites icon – also known as a favicon, shortcut icon, or website icon – is an icon that appears in the page tab and address bar of your browser when a particular site is displayed.



Wild Apricot allows you to display a custom icon for your site in place of the default one. This allows you to create a unique icon that uniquely identifies your Wild Apricot site.

On Google Chrome, the favorites icon only appears on the page tab, not on the address bar.

Icon file requirements

Your favorites icon must satisfy the following requirements:

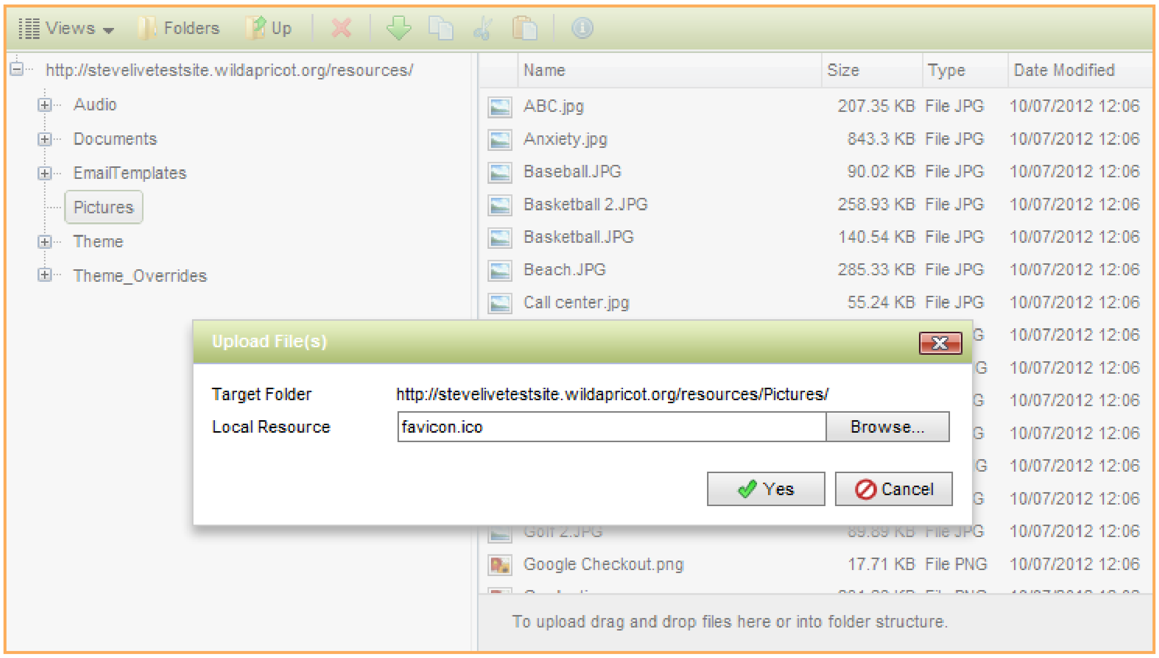
- File type: .ico
- Image size: 32x32 or 16x16 pixels

> ⓘ There are many free online .ico converters that can convert other image formats into an .ico file (e.g. http://www.icoconverter.com).

Uploading and linking to the favorites icon

Follow these steps to upload and link to your favorite icon:

1. Go to the Files screen by clicking **Files** under the **Website** menu.
2. Upload your favorites icon to the Pictures folder.



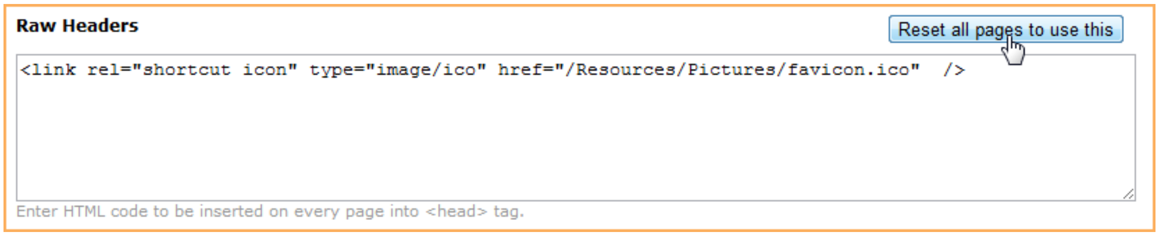
3. Under the **Settings** menu, click **Site**.
4. Within the Site settings screen, click **Meta-tags**.
5. In the **Raw Headers** section, paste the following code:

```
<link rel="shortcut icon" type="image/ico" href="/Resources/Pictures/filename"
/>
```

   replacing *filename* with the name of the icon file. For example, if your icon file was named favicon.ico, then the link code would appear as:

```
<link rel="shortcut icon" type="image/ico"
href="/Resources/Pictures/favicon.ico"  />
```

6. Click the **Reset all pages to use this** button.



7. Click **Save** button to save your changes.
8. Log out of your account to reload your site and see the results.

On this page:

- What is a favorites icon?
- Icon file requirements
- Uploading and linking to the favorites icon

Advanced site customization

Advanced site customization

Wild Apricot provides a number of interactive tools you can use to customize the look, feel, and functionality of your site. For experienced website designers and developers, Wild Apricot provides two additional methods for advanced site customization:

- CSS customization
- Theme overrides

Using CSS customization, you can add CSS code to control the styles that determine the appearance of elements within your site pages.

Using theme overrides, experienced web developers can customize existing Wild Apricot themes or create new ones. Theme overrides involves replacing or overriding theme files – the files that control the appearance of your current theme (i.e. the templates for your web pages).

To get started with advanced site customization, see the following help topics:

- CSS customization
- Theme overrides
- Partner directory

See also:

- Designing site pages
- Customizing colors and styles

CSS customization

CSS customization

Advanced customization warning - Reference information is provided as is
Wild Apricot technical support team does not provide support for CSS customization, JavaScript, or theme overrides. (Read more)

What is CSS?

CSS stands for Cascading Style Sheets. CSS code, stored in CSS files, is used to define the styles that determine the appearance of elements within your site pages. Different levels of headings, for example, could be defined using H1, H2, H3, or H4 styles. The overall appearance of website themes supplied by Wild Apricot is controlled by CSS (and an extension of CSS called LESS) stored in Theme.css (or Theme.less) files.

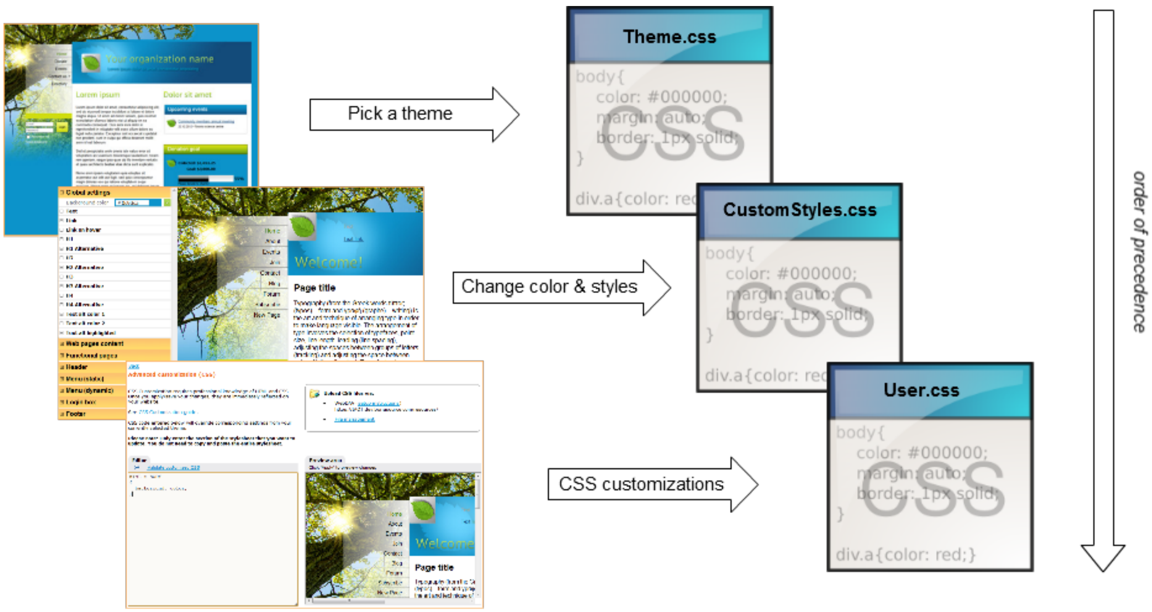
Customizing CSS

You can customize the CSS used to control the appearance of your site in several different ways:

- by choosing different settings from the Colors and styles screen
- by entering CSS code in the Advanced section of the settings for individual gadgets, layouts, and placeholders
- by entering CSS code on the **CSS customization** screen

> ⚠ Only full administrators or full website editors – not restricted website editors – can access the Colors and styles screen or the CSS customization screen.

The settings you choose on the **Colors and styles** screen are stored in a CustomStyles.css file and will override the CSS in your theme. The CSS code you enter within gadget, layout, and placeholder settings, and on the **CSS customization** screen, is stored in a User.css file and will override both the theme settings and the CustomStyles.css file.

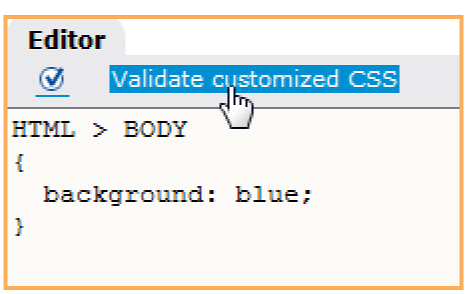


> ⓘ You can also customize your site by modifying or replacing individual theme files. For more information, see Theme overrides.

Entering CSS customization code

To enter CSS customization code, follow these steps:

1. Under the **Website** menu, click **CSS**.
2. In the **Editor** field, enter the code for your customization.
3. To check for errors in your code, click the **Validated customized CSS** link or click the checkmark icon beside it.



4. Click **Save** to preview your customization within the preview area on the right.
5. When you are finished making your changes, click **Cancel**.

> ⓘ Instead of entering CSS code here, you can use File management to upload a CSS file containing multiple customizations to the

Resources folder.

CSS customization examples

- Changing button colors
- Changing the widget width
- Customizing blogs using CSS
- Customizing forums using CSS and JavaScript
- Changing the page width

On this page:

- What is CSS?
- Customizing CSS
- Entering CSS customization code
- CSS customization examples

Expand all sections

See also:

- Introduction to CSS
- Identifying the page ID
- CSS, LESS, and JavaScript processing

Customization notice

Our technical support team does not provide support for CSS customization, Javascript coding or visual design

- Customization examples and instructions are provided as is
- We do not provide technical support related to advanced customization (theme overrides, JavaScript, or CSS customization)

Need more help? Check out:

- Our **customization forums**
- **Partner directory** to find a consultant

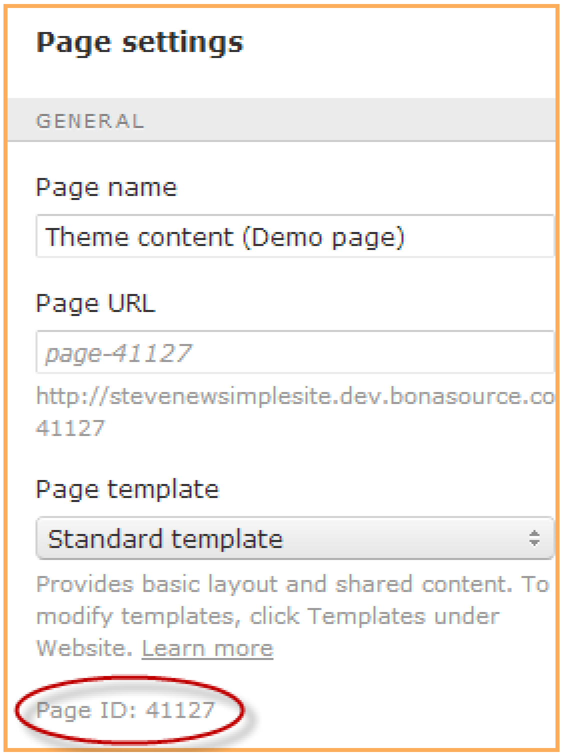
Finding the page ID

Finding the page ID

When you want to use CSS code to customize the appearance or behavior of elements on a particular page, you need to know its page ID.

To find the ID for a page, follow these steps:

1. Hover over the **Website** menu and select the **Sites pages** option.
2. Click the page within the list.
3. Click the **Edit** button.
4. Within the page settings that appear, the page ID appears at the bottom of the **General** section, under **Page template**.



To reference the page ID in code, you need to prefix it with #PAGEID_ (e.g. #PAGEID_41127).

Here is an example of CSS code referencing a specific page:

```
#PAGEID_41127 H2 {
  color: #ffff00;
}
```

Above example will change the color of H2 tags on the identified page.

Need more help?

- Check out our customization forums
- See our Partner directory to find a consultant

CSS customization examples

CSS customization examples

- Changing button colors
- Changing the widget width
- Customizing blogs using CSS
- Customizing forums using CSS and JavaScript
- Changing the page width

Changing button colors

Changing button colors

Advanced customization warning - Reference information is provided as is
Wild Apricot technical support team does not provide support for CSS customization, JavaScript, or theme overrides. (Read more)

You use CSS to change the color of buttons on various self-service forms.

In the following example, the code changes the color of the **Next** and **Cancel** buttons on membership application forms to red.

```
.navigationOuterContainer .navigationContainer .left input.nextButton{
background-color: red; /*use whichever color you would like*/
}

.navigationOuterContainer .navigationContainer .right input.nextButton{
background-color: red; /*use whichever color you would like*/
}
```

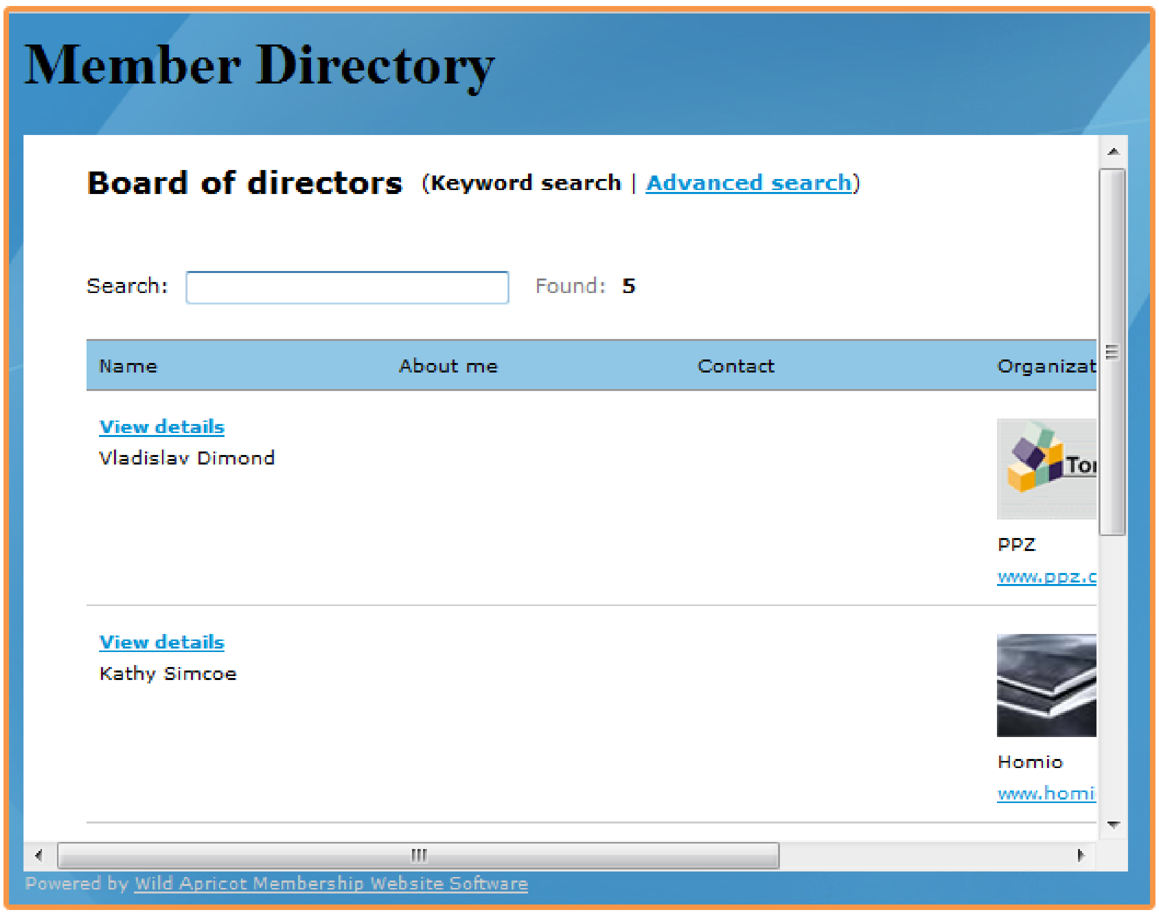
To apply CSS code to your Wild Apricot site, hover over the **Website** menu and select the **CSS** option. On the screen that appears, enter the code in the **Editor** panel, then click **Save** to preview your customization within the preview area on the right. When you are finished making your changes, click **Cancel** to close the screen.

Changing the widget width

Changing the widget width

> **Advanced customization warning - Reference information is provided as is**
> Wild Apricot technical support team does not provide support for CSS customization, JavaScript, or theme overrides. (Read more)

When using widgets to display information from your Wild Apricot database on another site, you may want to change the default size of the iframe containing the widget. For example, the widget might be wider than the site page, forcing users to scroll to view hidden information.



To adjust the width of all widgets, hover over the **Website** menu and select the **CSS** option. On the screen that appears, enter the appropriate code for your theme (see below), then click **Save** to preview your customization within the preview area on the right. When you are finished making your changes, click **Cancel** to close the screen.

This code changes the width of all widgets.

For Treehouse, Clean Lines, White Space, and Dark Impact themes

```
.widgetMode .s1_grid_12,
.widgetMode .container_12
{
   /* change 400px to any desired value */
   width: 400px !important;;
   margin-left: 0 !important;
}
```

For all other themes

```
.widgetMode .cnPrimaryContentContainer,
.widgetMode .cnPrimaryContentBlock1ContentHolder,
.widgetMode .cnPrimaryContentBlock1Content,
.widgetMode .cnContentContainer,
.widgetMode .cnClipMainContainer,
.widgetMode .cnMainContainer .d9MainContainer,
.widgetMode .cnMainContainer .cnContentContainer .cnPrimaryContentContainer
{
   /* change 400px to any desired value */
width: 400px !important;
}

.widgetMode .cnMainContainer, .widgetMode .cnMainContainerTopCorners.cornersContainer,
.widgetMode .cnMainContainerBottomCorners.cornersContainer
{
   /* change 424px to any desired value. It should be more then 400px to set some
space for margins/paddings */
width: 424px !important;
}

.widgetMode .cnPrimaryContentContainer
{
float: left;
}
```

Need more help?

- Check out our customization forums
- See our Partner directory to find a consultant

Customizing blogs using CSS

Customizing blogs using CSS

Advanced customization warning - Reference information is provided as is
Wild Apricot technical support team does not provide support for CSS customization, JavaScript, or theme overrides. (Read more)

Using CSS customizations , you can customize your blog pages and gadgets. To do so, hover over the **Website** menu and select the **CSS** option. From the screen that appears, enter or paste the appropriate code for your customization, then click **Save** to preview your customization within the preview area on the right. When you are finished making your changes, click **Cancel** to close the screen.

Removing the author's name

Using CSS code, you can remove the author's name from blog posts.

Removing the author's name from the blog gadget

To remove just the blog author's name from a blog gadget, use the following code:

```
.WaGadgetBlog .boxBodyInfoOuterContainer h5 .postedByLink{
display:none;
}
```

To remove both the blog author's name and the date and time of the post from a blog gadget, use the following code:

```
.boxInfoContainer h5
{ display: none;}
```

These customizations do not remove the name that appears for comments on blog posts.

Removing the name from the recent blog posts gadget

For Blueprint, Bookshelf, Clean Lines, Dark Impact, Firma, Homestead, Showcase, Skyline, Terra, Treehouse, Whiteboard, and White Space themes

To remove the blog author's name from the recent blog posts gadget, use the following code:

```
.WaGadgetRecentBlogPosts .gadgetStyleBody ul li .author {
 display: none;
}
```

For Fiesta themes, and the deprecated versions of Clean Lines, Dark Impact, Treehouse, and White Space themes

To remove the blog author's name from the recent blog posts gadget, use the following code:

```
.WaGadgetRecentBlogPosts .itemAuthor
{ display: none; }
```

For Transparent, Modern, Dark, Clouds, Classic, Basic, Notebook, Nature, Memo, Keynote, Granite, Glass, Business Casual, and Aurora *themes*

To remove the blog author's name – along with the blog date and time – from the recent blog posts gadget, use the following code:

```
div.itemInfoContainer
{ display: none; }
```

> This customization will also remove the author's name from the forum updates gadget for Transparent, Modern, Dark, Clouds, Classic, Basic, Notebook, Nature, Memo, Keynote, Granite, Glass, Business, and Aurora themes.

Removing administrator names from blog posts

To remove only the names of administrators as authors of blog posts, use the following code:

```
SPAN.postedByLink
{
  display: none
}
```

Removing (Administrator) designation from blog posts

When an administrator with a public profile posts a topic to a blog or forum, their name is followed by an *(Administrator)* designation.

Removing designation from blog topics list

You can remove this designation from the blog topics list using the following code:

```
.WaGadgetBlogStateList .boxBodyInfoContainer .postedByComment
{
display: none;
}
```

Removing designation from recent blog post gadgets

You can remove this designation from the recent blog posts gadget using the following code:

```
span.postedByComment
{
display: none
}
```

Removing the post date and time from the recent blog posts gadget

For Blueprint, Bookshelf, Clean Lines, Dark Impact, Firma, Homestead, Showcase, Skyline, Terra, Treehouse, Whiteboard, and White Space themes

To remove the blog date and time from the recent blog posts gadget, use the following code:

```
.WaGadgetRecentBlogPosts ul li .date
{ display: none; }
```

For Fiesta themes, and the deprecated versions of Clean Lines, Dark Impact, Treehouse, and White Space themes

To remove the blog date and time from the recent blog posts gadget, use the following code:

```
.WaGadgetRecentBlogPosts .date
{ display: none; }
```

Need more help?

- Check out our customization forums
- See our Partner directory to find a consultant

On this page:

See also:

- Entering CSS code

Customizing forums using CSS and JavaScript

Customizing forums using CSS and JavaScript

Advanced customization warning - Reference information is provided as is
Wild Apricot technical support team does not provide support for CSS customization, JavaScript, or theme overrides. (Read more)

You can customize your forum discussion pages and gadgets using CSS customizations and global JavaScript.

To add CSS customization, hover over the **Website** menu and select the **CSS** option. From the screen that appears, enter the appropriate code for your customization, then click **Save** to preview your customization within the preview area on the right. When you are finished making your changes, click **Cancel** to close the screen.

To add global JavaScript to your site, click the **Settings** menu then click **Global JavaScript** under **Site settings**. In the code box that appears, enter your JavaScript then click **Save**.

Removing the last update author

Using CSS code, you can remove the name of the author of the last update from discussion forums.

Removing the name from the forum topics page

To remove the author's name from the forum topics page, use the following code:

```
.WaGadgetForumStateTopicList td.lastReplyTD span
{
   display: none;
}
```

Removing the name from individual page topics

To remove the author's name from individual topic pages, use the following code:

```
.WaGadgetForumStateMessageList table.forumMessageTable td.left a
{
display:none;
}
```

Removing the name from the forum updates gadget

To remove the author's name from the forum updates gadget, use the following code:

```
.itemAuthor
{
  display: none;
}
```

> This customization will also remove the author's name from the recent blog posts gadget.

Removing the author and the date

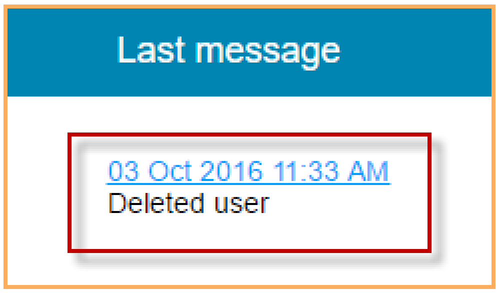
To remove both the author and the date of the forum post from the forum updates gadget, use the following CSS code:

```
div.itemInfoContainer
{
  display: none;
}
```

This customization will also remove the author and date from the recent blog posts gadget.

Changing the Deleted user label

When a contact is removed from your contact database, their forum posts will be attributed to *Deleted user*.



To change the *Deleted user* label within the forum topic list and forum summary gadgets, copy and paste the following code on the Global JavaScript screen:

```
<script type="text/javascript">
jq$(document).ready(function(){
 jq$('.WaGadgetForum .lastReplyAuthor').each( function() {
  var textNode = $(this);
  textNode.html(textNode.html().replace("Deleted user", "New label"));
 });
});
</script>
```

where *New label* is the label you want to appear in place of *Deleted user*.

To change the *Deleted user* label within forum topics, copy and paste the following code on the Global JavaScript screen:

```
<script type="text/javascript">
jq$(document).ready(function(){
 jq$('.WaGadgetForumStateMessageList table.forumMessageTable td.left
.boxBodyInfoContainer .inner').each( function() {
  var textNode = $(this);
  textNode.html(textNode.html().replace("Deleted user", "New label"));
 });
});
</script>
```

where *New label* is the label you want to appear in place of *Deleted user*.

Need more help?

- Check out our customization forums
- See our Partner directory to find a consultant

On this page:

Expand all sections

See also:

- Entering CSS code

Changing the page width

Changing the page width

The default width of the content area on Wild Apricot site pages is 1200 pixels on newer themes and is 960 pixels on older ones. Even when the width of browser is greater than 960 pixels, the content area does not expand. Instead, the site background fills the extra space.

Using CSS code, you can change the page width for all pages on your site.

To change the default page width, follow these steps:

1. Hover over the **Website** menu and click **CSS**.
2. In the **Editor** field, paste the following code:

    For Building Blocks and Tinted Tiles themes

    ```
    /* Code to change page width START */
    .WaPlaceHolder { max-width: 1200px; }
    /* Code to change page width END */
    ```

    For Blueprint, Bookshelf, Clean Lines, Dark Impact, Firma, Showcase, Skyline, Terra, Treehouse, Whiteboard, and White Space themes

```
/* Code to change page width START */
.container_12 {
    width: 1200px;
}
.s1_grid_12{
    width: auto;
}
@media only screen and (max-width: 1199px) and (min-width: 600px){
.container_12 {
    margin-left: auto;
    margin-right: auto;
    width: 100%;
    max-width: 1200px;
    min-width: 600px;
}}
@media only screen and (max-width: 616px){
.container_12 {
    margin-left: auto;
    margin-right: auto;
    width: 100%;
    max-width: 600px;
    min-width: 320px;
    display: block;
}}
/* Code to change page width END */
```

For Homestead and Fiesta themes

```
/* Code to change page width START */
.zoneInner, .zoneWrap, .zoneInner > .WaPlaceHolder { max-width: 1200px; }
/* Code to change page width END */
```

and change the *1200* value to whatever width you want. For Blueprint, Bookshelf, Clean lines, Dark impact, Firma, Showcase, Skyline, Terra, Treehouse, Whiteboard, and White space themes, you also have to change the *1199* value in *max-width: 1199px* to the width you want minus 1.

3. Click **Save** to save your changes.

Your site pages should now display their content across the width you specified.

Theme overrides

Theme overrides

This functionality is only intended for experienced web designers
Please read this page before you proceed: Advanced customization warning
Theme override is intended for people with advanced web design skills. Incorrect use may result in your website malfunctioning.
Note: our technical support team does not provide support related to theme overrides.

Using *theme overrides*, experienced web developers can customize existing Wild Apricot themes or create new ones. Theme overrides involve replacing or overriding theme files – the files that control the appearance and behavior of your current theme. Typically, your override files will include code to customize a feature or element of your theme.

The ability to apply theme overrides is not available for free plans. For more information, see Functionality by billing plan.

You can also customize the appearance and behavior of your Wild Apricot site in other ways:

- by choosing different settings from the Colors and styles screen
- by entering CSS code on the CSS customization screen
- by add custom JavaScript

You should consider using theme overrides only after exploring these other customization methods, since theme overrides require a solid understanding of HTML and the theme building process.

Glossary of terms

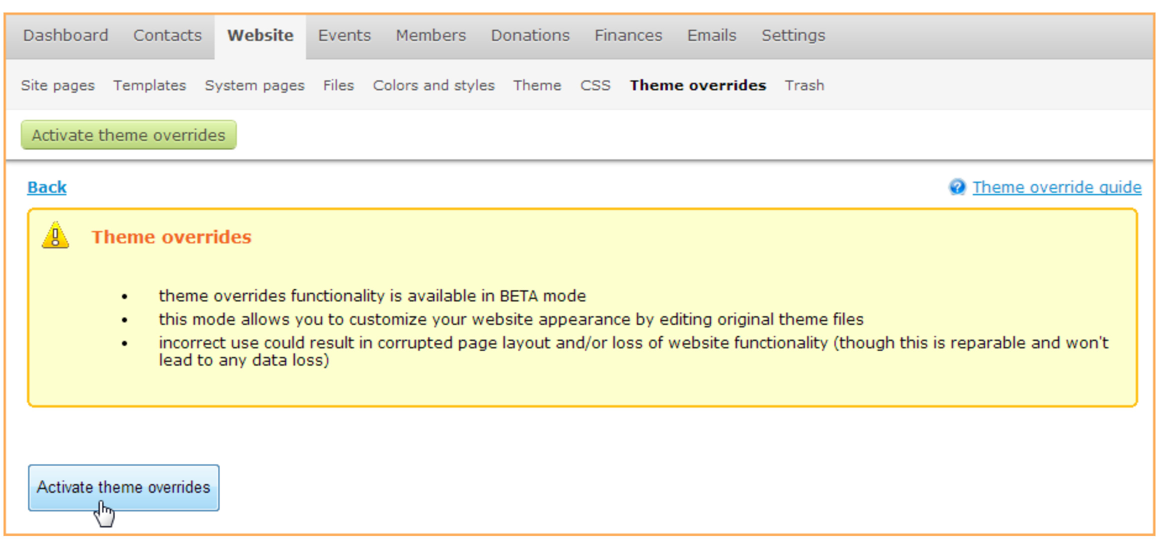
To better understand the theme override process, you need to become familiar with the following terms:

Term	Definition	For more info, see...
Theme	A set of files describing your site's look and feel	Website themes, Customizing theme elements
Theme assembly	The process in which theme files are assembled to render the theme	Theme generation process
Template engine	Scripting language for theme templates	Theme files language syntax
Master layout	A page outline, containing placeholders and graphical elements, to be used as the basis for theme-specific page templates	Master layouts, Customizing master layouts
Placeholder	A container in which gadgets and layouts can be dropped	Website themes, Customizing master layouts
Gadget	An element on a web page that displays content	Gadgets, Customizing theme gadgets
Control	Reusable code segment that performs a specific action	Customizing theme controls

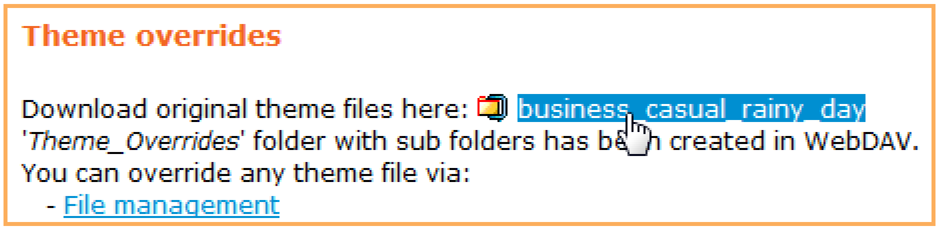
Activating theme overrides

To activate theme overrides, follow these steps:

1. Under the **Website** menu, click the **Theme overrides** option.
2. From the **Theme overrides** screen, click the **Activate theme overrides** button.



3. Click the link to download the theme files.



You can download the theme files (stored in a zip file) to any location you choose.

4. Unzip the theme files to a location of your choice on your computer or network.

Now that you have downloaded and unzipped the theme files, you can modify them and upload your changes to customize an existing theme, or make a copy of them to create a new theme.

Customizing vs creating a theme

There are two approaches to using theme overrides to customize your site: customizing an existing theme, and creating a new theme.

The simplest approach is to customize an existing theme. This is what happens by default when you enable theme overrides. For instructions, see Customizing theme files (below).

If you want to create theme from scratch, you can create a new folder in WebDav – or copy an existing theme structure – and start creating the theme. You can set the theme parent to one of our themes, or create a standalone theme.

Customizing theme files

Once theme overrides are enabled, a theme-specific folder is added to the Resources/Theme_Overrides folder on your site. The theme folder contains the same folder structure as the downloaded theme files, but the folders themselves are initially empty.

To customize your theme, follow these steps:

1. Modify the downloaded theme files on your computer. For instructions, see:
   - Customizing theme elements
   - Theme files language syntax
2. Upload the modified files to the corresponding theme folder on your site via File management or WebDAV. Your copied files will be loaded in place of the original theme files, thereby overriding the default theme appearance or behavior. For a list of theme folder names and their corresponding themes, see Theme folder names.
3. Click the **Rebuild theme** button on the **Theme overrides** screen.
4. If you've used theme overrides to customize gadget settings or create custom gadgets, you may need to log off and back on again to view these customizations.

> If you using theme overrides to customize an existing theme, rather than create a new one, do not modify MainConfig.cfg. Doing so may result in theme inheritance issues.

Theme override errors

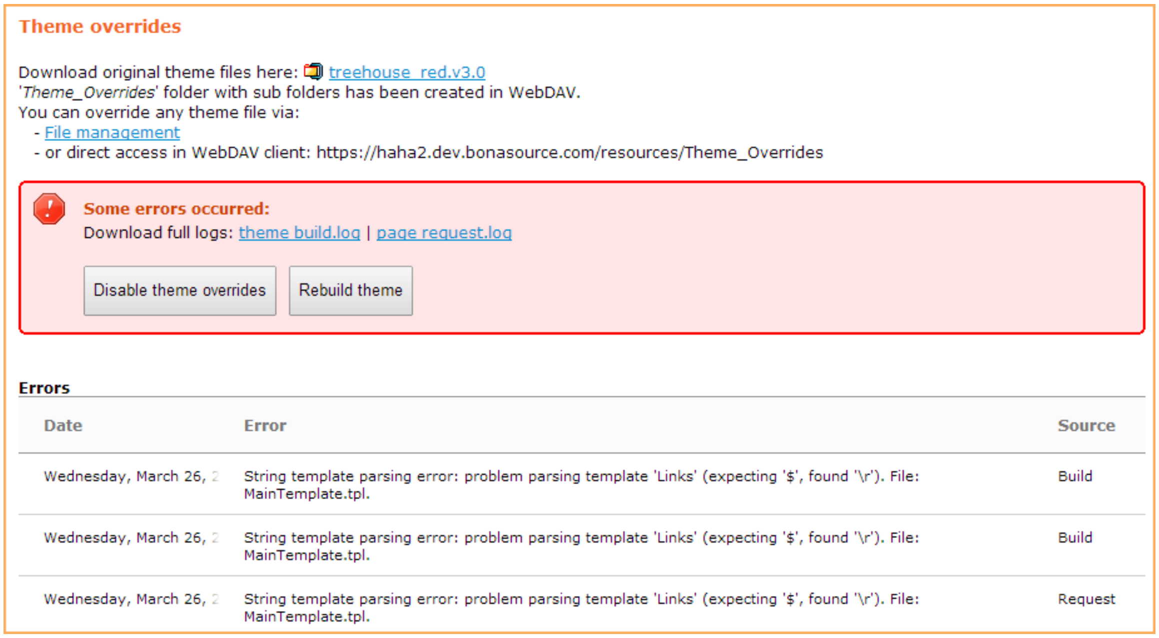
If your override files contain errors, your theme could malfunction, and the appearance and/or accessibility of your site may be affected.

All theme override errors will be logged in the Theme_Overrides\Log folder, accessible through WebDAV.

When a theme override occurs, you can correct the problem by logging in as an administrator and going to the **Theme overrides** screen.

> If the login box isn't available because of the site malfunction, you can login by adding **/sys/safelogin** to the end of your domain name. For example: http://www.example.com/sys/safelogin.

The Theme overrides screen will display a message for each error, with links to the error log files.



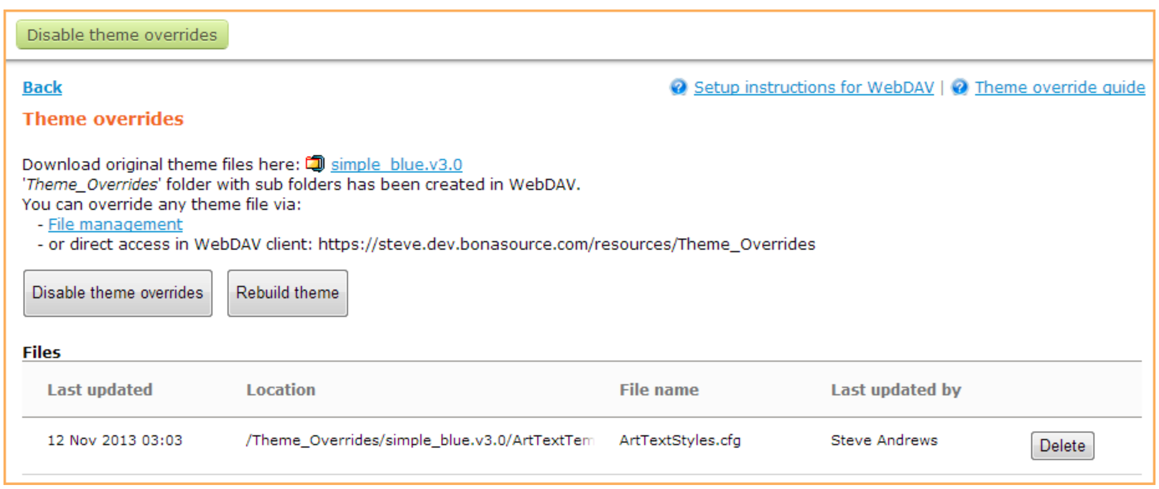
You can correct problems by deactivating theme overrides entirely, disabling individual overrides, or rebuilding the theme files.

Deactivating theme overrides

To deactivate theme overrides, click **Disable theme overrides**. The original theme settings will be restored.

Disabling individual overrides

The **Theme overrides** screen lists all override files currently in use on your site.



To disable an individual theme override, click the **Delete** button to the right of the override file name. This will delete the override file from your site, but not from the downloaded theme files on your computer or network.

Rebuilding theme files

Sometimes a theme file isn't compiled correctly, leading to a site malfunction. Clicking the **Rebuild theme** button will re-compile the override files. You should also rebuild the theme after uploading a theme override file.

On this page:

See also:

- Theme and page generation process
- Theme files language syntax
- Customizing theme elements
- Website themes
- CSS customization
- Customizing colors and styles

Advanced customization warning

Theme overrides is BETA functionality and is only intended for experienced web designers
PLEASE READ CAREFULLY BEFORE DOING ANY ADVANCED CUSTOMIZATION VIA THEME OVERRIDES

1. Theme overrides functionality in Wild Apricot allows **experienced web developers with advanced skills** to modify existing themes or create their own themes for Wild Apricot sites. It does this by replacing (overriding) various parts of HTML template of the site.
2. Customization examples and instructions are provided as is – **use at your own risk**. Incorrect use of this feature can result in corrupted site design, malfunctions in your website functionality, and might require manual and time-consuming cleanup of erroneous changes.
3. We **do not provide technical support related to advanced customization** (theme overrides or CSS customization).
4. Be **very careful** when modifying any of the template files (the .tpl files that contain HTML code with command directives) – no warnings are generated if you modify the file(s) incorrectly. Any mistakes – even spelling errors – can result in theme compilation errors, and the appearance and/or accessibility of your site may be affected. Theme override errors are logged in the Theme_Overrides\Log folder, and can be corrected through WebDAV or by deactivating theme overrides entirely, disabling individual overrides, or rebuilding the theme files.

Theme folder names

Theme folder names

When you enable theme overrides, a theme-specific folder is added to the Resources/Theme_Overrides folder on your account. You can upload and replace files in the theme folder and its subfolders to customize the appearance and behavior of the theme. The names of the folders and the themes to which they apply are listed below.

Theme sets	Theme	Theme folder	Theme parent
Blueprint	Waterfront	blueprint_waterfront.v3.0	theme.prototype.blueprint.v3.0
	Industrial Park	blueprint_industrial_park.v3.0	
	Financial District	blueprint_financial_district. v3.0	
Bookshelf	Almanac	bookshelf_almanac.v3.0	theme.prototype.bookshelf.v3.0
	Science Fiction	bookshelf_science_fiction.v3.0	
	Storybook	bookshelf_storybook.v3.0	
	Textbook	bookshelf_textbook.v3.0	
Business Casual	Coral Snake	business_casual_coral_snake.v2.0	theme.prototype.business_casual.v2.0
	Deep Blue	business_casual_deep_blue.v2.0	
	Rainy Day	business_casual_rainy_day.v2.0	
	Redwood	business_casual_redwood.v2.0	
	Wild Blue	business_casual_wild_blue.v2.0	

Building Blocks	Black Light Poster	building_blocks_black_light_poster.v3.0	theme.prototype.building_blocks.v3.0
	Black Light Wallpaper	building_blocks_black_light_wallpaper.v3.0	
	Board Game	building_blocks_board_game.v3.0	
	Duotone	building_blocks_duotone.v3.0	
Clean Lines	Blue Haze	clean_lines_blue_haze.v3.1	theme.prototype.simple.v3.1
	Green Night	clean_lines_green_night.v3.1	
	White Light	clean_lines_white_light.v3.1	
	Marine Green	clean_lines_marine_green.v3.1	
	Skyscape	clean_lines_skyscape.v3.1	
	Purple Twilight	clean_lines_purple_twilight.v3.1	
	Black&Salmon	clean_lines_black_and_salmon.v3.1	
	Pink Sky	clean_lines_pink_sky.v3.1	
	Blue Splash	clean_lines_blue_splash.v3.1	
	Yellow Reverse	clean_lines_yellow_reverse.v3.1	
Clean Lines (deprecated)	Blue Haze	simple_colored_blue.v3.0	theme.prototype.simple.v3.0
	Green Night	simple_colored_dark_green.v3.0	
	White Light	simple_colored_grass.v3.0	
	Marine Green	simple_colored_green.v3.0	
	Skyscape	simple_colored_ocean.v3.0	
	Purple Twilight	simple_colored_purple.v3.0	
	Black&Salmon	simple_colored_red.v3.0	
	Pink Sky	simple_colored_sunset.v3.0	
	Blue Splash	simple_colored_water.v3.0	
	Yellow Reverse	simple_colored_yellow.v3.0	
Dark Impact	Blue Moon	dark_impact_blue_moon.v3.1	theme.prototype.simple.v3.1
	Summer Garden	dark_impact_summer_garden.v3.1	
	Nightscape	dark_impact_nightscape.v3.1	
	Magenta Graphic	dark_impact_magenta_graphic.v3.1	
	Barnboard	dark_impact_barnboard.v3.1	
	Night Fire	dark_impact_night_fire.v3.1	
Dark Impact (deprecated)	Blue Moon	simple_dark_blue.v3.0	theme.prototype.simple.v3.0

	Summer Garden	simple_dark_green.v3.0	
	Nightscape	simple_dark_night_yellow.v3.0	
	Magenta Graphic	simple_dark_red.v3.0	
	Barnboard	simple_dark_wood.v3.0	
	Night Fire	simple_dark_yellow.v3.0	
Fiesta	Surf 'n' Turf	fiesta_surf_n_turf.v3.1	theme.prototype.fiesta.v3.1
	Garden Salad	fiesta_garden_salad.v3.1	
	Wild Rice	fiesta_wild_rice.v3.1	
Fiesta (deprecated)	Surf 'n' Turf	food_service_surf_n_turf.v3.0	theme.prototype.food_ service.v3.0
	Garden Salad	food_service_garden_salad.v3.0	
	Wild Rice	food_service_wild_rice.v3.0	
Firma	Above the Clouds	firma_above_the_clouds.v3.0	theme.prototype.firma .v3.0
	Berry Burst	firma_berry_burst.v3.0	
	Cherry Blossom	firma_cherry_blossom.v3.0	
	Cloud Burst	firma_cloud_burst.v3.0	
	Hawaiian Breeze	firma_hawaiian_breeze.v3.0	
	Lazy Harvest	firma_lazy_harvest.v3.0	
	Make a Wish	firma_make_a_wish.v3.0	
	Orange Grove	firma_orange_grove.v3.0	
	Rustic Deck	firma_rustic_deck.v3.0	
	Sandy Shore	firma_sandy_shore.v3.0	
	Stand Tall	firma_stand_tall.v3.0	
	Wheatfield	firma_wheatfield.v3.0	
Granite	Light	granite_light.v2.0	theme.prototype.granite.v2.0
	Black Galaxy	granite_black_galaxy.v2.0	
	Brownstone	granite_brownstone.v2.0	
	Firecracker	granite_firecracker.v2.0	
	Peacock Dust	granite_peacock_dust.v2.0	
	Starlight	granite_starlight.v2.0	
Homestead	Beechwood	homestead_beechwood.v3.0	theme.prototype.homestead.v3.0
	Country Lane	homestead_country_lane.v3.0	
	Painted Hills	homestead_painted_hills.v3.0	
	Roman Bricks	homestead_roman_bricks.v3.0	
Kaleidoscope	Cornucopia	kaleidoscope_cornucopia.v3.0	theme.prototype.kaleidoscope
	Jelly Bean	kaleidoscope_jelly_beans.v3.0	

	Mulberry Jam	kaleidoscope_mulberry_jam.v3.0	
	Muskoka	kaleidoscope_muskoka.v3.0	
	Neon	kaleidoscope_neon.v3.0	
	Overcast	kaleidoscope_overcast.v3.0	
	Redwood	kaleidoscope_redwood.v3.0	
	Wild Berries	kaleidoscope_wild_berries.v3.0	
Nature	Serenity	nature_serenity.v2.0	theme.prototype.nature.v2.0
	Bliss	nature_bliss.v2.0	
	Escape	nature_escape.v2.0	
	Green Vibes	nature_green_vibes.v2.0	
	Mellow	nature_mellow.v2.0	
	Reflect	nature_reflect.v2.0	
	Trails	nature_trails.v2.0	
	Tranquility	nature_tranquility.v2.0	
Showcase	Red	showcase_red.v3.0	theme.prototype.showcase.v3.0
	Teal	showcase_teal.v3.0	
	Blue	showcase_blue.v3.0	
	Purple	showcase_purple.v3.0	
	Crimson	showcase_crimson.v3.0	
	Green	showcase_green.v3.0	
	Orange	showcase_orange.v3.0	
Skyline	Downtown	skyline_downtown.v3.0	theme.prototype.skyline.v3.0
	Midtown	skyline_midtown.v3.0	
	Suburbia	skyline_suburbia.v3.0	
	Uptown	skyline_uptown.v3.0	
Terra	Alpine Adventure	terra_alpine_adventure.v3.0	theme.prototype.terra.v3.0
	Amber Creek	terra_amber_creek.v3.0	
	Evening's End	terra_evenings_end.v3.0	
	Field of Dreams	terra_fields_of_dreams.v3.0	
	Misty Mountain	terra_misty_mountain.v3.0	
	Morning Glory	terra_morning_glory.v3.0	
	Oyster Cove	terra_oyster_cove.v3.0	
	Painted Skies	terra_painted_skies.v3.0	
	Pebble Beach	terra_pebble_beach.v3.0	
	Rocky Lake	terra_rocky_lake.v3.0	

	Squirrel's Paradise	terra_squirrels_paradise.v3.0	
	Tropical Blue	terra_tropical_blue.v3.0	
Tinted tiles	Azure	tinted_tiles_azure.v3.0	theme.prototype.tinted_tiles.v3.0
	Cappuccino	tinted_tiles_cappuccino.v3.0	
	Partly Cloudy	tinted_tiles_partly_cloudy.v3.0	
	Skyfall	tinted_tiles_skyfall.v3.0	
Treehouse	Clean	treehouse2_clean.v3.1	theme.prototype.treehouse2.v3.1
	Dark Wood	treehouse2_dark_wood.v3.1	
	Light wood	treehouse2_light_wood.v3.1	
	Pink	treehouse2_pink.v3.1	
	Purple	treehouse2_purple.v3.1	
	Red	treehouse2_red.v3.1	
	Simple	treehouse2_simple.v3.1	
	Textile	treehouse2_textile.v3.1	
Treehouse (deprecated)	Clean	treehouse_clean.v3.0	theme.prototype.treehouse.v3.0
	Dark Wood	treehouse_dark_wood.v3.0	
	Light wood	treehouse_light_wood.v3.0	
	Pink	treehouse_pink.v3.0	
	Purple	treehouse_purple.v3.0	
	Red	treehouse_red.v3.0	
	Simple	treehouse_simple.v3.0	
	Textile	treehouse_textile.v3.0	
Whiteboard	Maya Blue	whiteboard_maya_blue.v3.0	theme.prototype.whiteboard.v3.0
	Knapsack Green	whiteboard_knapsack_green.v3.0	
	Lunchbag Brown	whiteboard_lunchbag_brown.v3.0	
White Space	Black&White	white_space_black_and_white.v3.1	theme.prototype.simple.v3.1
	Clear Light	white_space_clear_light.v3.1	
	Blue Accent	white_space_blue_accent.v3.1	
White Space (deprecated)	Black&White	simple_transparent_black.v3.0	theme.prototype.simple.v3.0
	Clear Light	simple_transparent_classic.v3.0	
	Blue Accent	simple_transparent_clean.v3.0	

Customizing theme elements

Customizing theme elements

This functionality is only intended for experienced web designers
Please read this page before you proceed: Advanced customization warning
Theme override is intended for people with advanced web design skills. Incorrect use may result in your website malfunctioning.
Note: our technical support team does not provide support related to theme overrides.

Theme overrides involve replacing or overriding theme files – the files that control the appearance and behavior of your current theme. For an overview of theme file structure, see below. For instructions on customizing specific theme elements, follow the links on the right.

Theme file structure

Theme files for all themes use the following folder structure. For information on how you can customize the theme files stored in these folders, click one of the links under **For more information** below.

Folder/File	Description	For more information, see...
ArtTextTemplates	Folder containing ArtText style files.	Customizing ArtText styles in themes
CMS	Folder containing files that define wrapper templates for the basic minimal building blocks for themes – custom layouts, layouts, placeholders, gadgets. Please do not modify these without deep understanding of what you are doing – it might lead to editing issues.	Customizing theme controls
Controls	Folder containing files that define the appearance and behavior of various controls, including Captcha, Divs, Form, FormHelpers, MessageBox, and StyledWrapers. Please do not modify these without deep understanding of what you are doing.	Customizing theme controls
Gadgets	Folder containing files defining the appearance and behavior of gadgets. To add new gadget to the system, you need to create a new folder within the Gadgets folder.	Customizing theme gadgets
BackgroundImages	Folder containing image and configuration files for theme backgrounds.	Customizing theme background options
Images	Folder containing images for the theme, including all the icons and images used on the sample pages (e.g. DefaultLogo.png).	
MasterLayouts	Folder containing the master layouts for the theme.	Customizing master layouts
PointAndClickSettings	Folder containing files defining the options and default values appearing on the Colors and Styles screen.	Customizing Colors and Styles options for themes
Scripts	Folder containing JavaScript files that are added to the PageModel.Scripts collection, which is referenced in Head.tpl and iterated in Links.tpl.	CSS, LESS, and JavaScript processing
Styles	Folder containing CSS and/or Less files defining the theme's HTML styles.	CSS, LESS, and JavaScript processing

SystemContentTemplates	Folder containing dummy template placeholders for gadgets without valid HTML templates. Please do not modify these without deep understanding of what you are doing.	
__SystemConfig.cfg	Stores the themeset name which current theme belongs to. Do not modify this file when customizing an existing theme.	Customizing other aspects of the theme
Colors.cfg	List of colors used in or compatible with the theme. These colors appear at top of the color window when setting text or background colors.	Customizing other aspects of the theme
DividerStyles.cfg	List of dividers for the theme.	Customizing other aspects of the theme
FontStyles.cfg	List of text styles that are available from the content editor.	Customizing other aspects of the theme
FormatStyles.cfg	List of paragraph styles that are available from the content editor.	Customizing other aspects of the theme
GadgetStyles.cfg	List of gadget styles. Does not apply to system gadgets or singular gadgets. If you want to add special styles or different set of styles for a specific gadget, you can add your own GadgetStyles.cfg to the appropriate gadget folder (within the Gadgets folder).	Customizing gadget styles in themes
Head.tpl	Common template called by MainTemplate.tpl.	Theme and page generation process
Links.tpl	Iterator template called from Head.tpl to process a collection of elements (e.g. a list of menu items).	Theme and page generation process
LinkStyles.cfg	Button styles for links.	
MainConfig.cfg	Main configuration file. Do not modify this file when customizing an existing theme.	Customizing main theme parameters
MainTemplate.tpl	Main theme template, and your site page's main entry point.	Theme and page generation process
preview.jpg	Theme preview image (348 x 312 pixels) appearing on theme selection screen. Its name can be changed in MainConfig.cfg.	Customizing main theme parameters
preview_thumb.jpg	Theme preview thumbnail (103 x 92 pixels) appearing on theme selection screen. Its name can be changed in MainConfig.cfg.	Customizing main theme parameters

Customizing master layouts

Customizing master layouts

This functionality is only intended for experienced web designers
Please read this page before you proceed: Advanced customization warning
Theme override is intended for people with advanced web design skills. Incorrect use may result in your website malfunctioning.
Note: our technical support team does not provide support related to theme overrides.

Master layouts are important building blocks in the construction of your Wild Apricot site. A website theme can contain multiple master layouts, each of which defines the broad outline of a page, and contain some of the graphical elements common to the theme. For example, you may have three master layouts in your system – one with a sidebar, header and footer, another with a header and footer but no sidebar, and one for landing pages, with nothing except a single content area. Master layouts form the basis for page templates, in the same way that page templates form the basis for pages.

Within a master layout – and consequently, within the page templates based on it – the areas in which content can be placed are defined by *p laceholders*. Placeholders are special areas that serve as containers into which gadgets and layouts can be dropped when editing a page template or page.

Defining master layouts

Master layouts are defined for each theme in the MasterLayouts/LayoutsConfig.cfg file. For each master layout, you can specify the name of the layout (as it will be displayed to administrators), the layout identifier for the page model, and a description of the master layout. You can also define which layout should be used as the default layout.

```
<Layouts>
  <DefaultLayoutId>LayoutMain</DefaultLayoutId>
  <Layout>
    <ID>LayoutMain</ID>
    <Title>Main Layout</Title>
    <Description></Description>
  </Layout>
  <Layout>
    <ID>LayoutPlain</ID>
    <Title>Plain layout</Title>
    <Description></Description>
  </Layout>
  <Layout>
    <ID>LayoutLegacy</ID>
    <Title>Legacy Layout</Title>
    <Description></Description>
  </Layout>
</Layouts>
```

In the example above, we have defined three layouts: main, plain and legacy, and set the main layout as the default.

Creating a new master layout

To create a new master layout, follow these steps:

1. Create a new master layout template file (.tpl) within the MasterLayouts folder.
2. Within the template file, define placeholder areas for gadgets and layouts. For instructions, see Defining placeholders (below).
3. Add a reference to the new master layout in LayoutsTemplate.tpl.
4. Add a reference to the new master layout in LayoutsConfig.cfg.
5. If needed, add placeholder settings to be displayed on the Colors & Styles screen (see Customizing Colors and Styles options for themes).

Modifying an existing master layout

To modify an existing master layout, follow these steps:

1. Find the name of the master layout you want to modify. You can view a list of master layouts when modifying page template settings.
2. In the LayoutsConfig.cfg file, find the ID for the master layout.
3. In the LayoutsTemplate.tpl file, find the <$if ... $> for your master layout and note the name of the .tpl file.
4. Open the appropriate .tpl file and make the required changes.

Defining placeholders

Placeholders are the areas in the which gadgets and layouts can be dropped when editing a page or page template. In master layout files, placeholders are defined using the following format.

```
<$Area Name="AreaName" ClientId="areaClientId" ClassName="areaClassName"$>
```

For example, in your MasterLayouts/LayoutLegacy.tpl file you might use a string like this:

```
<$Area Name="Footer" ClientId="idFooterContentHolder" ClassName="footerContentHolder
cnFooterContentHolder"$>
```

This will define a placeholder area – a special DIV structure recognized by Wild Apricot – with the name **Footer**, an ID of **idFooterContentHolder**, and classes of **footerContentHolder cnFooterContentHolder**. You can access the DIV later from your CSS by ID or using the specified classnames.

Using master layouts

The currently selected master layout is defined in the main theme template file – MainTemplate.tpl – using the special <$MASTER_LAYOUT$> directive. When the template engine encounters the <$MASTER_LAYOUT$> entry, it loads MasterLayouts/LayoutsTemplate.tpl.

The currently selected layout is passed to the current page's page model as <$PageModel.Layout.LayoutName$> and parsed in LayoutsTemplate.tpl, as follows:

```
<$if (PageModel.Layout.LayoutMain)$>
 <$MasterLayouts/LayoutMain()$>
<$endif$>

<$if (PageModel.Layout.LayoutLegacy)$>
 <$MasterLayouts/LayoutLegacy()$>
<$endif$>

<$if (PageModel.Layout.LayoutPlain)$>
    <$MasterLayouts/LayoutPlain()$>
<$endif$>

<$if (PageModel.Layout.LayoutSecondary)$>
    <$MasterLayouts/LayoutSecondary()$>
<$endif$>
```

In the code above, the system checks all possible PageModel.Layout.LayoutNames and loads the template file for this specific selected layout. For example, if PageModel.Layout.LayoutLegacy is validated as true, the template engine loads the MasterLayouts/LayoutLegacy.tpl file.

On this page:

Customizing theme gadgets

Customizing theme gadgets

This functionality is only intended for experienced web designers
Please read this page before you proceed: Advanced customization warning

Theme override is intended for people with advanced web design skills. Incorrect use may result in your website malfunctioning. Note: our technical support team does not provide support related to theme overrides.

Gadgets are elements used to display content on Wild Apricot site pages. Gadgets can be used to display page components such as login boxes, menus, forum updates, and membership registration forms, among many others. The appearance of gadgets will vary depending on the website theme, as will the gadget style options.

Gadgets, like controls and master layouts, are rendered using a combination of HTML and StringTemplate, a Java template engine.

Once you enable theme overrides and download the theme files, you'll find a **Gadgets** folder, containing files that control the behavior of the gadgets used in the theme.

Individual gadget configuration files

For each system gadget, there is a separate subfolder under Gadgets containing several files, including the following:

File	Description
MainConfig.cfg	Gadget configuration file.
GadgetTemplate.tpl	Gadget template file. This file provides the actual code for the gadget. You can modify this file to change how the gadget functions.

MainConfig.cfg is the main configuration file for your gadget. In it, you can set the following parameters:

Parameter	Description
Title	Full name of the gadget.
ShortTitle	Short name of the gadget.
Module	Name of the module providing the data to the gadget.
Description	Description of the gadget.
Icon	Icon to be displayed in gadget selection screen.
IconSmall	Small icon to be displayed in gadget selection screen.
Dedication	Type of gadget.
Classname	Class name to be added to gadget outer HTML.

Creating a new gadget

To create a new gadget, follow these steps:

1. Create a folder under the Gadgets folder.
2. Create MainConfig.cfg and GadgetTemplate.tpl files.
3. If you want, you can add gadget style settings to appear on the Colors & styles screen. For more information, see Customizing Colors and Styles options for themes.

Gadgets and modules

Gadgets can use modules. Modules provide additional data to be used by the gadget. For example, if you're creating photo album gadget, you'll need a collection of links to photos and thumbnails. If you're creating a login form gadget, you'll need the form URL to send login data to.

See also Adding parameters to gadgets to learn how to add and use parameters in your gadget.

On this page:

- Creating a new gadget
- Gadgets and modules

Adding parameters to gadgets

Adding parameters to gadgets

You can add parameters to a new or existing gadget so an administrator can set them from the gadget settings window in admin view. For example, you might want an administrator to set the maximum height of your gadget.

There are two files in the gadget folder responsible for managing the gadget parameters: Settings.cfg and SettingsLayout.cfg. The SettingsLayout.cfg file controls which options appear in admin view.

Let's take a look at the SettingsLayout.cfg file for the slideshow gadget.

```
<SettingsLayout>
    <Section title="General">
        <Control settingName="ImageSource" />
        <Control settingName="GalleryLayout">
            <ControlItem value="FixedHeight">
                <Control settingName="LayoutFixedHeight" postfix="px"
controlContainerDisplayType="fixed" />
            </ControlItem>

        </Control>
        <Control settingName="FitImage" />
    </Section>
    <Section title="Slideshow controls">
        <Control settingName="DisplayImage" title="Display image for:"
titlePosition="Left" titleWidth="120" postfix="sec"
controlContainerDisplayType="fixed" />
        <Control settingName="TransitionTime" title="Transition time:"
titlePosition="Left" titleWidth="120" postfix="ms"
controlContainerDisplayType="fixed" />
        <Control settingName="TransitionEffect" type="DropDownList"
title="Transition effect:" titlePosition="Left" titleWidth="120" />
        <Control settingName="AllowUserManuallyNavigate" />
    </Section>
    <Section title="Appearance">
        <Style>
            <Margin />
        </Style>
    </Section>
    <Section title="Advanced" isCollapsible="true" isCollapsed="true">
        <UnencodedText>Use CSS to fine-tune appearance and behavior.
            &lt;a
href=&quot;http://help.wildapricot.com/display/DOC/Gadgets#Gadgets-HTMLandCSSparamet
ers/

?utm_source=contexthelp&amp;utm_medium=site&amp;utm_campaign=contexthelp&quot;
target=&quot;_blank&quot; &gt;Learn more&lt;/a&gt;
        </UnencodedText>
        <Control settingName="ClientId"/>
        <Control settingName="CustomClassName"/>
        <Control settingName="InlineStyle"/>
    </Section>
</SettingsLayout>
```

Let's look at how this file is structured.

Defining parameter sections

The top level is the root placeholder.

```
<SettingsLayout>
...
</SettingsLayout>
```

The levels below define individual parameter sections.

```
<Section>
...
</Section>
```

You can make your section collapsible by adding a isCollapsible attribute.

```
<Section title="Section Title" isCollapsible="true">
```

If you want your collapsible section to be collapsed by default, add the isCollapsed attribute as well:

```
<Section title="Section Title" isCollapsible="true" isCollapsed="true">
```

Controls referencing

A control is the endpoint setting for a gadget layout. Controls reside in sections. Some of controls are gadget-specific and hardcoded into the gadget logic, but most of them are easily modifiable and configurable.

Let's take a look at the content of the first ("General") section:

```
<Section title="General">
  <Control settingName="ImageSource" />
  <Control settingName="GalleryLayout" />
  <Control settingName="FitImage" />
</Section>
```

You can see some control entities inside the section. They define what controls you'll see, but not their data types.

> Generally, we place controls in desired order in SettingsLayout.cfg and define their behavior, values, and properties in Settings.cfg.

For user-defined control references, you also should define a name which describes the control, to be shown near it, for example:

```
<Control settingName="MySetting" title="Check to enable extra coolness" />
```

Defining control data types

The Settings.cfg file is where you define control data types. Each control entity describes one element of following types:

- string input
- number input
- Boolean
- size (in CSS-compatible format)

- offset (in CSS-compatible format)
- background (in CSS-compatible format)
- list of pre-defined values
- common built-in control types
- gadget-specific built-in control types

The basic syntax for describing control behavior is:

```
<Setting name="SettingName" type="[string | boolean | number | cssSize | cssoffset |
background ]" />
```

Where **name** property is the same as **settingName** in SettingsLayout.cfg.

For radio buttons and dropdown lists, the syntax is slightly different:

```
<Setting name="SettingName" type="list">

    <Item value="val1" title="Value 1" />
    <Item value="val2" title="This is Value 2" />

    ...
</Setting>
```

For full set of parameters, see Gadget setting attributes.
Using parameters in gadget templates

To use parameters in your gadget, add a reference to <$Model.SettingName$> in your GadgetTemplate.tpl (where *SettingName* is the name of the setting).

Here's example from the slideshow gadget's GadgetTemplate.tpl. It uses gadget settings to initialize the slideshow's JavaScript with parameters from the gadget:

```
<script language="javascript">
 jq$(function(){

  jq$('#camera_wrap_<$Model.ComponentId$>').camera
  (
    {
   componentId: '<$Model.ComponentId$>',
   thumbnails: true,
   loader: 'pie',
   fx: '<$(Model.Settings.TransitionEffect)$>',
   time: (<$Model.Settings.DisplayImage$>*1000),
   transPeriod: (<$Model.Settings.TransitionTime$>),
   portrait: <$if(Model.Settings.FitImage)$>false<$else$>true<$endif$>,
   playPause: false,
   pauseOnClick: false,
   thumbnails: <$Model.Settings.AllowUserManuallyNavigate$>,
   pagination: <$Model.Settings.AllowUserManuallyNavigate$>,
   navigation: <$Model.Settings.AllowUserManuallyNavigate$>,
   height: <$if (Model.Settings.GalleryLayout=="Landscape")$>'56%'<$endif$>
     <$if (Model.Settings.GalleryLayout=="Portrait")$>'133.3%'<$endif$>
     <$if (Model.Settings.GalleryLayout=="Square")$>'100%'<$endif$>
     <$if
(Model.Settings.GalleryLayout=="FixedHeight")$>'<$Model.Settings.LayoutFixedHeight$>
px'<$endif$>
    }
  );
 });
</script>
```

Using built-in controls

There are some predefined controls that you can reference in SettingsLayout.cfg without describing them Settings.cfg.

> If you see a control placeholder in SettingsLayout.cfg, but no corresponding reference in Settings.cfg, it means that it is either a built-in control or a gadget-specific control.

The following are built-in controls:

Control name	Description
ClientID	Gadget ID
CustomClassName	Gadget class name
InlineStyle	Inline CSS style
Style	Renders the Style dropdown

Gadget-specific controls

The first control in the SettingsLayout.cfg file for the slideshow gadget asks for the image source.

```
<Control settingName="ImageSource" />
```

There is no definition for this parameter in the Settings.cfg file, but it is not a built-in control. Instead, it is a gadget-specific control that is rendered and processed by the gadget server code. Since it is a gadget-specific control, it has a special settingName – ImageSource – that is recognized and processed by Wild Apricot.

On this page:

Customizing gadget styles in themes

Customizing gadget styles in themes

Gadget styles can be applied to gadgets to change their appearance. The gadget style will determine the color and format of the gadget title, the gadget content, and the gadget border.

Styles are not supported for all gadgets out of the box. To add styles to a gadget, follow these steps:

1. Modify the GadgetStyles.cfg file, adding names and values for each gadget style.

```
<GadgetStyles>
  <Style Name="None" Value="gadgetStyle000" />
  <Style Name="Theme style 1" Value="gadgetStyle001" />
  <Style Name="Theme style 2" Value="gadgetStyle002" />
  <Style Name="Theme style 3" Value="gadgetStyle003" />
</GadgetStyles>
```

2. Add a style selection control to SettingsLayout.cfg for the gadget using the following code:

```
<Control settingName="Style"/>
```

   For more information on parameterizing gadgets, see Adding parameters to gadgets.
3. Parse this parameter and use in your gadget's template (GadgetTemplate.tpl). For example, form a CSS class from it as we do in the StyledWrapper control (see Customizing theme controls):

```
<div class="artBoxContainer artBoxContainerType-<$Model.Appearance.StyleValue$>">
```

Adding settings to gadgets

Adding settings to gadgets

You can add settings to gadgets that will be appear along with the other gadget settings when editing a page or page template. Examples of additional settings appear below. The same approach can be taken to add other settings to other gadgets.

- Adding settings to breadcrumbs gadget
- Adding settings to login form gadget

Adding settings to breadcrumbs gadget

Adding settings to breadcrumbs gadget

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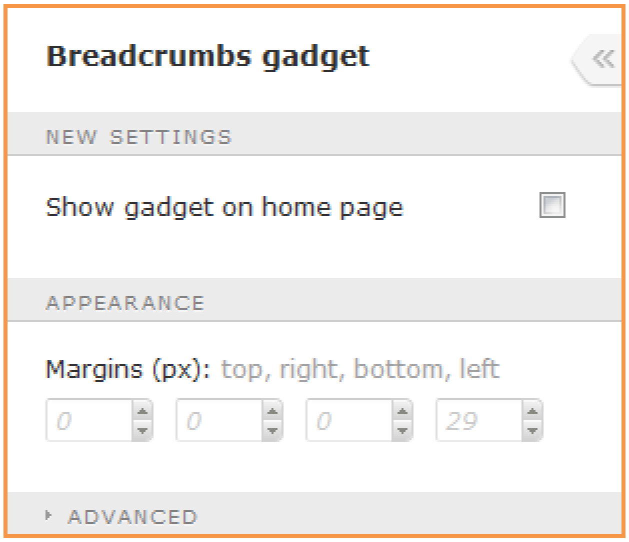
You can add properties to the breadcrumbs gadget to allow you to control additional aspects of its behavior while editing a page or page template. For example, you might want to add an option to hide the breadcrumbs gadget when on the home page.



You can use this same approach to add other settings to other gadgets.

To add settings to a breadcrumbs gadget, follow these steps:

1. Enable theme overrides and download the theme files.
2. We'll create a new version of the gadget, preserving the original version, just in case. Under the /Gadgets folder within the downloaded theme files, create a BreadCrumbsAlternative folder.
3. Copy all content from the /Gadgets/BreadCrumbs folder to the new /Gadgets/BreadCrumbsAlternative folder.
4. Open the /Gadgets/BreadCrumbsAlternative/MainConfig.cfg file and edit the gadget description, so we can easily tell the difference between normal and alternative gadgets. The file should now look something like this:

```
<Gadget>
  <Title>Breadcrumbs Alternative</Title>
  <ShortTitle></ShortTitle>
  <Description>Current location within the menu hierarchy - alternative
version</Description>
  <Icon>BreadCrumbsIcon.png</Icon>
  <IconSmall>BreadCrumbsIconSmall.png</IconSmall>
  <Module>BreadCrumbsModule</Module>
  <ClassName>WaGadgetBreadcrumbs</ClassName>
  <Dedication>Navigational</Dedication>
</Gadget>
```

5. Next, let's add the new setting to the gadget settings layout config file. Open SettingsLayout.cfg within the /Gadgets/BreadCrumbsAlternative folder, then add – before all other sections under <SettingsLayout> – the following section:

```
<Section title="New Settings">
        <Control settingName="ShowOnHome"  title="Show gadget on home page"
titlePosition="Left" titleWidth="247"/>
</Section>
```

   Here, we define the ShowOnHome field and set its alignment, title, and the title's width.
6. Now, its time to define the new setting type. To do so, we'll create a Settings.cfg file within the Gadgets/BreadCrumbsAlternative folder

consisting of the following code:

```
<Settings>
 <Setting name="ShowOnHome" type="boolean" defaultValue="true"
initialValue="true" width="20"/>
</Settings>
```

Here, we define ShowOnHome as boolean (it can be true or false and graphically represented by a checkbox), set its default value and initial value, and specify the width of its checkbox. Note we use the same names as in SettingsLayout.cfg.

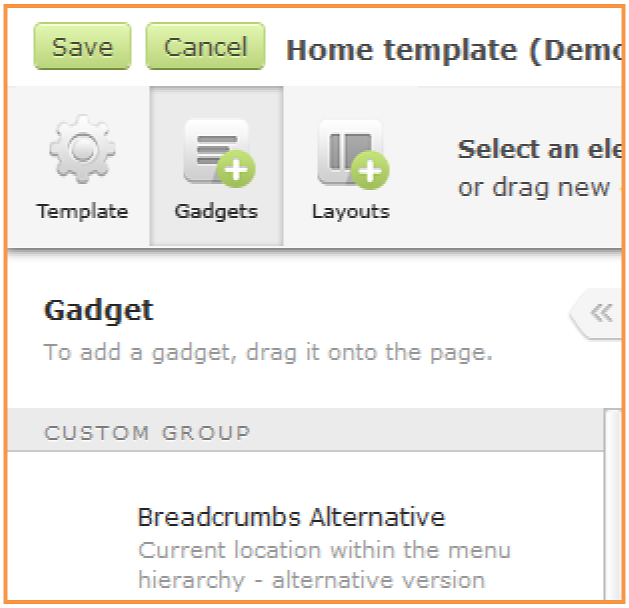
7. Next, we need to connect the setting to the gadget's HTML code. To do so, open GadgetTemplate.tpl within the Gadgets/BreadCrumbsAlternative folder for editing.
8. All elements for building a chain of breadcrumb links are stored in Model.Items collection. If we have only one item in a collection, it means that we're at root level – the home page – and we can check the option we added to the gadget settings. We should render items only if item is *not* the only one in the items collection, or if it *is* the only item *but* the **Show on home page** option is checked. We'll add this condition checking in the beginning of our iterator cycle, so that the entire gadget code will look like this::

```
<$control.StyledWrappers(GadgetBegin
 = "true", GadgetTitleBegin = "true", GadgetTitleText =
Model.Appearance.Title, GadgetTitleEnd = "true",  GadgetBodyBegin =
"true")$>
<ul>
    <$Model.Items:{
        <$if (!it.IsSingleItem || Model.Settings.ShowOnHome)$>
            <$if (!it.IsLastItem)$>
                <li><a href="<$it.Url$>"><$it.Title$></a></li>
            <$endif$>

            <$if (it.IsLastItem)$>
                <li class="last"><$it.Title$></li>
            <$endif$>
        <$endif$>
    }$>
</ul>
<$control.StyledWrappers(GadgetBodyEnd = "true", GadgetEnd = "true")$>
```

9. Save the changes you have made to the GadgetTemplate.tpl file.
10. Upload all new and modified files and folders to the appropriate folder under the Theme_Overrides folder on your site via File management or WebDAV.
11. Return to the Theme overrides screen and rebuild the theme.

You can now open a page for editing and find the new gadget in the gadgets list under Custom Group.



After dragging the gadget to the page, you can modify the new gadget settings.

Adding settings to login form gadget

Adding settings to login form gadget

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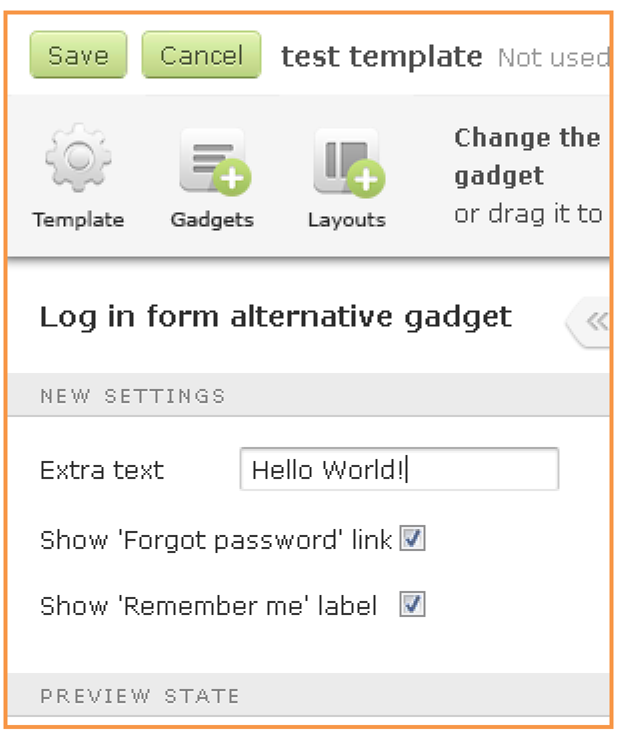
You can add properties to the login form gadget to allow you to control additional aspects of its behavior while editing a page or page template. For example, you might want to hide the **Forgot password** link or the **Remember me** checkbox. You might also want to allow an administrator to add some explanatory text to the gadget through its settings.



You can use this same approach to add other settings to other gadgets.

To add settings to a login form gadget, follow these steps:

1. Enable theme overrides and download the theme files.
2. We'll create a new version of the gadget, preserving the original version, just in case. Under the /Gadgets folder within the downloaded theme files, create a Login.LoginFormAlternative folder.
3. Copy all content from the /Gadgets/Login.LoginForm folder to the new /Gadgets/Login.LoginFormAlternative folder.
4. Open the /Gadgets/Login.LoginFormAlternative/MainConfig.cfg and edit the gadget description, so we can easily tell the difference between normal and alternative gadgets. The file should now look something like this:

```
<Gadget>
  <Title>Log in form alternative</Title>
  <ShortTitle></ShortTitle>
  <Description>Controls to log in or out, reset password, and view profile.
Alternative version!</Description>
  <Module>LoginModule</Module>
  <ClassName>WaGadgetLoginForm</ClassName>
  <Dedication>Login</Dedication>
  <Icon>LoginBoxIcon.png</Icon>
  <IconSmall>LoginBoxIconSmall.png</IconSmall>
</Gadget>
```

5. Next, let's add the new settings to the gadget settings layout config file. Open the SettingsLayout.cfg file within the /Gadgets/Login.LoginFormAlternative folder, then add – before all other sections under <SettingsLayout> – the following section:

```
<Section title="New Settings">
       <Control settingName="ExtraText" title="Extra text" titlePosition="Left"/>
        <Control settingName="ShowForgotPassword"  title="Show 'Forgot password'
link" titlePosition="Left" titleWidth="247"/>
        <Control settingName="ShowRememberMe" title="Show 'Remember me' label"
titlePosition="Left" titleWidth="247"/>
</Section>
```

   Here we define three new settings: ExtraText, ShowForgotPassword and ShowRememberMe. We also set text labels for the fields, and align them and set their display width.
6. Now, its time to define the new setting types. To do so, we'll open Settings.cfg within the /Gadgets/Login.LoginFormAlternative folder and add these three lines anywhere under <Settings>:

```
<Setting name="ExtraText" type="string" />
<Setting name="ShowForgotPassword" type="boolean" defaultValue="true"
initialValue="true" width="20"/>
<Setting name="ShowRememberMe" type="boolean"  defaultValue="true"
initialValue="true" width="20"/>
```

   Here, we define that ExtraText is a string, and ShowForgotPassword and ShowRememberMe are boolean. We also set default values for the booleans (showing **Forget password** and **Remember me** by default) and set the width of the checkboxes. Note we use the same names as in SettingsLayout.cfg.
7. Next, we need to connect the settings to the gadget's HTML code. To do so, open GadgetTemplate.tpl within /Gadgets/Login.LoginFormAlternative for editing.
8. Find the beginning of the not-logged-in mode code (which may vary depending on gadget's version) and insert this code:

```
<$if (Model.Settings.ExtraText)$><div><$Model.Settings.ExtraText$></div><$endif$>
```

This will check if ExtraText is set, and if yes, will render a DIV tag containing the text entered in the gadget settings.

9. Now, find the place where the **Forgot password** link is displayed and surround it with an IF statement to check if ShowForgotPassword is set to true, and if yes, show the link. The code should appear something like this:

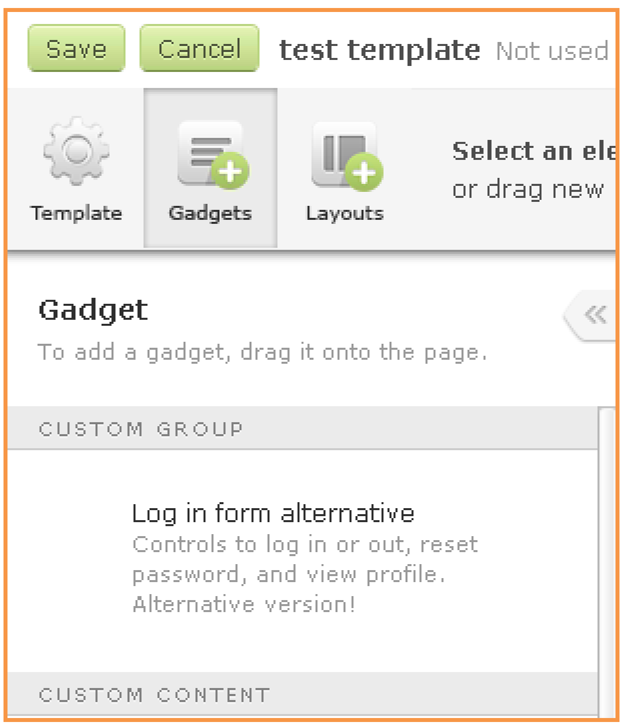
```
<$if (Model.Settings.ShowForgotPassword)$>
    <div class="loginPasswordForgot">
        <a
href="<$Model.Urls.ForgotPassword$>"><$Model.Text.LinkForgotPasswordText$></a>
    </div>
<$endif$>
```

10. Next, find the place where the **Remember me** option is displayed and surround it with an IF statement to check if ShowRememberMe is set to true, and if yes, to show the **Remember me** text and checkbox. The code should appear something like this:

```
<$if (Model.Settings.ShowRememberMe)$>
    <div class="loginActionRememberMe">
        <input id="<$Model.Id$>_rememberMe" type="checkbox" name="rememberMe"
tabindex="3"
             class="rememberMeCheckboxControl"/><label
for="<$Model.Id$>_rememberMe"><$Model.Text.LabelRemember$></label>
    </div>
<$endif$>
```

11. Save your changes to GadgetTemplate.tpl.
12. Upload all new and modified files and folders to the appropriate folder under the Theme_Overrides folder on your site via File management or WebDAV.
13. Return to the Theme overrides screen and rebuild the theme.

You can now open a page for editing and find the new gadget in the gadgets list under Custom Group.



After dragging the gadget to the page, you can modify the new gadget settings.

Customizing theme controls

Customizing theme controls

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Controls are small reusable chunks of code that perform a specific action – usually, to render a piece of HTML. Wild Apricot uses controls mainly for wrapping gadgets in styled containers. Thus we achieve a form of separation – controls define gadget appearance, and gadgets themselves define their functionality.

You can call controls from gadgets and master layout templates.

Control types

In Wild Apricot, we use the following types of controls:

- Captcha – HTML to render Captchas
- Divs – wrapper DIVS used in old themes
- Form – form wrapper
- FormHelpers – helper for rendering standard form elements
- MessageBox – wrapper for message boxes used in our system
- StyledWrappers – wrappers for gadget styles (see Customizing gadget styles in themes for more details)

Calling controls

The basic syntax for calling controls is:

```
<$control.ControlName(param = "val")$>
```

Please note that you pass parameters to controls in the same way as you pass parameters to gadgets. For more information, see Passing parameters.

Creating controls

To create a control, follow these steps:

1. Create a folder under the Controls folders.
2. Create a ControlTemplate.tpl file in the new subfolder (from scratch or by copying an existing file from another Controls subfolder).
3. Modify the ControlTemplate.tpl file.

On this page:

Customizing main theme parameters

Customizing main theme parameters

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The MainConfig.cfg file is stored at the root of your theme directory. It is the main configuration file of your theme, and stores identifying information about your theme. It uses the following structure:

```
<?xml version="1.0"?>
<Theme>
  <ParentId>theme.prototype.main.v1.0</ParentId>
  <Title>Clouds Orange</Title>
  <ShortTitle>Orange</ShortTitle>
</Theme>
```

Once you enable theme overrides, you can modify the following parameters:

Parameter	Description
ParentId	ID of the parent theme (e.g. theme.prototype.nature.v2.0).
Title	The full title of the theme including theme set name (e.g. Nature Serenity).
ShortTitle	The name of the theme (e.g. Serenity)

Do not modify this file if you are extending an existing theme, rather than creating a new one.

Customizing theme background options

Customizing theme background options

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You can select background images for placeholders, layouts, and content gadgets when editing them from the Site pages screen. You can also set a site background from the Colors & styles screen. When selecting a background image, you can choose from the theme-specific image library, or choose an image file from your Wild Apricot account.

The images that are available from your theme-specific image library are controlled by the HeaderBackgroundSettings.cfg file. Here's a sample HeaderBackgroundSettings.cfg file:

```
<?xml version="1.0"?>
<HeaderBackgroundsConfiguration>
  <HeaderBackgrounds>
    <Background fileName="ThemeSharedRes/HeaderBackgroundImages/Set-22-11.jpg"/>
    <Background
fileName="ThemeSharedRes/HeaderBackgroundImages/Header-2009---24-12.jpg"/>
    <Background
fileName="ThemeSharedRes/HeaderBackgroundImages/Header-2009---12-12.jpg"/>
    <Background
fileName="ThemeSharedRes/HeaderBackgroundImages/Header-2009---09-12.jpg"/>
    <Background fileName="ThemeSharedRes/HeaderBackgroundImages/Set-01-03.jpg"/>
    <Background fileName="ThemeSharedRes/HeaderBackgroundImages/Set-02-03.jpg"/>
    <Background fileName="ThemeSharedRes/HeaderBackgroundImages/Set-04-03.jpg"/>
    <Background fileName="ThemeSharedRes/HeaderBackgroundImages/Set-05-03.gif"/>
    <Background fileName="ThemeSharedRes/HeaderBackgroundImages/Set-06-03.jpg"/>
    <Background fileName="ThemeSharedRes/HeaderBackgroundImages/Set-07-03.gif"/>
    <Background fileName="ThemeSharedRes/HeaderBackgroundImages/Set-08-03.jpg"/>
    <Background fileName="ThemeSharedRes/HeaderBackgroundImages/Set-09-03.jpg"/>
    <Background fileName="ThemeSharedRes/HeaderBackgroundImages/Set-10-04.jpg"/>
    <Background fileName="ThemeSharedRes/HeaderBackgroundImages/Set-11-03.jpg"/>
    <Background fileName="ThemeSharedRes/HeaderBackgroundImages/Set-12-03.jpg"/>
    <Background fileName="ThemeSharedRes/HeaderBackgroundImages/Set-15-03.jpg"/>
  </HeaderBackgrounds>
</HeaderBackgroundsConfiguration>
```

As you see, the file consists of links to background images. To add your own images, you can either edit this file directly, or just add your image files to the **BackgroundImages** folder and background image thumbnails with the same name to the **BackgroundImages/thumbs** folder. The recommended size for thumbnail image is 300 x 49 pixels. After theme is rebuilt, your HeaderBackgroundSettings.cfg file will be updated automatically with the new files.

Customizing ArtText styles in themes

Customizing ArtText styles in themes

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ArtText styles allow you to create fancy text headings with special effects like 3D and drop shadows. Using theme overrides, you can customize the available ArtText styles for a particular theme.

Once you enable theme overrides and download the theme files, you'll find an ArtTextTemplates folder containing an ArtTextStyles.cfg file and various other .cfg files. The ArtTextStyles.cfg is the main ArtText configuration file, and it defines the available ArtText styles using <ArtTextStyle> tags.

In the following example, there are two styles defined: Page header 1 and Site subtitle 1.

```
<ArtTextStyles>
 <ArtTextStyle name="Page header 1">
   <XmlTemplateFilePath>Page-Header-01.cfg</XmlTemplateFilePath>
   <StyleGroup>H1</StyleGroup>
   <CustomizableParameters>
 <PropertyName>TextForeColor1</PropertyName>
 <PropertyName>TextForeColor2</PropertyName>
 <PropertyName>FontName</PropertyName>
 <PropertyName>FontSize</PropertyName>
   </CustomizableParameters>
 </ArtTextStyle>
 <ArtTextStyle name="Site subtitle 1">
   <XmlTemplateFilePath>Site-Subtitle-01.cfg</XmlTemplateFilePath>
   <StyleGroup>SubTitle</StyleGroup>
   <CustomizableParameters>
 <PropertyName>TextForeColor1</PropertyName>
 <PropertyName>TextForeColor2</PropertyName>
 <PropertyName>StrokeColor1</PropertyName>
 <PropertyName>StrokeColor2</PropertyName>
 <PropertyName>FontName</PropertyName>
 <PropertyName>FontSize</PropertyName>
   </CustomizableParameters>
 </ArtTextStyle>
  </ArtTextStyles>
```

For each style, ArtTextStyles.cfg points to the.cfg files containing the definitions for that style,

```
<XmlTemplateFilePath>Page-Header-01.cfg</XmlTemplateFilePath>
```

and identifies the parameters available to the user when formatting text using the ArtText style.

```
<CustomizableParameters>
  <PropertyName>TextForeColor1</PropertyName>
  <PropertyName>TextForeColor2</PropertyName>
  <PropertyName>FontName</PropertyName>
  <PropertyName>FontSize</PropertyName>
</CustomizableParameters>
```

Wild Apricot's ArtText feature is based on Neodynamic ImageDraw. The .cfg files referenced by ArtTextStyles.cfg are XML files generated by the ImageDraw component. For instructions on modifying the style definitions in the .cfg files (or creating new ones), see the ImageDraw manual (ZIP file – 4 MB) for more information.

After you have modified or created the configuration files, upload them to your theme's ArtTextTemplates folder under the Theme_Overrides folder on your site using File management or WebDAV, then rebuild your theme.

Customizing Colors and Styles options for themes

Customizing Colors and Styles options for themes

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From the Colors and styles screen, you can change the colors and fonts of elements that appear throughout your site. Using theme overrides, you can customize the options appearing on the Colors and Styles screen for a particular theme.

Once you enable theme overrides and download the theme files, you'll find a PointAndClickSettings folder. Within this folder, there are two key files you can use to customize the colors and styles options:

- **cssTemplate.tpl** and
- **defaultValues.txt**

The defaultValues.txt file sets the defaults for colors and styles options and determines the order of the options on the **Colors and styles** scr een.

Customizing options

To customize the colors and styles options for a theme, you can add, modify, reorder, or remove entries in the defaultValues.txt file.

In the sample code below, each line corresponds to a separate option:

```
Global_settings-Background_color = #FFFFFF;
Global_settings-Text-Font_family = Verdana, Arial, Helvetica, sans-serif;
Global_settings-Text-Font_size = 0.80em;
Global_settings-Text-Font_weight = normal;
Global_settings-H1-Background_color = ;
```

Each entry in this file must use the following format (with items in square brackets being optional):

```
MenuName[-SubMenuName][-SubSubMenuName]-SelectorType = [DefaultValue];
```

Looking at the second last line in the sample code above...

```
Global_settings-Text-Font_weight = normal;
```

...we see that:

- **Global_settings** is the menu name
- **Text** is the submenu name
- **Font_weight** is the selector type
- **normal** is the default value

As a result, a **Font weight** option appears under **Global Settings > Text**.

Only letters and numbers are allowed in (sub)menu names, and they cannot begin with a number. If you want to use spaces in menu names, use underscore instead. If you want to use special characters line (?!" etc, use the following construction:

```
___45___
```

...where 45 is the ASCII code of the symbol in decimal format. For a list of ASCII codes for different symbols, click here.
Selector types

Wild Apricot supports the following selector types:

Selector	Accepts...
Background_image	a reference to an image
Background_position	top, bottom, left, right

Background_repeat	repeat, repeat-x, repeat-y, no-repeat
Background_color Color Font_color Outline_color Item_Color Border_color	Colors in #rrggbb format
Font Font_family	Typeface name
Size Font_size	Size in ems
Weight Font_weight	Bold, bolder, normal
Style Font_style	Italic, normal
Decoration Font_decoration Text_decoration	Underline, none

Mapping colors and styles options to CSS styles

The cssTemplate.tpl file maps entries in the defaultvalues.txt file to CSS styles used by your web pages. For example:

```
BODY
{
background-color: {Global_settings-Background_color};
}
```

When changes are made via Customizing colors and styles, Wild Apricot uses these files to generate the customStyles.css file, which is referenced by PageModel.Styles.

On this page:

- Customizing options
- Mapping colors and styles options to CSS styles

Adding custom button styles to themes

Adding custom button styles to themes

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When inserting a link, you can choose from a number of theme-specific button styles. To add custom button styles to a theme, follow these steps:

1. Enable theme overrides and download the theme files.
2. Within your theme's root folder, open the LinkStyles.cfg file for editing (using any text editor). It is a regular .XML file, with the following structure:

```
<LinkStyles>
  <Style>stylizedButton buttonStyle001</Style>
  <Style>stylizedButton buttonStyle002</Style>
</LinkStyles>
```

3. For each button style you want to add, insert another <Style> entry. The value within the <Style> and </Style> tags is the class name for the style.

```
<LinkStyles>
  <Style>stylizedButton buttonStyle001</Style>
  <Style>stylizedButton buttonStyle002</Style>
  <Style>myFavoriteButtonStyle</Style>
</LinkStyles>
```

> You can add compound classes as we did with the first two styles in the above example.

4. For each style, add the CSS class description to your CSS/LESS. For example:

```
.myFavoriteButtonStyle
{
  display: block;
  background-color: #000;
  color: #fff;
  padding: 5px 15px;
}
```

   For Treehouse, Clean lines, Whitespace, and Dark Impact themes, add the class to /Styles/link.styles.less. For all other themes, add the class to /Styles/theme.css or create a new CSS file under /Styles/ folder.
5. After you have finished modifying these files, upload them to the appropriate folder under the Theme_Overrides folder on your site using File management or WebDAV.
6. Rebuild your theme.

Your button style will now appear in the **Styles** dropdown on the **Insert link** dialog. The resulting HTML for links formatted using your custom button style would appear as follows:

```
<a href="#somelink" class="myFavoriteButtonStyle>Some text here</a>
```

Customizing other aspects of the theme

Customizing other aspects of the theme

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Specifying the recommended theme colors

The Colors.cfg file describes a set of recommended colors for your theme. This colors appear at the top of the color picker when selecting a color. Within the file, colors are defined in standard #RRGGBB format:

```
<Colors>
  <Color>#A03535</Color>
  <Color>#EF9502</Color>
  <Color>#FFE5BA</Color>
  <Color>#E1A753</Color>
  <Color>#FFA918</Color>
  <Color>#F26100</Color>
</Colors>
```

Defining divider styles for the theme

The DividerStyles.cfg file defines the divider styles available from the content editor. Each style entry is added to the divider image class, so you can customize dividers via CSS.

```
<DividerStyles>
  <!-- styles allows to change colour and weigth -->
  <Style>divider_style_border_solid</Style>
  <Style>divider_style_border_dotted</Style>
  <Style>divider_style_border_dashed</Style>
  <Style>divider_style_border_double_solid</Style>
  <Style>divider_style_border_double_solid_2_to_1</Style>
</DividerStyles>
```

Defining typefaces for the theme

The FontStyles.cfg file defines the typefaces or font name available from the content editor. Within the file, each entry consists of the typeface's display name and its system name.

```
<FormatStyles>
  <Style Name="Arial" Font="Arial, Helvetica, sans-serif" />
  <Style Name="Comic Sans MS" Font="Comic Sans MS" />
  <Style Name="Courier" Font="Courier" />
  <Style Name="Georgia" Font="Georgia" />
  <Style Name="Impact" Font="Impact" />
  <Style Name="Helvetica" Font="Helvetica" />
  <Style Name="Lucida Console" Font="Lucida Console" />
  <Style Name="Tahoma" Font="Tahoma" />
  <Style Name="Times New Roman" Font="Times New Roman" />
  <Style Name="Verdana" Font="Verdana" />
</FormatStyles>
```

Defining text styles for the theme

The FormatStyles.cfg file lists the text styles available from the content editor. Each entry consist of element name (e.g H1) and the classname applied to it.

```
<FormatStyles>
  <Style Name="Normal" Tag="P" Class="" />
  <Style Name="Page title" Tag="H1" Class="pageTitle" />
  <Style Name="Heading1" Tag="H1" Class="" />
  <Style Name="H1 Alternative" Tag="H1" Class="contStyleExcHeadingColored" />
  <Style Name="Heading2" Tag="H2" Class="" />
  <Style Name="H2 Alternative" Tag="H2" Class="contStyleExcHeadingColored" />
  <Style Name="Heading3" Tag="H3" Class="" />
  <Style Name="H3 Alternative" Tag="H3" Class="contStyleExcHeadingColored" />
  <Style Name="Heading4" Tag="H4" Class="" />
  <Style Name="H4 Alternative" Tag="H4" Class="contStyleExcHeadingColored" />
  <Style Name="Alt color 1" Tag="P" Class="contStyleExcInlineColored1" />
  <Style Name="Alt color 2" Tag="P" Class="contStyleExcInlineColored2" />
  <Style Name="Alt highlighted" Tag="P" Class="contStyleExcInlineHighlighted" />
  <Style Name="Larger" Tag="P" Class="contStyleExcInlineLarger" />
  <Style Name="Smaller" Tag="P" Class="contStyleExcInlineSmaller" />
  <Style Name="Quoted" Tag="blockquote" Class="quotedText" />
</FormatStyles>
```

Associating themes with themesets

The SystemConfig.cfg file states which themeset your theme belongs to. It uses the following syntax:

```
<SystemTheme>
  <ThemeSetId>AuroraHorizontal</ThemeSetId>
</SystemTheme>
```

On this page:

Theme and page generation process

Theme and page generation process

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Your web pages on your Wild Apricot site are generated on the fly using your site's theme together with any theme overrides. The actual process by which each site page is generated is as follows.

1. Theme assembly

The theme will be assembled as follows:

1. System reads config file of currently selected theme (MainConfig.cfg).
2. If there is a <ParentId> option set, it reads config file of parent theme. The process repeats until system encounters parentless theme

(the root theme).
3. All files from root theme are copied to special assembly folder.
4. All files from child themes are copied to the same folder, overwriting parent files.
5. Files from Theme_overrides folder are copied to the same folder.

2. Gadget assembly

1. Gadgets and controls are copied to theme directory under Gadgets and Controls folders accordingly.
2. Files from Theme_overrides folders are copied to the same folders.

3. CSS and JavaScript parsing

1. Style sheets and JavaScripts are loaded from Head.tpl, included in MainTemplate.tpl.

4. StringTemplate page parsing

1. System reads MainTemplate.tpl file located in the root of assembled theme. This file is an entry point for theme rendering.
2. System parses MainTemplate.tpl, replacing all <$...$> constructions with their values.
3. If the system finds a <$templateName()$> construction, it opens templateName.tpl file, parses it with StringTemplate engine and adds its content to resulting HTML.
4. <$LAYOUT$> construction is replaced it with master layout file, currently located in Layouts/LayoutsTemplate.tpl and is parsed.
5. <$Gadget name="gadgetName"$> tags are replaced with corresponding gadgets code and parsed. Entry point for every gadget is GadgetTemplate.tpl file.
6. <$CONTENT$> tag is replaced with content of current page from the page content database.

The page is now complete and is sent to the browser to be displayed.

Theme inheritance

Inheritance allows you to pass attributes from one template to another child template. Let's imagine the following situation:

We have a theme **Theme1** which has no parents (e.g,. it is standalone theme).
Here's an example of key theme files structure:

```
/Theme1/
/Theme1/MainConfig.cfg
/Theme1/MainTemplate.tpl
/Theme1/Layouts/LayoutsTemplate.tpl
```

Now, let's say we have **Theme2** theme, and its parent is **Theme1** theme. We set the theme's parent in theme config file.
It's file structure would look like this:

```
/Theme2/
/Theme2/MainConfig.cfg
```

When theme builder builds your theme, first it loads all the files from your parent theme and then it loads all the files from your theme. The files from your theme will overwrite any files with the same name in the parent theme. The final result is an **assembled theme** and consists of all files from parent theme overwritten by sibling themes. In our example, here's full assembled file structure of **Theme2** theme:

```
/Theme2/
/Theme2/MainConfig.cfg (file from *Theme2*, overrides *Theme1* file with the same
name)
/Theme2/MainTemplate.tpl (taken from *Theme1* theme)
/Theme2/Layouts/LayoutsTemplate.tpl (also taken from *Theme1* theme)
```

You can go even further and create third level of inheritance.

On this page:

CSS, LESS, and JavaScript processing

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CSS stands for Cascading Style Sheets. CSS code, stored in CSS files, is used to define the styles that determine the appearance of elements within your site pages. The overall appearance of website themes supplied by Wild Apricot is controlled by CSS (and an extension of CSS called LESS) stored in Theme.css (or Theme.less) files.

Wild Apricot uses LESS – in fact, a .NET server-side implementation of LESS called dotless – in some of our templates (e.g. the Nature themeset) to make them easier to customize.

CSS loading and sequence

Every CSS file in a theme's Styles folder is automatically added to the PageModel.Styles collection, and can be easily iterated. For example:

```
<$PageModel.Styles:
{
  <link href="<$it.Path$>" rel="stylesheet" type="text/css" />
}$>
```

See Theme files language syntax for more information.

SS and LESS files are added to PageModel.Styles in the following order:

- All CSS files in the Styles folder (in alphabetical order)
- Styles/Theme.less (if you need more than one LESS, please use LESS internal @import directive)
- CustomStyles.css (autogenerated by changes to Colors and styles)
- User.css (changed via CSS customization)

JavaScript loading

JavaScripts are loaded in a similar fashion to CSS files. Every JavaScript file stored in a theme's Scripts folder is automatically added to the PageModel. Scripts are collected in alphabetical order and can be easily iterated. For example:

```
<$PageModel.Scripts:
{
  <script type="text/javascript" language="javascript" src="<$it.Path$>"
id="<$it.Id$>">
}$>
```

If you add scripts via Settings > Custom JavaScript, it can also be easily added to your page:

```
<$PageModel.InlineScripts:
{
  <script type="text/javascript" language="javascript" id="<$it.Id$>">
    <$it.Source$>
  </script>
}$>
```

The jQuery library is automatically loaded for all website themes.

CSS, LESS, and JavaScript templating

Every stylesheet in a theme's Styles folder is parsed by the StringTemplate internal parser before output. There are some variables available for use in these files:

- StaticModel.ThemeUrl – one of the most important variables for your LESS/JS/CSS files. It shows a path to your theme folder. All links to your theme images, scripts, etc. should look like this:

  ```
  #idHeaderContainer .d1
  {
       background: transparent
  url(<$StaticModel.ThemeUrl$>/images/bg-header.gif);
  }
  ```

- StaticModel.ThemeId – Your theme's ID (name)
- StaticModel.ThemeVersion – theme version
- StaticModel.ThemeBuildVersion – theme build version

On this page:

Technical reference

Technical reference - Theme overrides

For technical details regarding theme overrides, see one of the topics below.

Gadget setting attributes

Gadget setting attributes

The following attributes are available for the Setting tag used to control the appearance and behavior of gadgets.

- **name** – mandatory, setting name. Is referenced by it in template: <$Model.Settings.**SettingName**$> and in SettingsLayout.cfg
- **type** – mandatory, one of build-in types:
  - **string**. default control: **TextBox**
  - **number**. default control: **Number**
  - **boolean**. default control: **CheckBox**

        - **cssSize**. default control: **CssSize**
        - **cssoffset**. default control: **cssoffset**
        - **background**. default control: **Background**
        - **list**. default control: **RadioButtonList**
- **title** – shown near setting input control in settings panel
- **titleDescription** – title description for view control
- **description** – description for view control
- **hint** – hint for view control
- **required** – setup required validator for this setting (true/false)
- **maxLength** – setup maxlength validator for this setting (limitation to maximum setting value)
- **defaultControlType** – default view control
- **defaultValue** – default value for this setting
- **initialValue** – initial setting value that comes from server

Gadget usage in themes

Gadget usage in themes

Use of gadgets differ from theme to theme, depending on which theme prototype a theme is based on. See Theme folder names to determine which prototype your theme belongs to.

theme-gadget	business_casual.v2.0	granite.v2.0	horizontal.v1.0	hybrid.v1.0	main.v1.0	main.v3.0	simple.v3.0	treehouse.v3.0
Sys.AddMemberToBundle.1.0	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes
Sys.AuthorizationRequired.1.0	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes
Sys.AnonymousPaymentProfile.1.0	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes
Sys.BlogPost.1.0	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes
Sys.EventDetails.1.0	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes
Sys.EventRegistration.1.0	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes
Sys.FinDocument.1.0	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes
Sys.ResetPasswordRequest.1.0	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes
Sys.ForumTopic.1.0	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes
Sys.ContactProfile.1.0	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes
Sys.MemberPublicProfile.1.0	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes

Sys.MembershipLevelChange.1.0	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes
Sys.MembershipRenewal.1.0	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes
Sys.ChangePassword.1.0	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes
Sys.ResetPassword.1.0	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes
Sys.EmailMember.1.0	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes
Sys.TermsOfUse.1.0	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes
Sys.UnsubscribeFromEmails.1.0	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes
Content.1.0	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes
CustomHTML.1.0	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes
GoogleMap.1.0	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes
PhotoAlbum.1.0	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes
Slideshow.1.0	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes
MembershipApplication.1.0	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes
MemberDirectory.1.0	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes
SubscriptionForm.1.0	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes
EventCalendar.1.0	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes
UpcomingEvents.1.0	Yes	Yes	Yes	Yes	Yes			
DonationForm.1.0	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes
DonationGoal.1.0	Yes	Yes	Yes	Yes	Yes			
SocialProfile.1.0	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes

FacebookLikeBox.1.0	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes
SharingButtons.1.0	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes
Blog.1.0	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes
RecentBlogPosts.1.0	Yes	Yes	Yes	Yes	Yes			
DiscussionForum.1.0	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes
ForumSummary.1.0	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes
ForumUpdates.1.0	Yes	Yes	Yes	Yes	Yes			
Menu.Horizontal.2.0	Yes	Yes						
BreadCrumbs.1.0	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes
NavigationLinks.1.0	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes
SiteMap.1.0	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes
Login.LoginForm.2.0	Yes	Yes						
Login.LoginButton.1.0	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes
Menu.Horizontal.1.0			Yes					
Login.LoginForm.1.0			Yes	Yes	Yes			
Menu.Hybrid.1.0				Yes				
Menu.Vertical.1.0					Yes			
UpcomingEvents.2.0						Yes	Yes	Yes
DonationGoal.2.0						Yes	Yes	Yes
RecentBlogPosts.2.0						Yes	Yes	Yes
ForumUpdates.2.0						Yes	Yes	Yes
Menu.Horizontal.3.0						Yes	Yes	Yes
Menu.Vertical.2.0						Yes	Yes	Yes

Login.Login Form.3.0						Yes	Yes	Yes

Theme files language syntax

Theme files language syntax

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Wild Apricot theme files use a combination of HTML and StringTemplate code.

Here's some brief information on using template language in Wild Apricot themes:

Template variables

There are two ways for variables to be set in your template. (A template is the file containing the actual code for a gadget or other theme component.)

1. Passing variables as a parameter in a template call.
2. Using pre-defined variables (or *properties*).

There are different sets of preset properties for general page templates and for each gadget. You may output template property values by using the following syntax.

```
<$PropertyName$>
```

For a list of available properties, see Customizing theme gadgets.

Using templates

You can load a template into a page using the following syntax:

```
<$TemplateName()$>
```

This loads TemplateName.tpl located in **root folder** of your theme. To load template located in Layouts folder e.g. Layouts/Helpful.tpl), use <$Layouts/Helpful()$> instead.

Passing parameters

You can pass parameters to templates by specifying them using the following syntax:

```
<$TemplateName(param1 = value1)$>
```

You can specify more then one parameter, separate them with commas like this:

```
<$TemplateName(param1 = value1, param2 = value2)$>
```

Within the template, you can access parameters passed to it via the following syntax:

```
<$param1$>
```

This code would output **value1** in its place.

You can also pass parameters to make conditional calls to your template (see below).

Using conditional statements

You can use conditional statements to check if a property has been set. For example, you could use the following code to check if a property is true and then return some HTML content:

```
<$if(PropertyName)$>
...code to be executed...
<$endif$>
```

or you could also check the opposite condition using the **!** modifier, for example:

```
<$if(!PropertyName)$>
...code to be executed...
<$endif$>
```

You can use both *if* and *else* statements to provide alternate code to be executed depending on the property:

```
<$if(PropertyName)$>
...code to be executed...
<$else$>
...code to be executed...
<$endif$>
```

You also can use && (and) and || (or) operands in your expressions:

```
<div id="idContentContainer" class="cnContentContainer<$if
(PageModel.Page.IsItemWithChildren || PageModel.Page.IsChildItem)$>
rootHasSubitems<$endif$>">
```

In this example we add a special class if our page has children. This is live example from one of our templates.

You can also check against strings and numbers, like we do in **Social sharing buttons** gadget:

```
<$Model.Settings.SocialButtons:{

         <$if (it == "FacebookValue")$>
   <div class="socialSharingButton">
    <$Model.Settings.FacebookCode$>
   </div>
  <$endif$>

  <$if (it == "TwitterValue")$>
   <div class="socialSharingButton">
    <$Model.Settings.TwitterCode$>
   </div>
  <$endif$>

  <$if (it == "LinkedInValue")$>
   <div class="socialSharingButton">
    <$Model.Settings.LinkedInCode$>
   </div>
  <$endif$>

  <$if (it == "GooglePlusValue")$>
   <div class="socialSharingButton">
    <$Model.Settings.GooglePlusCode$>
   </div>
  <$endif$>

}$>
```

In this real-world example we iterate thru our SocialButtons collection (see Iterators just below) and render bits of code based on current item' in collection value.

Using iterators

Sometimes you need to display a collection or a set of elements, such as a list of menu items. To do this, you use *iterators* to process each item in the collection. For example:

```
<$ItemsCollectionName:IteratorTemplate()$>
```

Here **ItemsCollectionName** is the name of items collection, and IteratorTemplate is a name of .tpl file to be called for every item in the collection. To access the value of each collection item, you use a special template variable **it**. For example, the following code would output the value of the currently iterated item.

```
<$it.Name$>
```

It is sometimes unnecessary to create a separate iterator template for every item collection you want to iterate. In this case, you can create an inline iterator template. For example, the following code would iterate over ItemsCollectionName and output name of every item's Name property:

```
<$ItemsCollectionName:
{
  <$it.Name$>
}
$>
```

On this page:

Partner directory

Redirection Notice
This page will redirect to http://www.wildapricot.com/partners/.

Customization examples

Customization examples

CSS customization examples

- Changing button colors
- Changing the widget width
- Customizing blogs using CSS
- Customizing forums using CSS and JavaScript
- Changing the page width

Using third-party tools

- Adding a Twitter feed
- Adding interactive ZeeMaps
- Embedding external photo galleries
- Adding video clips
- Adding Flash animations to your site
- Embedding audio on your site
- Setting up an online store
- Inserting custom forms
- Tracking website traffic

Other customization examples

- Changing button labels
- Making menu items not clickable
- Adding social networks to social profile gadget
- Changing the behavior of the Cancel button on membership application

Changing button labels

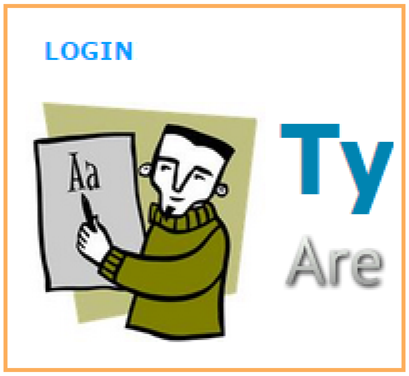
Changing button labels

Using JavaScript, you can change the text that appears on various buttons on your Wild Apricot site.

Changing the Login label

Within log in button gadgets

A **Login** button appears within the log in button gadget.



You change the text appearing on the button to something else, such as "Sign in".

To change the **Login** button label on the log in button gadget, follow these steps:

Read more/less

1. Go to **Settings** then click **Global JavaScript** (under **Site settings**).
2. On the **Global JavaScript** screen that appears, copy and paste the following code:

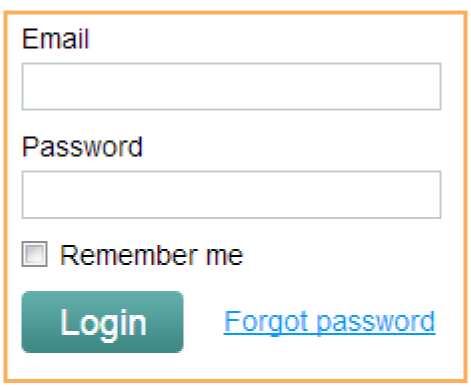
```
<script type="text/javascript">
jq$(document).ready(function(){
jq$('.WaGadgetLoginButton .loginBoxLinkContainer
.loginBoxLinkButton').html("Sign in");
});
</script>
```

   where *Sign in* can be changed to whatever label you want.
3. Click **Save**.

The button will now appear with the new label you specified.

Within log in form gadgets

A **Login** button appears within the log in form gadget.



You change the text appearing on the button to something else, such as "Sign in".

To change the **Login** button label on the log in form gadget, follow these steps:

Read more/less

1. Go to **Settings** then click **Global JavaScript** (under **Site settings**).
2. On the **Global JavaScript** screen that appears, copy and paste the appropriate code for your theme.

   For Business Casual themes, copy this code:

```
<script type="text/javascript">
jq$(document).ready(function(){
    jq$('.WaGadgetLoginForm .loginBoxLoginButton').val("Sign in");
});
</script>
```

For Aurora, Basic, Classic, Clouds, Dark, Glass, Keynote, Memo, Modern, Nature, Notebook, and Transparent themes, copy this code:

```
<script type="text/javascript">
jq$(document).ready(function(){
    jq$('.loginContainer .loginAction INPUT.loginButton').val("Sign in");
});
</script>
```

For all other themes, copy this code:

```
<script type="text/javascript">
jq$(document).ready(function(){
    jq$('.WaGadgetLoginForm .loginContainerForm .loginAction
input.loginButton').val("Sign in");
    jq$('.WaGadgetLoginForm .loginContainerWrapper
.loginContainerInnerWrapper .loginLink').html("Sign in");
});
</script>
```

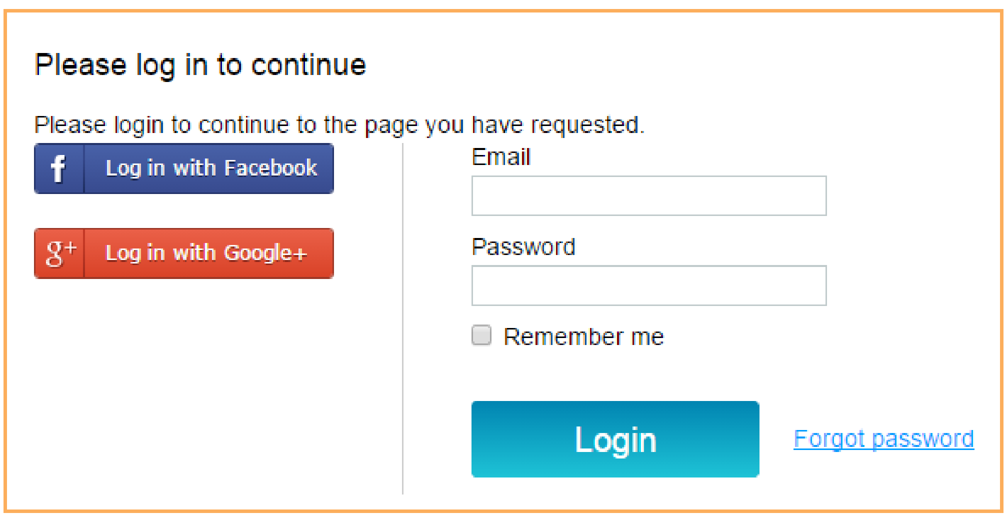
and change both occurrences of "Sign in" to whatever label you want.

3. Click **Save**.

The button will now appear with the new label you specified.

Within the Authorization required system page

Once a member clicks the button to log or sign in, the **Authorization required** system page appears.



To change the **Login** button that appears on this screen, follow these steps:

Read more/less

1. Go to **Settings** then click **Global JavaScript** (under **Site settings**).
2. On the **Global JavaScript** screen that appears, copy and paste the following code:

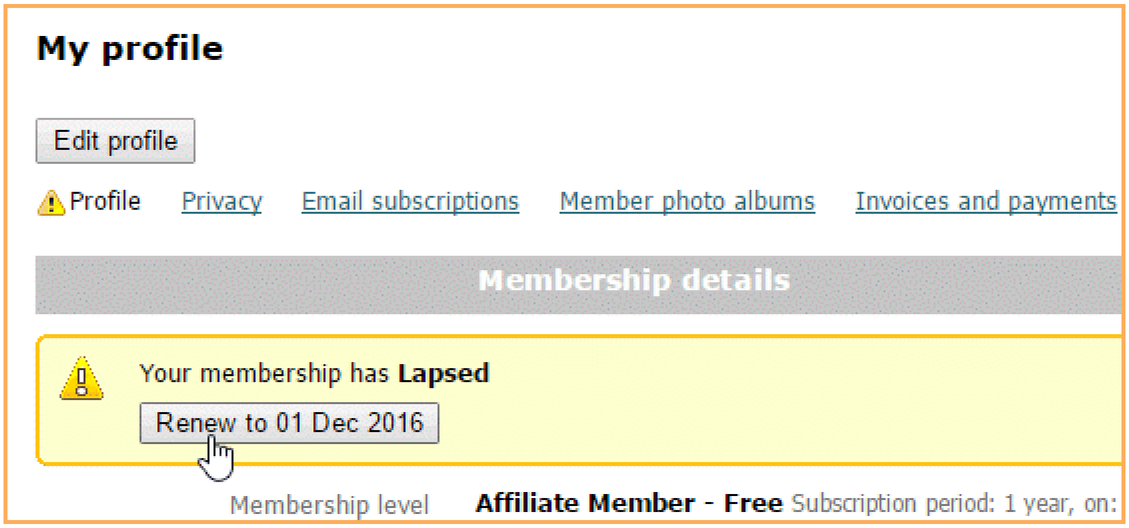
```
<script type="text/javascript">
jq$(document).ready(function(){
    jq$('.WaGadgetAuthorizationRequired .loginPageTable #idSubmitBox
#idLoginButtonBox span input.loginButton').val("Sign in");
});
</script>
```

   where *Sign in* can be changed to whatever label you want.
3. Click **Save**.

The system page will now display the button using the label you specified.

Changing the Renew button label

You can change the label for the **Renew to** button that appears within a member's **Membership details** tab.



You can change the label separately for active members and for lapsed members.

To change the **Renew to** button label, follow these steps:
Read more/less

1. Go to **Settings** then click **Global JavaScript** (under **Site settings**).
2. For active members, copy and paste the following code:

```
<script type="text/javascript">
    if (!top.adminpanel) {
        var  renewLabel =

document.getElementById('FunctionalBlock1_ctl00_ctl00_Membership_RenewalBut
ton');


        if (renewLabel) {
            renewLabel.value = 'Renew now';
        }
    }
</script>
```

For lapsed members, copy and paste the following code:

```
<script type="text/javascript">
    if (!top.adminpanel) {
        var  renewLabel =

document.getElementById('FunctionalBlock1_ctl00_ctl00_Membership_lapsedMess
ageBox_renewButton');


        if (renewLabel) {
            renewLabel.value = 'Renew Now';
        }
    }
</script>
```

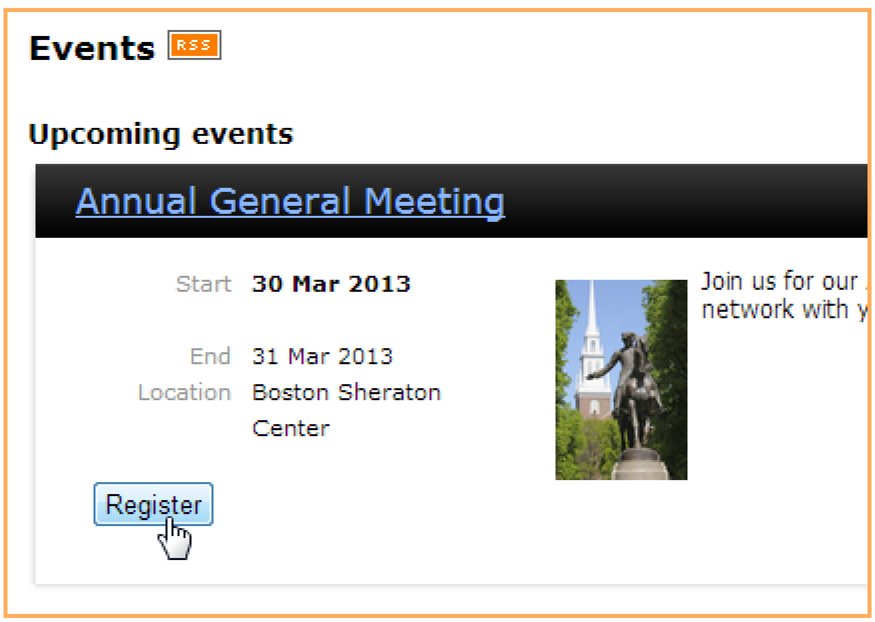
where *Renew now* can be changed to whatever label you want.

3. Click **Save**.

The button will now appear with the new label you specified.

Changing the Register button label

The **Register** button appears on the events calendar page and on the event details page. Using the **Register** button, visitors to your site can sign up for events.



You change the text appearing on the button to something else, such as "Sign up".

To change the **Register** button label on the events calendar page, follow these steps:

Read more/less

1. Go to **Settings** then click **Global JavaScript** (under **Site settings**).
2. Copy and paste the following code:

```
<script type="text/javascript">
if (!top.adminpanel){
$(".boxActionContainer").find("input").val("Sign up");
}
</script>
```

where *Sign up* can be changed to whatever label you want.

3. Click **Save**.

To change the **Register** button label on the event details page, follow these steps:

1. Go to **Settings** then click **Global JavaScript** (under **Site settings**).
2. Copy and paste the following code:

```
<script type="text/javascript">
if (!top.adminpanel){
document.getElementById("FunctionalBlock1_ctl00_eventPageViewBase_ctl00_ctl
00_eventRegistrationActions_lobRegistration_bt").value="Sign up";
}
</script>
```

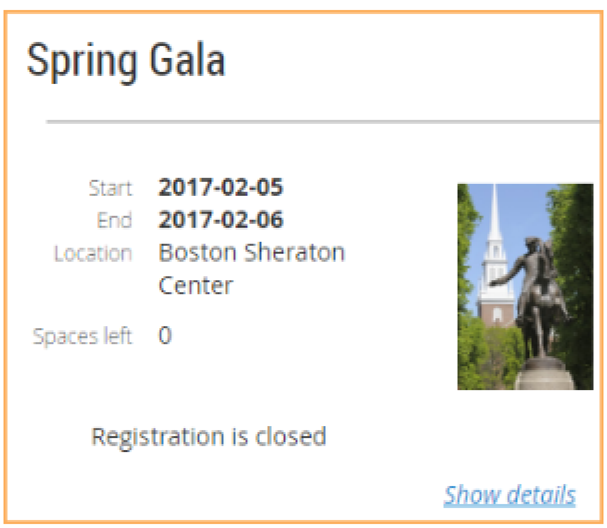
where *Sign up* can be changed to whatever label you want.

3. Click **Save**.

The button will now appear with the new label you specified.

Changing the Registration is closed label

When an event is full, and a waitlist has not been enabled, the **Register** button will be replaced with a message saying *Registration is closed* on both the event calendar and the event details page.



To change this message to something else, such as "Sorry, no more room!", follow these steps:

Read more/less

1. Go to **Settings** then click **Global JavaScript** (under **Site settings**).
2. Copy and paste the following code:

```
<script type="text/javascript">
jq$(document).ready(function(){
    jq$('.infoRegistrationIsClosed').html('Sorry, no more room!');
});
</script>
```

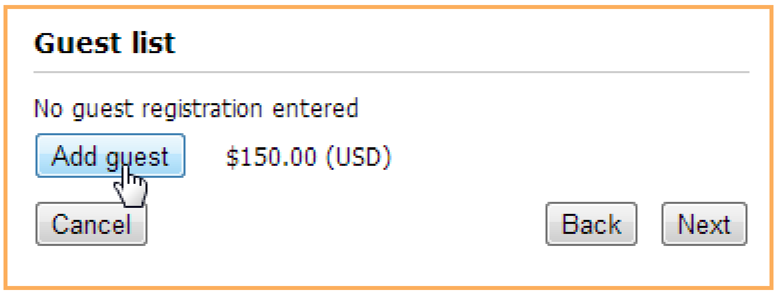
where *Sorry, no more room!* can be changed to whatever label you want.

3. Click **Save**.

The message you specified will now appear in place of *Registration is closed*.

Changing the Add Guest button label

The **Add guest** button appears on an event registration form when you enable guest registrations and choose to collect information for each guest.



You can change the text appearing on the button to something else, like "Add family member".

To change the **Add guest** button label, follow these steps:

Read more/less

1. Go to **Settings** then click **Global JavaScript** (under **Site settings**).
2. Copy and paste the following code:

```
<script type="text/javascript">
    if (!top.adminpanel) {

        var myPage =
document.getElementById('idSectionGuestListContainer');
        if (myPage) {
            myPage.innerHTML = myPage.innerHTML.replace('Add guest', 'Add
family member');

        }
    }
</script>
```

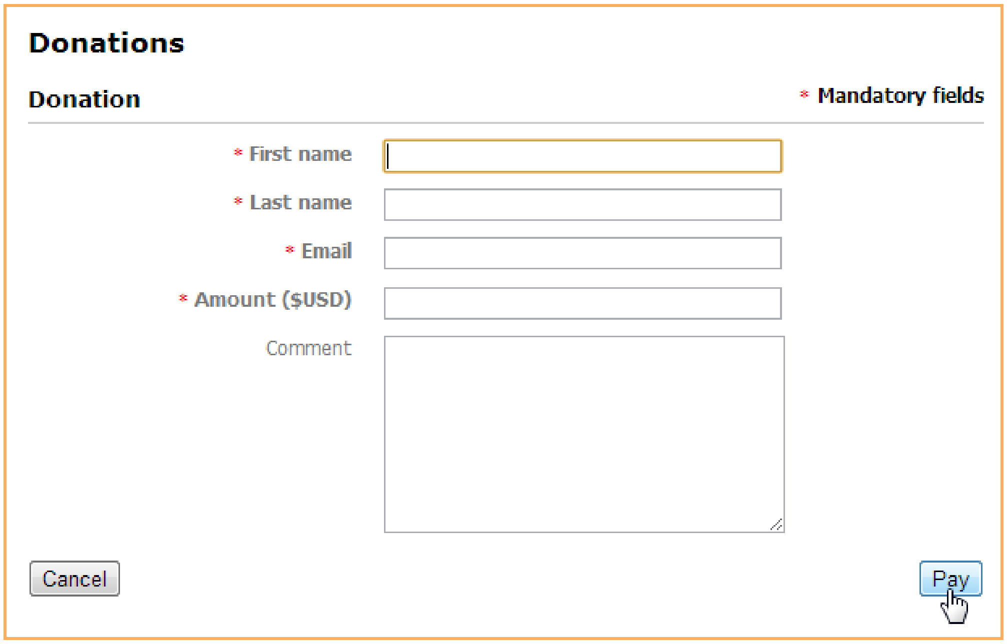
where *Add family member* can be changed to whatever label you want.

3. Click **Save**.

The button will now appear with the new label you specified.

Changing the Pay button label

When a visitor to your site chooses to make a donation from a donations page, they click the **Pay** button.



You can change the text appearing on the **Pay** button to something else, like "Donate".

To change the **Pay** button label, follow these steps:

Read more/less

1. Go to **Settings** then click **Global JavaScript** (under **Site settings**).
2. Copy and paste the following code:

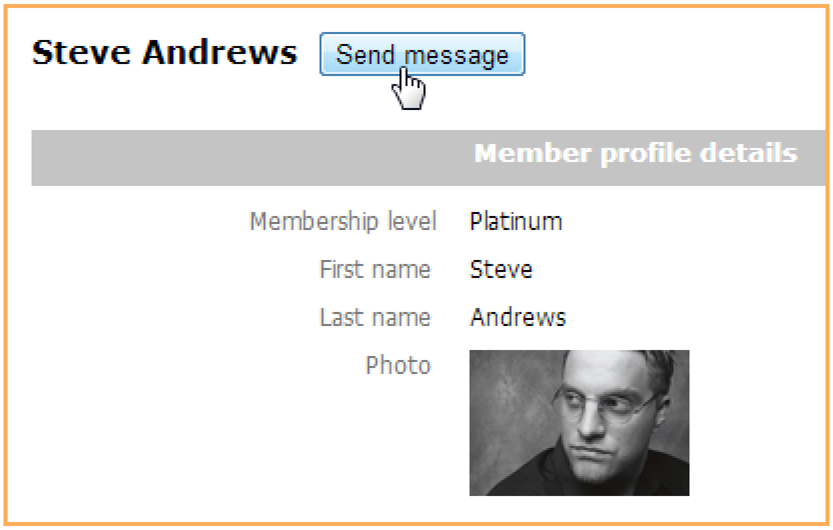
```
<script type="text/javascript">
    if (!top.adminpanel) {
        var myPage = document.getElementById('DonationGadgetHTMLID');

        if (myPage) {
            myPage.innerHTML = myPage.innerHTML.replace('Pay', 'Donate');
        }
    }

</script>
```

   where *DonationGadgetHTMLID* is replaced by the HTML ID of your donation gadget, and *Donate* can be changed to whatever label you want. For instructions on locating a gadget's HTML ID, click here.
3. Click **Save**.

The button will now appear with the new label you specified.

Changing the Send Message button label

From a member directory, visitors can email a member by clicking the **Send message** button from the member profile screen.



You can change the text appearing on the button to something else, like "Email me".

To change the **Send message** button label, follow these steps:

Read more/less

1. Go to **Settings** then click **Global JavaScript** (under **Site settings**).
2. Copy and paste the following code:

```
<script type="text/javascript">
    if (!top.adminpanel) {
        var sendMessage =

document.getElementById('FunctionalBlock1_ctl00_ctl00_memberProfile_profile
Header_idSendEmailButton');


        if (sendMessage) {
            sendMessage.value = 'Email me';
        }
    }
</script>
```

   where *Email me* can be changed to whatever label you want.
3. Click **Save**.

The button will now appear with the new label you specified.

On this page:

button label

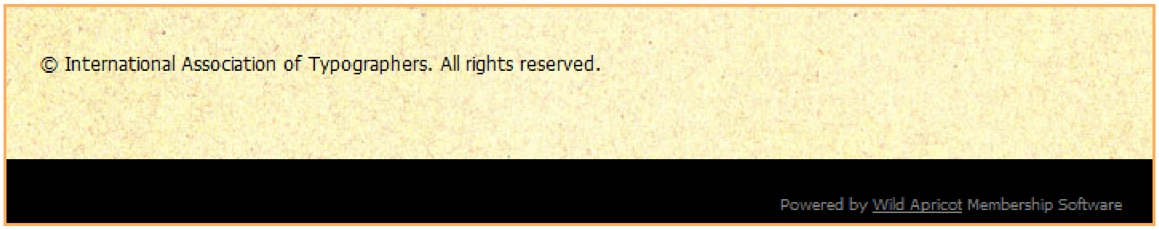
See also:

- Inserting and modifying HTML or JavaScript

Hiding Powered By branding

Hiding "Powered By" branding

Every Wild Apricot website shows "Powered by..." branding below the site footer:



We would really appreciate if you could keep it as is – these links are helping us to spread the word and get new potential customers (which in its turns helps us to grow and invest more and more into ongoing product development, benefiting all of our clients).

If you really have to hide it, you can contact Wild Apricot support and ask them to switch off Wild Apricot branding.

This option is only available for paid accounts.

Do not use CSS code to hide this branding. This approach makes your site look like spam since our branding and links will still be visible to search engine crawlers, resulting in possible penalties to your site and ours.

Need more help?

- Check out our customization forums
- See our Partner directory to find a consultant

Changing the behavior of the Cancel button on membership application

Changing the behavior of the Cancel button on membership application

Normally, when a visitor clicks the **Cancel** button from the membership application form, they are returned to your Wild Apricot site's homepage. If you want to direct them to a different location, follow these steps.

1. Go to **Settings** then click **Global JavaScript** (under **Site settings**).
2. Copy and paste the following code:

```
<script>

$('.WaGadgetMembershipApplication .navigationContainer
input[type=button][value=Cancel]').click(function(){
  Page_ValidationActive = false;
  location.href = "redirect_page_url";
});

</script
```

3. Change *redirect_page_url* to the complete URL of the page you want to direct them to when they click **Cancel** .

For example:

```
<script>

$('.WaGadgetMembershipApplication .navigationContainer
input[type=button][value=Cancel]').click(function(){
  Page_ValidationActive = false;
  location.href = "https://stevelivetestsite.wildapricot.org/events";
});

</script
```

4. Click **Save**.

Extending your website with third-party tools

Extending your website with third-party tools

To incorporate features in your site that Wild Apricot does not currently support, you can embed code from third-party sites. For example, Wild Apricot does not provide support for an online store, but Ecwid does, and allows you to embed code to add the store to another site.

Help topics are provided below to walk you through the process of embedding third-party functionality into your Wild Apricot site, but for the most part, the process involves the same basic steps:

1. Find and copy the embed code.
2. Paste the embed code into a custom HTML gadget, or into a content gadget using the Snippet feature, on a page or page template

Troubleshooting

- Most external widgets use the *http* protocol by default or exclusively. If you embed them into a Wild Apricot site that's accessed using the encrypted *https* protocol, the widget may not be displayed, or may generate an error message, depending on the browser. The solution is either to turn off the traffic encryption on your Wild Apricot site, or modify the embedded widget code to use *https* (where supported).
- iOS devices – including iPads – do not provide native support for Flash, so avoid embedding any functionality that uses Flash if you want your users to view your site on iOS devices.

Step by step guides

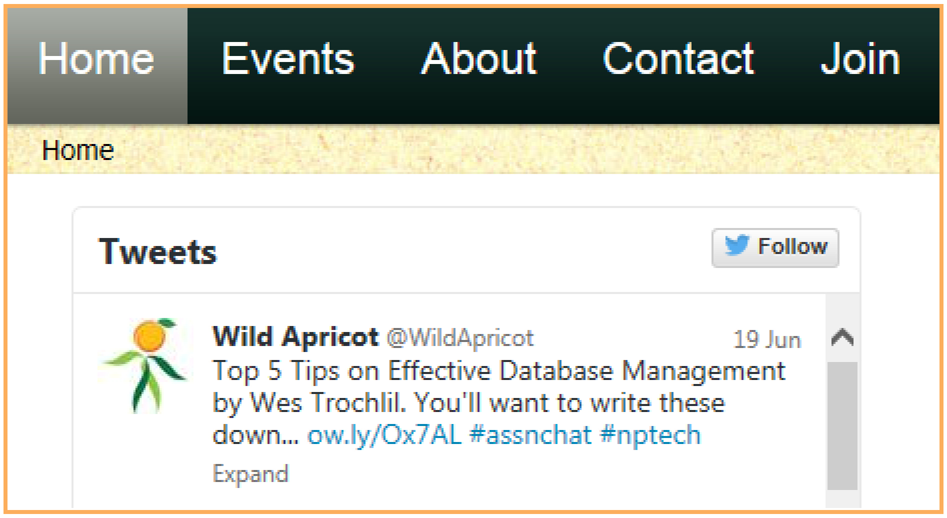
- Adding a Twitter feed
- Adding interactive ZeeMaps
- Embedding external photo galleries
- Adding video clips
- Adding Flash animations to your site
- Embedding audio on your site
- Setting up an online store
- Inserting custom forms
- Tracking website traffic

Adding a Twitter feed

Adding a Twitter feed

> Instructions for third-party services like this are provided as a courtesy and may contain out of date information or screen clips. For the latest instructions, consult the third party's website.

You can embed a Tweeter feed – known as a timeline – into a page on your Wild Apricot site.



You can choose from the following types of timelines:

- **User timeline** – displays all public tweets from a specific Twitter user
- **Favorites** – displays all tweets marked as favorites from a specific user
- **List** – displays tweets from public lists that you own and/or subscribe to
- **Search** – display customized search results in real time

> ⚠ Embedded timelines will only display content from users with public tweets.

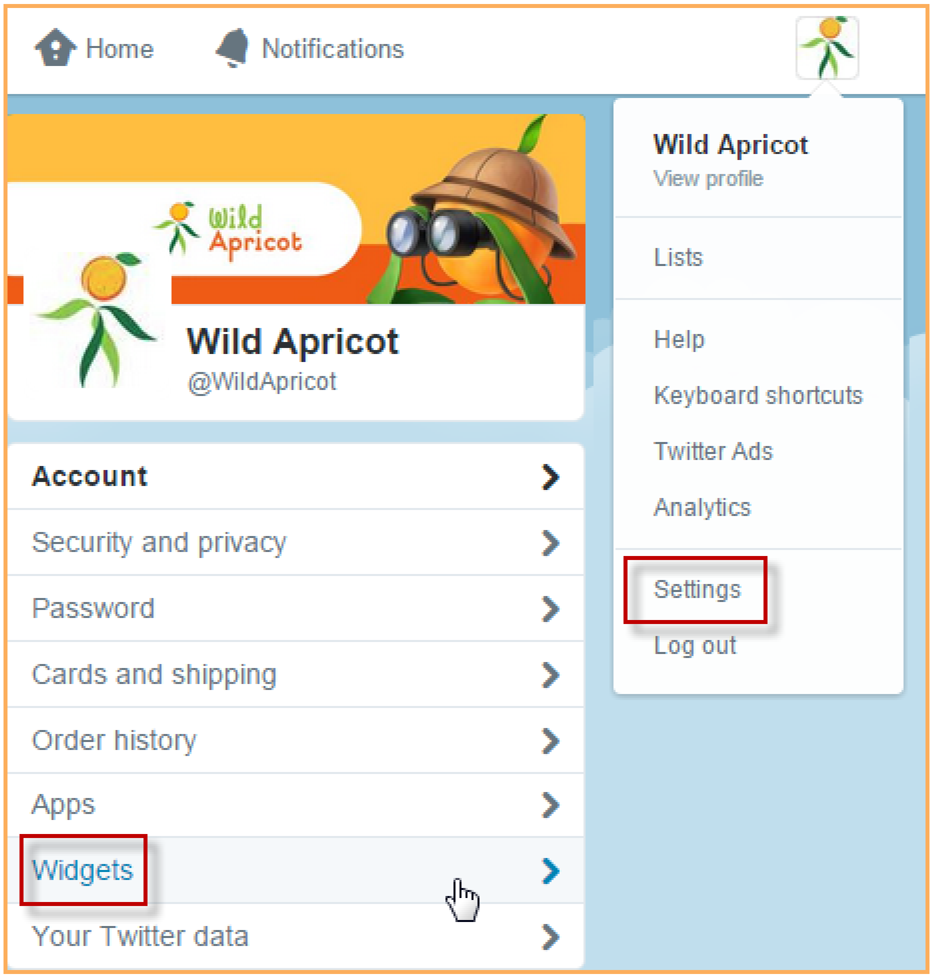
There are two stages in the process of embedding a Twitter feed on a Wild Apricot page: getting the embed code, and pasting the code in Wild Apricot.

Getting the embed code

To get the embed code for a Twitter timeline, follow these steps:

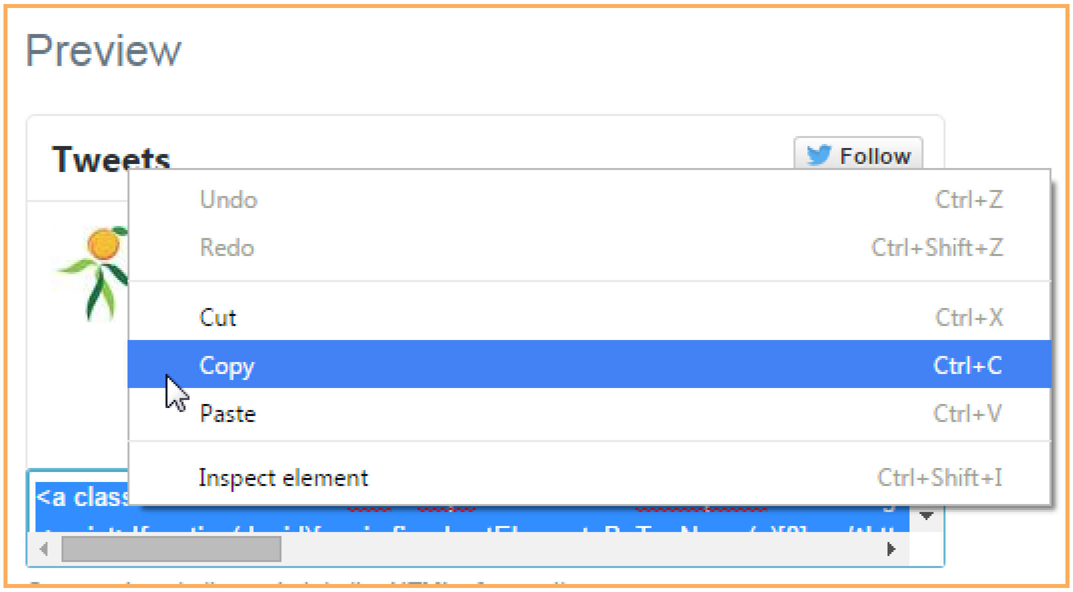
Read more/less

1. Sign in to Twitter.
2. Go to your settings and select **Widgets**.



3. Click **Create new**.

4. Choose the type of embedded timeline you'd like, and adjust its settings. For user timelines and favorites, enter the username of the Twitter user. For lists, select a public list that you own or subscribe to. For searches, enter your search query.
5. Click the **Create widget** button.
6. Copy the embed code.

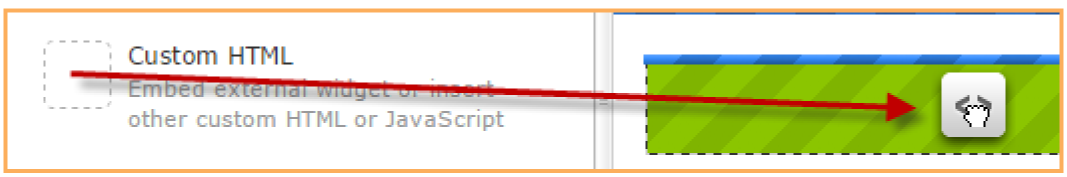


Pasting the embed code in Wild Apricot

To paste the embed code in Wild Apricot, follow these steps:

Read more/less

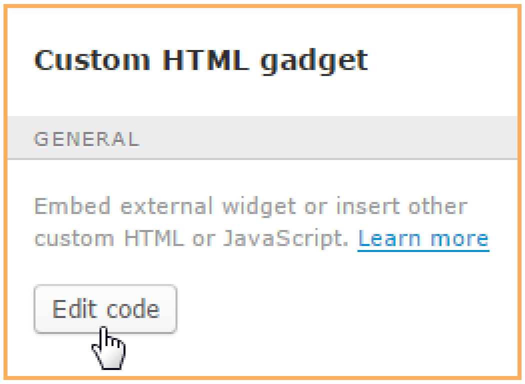
1. Log in to your Wild Apricot site as an administrator.
2. Go to **Sites pages** (under the **Website** menu) and begin editing the site page or page template where you want the Twitter feed to appear.
3. Click the **Gadgets** icon to display the list of available gadgets.
4. Drag the custom HTML gadget from the Gadget list, and drop it in the desired location.



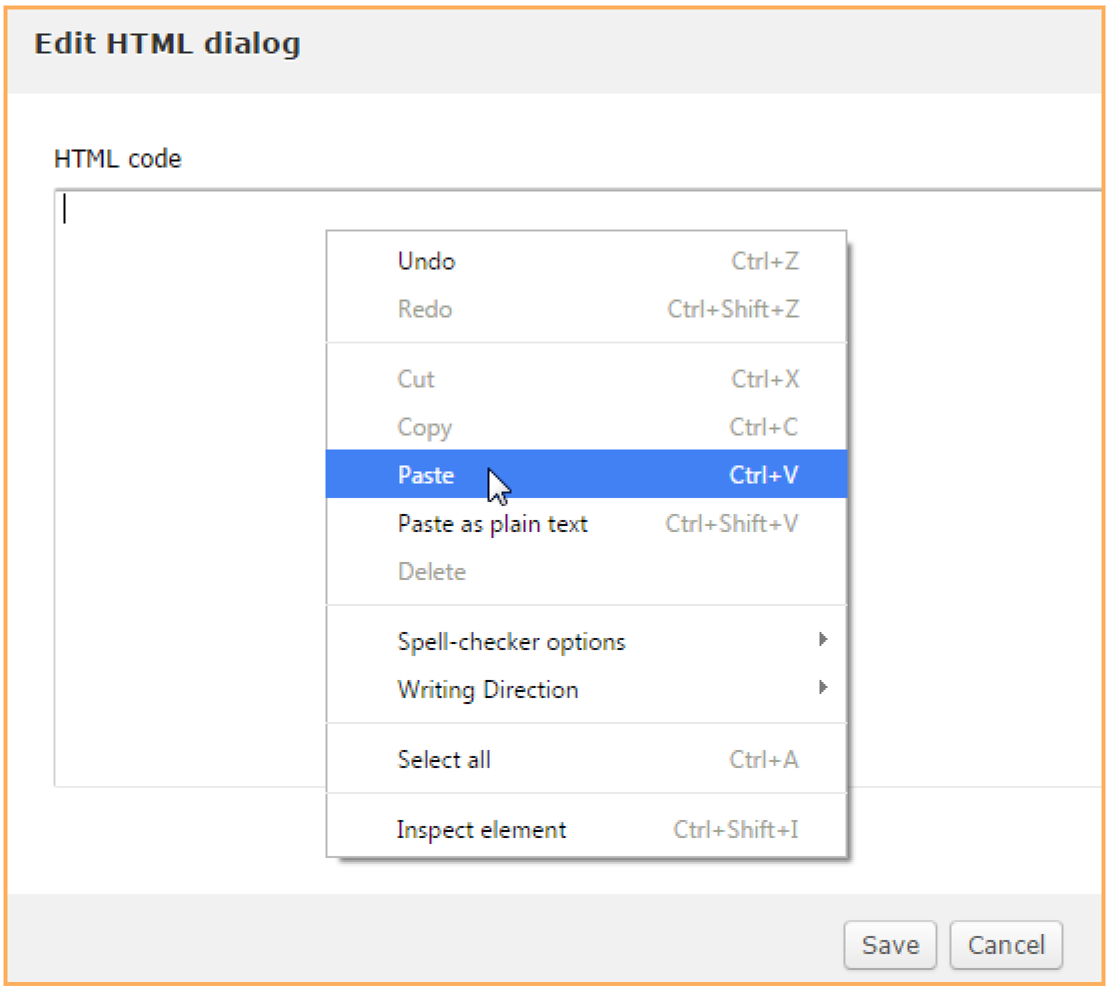
When a layout cell or placeholder is empty, a **Drop gadget or layout here** prompt will be displayed. When you drag a gadget over an empty layout cell or placeholder, it turns green, indicating that you can drop the gadget there. When you drag a gadget above or below a layout, a prompt will appear indicating that you can drop the gadget before or after the layout.

5. After you have inserted the gadget, hover over it and click the **Settings** icon.

6. Within the gadget settings on the left, click the **Edit code** button.



7. In the dialog that appears, paste the embed code then click the **Save** button.



Your Twitter feed should now appear on your page.

Instead of creating a custom HTML gadget, you can use the Snippet feature to embed the code within a content gadget. For more information on using the Snippet feature, see Inserting and modifying HTML or JavaScript.

On this page:

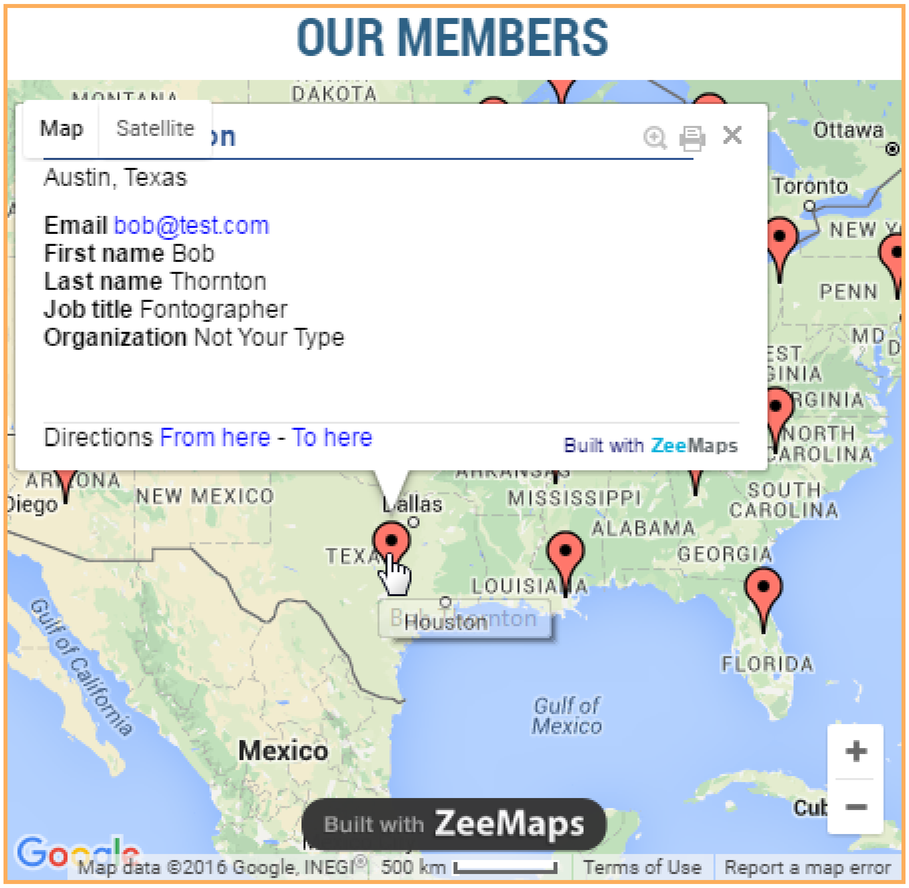
Expand all sections

Adding interactive ZeeMaps

Adding interactive ZeeMaps

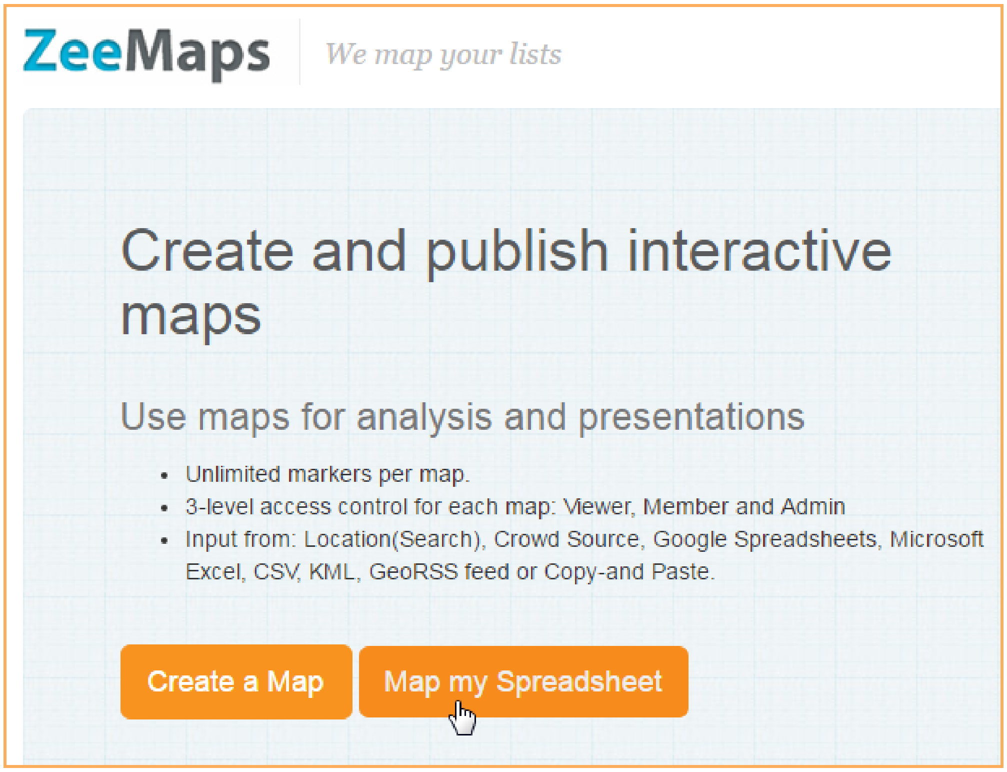
> ⚠ Instructions for third-party services like this are provided as a courtesy and may contain out of date information or screen clips. For the latest instructions, consult the third party's website.

ZeeMaps are interactive maps that you can use to show where your members are located, and optionally, to provide contact information.

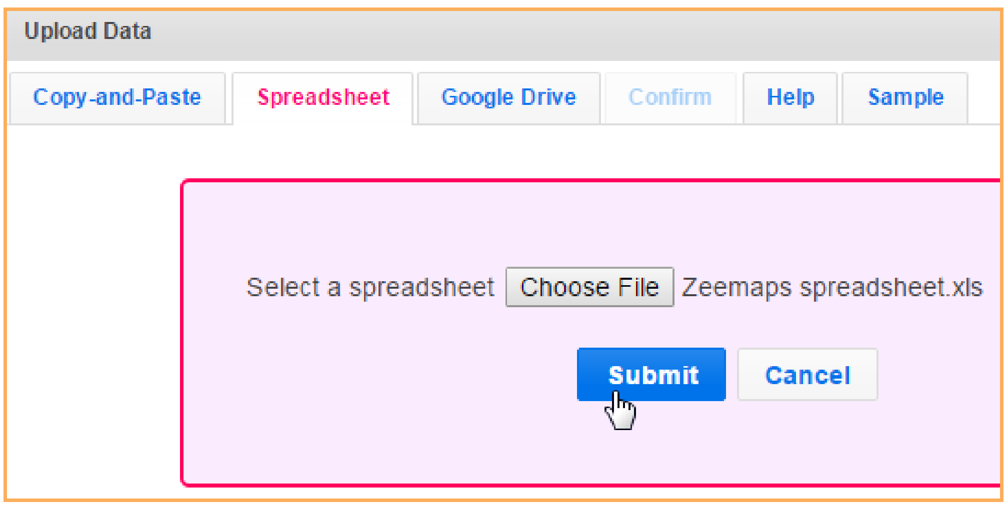


To embed a ZeeMap into a site page on your Wild Apricot, follow these steps:

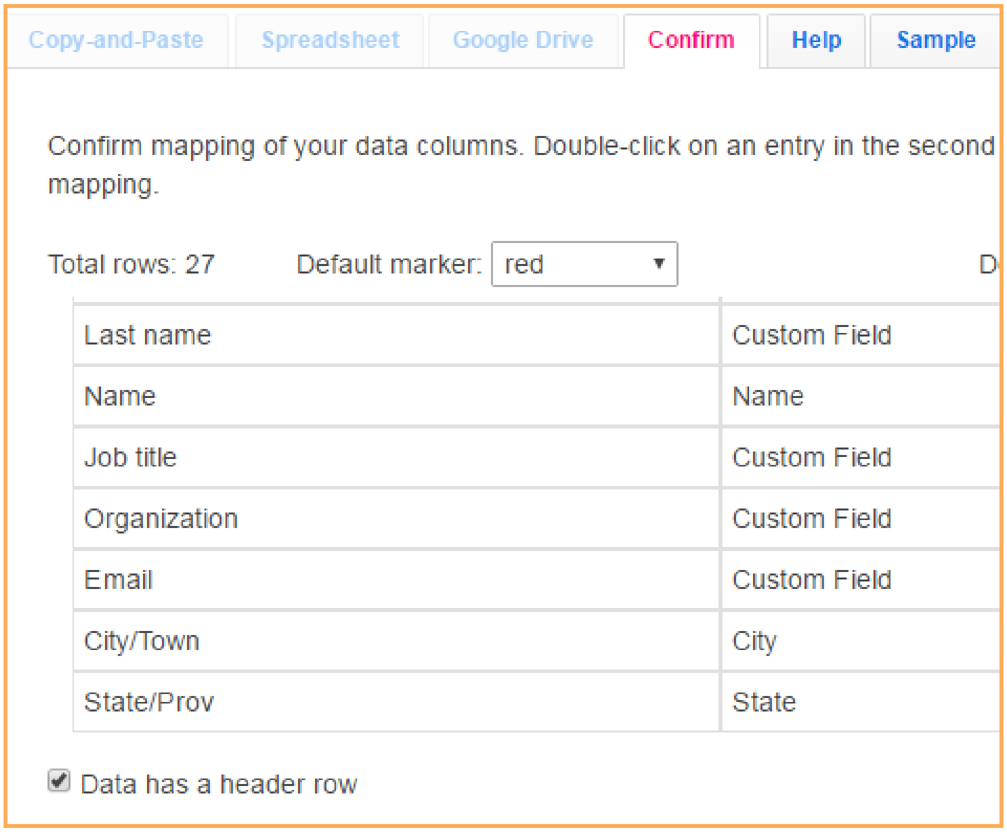
1. Export your Wild Apricot contact database to a spreadsheet.
2. Open the spreadsheet file in a spreadsheet program (like Excel or Google Sheets) and remove columns you don't want to include in your map. Your spreadsheet should include at least one column containing geographical information such as city, state, country, and/or address.
3. Go to zeemaps.com and click **Map my Spreadsheet**.



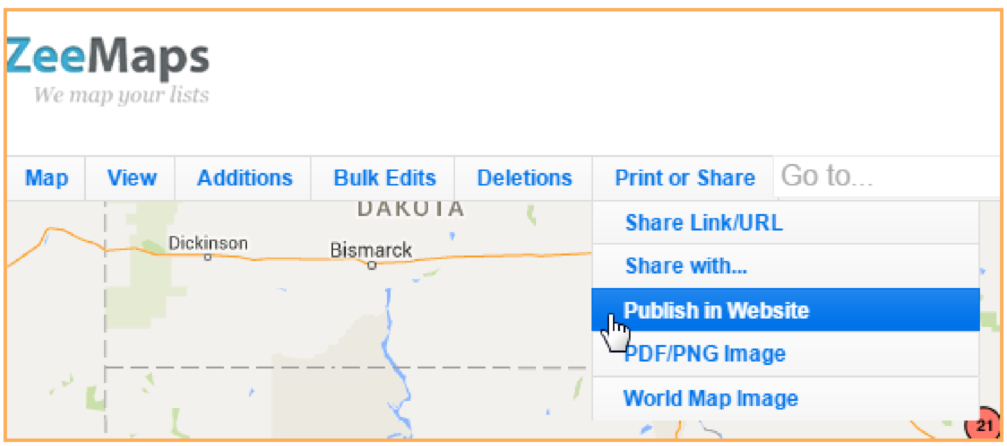
4. Click **Choose File** and find your spreadsheet on your computer or network.
5. Click **Submit** to upload your spreadsheet.



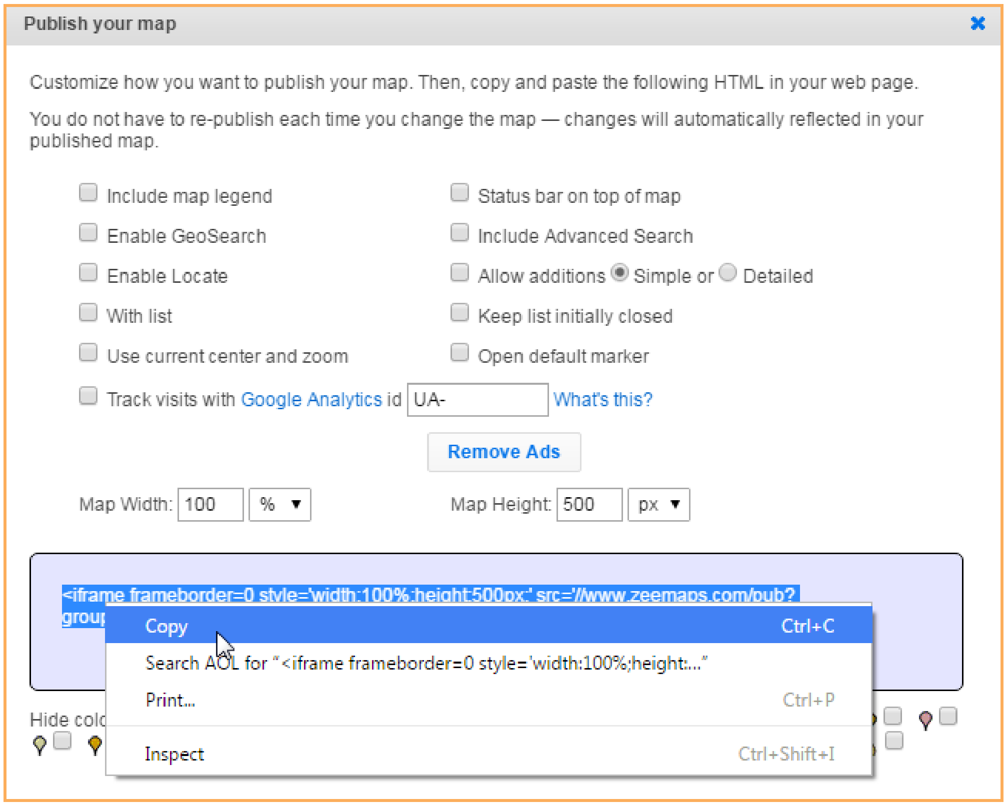
6. Select your default country and confirm the mapping of your spreadsheet columns. Geographical fields like city, state, country, and address should be automatically mapped. Any other fields should appear as **Custom Field**.



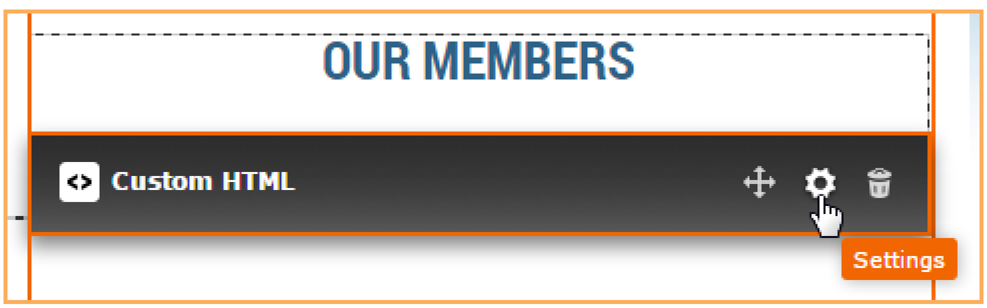
7. After you confirm the mapping of your column, click the **Submit** button. Your map should now appear, though your data take a little while to appear depending on site traffic.
8. Just above your map, hover over the **Print or Share** menu and select the **Publish in Website** option.



9. From the window that appears, you can choose your map options or allow them to default.
10. Within the blue box below the map options, copy the embed code.



11. Log in to your Wild Apricot site as an administrator.
12. Go to **Sites pages** (under the **Website** menu) and begin editing the site page or page template where you want the map to appear.
13. Click the **Gadgets** icon to display the list of available gadgets.
14. Drag the custom HTML gadget from the Gadget list, and drop it in the desired location.
15. After you have inserted the gadget, hover over it and click the **Settings** icon.



16. Within the gadget settings on the left, click the **Edit code** button.
17. In the dialog that appears, paste the embed code then click the **Save** button.
18. Click **Save** to save the changes to your page.

Your ZeeMap should now appear on your page or template. Though ZeeMaps are free, ads will appear below your map unless you choose to pay a fee or buy a membership.

Instead of creating a custom HTML gadget, you can use the Snippet feature to embed the code within a content gadget. For more information on using the Snippet feature, see Inserting and modifying HTML or JavaScript.

Embedding external photo galleries

Embedding external photo galleries

Instructions for third-party services like these are provided as a courtesy and may contain out of date information or screen clips. For the latest instructions, consult the third party's website.

You can add a photo gallery to your Wild Apricot site using a photo album gadget. The photo album gadget displays pictures stored in your Wild Apricot account. If you want to display photos stored on dedicated photo-sharing sites such as Instagram, Photobucket or Flickr, you can add custom HTML code to embed an external photo gallery in a page on your Wild Apricot site.

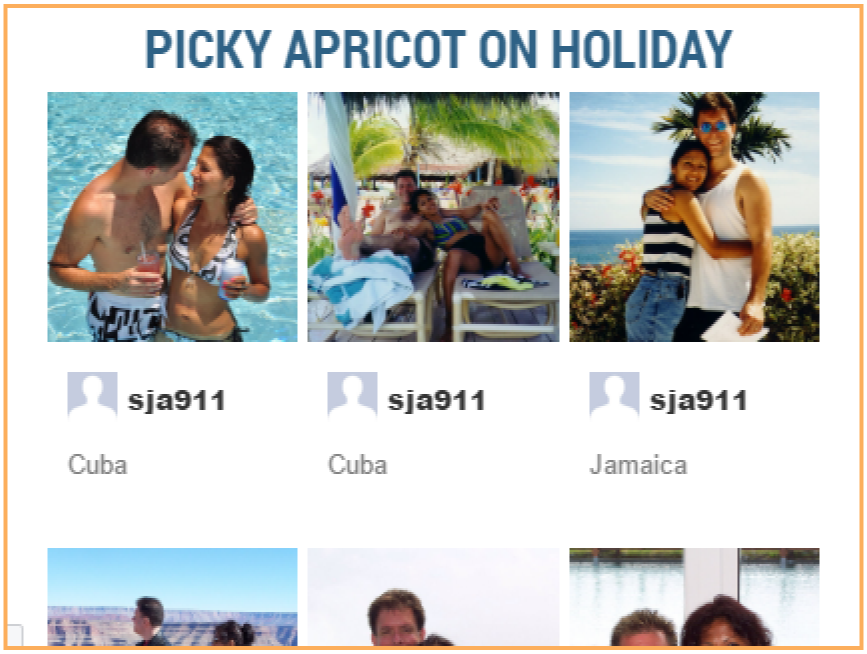
You can insert code to embed a photo gallery into a custom HTML gadget or content gadget on a page or page template.

For an overview of the most popular photo-sharing sites, see our blog post on photo-sharing.

Embedding Instagram photos

You can embed photos from your Instagram account so that they appear on a page on your Wild Apricot site.

Read more/less



Using one of the third-party widgets available from SnapWidget, the photos can appear as:

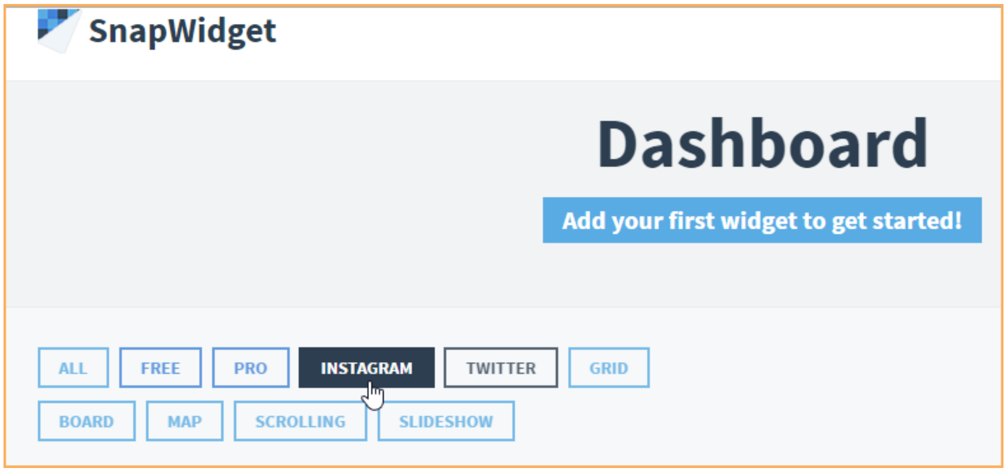
- a grid
- a grid with user name and comments
- a map pinned with photo locations
- a slideshow
- a scrolling banner

You can use the free versions of these widgets, or pay for the Pro version which offers additional features and settings.

To add Instagram photos to a Wild Apricot site page using a SnapWidget widget, follow these steps:

1. Go to SnapWidget and click the **Get Started Today** button.
2. Sign up for a free SnapWidget account or log into your existing account.
3. From the SnapWidget dashboard, scroll down then click the **Browse All Widgets** button.

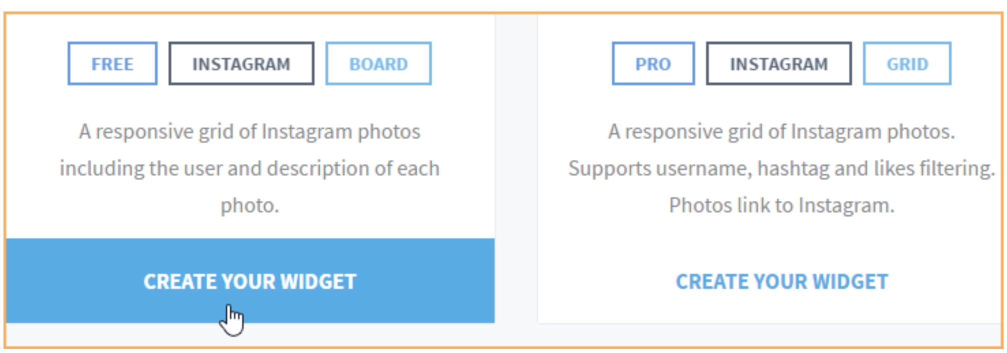
4. With all the widgets displayed, click the **Instagram** option towards the top.



5. With all the Instagram widgets now displayed, choose how you want to display your photos by clicking **Create your widget** belo w one of the following options:

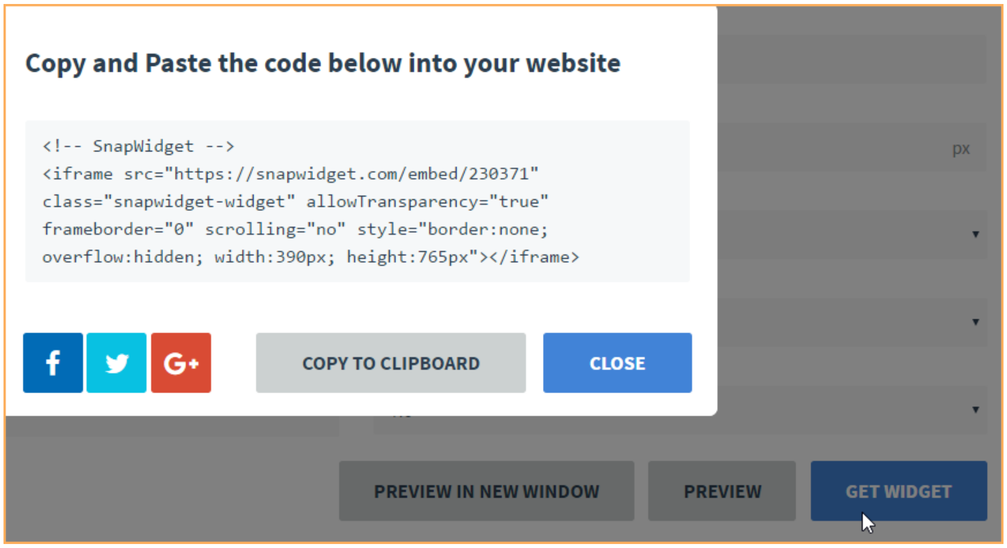
Button	To display photos as:
Grid	Grid
Board	Grid with user name and comments
Map	Map pinned with photo locations
Slideshow	Slideshow
Scrolling	Scrolling banner

Each option is available in both Free and Pro versions.

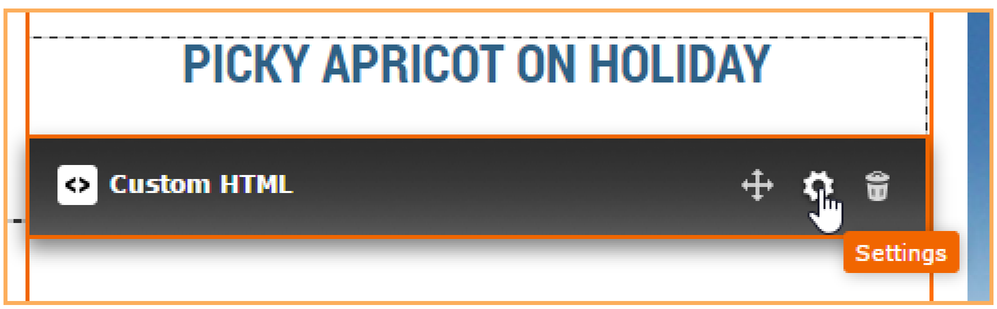


6. Scroll down to the basic settings for your widget and click on the **Username** field. You will be prompted to sign into your Instagram account.
7. Adjust the rest of the settings as you wish. The description will not appear on your Wild Apricot page; it will just be used to

identify your widget within your SnapWidget account.
8. After you're finished adjusting your settings, you can click the **Preview** button to preview your widget. Once you are satisfied with the results, click **Get Widget** to get the embed code.
9. Within the window that appears, click **Copy to clipboard** to copy the embed code to your clipboard.



10. Log in to your Wild Apricot site as an administrator.
11. Go to **Sites pages** (under the **Website** menu) and begin editing the site page or page template where you want your photos to appear.
12. Click the **Gadgets** icon to display the list of available gadgets.
13. Drag the custom HTML gadget from the Gadget list, and drop it in the desired location.
14. After you have inserted the gadget, hover over it and click the **Settings** icon.



15. Within the gadget settings on the left, click the **Edit code** button.
16. In the dialog that appears, paste the embed code then click the **Save** button.
17. Click **Save** to save the changes to your page.

Your Instagram photos should now appear on your page or template.

> Instead of creating a custom HTML gadget, you can use the Snippet feature to embed the code within a content gadget. For more information on using the Snippet feature, see Inserting and modifying HTML or JavaScript.

Embedding PhotoBucket albums

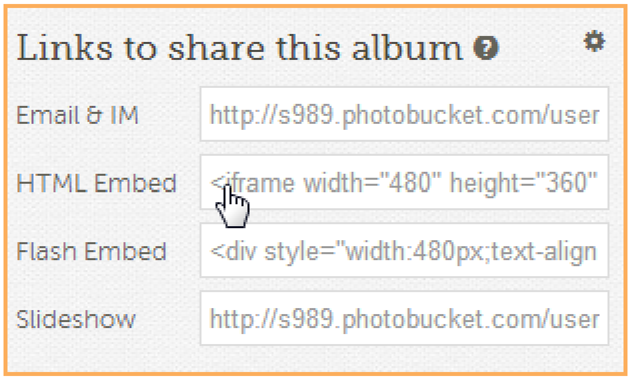
> PhotoBucket currently does not support https, so Photobucket albums cannot be embedded on pages accessed using https.

To embed a slideshow of photos from an album in your PhotoBucket account, follow these steps:

Read more/less

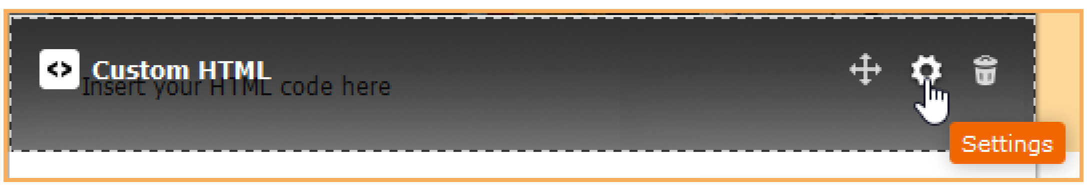
1. Sign into your Photobucket account (or create a new one) at photobucket.com.

2. Go to your library, and display the photo album you want to use.
3. In the **Links to share this album** panel along the right, copy the **HTML Embed** code.

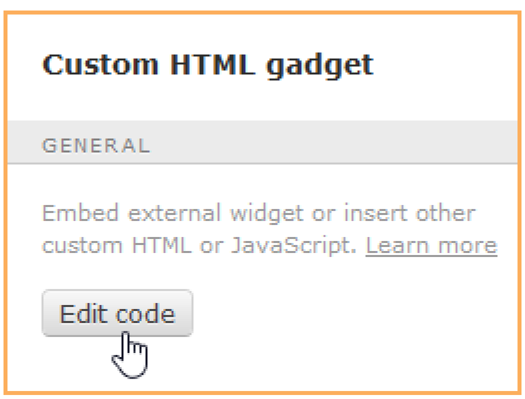


4. Sign into your Wild Apricot site as an administrator, then go to **Sites pages** (under the **Website** menu) and begin editing the site page or page template where you want the slideshow to appear.
5. Click the **Gadgets** icon to display the list of available gadgets.
6. Drag the custom HTML gadget from the Gadget list, and drop it on the desired location.

7. After you have inserted the gadget, hover over it and click the **Settings** icon.



8. Within the gadget settings on the left, click the **Edit code** button.



9. In the dialog that appears, paste the code you copied from the Photobucket site.
10. Click the **Save** button to exit the dialog and save your changes.
11. Click the **Save** button to save your changes to the page.

The slideshow should now appear on your page. If it does not, switch to public view.

Embedding other photo galleries

Embedding other photo galleries involves the same basic steps:
Read more/less

1. Finding and copying the embed code.
2. Pasting the embed code into a custom HTML gadget, or into a content gadget using the Snippet feature.

> iOS devices – including iPads – do not provide native support for Flash, so avoid embedding any galleries that use Flash if you want your users to view your site on iOS devices.

On this page:

- Embedding Instagram photos
- Embedding PhotoBucket albums
- Embedding other photo galleries

Expand all sections

Adding video clips

Adding video clips

Wild Apricot allows you to embed video clips from sites like YouTube, Vimeo, Veoh, or Flickr on your Wild Apricot pages. You can also embed videos stored on your Wild Apricot site.

> You cannot embed videos into email messages.

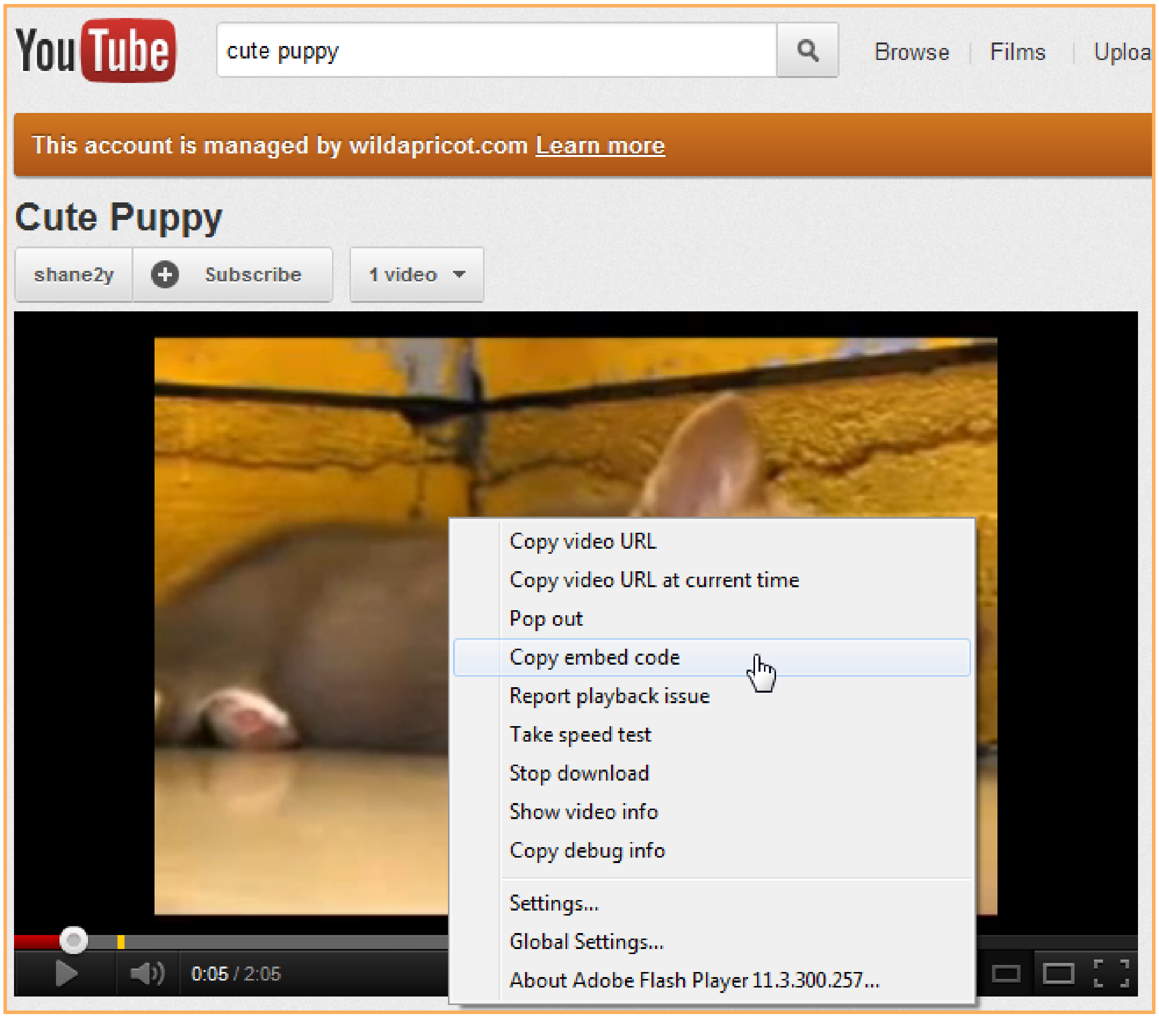
Embedding clips from video sites

> Instructions for third-party services like these are provided as a courtesy and may contain out of date information or screen clips. For the latest instructions, consult the third party's website.

YouTube

To embed videos stored on YouTube, follow these steps:
Read more/less

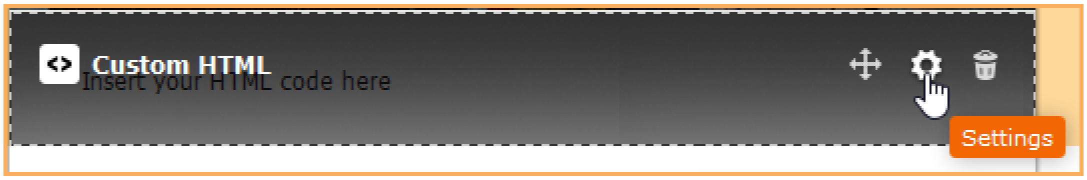
1. Go to YouTube.
2. Find the video you want to embed and click on it. YouTube will start loading the video.
3. Right click over the video and select the **Copy embed code** option.



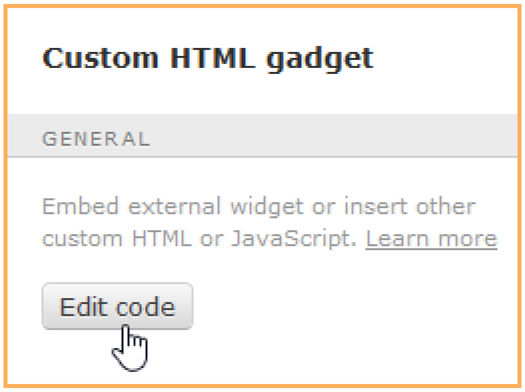
4. In your Wild Apricot account, go to **Sites pages** (under the **Website** menu) and begin editing the site page or page template whe re you want to add the video.
5. Click the **Gadgets** icon to display the list of available gadgets.
6. Drag the custom HTML gadget from the Gadget list, and drop it on the desired location.

When a layout cell or placeholder is empty, a **Drop gadget or grid here** prompt will be displayed. When you drag a gadget over an empty layout cell or placeholder, it turns green, indicating that you can drop the gadget there. When you drag a gadget above or below a layout, a prompt will appear indicating that you can drop the gadget before or after the layout.

7. After you have inserted the gadget, hover over it and click the **Settings** icon.



8. Within the gadget settings on the left, click the **Edit code** button.



9. In the dialog that appears, paste the embed code for the video.
10. Click the **Save** button to exit the dialog.
11. Click the **Save** button to save your changes to the page.

The video should now appear on your site page. Switch to public view if the video does not immediately appear.

The video does not appear in public view, check the following:

- Make sure that your browser has the Flash plugin is installed
- Check your internet connection and speed

For more detailed instructions on how to place the YouTube video link, go to: http://youtube.com/sharing.

> If you encounter a problem with YouTube videos covering up fly-out menu options, add *?wmode=opaque* to the end of the URL in the embed code.

Other services

There are many other similar services, including:

- Vimeo
- Veoh
- Flickr

For instructions on obtaining the embed codes for videos from these services, see their websites.

Embedding clips stored on your Wild Apricot site

You can embed videos – webinars, for example – stored on your Wild Apricot site. You can embed MP4 files and AVI files, but not WMV files.

> Visitors to your site may need to download and install browser-specific plugins to view your videos.

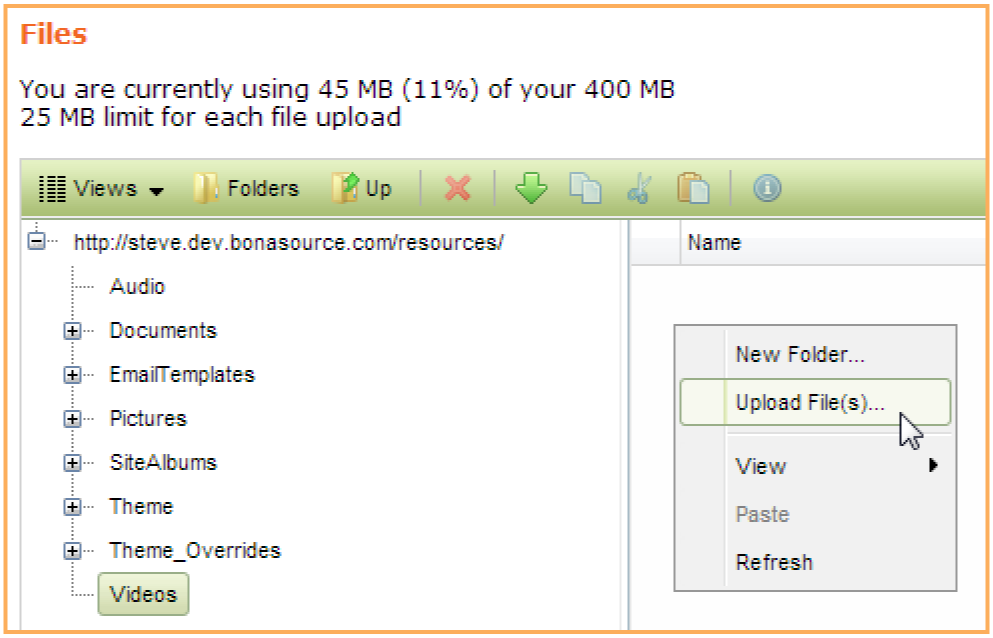
Uploading the video file

The first step in embedding video on your site is to upload your video file to your Wild Apricot account.
Read more/less

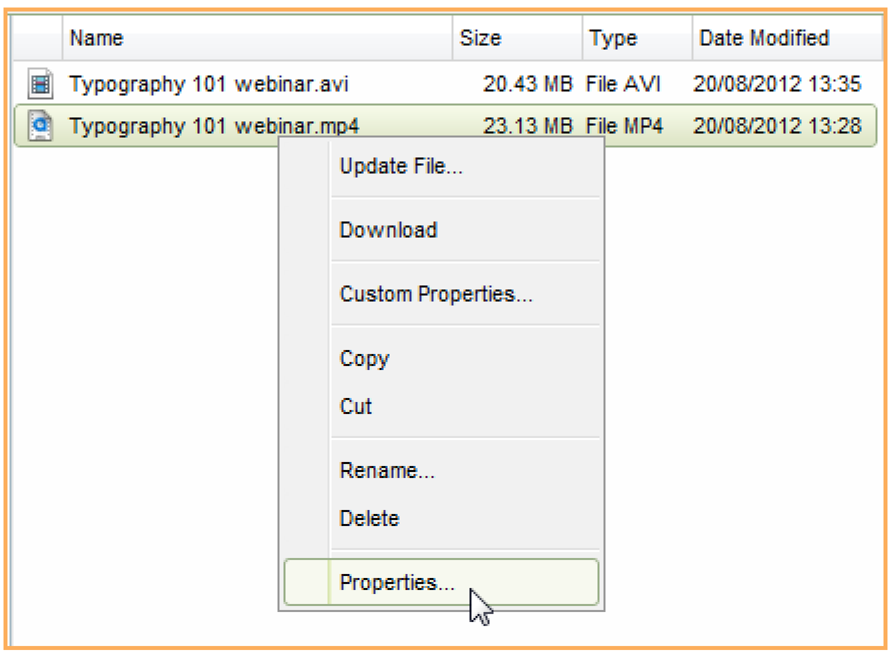
> Uploaded video files will count against your file upload limit. You can also link to video files stored on another site – you just

need to know the URL of the file.

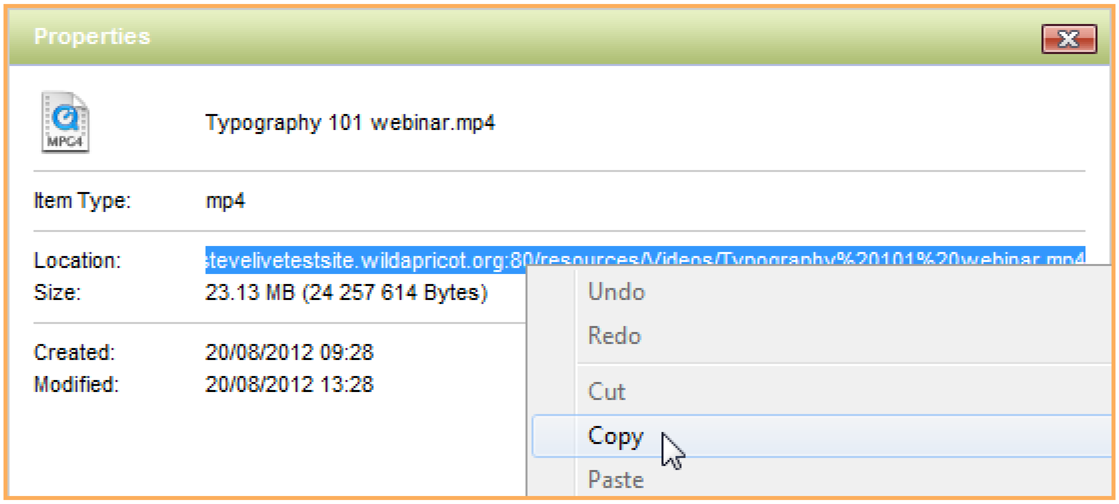
To upload your video file, go to the Files screen by clicking **Files** under the **Website** menu. Your should create a separate Videos folder to organize your files.



After you've uploaded your video file, you need to know its location or URL. Right click over the video file in the Videos folder and select **P roperties** from the menu that appears.



Within the Properties window, select the entire file location then right click and select the **Copy** option.



The URL of the uploaded video file has now been copied to the clipboard. You should now paste it to a temporary location such as Notepad since we're going to be copying some other code as well.

Adding the code to embed the video

Now that you've uploaded your video file and copied its location, you add HTML code to embed the video – that is, display a player and play the file.

> ⚠ The code shown below works in all modern browsers (Internet Explorer 9 and above).

To add the code to embed the video, follow these steps:

Read more/less

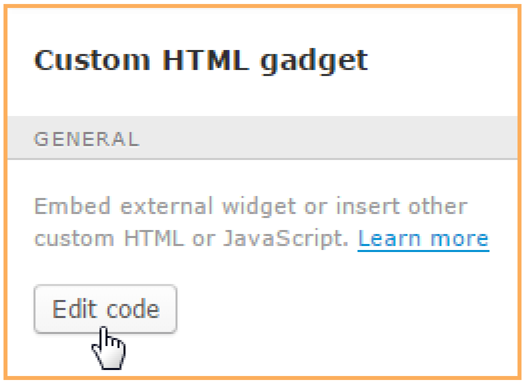
1. Copy and paste the following code to the clipboard.

```
<video width="640"  height="360" src="video_file_URL" controls preload>
Your browser does not support the video tag.
</video>
```

2. In your Wild Apricot account, go to **Sites pages** (under the **Website** menu) and begin editing the site page or page template where you want to add the video.
3. Click the **Gadgets** icon to display the list of available gadgets.
4. Drag the custom HTML gadget from the Gadget list, and drop it on the desired location.

When a layout cell or placeholder is empty, a **Drop gadget or layout here** prompt will be displayed. When you drag a gadget over an empty layout cell or placeholder, it turns green, indicating that you can drop the gadget there. When you drag a gadget above or below a layout, a prompt will appear indicating that you can drop the gadget before or after the layout.

5. After you have inserted the gadget, click the **Edit code** button within the page settings on the left.



6. In the dialog that appears, paste the embed code for the video.
7. Within the pasted code, replace *video_file_URL* with the URL of your video file (which you copied earlier).
8. To have the video played automatically, include the *autoplay* attribute, for example:

```
<video width="640"  height="360" src="abc.mp4" controls autoplay>
Your browser does not support the video tag.
</video>
```

9. For a list of other attributes you can include, click here.
10. Click the **Save** button to save your code changes.
11. Click the **Save** button to save your changes to the page.

On this page:

Expand all sections

Adding Flash animations to your site

Adding Flash animations to your site

Flash is a software technology for creating interactive animations. You can add Flash animations to your Wild Apricot site to provide a dynamic experience for your visitors.

⚠ Visitors to your site will need to have a Flash player plugin installed on their browser to view Flash animations.

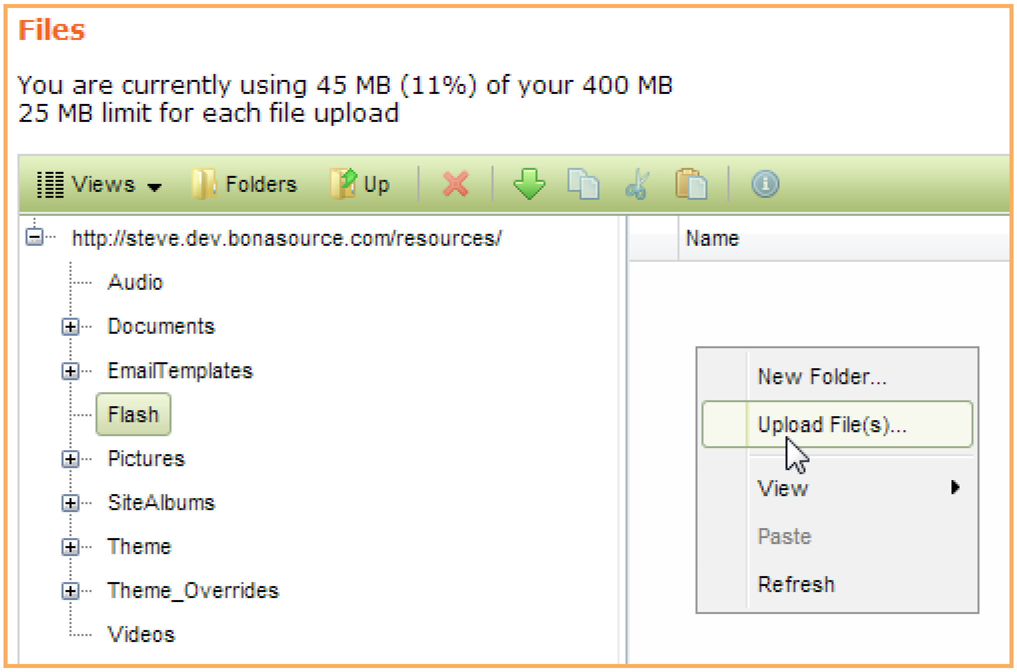
Flash files typically use the .swf extension, though other extensions are used as well.

Uploading and embedding Flash files

To add a Flash animation to your Wild Apricot site, follow these steps:

Read more/less

1. Go to the Files screen – by clicking **Files** under the **Website** menu – and upload your Flash file. You should create a separate folder to store your Flash files.

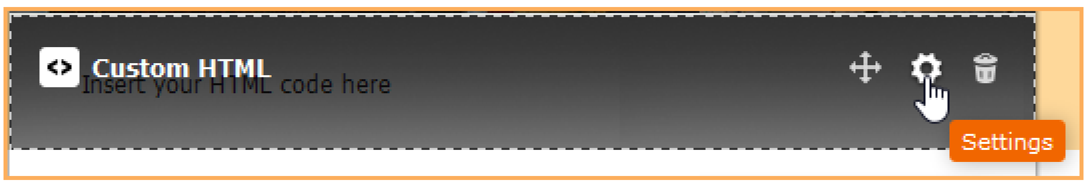


2. Copy the following code to the clipboard.

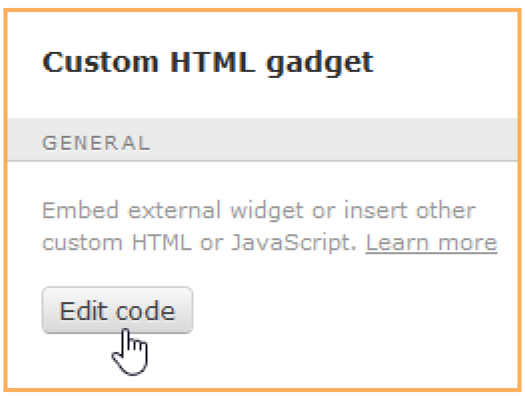
```
<object
codebase="http://download.macromedia.com/pub/shockwave/cabs/flash/swflash.c
ab#version=6,0,0,0"
classid="clsid:D27CDB6E-AE6D-11cf-96B8-444553540000" width="500"
height="500">
<param name="Src" value="/resources/flash/myflash.swf">
<param name="WMode" value="Transparent">
<param name="Play" value="true">
<param name="Loop" value="false">
<param name="Quality" value="High">
<param name="Menu" value="false">
<param name="AllowScriptAccess" value="">
<param name="Scale" value="ShowAll">
<param name="DeviceFont" value="false">
<param name="AllowNetworking" value="all">
<embed type="application/x-shockwave-flash"
pluginspage="http://www.macromedia.com/go/getflashplayer"
src="/resources/flash/myflash.swf" wmode="Transparent" play="true"
loop="false" quality="High" menu="0" scale="ShowAll" devicefont="0"
allownetworking="all" width="500" height="500">
</object>
```

3. Go to **Sites pages** (under the **Website** tab) and begin editing the site page or page template where you want to add the Flash animation.
4. Click the **Gadgets** icon to display the list of available gadgets.
5. Drag the custom HTML gadget from the Gadgets list, and drop it on the desired location.

When a layout section or placeholder is empty, a **Drop gadget or grid here** prompt will be displayed. When you drag a gadget over an empty layout section or placeholder, it turns green, indicating that you can drop the gadget there. When you drag a gadget above or below a layout, a prompt will appear indicating that you can drop the gadget before or after the layout.
6. After you have inserted the gadget, hover over it and click the **Settings** icon.



7. Within the gadget settings on the left, click the **Edit code** button.



8. In the dialog that appears, paste the code you copied earlier.
9. Within the pasted code, replace the two occurrences of **myFlash.swf** with the name of your Flash file. If you saved the file to a folder other than a Flash folder, then replace **flash** with the name of the folder. If you didn't create a subfolder for the file, remove **/flash** entirely.on the Files screen, then include the directory name.
10. Within the code, change the two sets of **width** and **height** parameters to match the dimensions of your animation.
11. Click the **Save** button to your code changes.
12. Click the **Save** button to save your changes to the page.

The Flash animation should now appear on your page. If it does not, switch to public view.

> Instead of creating a custom HTML gadget to embed the animation, you can use the Snippet feature to embed it within a content gadget. For more information on using the Snippet feature, see Inserting and modifying HTML or JavaScript.

Optional settings

The following attributes are optional when defining the object and/or embed tags.

Read more/less

For an object, all attributes are defined in param tags unless otherwise specified. When inserting a new attribute please look at the *quality* attribute in the code above. You should add a new PARAM tag line **and** a new attribute to the OBJECT tag.

- **id** (attribute for object, object only) - Identifies the flash file to the host environment (eg the web browser) so that it can be referenced using a scripting language.
- **name** (embed only) - flash file name. Identifies the flash file to the host environment (a web browser, typically) so that it can be referenced using a scripting language such as JavaScript or VBScript.
- **swliveconnect** - Possible values: *true*, *false*. Specifies whether the browser should start Java when loading the Flash Player for the first time. The default value is false if this attribute is omitted. If you use JavaScript and Flash on the same page, Java must be running for the FSCommand to work.
- **play** - Possible values: *true, false*. Specifies whether the flash file begins playing immediately on loading in the browser. The default value is true if this attribute is omitted.
- **loop** - Possible values: *true, false*. Specifies whether the flash file repeats indefinitely or stops when it reaches the last frame. The default value is true if this attribute is omitted.
- **menu** - Possible values: *true, false*.
    - *true* displays the full menu, allowing the user a variety of options to enhance or control playback.
    - *false* displays a menu that contains only the Settings option and the About Flash option.
- **quality** - Possible values: *low, high, autolow, autohigh, best.*** low* favors playback speed over appearance and never uses anti-aliasing.
    - *autolow* emphasizes speed at first but improves appearance whenever possible. Playback begins with anti-aliasing turned off. If the Flash Player detects that the processor can handle it, anti-aliasing is turned on.
    - *autohigh* emphasizes playback speed and appearance equally at first but sacrifices appearance for playback speed if necessary. Playback begins with anti-aliasing turned on. If the actual frame rate drops below the specified frame rate, anti-aliasing is turned off to improve playback speed. Use this setting to emulate the View > Antialias setting in Flash.
    - *medium* applies some anti-aliasing and does not smooth bitmaps. It produces a better quality than the Low setting, but lower quality than the High setting.
    - *high* favors appearance over playback speed and always applies anti-aliasing. If the flash file does not contain animation, bitmaps are smoothed; if the flash file has animation, bitmaps are not smoothed.
    - *best* provides the best display quality and does not consider playback speed. All output is anti-aliased and all bitmaps are smoothed.
- **scale** - Possible values: *showall, noborder, exactfit*.
    - default (*showall*) makes the entire flash file visible in the specified area without distortion, while maintaining the original aspect ratio of the flash file. Borders may appear on two sides of the flash file.
    - *noorder* scales the flash file to fill the specified area, without distortion but possibly with some cropping, while maintaining the original aspect ratio of the flash file.
    - *exactfit* makes the entire flash file visible in the specified area without trying to preserve the original aspect ratio. Distortion may occur.
- **align** (attribute for Object) - Possible values: *l, t, r, b*.
    - Default centers the flash file in the browser window and crops edges if the browser window is smaller than the flash file.
    - l (left), r (right), t (top), and b (bottom) align the flash file along the corresponding edge of the browser window and crop the remaining three sides as needed.
- **salign** - Possible values: l, t, r, b, tl, tr, bl, br.
    - *l*, *r*, *t*, and *b* align the flash file along the left, right, top or bottom edge, respectively, of the browser window and crop the remaining three sides as needed.
    - *tl* and *tr* align the flash file to the top left and top right corner, respectively, of the browser window and crop the bottom and remaining right or left side as needed.
    - *bl* and *br* align the flash file to the bottom left and bottom right corner, respectively, of the browser window and crop the top and remaining right or left side as needed.
- **wmode** - Possible values: *window, opaque, transparent*. Sets the Window Mode property of the flash file for transparency, layering, and positioning in the browser.
    - *window* - flash file plays in its own rectangular window on a web page.
    - *opaque* - the flash file hides everything on the page behind it.
    - *transparent* - the background of the HTML page shows through all transparent portions of the flash file, this may slow animation performance.
- **bgcolor** - [hexadecimal RGB value] in the format #RRGGBB . Specifies the background color of the flash file. Use this attribute to override the background color setting specified in the Flash file. This attribute does not affect the background color of the HTML page.
- **base** - . or [base directory] or [URL]. Specifies the base directory or URL used to resolve all relative path statements in the Flash Player flash file. This attribute is helpful when your Flash Player files are kept in a different directory from your other files.
- **flashvars** - Possible values: variable to pass to Flash Player. Requires Macromedia Flash Player 6 or later.
    - Used to send root level variables to the flash file. The format of the string is a set of name=value combinations

separated by '&'.
- Browsers will support string sizes of up to 64KB (65535 bytes) in length.

On this page:

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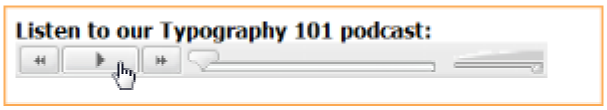
Embedding audio on your site

Embedding audio on your site

You can embed audio such as music or a podcast on your Wild Apricot site. Visitors to your site can listen to it without needing an external player like QuickTime or Windows Media Player.



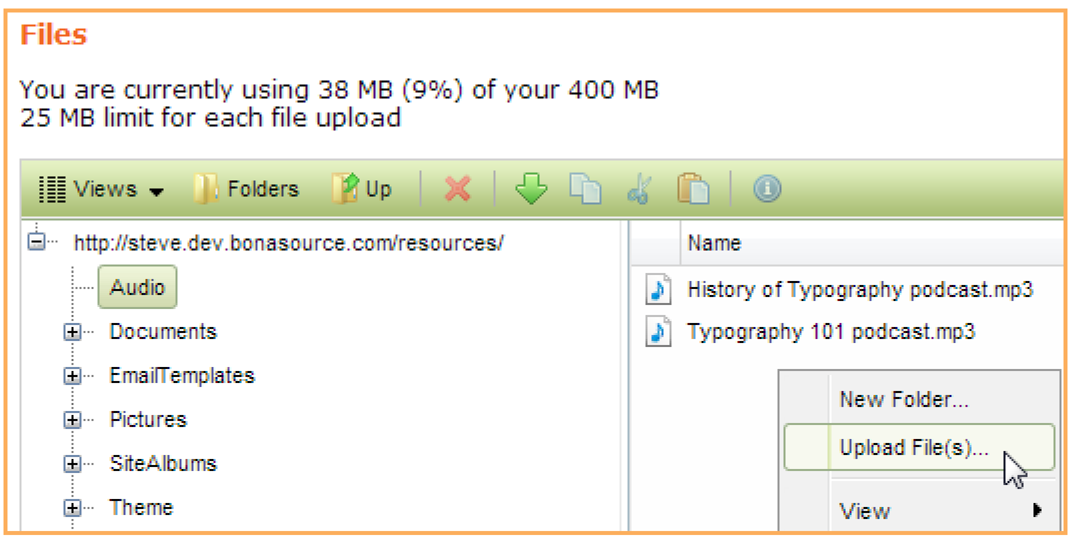
Uploading your audio

The first step in embedding audio on your site is to upload your audio file to your Wild Apricot account.

Read more/less

Uploaded audio files will count against your file upload limit. You can also link to audio files stored on another site – you just need to know the URL of the file.

To upload your audio file, go to the Files screen by clicking **Files** under the **Website** menu. Your should create a separate Audio folder to organize your files, then upload your audio file to the folder.



Adding the code to embed the audio

Now that you've uploaded your audio file and copied its location, you add HTML code to display a player and play the file. You have two choices for the embed code:

- code that works for all browsers but requires the visitor to install a browser plugin to see the player and play the audio
- code that does not require a plugin but does not work on Internet Explorer 8

Code that requires a browser plugin

The following embed code may require visitors to your site may be required to install browser-specific plugins to see the player and play the audio.

Read more/less

To add the code to embed the audio, follow these steps:

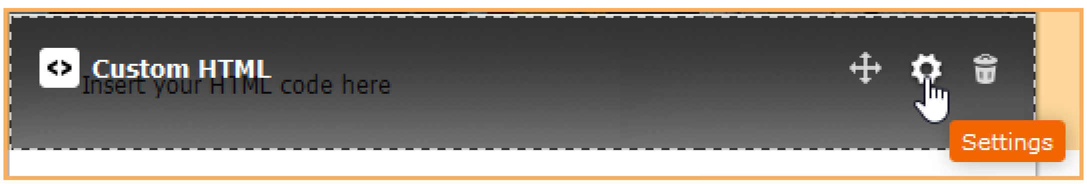
1. Copy and paste the following code to the clipboard.

```
<embed height="42" type="audio/mpeg" width="300" src="MP3_FILE_URL"
autostart="false" loop="false" controller="true" bgcolor="#FFFFFF">
```

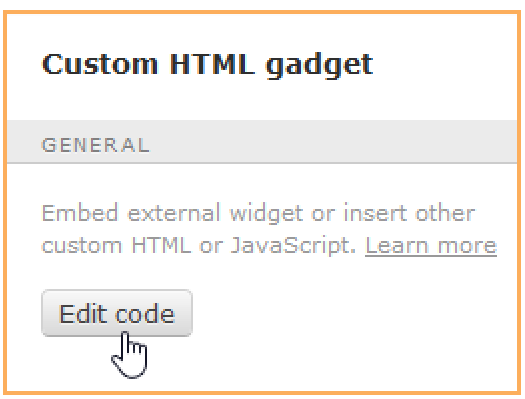
2. In your Wild Apricot site, go to **Sites pages** (under the **Website** menu) and begin editing the site page or page template where you want to embed the audio.
3. Click the **Gadgets** icon to display the list of available gadgets.
4. Drag the custom HTML gadget from the Gadget list, and drop it on the desired location.

When a layout cell or placeholder is empty, a **Drop gadget or layout here** prompt will be displayed. When you drag a gadget over an empty layout cell or placeholder, it turns green, indicating that you can drop the gadget there. When you drag a gadget above or below a layout, a prompt will appear indicating that you can drop the gadget before or after the layout.

5. After you have inserted the gadget, hover over it and click the **Settings** icon.



6. Within the gadget settings on the left, click the **Edit code** button.



7. In the dialog that appears, paste the embed code for the audio.
8. Within the pasted code, replace **MP3_FILE** with the name of the MP3 file. If you saved the file to a subdirectory on the Files screen, then include the directory name. For example, if you saved podcast.mp3 to an Audio directory, you would enter:

```
"Resources/audio/podcast.mp3"
```

9. To have the audio played automatically, change:

```
autostart="false"
```

to

```
autostart="true"
```

> On some browsers, the autostart setting may be ignored.

10. Click the **Save** button.
11. Click the **Save** button to save your changes to the page.

> Instead of creating a custom HTML gadget to embed the audio, you can use the Snippet feature to embed the audio within a content gadget. For more information on using the Snippet feature, see Inserting and modifying HTML or JavaScript.

Code that does not require a browser plugin

The following embed code does not require a browser plugin to be installed, but does not work on Internet Explorer 8.
Read more/less

To add the code to embed the audio, follow these steps:

1. Copy and paste the following code to the clipboard.

```
<audio controls="controls">
<source src="MP3_FILE_URL"></audio>
```

2. In your Wild Apricot site, go to **Sites pages** (under the **Website** menu) and begin editing the site page or page template where you want to embed the audio.
3. Click the **Gadgets** icon to display the list of available gadgets.
4. Drag the custom HTML gadget you want to insert from the Gadget list, and drop it on the desired location.
5. After you have inserted the gadget, hover over it and click the **Settings** icon.
6. Within the gadget settings on the left, click the **Edit code** button.
7. In the dialog that appears, paste the embed code for the audio.
8. Within the pasted code, replace **MP3_FILE** with the name of the MP3 file. If you saved the file to a subdirectory on the Files screen, then include the directory name. For example, if you saved podcast.mp3 to an Audio directory, you would enter:

```
"Resources/audio/podcast.mp3"
```

9. Click the **Save** button.
10. Click **Save** to save your changes to the page.

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Setting up an online store

Setting up an online store

Wild Apricot does not currently provide support for ecommerce or online stores. You can, however, add an online store to your Wild Apricot site using code provided by third parties such as Ecwid or Shopify.

> ⚠ Purchases made using third-party online stores will not be recorded in your Wild Apricot database.

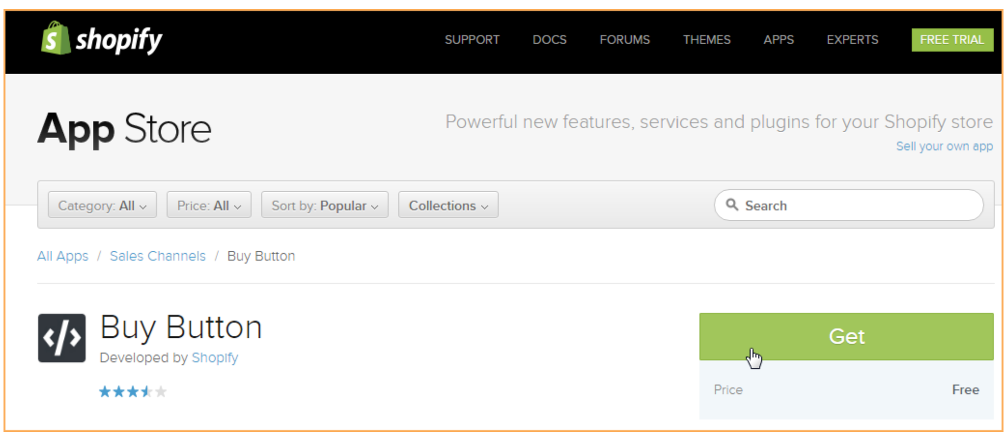
Using Shopify

You can embed a product or collection from your Shopify store onto a page in your Wild Apricot site.

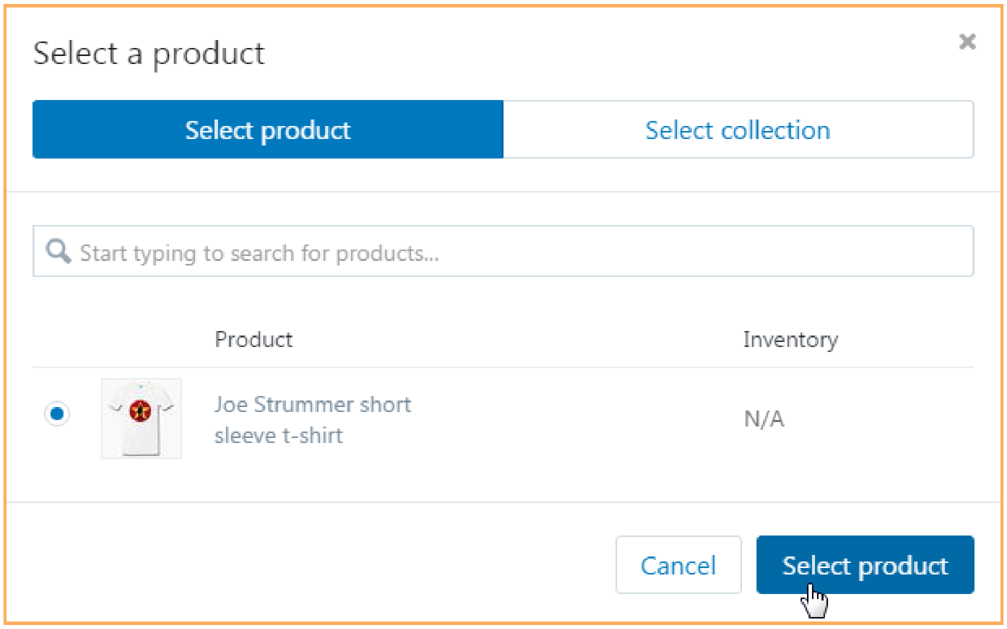
Shopify charges a monthly fee and a per transaction fee, and provides a 14-day free trial.

To embed a Shopify product or collection, follow these steps:

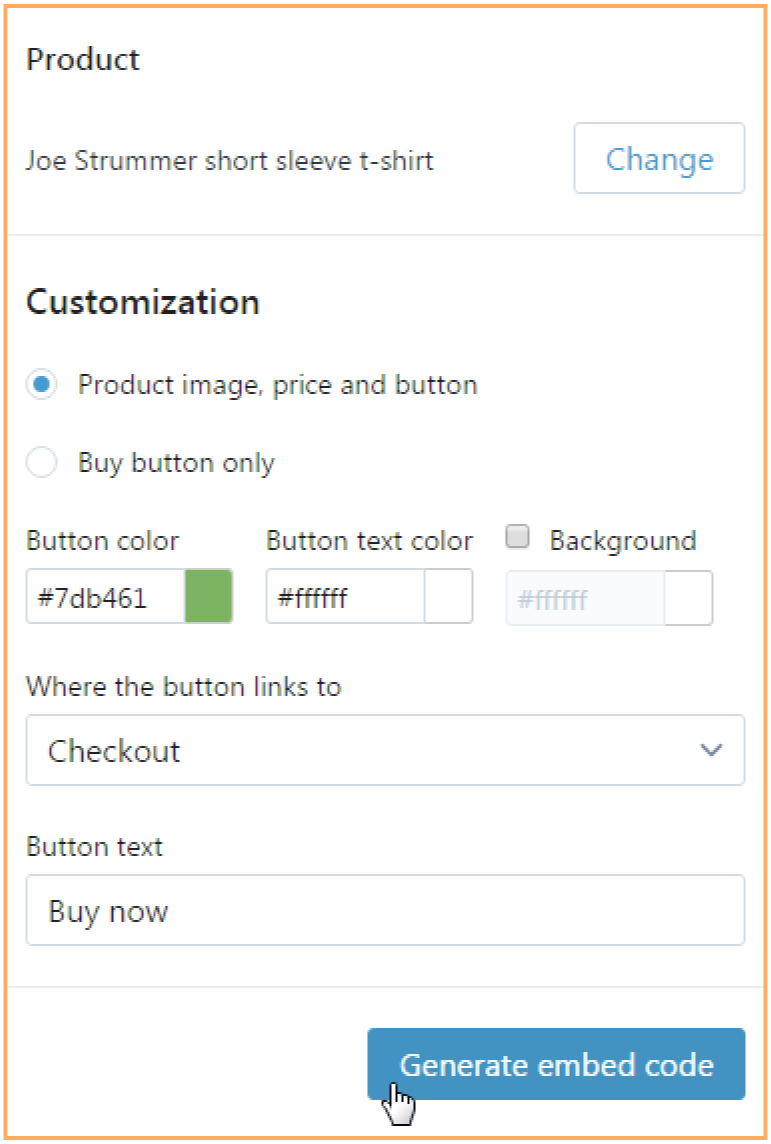
1. Log into your Shopify account.
2. Go to Shopify's App store and get the free Buy Button app.



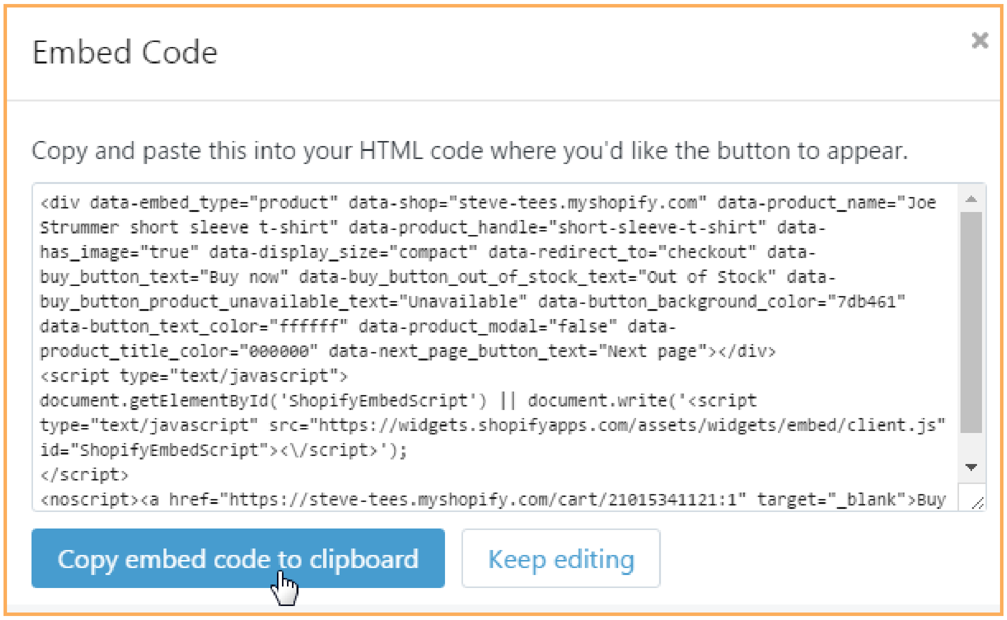
3. Within your Buy Button settings, choose the product or collection you want to sell on your Wild Apricot site then click the **Select product** or **Select collection** button.



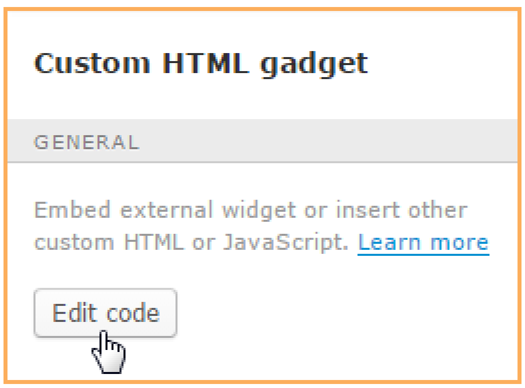
4. Adjust the settings that control how your product or collection appears on your Wild Apricot page.
5. Click the **Generate embed code** button.



6. Click the **Copy embed code to clipboard** button.



7. Begin editing the page where you want the product or collection to appear.
8. Add a custom HTML gadget where you want the product or collection to appear on your page.
9. After you have inserted the gadget, hover over it and click the **Settings** icon.
10. Within the gadget settings on the left, click the **Edit code** button.



11. In the window that appears, paste the embed code you copied then click the **Save** button.
12. Click the **Save** button to save the changes to your page.

Your product or collection will now appear on your Wild Apricot page.

Using Ecwid

Ecwid provides support for a free online store than can sell up to 10 different products. If you want to sell more products – or take advantage of premium features such as discount coupons, volume discounts, and multi-tier pricing – you can upgrade to a paid account. Ecwid does not charge setup fees or transaction fees.

Getting started with Ecwid

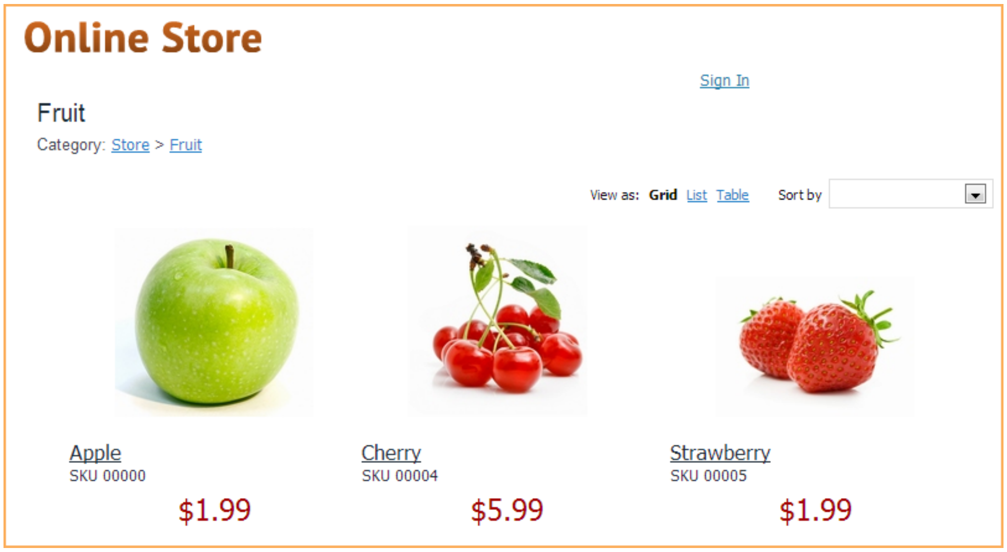
> ⚠ Instructions for third-party services like this are provided as a courtesy and may contain out of date information or screen clips. For the latest instructions, consult the third party's website.

To get started setting up an online store with Ecwid, go to www.ecwid.com and create an account. From the dashboard, you can add products and product categories, and track purchases. To get you started, Ecwid provides a number of sample products and categories.

Now that your account has been created, you can add a product browser widget to your Wild Apricot site.

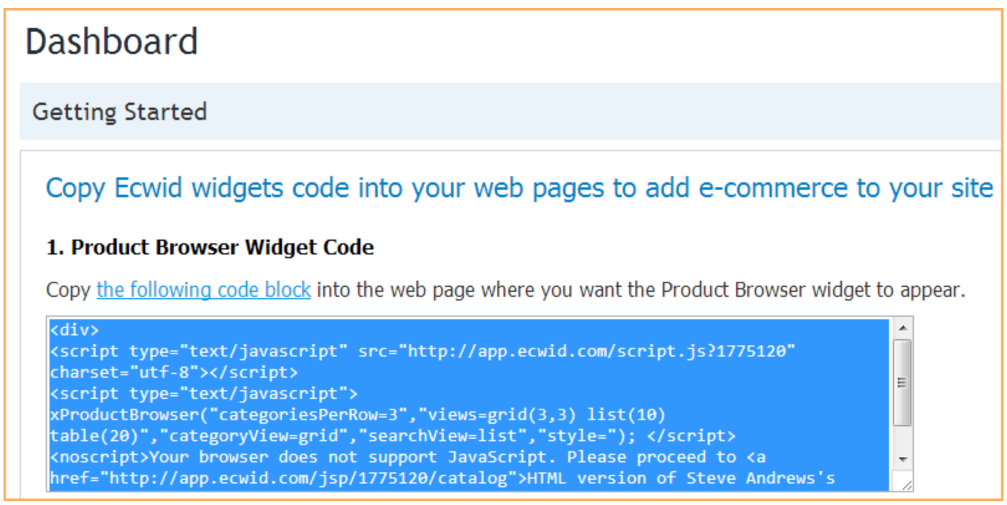
Adding a product browser

The product browser displays your products and product categories.



To add the product browser widget to a Wild Apricot page, follow these steps:

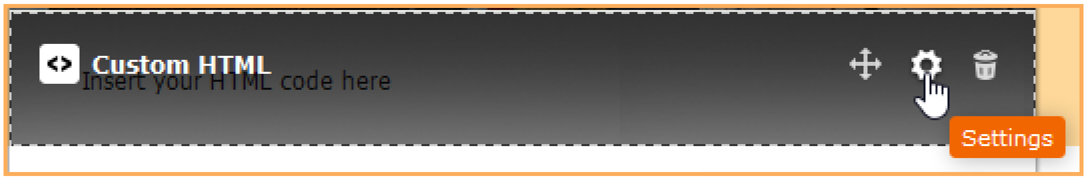
1. In the Getting Started section of your Ecwid dashboard, copy the code that appears under **Product Browser Widget Code**.



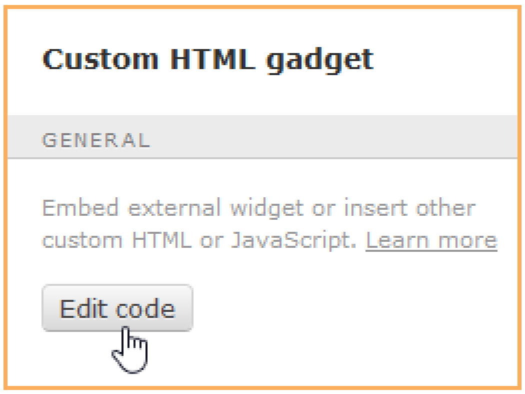
2. In your Wild Apricot site, go to **Sites pages** (under the **Website** menu) and begin editing the site page or page template where you want the online store to appear.
3. Click the **Gadgets** icon to display the list of available gadgets.
4. Drag the custom HTML gadget you want to insert from the Gadget list, and drop it on the desired location.

When a layout cell or placeholder is empty, a **Drop gadget or layout here** prompt will be displayed. When you drag a gadget over an empty layout cell or placeholder, it turns green, indicating that you can drop the gadget there. When you drag a gadget above or below a layout, a prompt will appear indicating that you can drop the gadget before or after the layout.

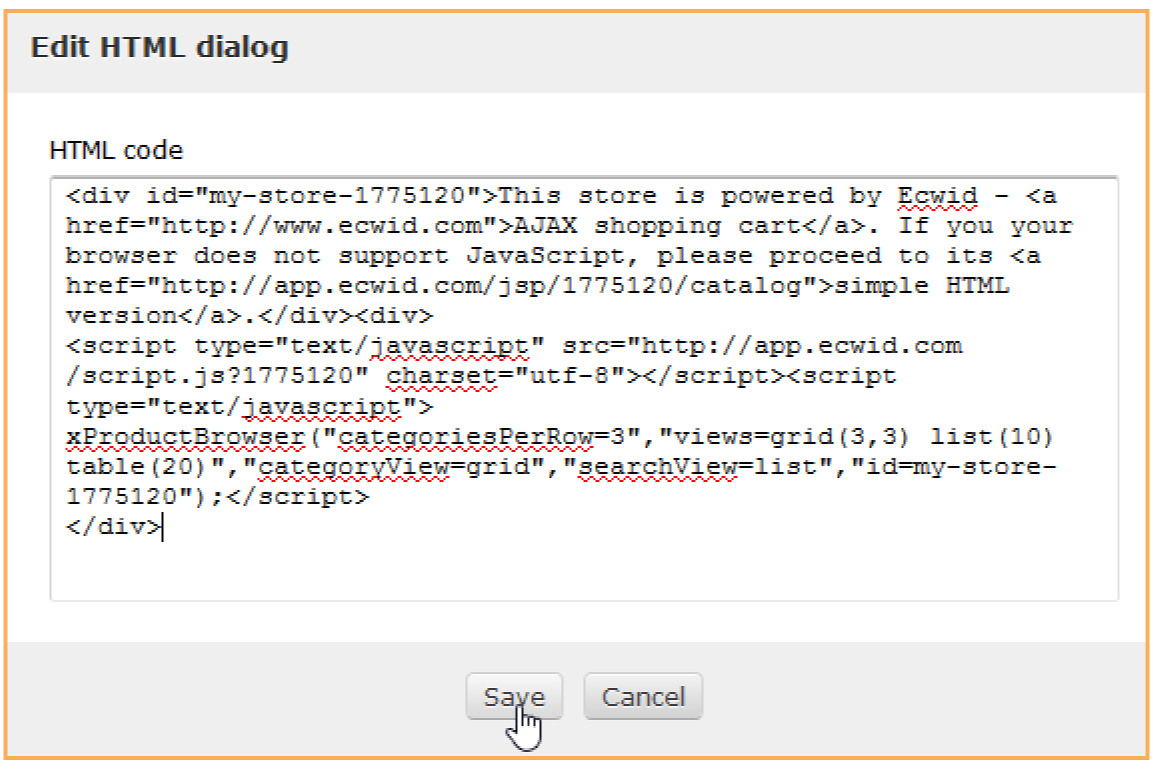
5. After you have inserted the gadget, hover over it and click the **Settings** icon.



6. Within the gadget settings on the left, click the **Edit code** button.



7. In the dialog that appears, paste the code you copied from the Ecwid site then click the **Save** button.



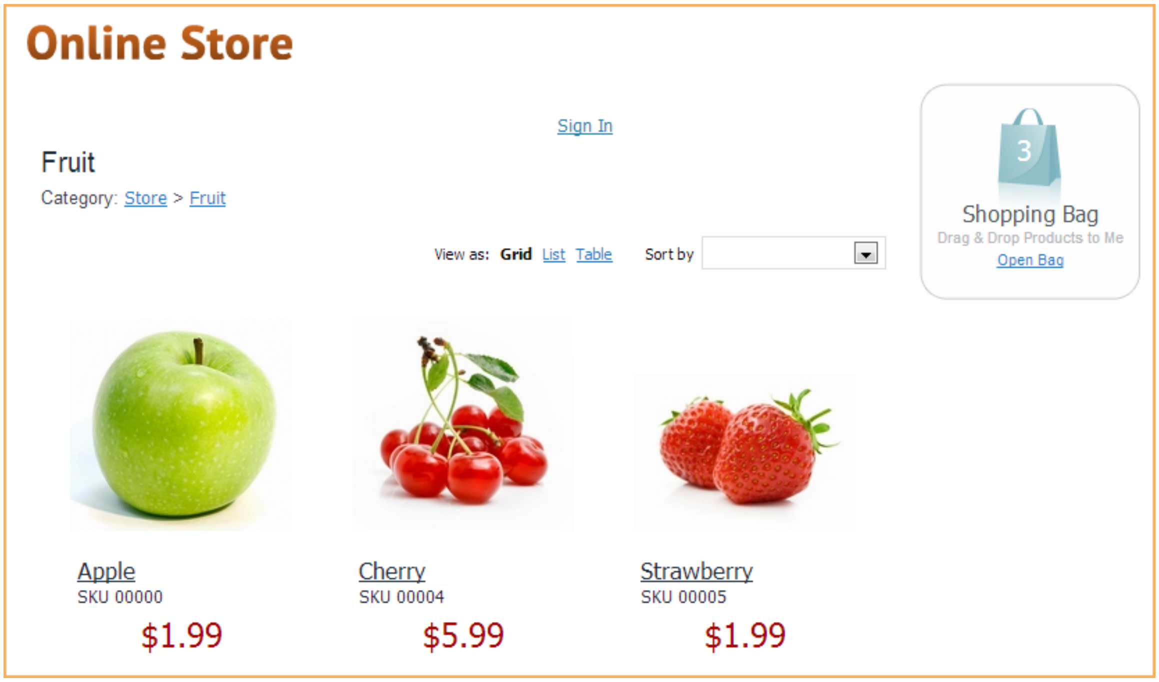
8. Click the **Save** button to save your changes.

The store should now appear on your site page. Switch to public view if the store does not immediately appear.

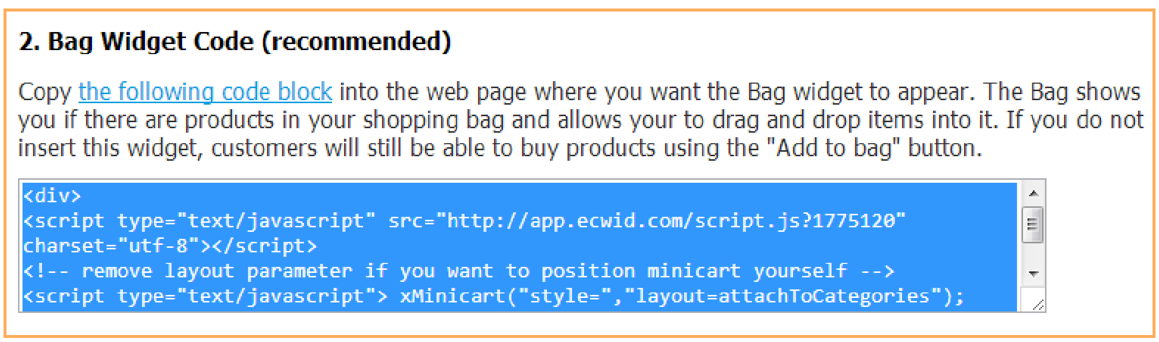
> Instead of creating a custom HTML gadget to execute the code, you can use the Snippet feature to embed the code within a content gadget. For more information on using the Snippet feature, see Inserting and modifying HTML or JavaScript.

Adding a shopping bag

Within your online store, shoppers choose products by dragging and dropping them onto the shopping bag (aka shopping cart). The shopping bag also shows how many products have been selected so far.



To add a shopping bag to your online store, copy the code that appears under **Bag Widget Code** on your Ecwid dashboard.

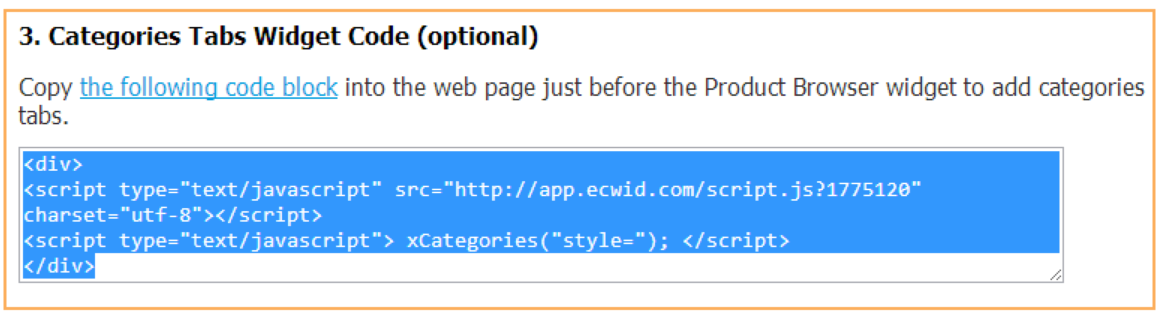


Within the Wild Apricot page where your online store appears, use the **S (Snippet)** button to paste the code where you want the shopping bag to appear. For example, if you are using a 2-column layout on your page, you might want to paste the product browser code in the first column and the shopping bag code in the second column.

Adding category tabs

You can add tabs above the product browser that allow shoppers to quickly jump from one product category to another.

To add product category tabs to your online store, copy the code that appears under **Categories Tabs Widget Code** on your Ecwid dashboard.



Within the Wild Apricot page where your online store appears, paste the code into a custom HTML gadget just ahead of the custom HTML gadget containing the product browser code.

Adding a category menu

Instead of product category tabs, you can display a product category menu along the left side of the product browser.

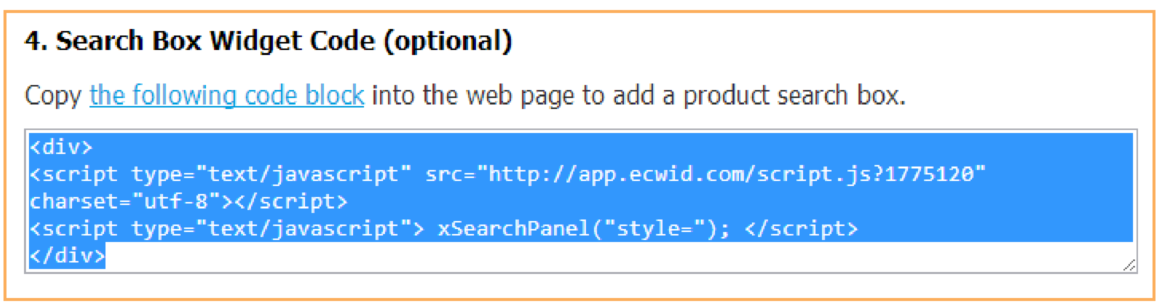
To add a product category menu to your online store, copy the code that appears under **Categories Menu Widget Code** on your Ecwid dashboard.

Within the Wild Apricot page where your online store appears, paste the code into a custom HTML gadget just ahead of – or to the left of – the custom HTML gadget containing the product browser code.

Adding product search functionality

You can add product search functionality to your online store. Shoppers can search for products and jump to products within the search results.

To add a shopping bag to your online store, copy the code that appears under **Search Box Widget Code** on your Ecwid dashboard.



Within the Wild Apricot page where your online store appears, paste the code into a custom HTML gadget and position the gadget where you want the search box to appear.

Troubleshooting Ecwid integration

Ecwid uses unencrypted *http* URLs in its embed code. If your Wild Apricot site uses encryption, requiring access via *https*, your Ecwid store may not appear on your Wild Apricot site page. To correct this, edit the HTML code you embedded and replace all instances of:

```
http://app.ecwid.com
```

with:

```
//app.ecwid.com
```

On this page:

Inserting custom forms

Inserting custom forms

> ⚠ Instructions for third-party services like these are provided as a courtesy and may contain out of date information or screen clips. For the latest instructions, consult the third party's website.

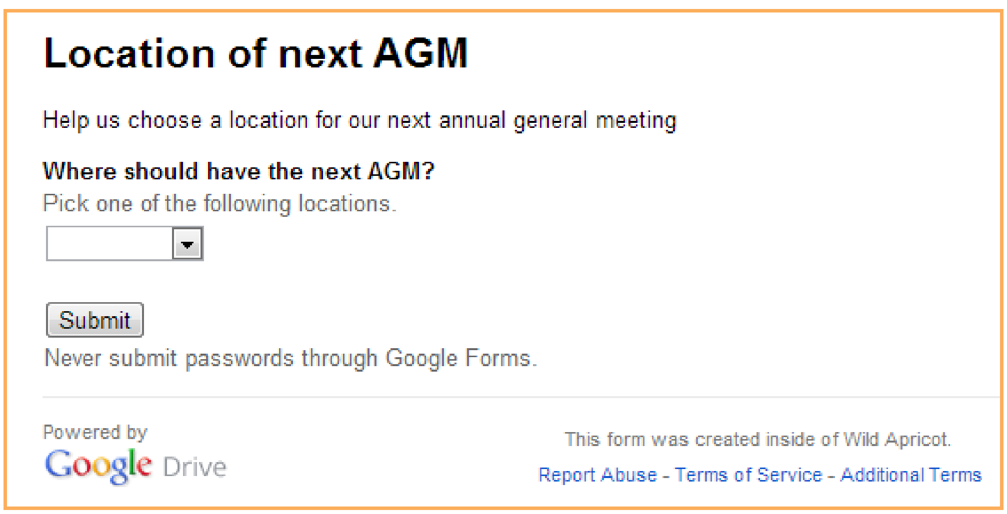
Wild Apricot includes online forms for all key functions in member-based organizations such as online member application , member profile update , event registration , and donations . If you want to add a form to perform a different function, such as collecting input or feedback, you can insert a custom form using code provided by third-party sites such as Google, Wufoo, or SurveyMonkey.

> ⚠ Information collected through third-party sites will not be stored in your Wild Apricot database.

You can insert code to display a custom form into a custom HTML gadget or content gadget on a page or page template. For more information on inserting custom code, see Inserting and modifying HTML or JavaScript .

Adding a Google form

You can add a Google form to your Wild Apricot to help you gather information from your members.



A Google form can be connected to a Google spreadsheet where the responses will be stored. Otherwise, the responses will be displayed within the Responses menu within the form file. For more information on Google forms, see https://support.google.com/drive/answer/87809?hl=en&ref_topic=1360904.

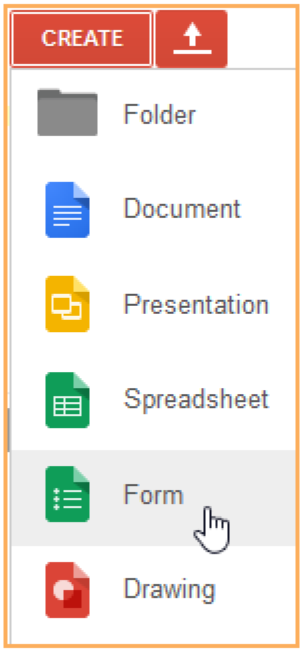
You can create a Google form from your Google Drive or from an existing Google spreadsheet.

Creating a Google form from Google Drive

To create a Google form within Google Drive, follow these steps:

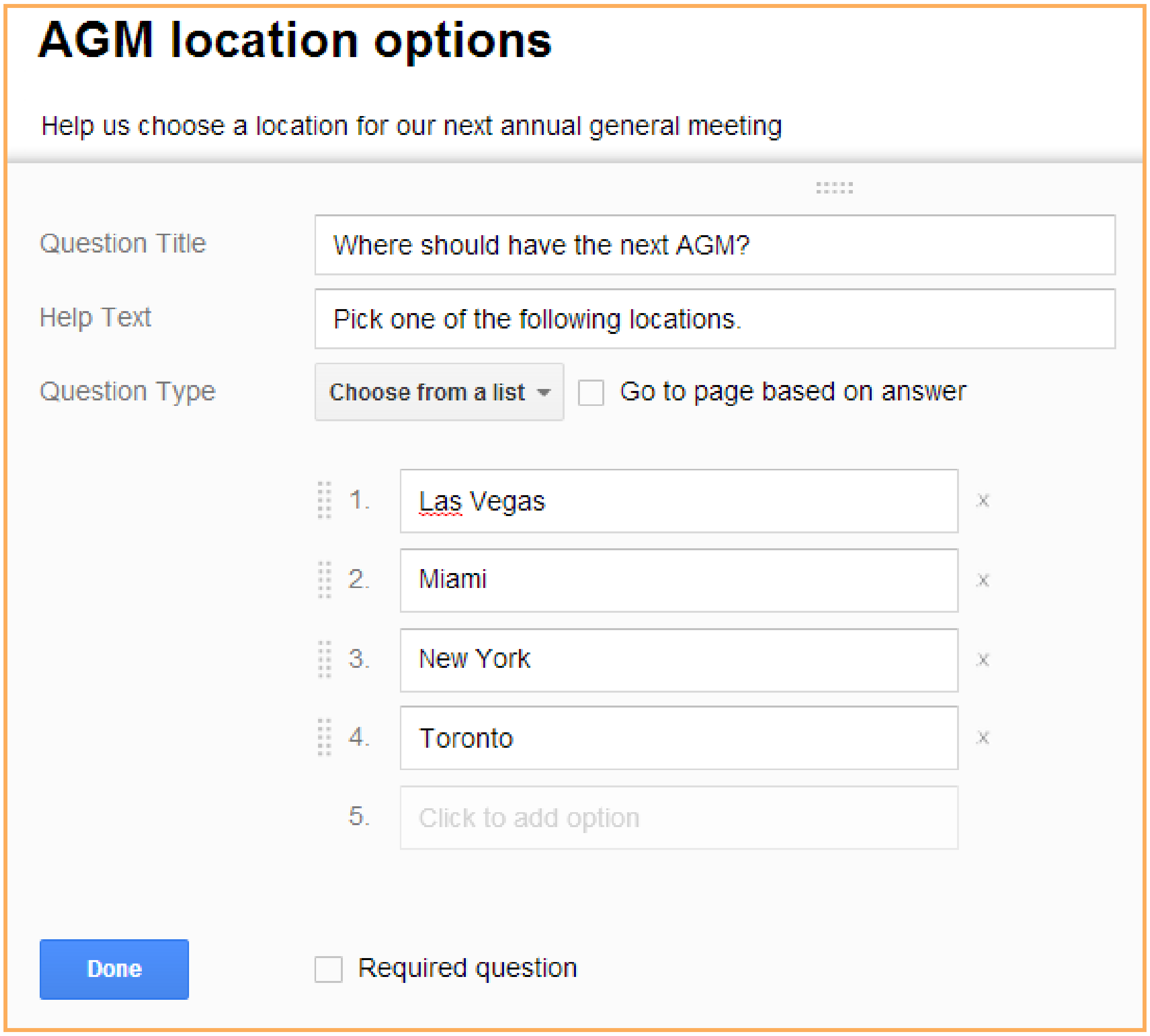
Read more/less

1. Click the **Create** button, then select **Form**.



2. Within the form template that appears, add the questions you'd like to include on the form. You can also provide a title and description for your form. (For instructions on adding and editing questions, see https://support.google.com/drive/answer/283973

7?hl=en&ref_topic=1360904.)



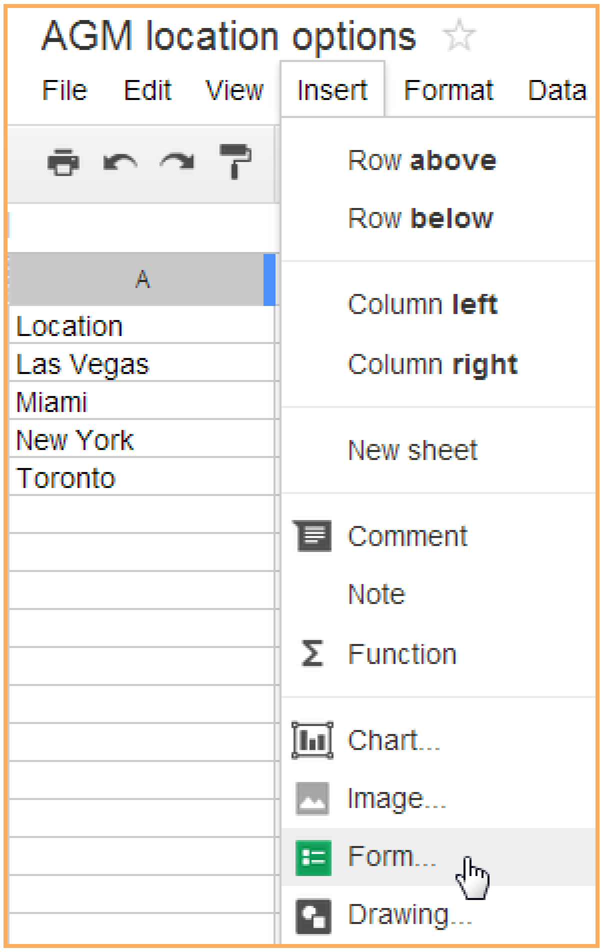
3. When you are finished designing your form, click **Done**.

Creating a Google form from a Google spreadsheet

You can create a Google form from within a Google spreadsheet, and use the spreadsheet to store the responses.

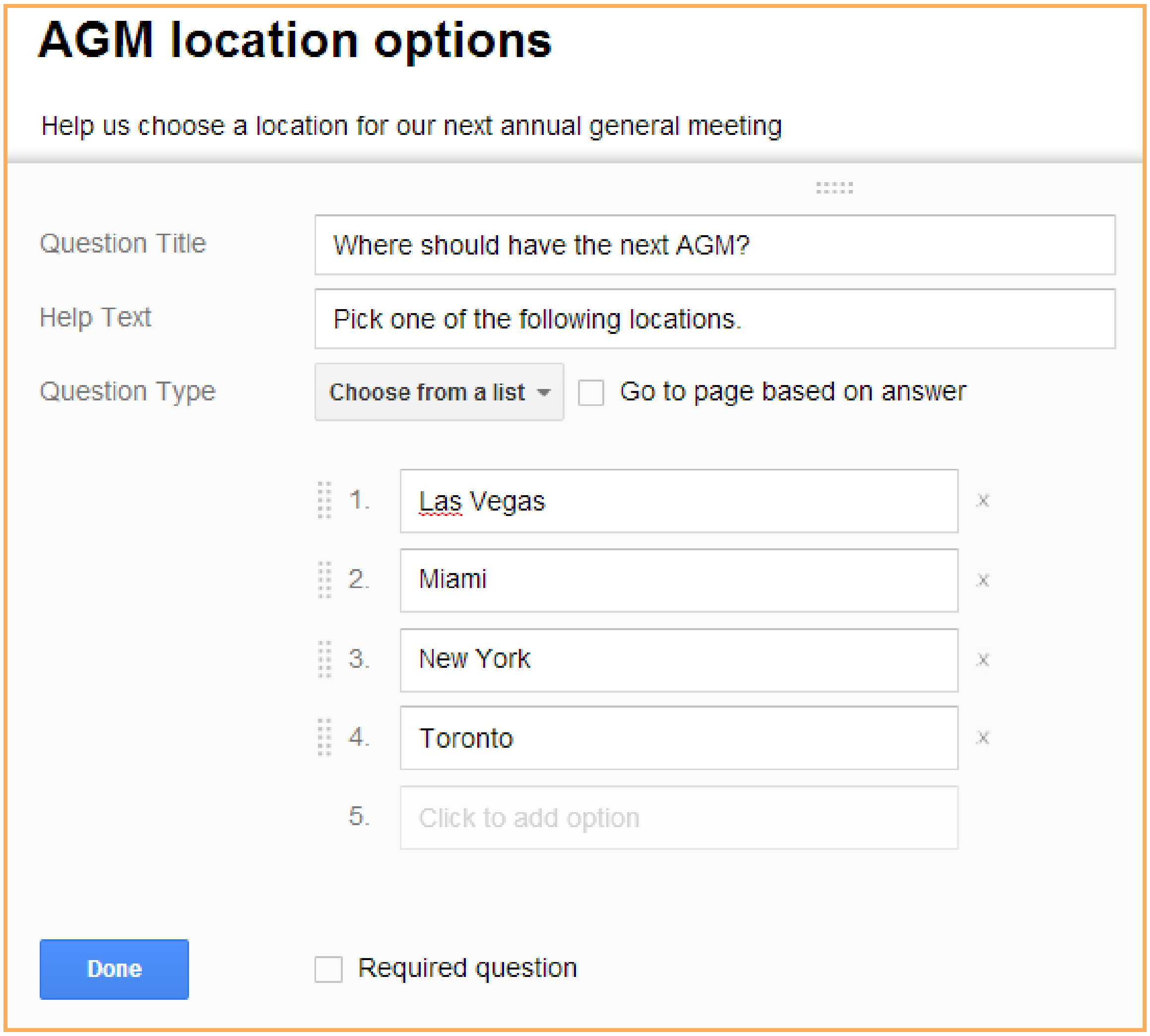
Read more/less

1. While modifying a spreadsheet, click the **Insert** menu and select **Form**.



2. Within the form template that appears, add the questions you'd like to include on the form. You can also provide a title and description for your form. (For instructions on adding and editing questions, see https://support.google.com/drive/answer/283973

7?hl=en&ref_topic=1360904.)



3. When you are finished designing your form, click **Done**.

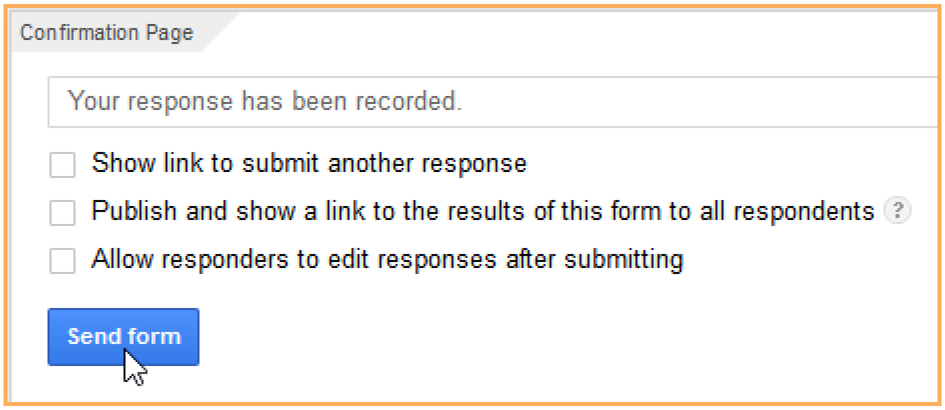
A **Form Responses** tab will now be added to your spreadsheet.

Integrating a Google form into your Wild Apricot site

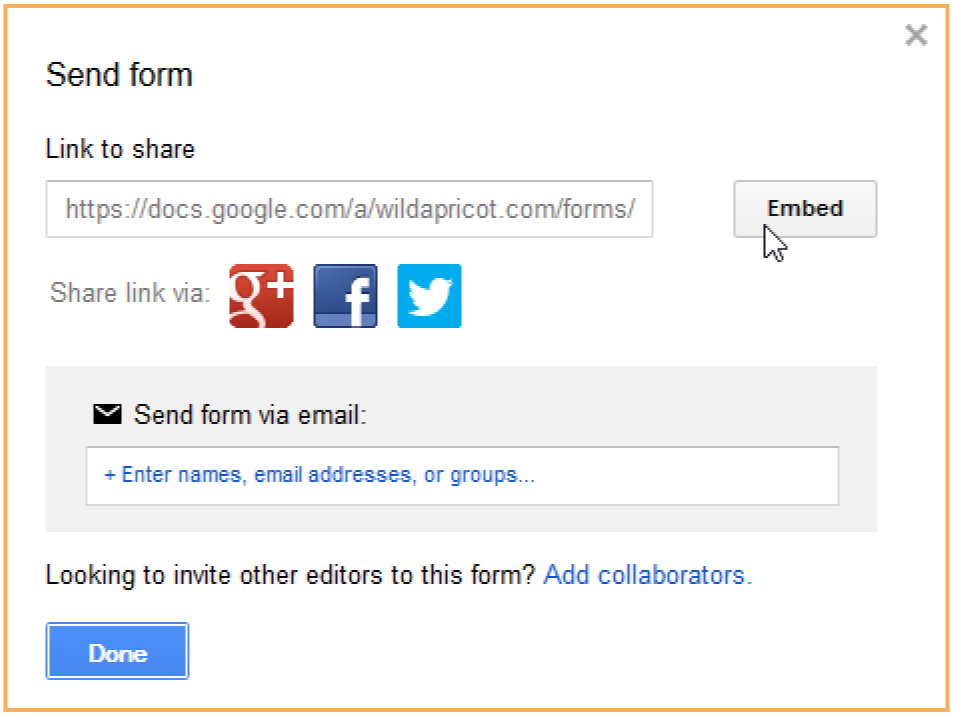
To embed a Google form into a Wild Apricot site, follow these steps:

Read more/less

1. Towards the bottom of your Google form file, click **Send form**.



2. On the screen that appears, click **Embed**.

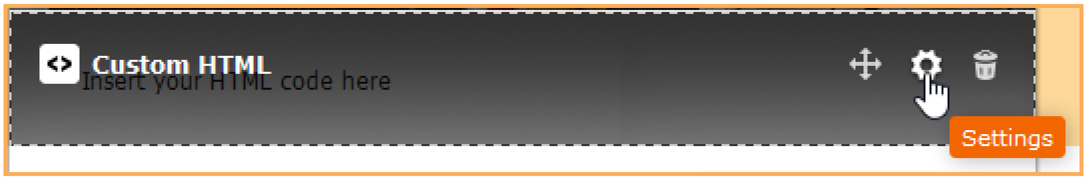


3. On the next screen, copy the code to embed the Google form.

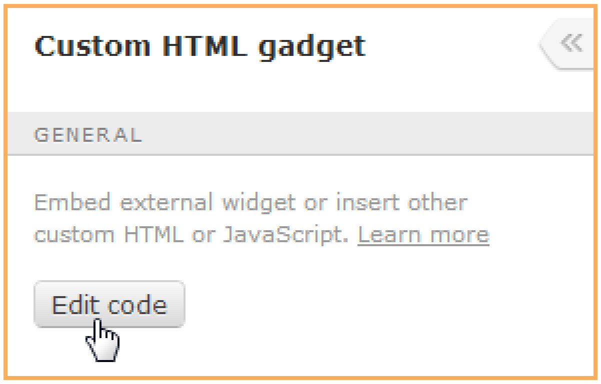
4. In your Wild Apricot site, go to **Sites pages** (under the **Website** menu) and begin editing the site page or page template where you want the form to appear.
5. Click the **Gadgets** icon to display the list of available gadgets.
6. Drag the custom HTML gadget from the Gadget list, and drop it on the desired location.

When a layout cell or placeholder is empty, a **Drop gadget or layout here** prompt will be displayed. When you drag a gadget over an empty layout cell or placeholder, it turns green, indicating that you can drop the gadget there. When you drag a gadget above or below a layout, a prompt will appear indicating that you can drop the gadget before or after the layout.

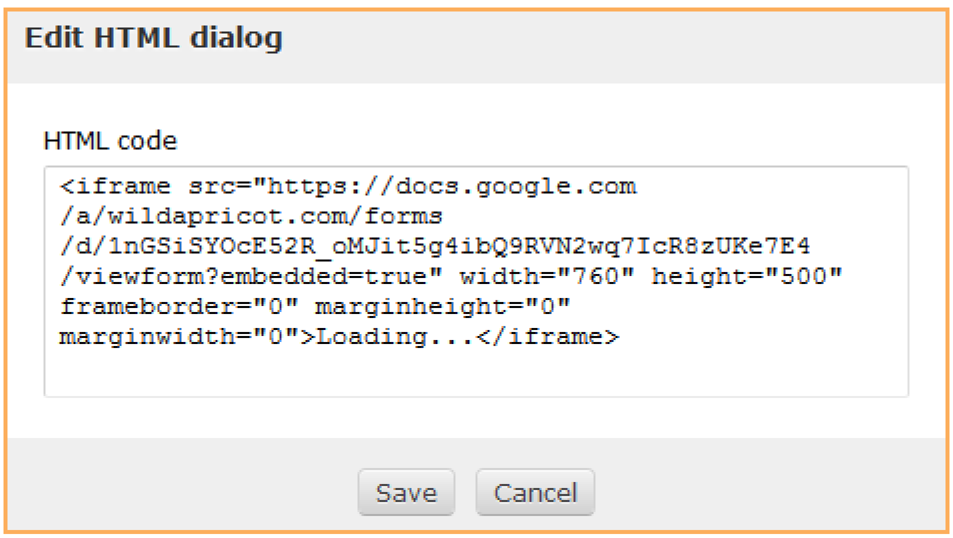
7. After you have inserted the gadget, hover over it and click the **Settings** icon.



8. Within the gadget settings on the left, click the **Edit code** button.



9. In the dialog that appears, paste the embed code for the form then click the **Save** button.



10. Click the **Save** button to save your changes.

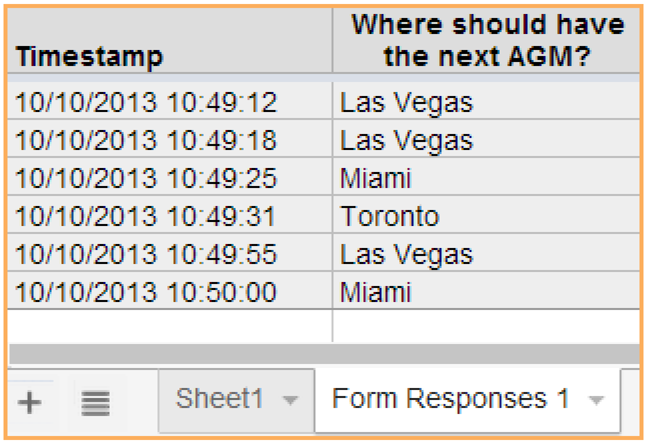
The form should now appear on your site page.

> ⚠ Instead of creating a custom HTML gadget to execute the code, you can use the Snippet feature to embed the form code within a content gadget. For more information on using the Snippet feature, see Inserting and modifying HTML or JavaScript.

Viewing responses

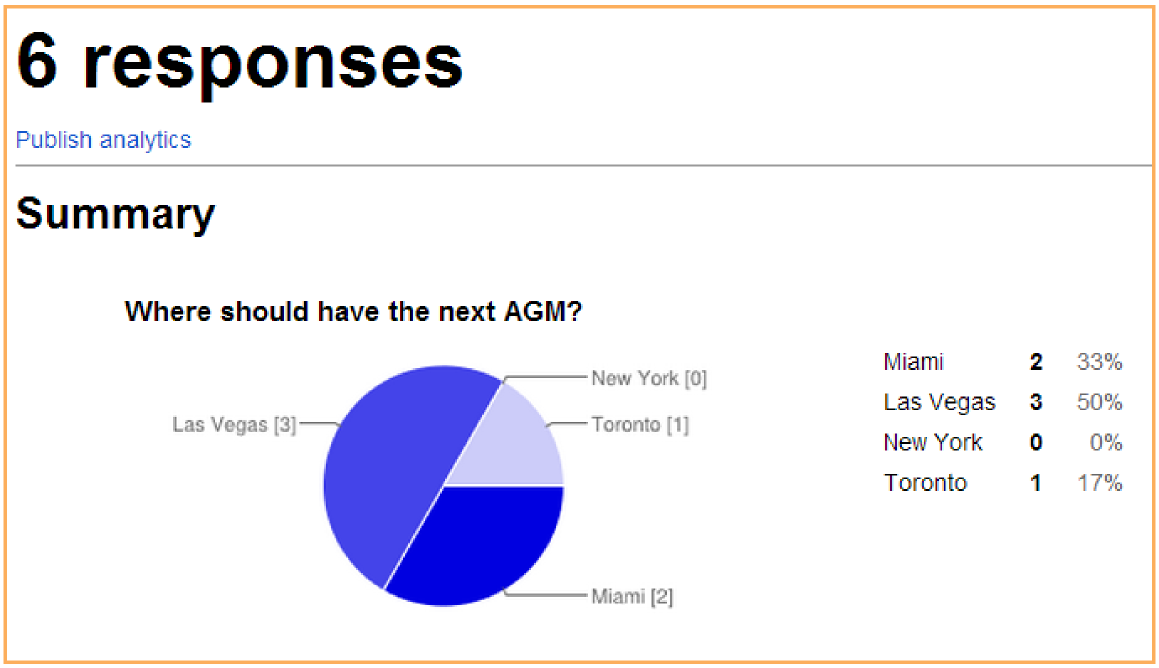
If you created the form from within a spreadsheet, the responses to your form will be stored on the **Form Responses** tab within your spreadsheet.

Read more/less

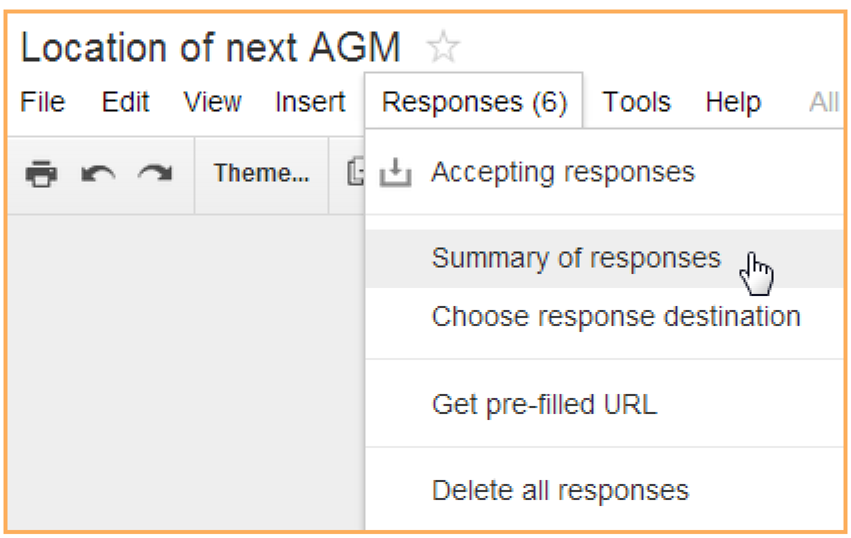


Timestamp	Where should have the next AGM?
10/10/2013 10:49:12	Las Vegas
10/10/2013 10:49:18	Las Vegas
10/10/2013 10:49:25	Miami
10/10/2013 10:49:31	Toronto
10/10/2013 10:49:55	Las Vegas
10/10/2013 10:50:00	Miami

If you created the form from Google Drive, rather than within a spreadsheet, the responses to the form will appear on a **Summary of responses** screen...

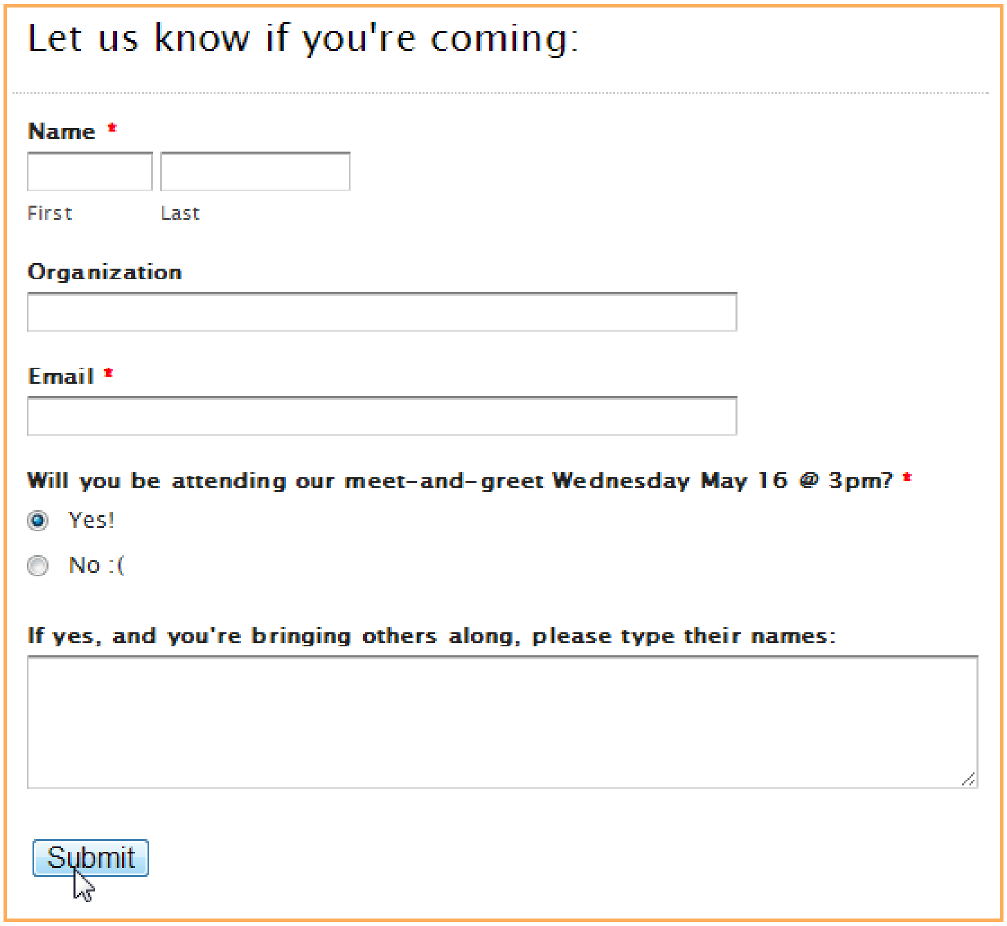


...that you can view by clicking the **Summary of responses** option from the **Responses** menu.



Adding a Wufoo form

You can create a free Wufoo form for online surveys, contact forms, order forms, and other online forms.

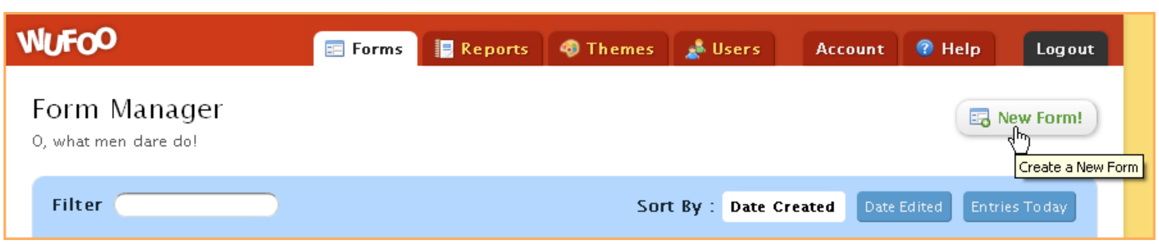


All data collected through Wufoo form is stored in your Wufoo account and not in your Wild Apricot account. To review this data, log in into your Wufoo account. For more details, see the Wufoo help section at http://wufoo.com/docs.

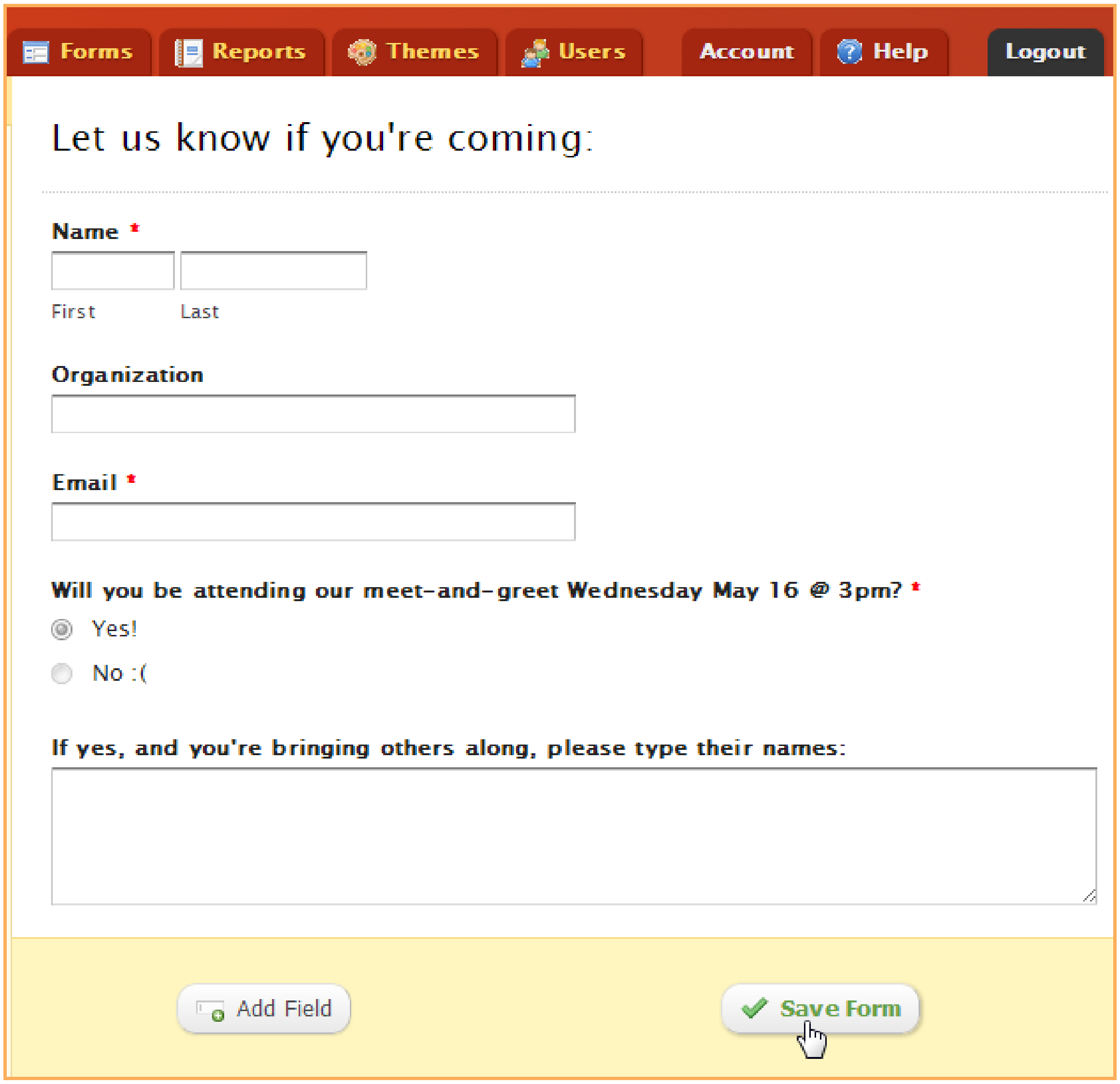
To insert a Wufoo form on a Wild Apricot page, follow these steps:

Read more/less

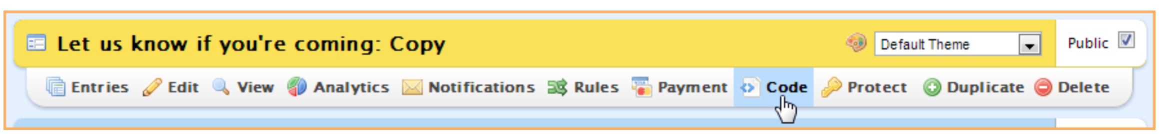
1. Go to http://wufoo.com, register, and start a free Wufoo account.
2. Click **Forms** to go to the Form Manager screen.
3. Click the **New Form** button to create a new form.



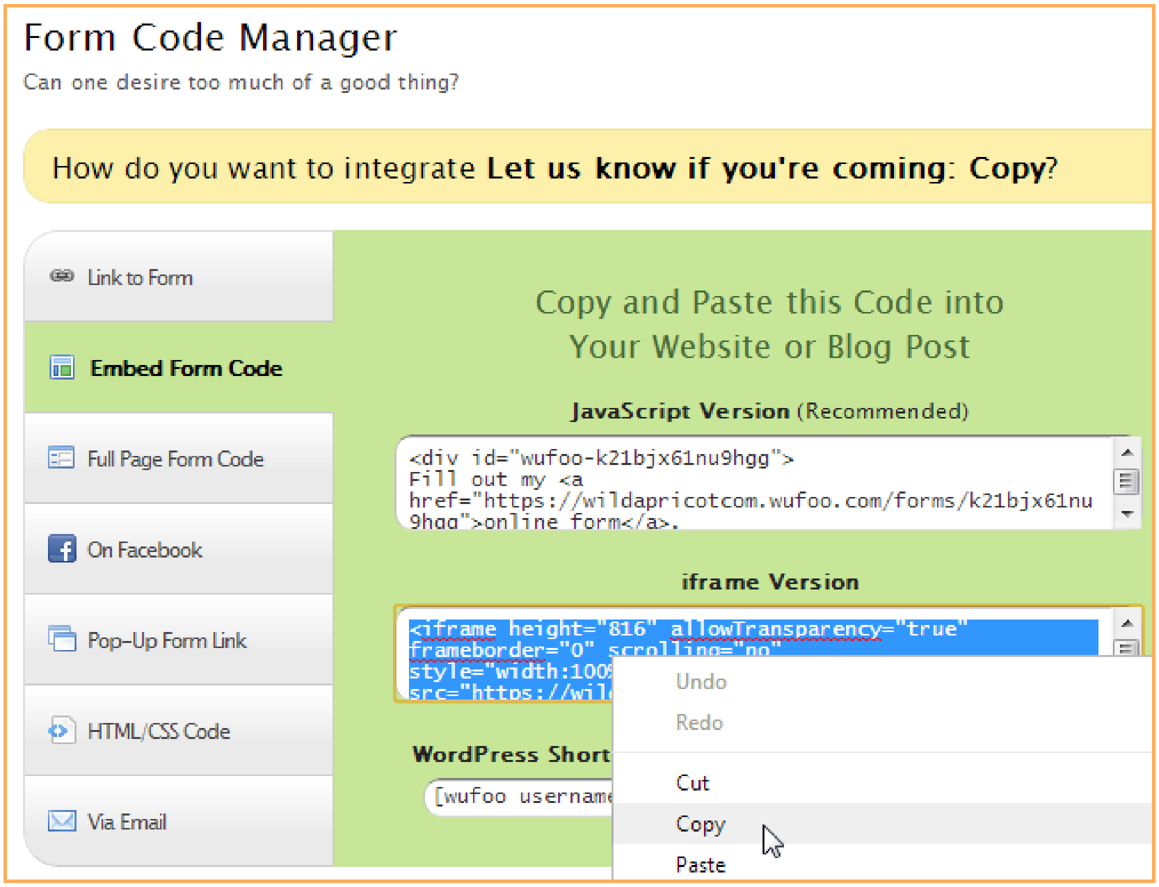
4. Design your form by adding and customizing fields. When you are finished designing your form, click the **Save Form** button.



5. From the Form Manager screen, hover over the name of your form, then click the **Code** button.



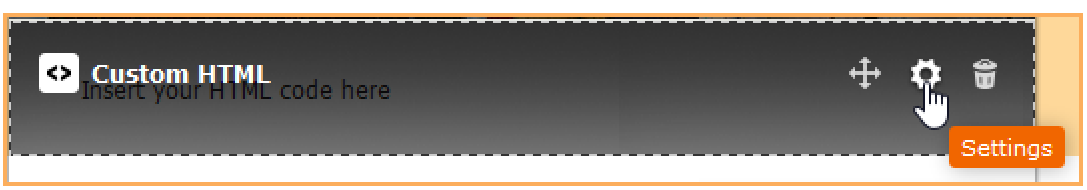
6. Along the left side of the code screen, click **Embed Form Code**.
7. Click within the **iframe Version** box then copy and paste the selected code.



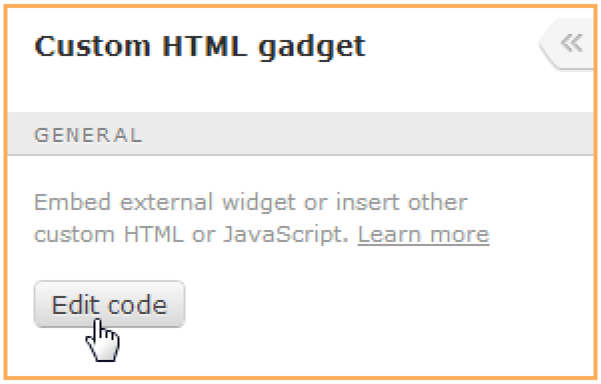
8. In your Wild Apricot site, go to **Sites pages** (under the **Website** menu) and begin editing the site page or page template where you want the form to appear.
9. Click the **Gadgets** icon to display the list of available gadgets.
10. Drag the custom HTML gadget you want to insert from the Gadget list, and drop it on the desired location.

When a layout cell or placeholder is empty, a **Drop gadget or layout here** prompt will be displayed. When you drag a gadget over an empty layout cell or placeholder, it turns green, indicating that you can drop the gadget there. When you drag a gadget above or below a layout, a prompt will appear indicating that you can drop the gadget before or after the layout.

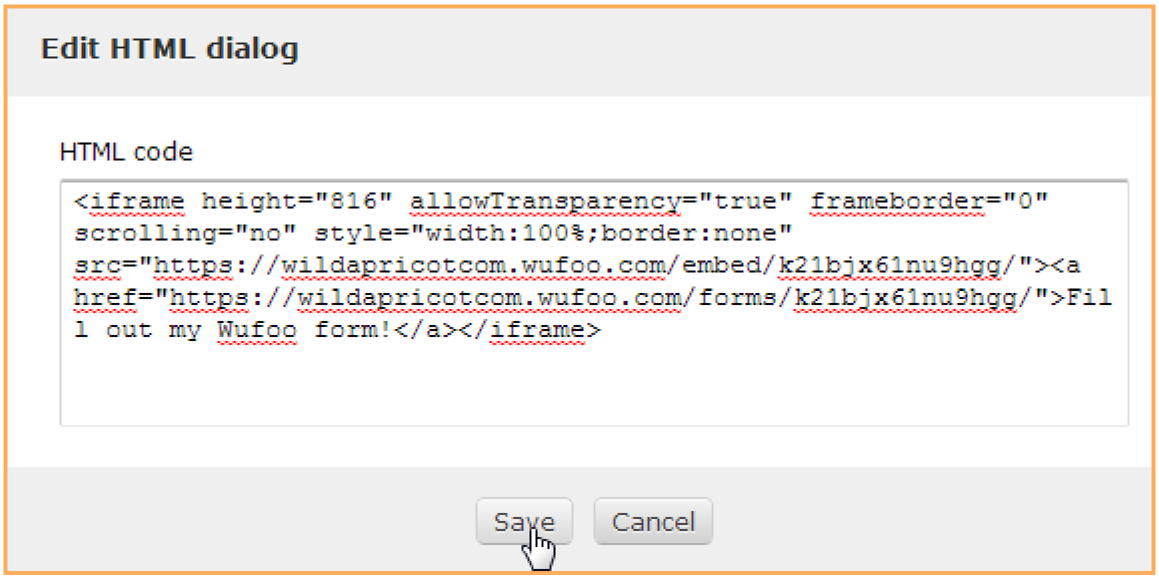
11. After you have inserted the gadget, hover over it and click the **Settings** icon.



12. Within the gadget settings on the left, click the **Edit code** button.



13. In the dialog that appears, paste the embed code for the form then click the **Save** button.



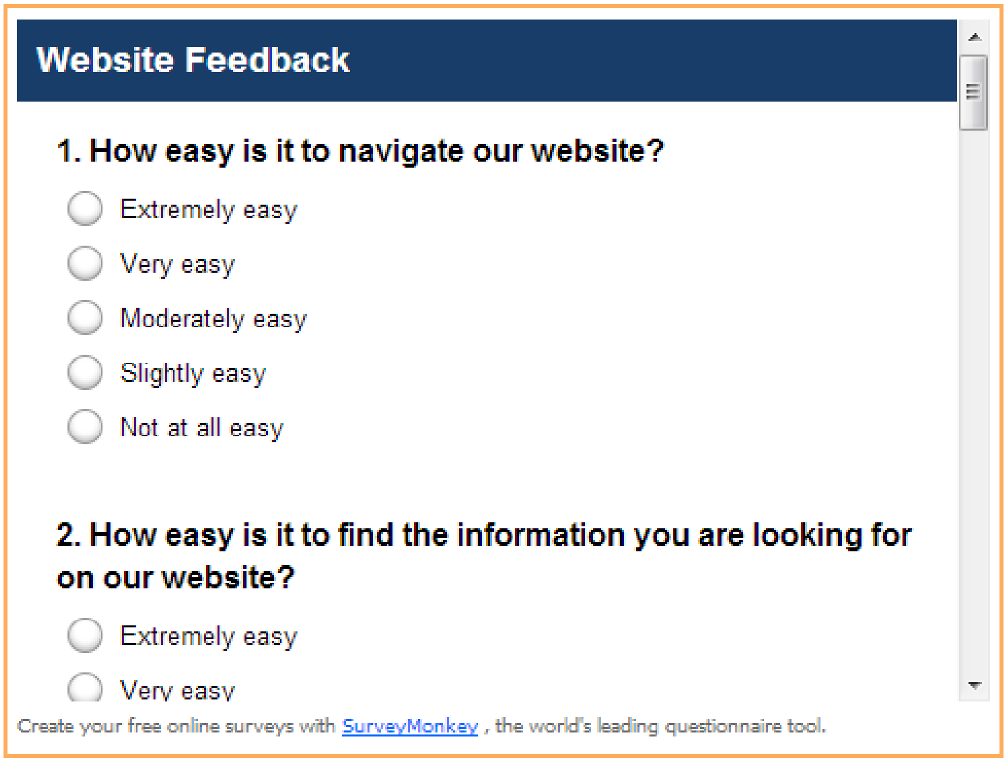
14. Click the **Save** button to save your changes.

The form should now appear on your site page.

> Instead of creating a custom HTML gadget to execute the code, you can use the Snippet feature to embed the form code within a content gadget. For more information on using the Snippet feature, see Inserting and modifying HTML or JavaScript.

Adding a SurveyMonkey survey

You can create a free SurveyMonkey survey to gather input or feedback from your members. The survey results can be displayed graphically or downloaded into a spreadsheet.

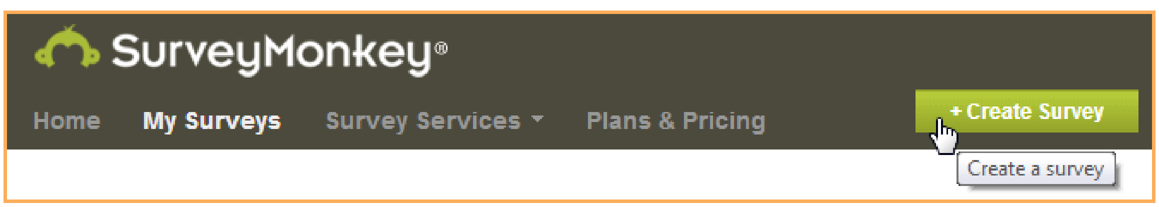


Your survey results will be stored in your SurveyMonkey account and not in your Wild Apricot database.

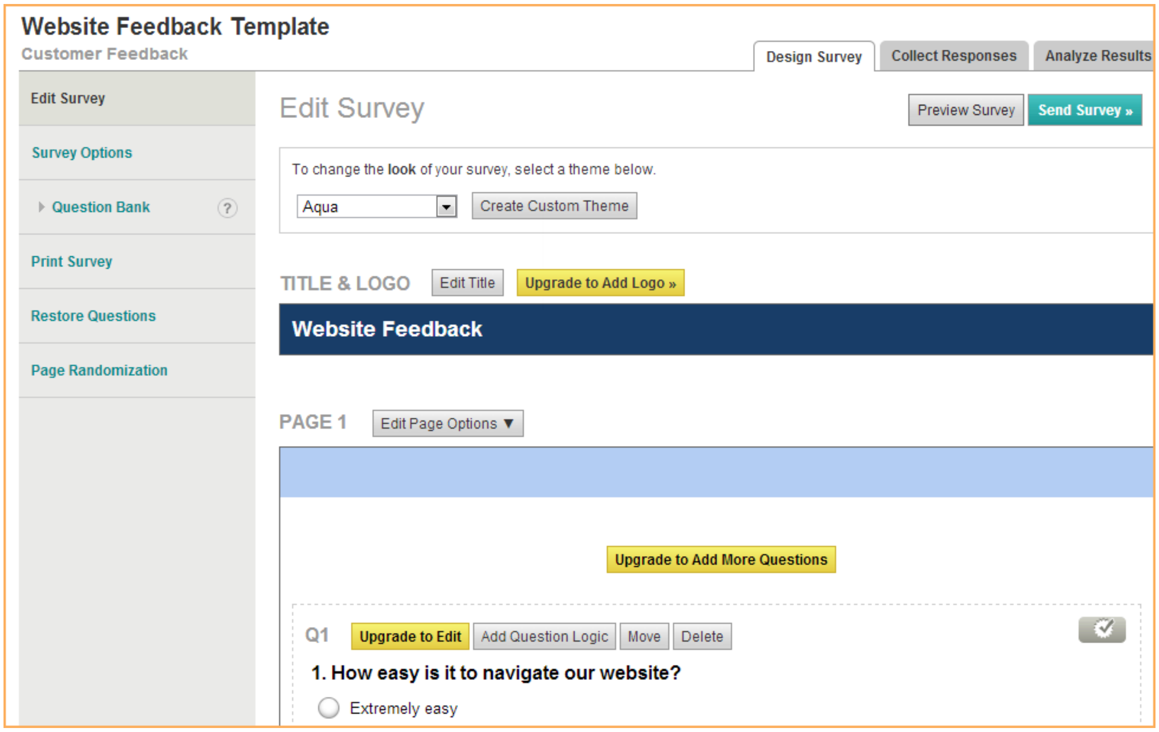
To add a SurveyMonkey to a page on your Wild Apricot site, follow these steps:

Read more/less

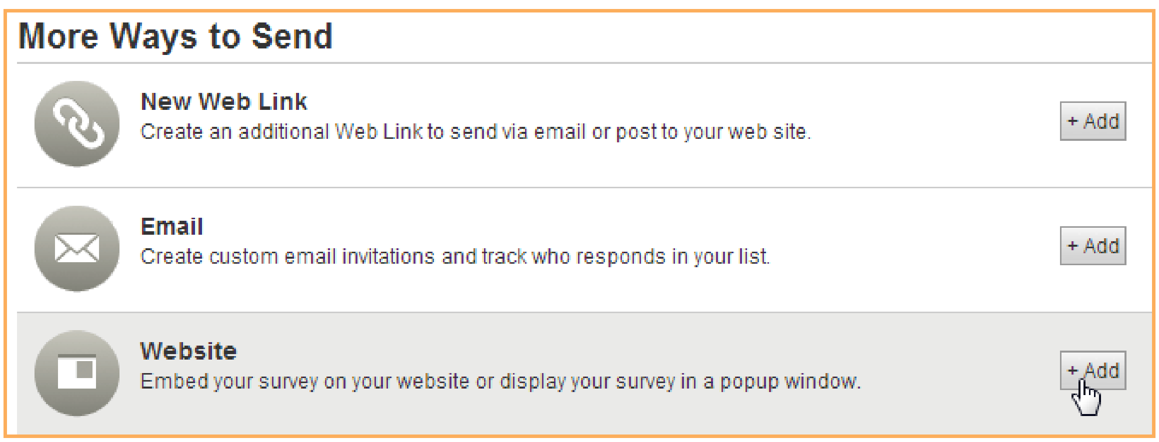
1. Sign up for a free account at www.surveymonkey.com.
2. Click the **Create Survey** button to create a new survey.



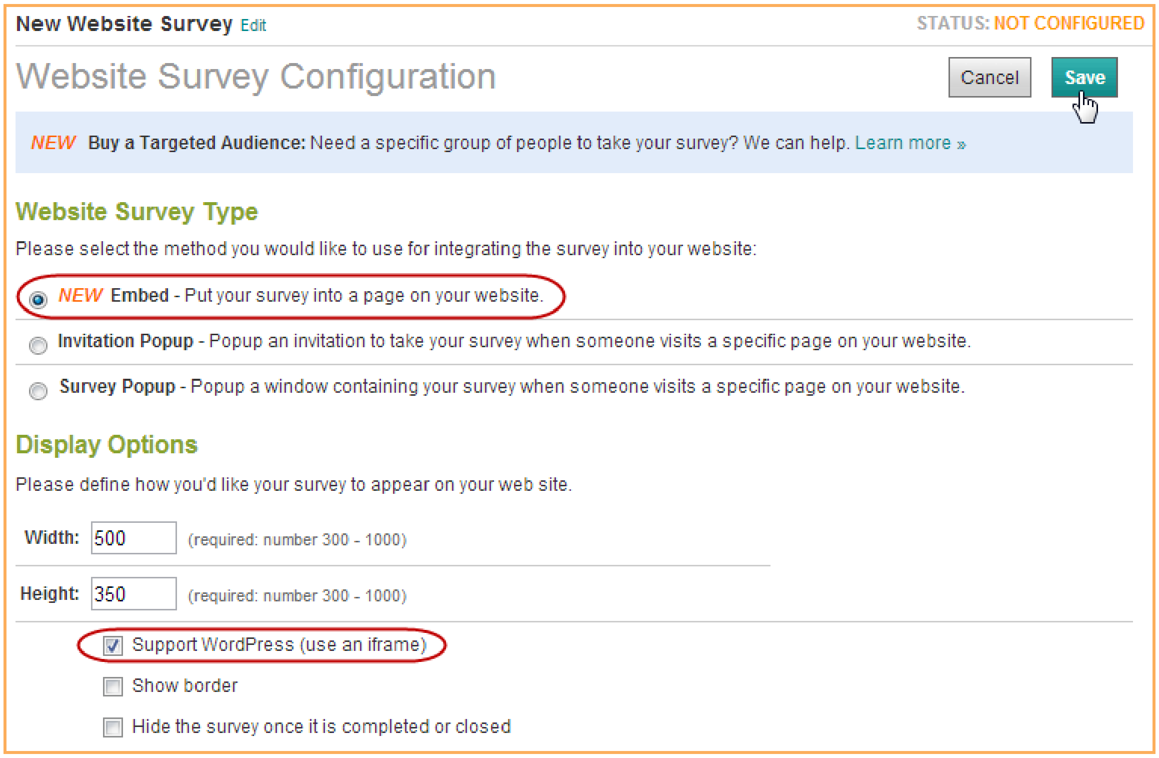
3. Follow the instructions to design your survey.



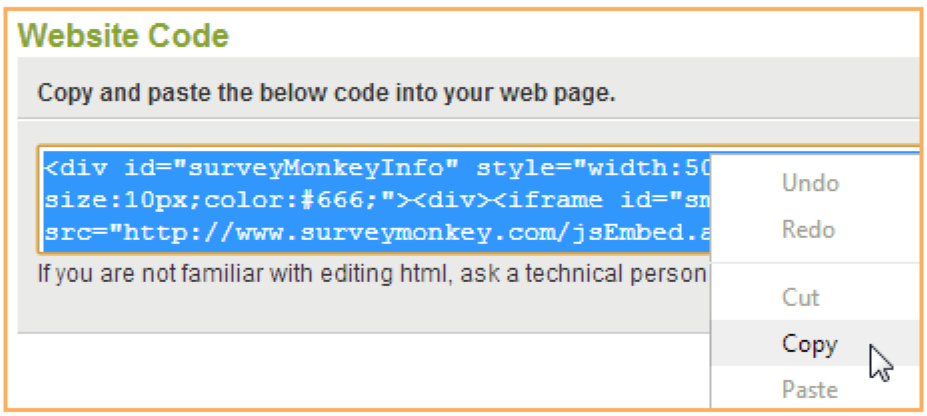
4. When you are finished designing your survey, click the **Send Survey** button.
5. To provide a link to your survey on a Wild Apricot page, copy the web link that appears, then insert it as a link in a content gadget on your Wild Apricot page. For more information, see Inserting links.
6. To embed the survey in a page on your Wild Apricot site, click the **+Add** button beside **Website** under the **More Ways to Send** heading.



7. Under **Website Survey Type**, select the **Embed** option.
8. Under **Display Options**, check **Support WordPress (use an iframe)** then click the **Save** button.



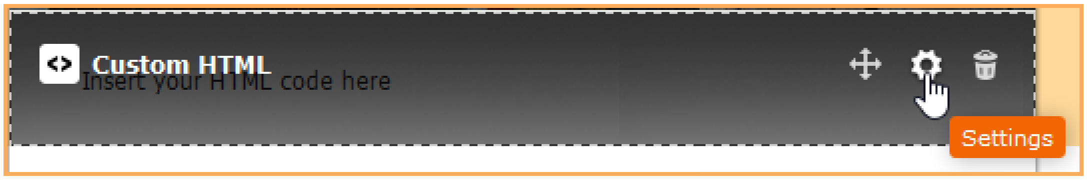
9. Copy the website code that appears.



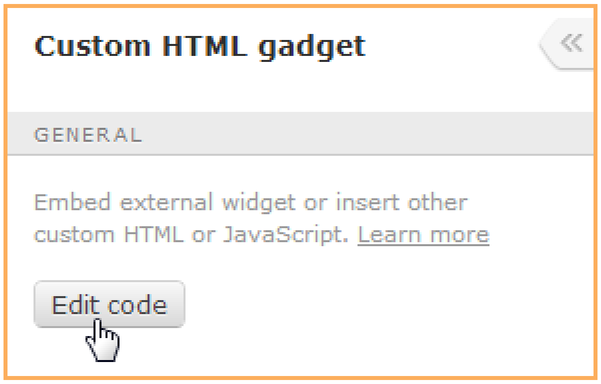
10. In your Wild Apricot site, go to **Sites pages** (under the **Website** menu) and begin editing the site page or page template where you want the survey to appear.
11. Click the **Gadgets** icon to display the list of available gadgets.
12. Drag the custom HTML gadget you want to insert from the Gadget list, and drop it on the desired location.

When a layout cell or placeholder is empty, a **Drop gadget or layout here** prompt will be displayed. When you drag a gadget over an empty layout cell or placeholder, it turns green, indicating that you can drop the gadget there. When you drag a gadget above or below a layout, a prompt will appear indicating that you can drop the gadget before or after the layout.

13. After you have inserted the gadget, hover over it and click the **Settings** icon.



14. Within the gadget settings on the left, click the **Edit code** button.



15. In the dialog that appears, paste the embed code for the survey then click the **Save** button.

16. Click the **Save** button to save your changes.

The survey should now appear on your site page.

Instead of creating a custom HTML gadget to execute the code, you can use the Snippet feature to embed the survey code within a content gadget. For more information on using the Snippet feature, see Inserting and modifying HTML or JavaScript.

On this page:

        - Integrating a Google form into your Wild Apricot site
        - Viewing responses
    - Adding a Wufoo form
    - Adding a SurveyMonkey survey

Expand all sections

See also:

- Membership application form
- Event registration form
- Online donation form
- E-mail subscription form
- Inserting and modifying HTML or JavaScript
- Custom HTML gadget

Tracking website traffic

Tracking website traffic

Instructions for third-party services like this are provided as a courtesy and may contain out of date information or screen clips. For the latest instructions, consult the third party's website.

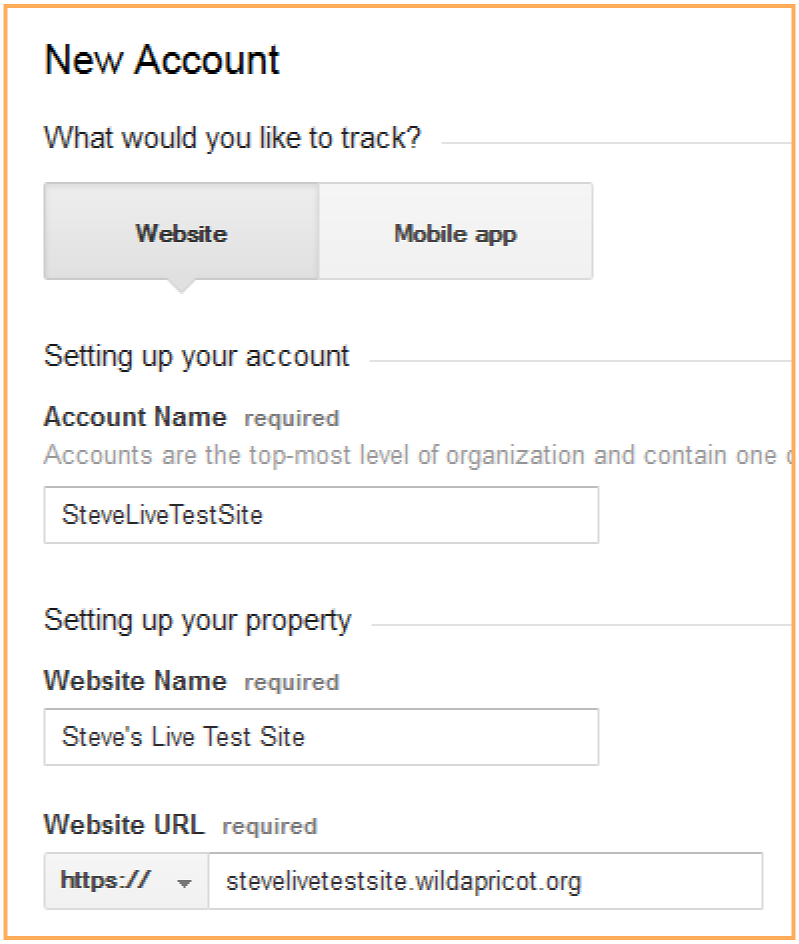
There are several third-party services that allow you to track and analyze traffic to your Wild Apricot site, including Google Analytics. Using Google Analytics, you can track the number of page views, unique visitors, and average visit duration, among many other metrics.

To use Google Analytics, you need both a Google account and a Google Analytics account. Both are provided free of charge by Google.

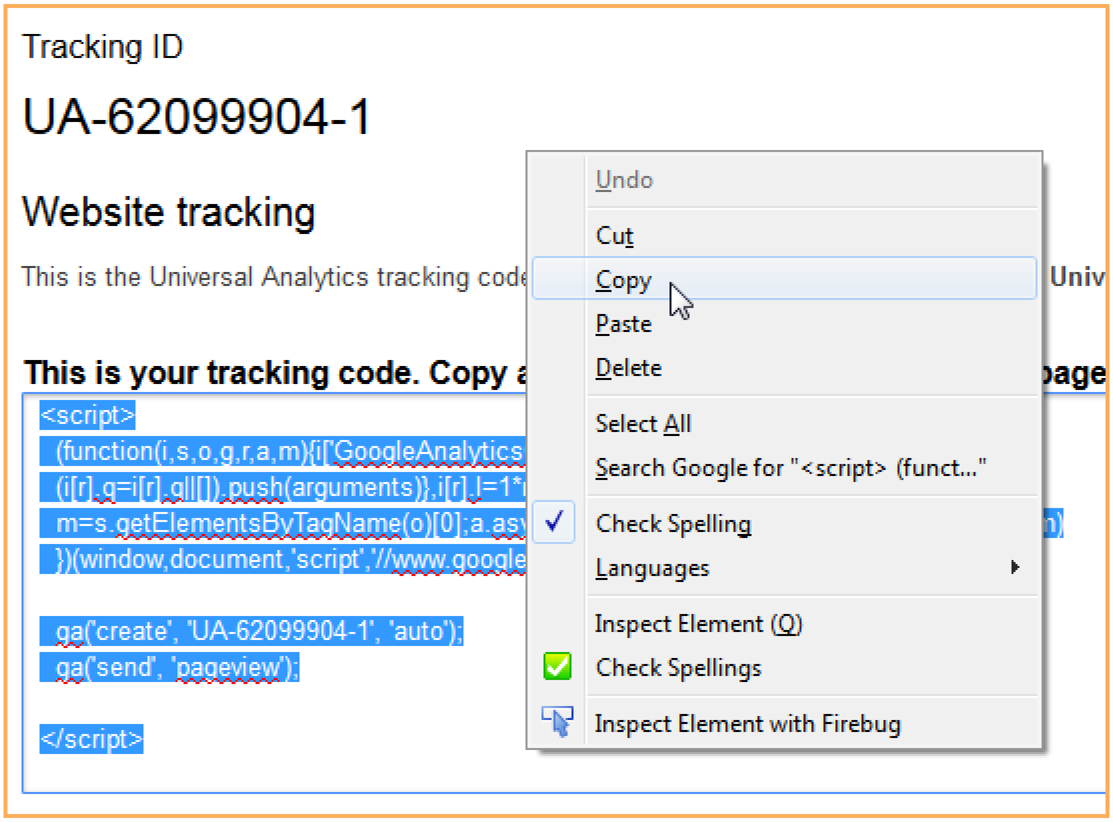
Getting set up with Google Analytics

To get set up with Google Analytics, follow these steps:

1. Go to http://www.google.com/analytics.
2. You'll be prompted to sign into your Google account or create one.
3. After you sign into your Google account, you'll be asked to sign up for Google Analytics. Click **Sign up** to begin setting up your Google Analytics account.
4. On the New Account page, you choose an account name (which can be any identifier you want), enter your website's name and URL, and set your time zone.

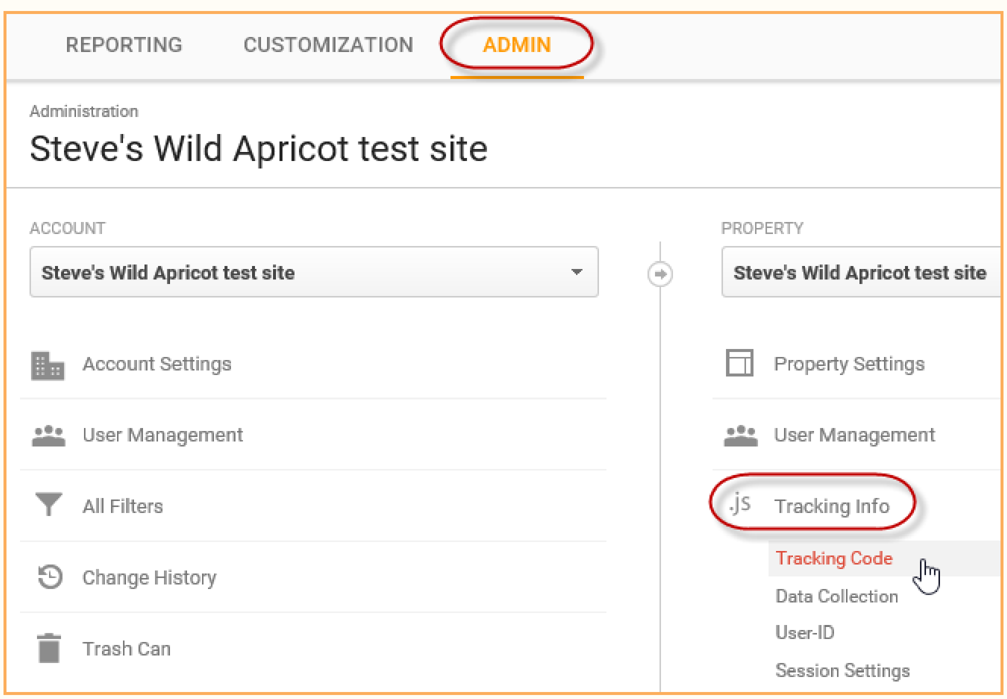


5. Under Data Sharing Settings, choose whether you wish to share your analytics data with Google.
6. Click the **Get Tracking ID** button.
7. Click **I agree** to agreeing to the user agreement.
8. From the Tracking Info page that appears, copy the tracking code.

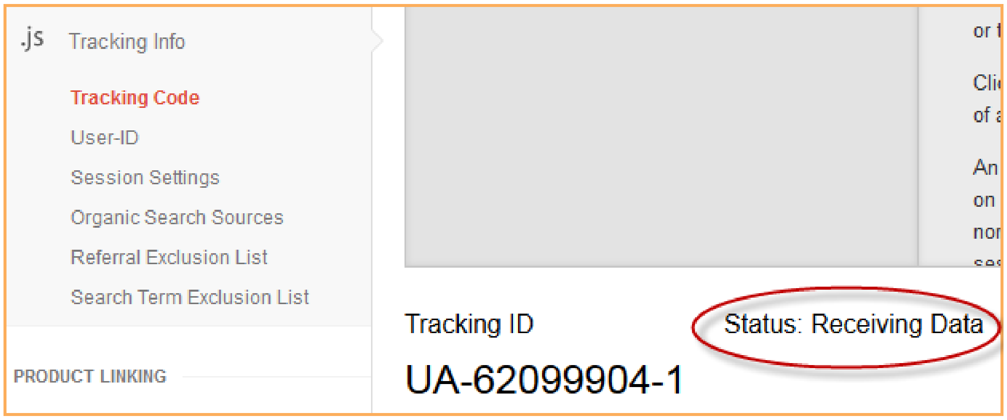


9. Log into your Wild Apricot site.
10. Click the **Settings** menu then click **Global JavaScript** (under **Site settings**).
11. On the **Global JavaScript** screen that appears, paste the code from Google Analytics. If there are other scripts already there, be sure not to overwrite any of them.
12. Click the **Save** button.
13. Return to Google Analytics, reload or refresh the page, and check the tracking status.

If you're having trouble finding the tracking code page again, click the **Admin** tab at the top of your Google Analytics screen then click **Tracking Info** under **Property** and choose the **Tracking code** option.



Once the tracking status appears as *Tracking Installed*, Google Analytics will begin tracking your site. If the status appears as *Receiving Data*, that means Google Analytics has already begun tracking your site.

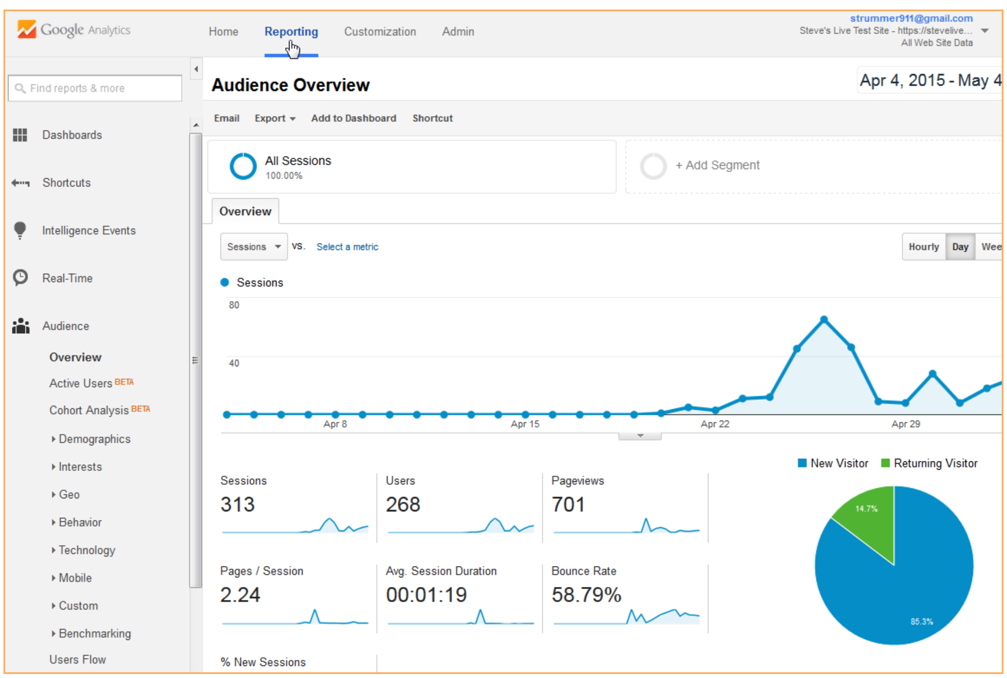


It may take up to 48 hours for Google to activate the tracking code.

Using Google Analytics

Once you've set up your Google Analytics account, visits to your site will be tracked. Previous site traffic – which took place before tracking was set up – will not be included in your site statistics.

To view tracking reports for your site, click the **Reporting** option at the top of the screen.



The traffic recorded by Google Analytics tends to be 3-4 hours in the past, so when you first set it up, you'll likely see no traffic at all.

On this page:

- Getting set up with Google Analytics
- Using Google Analytics

File management

File management

Each Wild Apricot account includes space to store your files (documents, pictures, etc.) as well as a built-in file manager to help your organize your files. Your files can be added to or linked from the events, emails, invoices, and pages you create. Or, you can share a link to the file by copying its address from its file properties.

Uploading files

There are three ways that you can upload files:

- While editing any web page, page template, event description, email, or email template by using the **File** or **Image** buttons on the content editor toolbar. Anyone who has full administrative or website editor access can upload images and other files. See Inserting pictures and Inserting documents and files.
- Using the **Files** screen (described below).
- Directly from your desktop computer using WebDAV. Using WebDAV allows you to copy multiple files or folders at the same time.

> FTP access to your Wild Apricot files is not available due to security considerations.

File upload and storage limits

The limit on the size of any individual file uploaded to your Wild Apricot account is 100 MB.

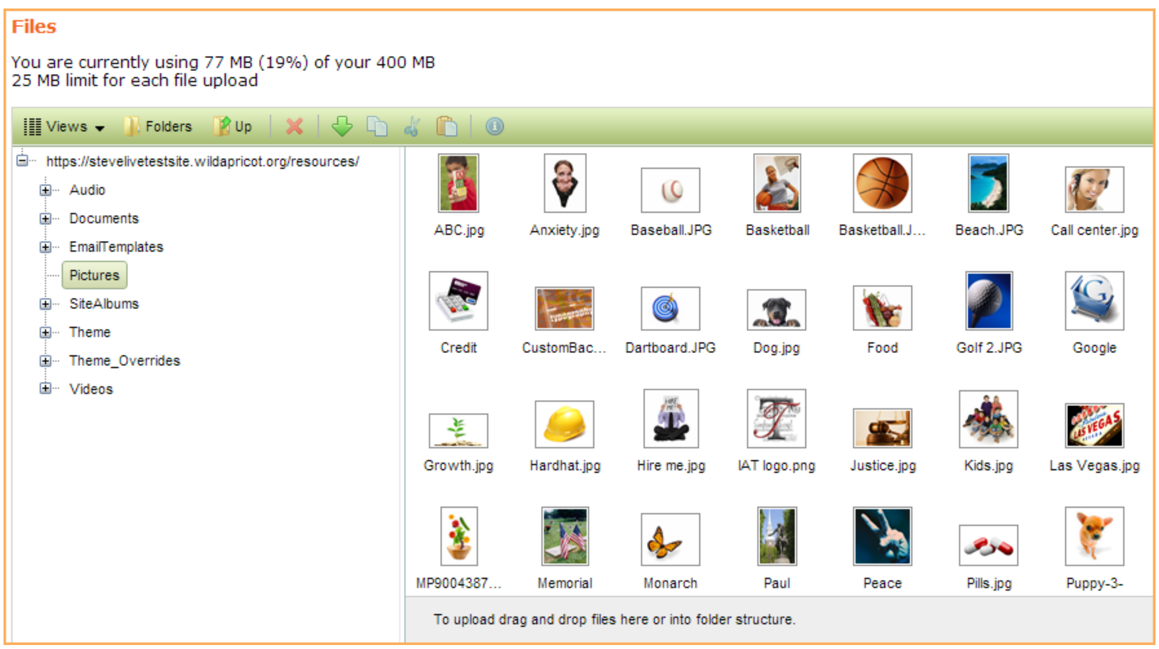
To ensure proper service levels to all our clients, your account also has an overall file storage limit, which differs based on your billing plan.

	Trial	Free	Group	Community	Professional	Network	Enterprise
Overall storage limit	100 MB	100 MB	2 GB	2 GB	2 GB	2 GB	2 GB

> Member photos and Member photo albums are not included in the limit. So, even when you reach your file limit, your members will still be able to add more photos to their profiles.

Managing files using the Files screen

You can upload, view, and manage your files using the **Files** screen. To display the **Files** screen, click **Files** under the **Website** menu.



The **Files** screen is similar to the one used for inserting documents and images when editing web pages, with some small differences:

- To change the view, you use the **Views** drop down menu at the top of the window. You can control the size of the file thumbnails or

choose to display file details (including file size) instead of thumbnails.
- You can turn the folder pane on or off using the **Folders** button.

Clicking on any folder will show the contents of that folder (files and/or subfolders). You can navigate through subfolders by clicking on the plus sign (**+**) in the folder pane or by double clicking on the folder icon in the file pane.

Right clicking on a folder within the folder pane will display options for that folder, including an option to upload files to the folder.

Right clicking on a file within the file pane will display options for that file, including the ability to update the file.

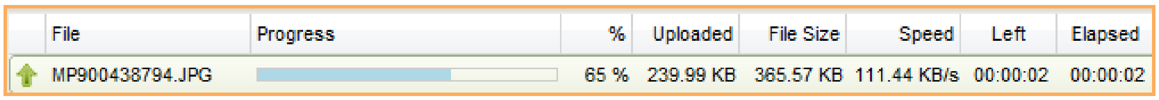
Right clicking in the middle of the file pane will displays options to create new folders and change your views.

Uploading files using the Files screen

To upload one or more files using the **Files** screen, follow these steps:

1. Select the folder where you want the file(s) to be stored.
2. Click the **Browse** button.
3. Select the folder on your computer or network containing the file(s).
4. Select one or more files you want to upload.
5. Click **Open**.

You can monitor the progress of the upload in the area below the file and folder panels.

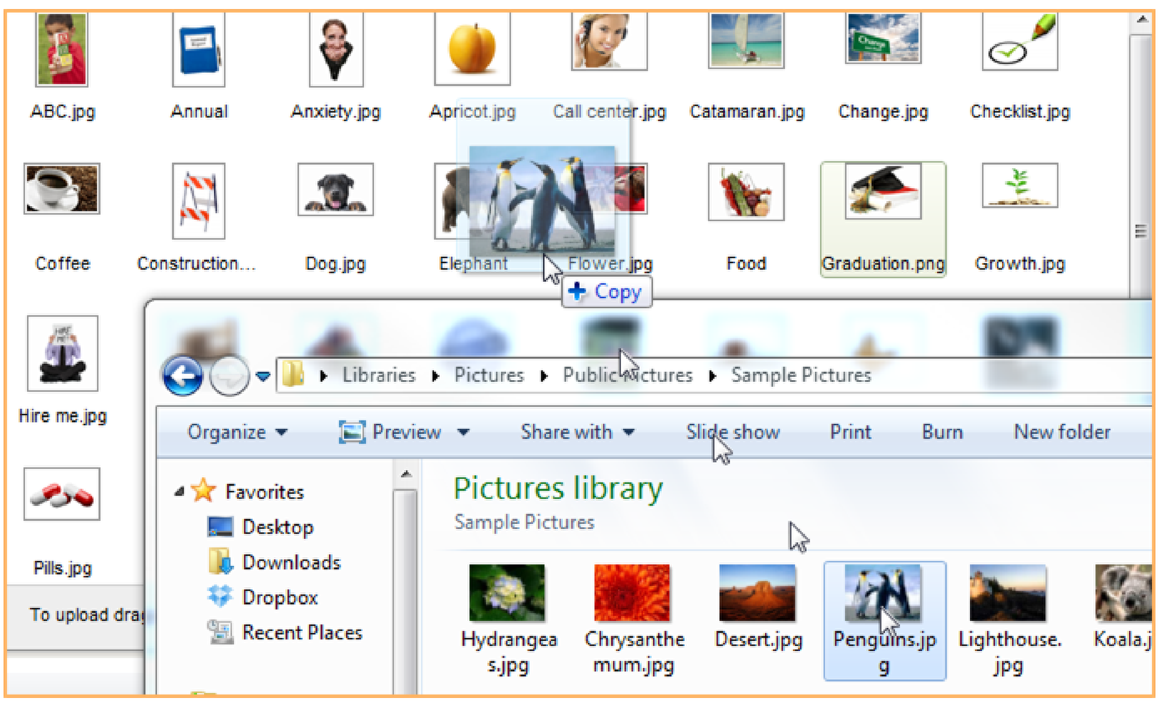


Wild Apricot allows you to upload many common file types. See [Complete list of supported file types](). If you need to upload a file of a different type (extension), please contact support and we will considering adding it.

> ⚠ Before you upload files, you should check to make sure you don't exceed your overall file storage limit, or your single file upload limit.

Dragging and dropping files

You can drag and drop a file to another location on the **Files** screen, or drag and drop a file from a folder on your computer onto the **Files** scr een.



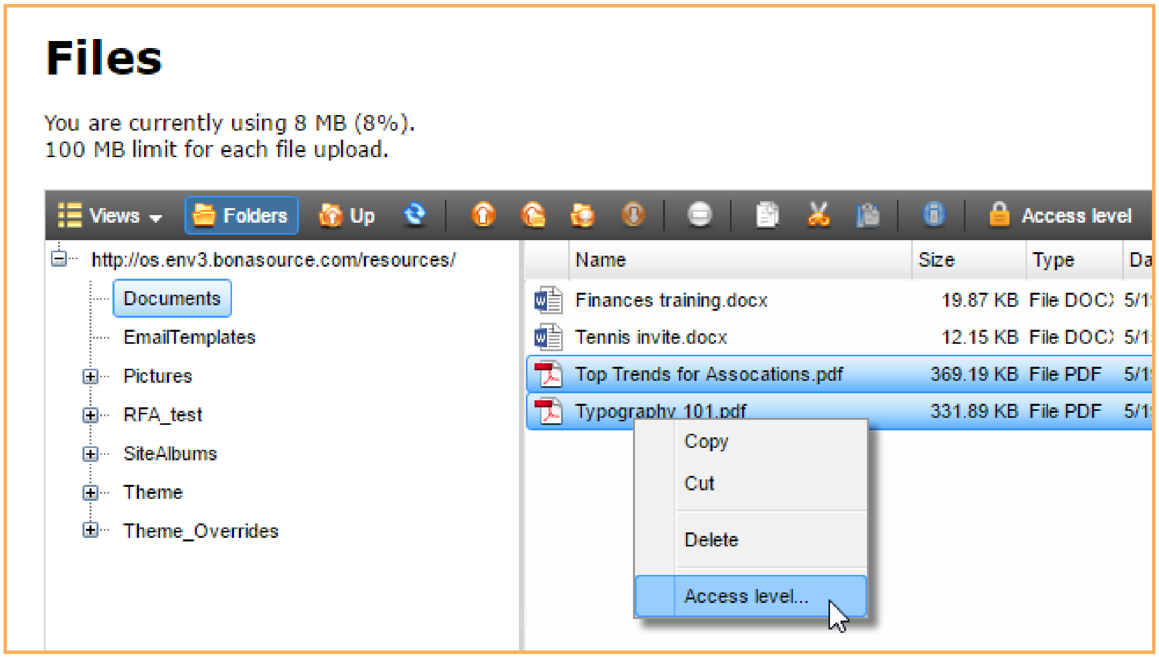
Restricting file access

You can restrict access to files, one at a time or several at once, from the Files screen. You can also restrict file access from the Insert dialog when adding a picture or document. For more information, see Restricting access to files.

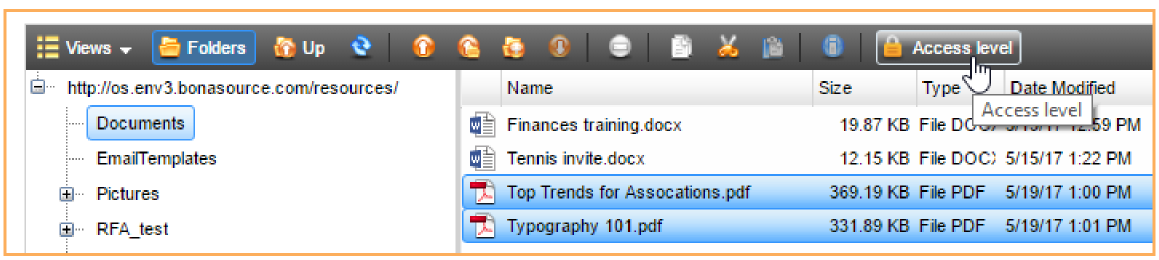
> ⚠ If you do not explicitly restrict file access, then all files will be accessible via a direct link, even if you uploaded them via a page with restricted access. Unrestricted files can be access at *http://your_site_domain/resources/path/filename* (where *path* is the name of the folder and *filename* is the name of the file). For example, a file called *coffee.jpg* in the *Pictures* folder on the *nycs.wildapricot.org* site can be accessed using *http://nycs.wildapricot.org/resources/Pictures/coffee.jpg* .

To set access restrictions for individual files on the Files screen, follow these steps:

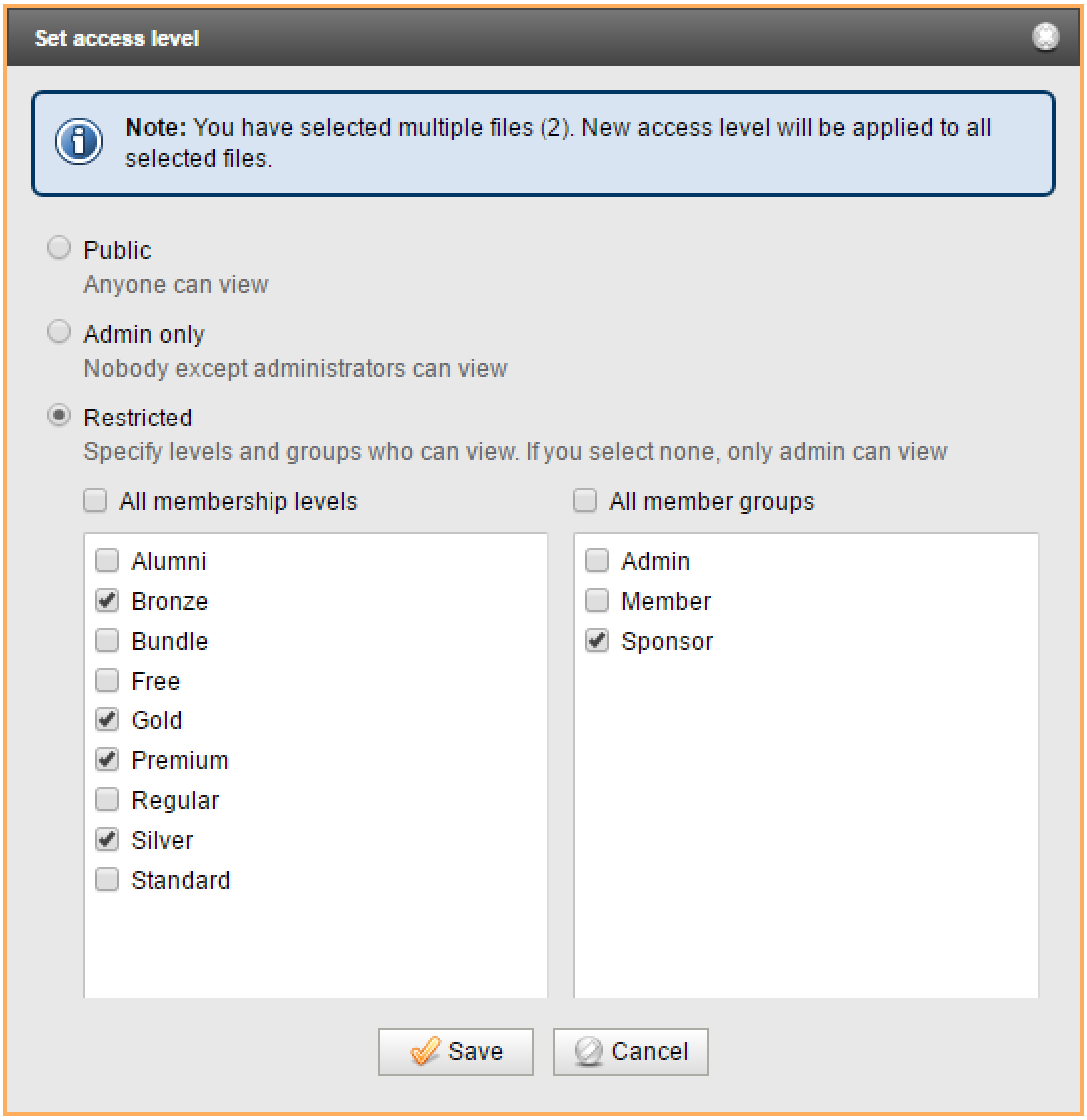
1. Display the file or files you can want to restrict in the files pane on the right.
2. Select the file or files you want to restrict.
3. Right click over the selected file or files and select the **Access level** option...



...or click the **Access level** button within the toolbar.

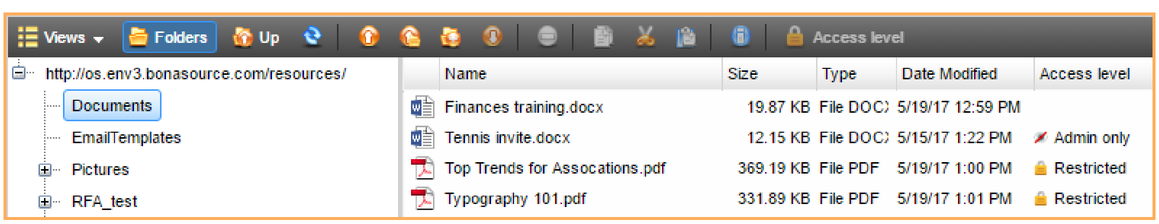


4. From the Set access level dialog that appears, choose the type of users you want to be able to access the file(s).

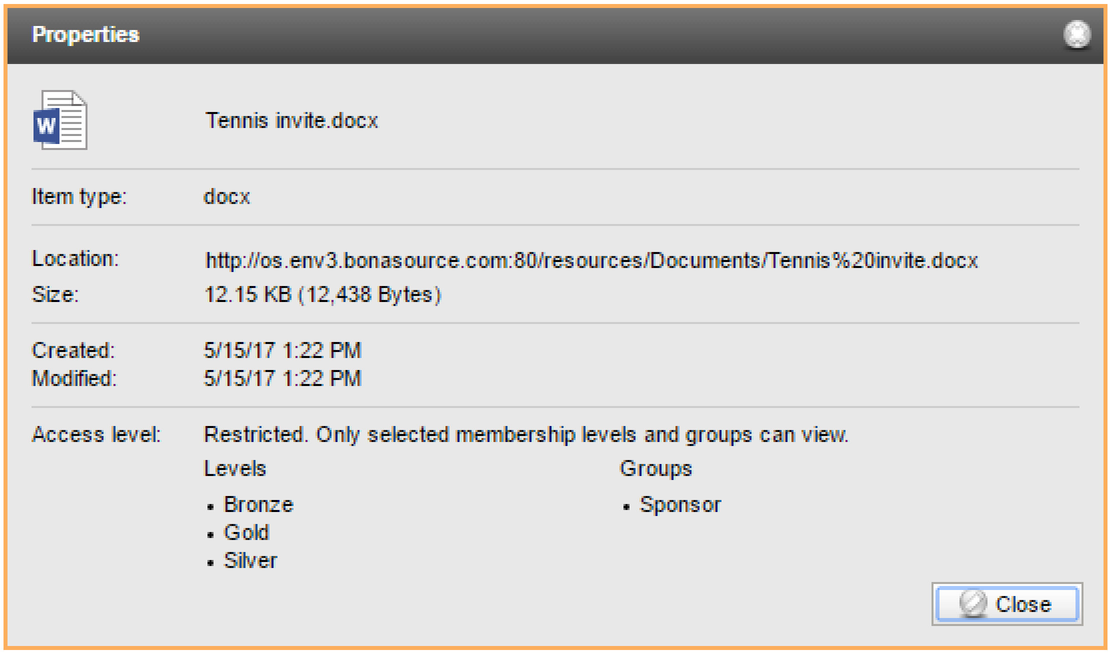


5. Click the **Save** button to save your changes.

Within the files pane on the right, restricted files will be flagged by icons under the **Access level** heading indicating the access level.



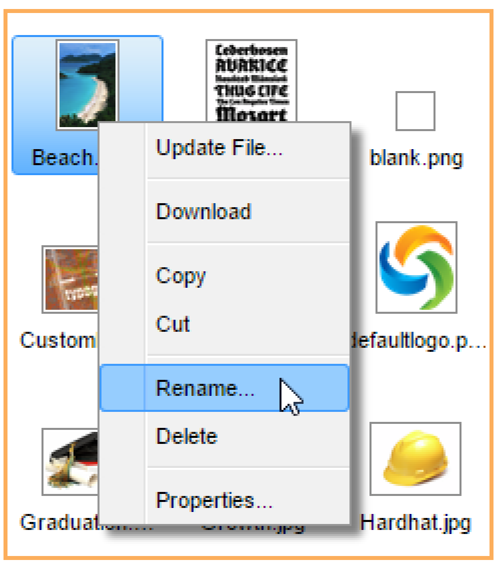
The access restrictions will appear within the properties for individual files.



To view the properties for individual files within the Files screen, right click over the file and select the **Properties** option.

File options

When you right click over file within the file pane, a number of file options appear.



> ⚠ If you use this options to rename, move, or delete a file, any links to that file will not be updated.

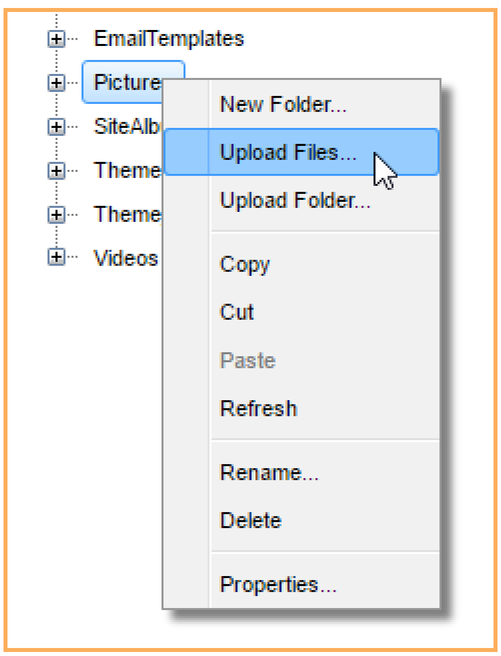
These options are described below.

Option	Description
Update file	Upload a new file to replace the current one.
Download	Open the file your browser.
Copy	Copy the file to the clipboard.
Cut	Copy the file to the clipboard and remove it from its current location.

Rename	Change the file name.
Delete	Remove the file from its current location.
Properties	Displays the properties of the file.
Access level	Choose the type of users you want to be able to access the file. The following options are available: **Public** Anyone can view the file, whether they are members or not, and logged in or not. **Admin only** The file can only be viewed by a full site administrator. **Restricted** Only contacts who belong to one of the selected membership levels or member groups can view the file. When you click this option, check boxes appear for each membership level and member group you have set up. Check each of the levels and groups you want to grant access to. If you restrict access by both membership levels and member groups, then members who belong to any of the selected levels **or** groups will be able to access the file. If you check the **All levels** or **All groups** option then all levels or groups – including any levels or groups added in the future – will be selected.

Folder options

When you right click over a folder, a number of folder options appear.



These options are described below.

Option	Description
New folder	Create a new folder under the current one.
Upload file(s)	Upload files to the current folder.
Upload folder	Upload folder with all its files to the current folder.
Copy	Copy the folder to the clipboard.

Cut	Copy the folder to the clipboard and remove it from its current location.
Paste	Paste the contents of the clipboard (file or folder) to the current folder.
Refresh	Refreshes the contents of the folder.
Rename	Change the name of the folder.
Delete	Remove the folder from its current location.
Properties	Displays the properties of the folder.

Special folders

The following are special folders that you cannot rename or delete.

Theme folder

The *Theme* folder contains important information about the look and feel of your site. This is where your Cascading Style Sheets (CSS) files reside (which define your website look and feel). It is also where all your theme settings are stored, regardless of whether you used one of our themes or customized your own. Because it is so important to your website:

- you cannot delete *Theme* folder
- you cannot delete or move the *user.css* file.
- you cannot modify, move, or delete the *customStyles.css* file. The *customStyles.css* file can be edited from the Colors and styles screen.

Theme_Overrides

If you have enabled theme overrides, a *Theme_Overrides* folder will be added to the *Resources* folder on your site. This folder will contain theme-specific subfolders.

SiteAlbums folder

The *SiteAlbums* folder can be used to view and upload images to your photo albums. Inside the *SiteAlbums* folder, there is a folder for each of the photo album gadgets found on your site (if any), each named with the corresponding album ID.

File and folder name limitations

Your file and folder names **must not** contain any the following characters: * / : ? < > " % & or double spaces.

If your folder name has any of the following characters: +, # they will be replaced with an underscore (_).

Troubleshooting

Right clicking

Right clicking to view file and folder options within the **Files** screen does not work in Safari on the Mac. Instead of right clicking, hold down the **Control** button then click to display the menu.

Dragging and dropping

Dragging and dropping may not work in some browsers and may display misleading error messages such as *File type not supported* . In this case, just browse to the file instead.

Cannot upload file, getting failed to upload error

This is usually due to special characters in the filename (e.g. %, $, ~, & etc). Try renaming your file using letters of the alphabet only.

Also, check the file size and your storage capacity. See File upload limits section above.

Thumbnails are not being displayed

The **Files** screen can only display thumbnails for graphic images that use the RGB color model. If you upload an image that uses the CMYK color model (used for high quality printing), a placeholder thumbnail will be used in place of an actual thumbnail.

For more information on color models, click here.

Uploading multiple files using Internet Explorer 10

When uploading multiple files to the **Files** screen using Internet Explorer 10, the first file selected will not be uploaded. To upload it, select it alone before uploading.

Video: Managing your files (5:41)

On this page:

- Uploading files
- File upload and storage limits
- Managing files using the Files screen
    - Uploading files using the Files screen
    - Dragging and dropping files
    - Restricting file access
    - File options
    - Folder options
    - Special folders
- File and folder name limitations
- Troubleshooting

See also:

- Uploading files in bulk using WebDAV
- Inserting pictures
- Inserting documents and files
- Photo albums

Restricting access to files

Restricting access to files

You can restrict access to individual files on your Wild Apricot site by membership levels and member groups. That way, only those who belong to the membership levels or member groups you choose can view a particular image or access a particular document.

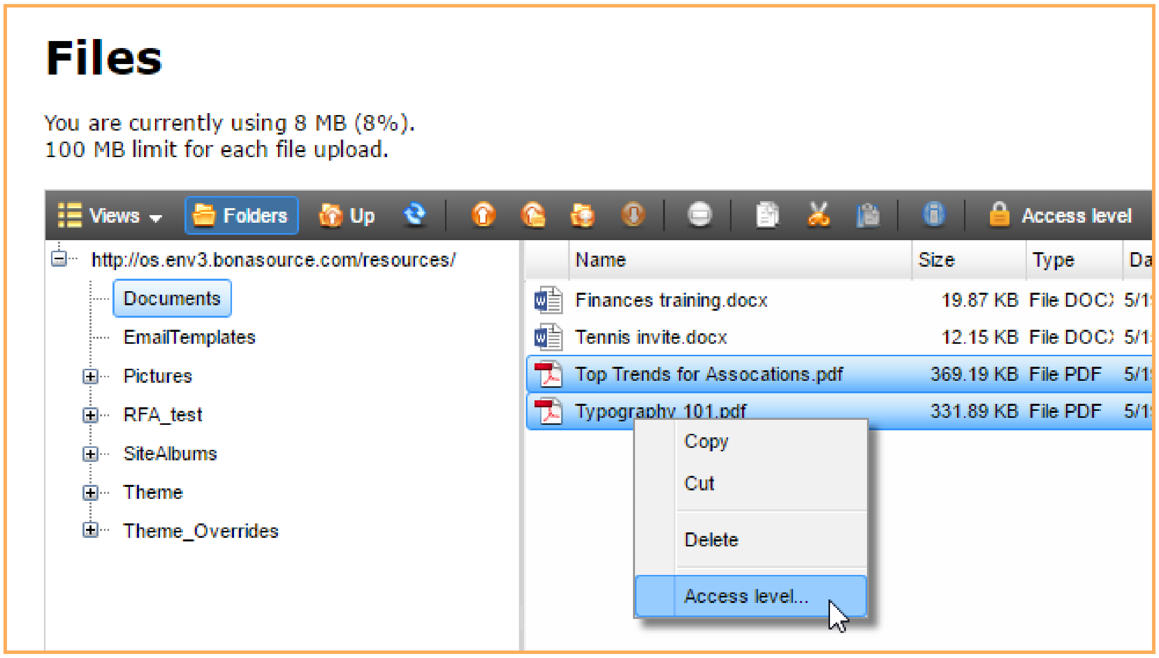
You can restrict access from the Files screen and from the Insert dialog when adding a picture or document.

Restricting access from the Files screen

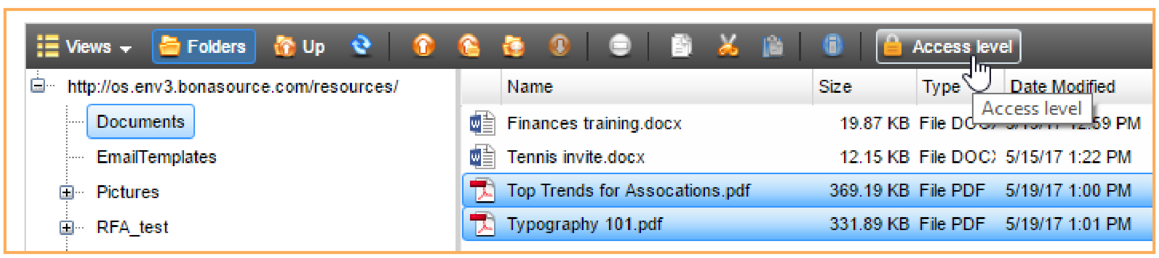
You can restrict access to files, one at a time or several at once, from the Files screen. To display the Files screen, click **Files** under the **We bsite** menu.

To set access restrictions for individual files on the Files screen, follow these steps:

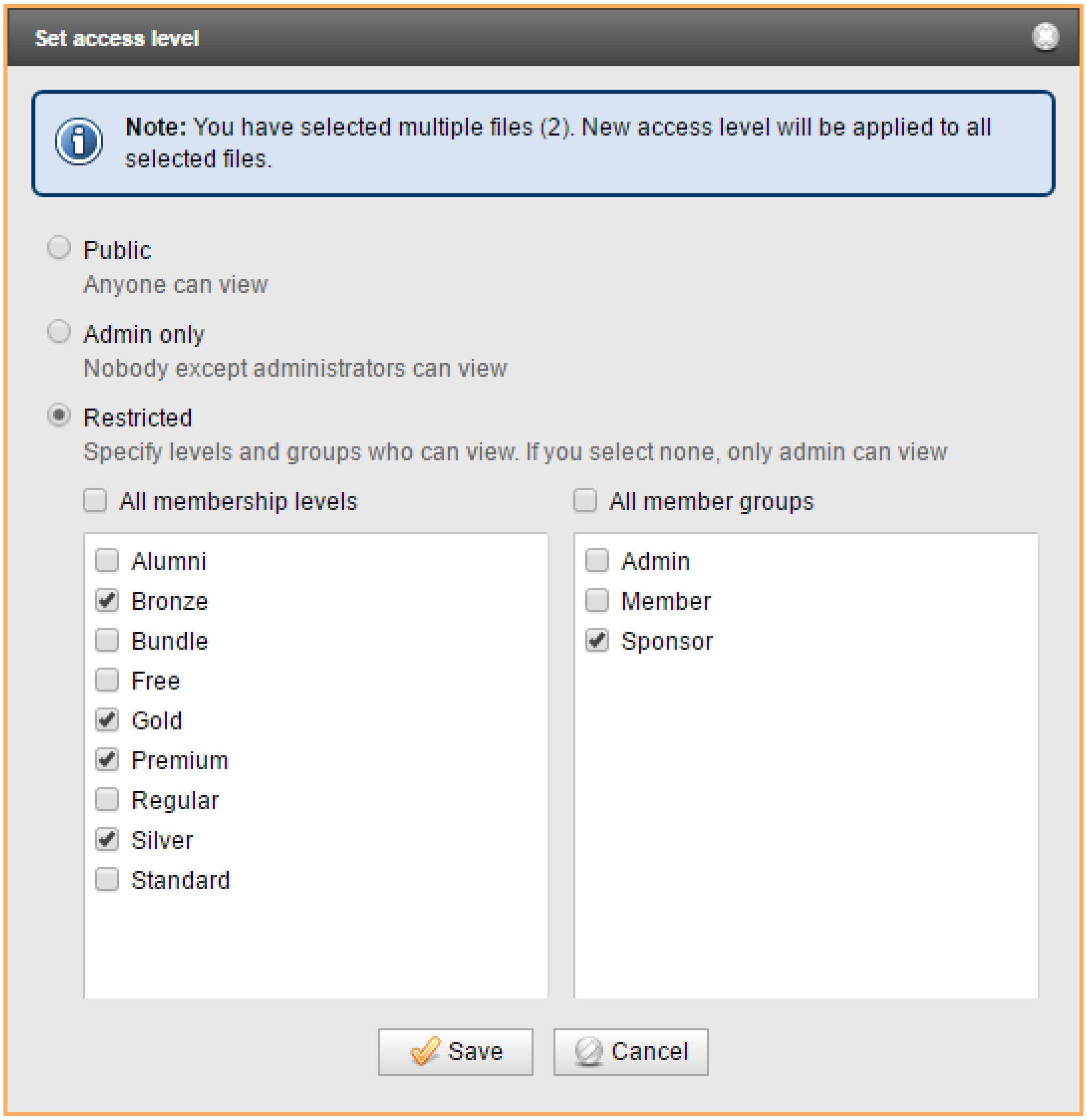
1. Display the file or files you can want to restrict in the files pane on the right.
2. Select the file or files you want to restrict.
3. Right click over the selected file or files and select the **Access level** option...



...or click the **Access level** button within the toolbar.

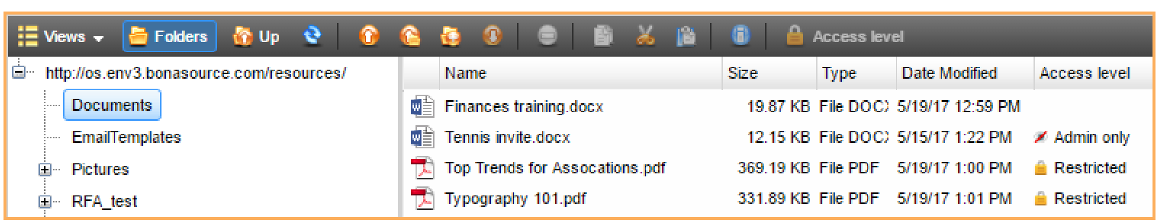


4. From the Set access level dialog that appears, choose the type of users you want to be able to access the file(s).

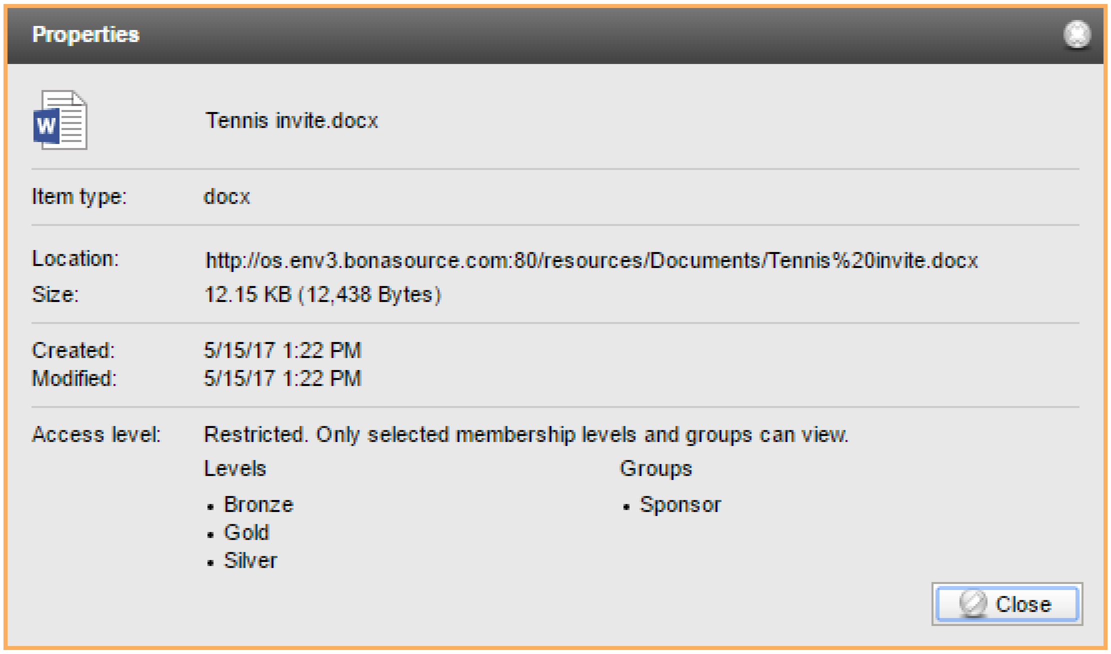


5. Click the **Save** button to save your changes.

Within the files pane on the right, restricted files will be flagged by icons under the **Access level** heading indicating the access level.



The access restrictions will appear within the properties for individual files.



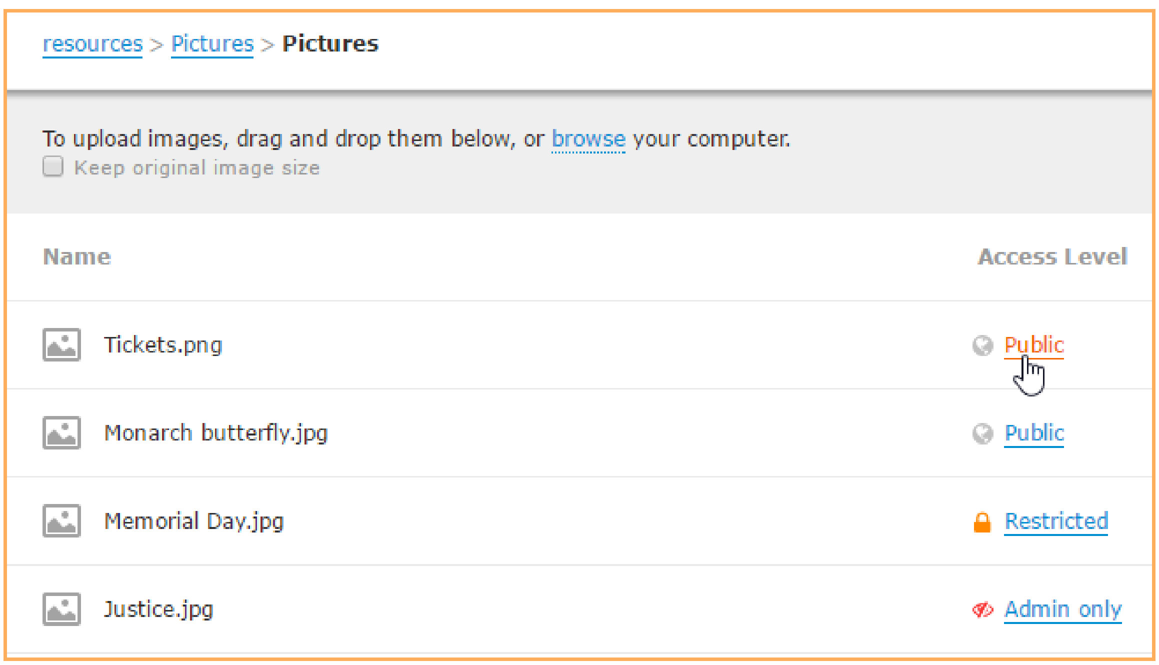
To view the properties for individual files within the Files screen, right click over the file and select the **Properties** option.

Restricting access from the Insert dialog

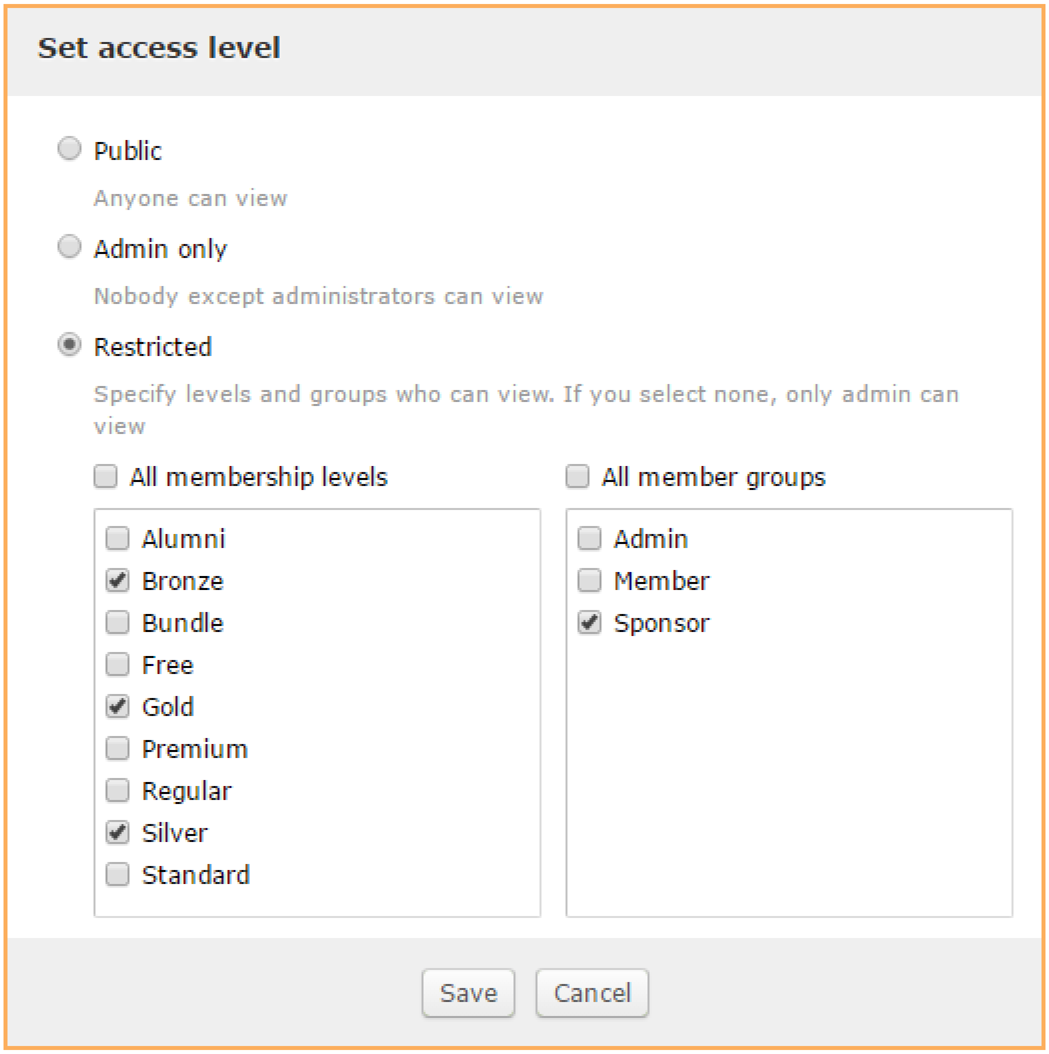
You can restrict access to files, one at a time, from the Insert dialog that appears when you are inserting a picture or document. You can only set access restrictions from list view, not icons view.

To set access restrictions for a file from list view, follow these steps:

1. Click the link under the **Access level** heading for the file you want to restrict.

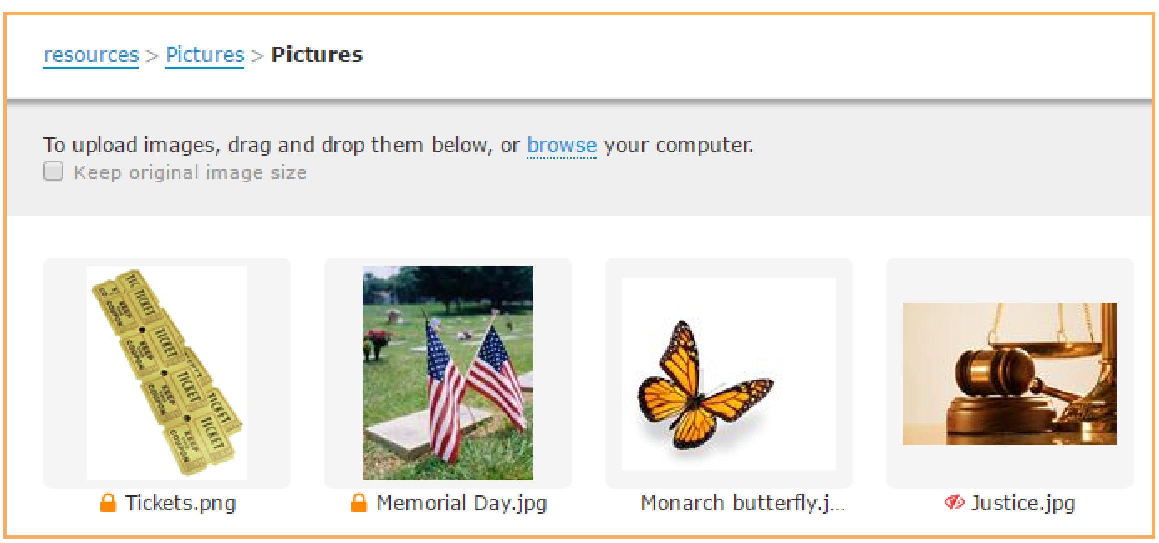


   Depending on the current access level, the link might appear as **Public**, **Admin only**, or **Restricted**.
2. From the Set access level dialog that appears, choose the type of users you want to be able to access the file.



3. Click the **Save** button to save your changes.

In icons view, files with restricted access will be flagged by an icon beside the file name.



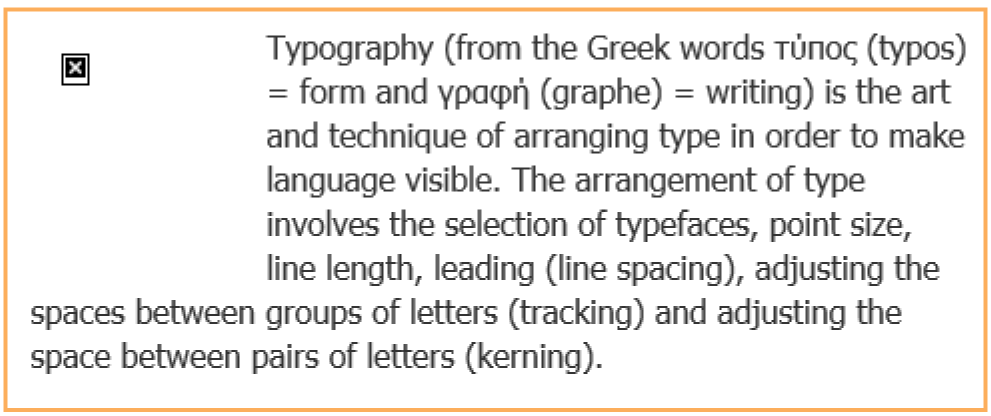
Access level options

The following access levels options are available when restricting access to files:

Option	Description
Public	Anyone can view the file, whether they are members or not, and logged in or not.
Admin only	The file can only be viewed by a full site administrator.
Restricted	Only contacts who belong to one of the selected membership levels or member groups can view the file. When you click this option, check boxes appear for each membership level and member group you have set up. Check each of the levels and groups you want to grant access to. If you restrict access by both membership levels and member groups, then members who belong to any of the selected levels **or** groups will be able to access the file. If you check the **All levels** or **All groups** option then all levels or groups – including any levels or groups added in the future – will be selected.

How restricted files appear to unauthorized users

- Restricted and admin-only images will appear on public pages as a broken image link.



- Within slideshows and photo albums, restricted and admin only images will simply not appear to users without access
- When a logged in user opens a link to a file and doesn't have the required access level, they will see an **Access denied (403)** error.
- When a user who is not logged in opens link to a file and doesn't have the required access level, they will be redirected to the **Author ization required** system page.
- When a member, logged-in contact, or public visitor opens a link to an admin-only file, they will see a **Resource not found (404)** erro r.

On this page:

See also:

- File management
- Inserting pictures
- Inserting documents and files

Complete list of supported file types

Complete list of supported file types

- accdb

- accde
- accdr
- accdt
- appcache
- avi
- bin
- bmp
- bz2
- cfg
- chm
- class
- css
- csv
- dat
- db
- default
- dif
- djv
- djvu
- doc
- docm
- docx
- dot
- dotm
- dotx
- dxf
- emf
- eot
- eps
- epub
- flac
- flv
- gdb
- gem
- gif
- gpx
- gz
- htc
- htm
- html
- ico
- ics
- initial
- jar
- jnlp
- jpeg
- jpg
- js
- keynote
- kml
- kmz
- less
- lzma
- m4a
- manifest
- mbox
- mdb
- mdi
- mht
- mhtml
- mobi

- mov
- mp3
- mp4
- mpd
- mpp
- mpt
- mpx
- mscx
- mscz
- msg
- odbc
- ogg
- onepkg
- onetmp
- onetoc
- onetoc2
- pages
- pde
- pdf
- png
- pot
- potm
- potx
- ppa
- ppam
- pps
- ppsm
- ppsx
- ppt
- pptm
- pptx
- prn
- psd
- psp
- pub
- rar
- res
- rpt
- rtf
- sib
- skp
- sldm
- sldx
- slk
- svg
- swf
- tar
- taz
- tbz
- tcx
- template
- tgz
- thmx
- tif
- tiff
- tlz
- tmp
- tpl
- ttf
- txt
- txz

- vcard
- vcf
- vdx
- vlw
- vsd
- vss
- vst
- vsw
- vsx
- vtx
- wav
- wma
- wmf
- wmv
- woff
- wpd
- wpl
- xla
- xlam
- xlc
- xlm
- xls
- xlsb
- xlsm
- xlsx
- xlsxm
- xlt
- xltm
- xltx
- xlw
- xml
- xps
- xsd
- xz
- z
- zip

Uploading files in bulk using WebDAV

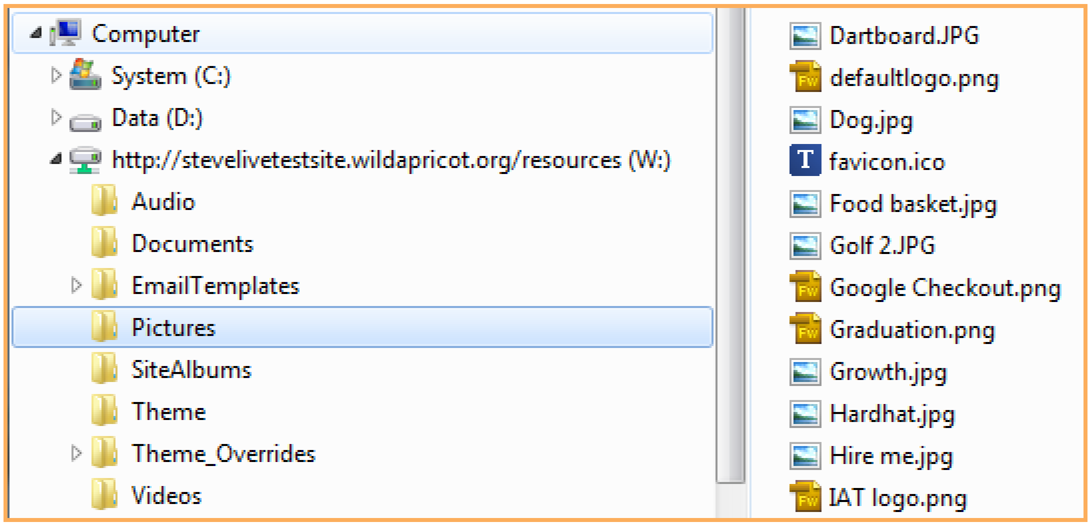
Uploading files in bulk using WebDAV

Your Wild Apricot account includes space to store files such as documents, pictures, and videos. You can link to these files from pages on your Wild Apricot site, or you can share a link to these files with others inside or outside your organization.

To manage your files – upload, download, organize, delete, or rename them – you can go to the Files screen within Wild Apricot, or you can use WebDAV to access your files independently of Wild Apricot. Using WebDAV allows you to copy multiple files or folders at the same time.

What is WebDAV?

WebDAV is a method for remotely managing files over the internet, similar to FTP. With WebDAV, you can access files stored in your Wild Apricot account using the same interface as you do your local files. Your Wild Apricot account appears as another drive on your computer. Once you connect to it, you can view and manage the folders and files stored within it. You can perform all the same actions – drag and drop, rename, delete – that you would on files and folders stored on your own computer.



While you can also do this from the Files screen within Wild Apricot, WebDAV is much faster and easier, particularly if you are going to work with a large number of files.

Connecting to your site using WebDAV

To connect to your Wild Apricot site using WebDAV, you will need the following information:

- Your WebDAV address – *http://your_site_url/resources* or *http://your_site_url:80/resources* for Windows XP (where *your_site_url* is the URL of your Wild Apricot site e.g. *stevelivetestsite.wildapricot.org*).
- The email and password of a full site administrator.

> For secure access, replace *http* with *https* (only available for wildapricot.org domains). For more information, see Traffic encryption.

The steps for setting up WebDAV varies according to your operating system. Follow one of these links for detailed instructions on setting up WebDAV on your operating system:

- Setting Up WebDAV in Windows 7
- Setting Up WebDAV in Windows 8
- Setting Up WebDAV in Windows 10
- Setting Up WebDAV in Windows Vista
- Setting Up WebDAV in Windows XP
- Setting Up WebDAV in Mac OS X

Working with files in WebDAV

You can move, copy, rename, and delete any file or folder in your WebDAV directory the same way you would for any file or folder stored on your computer.

If you are using Windows XP, Windows Vista, or Windows 7, you can access your WebDAV files directly from applications such as Microsoft Office and Adobe Photoshop. Mac OS X does not support this.

The URL of any file you upload onto your Wild Apricot site is:

```
http://your_site_url/resources/file_path/file_name
```

- where *your_site_url* is the URL of your Wild Apricot site (e.g. *stevelivetestsite.wildapricot.org*), *file_path* identifies the folder (including any subfolders) in which the file is stored, and *file_name* is the name of the file (including extension). For example, a file called *logo.png* in the *Documents* folder on *stevelivetestsite.wildapricot.org* would be referenced as _http://stevelivetestsite.wildapricot.org/resources/documents/logo.png_.

> For secure access, replace *http* with *https* (only available for wildapricot.org domains). For more information, see Traffic encryption.

Wild Apricot WebDAV restrictions

- Not all file types are supported by Wild Apricot. See Complete list of supported file types.
- Maximum allowed file size is defined by your subscription plan (see Functionality by billing plan).
- File and folder names:
  - Your file and folder names **must not** contain any the following characters: * / : ? < > " % & or double spaces
  - If your folder name has any of the following characters: +, # those characters will be replaced with an underscore (_)
- Theme folder:
  - You cannot delete Theme folder.
  - You cannot delete or move the user.css file.
  - You cannot modify, delete, or move the customStyles.css file. The customStyles.css can only be edited from the Colors and styles screen.

Troubleshooting

- If you have problems connecting to WebDAV, try resetting your password in Wild Apricot. (For technically minded, this generates a new hashcode for WebDAV access.)

- If you enter the wrong email/password you may have to wait about 20 seconds before trying to connect with the correct credentials. This is due to a bug in the built-in Windows WebDAV client which stores and keeps sending the same login details for about 15 seconds.

- If your connection to WebDAV works but is slow, you may need to adjust your LAN Settings if you are using Windows. This setting is found in your **Control Panel > Network and Internet > Internet Options > Connections**. From this screen, uncheck the option to **a utomatically detect settings**.

> You can also use 3rd party WebDAV clients like https://cyberduck.io.

On this page:

Setting Up WebDAV in Windows 10

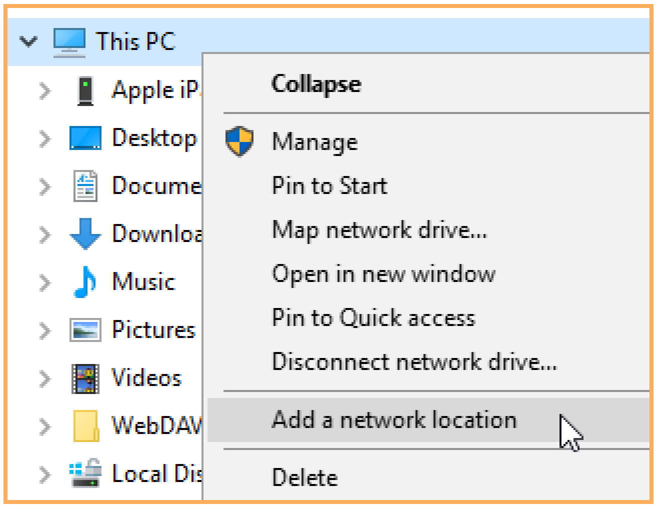
Setting Up WebDAV in Windows 10

You can use WebDAV to manage the files in your Wild Apricot account. You can map a network drive to your Wild Apricot account, then connect to the account.

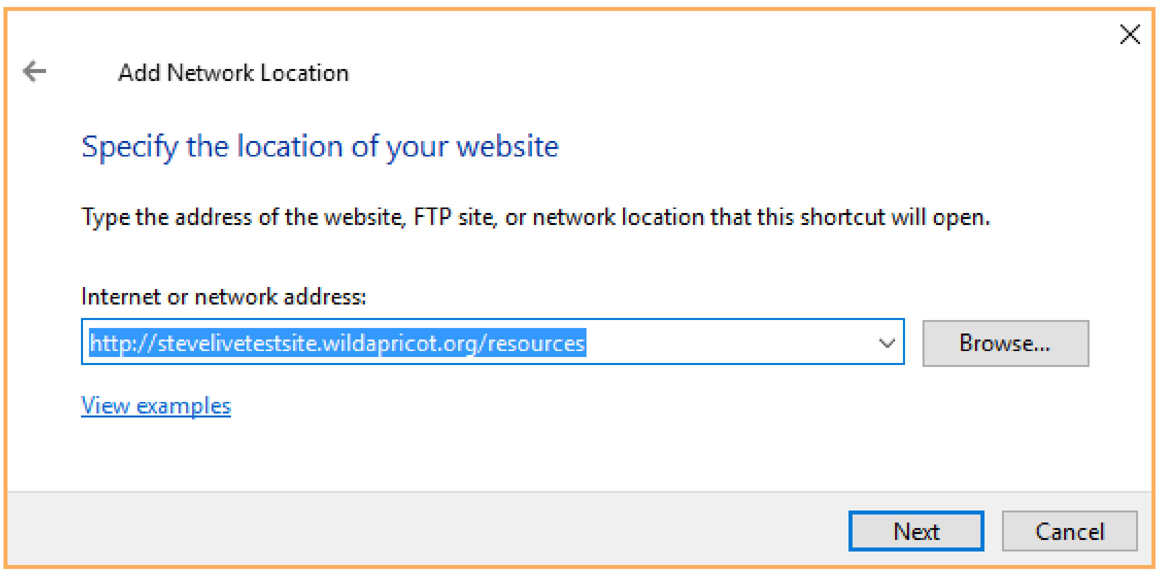
Connecting to your Wild Apricot account via WebDAV

To connect to your Wild Apricot account via WebDAV on Windows 10, follow these steps:

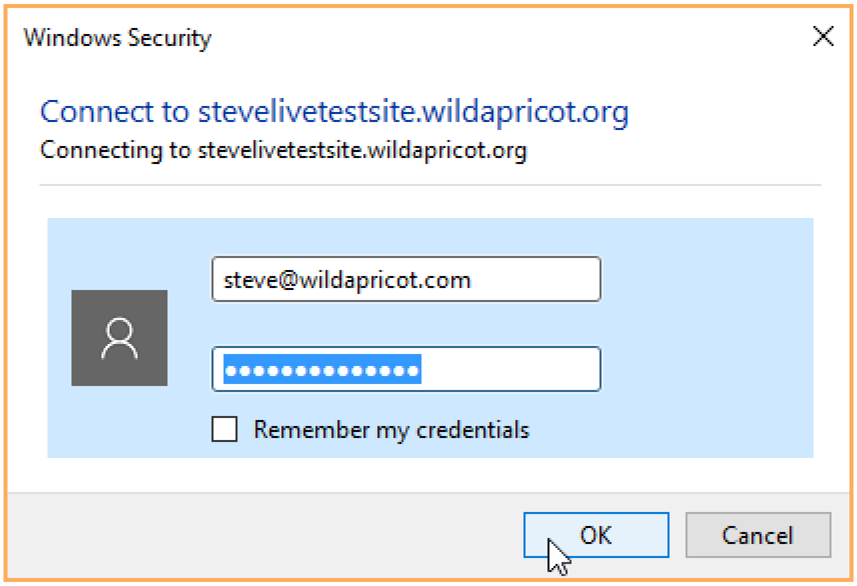
1. Display the Windows File Explorer. To display File Explorer, you can right click over the Start button and select **File Explorer** , or you can search for File Explorer by pressing the Windows key + S.
2. From the File Explorer, right click over **This PC** or **Computer** within the navigation pane on the left.
3. From the pop-up menu that appears, select **Add network location**.



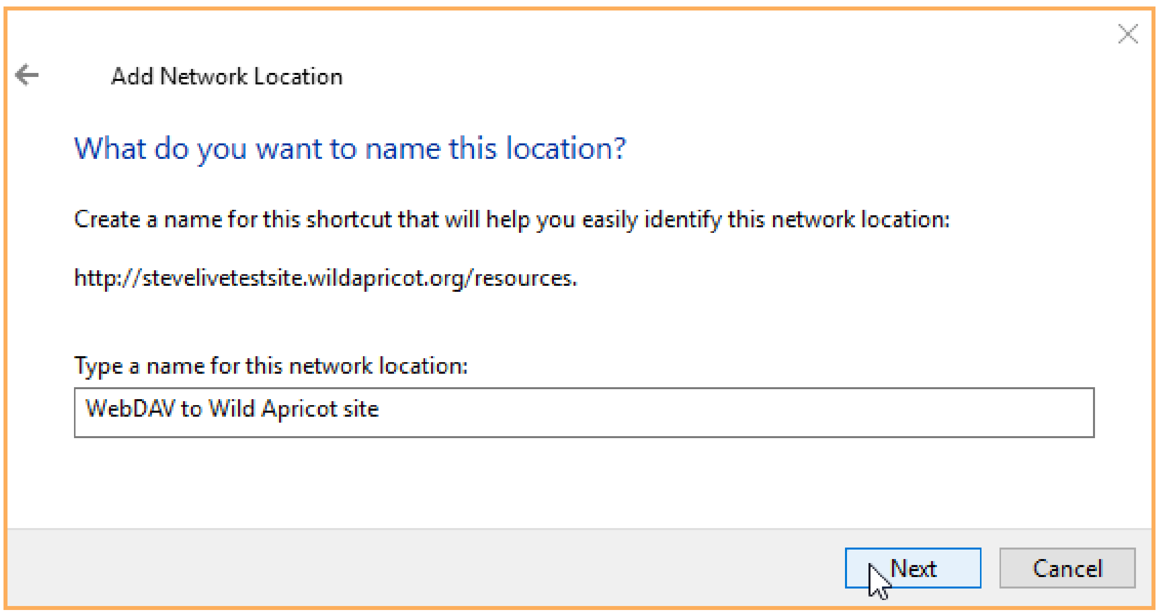
4. Within the Add Network Location Wizard, click the **Next** button.
5. On the next screen, click the **Choose a custom network location** option then click the **Next** button.
6. In the **Internet or network address** box on the next screen, enter *http://your_site_url/resources* (where *your_site_url* is the URL of your Wild Apricot site. For example, if your Wild Apricot site is *stevelivetestsite.wildapricot.org*, you would enter http://stevelivetestsite.wildapricot.org/resources.



7. Click the **Next** button.
8. When prompted, enter your Wild Apricot user name and password, and check the **Remember my credentials** checkbox.

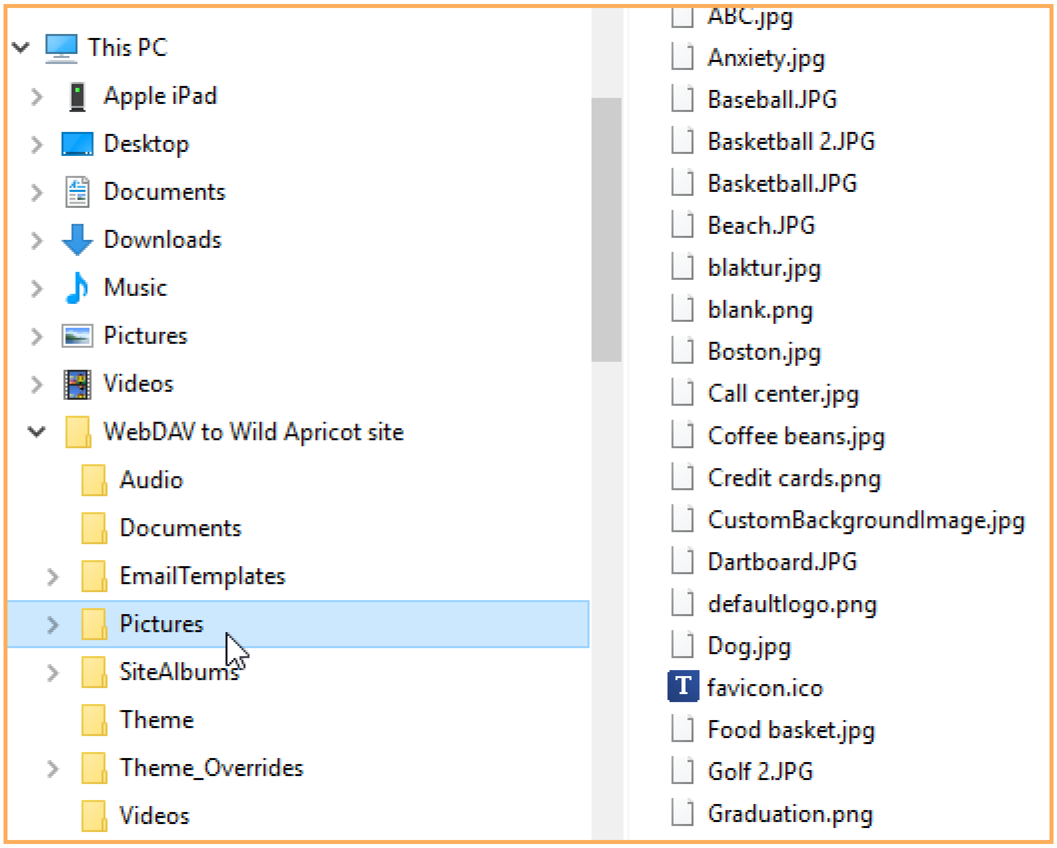


9. Click the **OK** button.
10. When prompted, enter a name for your WebDAV connection (e.g. WebDAV to Wild Apricot site) then click **Next**.



11. Click **Finish**.

Now you should see a WebDAV drive that you can expand to view folders and files in your Wild Apricot account.



You can access this drive in the future under the This PC or Computer listing in Windows Explorer. For more information, see Uploading files in bulk using WebDAV.

Setting Up WebDAV in Windows 8

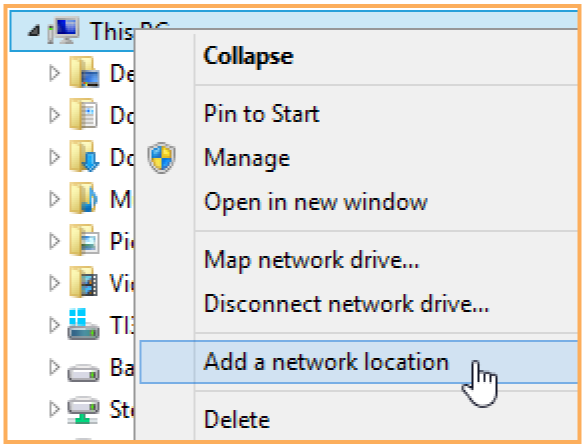
Setting Up WebDAV in Windows 8

You can use WebDAV to manage the files in your Wild Apricot account.

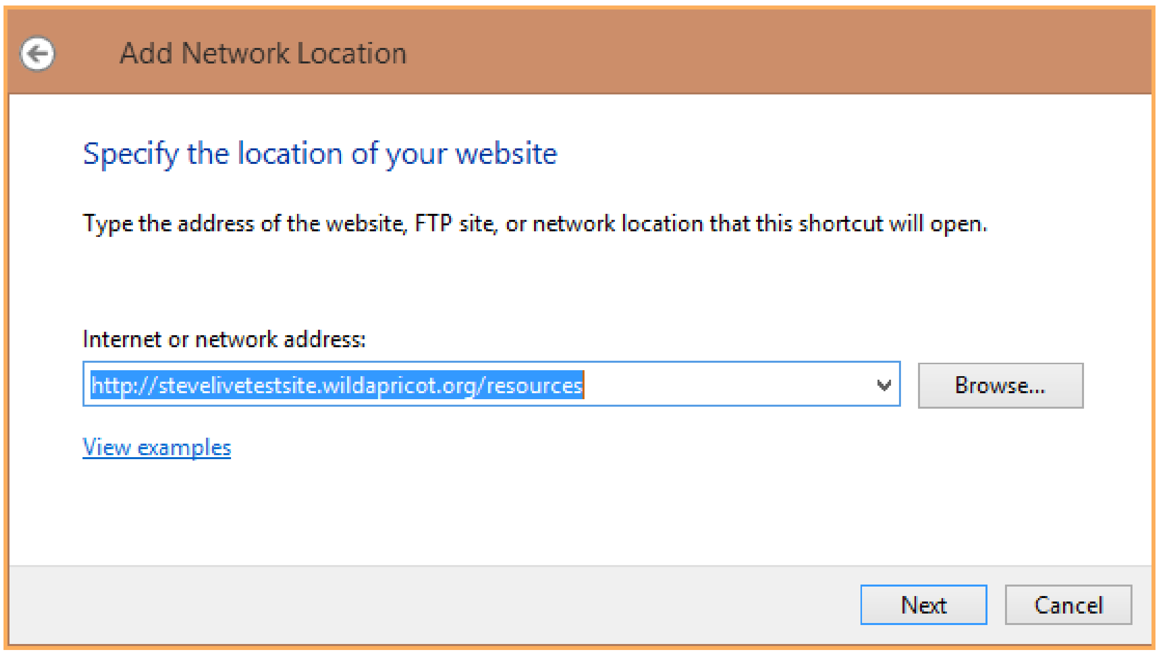
Connecting to your Wild Apricot account via WebDAV

To connect to your Wild Apricot account via WebDAV on Windows 8, follow these steps:

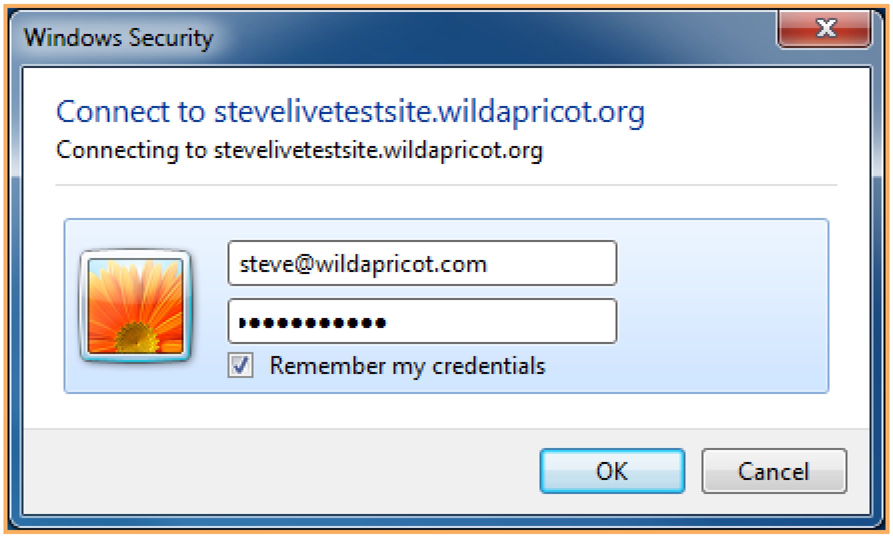
1. Display the Windows File Explorer. To display File Explorer, you can right click over the Start button and select **File Explorer** (Windows 8.1 or later), or you can search for File Explorer by pressing the Windows key + S.
2. From the File Explorer, right click over **This PC** or **Computer** within the navigation pane on the left.
3. From the pop-up menu that appears, select **Add network location**.



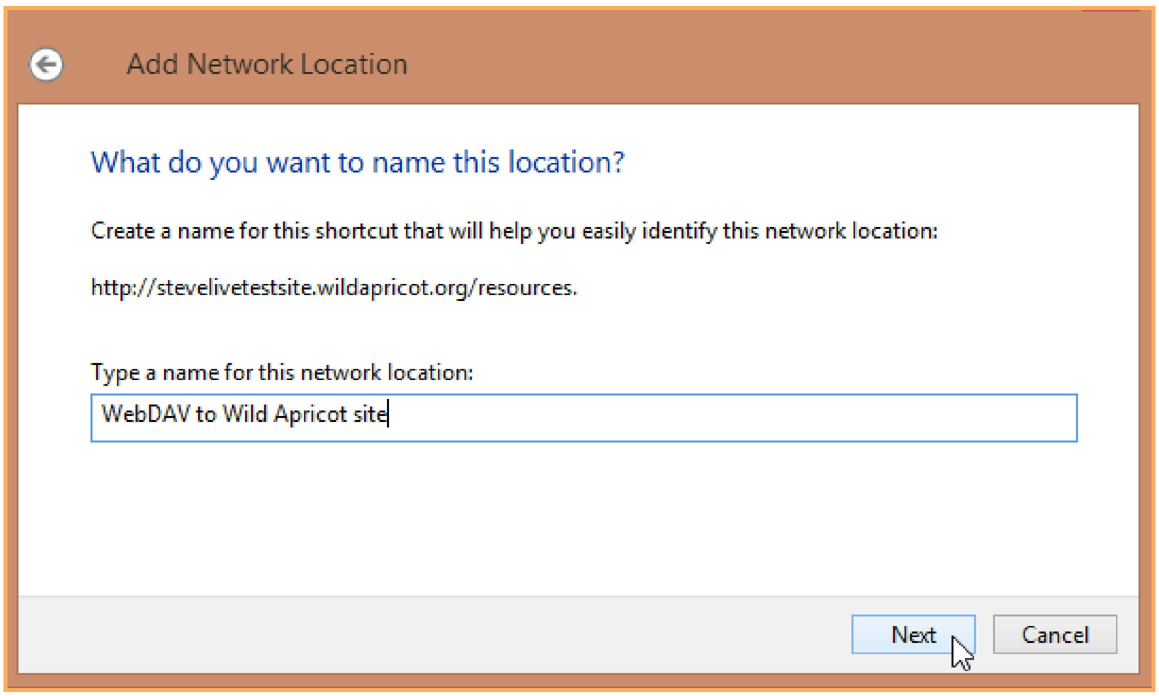
4. Within the Add Network Location Wizard, click the **Next** button.
5. On the next screen, click the **Choose a custom network location** option then click the **Next** button.
6. In the **Internet or network address** box on the next screen, enter *http://your_site_url/resources* (where *your_site_url* is the URL of your Wild Apricot site. For example, if your Wild Apricot site is *stevelivetestsite.wildapricot.org*, you would enter _http://stevelivetestsite.wildapricot.org/resources_.



7. Click the **Next** button.
8. When prompted, enter your Wild Apricot user name and password, and check the **Remember my credentials** checkbox.

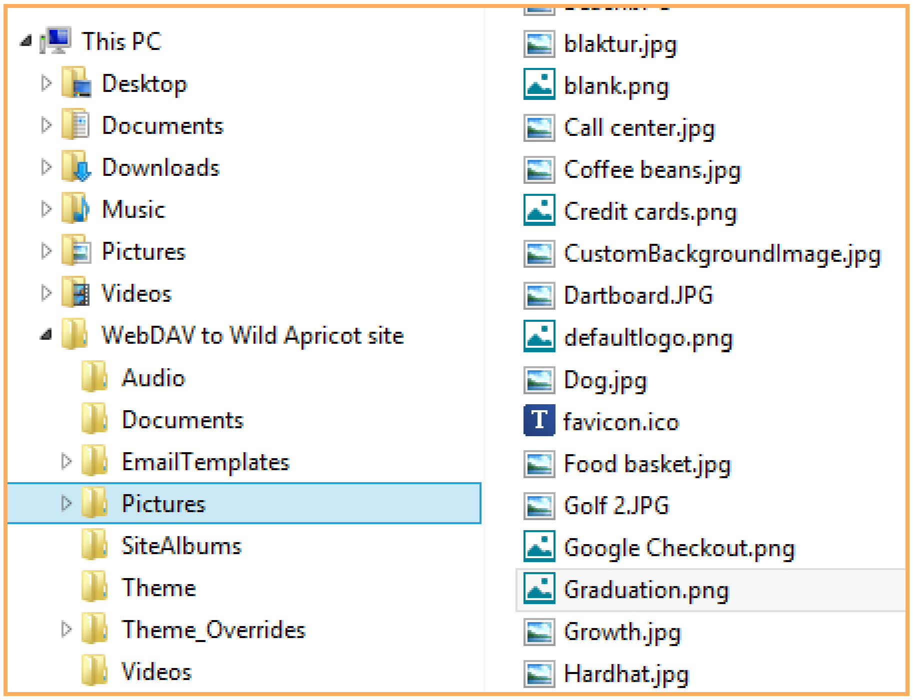


9. Click the **OK** button.
10. When prompted, enter a name for your WebDAV connection (e.g. WebDAV to Wild Apricot site).



11. Click **Finish**.

Now you should see a WebDAV drive that you can expand to view folders and files in your Wild Apricot account.



You can access this drive in the future under the This PC or Computer listing in Windows Explorer. For more information, see Managing files using WebDAV.

Setting Up WebDAV in Windows 7

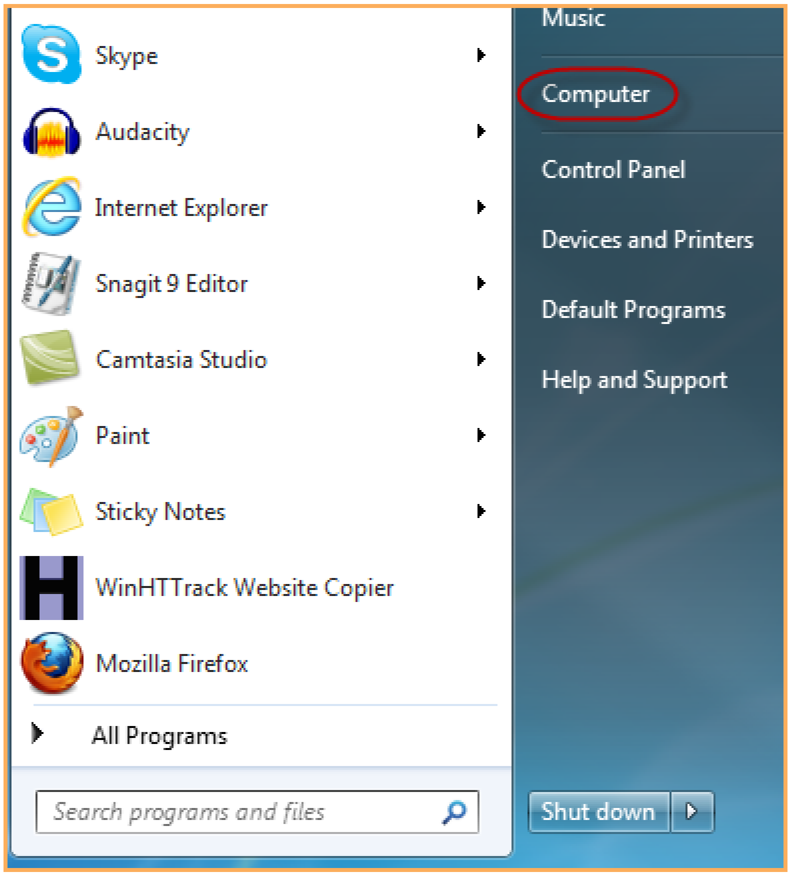
Setting Up WebDAV in Windows 7

You can use WebDAV to manage the files in your Wild Apricot account. You can map a network drive to your Wild Apricot account, then connect to the account.

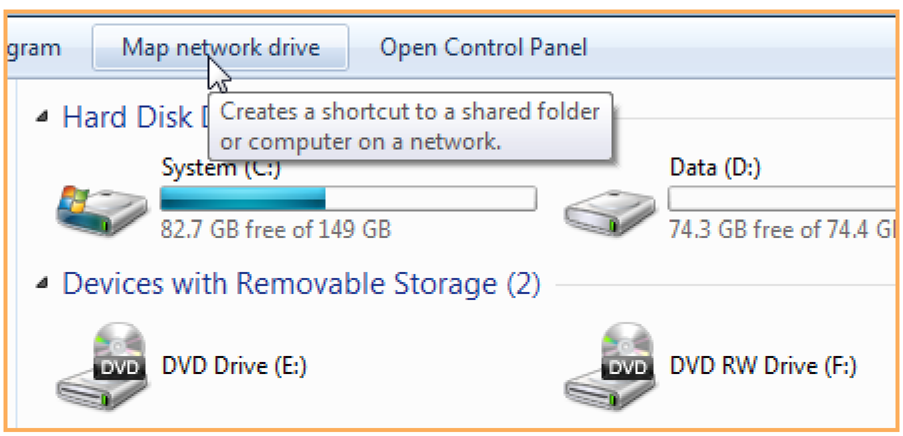
Connecting to your Wild Apricot account via WebDAV

To connect to your Wild Apricot account via WebDAV on Windows 7, follow these steps:

1. From the Windows Start menu, click **Computer**.



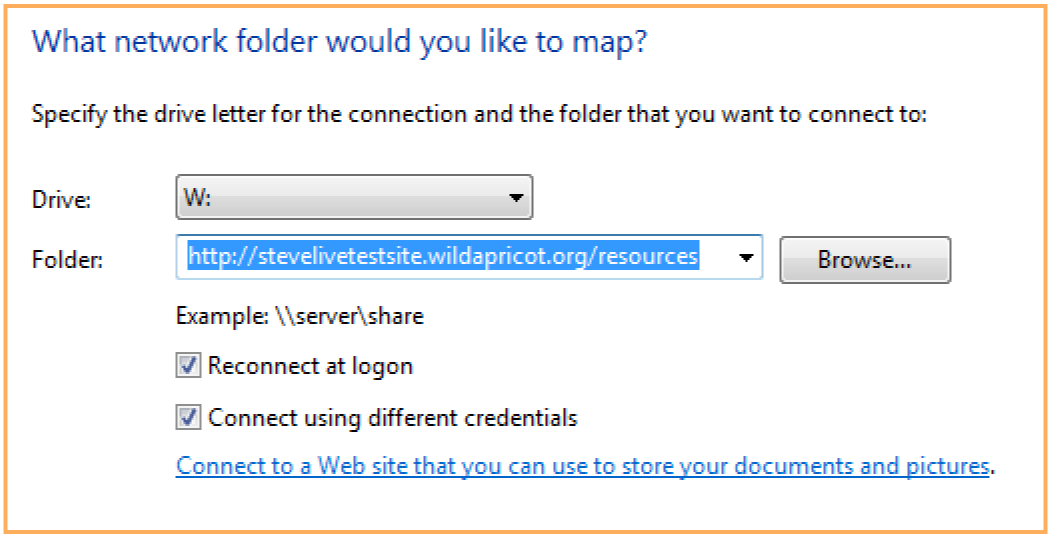
2. Within the Computer window that appears, click **Map network drive**.



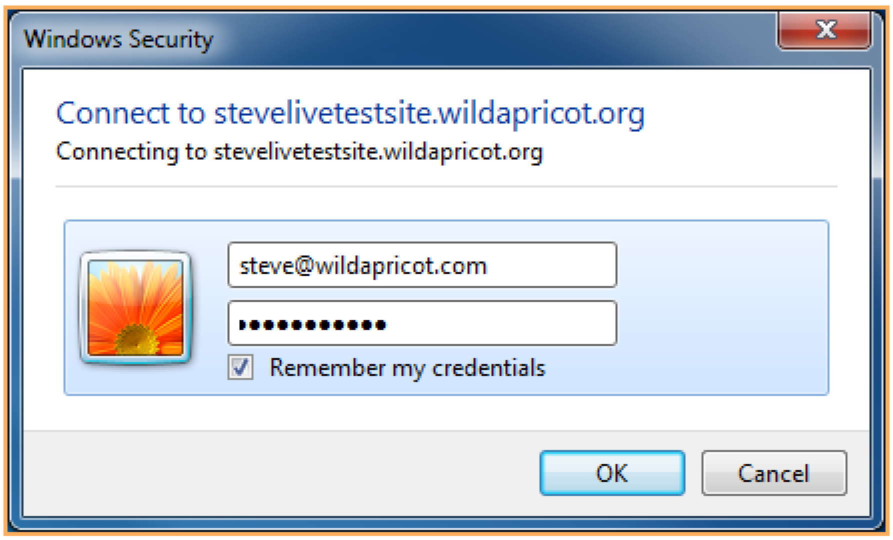
3. Within the Map Network Drive dialog, enter your WebDAV address: *http://your_site_url/resources* (where *your_site_url* is the URL of your Wild Apricot site e.g. *stevelivetestsite.wildapricot.org*).

> For secure access, replace *http* with *https* (only available for wildapricot.org domains). For more information, see Traffic encryption.

4. Click the two check boxes at the bottom.

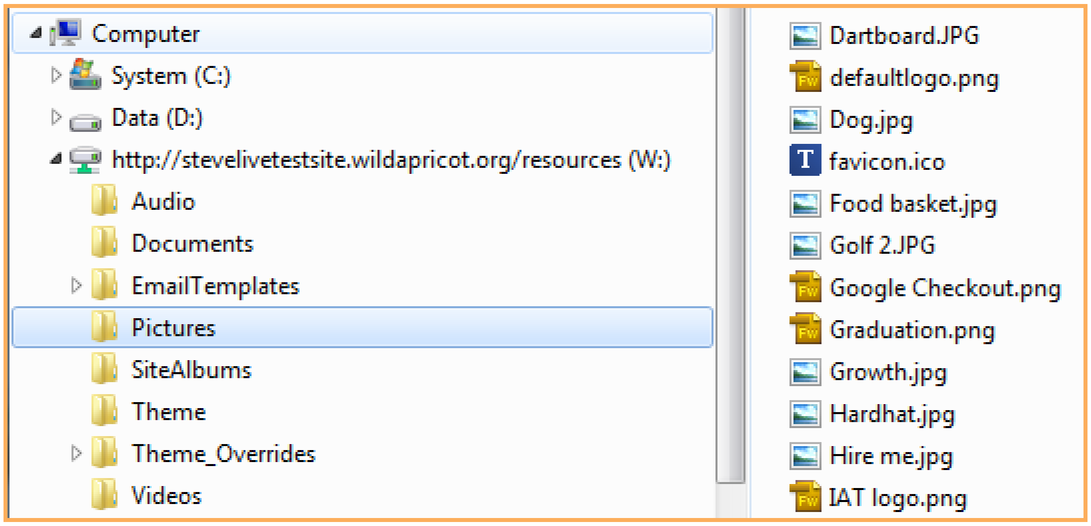


5. Click **Finish**.
6. Enter your Wild Apricot user name and password.
7. Click the **Remember my credentials** checkbox.



8. Click the **K** button.

Now you should see a WebDAV drive that you can expand to view folders and files on your Wild Apricot account.



You can access this drive in the future under the Computer listing in Windows Explorer. For more information, see Uploading files in bulk using WebDAV.

Troubleshooting

- If your credentials are not accepted when you try to connect to your Wild Apricot account via WebDAV, you may have to set up the network drive again.

Setting Up WebDAV in Windows Vista

Setting Up WebDAV in Windows Vista

You can use WebDAV to manage the files in your Wild Apricot account.

To use WebDAV on a computer running Windows Windows Vista, you must install Microsoft's *Software Update for Web Folders*. You can download this from the Microsoft Download Center at: http://www.microsoft.com/downloads/details.aspx?FamilyId=17C36612-632E-4C04-9382-987622ED1D64.

After you've downloaded and installed Microsoft's *Software Update for Web Folders*, you can map a network drive to your Wild Apricot account, then connect to the account.

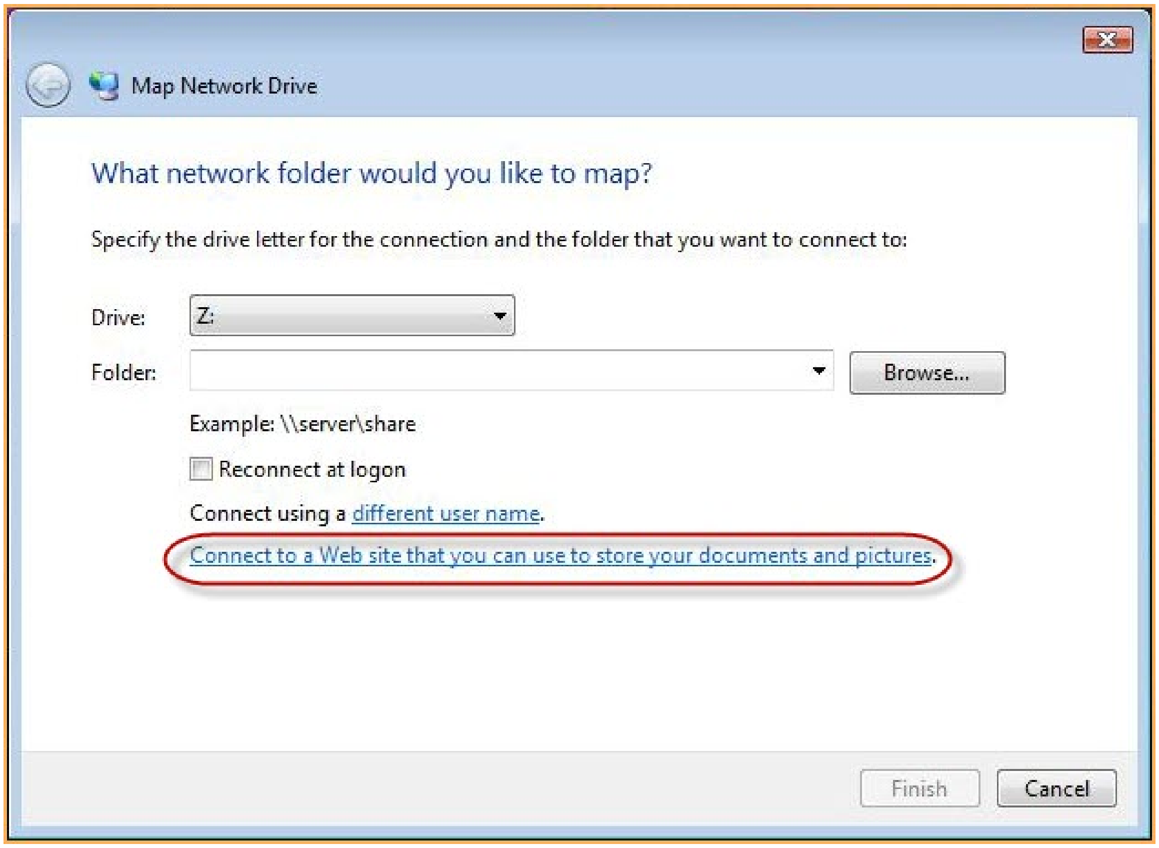
Connecting to your Wild Apricot account via WebDAV

To connect to your Wild Apricot account via WebDAV on Windows 7, follow these steps:

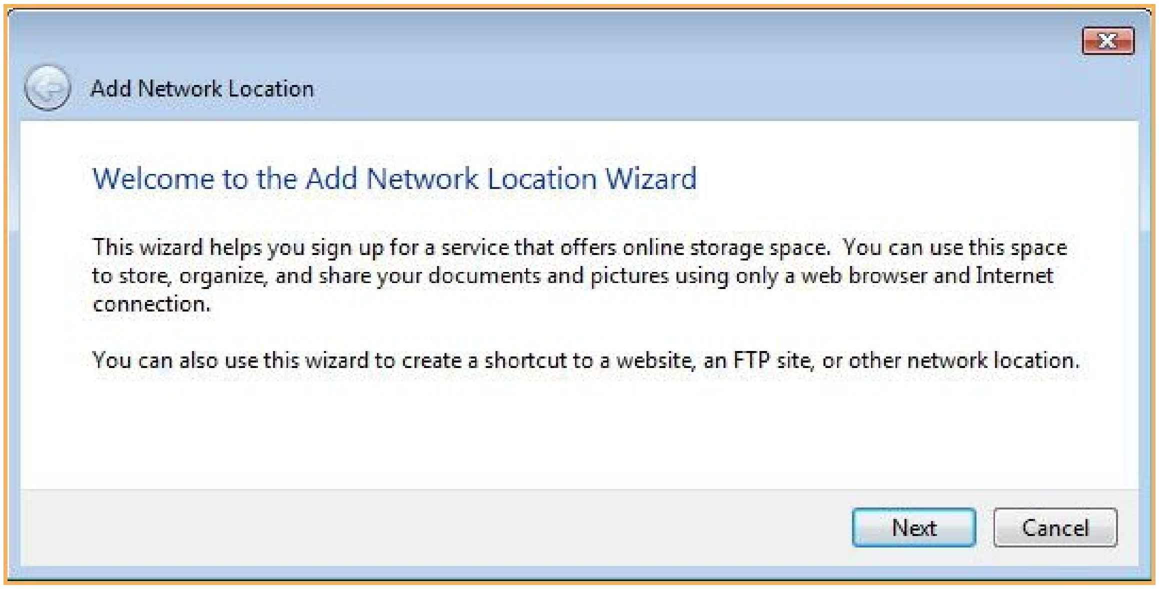
1. From the Windows Start menu, click **Computer**.

2. Within the Computer window that appears, click **Map network drive**.

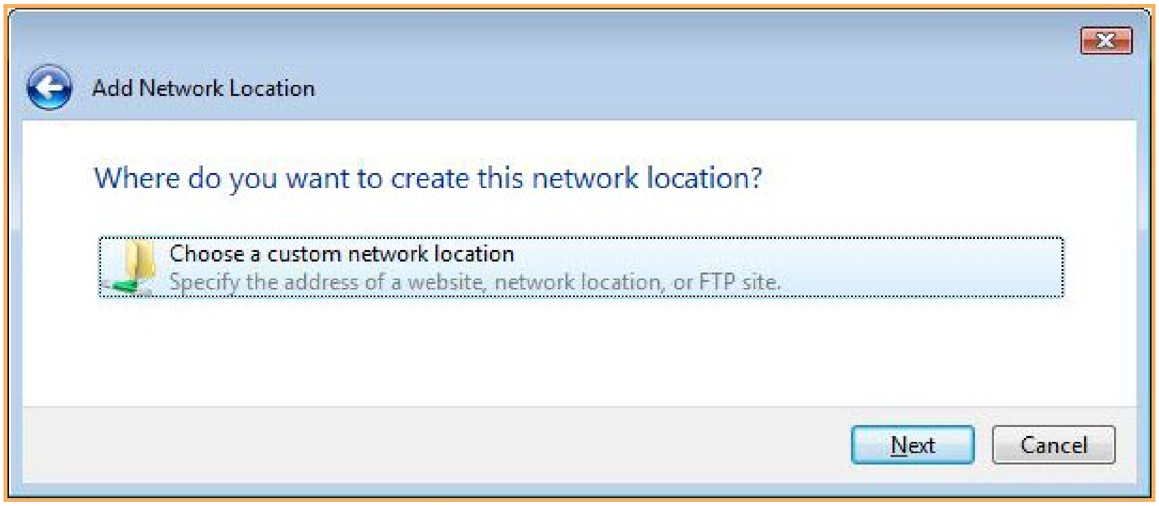
3. On the Map Network Drive dialog, click the **Connect to a Web site that you can use to store your documents and pictures** link.



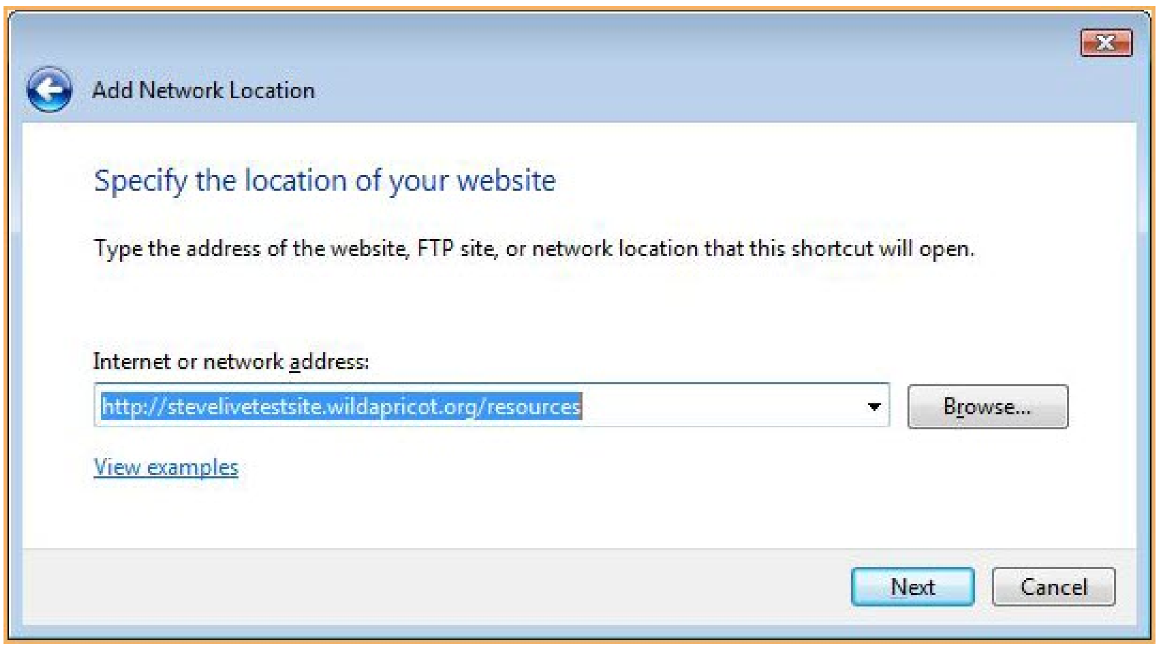
4. On the dialog that appears, click **Next**.



5. On the dialog that appears, select **Choose a custom network location** then click **Next**.

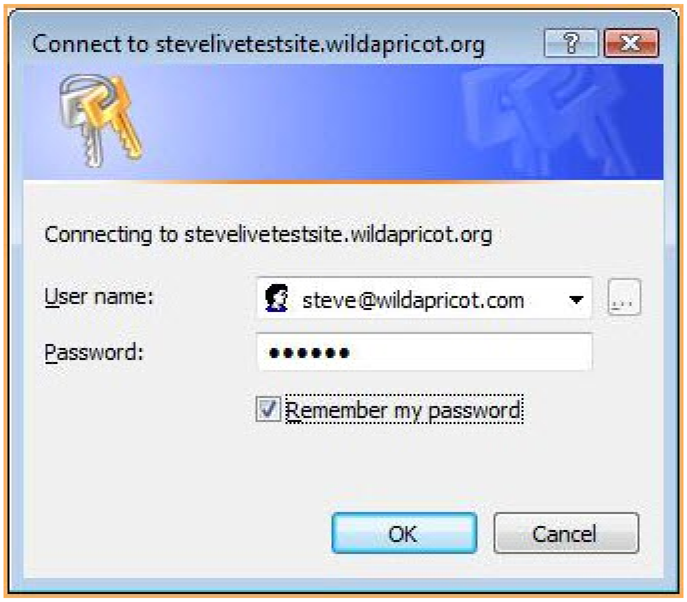


6. In the **Internet or network address** field, enter your WebDAV address: *http://your_site_url/resources* (where *your_site_url* is the URL of your Wild Apricot site e.g. *stevelivetestsite.wildapricot.org*), then click **Next**.

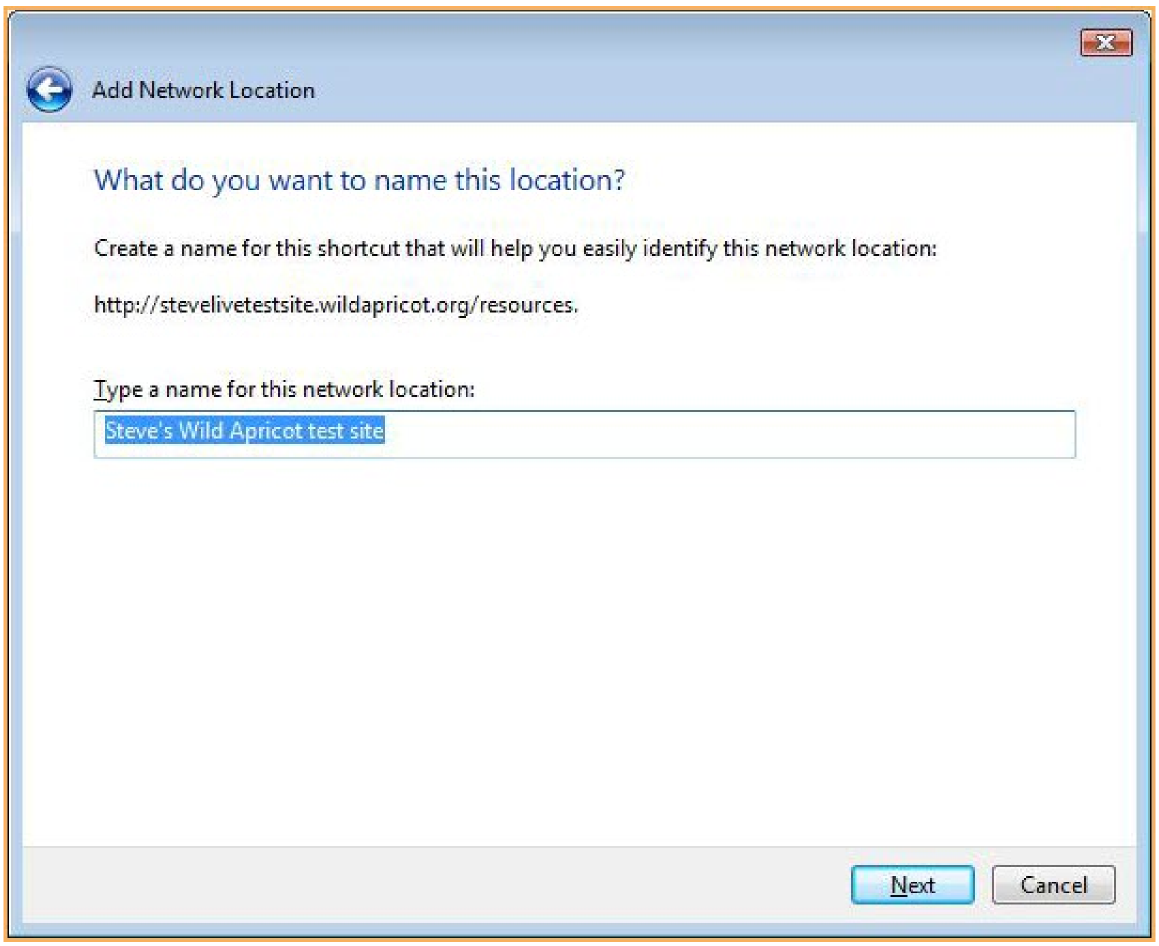


For secure access, replace *http* with *https* (only available for wildapricot.org domains). For more information, see Traffic encryption.

7. Enter your Wild Apricot user name and password.
8. Click the **Remember me** checkbox.

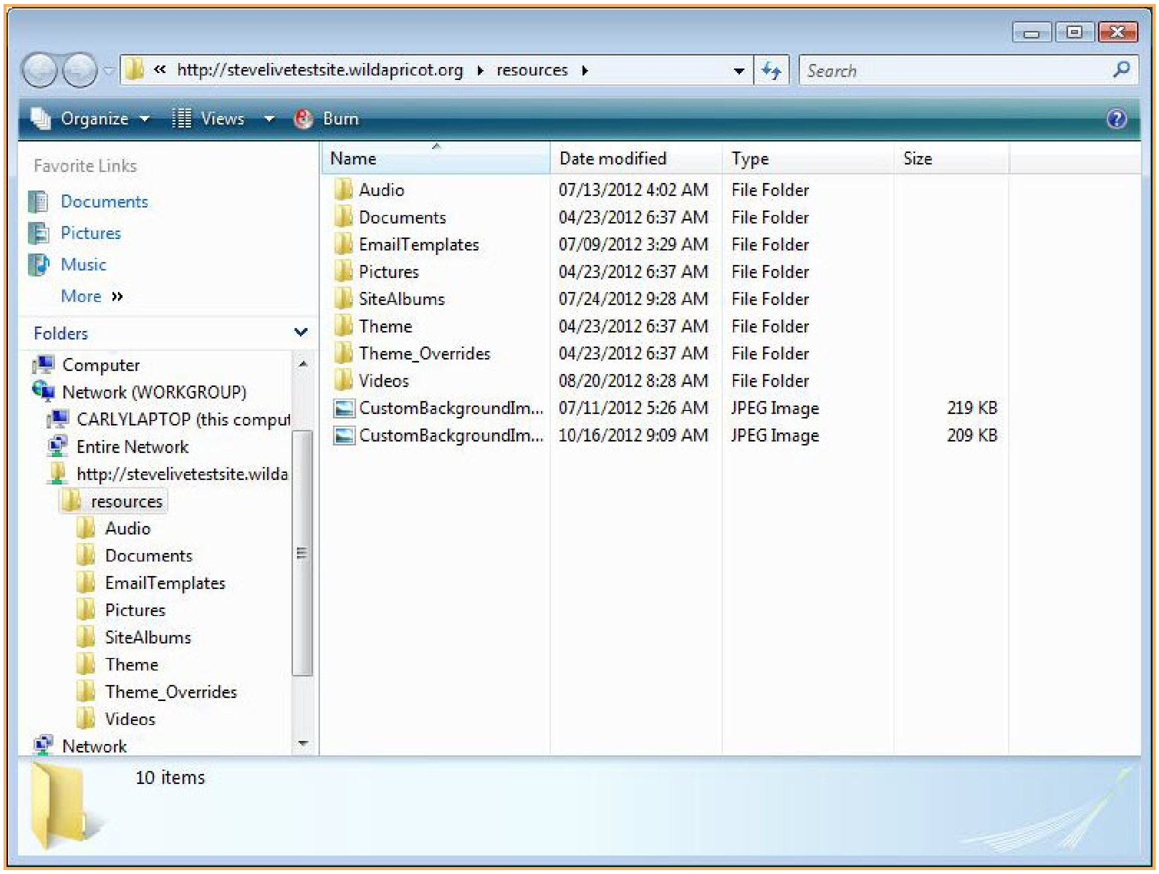


9. Click the **OK** button.
10. Give your new network location a name then click **Next**.



11. Click **Finish**.

Now, you should see a window displaying the files and folders in your Wild Apricot account.



You can access these files in the future under the Network Locations listing in Windows Explorer. For more information, see Managing files using WebDAV.

Setting Up WebDAV in Windows XP

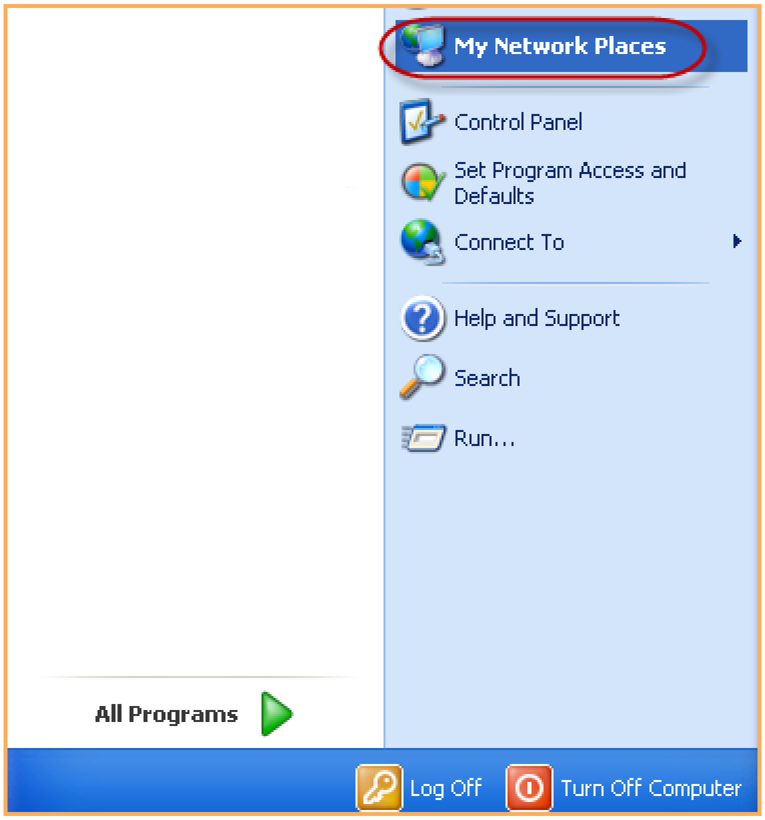
Setting Up WebDAV in Windows XP

You can use WebDAV to manage the files in your Wild Apricot account.

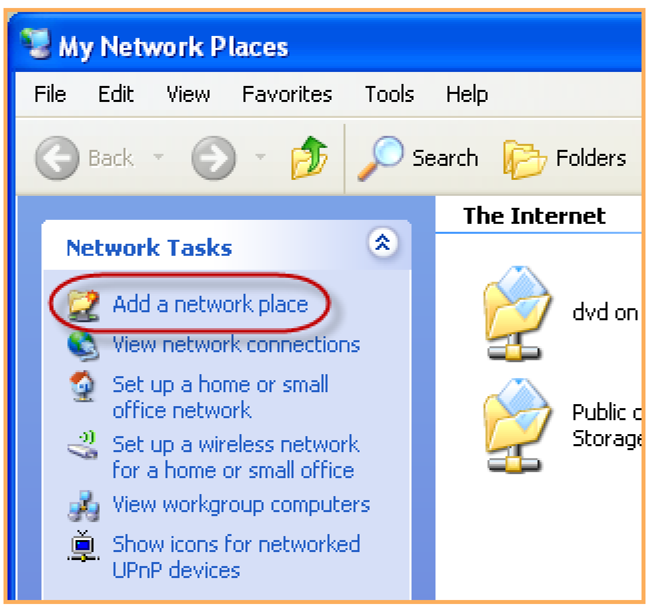
Connecting to your Wild Apricot account via WebDAV

To connect to your Wild Apricot account via WebDAV on Windows XP, follow these steps:

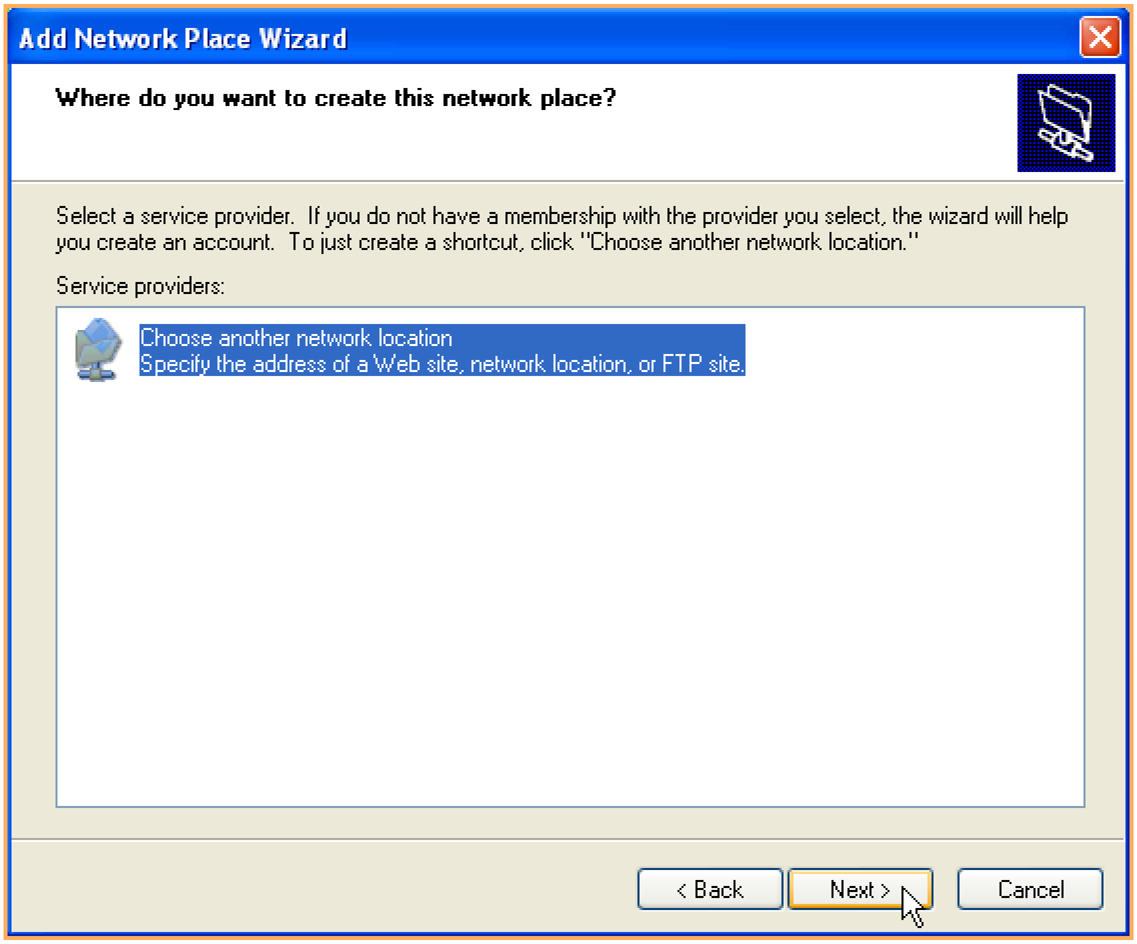
1. From the Windows Start menu, click **My Network Places**.



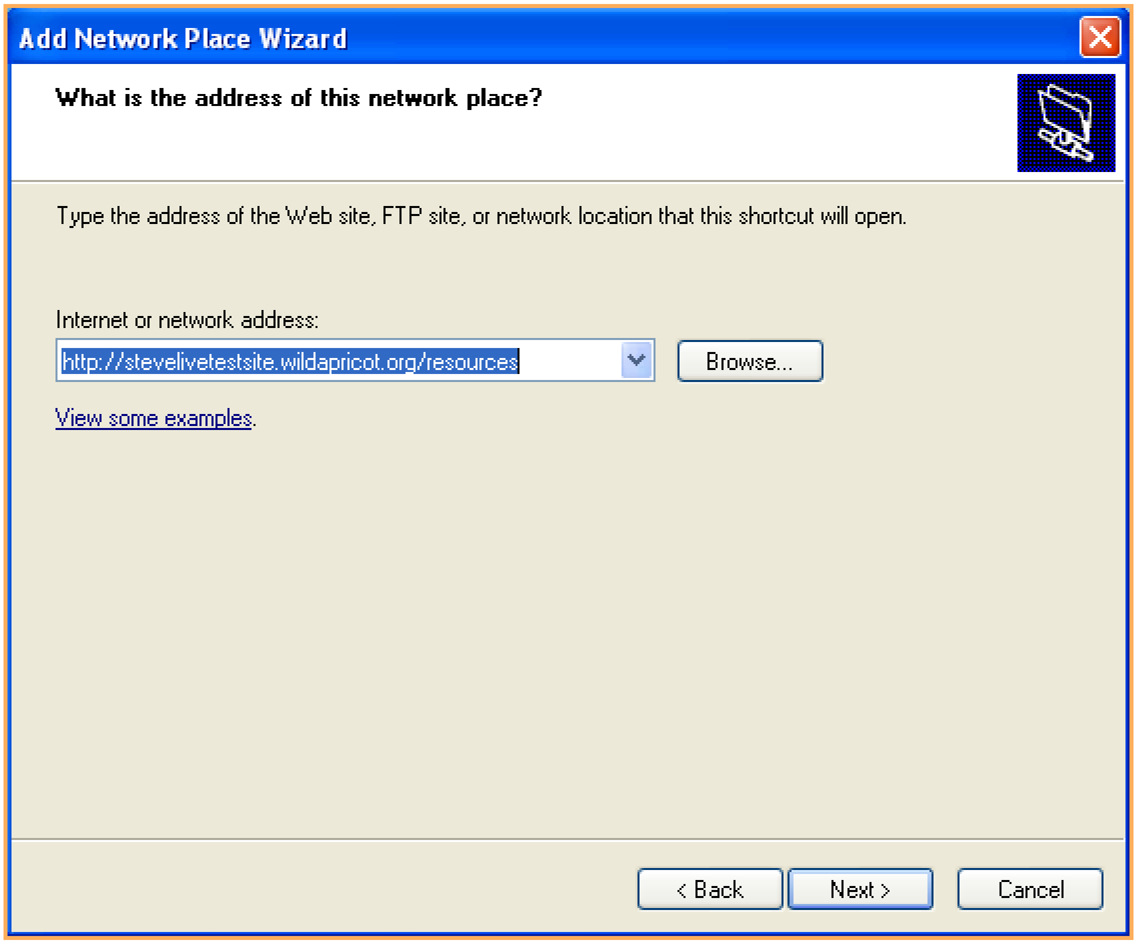
2. From the My Network Places dialog, click **Add network place**.



3. On the next screen, select **Choose another network location** option then click **Next**.

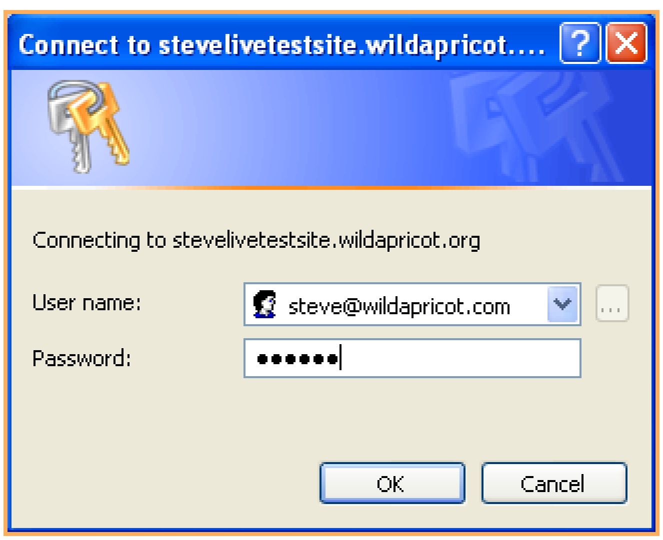


4. In the **Internet or network address** field, enter your WebDAV address: *http://your_site_url/resources* (where *your_site_url* is the URL of your Wild Apricot site e.g. *stevelivetestsite.wildapricot.org*), then click **Next**.

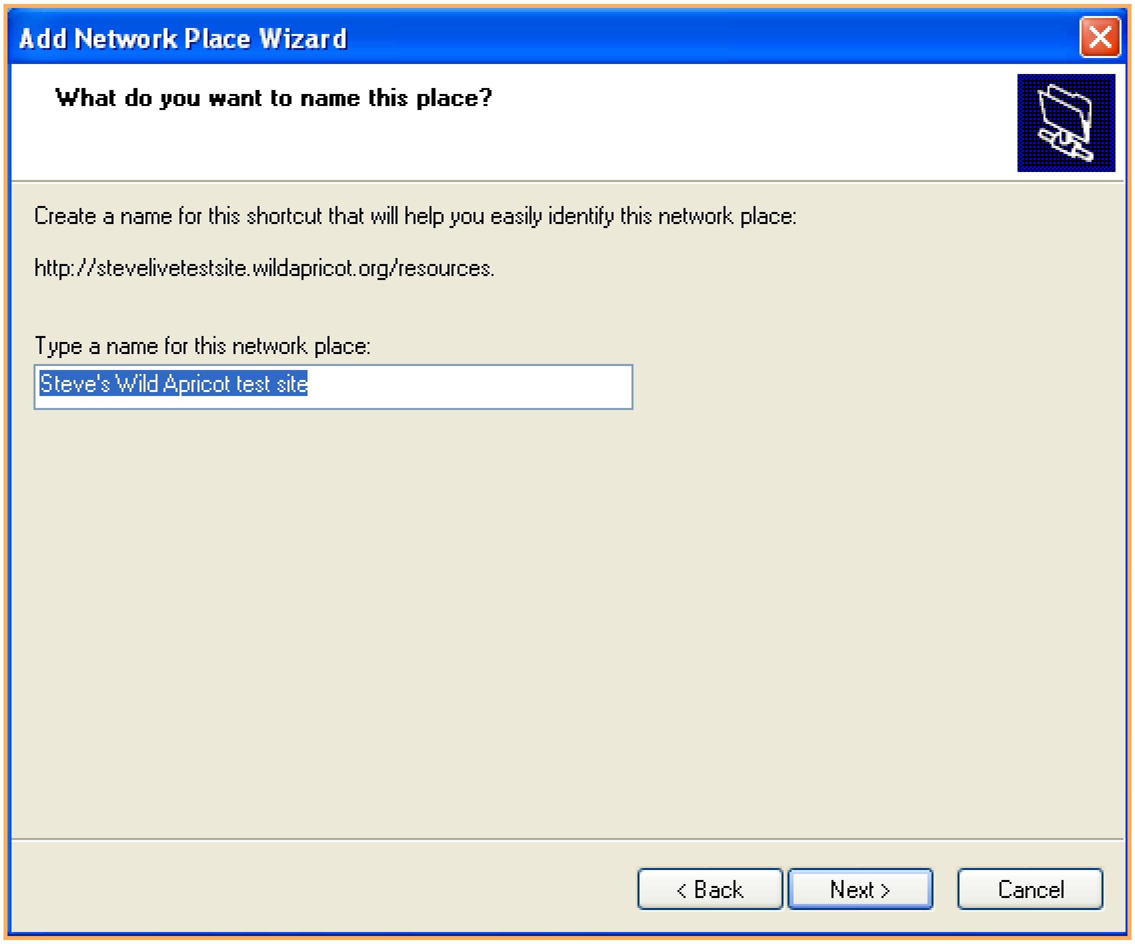


For secure access, replace *http* with *https* (only available for wildapricot.org domains). For more information, see Traffic encryption.

5. Enter your Wild Apricot user name and password then click **OK**.

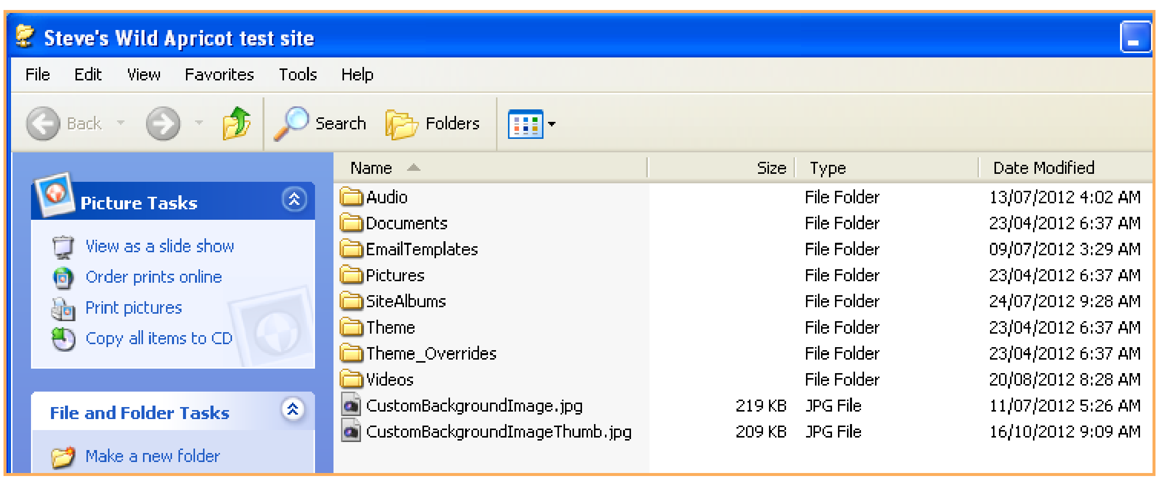


6. Give your new network place a name then click **Next**.



7. Click **Finish**.

   Now, you should see a window displaying the folders and files in your Wild Apricot account.



You can access these files in the future under the My Network Places listing in Windows Explorer. For more information, see Managing files using WebDAV.

Troubleshooting

- If your credentials are not accepted when you try to connect to your Wild Apricot account via WebDAV, you may have to set up the network place again.
- If you have multiple people using WebDAV to connect to your Wild Apricot account from different computers, you may have to refresh the file listing – by pressing F5 on your keyboard – to view files or folders added by other users.

Setting Up WebDAV in Mac OS X

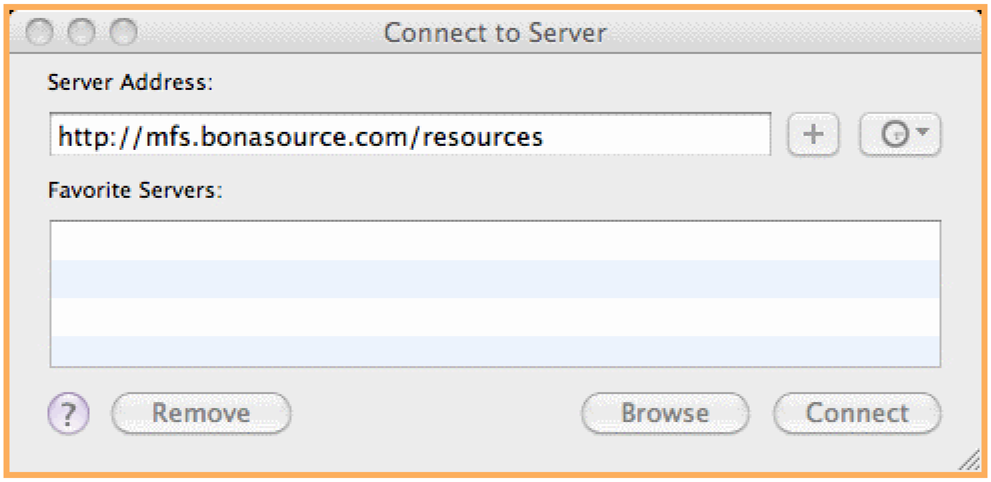
Setting Up WebDAV in Mac OS X

You can use WebDAV to manage the files in your Wild Apricot account.

Connecting to your Wild Apricot account via WebDAV

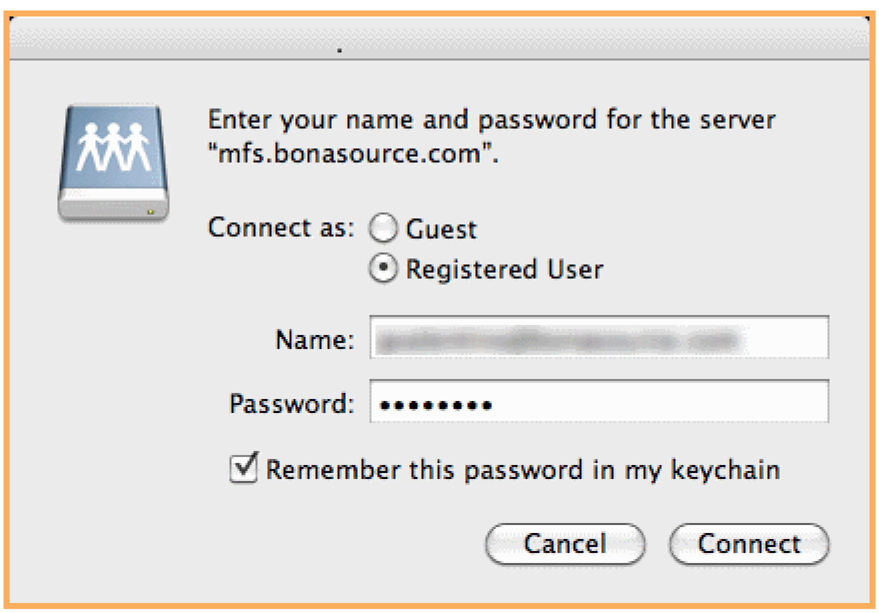
To connect to your Wild Apricot account via WebDAV on Mac OS X, follow these steps:

1. In the Finder, click **Go > Connect to Server**, or press Cmd + K on the keyboard.
2. In the **Server Address** field, enter your WebDAV address: *http://your_site_url/resources* (where *your_site_url* is the URL of your Wild Apricot site e.g. *stevelivetestsite.wildapricot.org*).



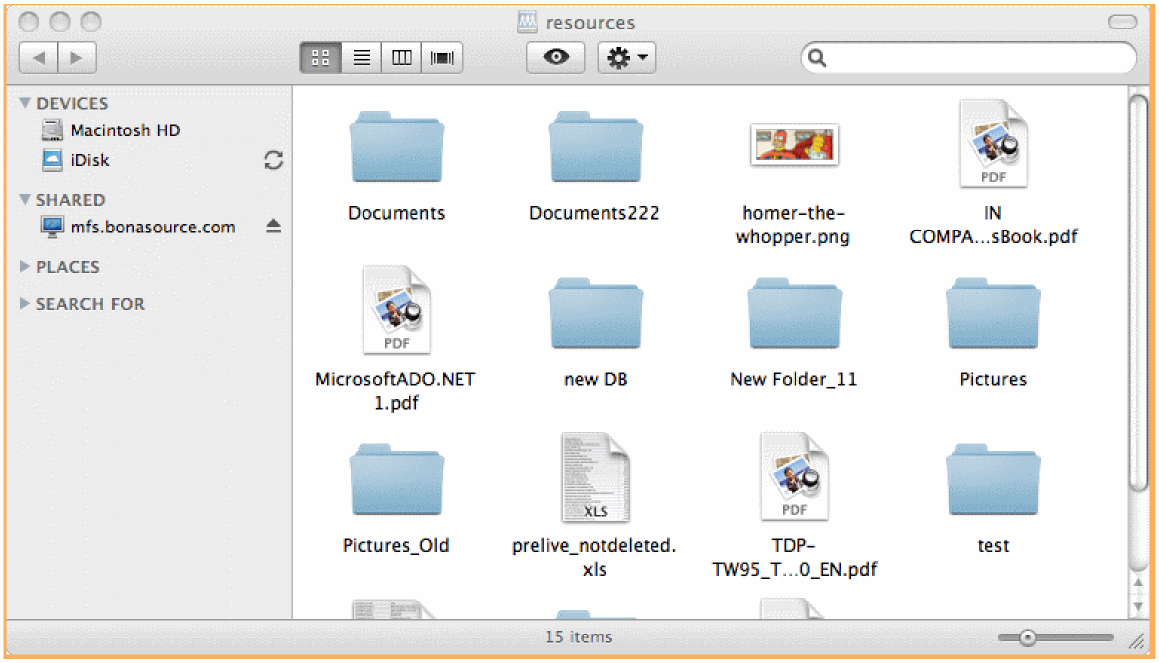
> For secure access, replace *http* with *https* (only available for wildapricot.org domains). For more information, see Traffic encryption.

3. Click **Connect**.
4. If prompted, click **Continue**.
5. In the Verify Certificate dialog, select **Registered user** and enter your Wild Apricot username and password.



6. Select **Remember this password in my Keychain** if you want to store your user name and password on your computer.
7. Click **Connect**.

You can now access your WebDAV folder in your Finder window side panel under **Shared**.



For more information, see Uploading files in bulk using WebDAV.

Traffic encryption

Traffic encryption (HTTPS)

You can provide secure access to your website using *traffic encryption* . Traffic encryption is available for all Wild Apricot domains (sites that use *wildapricot.org*). You can make secure access optional, or you can choose to automatically redirect visitors to a secure URL. You can redirect visitors always, or just when filling out Wild Apricot forms. **Online payments on Wild Apricot will always be encrypted.**

What is traffic encryption?

Traffic encryption, known officially as *hypertext transfer protocol secure* (HTTPS), is a method of securing the transmission of information to and from a website.

Read more/less

It ensures the security of website traffic by encrypting the information being transmitted, and by using security certificates to identify and authenticate the website. This is the same technology used by banks worldwide to secure their online banking sites.

To communicate with a website through a secure, encrypted channel, you use a URL (website address) that begins with *https* rather than *http*. Once a secure channel has been established, your browser may display a padlock icon in the address bar or the status bar.

Do I need to use traffic encryption?

If you access the internet over a unsecured Wi-Fi connection, you run the risk of someone intercepting the data you are sending and receiving.

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This becomes a real security threat if you are an administrator managing a Wild Apricot website. Visitors who submit private information to your website via online forms (e.g. membership applications, event registrations) may also feel more comfortable knowing the traffic is secured.

If you're an administrator…	You wouldn't want someone to steal your credentials and access your membership list.

If you're filling out a form…	You might want to encrypt the data to be on the safe side, even though the chances of someone intercepting your personal information are low.
If you're just visiting the site…	Security is probably not an issue for you (unless you are trying to avoid tracking of what you view online).
If you're making a payment on a Wild Apricot site…	Your credit card data and private information is always protected.

Using traffic encryption can also improve the Google ranking of your site. For more information, click here.

How do I get secure access to my site?

For Wild Apricot domains (sites that use *wildapricot.org*), you simply add an *s* after the *http* in your website address (e.g. *https://nycs.wildapricot.org/* instead of *http://nycs.wildapricot.org/*). To enforce secure access throughout your site, you need to set your traffic encryption options (see below).

Read more/less

Do not include *www* in the URL (e.g. *https://nycs.wildapricot.org/* **not** *https://www.nycs.wildapricot.org/*).

What if I use a custom domain?

If your site uses a custom domain name (such as *www.nycs.net* instead of *nycs.wildapricot.org*), you need to purchase a security certificate to fully secure your site. Without a security certificate installed on your Wild Apricot, you should **not** set your traffic encryption to **Always**.

> Before you buy a certificate, you need to follow certain steps so we can provide you the certificate signing request (CSR) that you need to give your domain provider or certificate authority. After you receive your certificate, Wild Apricot staff will install it on your site for a small fee. For details and pricing, see Securing custom domains (below).

If you don't want to purchase a security certificate, you can switch your primary domain name to the *wildapricot.org* domain, which is already secured by a security certificate. For instructions on switching domain names, see Domain name management.

What if I use another Wild Apricot domain?

If your site is using another Wild Apricot domain – such as camp7.org, camp8.org, camp9.org, cloverpad.org, memberlodge.com, memberlodge.org, onefireplace.com, onefireplace.com, roundtablelive.org, or shuttlepod.org – you cannot fully secure your site without switching your primary domain to the wildapricot.org version of your site. Setting your traffic encryption to *Always* will produce errors and security warnings with these domains.

You should consider setting the wildapricot.org version of your site as the primary domain from the Domain name management screen. You could then set the traffic encryption on your site to *Always* . You would then need to inform your members about the new URL for your site. For instructions on switching domain names, see Domain name management.

Traffic encryption options

If you want to enforce secure access, you can automatically redirect visitors to your site to a secure URL. You can redirect visitors always, or just when filling out Wild Apricot forms.

Read more/less

> Whatever settings you choose, visitors can always use the secure URL to access your site (by adding an *s* after the *http* in the website address).

To control when visitors to your site are redirected to a secure URL, follow these steps:

1. Click **Settings**.
2. Under **Security**, click **Traffic encryption (HTTPS/SSL)**.
3. Choose when you want to redirect visitors to the secure URL.

Option	Level of security	Description
Always	High	All *http* page requests will be redirected to the encrypted *https* page. There are some limitations that you should be aware of (see below). Do **not** select this option if you are using, as your primary domain, a custom domain that does not have its own security certificate installed on your Wild Apricot site, or if you have memberlodge.org, memberlodge.com, or camp.org set as your primary domain.
Forms only	Medium	Only pages containing Wild Apricot forms (such as membership applications and event registrations but **not** login form gadgets) will be redirected to the secure URL. Once redirected to a secure URL, the visitor will not be redirected back to an insecure page within the current session. Members will be directed to a secure URL once they log in. You should choose this option if your site links to external resources (e.g. graphics or stylesheets) that are stored on a website that is not secured (uses *http* instead of *https*). See below for limitations.
Payments only	Low	Online payments will be processed on secure pages, but while on your site, visitors will never be redirected to your site's secure URL. Visitors can, however, use the secure URL at any time to access the site. Once a member logs in from a secure page, the member will stay on secure pages for the remainder of the current session.

4. Click **Save**.

Regardless of what settings you choose, payments on Wild Apricot sites are always encrypted and handled via a separate secure URL (https://payments.wildapricot.com).

Securing custom domains

To secure a custom domain (such as *www.nycs.net* instead of *nycs.wildapricot.org*), you need to purchase a custom security certificate that Wild Apricot staff can install on your site. After that, you can set your traffic encryption to **Always**.

> ⚠ If you use a custom domain without purchasing a security certificate, visitors who access your site by manually entering *https* will typically see a security warning displayed by their browser stating that your custom domain name doesn't match the security certificate (which is issued by Wild Apricot). They can ignore it and use the site but may be scared away by the warning.

Obtaining a free security certificate using Let's Encrypt

Let's Encrypt offers free security certificates for custom domains. Since installing security certificates from Let's Encrypt is simpler than installing certificates from other vendors, Wild Apricot does not charge an installation fee or a renewal fee for security certificates from Let's Encrypt.

To get a security certificate from Let's Encrypt installed on your Wild Apricot site, have a full account administrator send an email requesting a security certificate from Let's Encrypt to Wild Apricot support, and include your custom URL and Wild Apricot account number in the message. We'll let you know once it's installed.

Obtaining a security certificate from any other vendor

The cost of a one-year security certificate from a vendor other than Let's Encrypt begins around $100. To install the security certificate from a vendor other than Let's Encrypt on your custom domain, we charge an initial fee of $50 and a renewal fee of $50.

The steps involved in purchasing and installing a custom security certificate from a vendor other than Let's Encrypt are as follows:

Read more/less

1. Choose a security certificate vendor. (For instructions on purchasing a security certificate from DigiCert, click here.)

   > ⚠ You should avoid purchasing certificates from WoSign and StartCom. They are no longer considered to be trusted authorities. For details, click here.

2. Have a full account administrator send an email to Wild Apricot support and provide the following information:
   - Country/region Name (2 letter code) – you can find your two-digit country code at: www.digicert.com/ssl-certificate-country-codes.htm
   - State/province (full name)
   - City
   - Organization name – The legally registered name of your organization/company (maximum 64 symbols, including spaces).
   - Organizational unit name – The name of your department within the organization (frequently this entry will be listed as "IT," "Web Security," or is simply left blank).
   - Common name – The name/domain through which the certificate will be accessed (usually the fully-qualified custom domain name e.g. www.domain.com. Note some vendors might not generate the SSL certificate for both www.domain.com and domain.com, so be sure to specify the main domain you would like to use).
   - Email Address
3. Our support representative will generate and email you a CSR (Certificate Signing Request). You can use the CSR to order an SSL certificate from your vendor.

   > ⚠ For security reasons, we cannot accept the sharing of the SSL private keys, or install on our servers SSL certificates that were not based on our Certificate Signing Requests (CSRs).

4. Visit your vendor's website and use the CSR to order your certificate. Make sure the SSL certificate you purchase is for Apache or Nginx, and make sure your vendor includes the following statements in the SAN (Subject Alternative Name) section of the certificate so that it applies to your website's URL with and without the *www*:

   ```
   DNS Name=www.yourdomain.com
   DNS Name=yourdomain.com
   ```

5. After receiving the SSL certificate from your vendor, email it to us – usually it is an archive file or CRT/CER files provided by certificate vendor – and separately send the intermediate certificate file.
6. After we receive the certificate from you, we'll install it on your website and let you know when we're done.
7. Finally, we will instruct you to update your custom domain's DNS settings . We'll provide the details but you'll need to contact

your domain name provider, or access your domain registrar account online, to perform this step.

Once the process is complete, we'll invoice you for the installation fee.

Secure site seals

When you purchase a security certificate from a vendor, you are usually entitled to display the branded seal on your site to let visitors know your site is secure.

Read more/less

For information on obtaining the HTML code to display the seal on your site, visit your vendor's website. The following links provide information on obtaining the code from some of the more popular vendors:

- DigiCert
- Instant SSL
- Go Daddy
- Trustwave
- GeoTrust
- Comodo

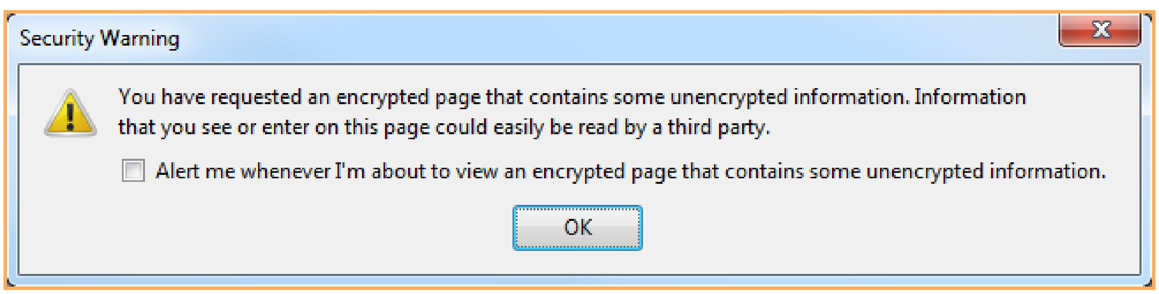
Limitations

Visitors to your website may encounter problems establishing or maintaining a secure connection if the page includes references to resources stored at a site that begins with *http* rather than *https*. These resources could include:

Read more/less

- external graphics
- external stylesheets
- third-party widgets
- JavaScript files
- YouTube videos
- internal resources identified using an absolute reference that begins with *http*

In these cases, the browser may block content, generate an error message,



or display an icon indicating that the page is not completely secure.

The traffic to and from your site will remain encrypted, but the unsecured resources could be viewed by a third party.

On this page:

- Obtaining a security certificate from any other vendor
- Secure site seals
- Limitations

Expand all sections

See also:

- Purchasing a security certificate from DigiCert

Purchasing a security certificate from DigiCert

Purchasing a security certificate from DigiCert

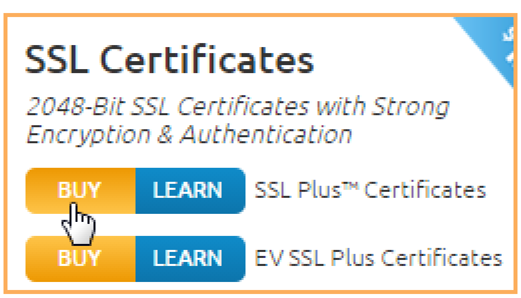
You can purchase a security certificate from any domain registrar you choose. The instructions here apply to DigiCert, one of the more popular domain registrars. For generic instructions on purchasing a security certificate from other vendors, click here.

To secure a custom domain (such as *www.nycs.net* instead of *nycs.wildapricot.org*), you need to purchase a custom security certificate that Wild Apricot support can then install. Without a security certificate, visitors who access your site by manually entering *https* will typically see a security warning displayed by their browser. They can ignore it and use the site but may be scared away by the warning.

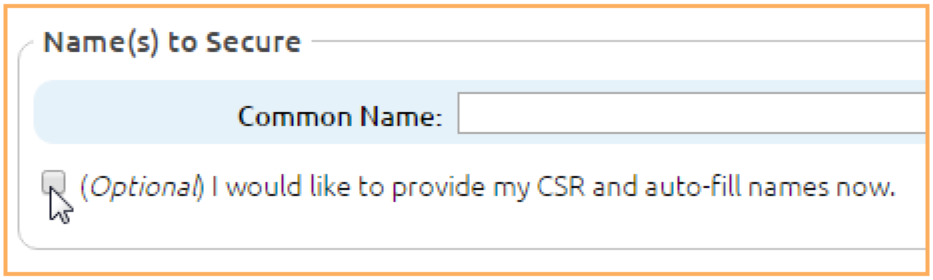
The cost of a one-year security certificate – which you purchase independently – begins around $100. To install the security certificate on your custom domain, we charge an initial fee of $50 and a renewal fee of $50.

To purchase and install a security certificate from DigiCert, follow these steps:

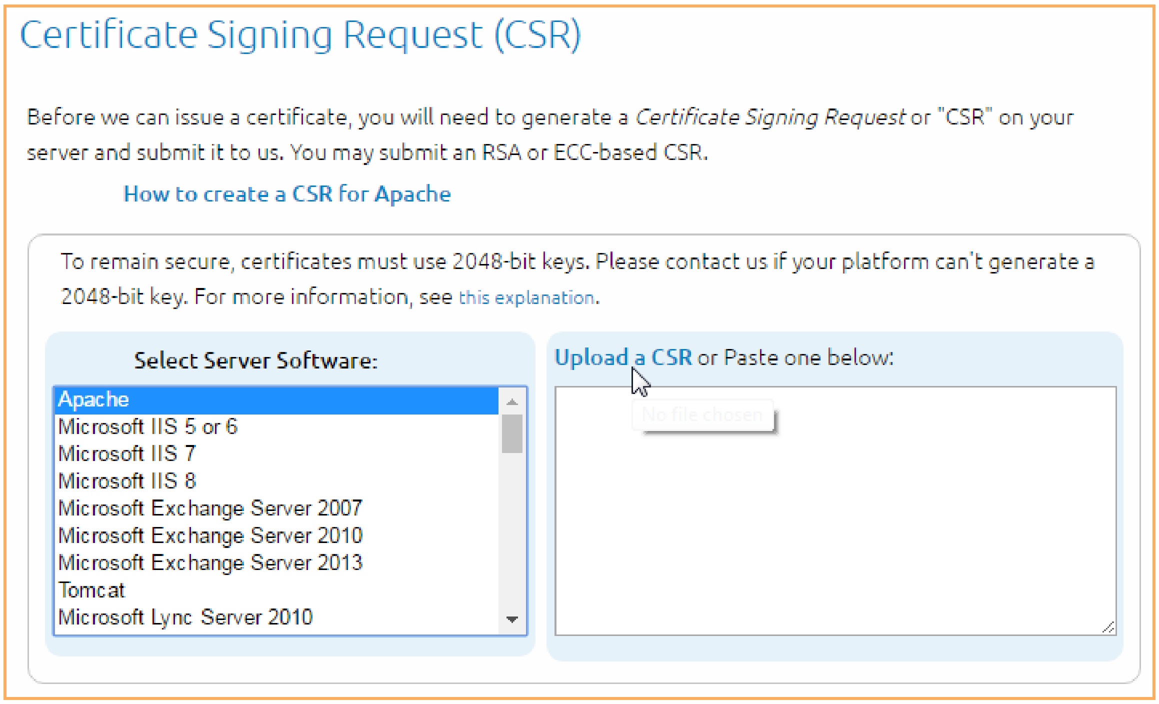
1. Contact Wild Apricot support and provide the following information:
   - Country/region Name (2 letter code) – you can find your two-digit country code at: www.digicert.com/ssl-certificate-country-codes.htm
   - State/province (full name)
   - City
   - Organization name – The legally registered name of your organization/company (maximum 64 symbols, including spaces).
   - Organizational unit name – The name of your department within the organization (frequently this entry will be listed as "IT," "Web Security," or is simply left blank).
   - Common name – The name/domain through which the certificate will be accessed (usually the fully-qualified custom domain name e.g. www.mysite.com.
   - Email Address
2. Our support representative will generate and email you a CSR (Certificate Signing Request) file. Save the CSR file to a location on your computer or network. You will use the CSR to order an SSL certificate from DigiCert.
3. Go to DigiCert.com and click the option to **Buy** an **SSL Plus Certificate**.



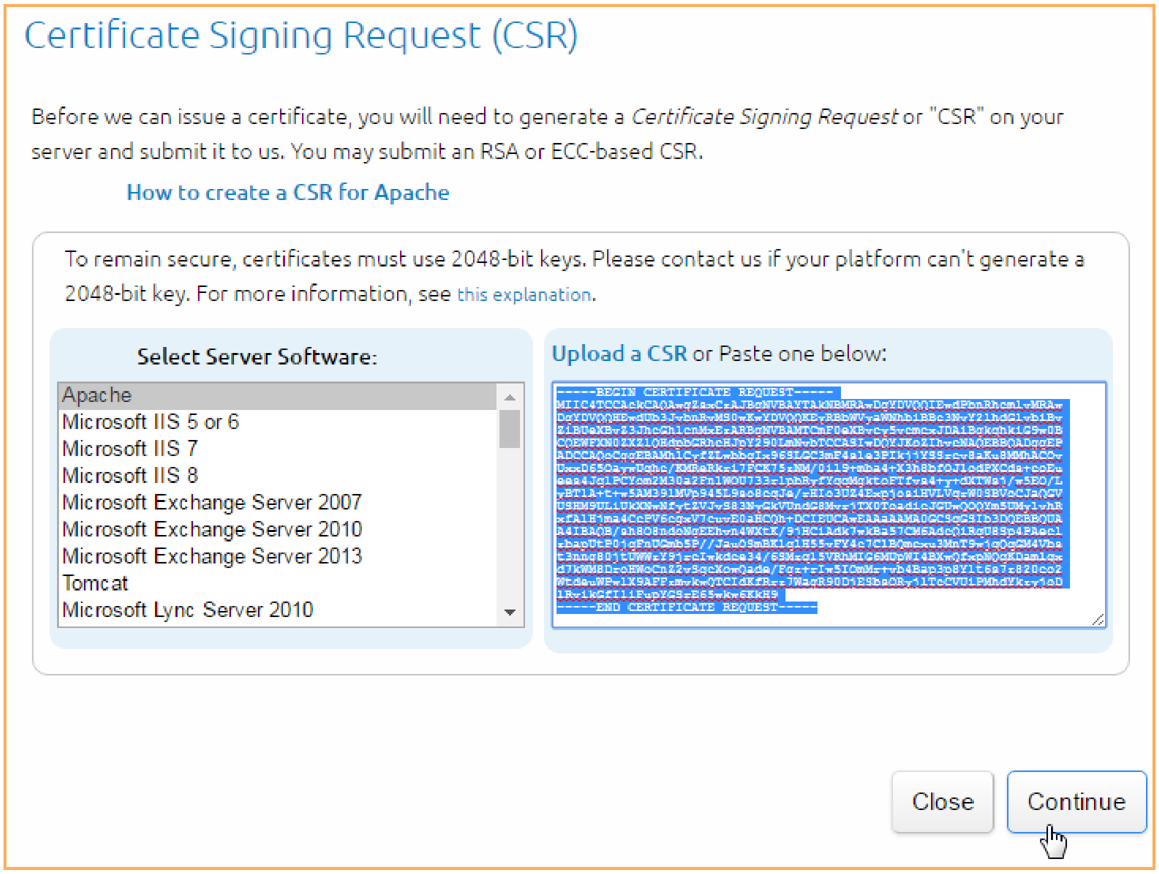
4. On the order form that appears, you can choose to upgrade to Extended Validation SSL Plus, or stay with the regular SSL Plus certificate.
5. Under **Validity Period**, choose how long you want the certificate to apply.
6. Under **Name(s) to Secure**, leave **Common Name** blank and check the box labelled **I would live to provide my CSR and auto-fill names now**.



7. On the dialog that appears, select either *Apache* or *nginx* as the server software.
8. Click **Upload a CSR** and select the CSR file sent to you by Wild Apricot support.



9. The contents of the CSR file will be automatically pasted. Click the **Continue** button.



10. Click **Continue** from the order form and complete your product order. You will receive one or more files from DigiCert containing a security certificate and the intermediate certificate.
11. After receiving the zip file from DigiCert, email it to Wild Apricot support.
12. After we receive the certificate from you, we'll install it on your website and let you know when we're done.
13. Finally, you must update your custom domain DNS settings within your domain registrar account. We'll let you know what you have to change.

Once the process is complete, we'll invoice you for the installation fee.

Captcha anti-spam settings

Captcha anti-spam settings

To prevent automated software – known as spambots – from creating bogus accounts or bombarding your blog or forum with spam posts and comments, you can enable Wild Apricot's anti-spam Captcha feature. You can enable or disable Captcha separately for different types of forms, including membership application forms, event registration forms, forum posts, and blog comments.

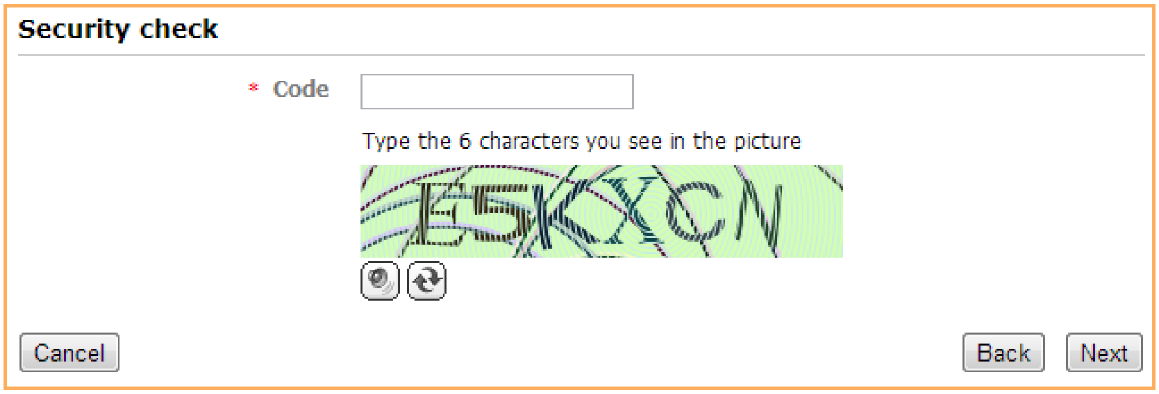
With Captcha enabled, visitors to your site will have to enter a set of characters – proving them to be a person rather than a program – before they can submit the form.

> Some spambots can use OCR technology to bypass Captchas. If you continue to receive a lot of spam, contact us and we'll try to identify and (at least temporarily) block the spammer's IP address.

Using a form with Captcha

If Captcha is enabled for a particular type of form, the form will include a **Security check** section towards the bottom.

Read more/less



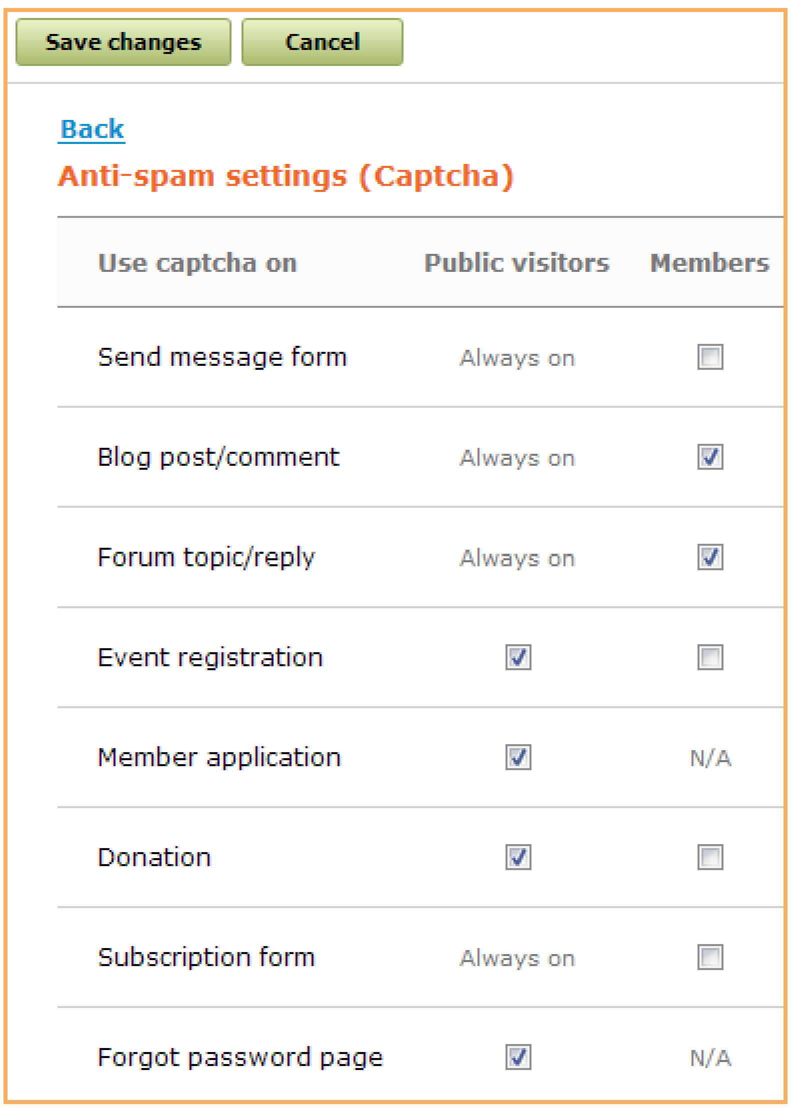
The section will display a group of distorted random letters that the user has to enter before they can submit the form. If the user cannot distinguish the letters, they can click on the speaker icon and have the letters read to them or click on the refresh icon to get a new set of letters. There is no limit to the number of attempts they can make.

Once they have entered the letters properly, they can proceed to the next step.

Enabling Captcha

To enable Captcha for different types of forms, go to **Settings**, and click **Anti-spam settings (Captcha)** under **Security**. On the screen that appears, click the checkbox beside the desired form types then click **Save changes**.

Read more/less



Note that anti-spam settings cannot be turned off for the public on certain pages like blogs, forums, send message forms, and subscription forms.

You can enable Captcha to appear when forms are visible to the public, just members, or both.

Within Captcha settings, logged-in non-member contacts are considered public visitors.

On this page:

- Using a form with Captcha
- Enabling Captcha

Expand all sections

See also:

- Complying with anti-spam regulations

Domain name management

Domain name management

When you create a Wild Apricot account, you are provided with a free website address. It is generated automatically based on the organization name you enter when you create your trial account, but you can change it at any time. If you already have your own custom domain address and if you have a billable Wild Apricot account (not a free one), you can use your custom domain name in place of your free Wild Apricot address.

For example, instead of...

```
http://nycs.wildapricot.org
```

...you could register and use:

```
http://nycs.com
```

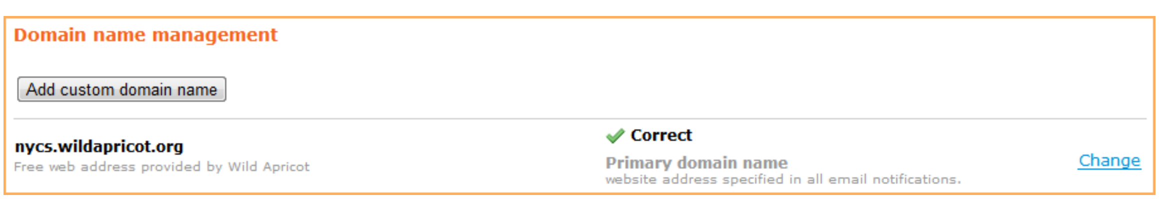
Wild Apricot provides free secure access to *wildapricot.org* domains. Accounts that use other free domains (such as *camp7.org* and *memberlodge.org*) are provided an additional *wildapricot.org* domain that can be accessed using a secure *https* URL. You can use the secure *wildapricot.org* domain in addition to your regular website address, or you can switch your website to the *wildapricot.org* domain.

For custom domains, you can also use the *wildapricot.org* domain for secure access, or we can install your own custom security certificate on your custom domain for a separate charge. For details and pricing, see Securing custom domains.

From the **Domain name management** screen, you can change your free Wild Apricot domain name, and add or remove custom domain names.

To display the **Domain name management** screen, go to **Settings** then click **Domain name** under **Site settings**.

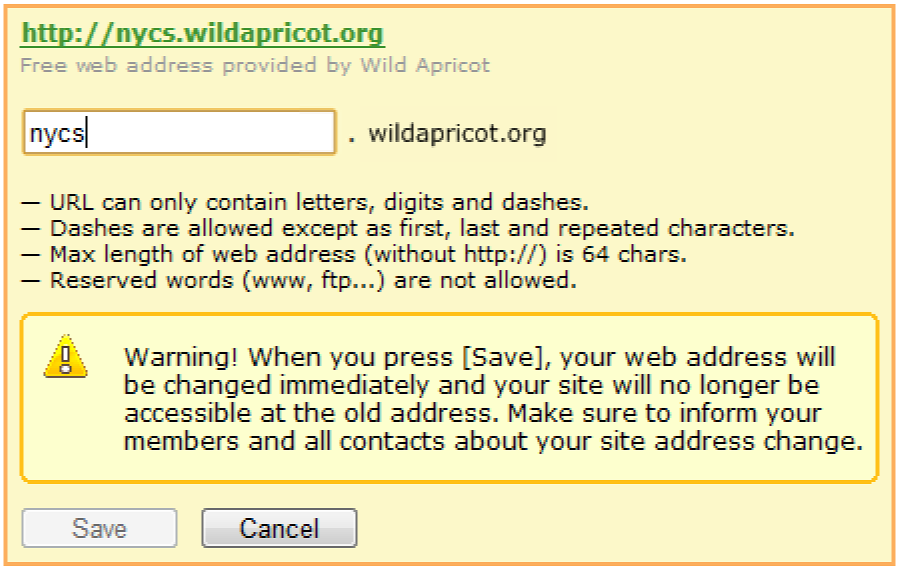
The first time you display the page, it will have only one entry – your initial free domain:



Changing your domain name

To change the first part of your free Wild Apricot domain name (the part in front of *wildapricot.org*), click **Change**.

Read more/less



Enter the new domain name prefix (following the on-screen instructions regarding restrictions) then click **Save**.

The change will take affect immediately, and your site will no longer be accessible at the previous address.

Adding a custom domain name

If you already own a custom domain name, you can use it in place of the free address provided by Wild Apricot.

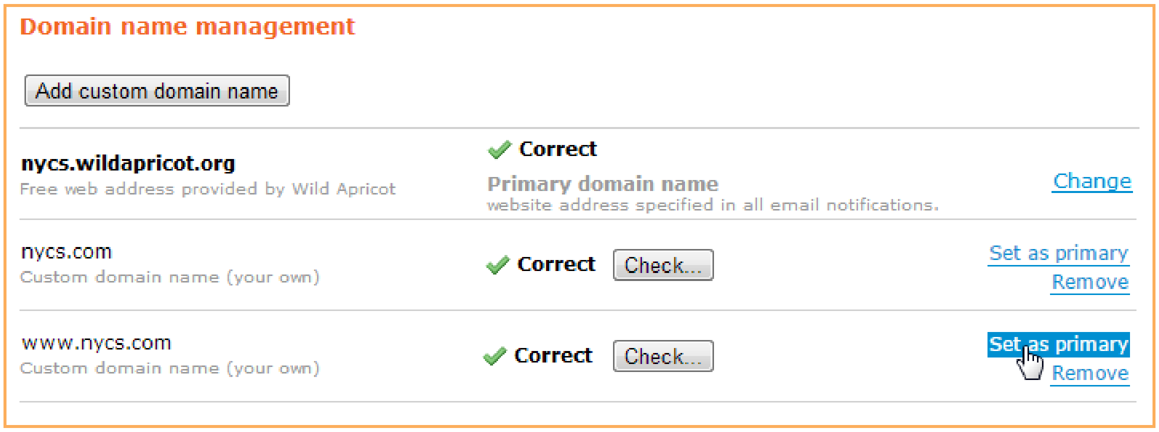
Read more/less

The custom domain must be properly set up according to these instructions.

> You cannot use a custom domain name with a free Wild Apricot account.

To add a custom domain name, click **Add custom domain name** then enter your domain name. If you add a custom domain name without the *www* prefix, we will automatically add domains both with and without the *www* prefix.

One domain has to be designated as the primary one – by clicking **Set as primary** beside the domain name.

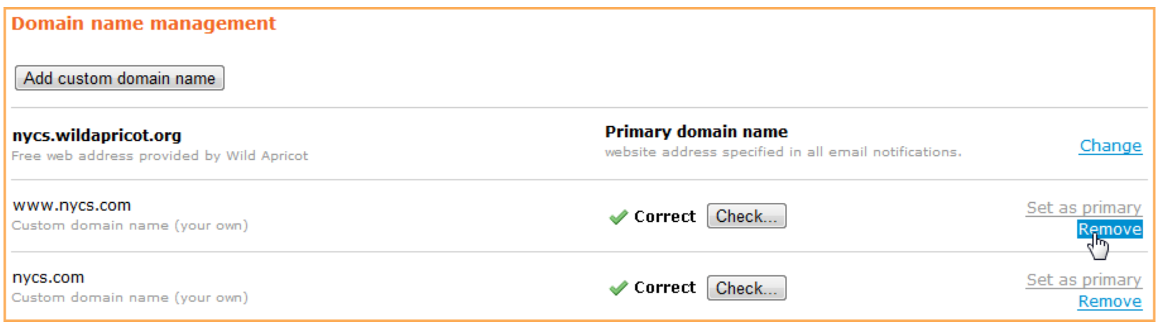


After setting a custom domain as your primary domain, you should review your traffic encryption settings. If you set traffic encryption to **Always**, and do not have a security certificate installed, visitors to your site may encounter security warnings.

Removing a custom domain name

If you add a custom domain name like *nycs.org*, we will automatically add both *www.nycs.org* and *nycs.org*. If you do not want both, you can delete one by clicking **Remove**.

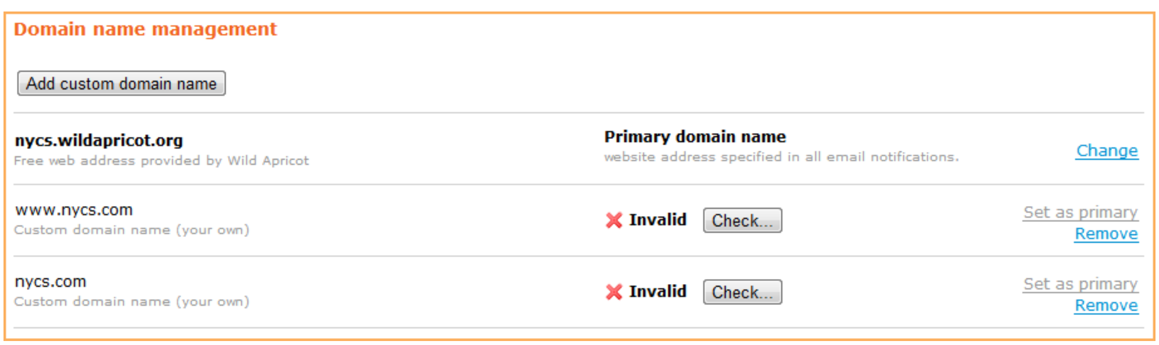
Read more/less



Checking your domain name status

If any of your custom domain names is marked as **Invalid**, it means that our system has detected incorrect DNS records for your custom domain.

Read more/less



You can click the **Check** button for more information.

As part of setting up a custom domain, you (or your domain registrar) need to:

- modify your domain's A-record to point to Wild Apricot's IP address (34.226.77.200)
- create a SPF TXT record that allows Wild Apricot servers to send emails on your behalf

For more information, see Custom domain setup.

If the status of your domain name is marked as **Incomplete**, then your domain's A-record was set up properly, but the SPF TXT record was not. In this case, all emails sent from your account will still use the default Wild Apricot email address based on your free Wild Apricot domain name.

Domain names that are marked as **Incorrect** or **Incomplete** cannot be set as your primary domain name.

On this page:

Expand all sections

Custom domain setup

Custom domain setup

Custom domains are only available to **paid** plans (see Functionality by billing plan).

When you create a Wild Apricot account, you are provided with a free website address. If you already have your own custom domain address, you can use your custom domain name in place of your free Wild Apricot address. For example, instead of using a free Wild Apricot address like *nycs.wildapricot.org*, you can use *www.nycs.net*.

Wild Apricot does not provide nameservers. You must use the default nameservers provided by your domain name provider.

Correctly setting up your domain can be tricky, and this is further complicated by the fact that domain setup process is different from one domain registrar to another. We have provided an overview of the process and key instructions – if you need any assistance with it, you should contact your domain name registrar.

1. Choose and Register Your Domain Name

Choose a domain name registrar. There are many companies that offer this service. From our experience, Hover.com and NetworkSolutions.com offer a competitive price and all the necessary capabilities for domain management.

Make sure that your selected domain name registrar offers online self-service for DNS management. This will give you direct control over the DNS records for your domain, and the ability to create and modify A, CNAME, and SPF records as needed. (Most registrars offer this as part of the basic domain registration, but there are still a few that do not.)

2. Set up your domain to point to Wild Apricot

Setting up with your domain name provider's assistance

Contact your domain name provider directly and ask for their assistance with the setup.

Don't know who your domain name provider is? Click here for instructions on how to find out.

Use the following email template – just copy and paste it, and adjust as required.

```
Please assist me with my domain name setup <MYDOMAIN.COM>
by modifying / adding the following DNS records to it:

1) CNAME
Name: www
Value: sites.wildapricot.org

2) A record
Name: yourdomain.org
Value: 34.226.77.200

3) TXT record
Name: yourdomain.org
Value: v=spf1 mx include:wildapricot.org ~all
```

Within your email, replace both occurrences of *yourdomain.org* with your custom domain name. With some domain registrars, the name is not required.

Setting it up yourself

If you want to set up your custom domain yourself, following the instructions below.

We have also provided a more detailed examples for two domain registrars – see GoDaddy DNS setup instructions and Network Solutions DNS Setup Example. Even if you are using a different domain registrar, you might still find these two examples helpful.

"CNAME" record

First set up a canonical name (CNAME) of *www* for your DNS servers which points to sites.wildapricot.org.

For example:

```
Name: www
Value: sites.wildapricot.org
```

Copy this code exactly as shown above – do not replace *sites.wildapricot.org* with anything else (except the legacy domain *memberlodge.org*) .

> This only sets up *www.yourdomain.org* and not *yourdomain.org*.

"A" record

If you want *yourdomain.org* (without the leading *www*) to work as well, you need to set up an A-record for *yourdomain.org* to point to our server IP address **34.226.77.200**.

For example:

```
Name: @
Value: 34.226.77.200
```

The required value of Name could vary from provider to provider. In most cases, you would use @ or *yourdomain.org*. It may also not be required, in which case it would be blank. Follow up with your domain provider support for more details.

3. Set up SPF record for your domain

You need to create a TXT record for your domain (this is usually in the SPF setup section). This specifies that Wild Apricot servers are allowed to send emails on your behalf. Without a TXT record, the From email address will be automatically generated from the free sub-domain we provide you, and you will not be able to create a custom From address that is based on your custom domain. (For more information, see Organization details - email settings.)

If your domain currently does not have a SPF record, you should add one as follows:

```
Name: @
Value: v=spf1 mx include:wildapricot.org ~all
```

Copy the code exactly as shown above – do not replace *wildapricot.org* with anything else (except the legacy domain *memberlodge.org*), and make sure there's a space between *wildapricot.org* and *~all*.

> ⚠ If you are using a subdomain, enter your subdomain name in place of @ in the **Host** or **Name** field.

If you already have a TXT record then simply modify it by adding *include:wildapricot.org* before *~all*. For example:

```
v=spf1 include:wildapricot.org include:_spf.google.com ~all
```

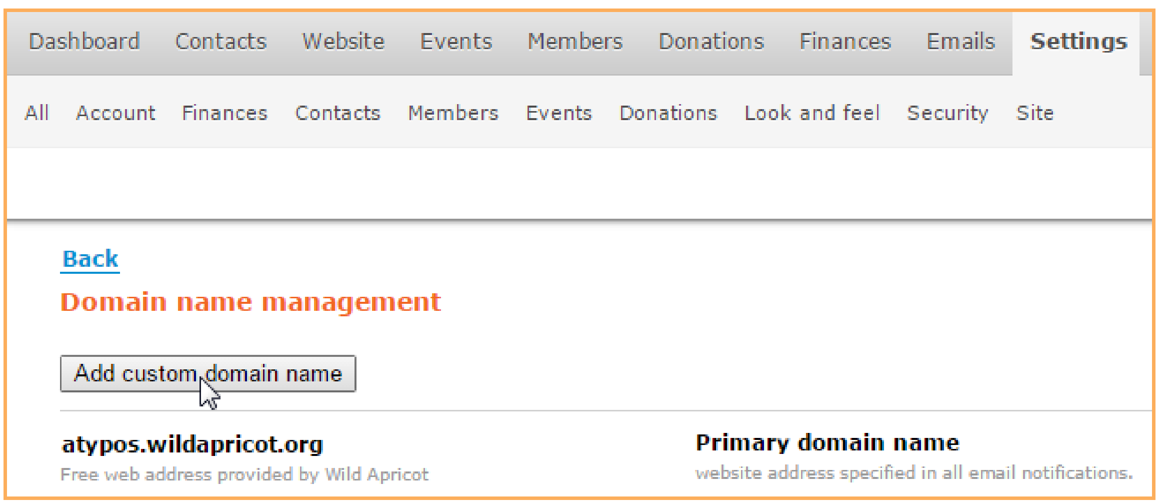
With some domain registrars the name is not required, or it can be set to your domain (e.g. *yourdomain.org*).

> ⚠ If you are already using an email hosting service to handle emails from your domain, you need to merge the include statements for both Wild Apricot and your email host. For instructions, click here.

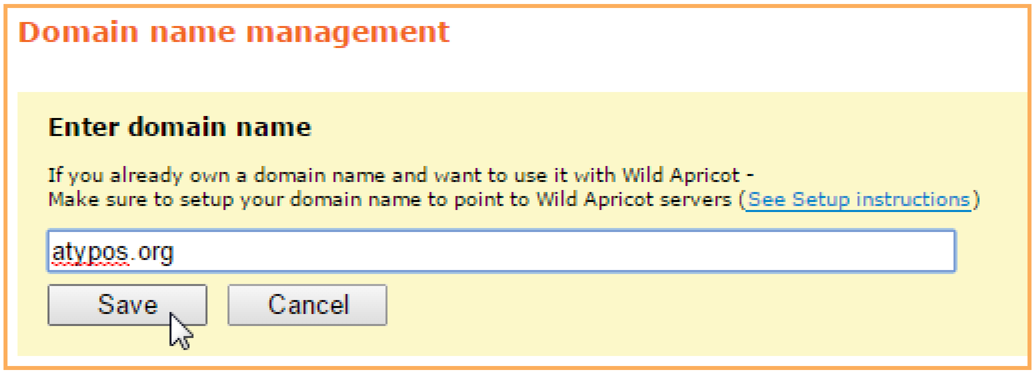
4. Add your custom domain to your Wild Apricot account

To add your custom domain name to your Wild Apricot account, follow these steps:

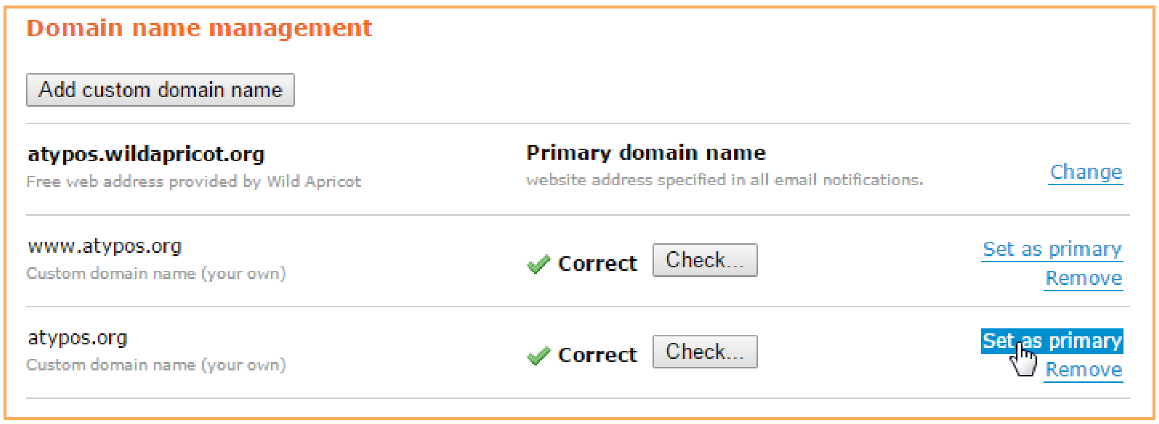
1. Click the **Settings** tab.
2. Under **Site settings**, click **Domain name management**.
3. Click the **Add custom domain name** button.



4. Enter your domain name, then click the **Save** button.



5. If you add a custom domain name without the *www* prefix, we will automatically add domains both with and without the *www* prefix. If you don't want to use both domains, you can remove one by clicking the **Remove** button beside the appropriate entry. If you want to keep both, you must designate one at the primary domain by clicking the **Set as primary** link beside the domain name.



While the process on Wild Apricot's end takes only a few minutes to complete, the process on your registrar's end can take 24-48 hours. During this time, your free Wild Apricot can function as a backup option.

Optional settings

Subdomain

Subdomain is a type of domain address. For example, if you have an existing website at www.abc.org, you can set up Wild Apricot on a subdomain like memberarea.abc.org. For more information on how to set this up, contact your domain name provider.

Email hosting

Wild Apricot does not include email hosting so if you are using your own domain, you have to set it up so that web traffic is sent to our servers while email traffic is sent to your email hosting company. You can use free email hosting, for example from Google (see Using email hosting services).

Traffic encryption

Wild Apricot provides free encrypted access to *wildapricot.org* domains. You can use the secure *wildapricot.org* domain in addition to your regular website address, or you can switch your website to the *wildapricot.org* domain. For custom domains, you can also use the *wildapricot.org* domain for secure access, or we can install your own custom security certificate on your custom domain. For details, see Securing custom domains.

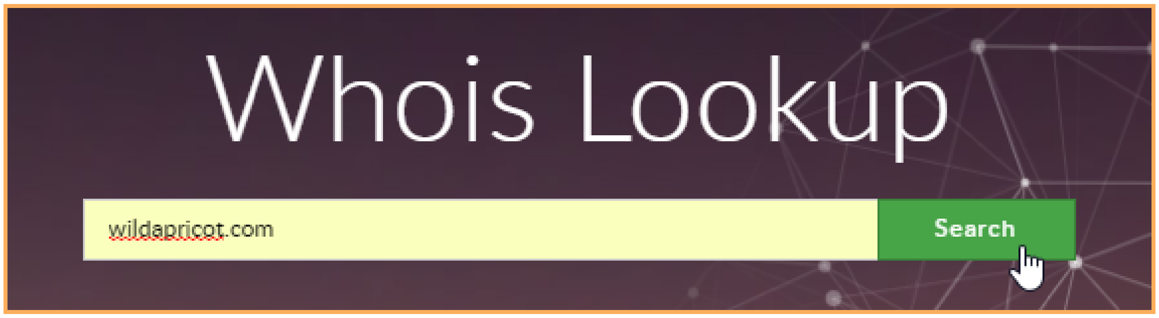
Do not enable traffic encryption for a custom domain without an installed custom security certificate. If you do, visitors will be warned of a possible security issue with your site.

For example, if your custom domain is http://www.abc.org, a free secure URL for your account would be https://abc.wildapricot.org. Your own secure custom URL would be https://www.abc.org.

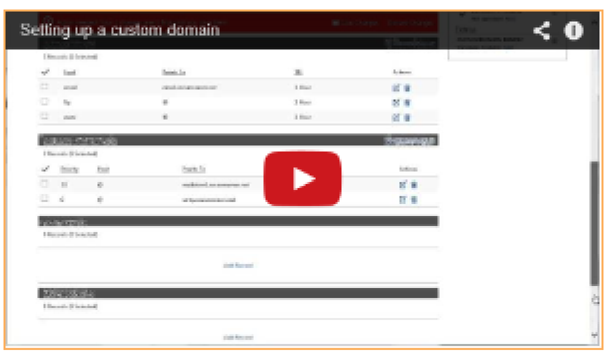
Who is my domain name registrar?

If you don't know who's the domain name registrar for your domain, follow these steps to find out:

1. Click here.
2. Enter your domain name and click the **Search** button.



3. Within the search results – or further down in the raw details – look for the name of your registrar in the Registrar field.



Video: Setting up a custom domain 3:35

On this page:

- Optional settings
    - Subdomain
    - Email hosting
    - Traffic encryption
- Who is my domain name registrar?

See also:

- Custom domain setup troubleshooting
- GoDaddy DNS setup instructions
- Network Solutions DNS Setup example
- Using email hosting services

GoDaddy DNS setup instructions

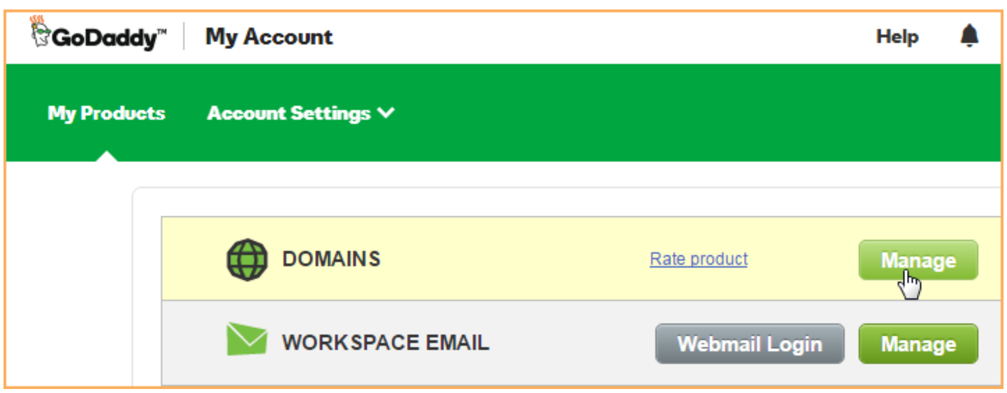
GoDaddy DNS setup instructions

When you create a Wild Apricot account, you are provided with a free website address. If you already have your own custom domain address, you can use your custom domain name in place of your free Wild Apricot address. If you are using GoDaddy as your domain registrar, follow these instructions to set up your GoDaddy account and Wild Apricot account to use your custom domain as the address for your Wild Apricot site.

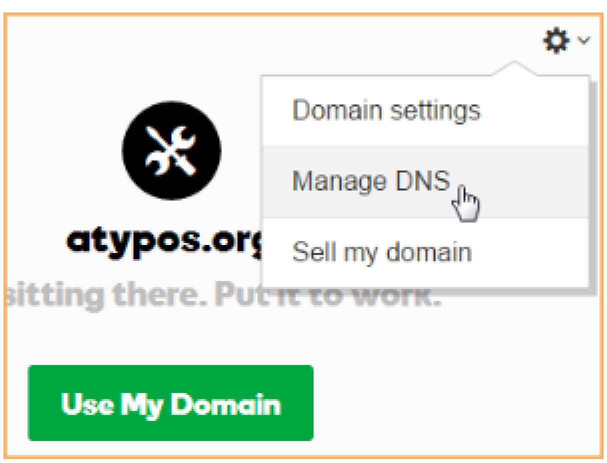
Setting up your GoDaddy account

To set up your GoDaddy account to use your custom domain as your Wild Apricot site address, follow these steps:

1. Log in to your GoDaddy account at http://www.godaddy.com.
2. From your account page, click the **Manage** button within the **Domains** section.



3. For the domain that you'd like to use as the address for your Wild Apricot site, click the **Settings** drop-down and select the **Manage DNS** option.

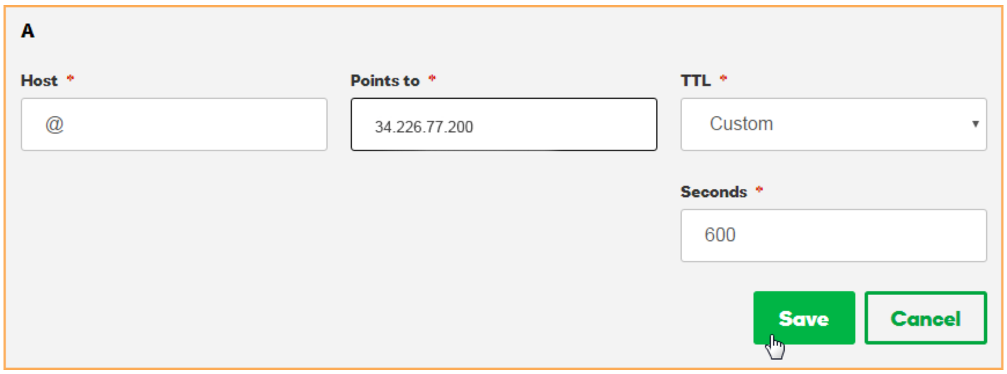


4. Within the row where **Type = A** and **Name = @**, click the pencil icon to enter edit mode.

If there is no such row, click **Add Record** to add one.

> ⚠ You should have only one A record entry. Otherwise, problems may occur.

5. Enter **34.226.77.200** in the **Points to** field, then click **Save**.

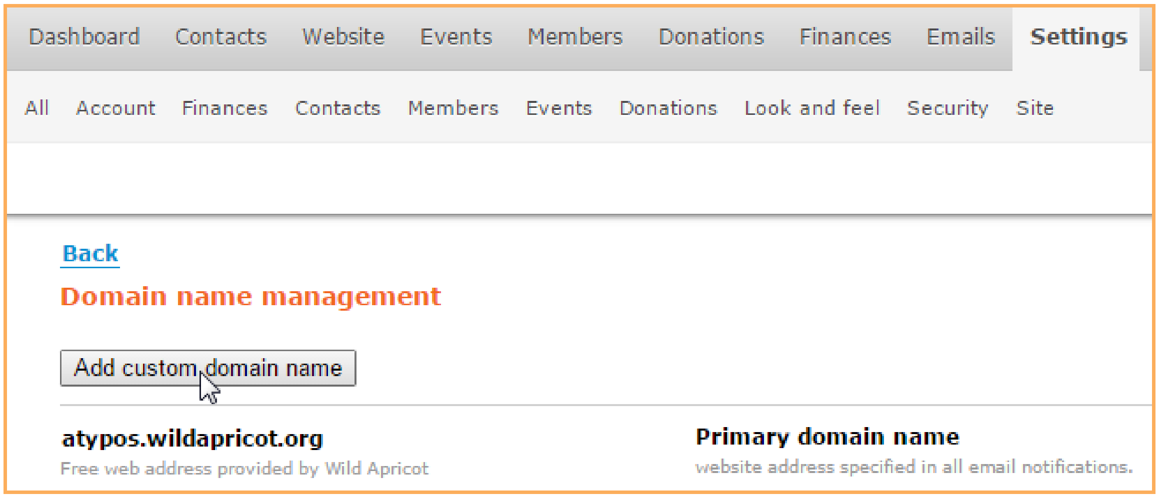


6. Within the row where **Type = CNAME** and **Name = www**, click the pencil icon. If there is no **such row**, click **Add Record** to add one.
7. Enter **sites.wildapricot.org** in the **Points to** field, then click **Save** .
8. Within the row where **Type = TXT** and **Name = @** (or your domain name), click the pencil icon. If there is no such row, click **Add Record** to add one.
9. Enter @ in the **Host** field.
10. In the **TXT Value** field, enter **v=spf1 mx include:wildapricot.org ~all** then click **Save** .

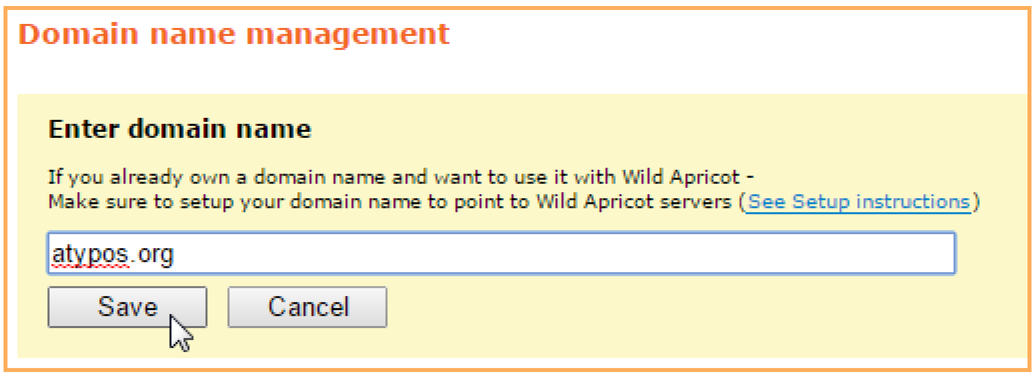
Adding your custom domain to your Wild Apricot account

To add your custom domain name to your Wild Apricot account, follow these steps:

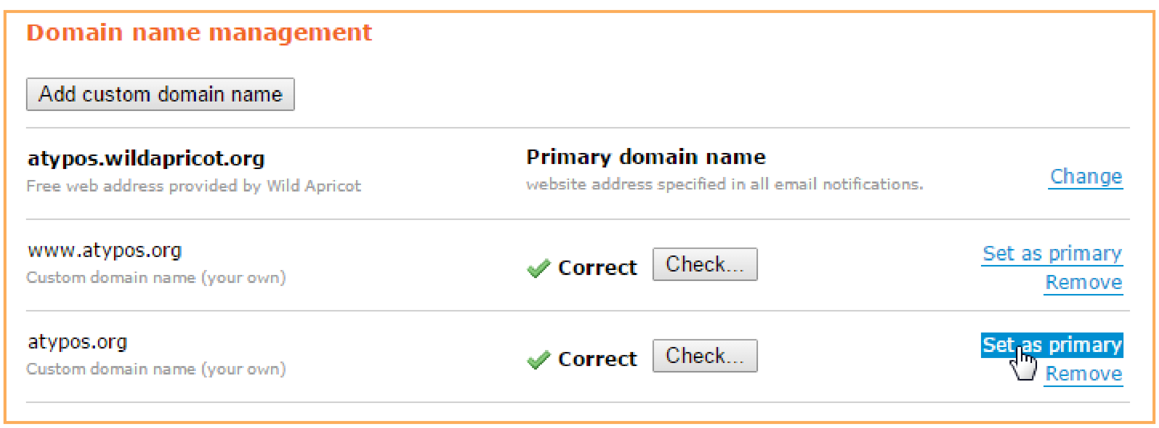
1. Click the **Settings** tab.
2. Under **Site settings**, click **Domain name management**.
3. Click the **Add custom domain name** button.



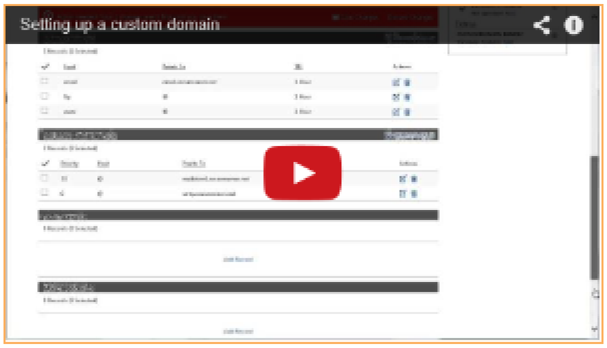
4. Enter your domain name, then click the **Save** button.



5. If you add a custom domain name without the *www* prefix, we will automatically add domains both with and without the *www* prefix. If you don't want to use both domains, you can remove one by clicking the **Remove** button beside the appropriate entry. If you want to keep both, you must designate one at the primary domain by clicking the **Set as primary** link beside the domain name.



While the process on Wild Apricot's end takes only a few minutes to complete, the process on your registrar's end can take 24-48 hours. During this time, your free Wild Apricot can function as a backup option.



Video: Setting up a custom domain 3:31

On this page:

- Setting up your GoDaddy account
- Adding your custom domain to your Wild Apricot account

See also:

- Custom domain setup
- Custom domain setup troubleshooting
- Using email hosting services

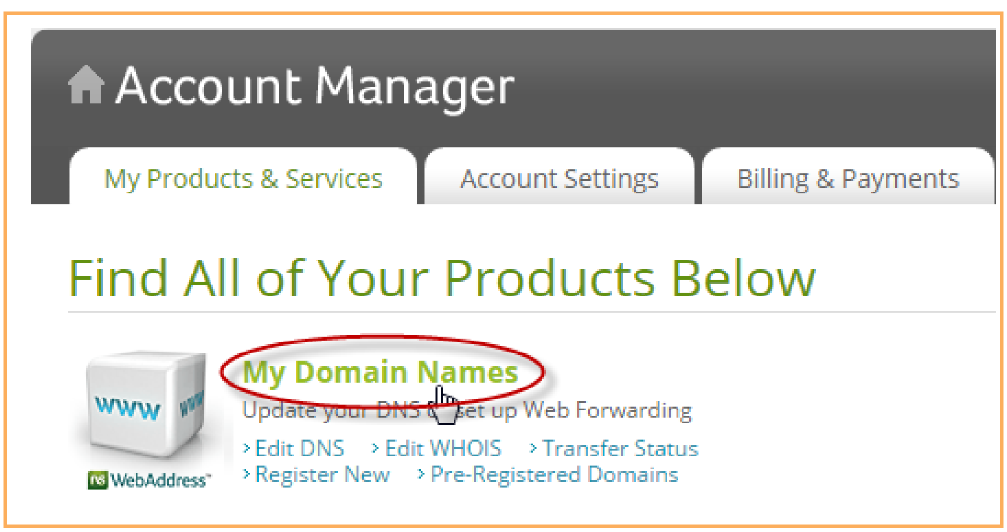
Network Solutions custom domain setup

Network Solutions custom domain setup

When you create a Wild Apricot account, you are provided with a free website address. If you already have your own custom domain address, you can use your custom domain name in place of your free Wild Apricot address. If you are using Network Solutions as your domain registrar, follow these instructions to set up your Network Solutions account and Wild Apricot account to use your custom domain as the address for your Wild Apricot site.

Updating your domain to point to your Wild Apricot website

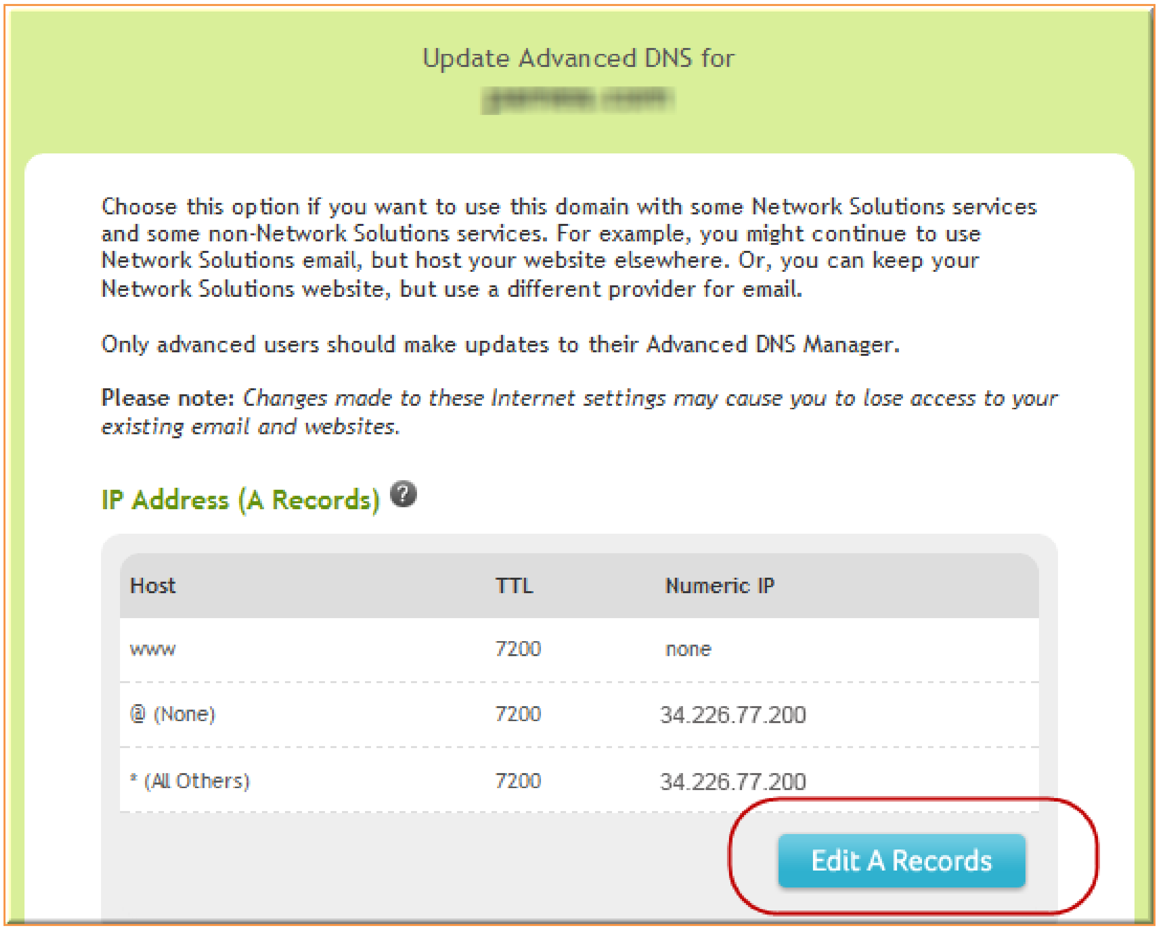
1. Log into your Network solutions account and click **Manage Account.**
2. Within Account Manager, click **My Domain Names**.



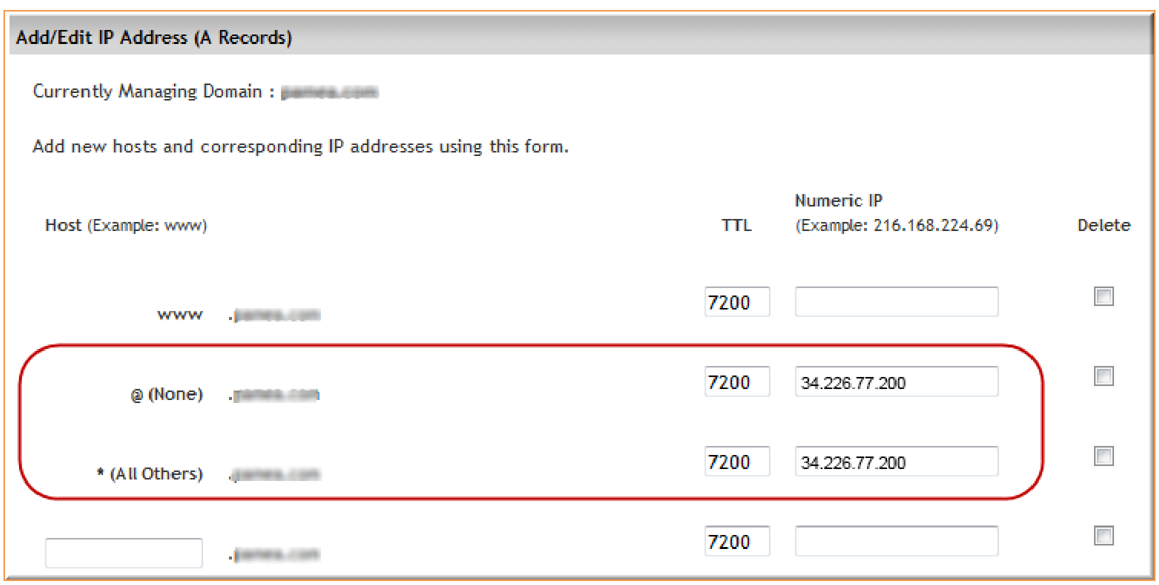
3. Select the domain name you want to change and select **Manage**.
4. In the green box, select **Change Where Domain Points**.
5. Select **Advanced DNS**.
6. Select the type of record you would like to set up.

Set up the A-Record

1. Click on **Edit A Records**.



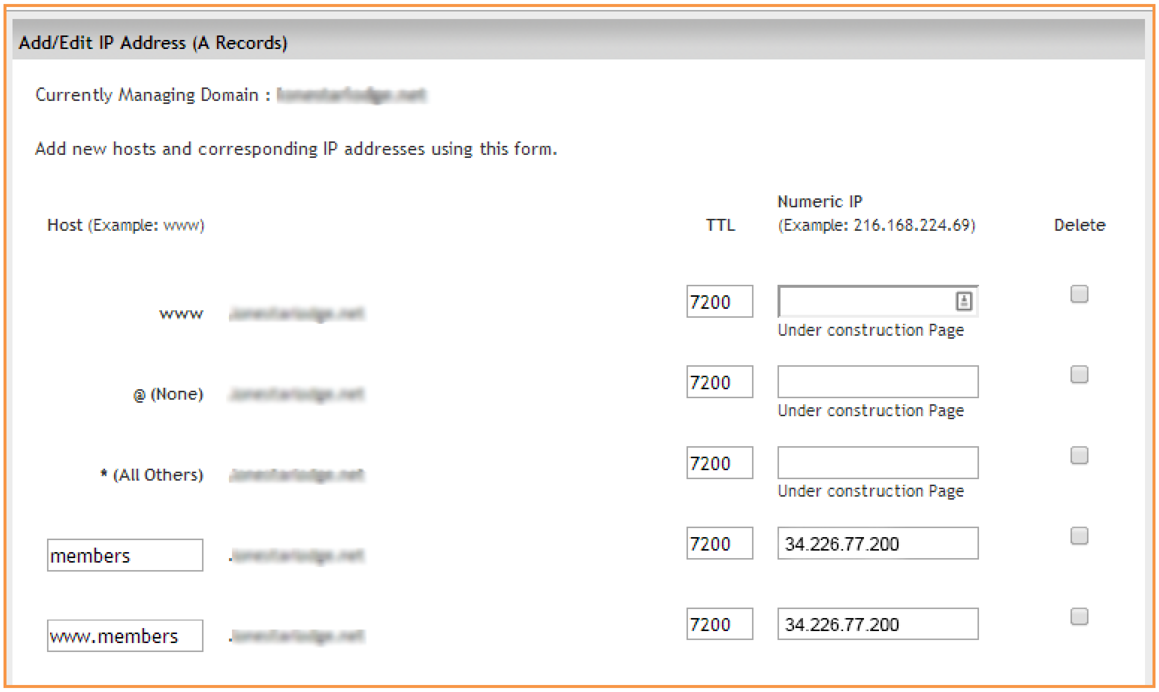
2. Set @ (none) to **34.226.77.200** and click **Continue**.



Leave the A-record **www** box empty.

Creating a sub-domain

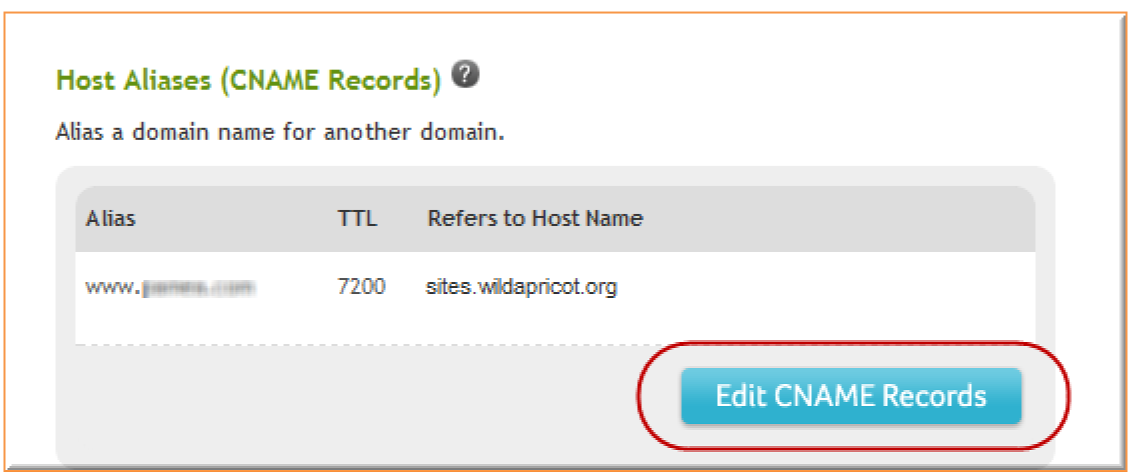
If you would like to use a sub-domain instead (e.g. members.myorg.com), then type the sub-domain in the host field, and set its IP to **34.226. 77.200**.



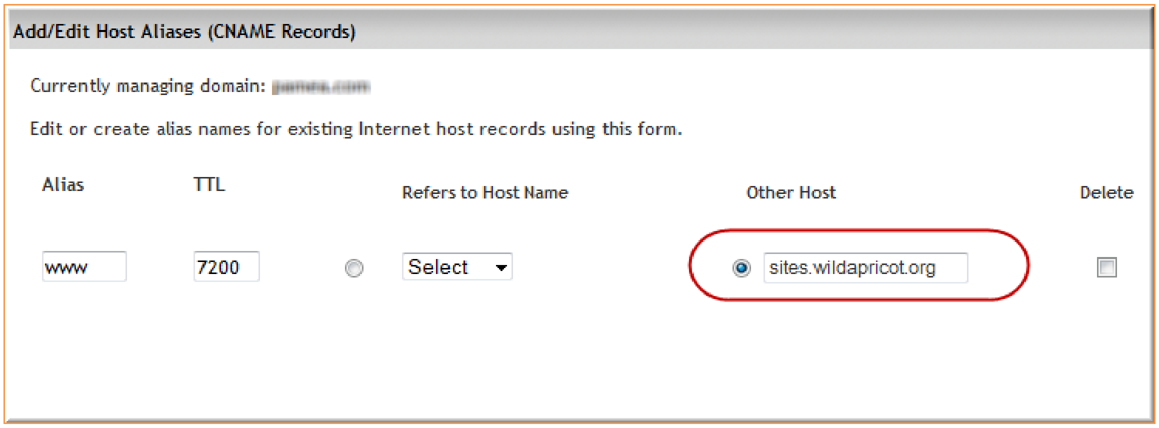
Set up CNAME

For a sub-domain skip this step

1. Click on **Edit CNAME Records**.

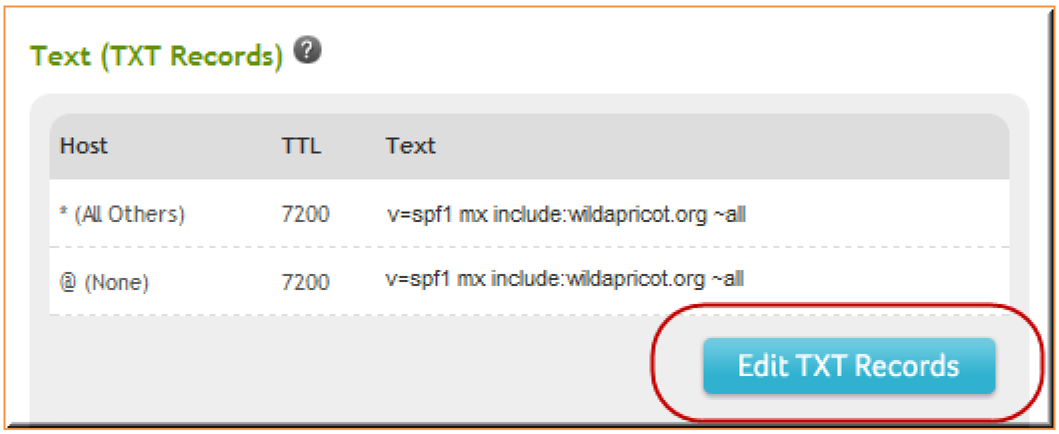


2. Set **www** to **sites.wildapricot.org** and click **Continue**.

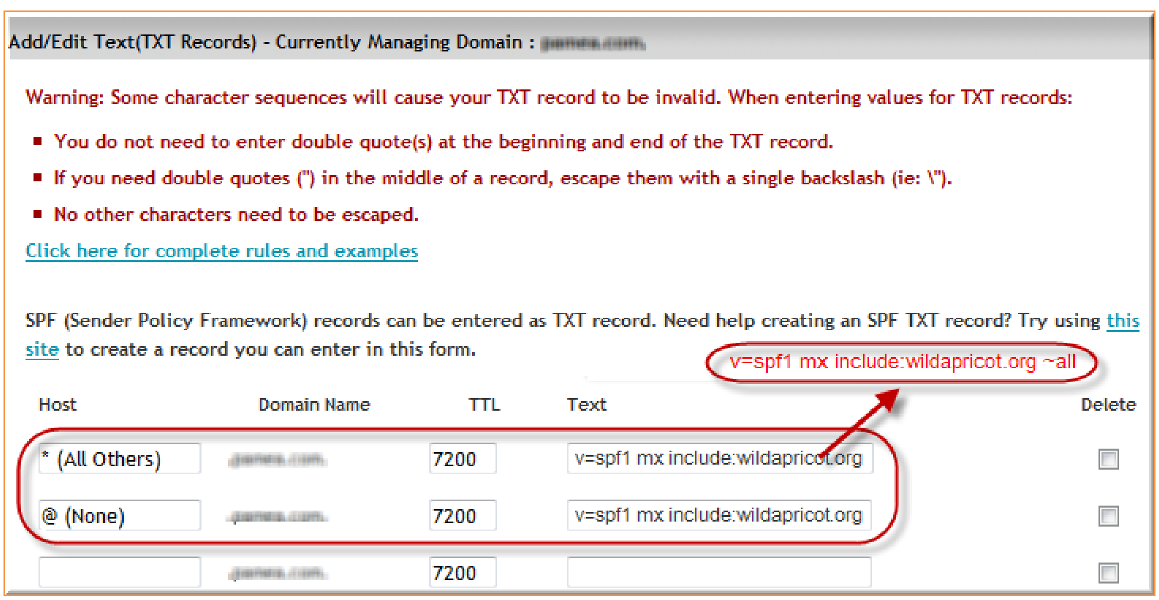


Set up SPF TXT record

1. Click **Edit TXT Records**.



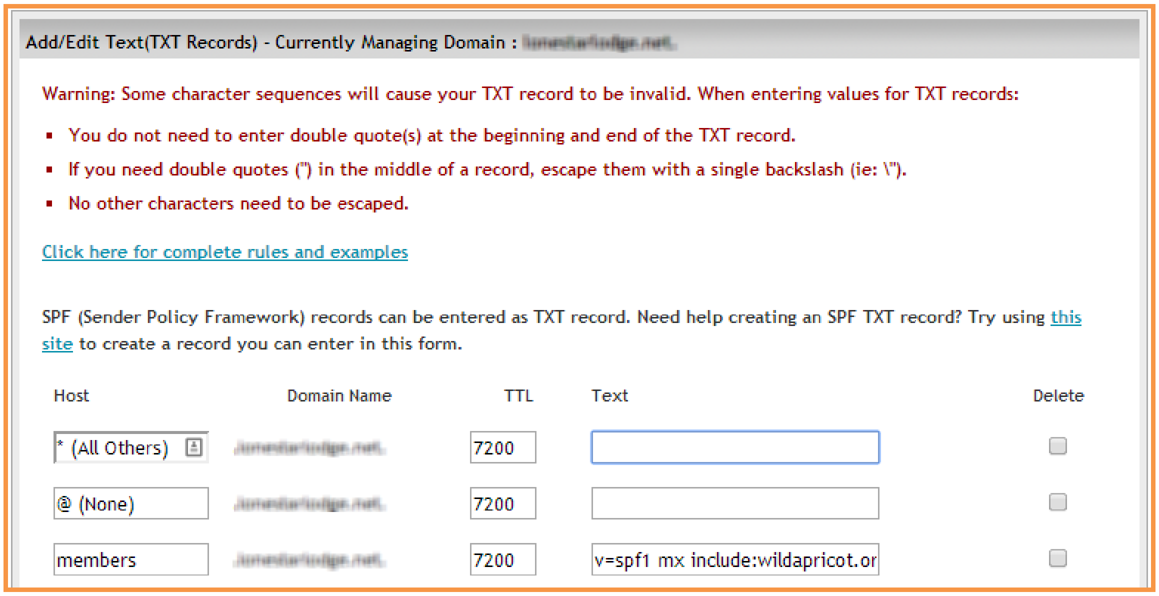
2. Add Text record: **v=spf1 mx include:wildapricot.org ~all** and click **Continue**.



Setup TXT record for sub-domain

If using a sub-domain instead, then enter sub-domain in the Host field, and set it to:

```
v=spf1 mx include:wildapricot.org ~all
```



Setting up your domain in Wild Apricot

Once you have made these changes make sure you add your domain to your domain name management (see Domain Name Management).

On this page:

- Updating your domain to point to your Wild Apricot website
- Set up the A-Record
  - Creating a sub-domain
- Set up CNAME
- Set up SPF TXT record
  - Setup TXT record for sub-domain
- Setting up your domain in Wild Apricot

See also:

- Custom domain setup
- Custom domain setup troubleshooting
- Using email hosting services

Custom domain setup troubleshooting

Custom domain setup troubleshooting

Here are solutions to common issues with custom domain setup.

Browser displays a security warning when visitors access your site

If traffic encryption is enabled for a custom domain without an installed custom security certificate, visitors will be warned of a possible security issue when they try to access your site. To resolve this, you can purchase a security certificate, or set your traffic encryption options to **Payments only**.

How to access your site when custom domain malfunctions

Your Wild Apricot account comes with free domain (e.g. nycs.memberlodge.org) that, if your account's custom domain name malfunctions, can always be used to access your account. This domain is always present, it cannot be remove but you can rename it if required, see Domain name management. If you do not remember this domain name, you can always find it in the emails that were sent to you when you first opened Wild Apricot account.

Check your DNS records

On average, it might take up to 48 hours for DNS records on Internet to pick up your new settings (though usually it happens much faster). If it is not working after this period you might need to check your settings.

As a first step, check that your DNS records are showing correct information. For more details and help on this contact your domain name host.

Check your setup

It is important that you follow setup steps, see Custom domain setup, since it is the only correct way to setup your Wild Apricot account to work with your custom domain name. Make sure to avoid the following mistakes:

- One of the most common mistakes for custom domain setup is **a domain redirect** to your Wild Apricot domain.
- Also, avoid setting up your custom domain by putting Wild Apricot site within an **iframe** (aka domain masking).
- Make sure that you add custom domain to the domain list and set it as **primary**. See: Domain name management

These mistakes can create all kinds of problems, including the following: PayPal payment problems, reset password problem, broken registration links etc.

DNS Servers

We do not provide DNS servers ourselves since most domain registrars already provide this service at no charge for every domain (e.g. godaddy.com registrar in our example). However, if you have registered your domain through one of small reseller domain registrars you might not have direct access to your DNS settings, just the ability to change your DNS servers.

Here are your options in this case:

- Contact your domain registrar and ask if they can set it up manually for you - use their domain servers to point your domain to our server (via CNAME or IP address). This is the best option as many domain registrars can do this even if they do not provide web-based self-service interface for you to do it. The biggest challenge is to get hold of a knowledgeable service rep at the domain registrar - since this is a relatively rare situation, many service reps will have hard time understanding what you need them to do.
- Contact your hosting company (the one whose DNS servers you currently use) and ask them to change their name server settings to point website to us. Whether they would do it or not - and what would they charge - depends on a particular hosting company. This is the option to follow if you will still use the hosting company for email hosting.
- Transfer your domain to another registrar which provides DNS servers and online access to their settings. This takes a few days and incurs a one-time charge (depends on each registrar).

Email hosting note

Be careful regarding your email. We do not provide email hosting with Wild Apricot account (we think it is better left to experts!) so make sure not to change the email settings for your domain. Your email should work in exactly the same way it worked before you make the website domain change above.

On this page:

See also:

- Custom domain setup
- Domain name management

- GoDaddy DNS setup instructions
- Using email hosting services

Changing your DNS settings to point to a different IP address

Changing your DNS settings to point to a different IP address

Your DNS settings provide the link between your custom domain name and the IP address of the network where Wild Apricot is hosting your site. When you set up a custom domain, or when Wild Apricot changes its IP address, you'll need to get your DNS settings updated to point to the new IP address.

To get your DNS settings updated, you'll need to contact your domain name provider – the company that is hosting your custom domain name – or access your domain name account online .

> If you don't know who your domain name provider is, click here then enter your domain name in the field and click the **Search** button. Within the search results, look for the name of your domain name provider in the **Registrar** field.

The domain setup process differs from one domain registrar to another, so we have provided the following instructions to help you:

- Instructions to give your domain name provider
- Generic instructions for updating the settings yourself
- Updating the settings from your GoDaddy account
- Updating the settings from your Network Solutions account
- How to tell if your custom domain is pointing to the new IP address yet

Instructions to give your domain name provider

If you want your domain name provider to make the changes to your DNS settings for you – either by phone or by email – explain to them that you need to change which IP address your domain name is pointing to. Then, ask them to do two things:

1. Confirm the following CNAME setting:

```
CNAME
Name: www
Value: sites.wildapricot.org
```

   If your CNAME setting is different, ask them to change it to match the above.

2. Change your A record to match the following:

```
A record
Name: yourdomain.org
Value: 34.226.77.200
```

   where *yourdomain.org* is your custom domain name. Make sure they update the existing A record and do not create another A record.

If you're communicating with your domain name provider by email, you could just copy and paste the following email template:

```
Please help change which IP address my <yourdomain.org> is pointing to by making the
following changes to my DNS settings:

1) CNAME
Name: www
Value: sites.wildapricot.org

2) A record
Name: yourdomain.org
Value: 34.226.77.200

Please update the existing A record instead of creating a new one.
```

Within your email, replace both occurrences of *yourdomain.org* with your custom domain name.

Generic instructions for updating the settings yourself

If you want to set up your DNS yourself, following the instructions below.

Check the CNAME record

Confirm that the canonical name (CNAME) of *www* for your DNS servers points to sites.wildapricot.org.

```
Name: www
Value: sites.wildapricot.org
```

If not, adjust the CNAME setting accordingly.

Change the A record

If you already have an A record set up to point to Wild Apricot's IP address, you need to change it to point to **34.226.77.200**.

For example:

```
Name: @
Value: 34.226.77.200
```

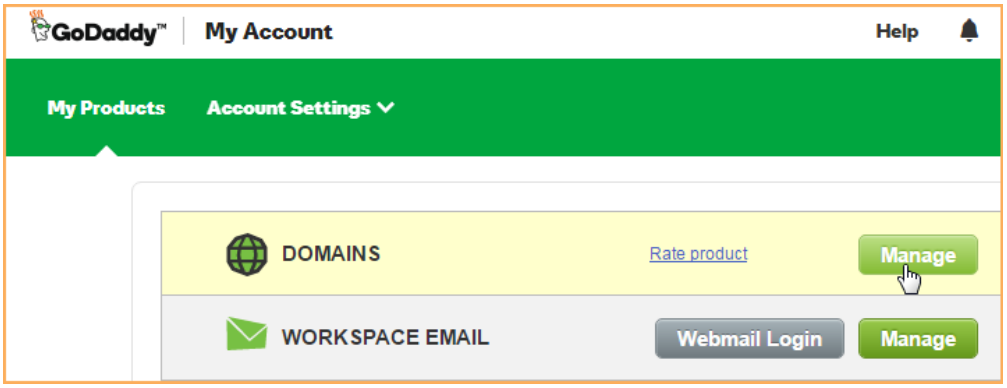
The required value of Name could vary from provider to provider. In most cases, you would use @ or *yourdomain.org*. It may also not be required, in which case it would be blank. Follow up with your domain provider support for more details.

Make sure you update the existing A record and do not create another A record.

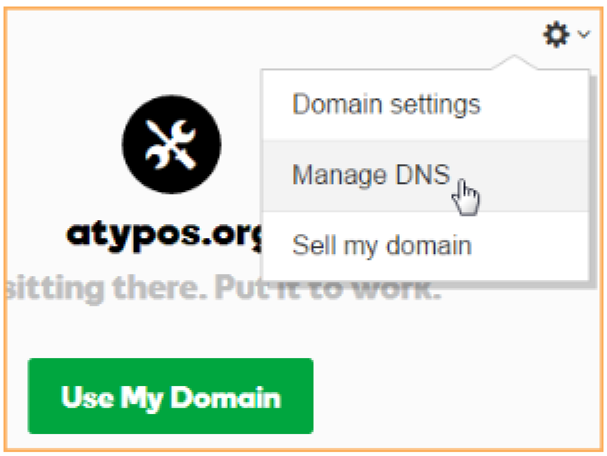
Updating the settings from your GoDaddy account

To change your DNS settings from your GoDaddy account, follow these steps:

1. Log in to your GoDaddy account at http://www.godaddy.com.
2. From your account page, click the **Manage** button within the **Domains** section.

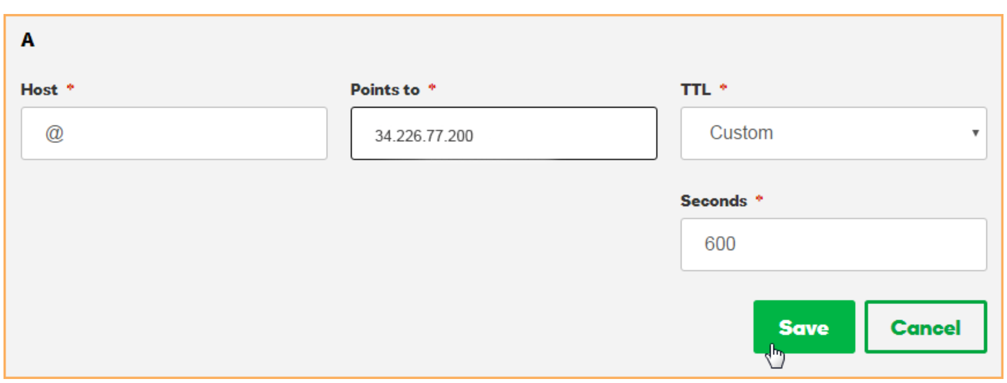


3. For the domain that you are using for your Wild Apricot site, click the **Settings** drop-down and select the **Manage DNS** option.



4. Within the row where **Type = A** and **Name = @**, click the pencil icon to enter edit mode.

5. Enter **34.226.77.200** in the **Points to** field, then click **Save**.

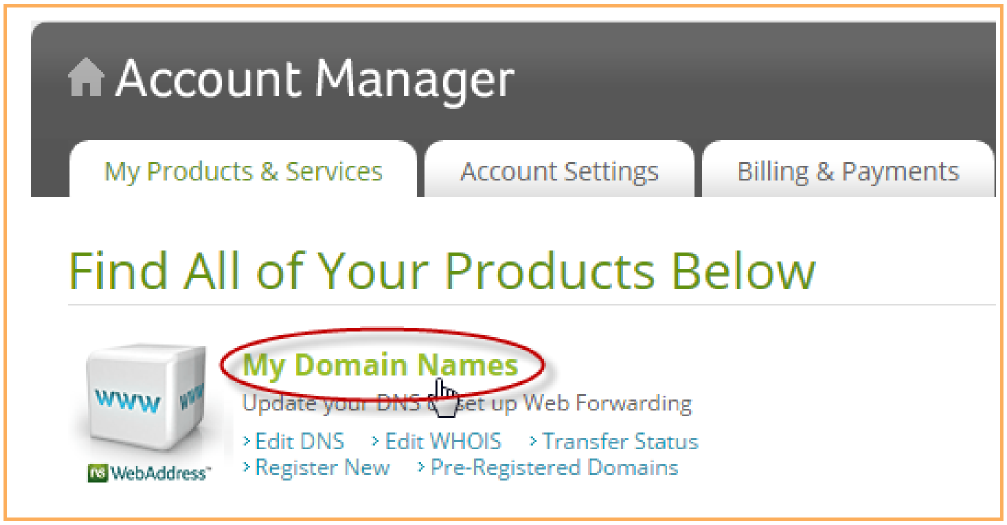


6. Within the row where **Type = CNAME** and **Name = www**, click the pencil icon.
7. Enter **sites.wildapricot.org** in the **Points to** field, then click **Save** .

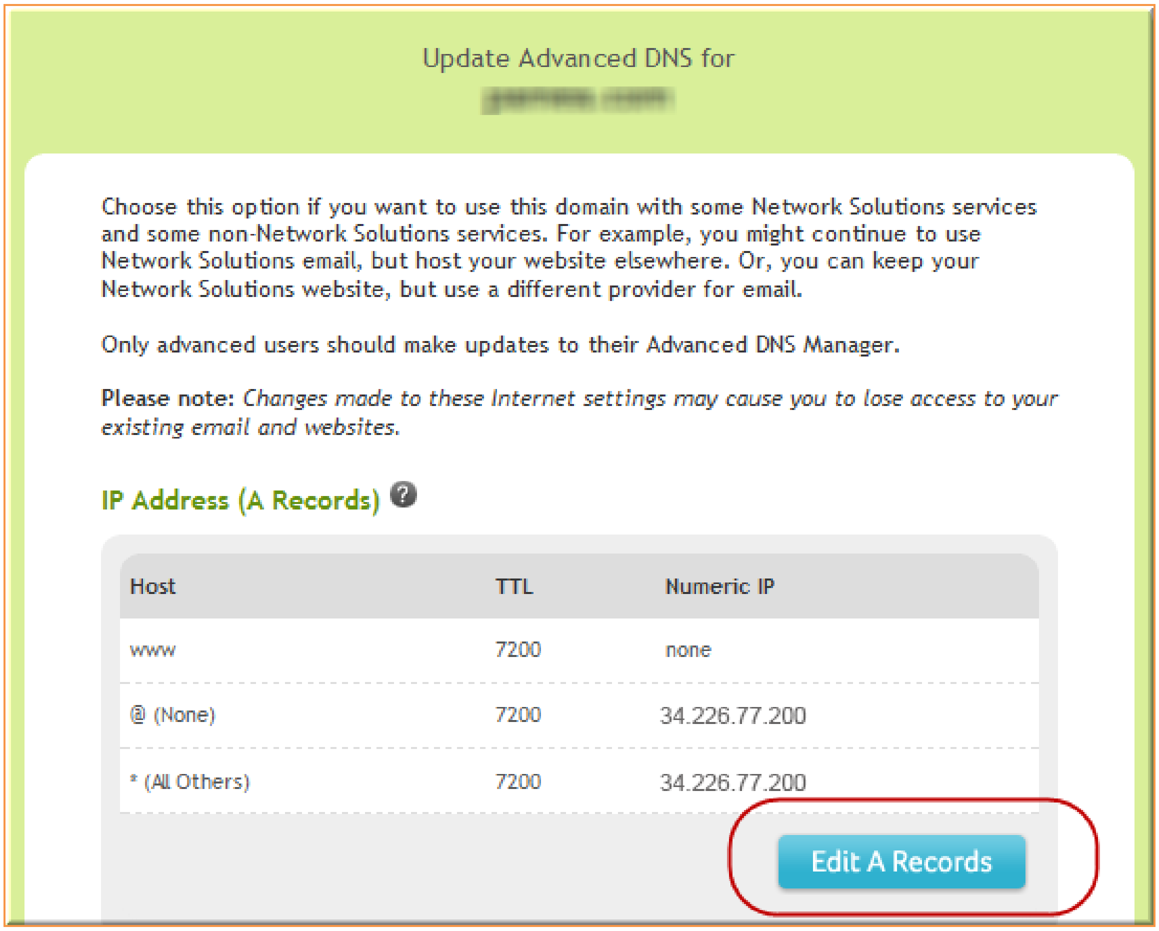
Updating the settings from your Network Solutions account

To change your DNS settings from your Network Solutions account, follow these steps:

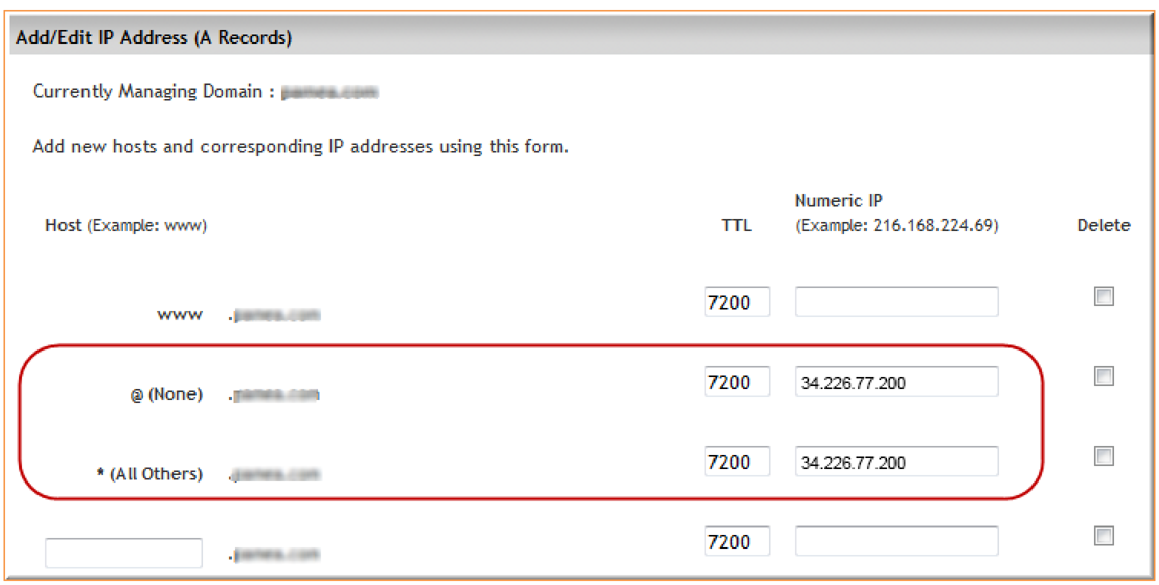
1. Log into your Network solutions account and click **Manage Account.**
2. Within Account Manager, click **My Domain Names**.



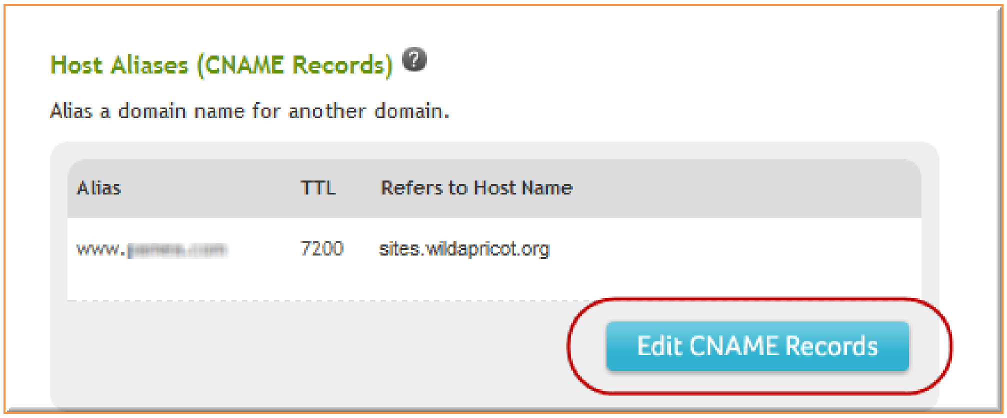
3. Select the domain name you want to change and select **Manage**.
4. In the green box, select **Change Where Domain Points**.
5. Select **Advanced DNS**.
6. Click on **Edit A Records**.



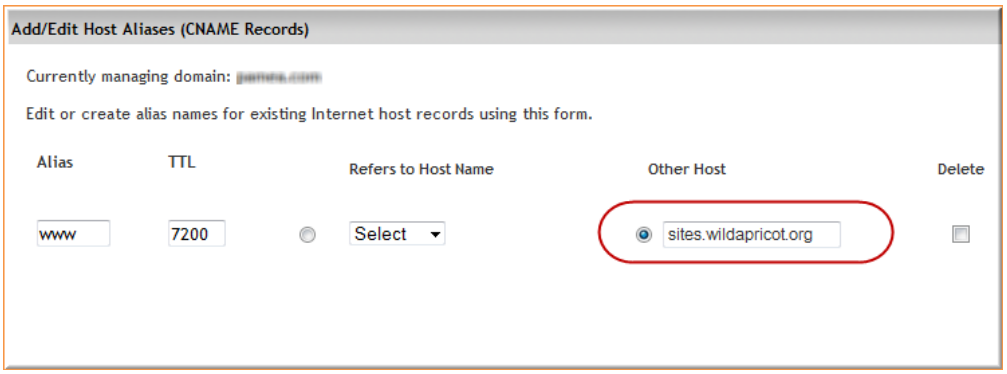
7. Set @ (none) to **34.226.77.200** and click **Continue**.



8. Click on **Edit CNAME Records**.



9. Set **www** to **sites.wildapricot.org** and click **Continue**.



How to tell if your custom domain is pointing to the new IP address yet

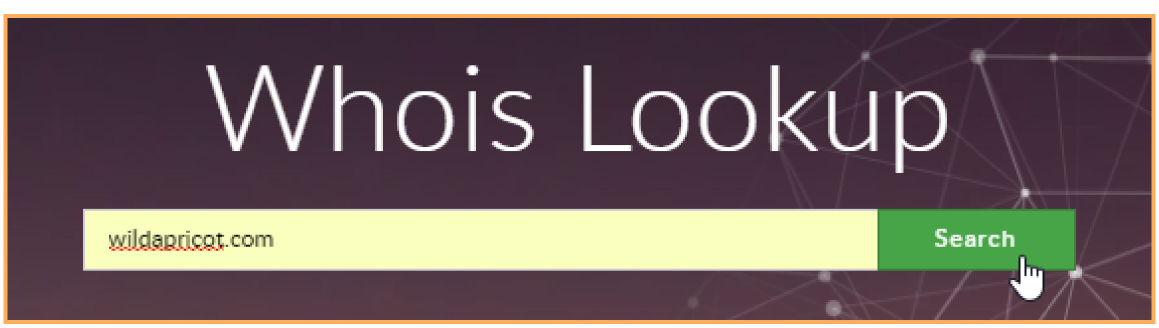
In Wild Apricot, click the **Settings** menu then click **Domain name** under **Site settings**. On the domain name management screen that appears, click the **Check** button beside each of your custom domain names. If your custom domain is pointing to the new IP address, a checkmark and a status of Correct will be displayed.

> ⚠ Remember, it can take between several days for your domain name provider to make the change, and several more days for the changes to propagate throughout the Internet, so don't panic if you continue to see your domain name setup flagged as invalid for a few days after updating your settings.

Who is my domain name registrar

If you don't know who's the domain name registrar for your domain, follow these steps to find out:

1. Click here.
2. Enter your domain name and click the **Search** button.



3. Within the search results – or further down in the Whois Record – look for the name of your registrar in the Registrar field.

On this page:

See also:

- Custom domain setup troubleshooting
- GoDaddy DNS setup instructions
- Network Solutions DNS Setup example

Site customization tutorials

Site customization tutorials

The following tutorials walk you through the steps involved in various site customizations.

- Tutorial: Adding a site-wide sidebar
- Tutorial: Applying branding to your site
- Tutorial: Creating a landing page
- Tutorial: Setting up a member-only portal

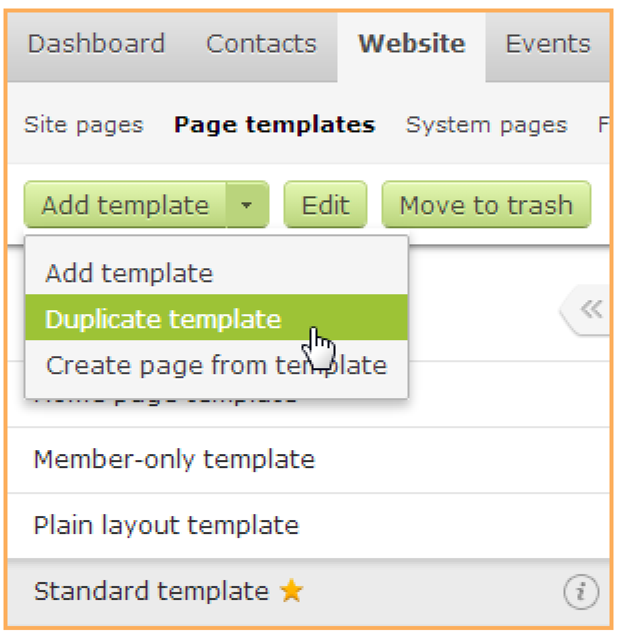
Tutorial: Adding a site-wide sidebar

Tutorial: Adding a site-wide sidebar

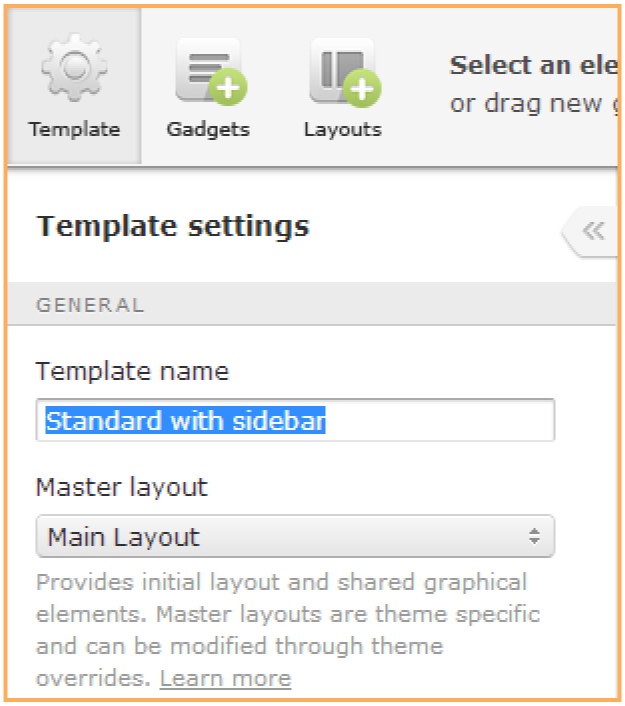
Let's say you want to add a sidebar to the left or right side of every page on your site. You want the sidebar to display the same information but you don't want to have to add it separately to each page. In this tutorial, we'll show you how to add a site-wide sidebar – like the one shown below – to every page in your site.

To add a sidebar like this, follow these steps:

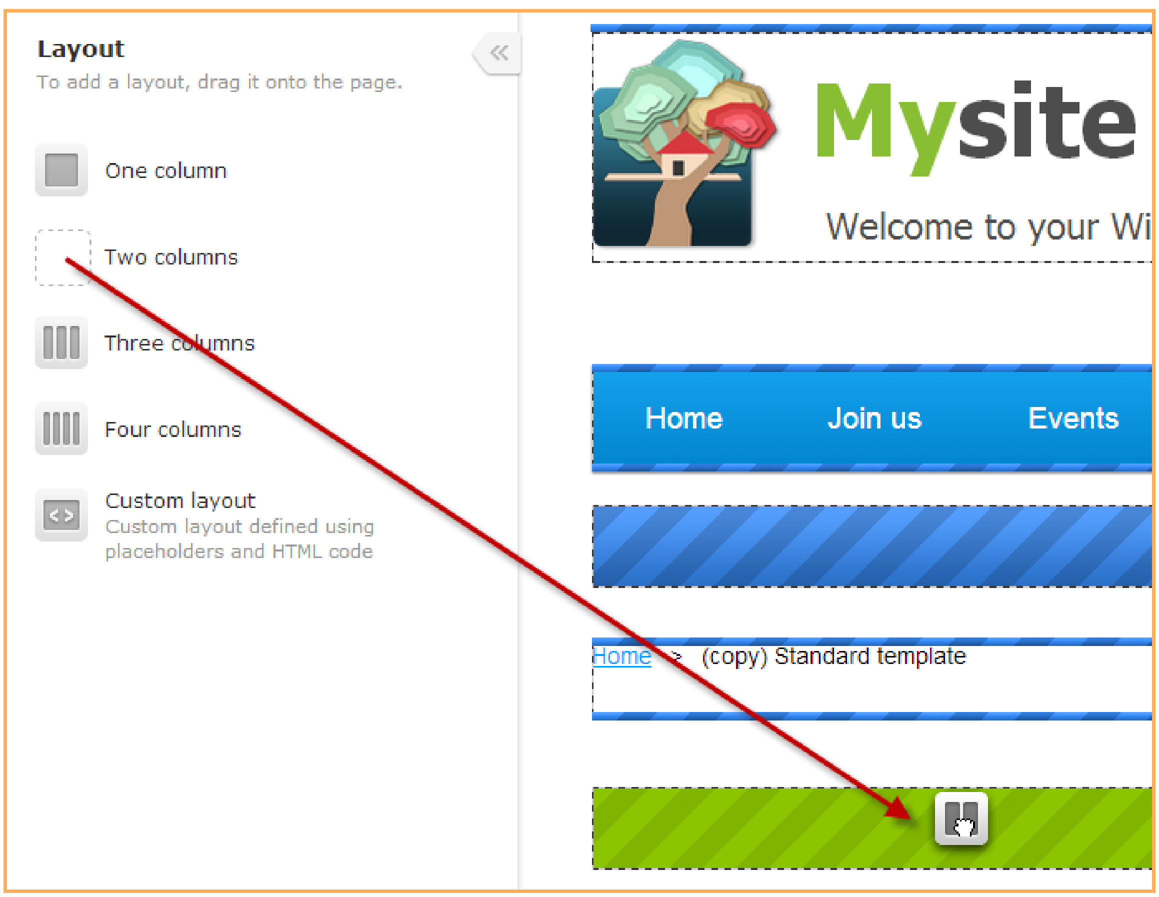
1. To add shared content to multiple pages, you add it to a page template. Under the **Website** menu, click the **Page templates** option.
2. Within the list of page templates, click the **Standard template**. We'll be using this template as the basis for a new template.
3. Click the down arrow within the **Add template** button and select the **Duplicate template** option.



4. A new template – a copy of the standard template – has been added to the list. With the new template selected, click the **Edit** button.
5. Within the template settings on the left, enter **Standard with sidebar** as the template name.

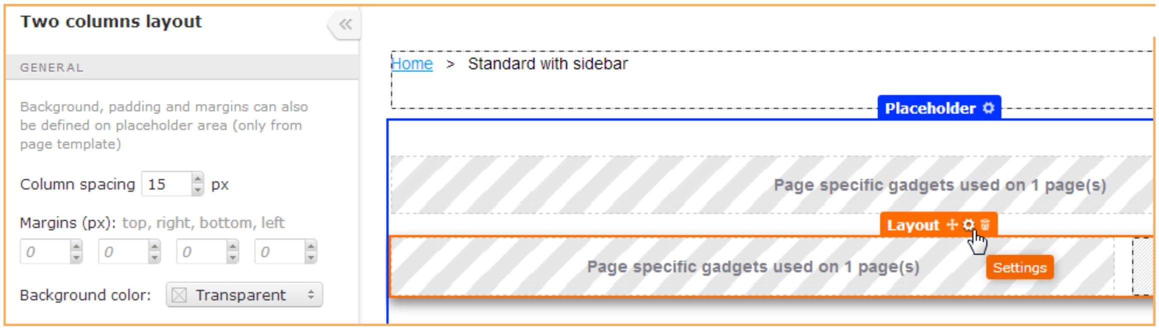


6. To divide the page in two, we'll add a two-column layout. Click the **Layouts** icon towards the top left to display the list of available layouts.
7. Drag the two-column layout from the list and drop it just below the existing breadcrumbs gadget (which should currently say **Home > (copy) Standard template**).



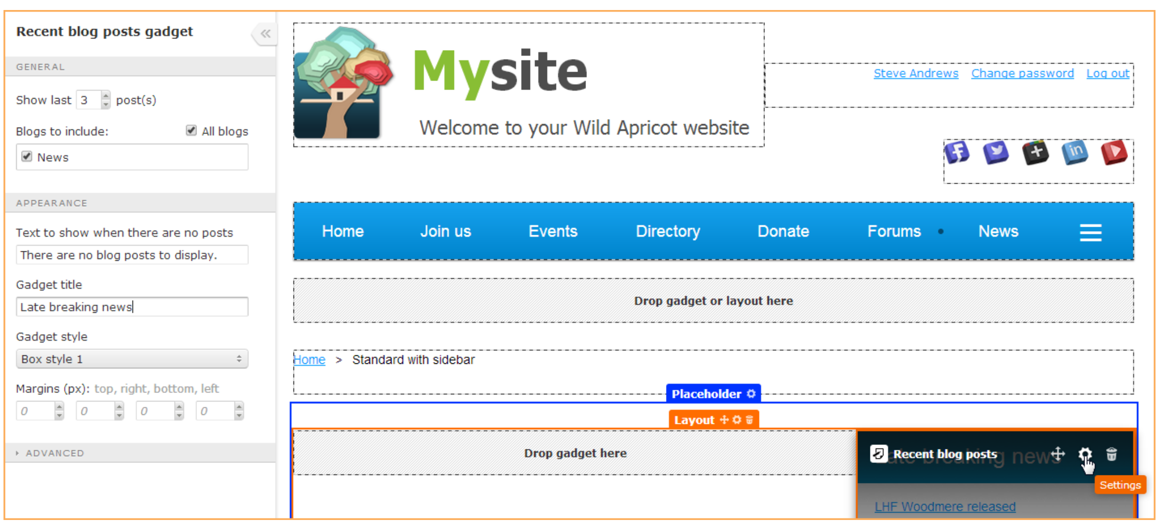
8. The two-column layout should now appear on the page. To resize the columns, so that the second column occupies about a third of the page, position your pointer over the column border and drag it to the right.

9. Within the layout settings, enter a value in the **Column spacing** field to provide a gap between the two columns.

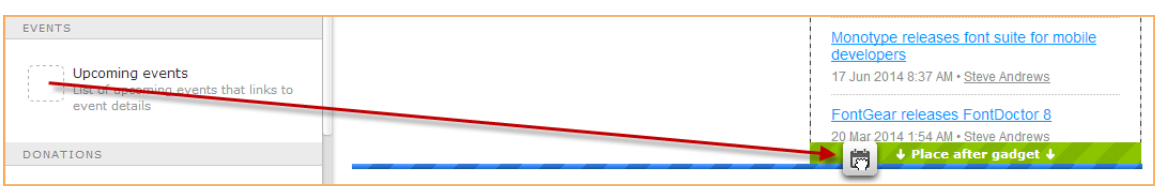


10. Now, that we've resized the column and set the column spacing, we can start adding the shared content to the sidebar column. Click the **Gadgets** icon towards the top left to display the list of available gadgets.
11. Drag the **Recent blog posts** gadget and drop it into the second column of the layout we just created.

12. Hover over the recent blog posts gadget you just added and click the Settings icon to display the settings for this gadget.
13. Within the gadget settings, change the gadget title from **Blog posts** to **Late breaking news**.

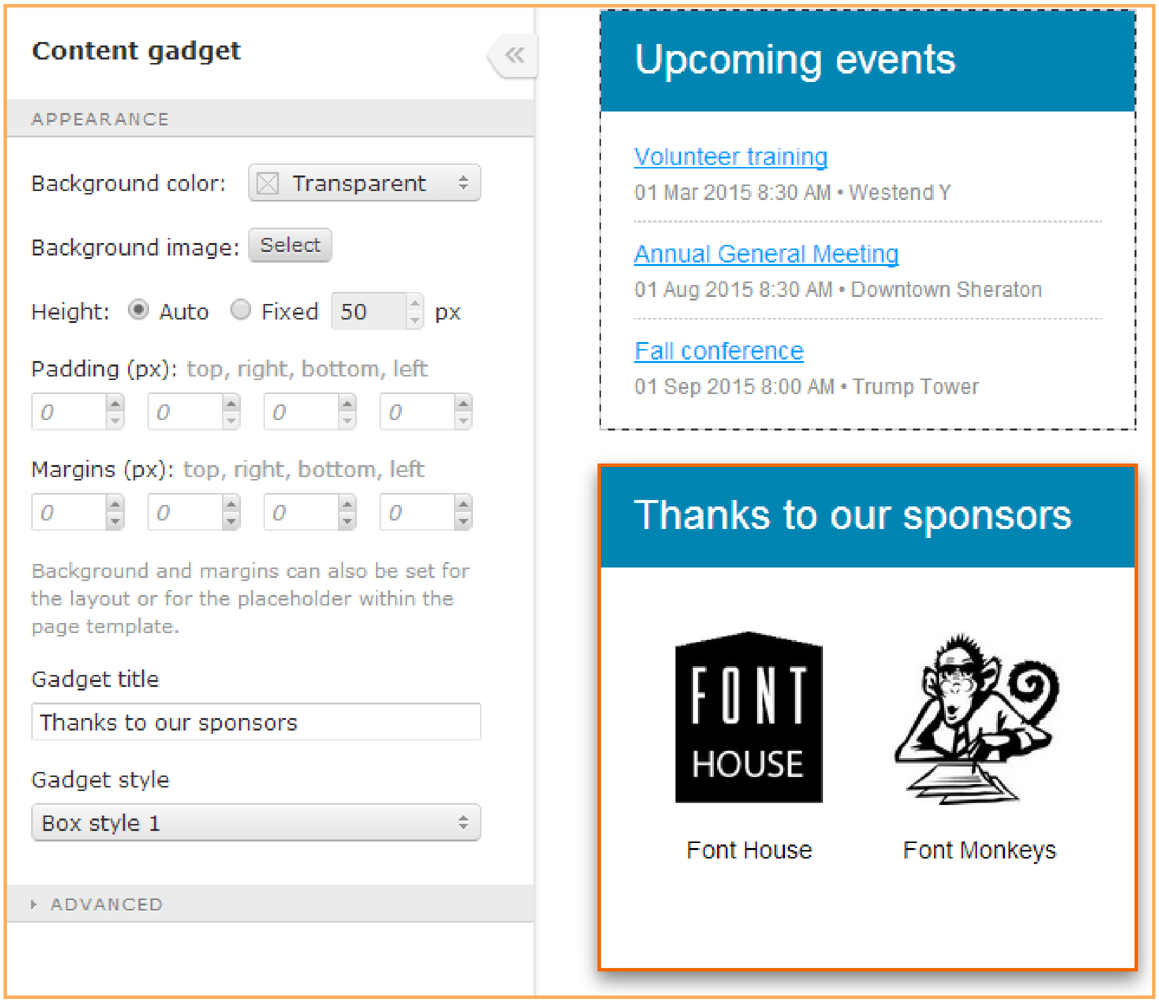


14. Now, display the Gadgets list again and drag and drop the **Upcoming events** gadget just below the recent blog posts gadget.

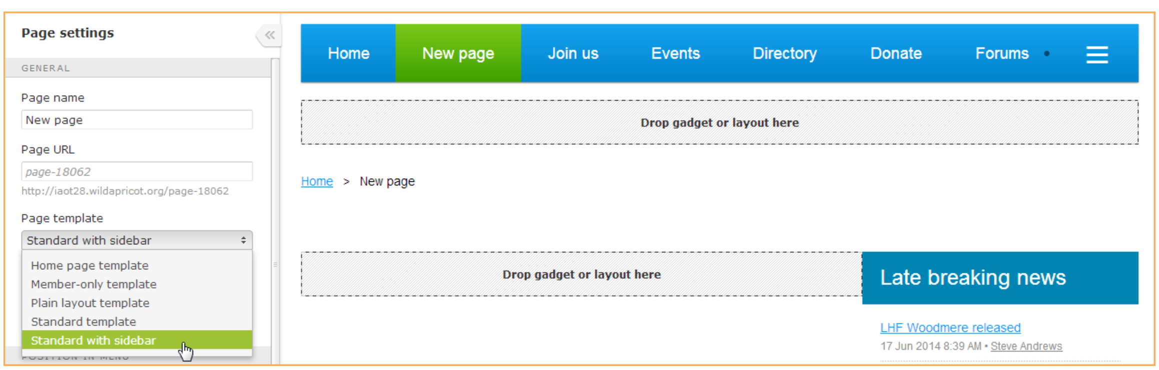


15. If you want to display sponsorship information at the bottom of the sidebar, add a content gadget below the upcoming events gadget.

16. Click within the content gadget and use the options appearing on the content editor toolbar to add sponsorship information. You can enter a gadget title and select a gadget style so that the content gadget shares the same look and feel as the other gadgets in the sidebar.



17. Click the **Save** button to save the changes to your template.
18. When you create a new page, you can select your new template as the page template, and place your page-specific content in the first column of the layout.



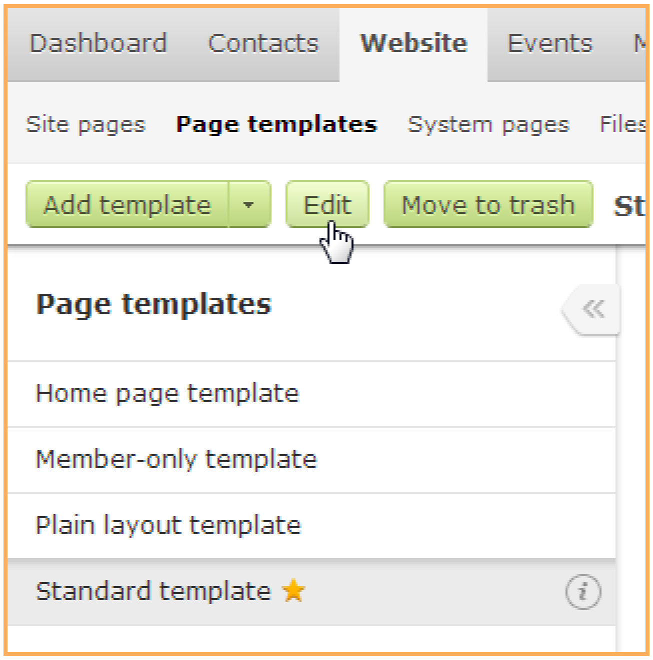
19. To use the template with an existing page, begin editing the page then select the new template from the **Page template** list. You can then move existing content into the first column.

Tutorial: Applying branding to your site

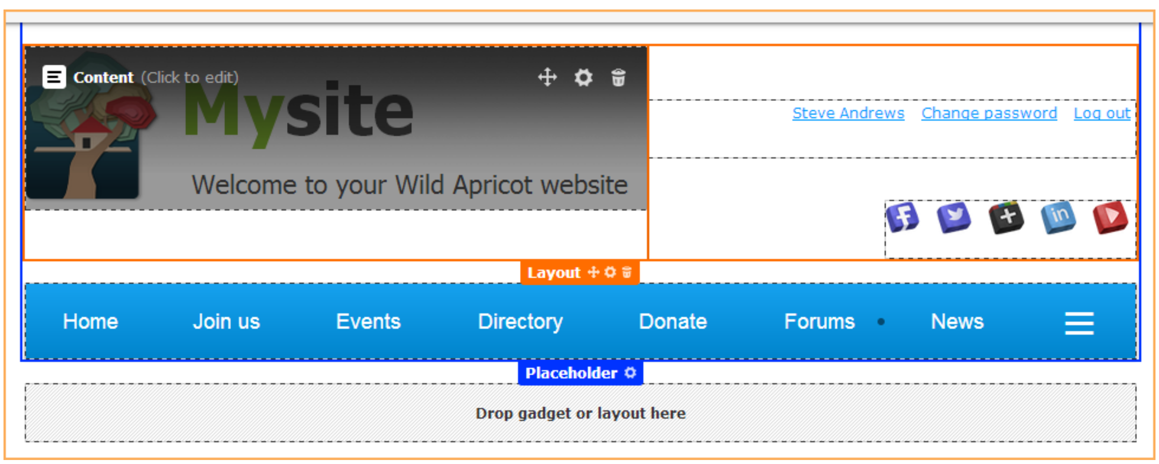
Tutorial: Applying branding to your site

You're setting up your Wild Apricot site, and you need it to reflect and adhere to your organization's branding guidelines, whether that involves logos, fonts, or colors. To applying your organization's branding to your Wild Apricot site, follow these steps.

1. You might want to begin by switching to a website theme that's closer to your organization's color scheme, or to one of the newer themes – like Treehouse, Clean Lines, White Space, or Dark Impact themes – that provide greater control over background colors and images.
2. Next, you should modify the headers and footers for your site pages. Headers and footers are defined as part of your page templates. Depending on your site, you could have multiple page templates for different kinds of pages. To modify a page template, click the **Page templates** option under the **Website** menu.
3. Select the page template you want to modify, then click the **Edit** button.



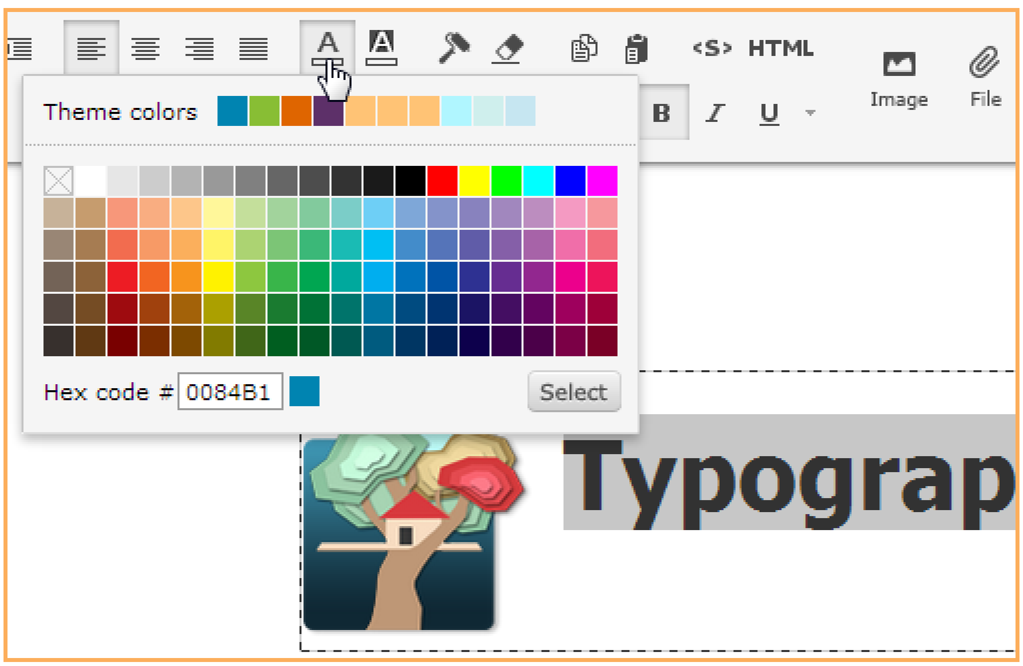
4. The page header is simply the elements that appear at the top of the page template and thereby, the top of each page that is based on it. Elements are inserted as gadgets into layouts which have been added to placeholders.



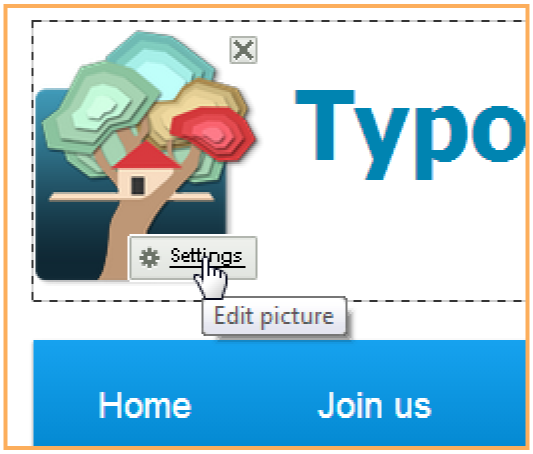
You can add new layouts to the page template, and insert additional gadgets. You can remove gadgets by hovering over them and clicking the Trash icon...

...or you can drag them outside a layout, or to a new layout.

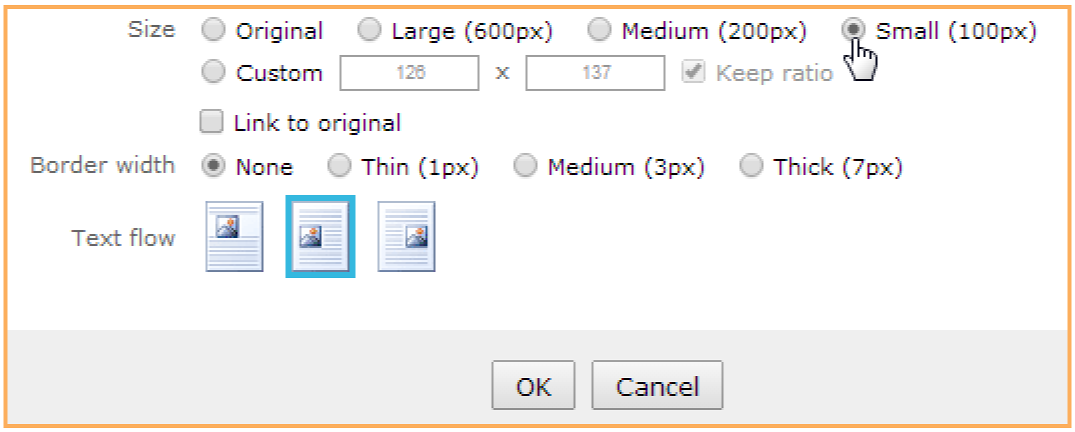
5. Within the content gadget where the logo, site name, and tag line appear, you can overwrite the existing text, format text using text styles or local formatting.



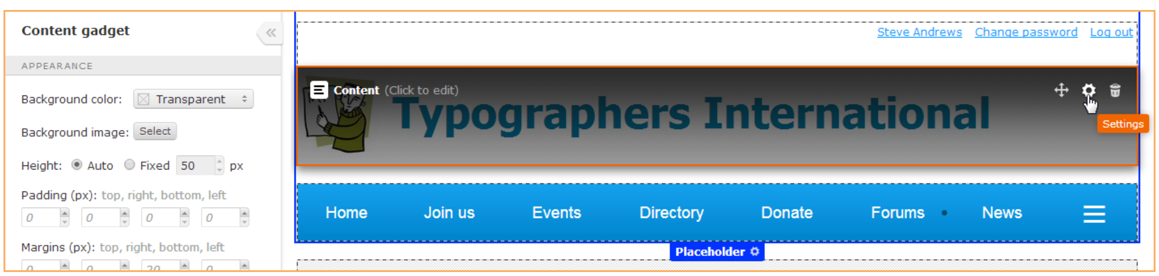
6. You can replace the logo image by hovering over the image and clicking the **Settings** icon.



7. While inserting the new logo, you can control its size, and whether it wraps around any text within the content gadget.



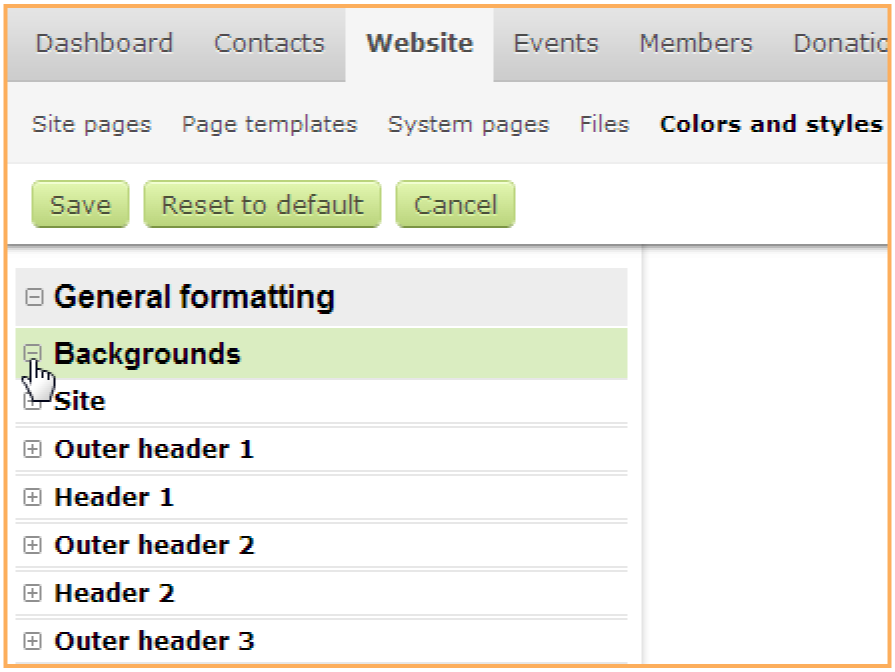
8. For each content gadget and layout, you can set a background color or image, and adjust other settings.



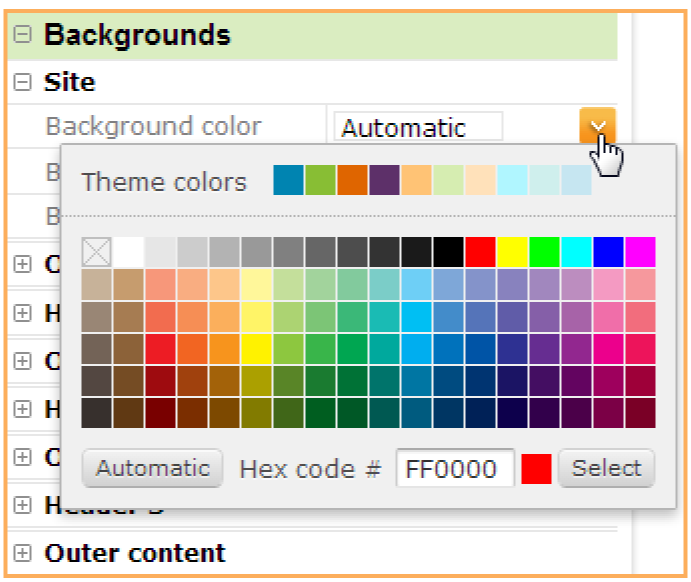
9. You can take a similar approach to customize the footer area to match your organization's branding guidelines. You could, for example, add contact information, copyright information, social sharing buttons, or a links to your privacy policy, terms of use, and sitemap.

10. Once you've finished customizing your headers and footers, you can set a background color or background image for your site. Under the **Website** menu, select **Colors and styles**.
11. For Treehouse, Clean Lines, White Space, and Dark Impact themes, expand the **Backgrounds** section. For all other themes, expand

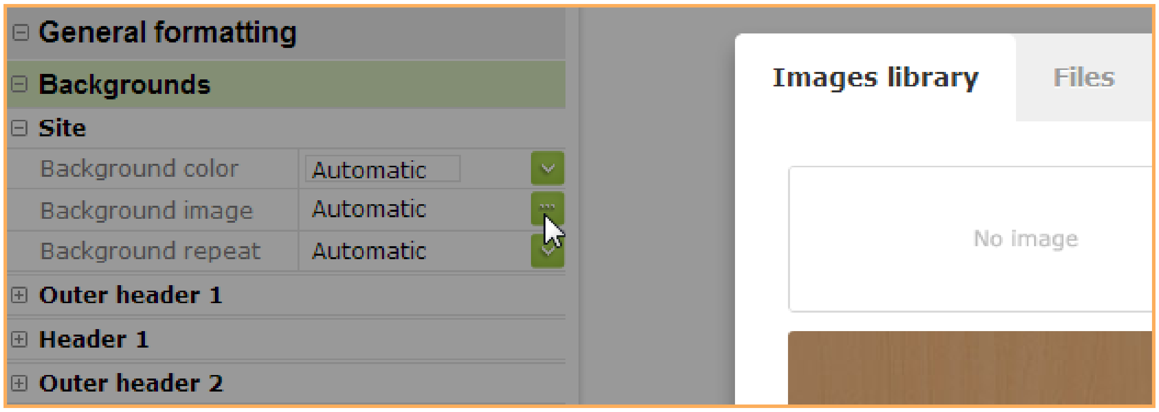
the **Site** section.



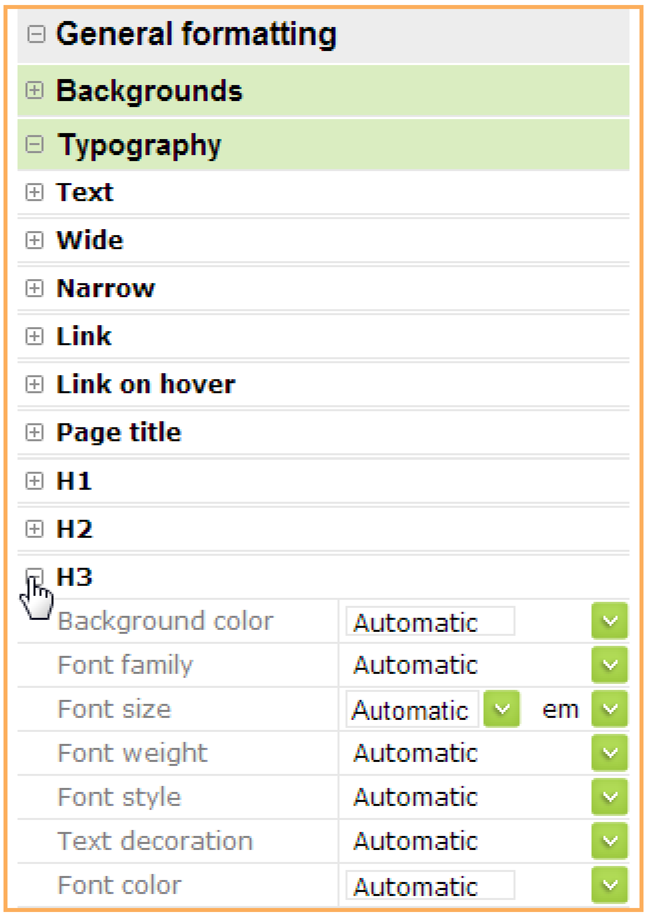
12. For Business Casual and Granite themes, expand the **Content** subsection. For Treehouse, Clean Lines, White Space, and Dark Impact themes, expand the section where you want to set the background image or color. For example, you might want to set or change the background for the entire site or just for the outer header.
13. To set a background color, click the down arrow to the right of the **Background color** option. From the color palette that appears, you can select a color or enter the hexadecimal code for the color (e.g. *#FF0000* for red). Colors that are used in or compatible with the current theme appear along the top of the palette.



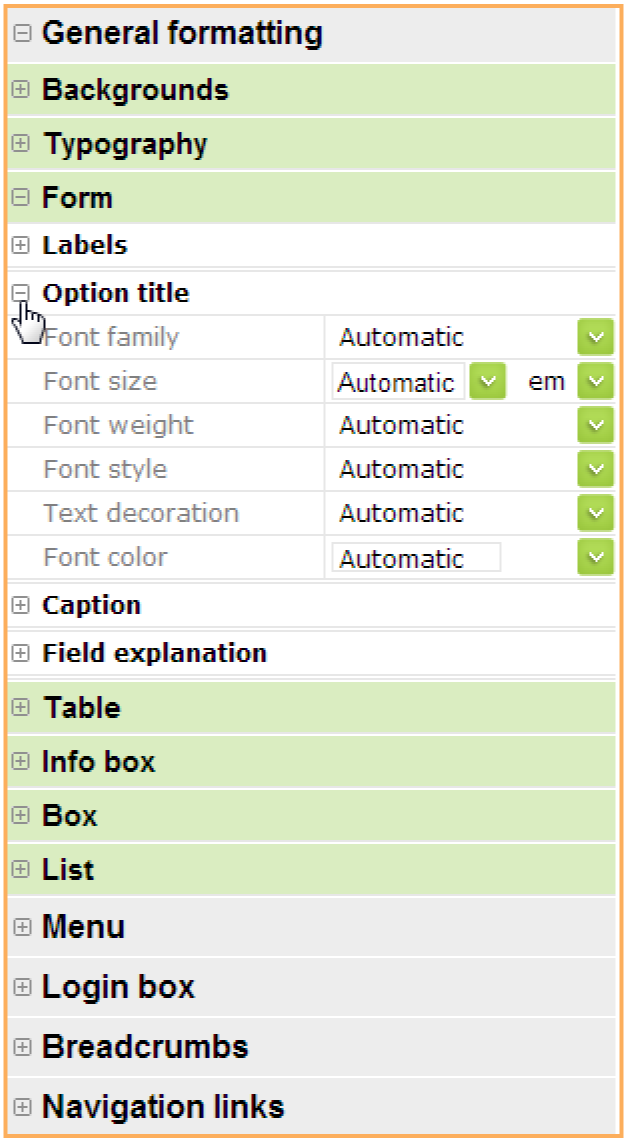
14. To set a background image, click the ellipsis button (...) to the right of the **Background image** option and choose an image from the theme-specific image library or one from your Wild Apricot account.



15. From the Colors and styles screen, you can also change the colors and fonts of elements that appear throughout your site. To change text styles – the predefined text options that appear within a dropdown on the content editor toolbar – find and expand the **Typography** s ection, Within this section, you can change the fonts and colors of headings, links, and paragraph text.



16. Other elements, such as menus, forms, tables, and login boxes can also be customized in the same way.



17. For more advanced site customization, you can explore using CSS and applying theme overrides.

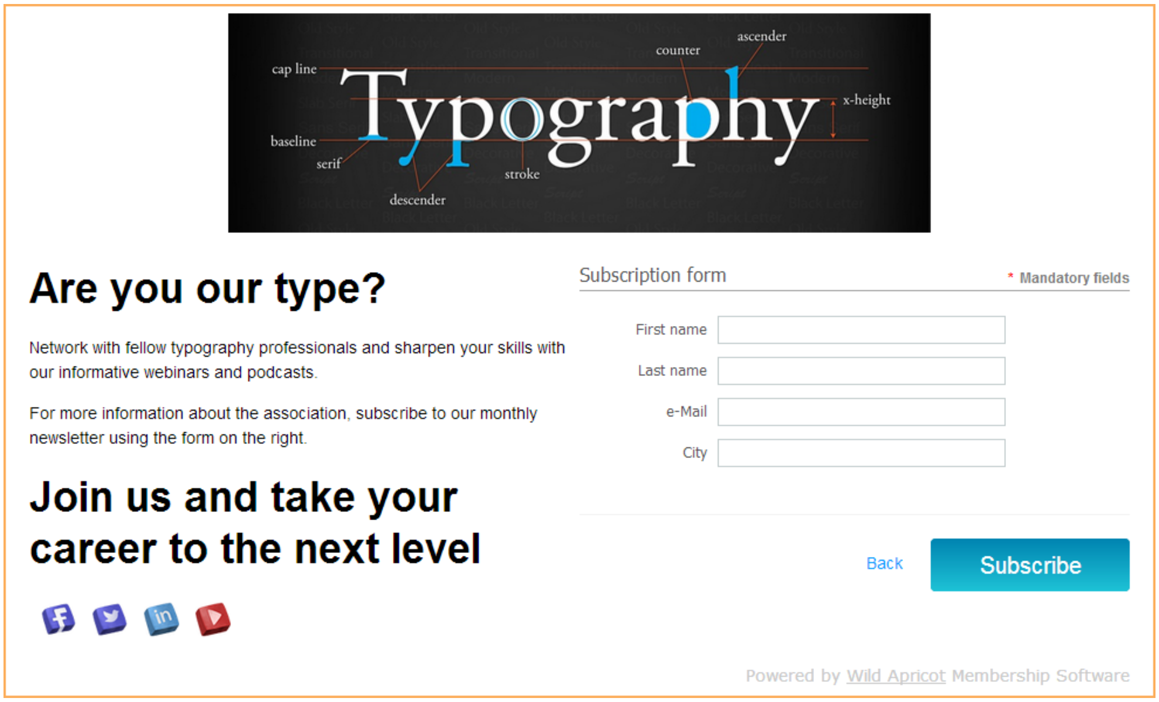
Tutorial: Creating a landing page

Tutorial: Creating a landing page

A landing page is a website page that appears in response to an online advertisement or search engine result, and is intended to spark interest in a site. A landing page typically includes a form to add the visitor to the site's mailing list. In this tutorial, we'll set up the following landing page.

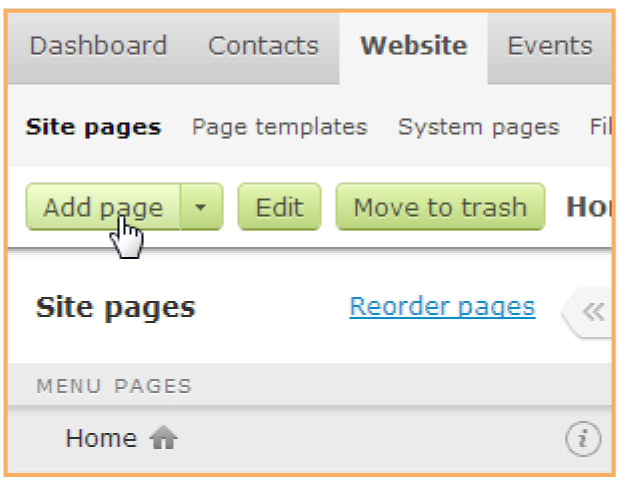
See also:

- Starting page for members

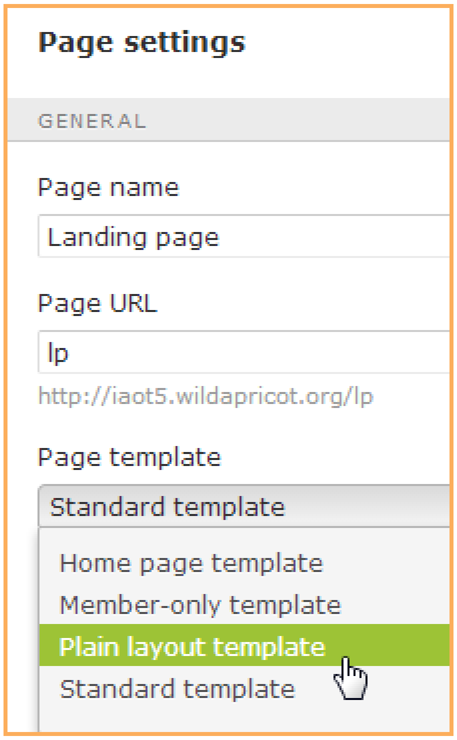


Creating this landing page involves the following steps.

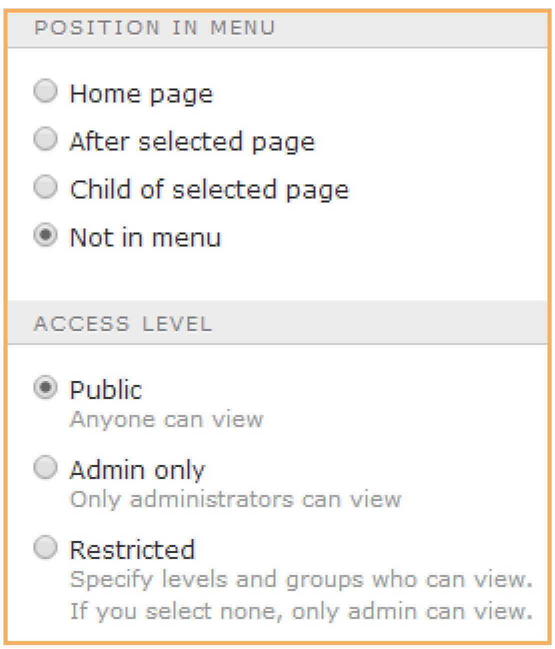
1. Jump to the Site pages screen by clicking **Site pages** under the **Website** menu.
2. From the Sites page screen, click the **Add page** button to create a new site page.



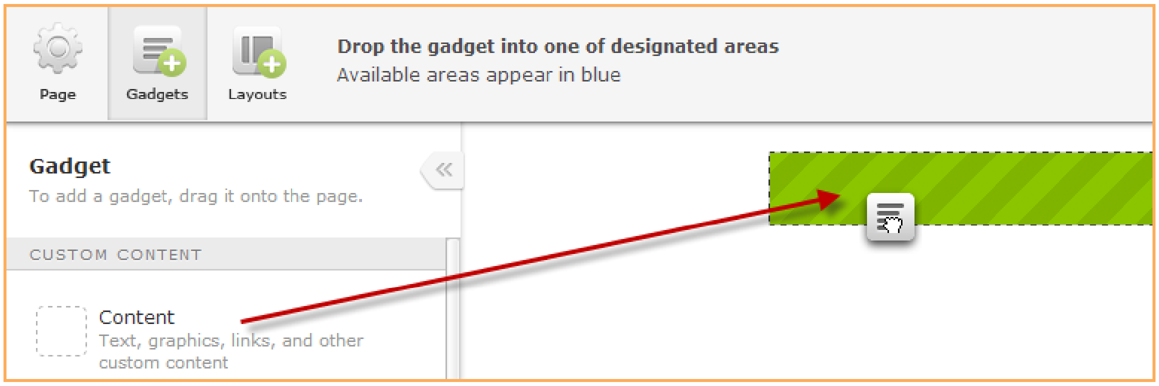
3. Within the page settings on the left, enter a name for the new page and an easy to remember page URL.
4. Click the **Page template** dropdown and select **Plain layout template**. This is a special template with a simple layout, and without headers or footers.



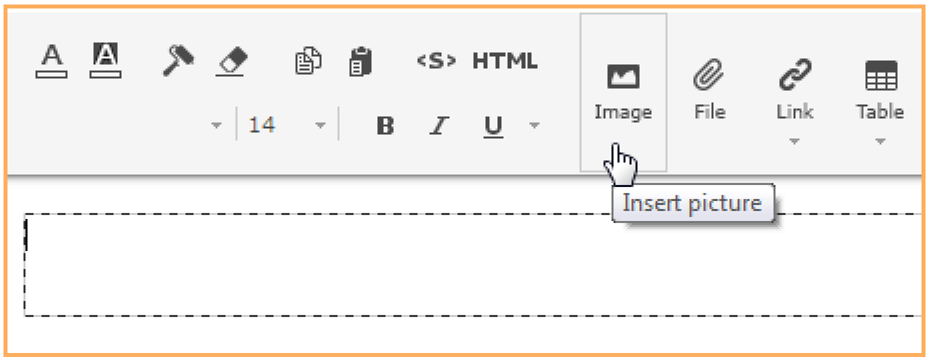
5. Under **Position in menu**, click the **Not in menu** option, so the page doesn't show up in the site menu.
6. Under **Access level**, click **Public**, so anyone can view it.



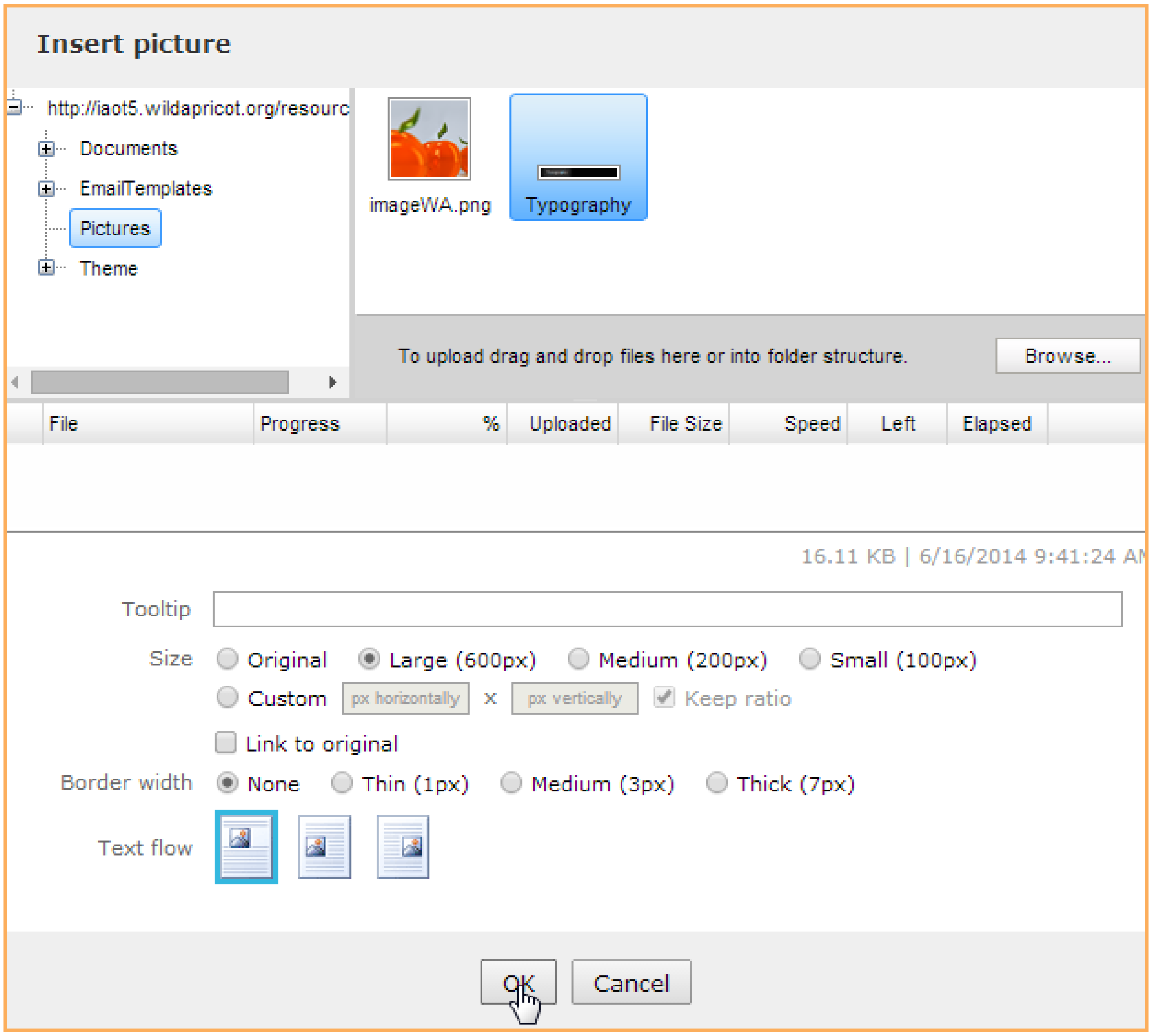
7. With the page settings taken care of, we can begin designing the landing page itself. First, we'll add a content gadget to the page. Click the **Gadgets** icon above the page settings to view the list of available gadgets.
8. Drag a content gadget onto the placeholder marked **Drop gadget or layout here**. Within this gadget, we'll add a banner with our organization's logo.



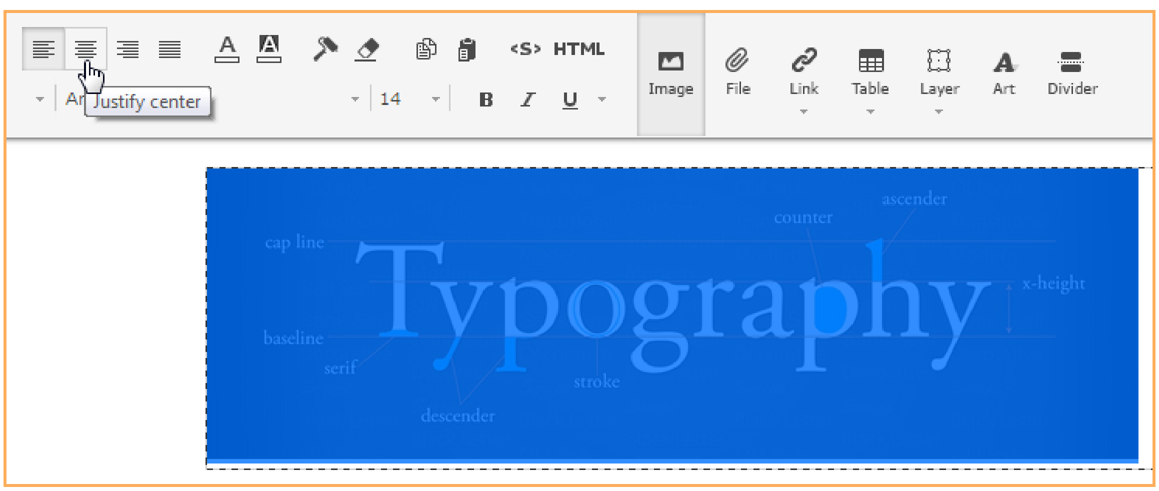
9. Click within the gadget you just added, then click the **Image** icon within the content editor toolbar at the top.



10. Click the **Browse** button and select the graphic containing your organization's banner.
11. After the file has uploaded, click it within the file pane in the top right.
12. Within the image properties at the bottom, set the **Size** to **Large** then click **OK**.

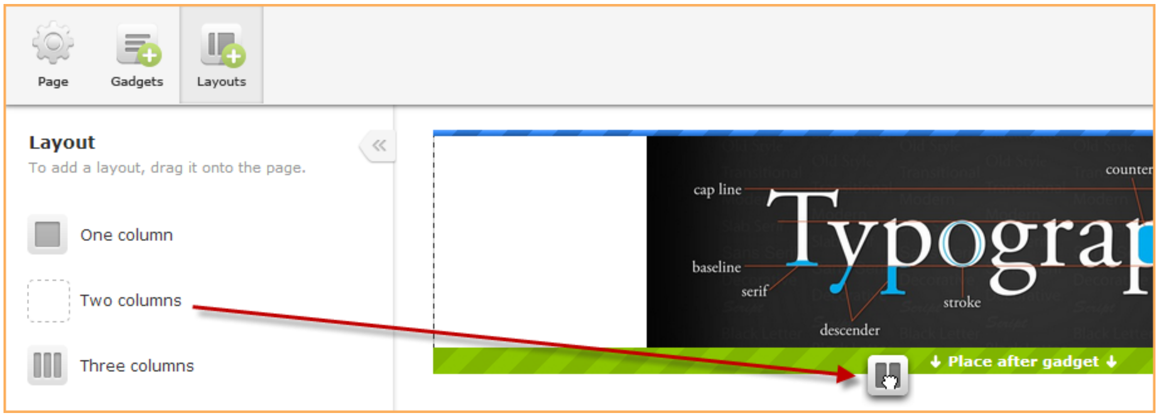


13. The banner should now appear within the content gadget on the page. With the image still selected, click the **Justify center** icon within the toolbar to center the image.

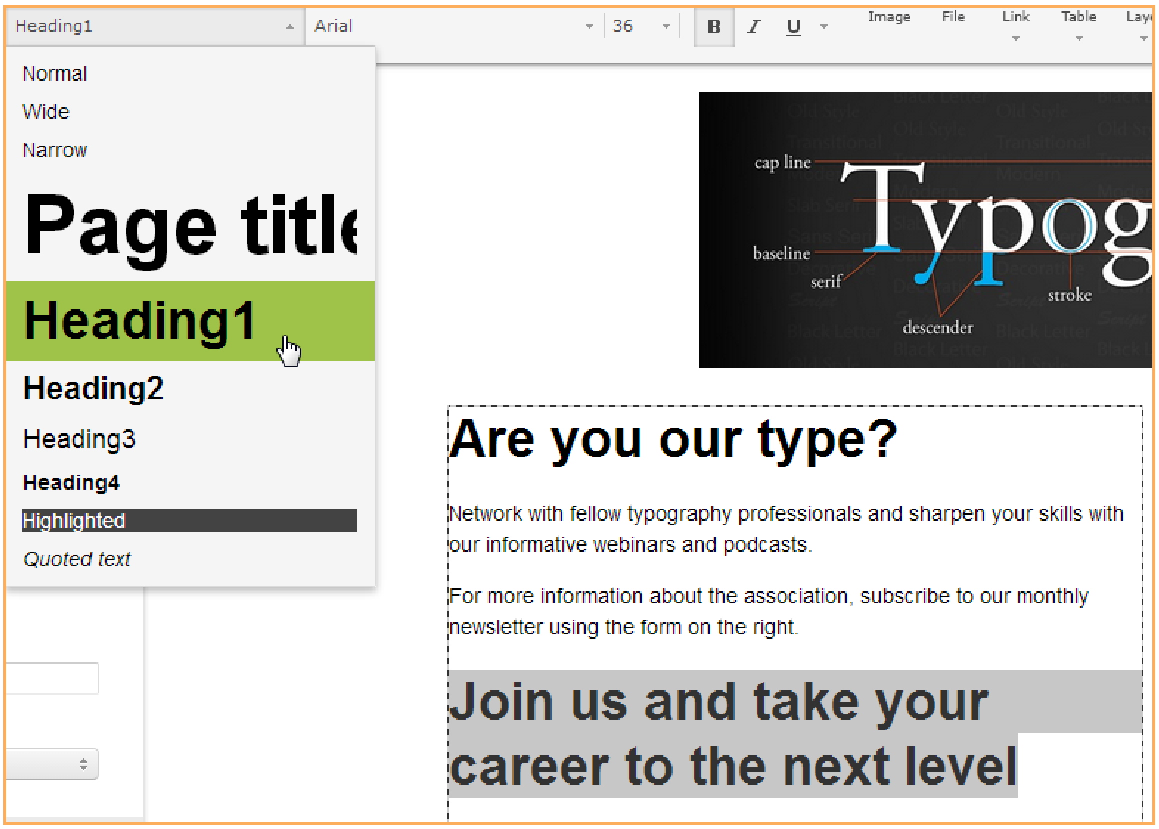


Below the banner, we're going to add some marketing copy and an email subscription form. We'll place them side by side within a 2-column layout.

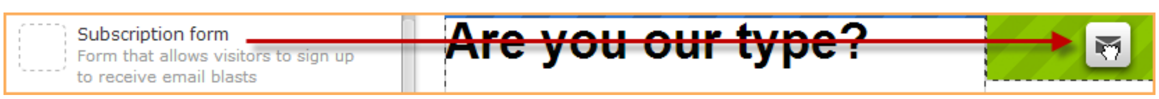
14. Click the **Layouts** icon towards the top left corner of the screen to view the available layouts.
15. Drag a two-column layout onto the page below the content gadget containing the banner.



16. Now, display the Gadgets list again and drag a content gadget into the first column.
17. Click within the content gadget you just added and starting typing your marketing copy. You can use the icons on the content editor toolbar to format the text.

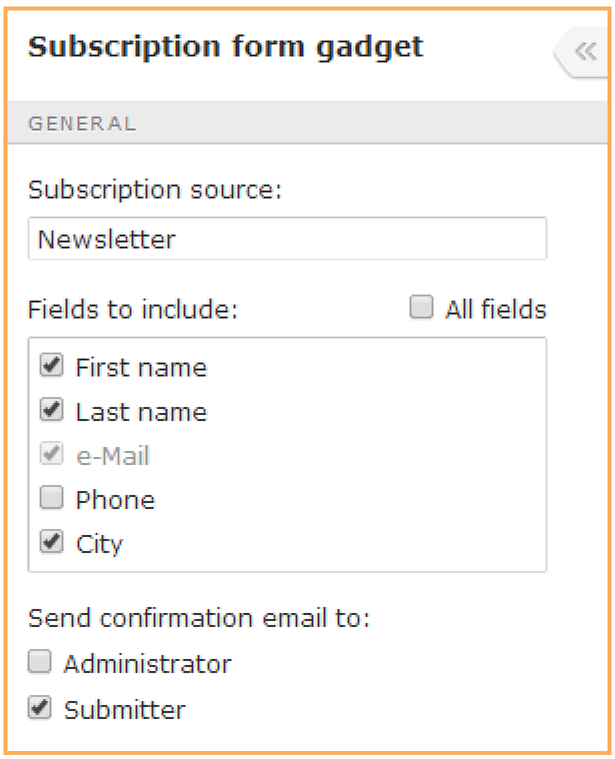


18. In the second column, drag and drop a subscription form gadget.



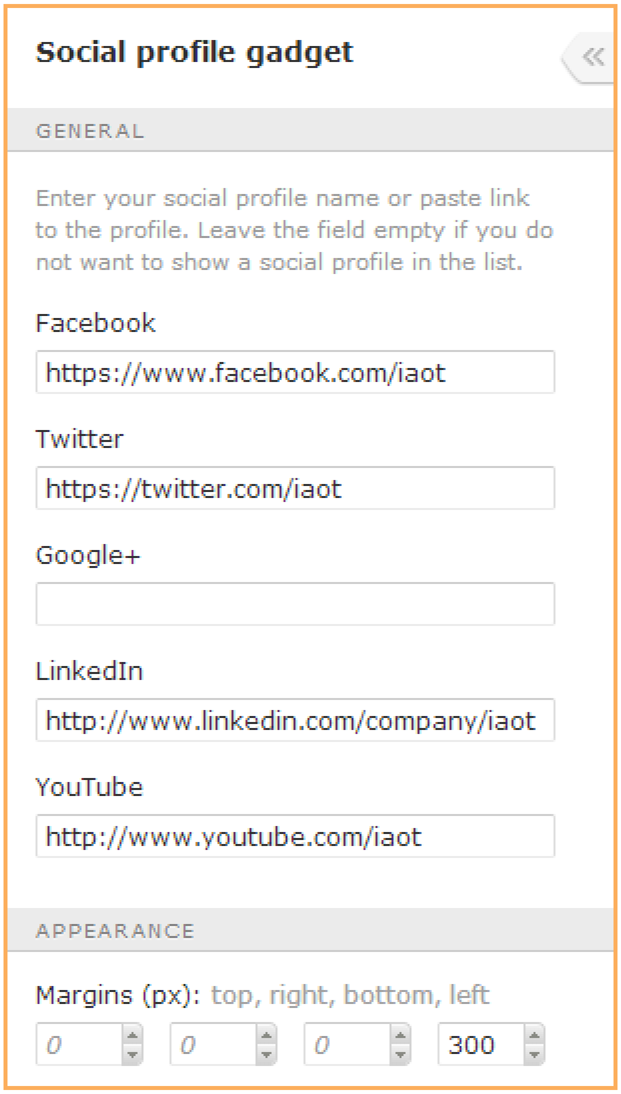
19. Hover over the subscription form gadget you just asked and click the **Settings** icon to display the settings for the gadget.

20. In the **Subscription source** field, enter a name for the particular subscription the visitor is signing up for. You will use the subscription source when you assemble the recipient list for your email blast.
21. Within the gadget settings, you can also choose which common fields you want to include in the signup form, and who want confirmation emails to go to.



22. So that visitors to this page can follow you on social networks, add a social profile gadget below the subscription form layout.

23. Within the settings for the social profile gadget you just added, adjust the locations of your social network profiles, and leave blank any networks you don't want to appear as icons within the gadget. To adjust the positioning of the icons, use the **Margins** settings.

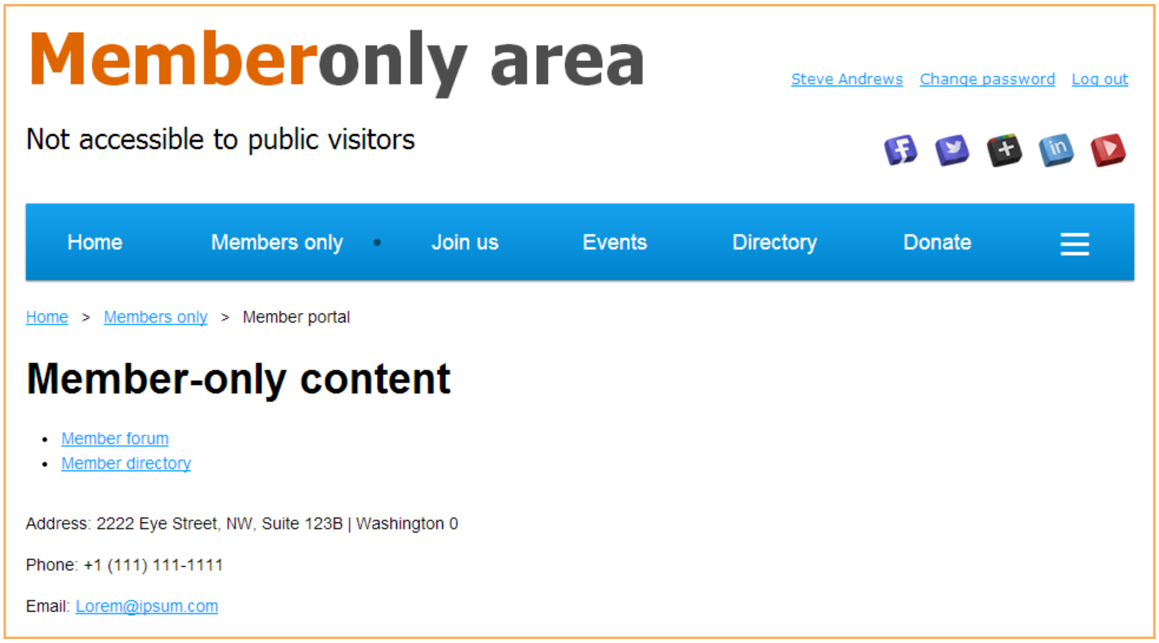


24. Finally, click the **Save** button to save your landing page.

Tutorial: Setting up a member-only portal

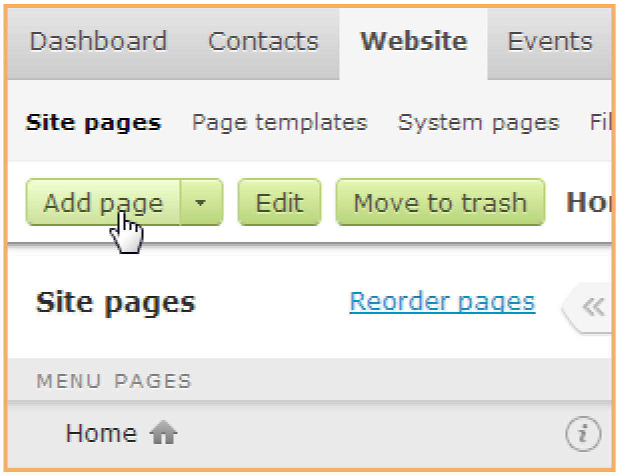
Tutorial: Setting up a member-only portal

A member-only portal is a single web page that acts as a gateway to a collection of member-only pages. The portal displays links to the member-only pages, and prompts members to log in so they can view the member-only content.

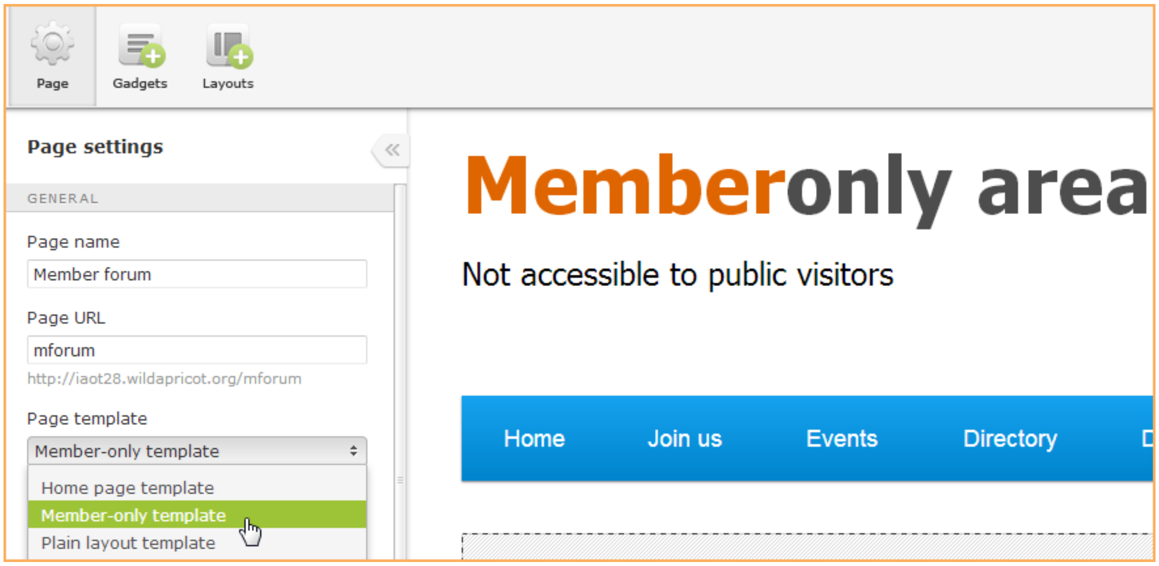


Creating a member-only portal involves the following steps.

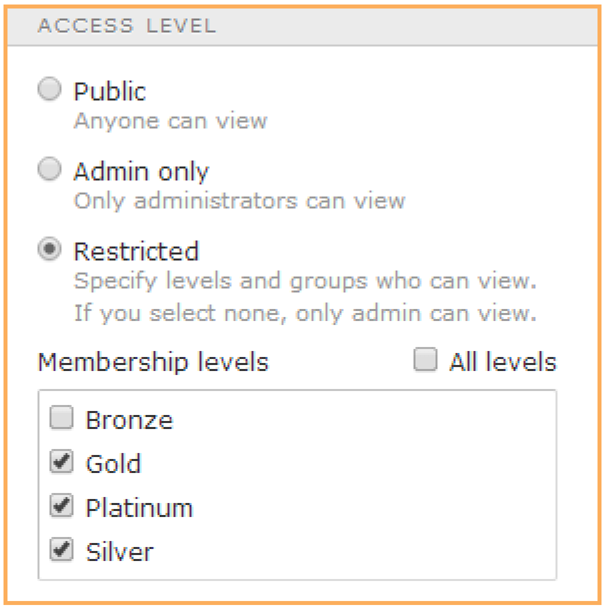
1. Jump to the Site pages screen by clicking **Site pages** under the **Website** menu.
2. From the Site pages screen, click the **Add page** button to create one of the member-only pages.



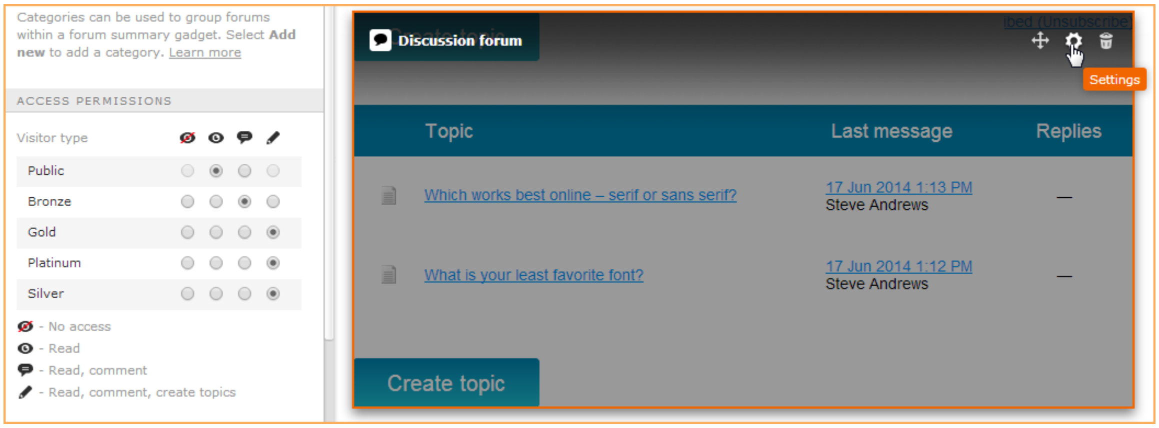
3. Within the page settings on the left, enter a name for the new page and an easy to remember page URL.
4. Click the **Page template** dropdown and select **Member-only template**. (If you don't have a separate member-only template, you can create one.)



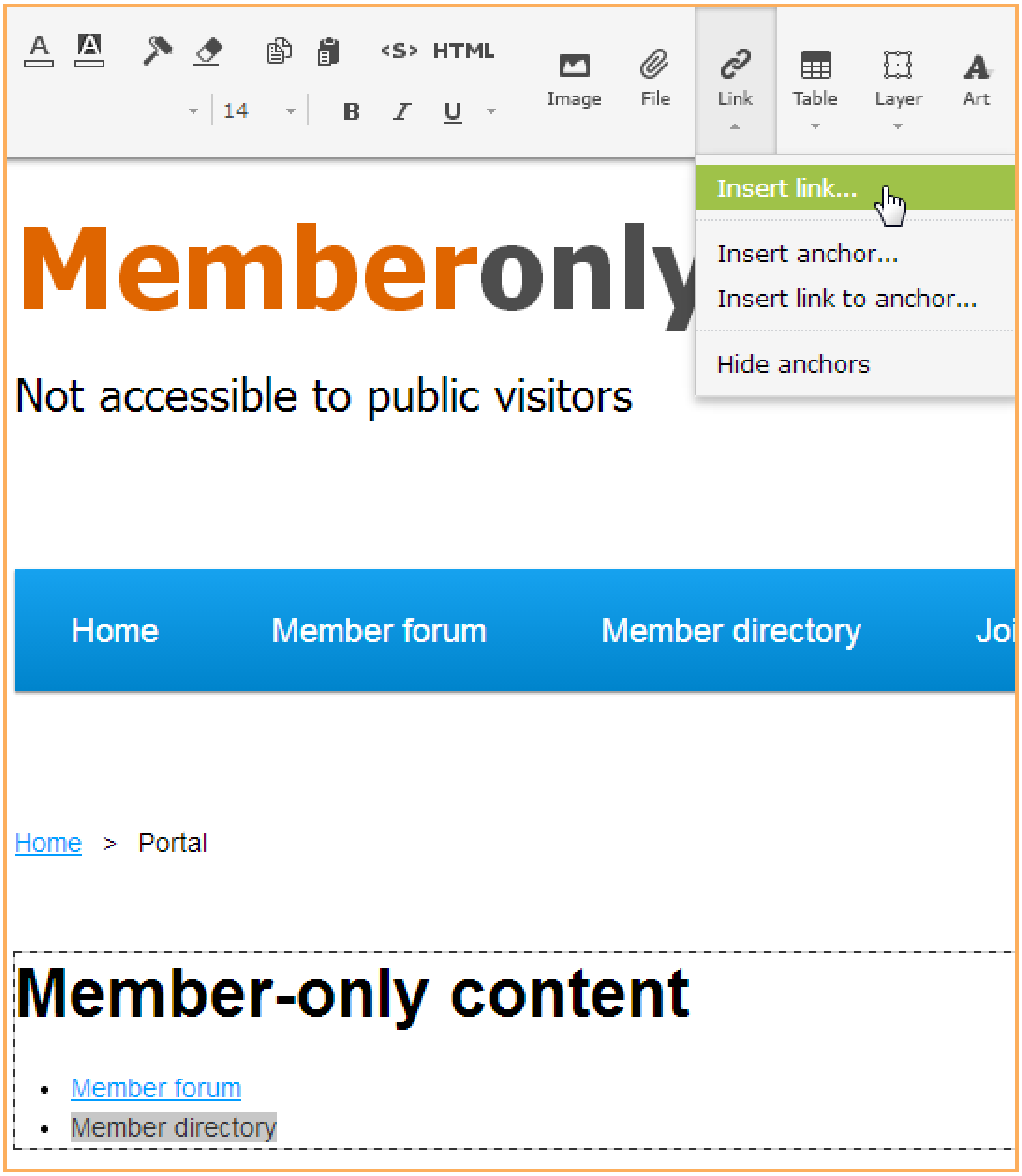
5. Under **Access level**, click **Restricted**, then choose the membership levels you want to be able to access the portal.



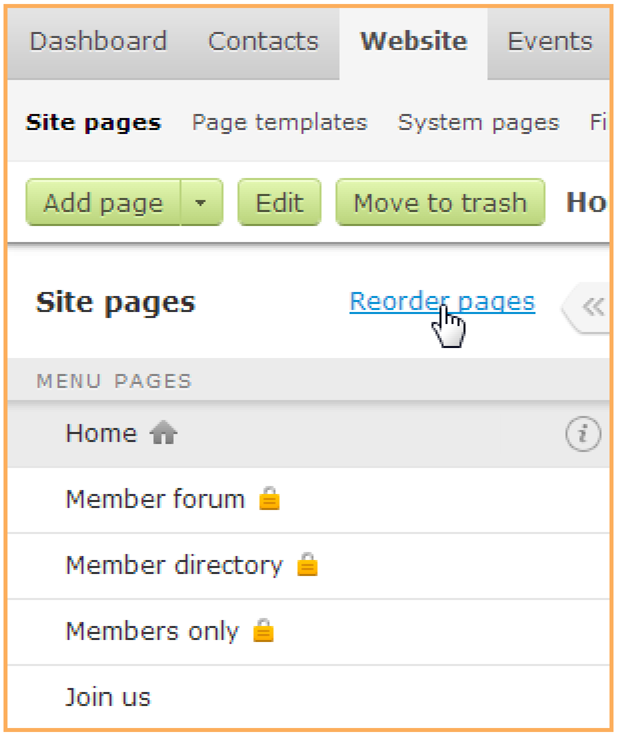
6. Add content to the page. You could, for example, add a member-only discussion forum, or a member directory that is restricted to members only.



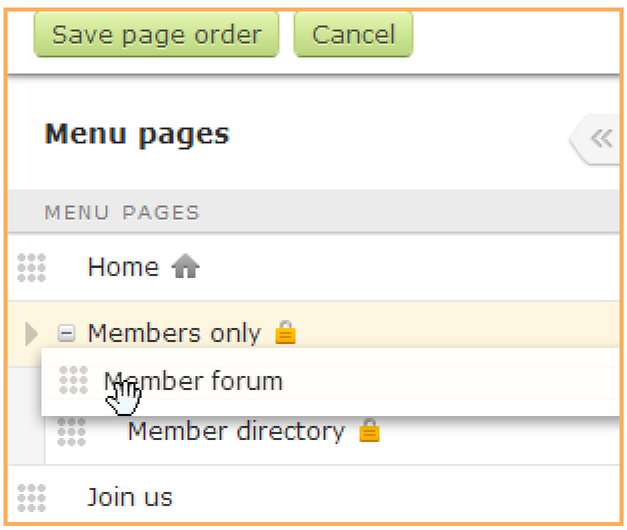
7. Click the **Save** button to save the new page.
8. Create the additional member-only pages, using the same template and the same access restrictions.
9. Now, its time to create the main portal page, the one that provides links to all the other member-only pages. Use the same template and the same access restrictions as the other pages you created.
10. Within the portal page, add a content gadget and insert links to the member-only pages.



11. After you've saved changes to the portal page, you can group the member-only pages under it so that they appear as submenu options to logged in members. From the Site pages screen, click the **Reorder pages** link.

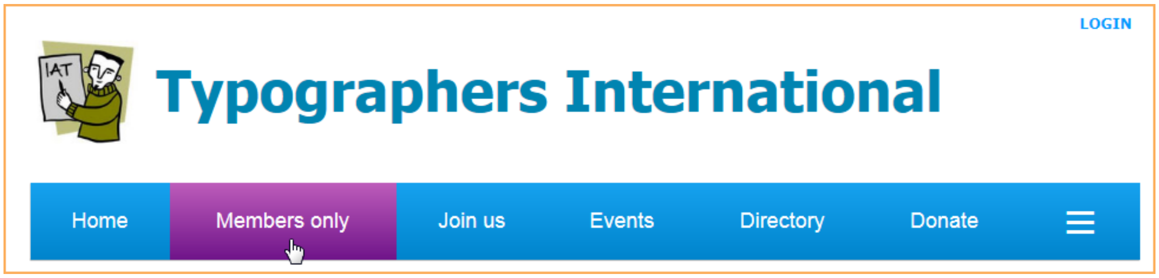


12. Now, drag and drop the member-only pages under the main portal page, then click **Save page order**.



13. Now, you need to provide access to the member portal page, so that members and others know it exists without being logged in first. You could add a text link to the page to one or more page templates...

...or if you want the portal to appear in your site even to non-members, you could create a publicly accessible page that redirects to the member portal page.



In the latter case, you might want to group the portal page under the page being redirected.

Integrating with other sites or applications

Integrating with other sites or applications

There are a number of ways that you can integrate your Wild Apricot site with other sites or applications.

- install the Wild Apricot Login plugin on WordPress to provide a single sign-on screen and the ability to restrict WordPress content to Wild Apricot members
- use Wild Apricot's API to create apps and other programs that retrieve or update data stored in your Wild Apricot database
- use Wild Apricot's single sign-on service to create a program that provides integration with another website
- use Wild Apricot widgets to add Wild Apricot functionality to other websites

For more information on these integration options, click the links above.

See also:

- Open source Wild Apricot authentication plugin for Discourse
- Open source Wild Apricot authentication plugin for Joomla

Authorizing external applications

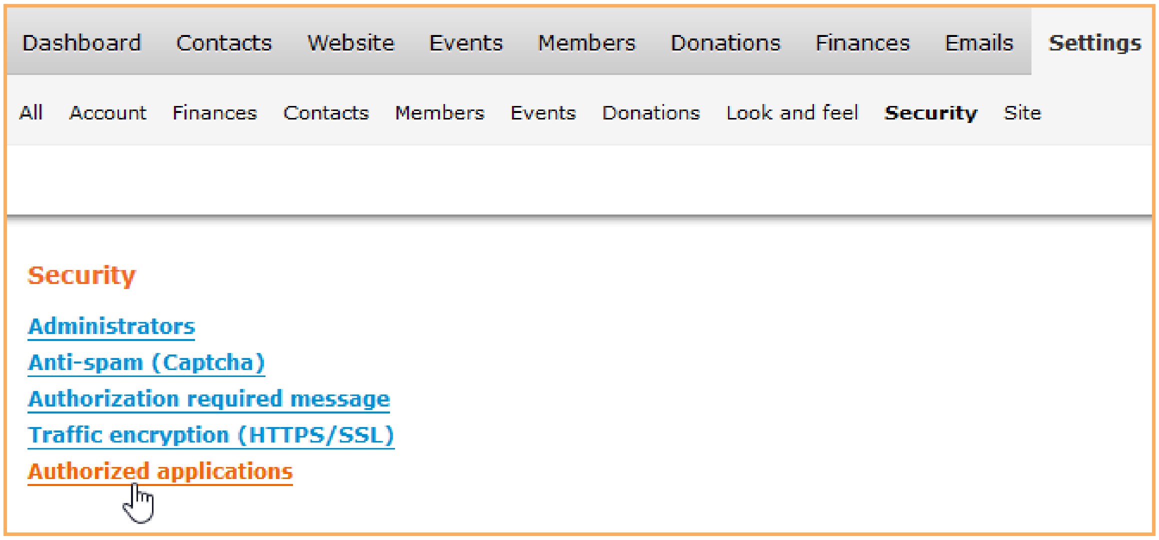
Authorizing external applications

For an external application to access or update Wild Apricot account information – via Wild Apricot's API – it must first be authorized within Wild Apricot. During authorization, the application will be assigned a unique API key. If the application provides account access to individual users (via a mobile app, for example), the application can be assigned a client ID and a client secret as well. Applications can use the application API key or client credentials for authentication when accessing the API.

Authorizing an application

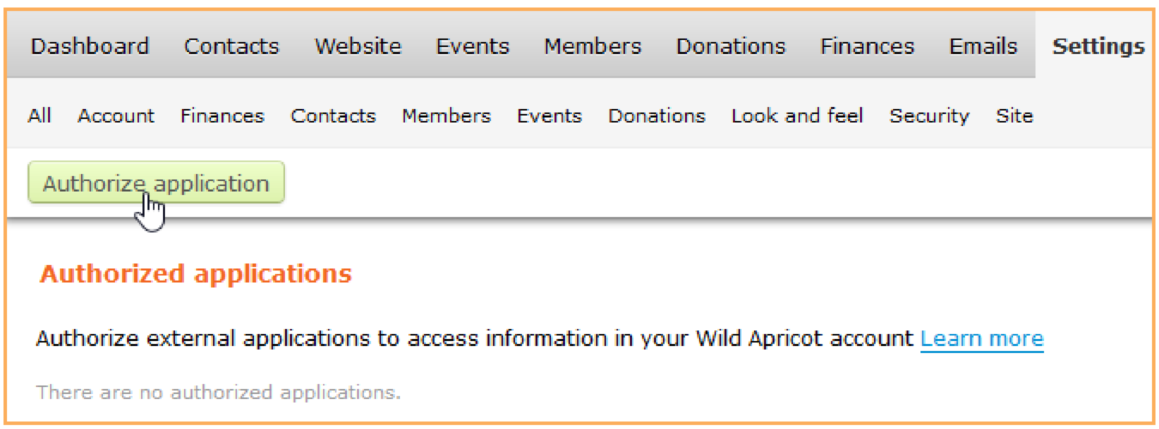
To authorize external applications to access your Wild Apricot account, follow these steps:

1. Hover over the **Settings** menu and select the **Security** option. Within the Security settings screen, select the **Authorized applications** option.



To authorize an application, you must access your Wild Apricot account in secure mode – using *https* rather than *http*. If you select this option in insecure mode, you will be prompted to switch to secure mode.

2. On the Authorized applications screen, click the **Authorize application** button.



3. Choose from the following application types then click **Continue**:

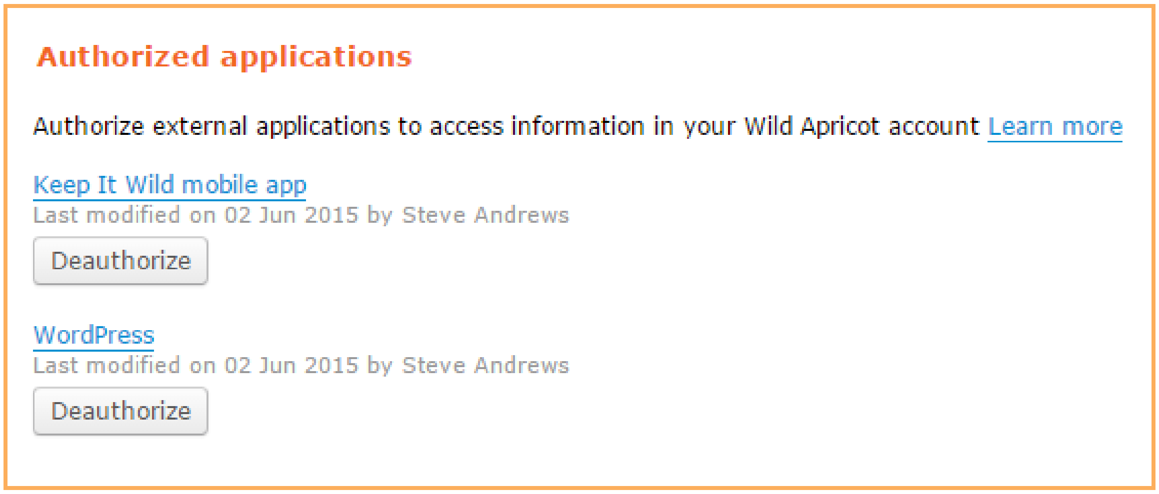
Type	Description
Server application	A server-side application that requires data from your Wild Apricot account.
User authorization	A client application that requires authorization of individual Wild Apricot users (e.g. a mobile app).
WordPress	A WordPress site you want to integrate with your Wild Apricot site. For more information, see Integrating with WordPress.

4. On the Application details screen, the following options and information are available:

Field	Description
Application name	The name used to identify this application within the list of authorized applications.

API key	The API key for this application. You can use this value to authenticate the application when accessing Wild Apricot's API. If there is no API key displayed, click the **Generate API key** bu tton. To delete an API key, click the red X beside the key. You can control whether the application has read-only access, full access, or just access to functions required by WordPress. If you choose the read-only option – and authenticate your application using the API key – then the application can only access functional areas (called scopes) that do not update data.
Application credentials for user authorization	The client ID and client secret for this application. You will need this value if the application requests authentication using Wild Apricot user credentials. If there is no **Client secret** value displayed, click the **Generate client secret** button. To delete the client secret, click the red X beside the value.
Authorize users via Wild Apricot single sign-on service	Check this option if you want Wild Apricot users to sign into the application and their Wild Apricot account from a single sign-on screen. If you disable this option, the application can still access data in your Wild Apricot account, but users will not be logged in their Wild Apricot accounts within their browser.
Organization name	If you enable the single sign-on service, you can specify the organization name displayed at the top of the single sign-on screen.
Introductory text	If you enable the single sign-on service, you can specify the description that appears below the organization name on the single sign-on screen.
Allow login via social networks	If you enable the single sign-on service, you can allow users to log in using their Facebook or Google+ credentials . If you enable this option, then **Log in with Facebook** and **Log in with Google+** buttons will appear on the single sign-on screen.
Trusted redirect domains	For WordPress integration, enter the full URL of your WordPress site (e.g. http://aaot.wordpress.com). For other single sign-on scenarios, enter the URL to which the user will be redirected after login.

5. Once you have completed entering or copying the required information, click the **Save** button to save your changes. The application should now appear within the list of authorized applications.



Deauthorizing an application

Once an application has been authorized, you can deauthorize it by clicking the **Deauthorize** button below the application within the authorized applications list.

On this page:

- Authorizing an application
- Deauthorizing an application

See also:

- API V2 authentication
- Integrating with WordPress
- Single sign-on service

Integrating with WordPress

Integrating with WordPress

You can add member-only content from your Wild Apricot site into your WordPress site, and provide a single logon that authenticates Wild Apricot members and logs them into both their Wild Apricot and WordPress accounts .

Using the Wild Apricot Login plugin for WordPress, you can also restrict content on your WordPress site to your Wild Apricot members, in addition to providing access to restricted Wild Apricot content such as member directories and member-only events. Any restricted Wild Apricot content – embedded using Wild Apricot widgets – can be accessed without further authentication.

WordPress plugins are only available for WordPress.org users, and not for WordPress.com users.

You can display a login button for single sign-on by adding a WordPress widget – installed along with the Wild Apricot Login plugin – to the header in your WordPress theme layout, or by inserting a shortcode in your WordPress page content. A shortcode can also be added to a WordPress page to restrict WordPress content to Wild Apricot members. As well, you can use the plugin to add Wild Apricot membership levels as WordPress roles.

Wild Apricot's single sign-on service uses secure access via HTTPS. Custom domains without SSL certificates will encounter problems integrating Wild Apricot with other sites. You can either obtain an SSL certificate or set your wildapricot.org domain as your primary domain.

Integrating with WordPress at a glance

Integrating your WordPress site and Wild Apricot account involves the following steps:

1. Authorize WordPress access to your Wild Apricot account
2. Install the Wild Apricot plugin on your WordPress site
3. Add shortcodes and other Wild Apricot content to your WordPress site

These steps are described in detail below.

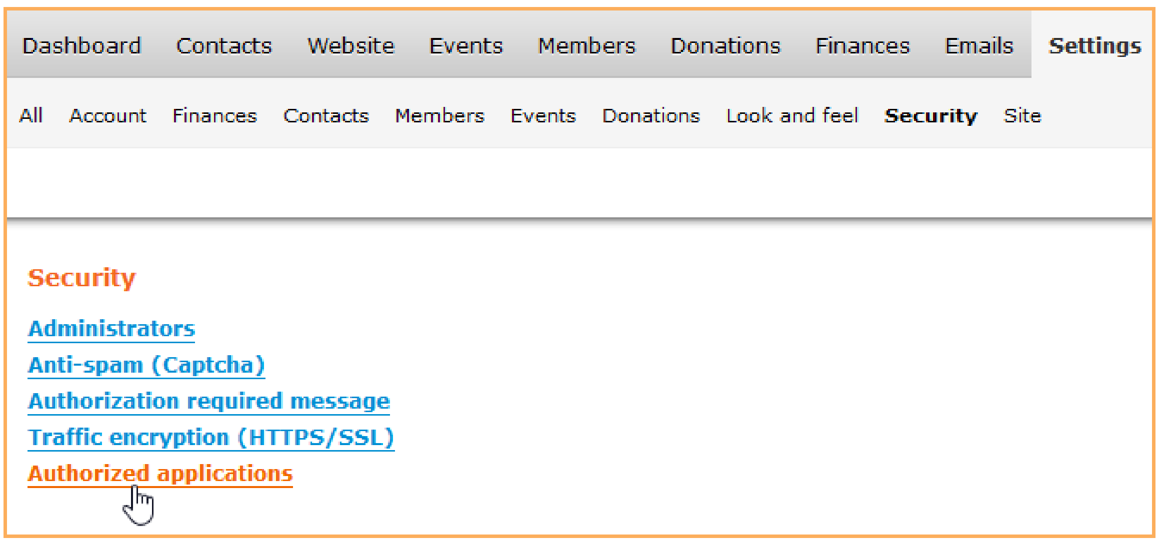
Authorizing WordPress access

The first step in integrating your WordPress site with your Wild Apricot account is authorizing WordPress to access your Wild Apricot account via Wild Apricot's API.

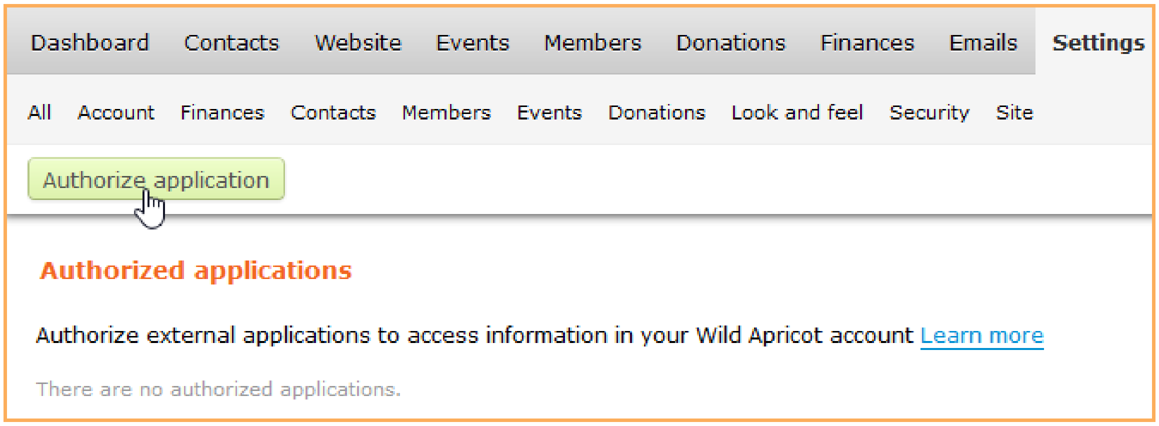
To authorize WordPress to access your Wild Apricot account, follow these steps:

Read more/less

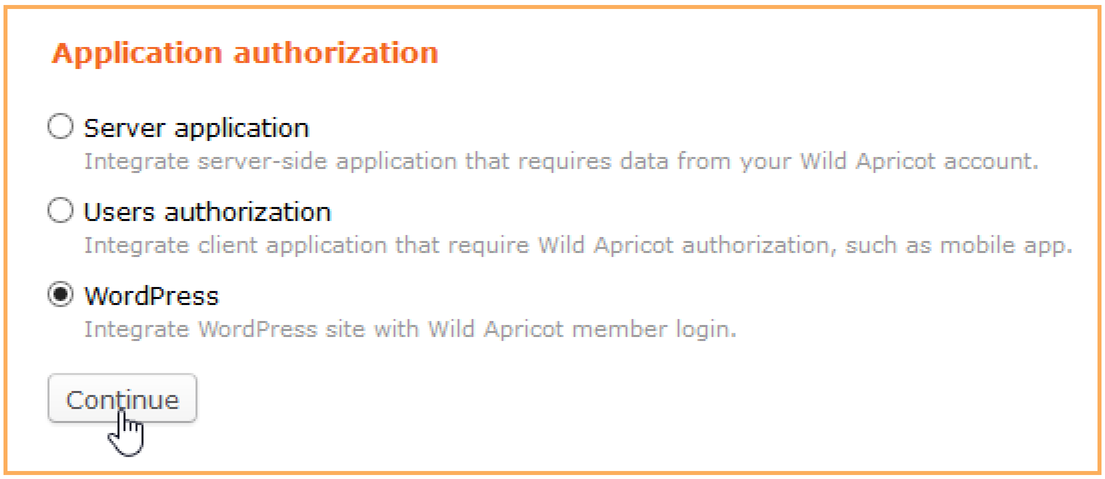
1. Hover over the **Settings** menu and select the **Security** option.
2. Within the Security settings screen, select the **Authorized applications** option.



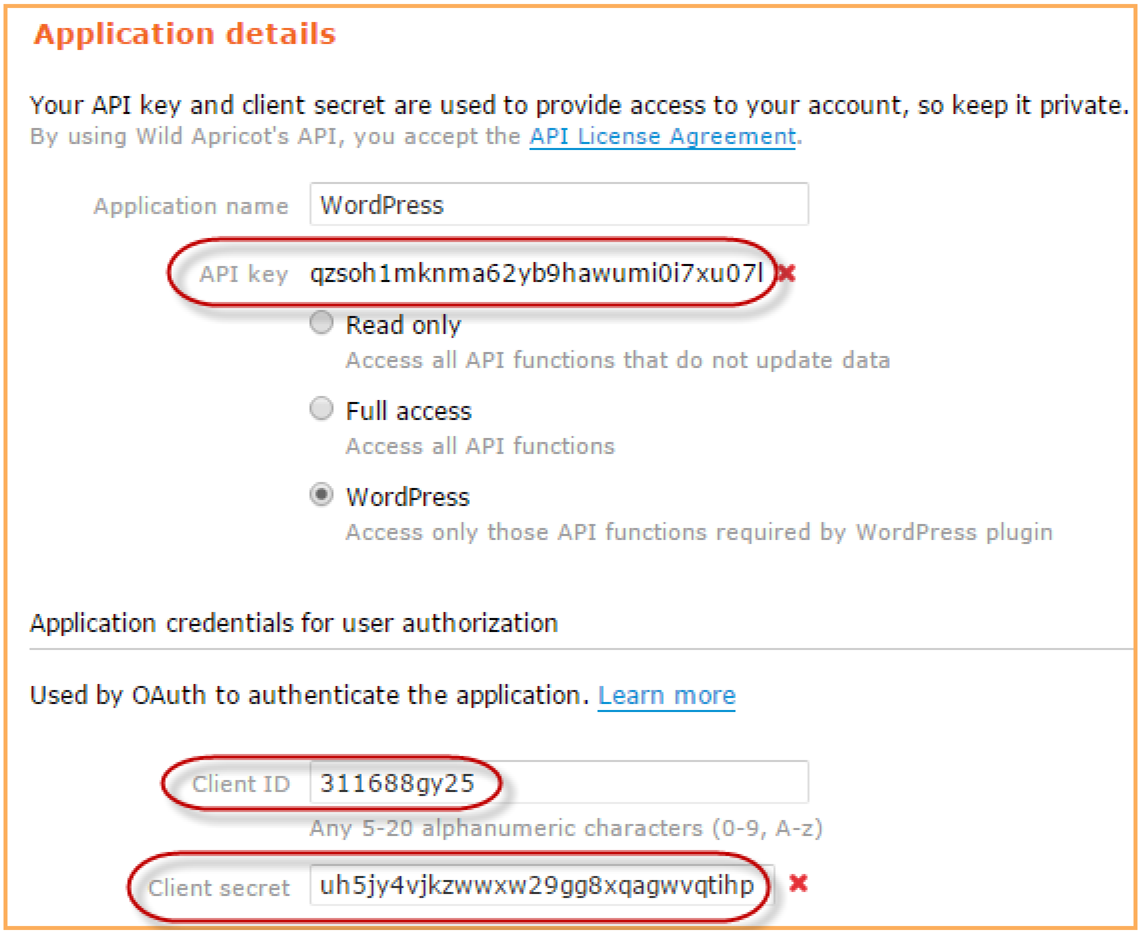
3. On the Authorized applications screen, click the **Authorize application** button.



4. Within the Application authorization screen, click the **WordPress** option then click the **Continue** button.



5. From the Application details screen, copy the API key, Client ID, and Client secret. You'll need these values when you set up the Wild Apricot plugin in WordPress.



6. Enter the organization name and introductory text to be displayed on the single sign-on screen.
7. If you want to allow members to log in using their Facebook or Google+ credentials – assuming they use the same email address for their social network and Wild Apricot accounts – check the **A llow login via social networks** option. If you enable this option, then **Log in with Facebook** and **Log in with Google+** buttons will appear on the single sign-on screen.
8. Under **Trusted redirect domains**, enter the full URL of your WordPress site (e.g. http://aaot.wordpress.com).

> ⚠ This is a required field and has nothing to do with the social login option.

9. Click the **Save** button to save your changes.

Installing the Wild Apricot plugin on WordPress

After you have authorized WordPress to access your Wild Apricot account, you need to install and set up the Wild Apricot Login plugin on WordPress.

> ⚠ Plugins are only available for WordPress.org users, and not for WordPress.com users.

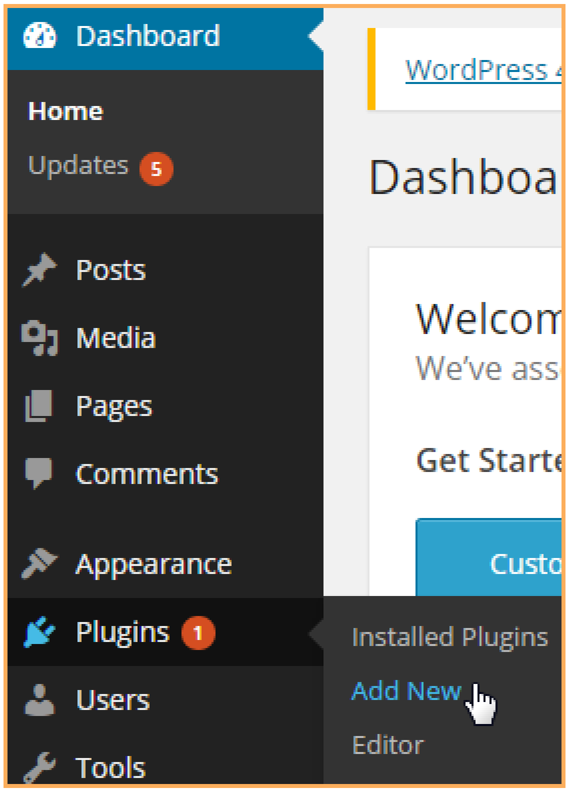
There are two ways of installing the Wild Apricot Login plugin on WordPress: automatically and manually.

Automatic installation

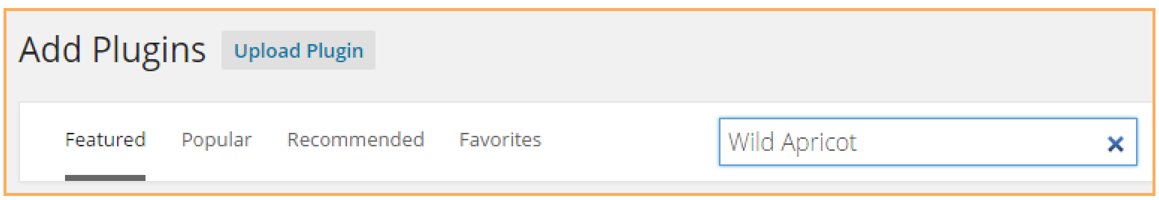
To install the plugin automatically, follow these steps:

Read more/less

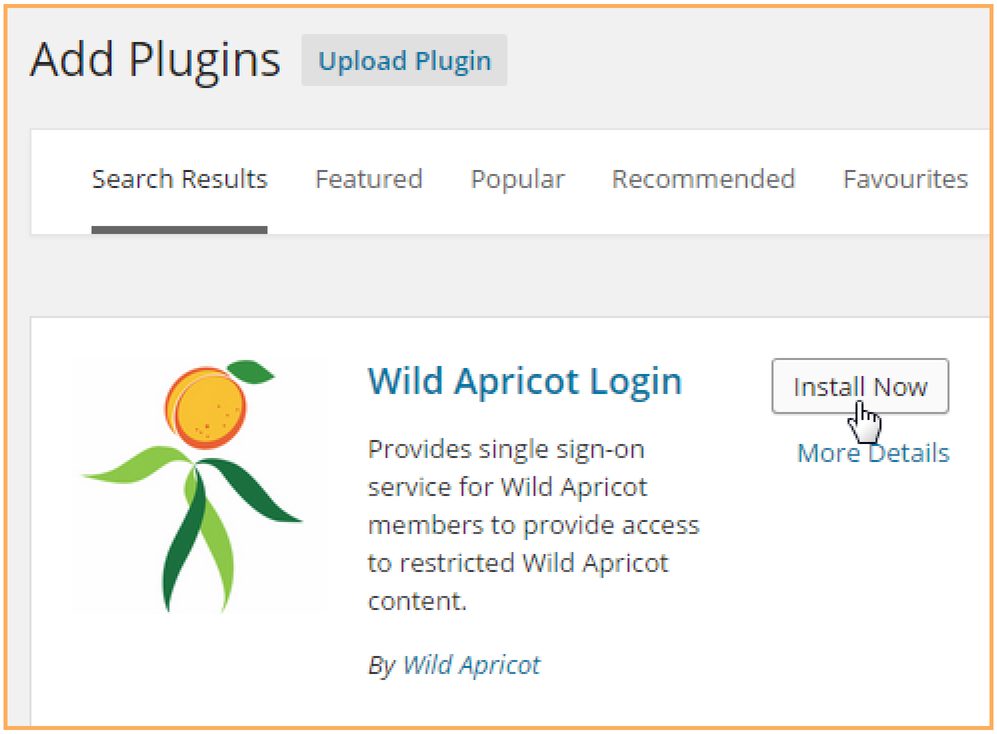
1. Log in to your WordPress site.
2. Within your Dashboard, hover over the **Plugins** menu and choose the **Add New** option.



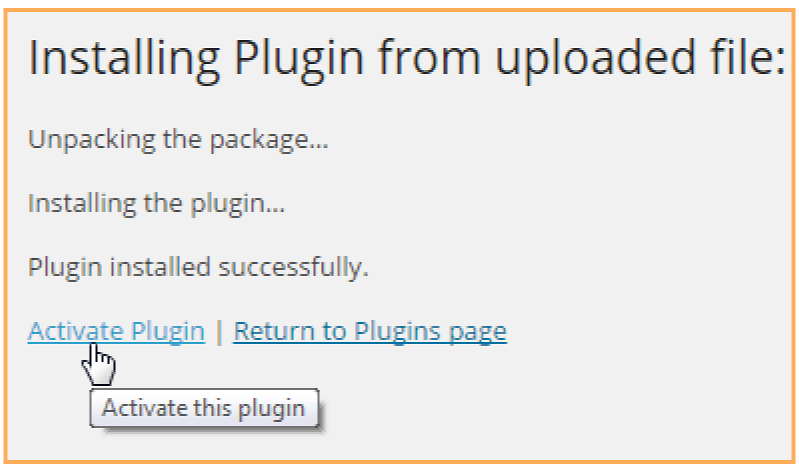
3. Search for the Wild Apricot Login plugin.



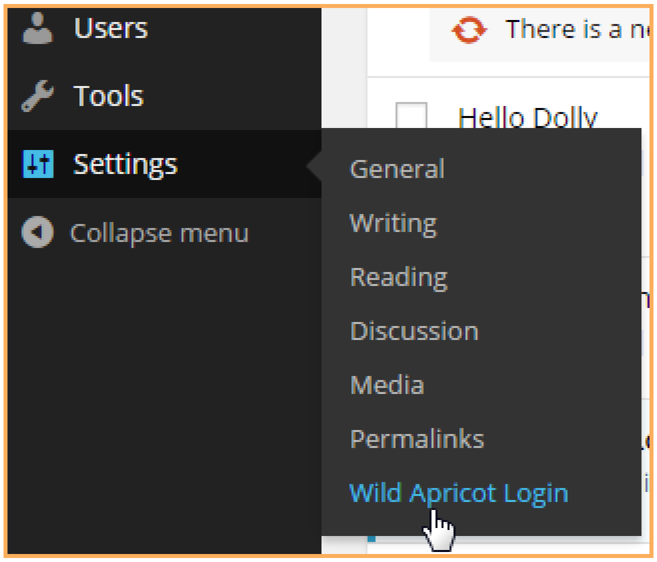
4. Once you've found the Wild Apricot Login plugin, click the **Install Now** button.



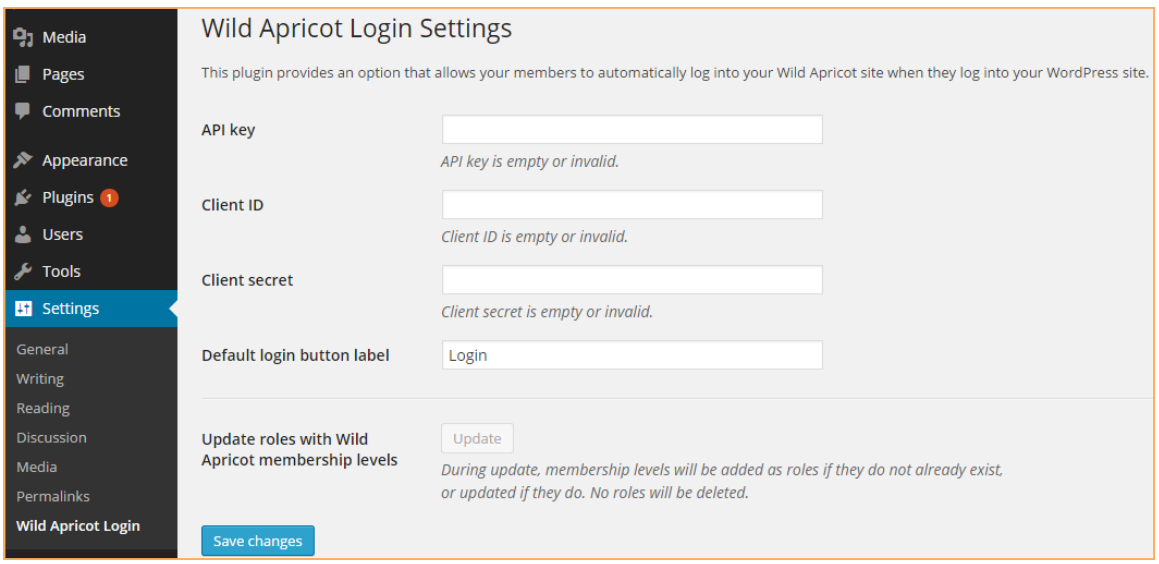
5. When prompted to confirm your choice to install the plugin, click **OK**.
6. After the plugin is installed, click the **Activate Plugin** link.



7. Within your Dashboard, hover over the **Settings** menu and choose the **Wild Apricot Login** option.

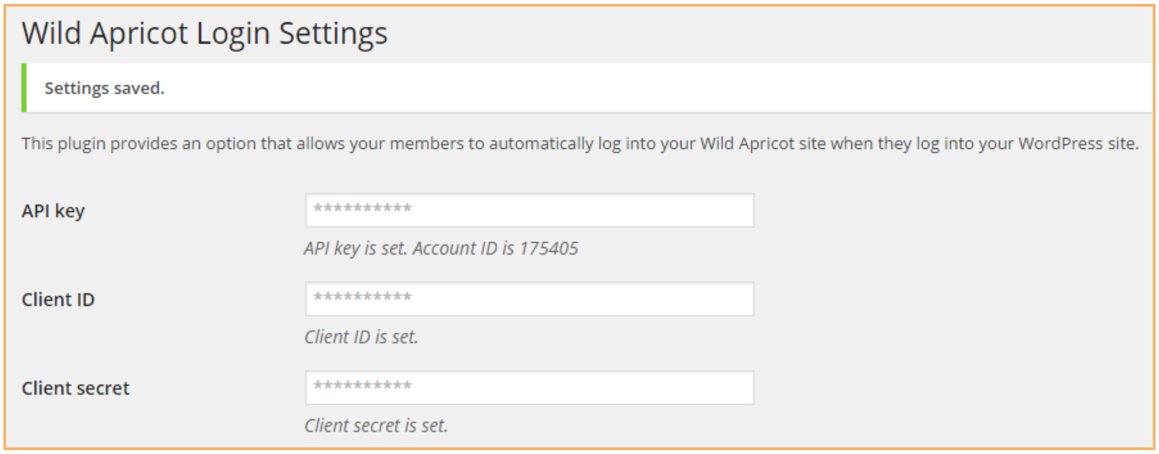


8. Within the Wild Apricot Login settings, enter your Wild Apricot API key, Client ID, and Client secret values. You can obtain these values when you authorize WordPress from the Authorize applications screen in Wild Apricot.

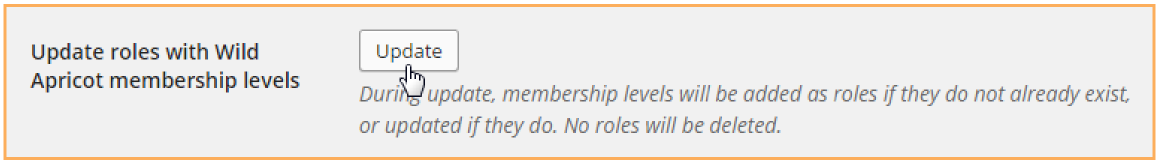


9. Optionally, you can change the default login button label.
10. Click the **Save Changes** button.

The API key, Client ID, and Client secret fields should now appear as set.



Once those fields appear as set, you can click the **Update** button to update your WordPress roles with your Wild Apricot membership levels.



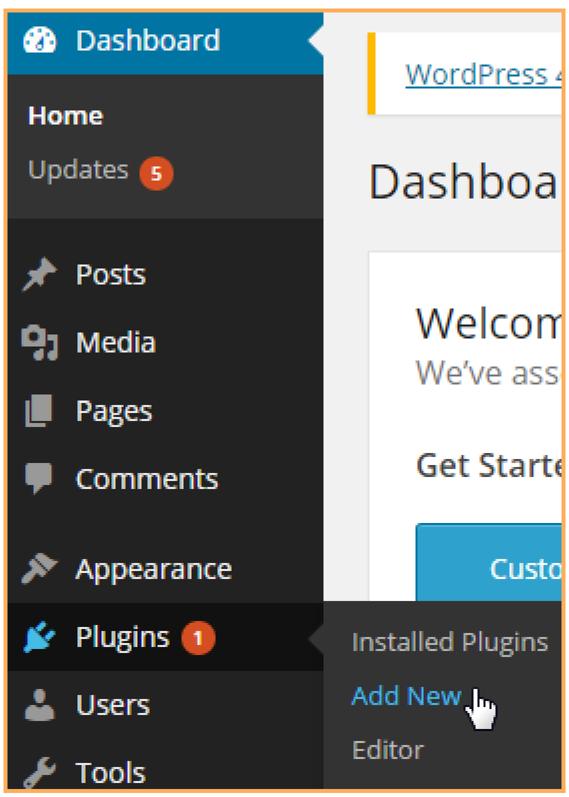
No existing roles will be removed from your WordPress account.

Manual installation

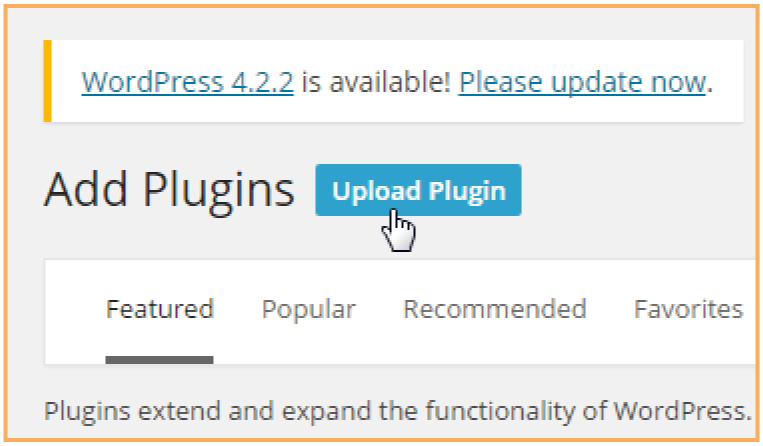
To install the plugin manually, follow these steps:

Read more/less

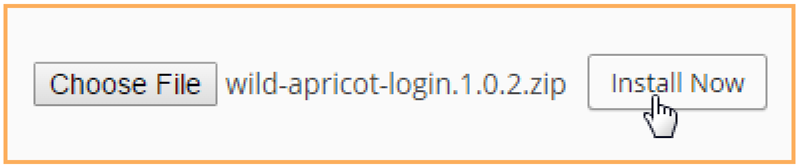
1. Download the zip file containing the Wild Apricot plugin files.
2. Within your Dashboard, hover over the **Plugins** menu and choose the **Add New** option.



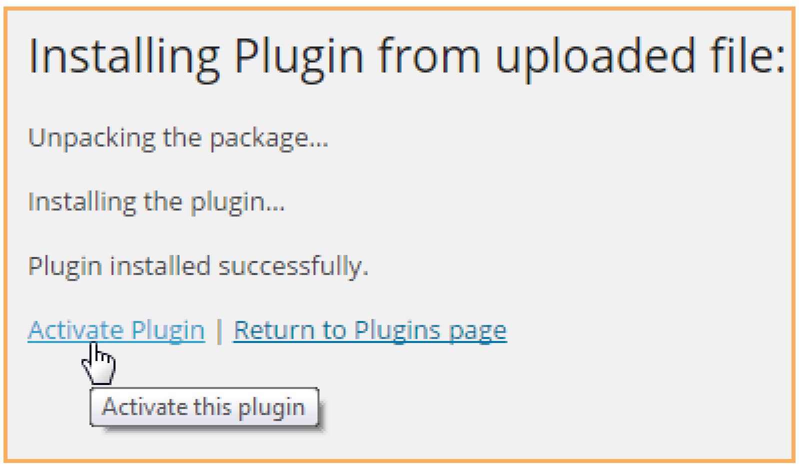
3. Click the **Upload Plugin** button.



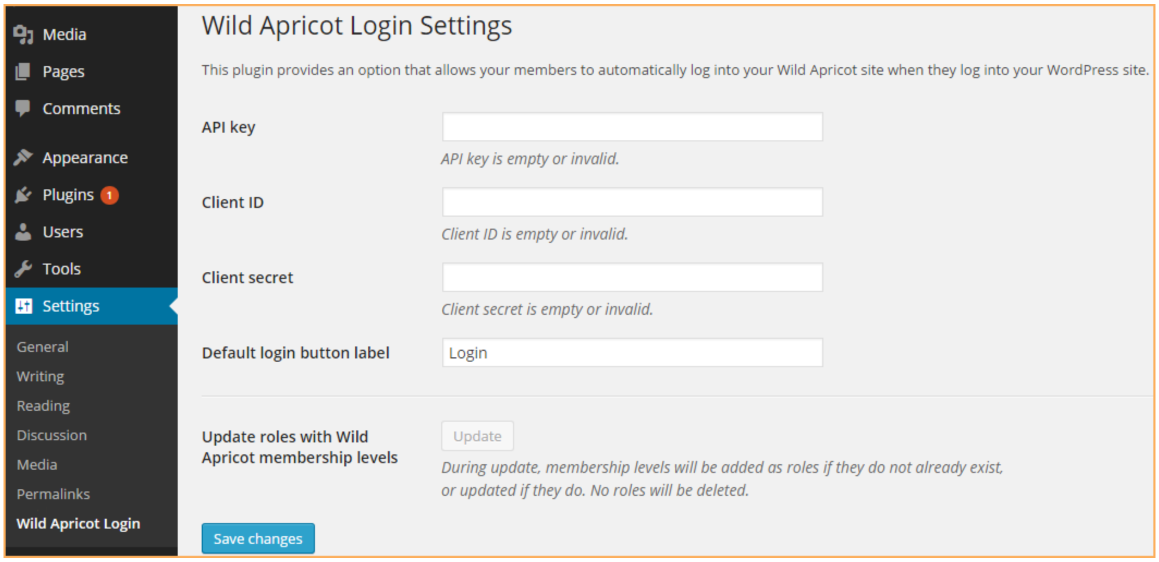
4. Click the **Browse** or **Choose File** button and locate the zip file you downloaded.
5. Click the **Install Now** button.



6. After the plugin is installed, click the **Activate Plugin** link.

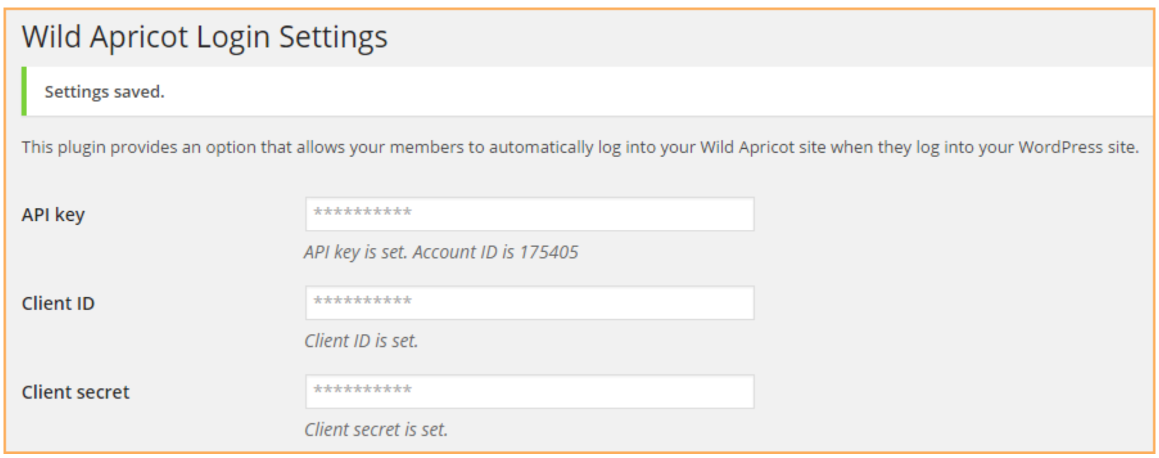


7. Within your Dashboard, hover over the **Settings** menu and choose the **Wild Apricot Login** option.
8. Within the Wild Apricot Login settings, enter your Wild Apricot API key, Client ID, and Client secret values. You can obtain these values when you authorize WordPress from the Authorize applications screen in Wild Apricot.

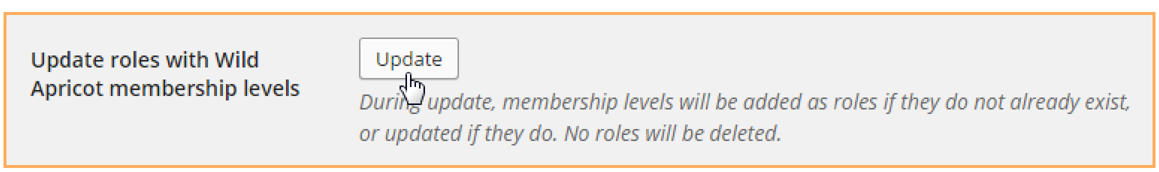


9. Optionally, you can change the default login button label.
10. Click the **Save Changes** button.

    The API key, Client ID, and Client secret fields should now appear as set.



11. Once those fields appear as set, you can click the **Update** button to update your WordPress roles with your Wild Apricot membership levels.



    No existing roles will be removed from your WordPress account.

Using the Wild Apricot plugin on WordPress

Once you installed and configured the Wild Apricot plugin on WordPress, you can use the plugin to:

- display a login button for single sign-on to WordPress and Wild Apricot
- restrict WordPress content to Wild Apricot membership levels (using WordPress roles)

You can also add Wild Apricot widgets to pages and blogs on your WordPress site.

ⓘ The Wild Apricot Login plugin cannot restrict access to an entire page or blog by role/membership level, but there other plugins that can restrict page access by role – e.g. Members or Access Control – but these will not check a member's membership status, making it possible for lapsed members to access a restricted page.

Displaying a login button for single sign-on

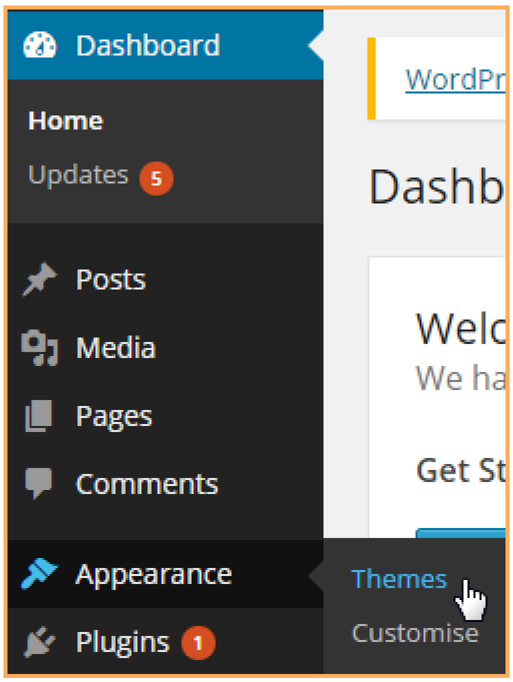
You can display a login button for single sign-on by adding a widget – installed along with the Wild Apricot Login plugin – to the header in your WordPress theme layout, or by inserting a shortcode in your page or blog content.

> The login button automatically appears when you use the wa_restricted shortcode to restrict WordPress content to Wild Apricot members.

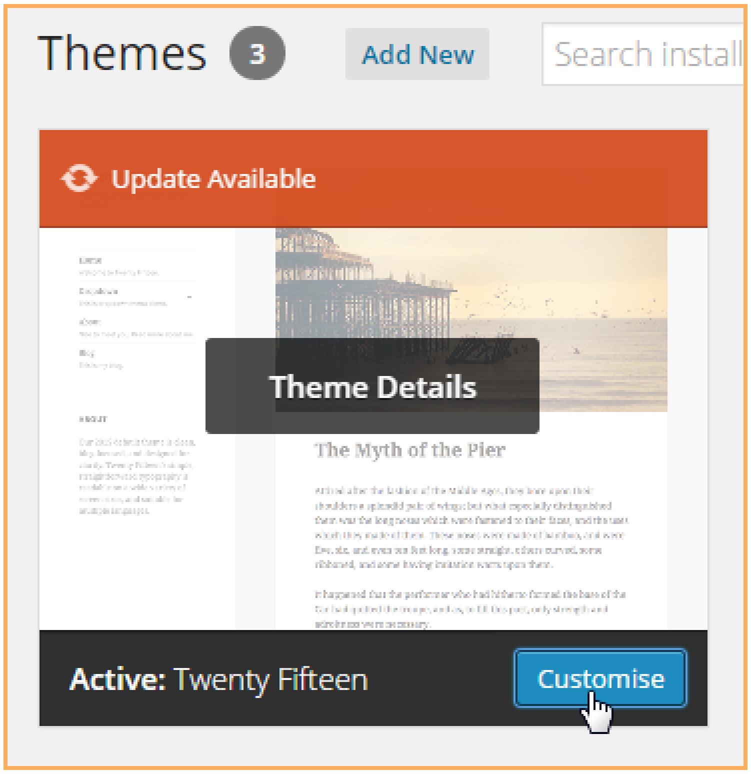
Displaying login button in WordPress theme header

To display the login button within your WordPress theme header – which can appear as a sidebar for some themes – follow these steps:
Read more/less

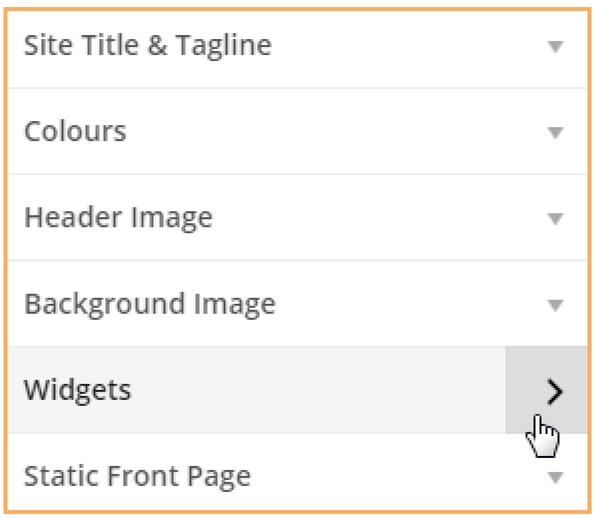
1. Under your Dashboard, hover over **Appearance** then select the **Themes** option.



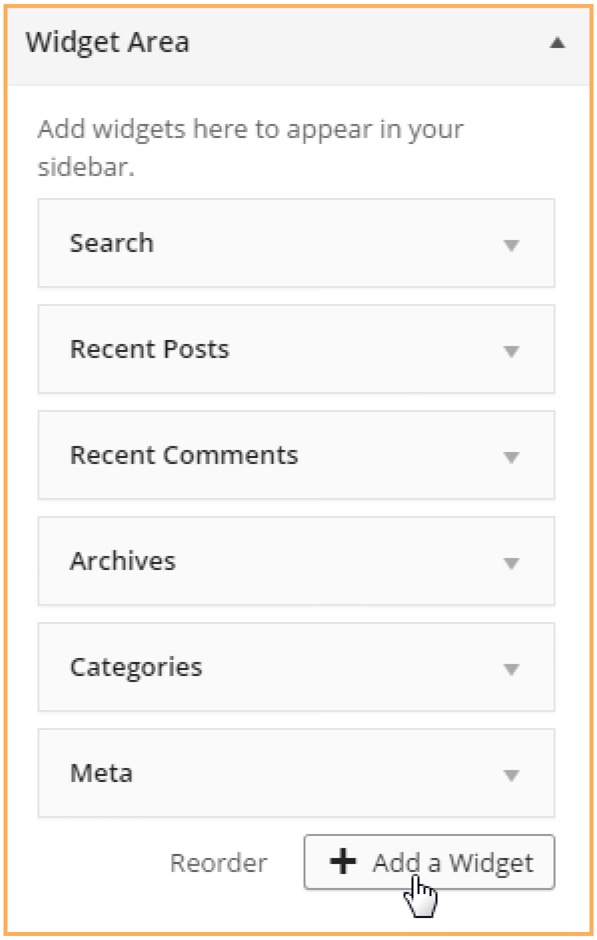
2. On the Themes screen, click the **Customise** button for your current theme.



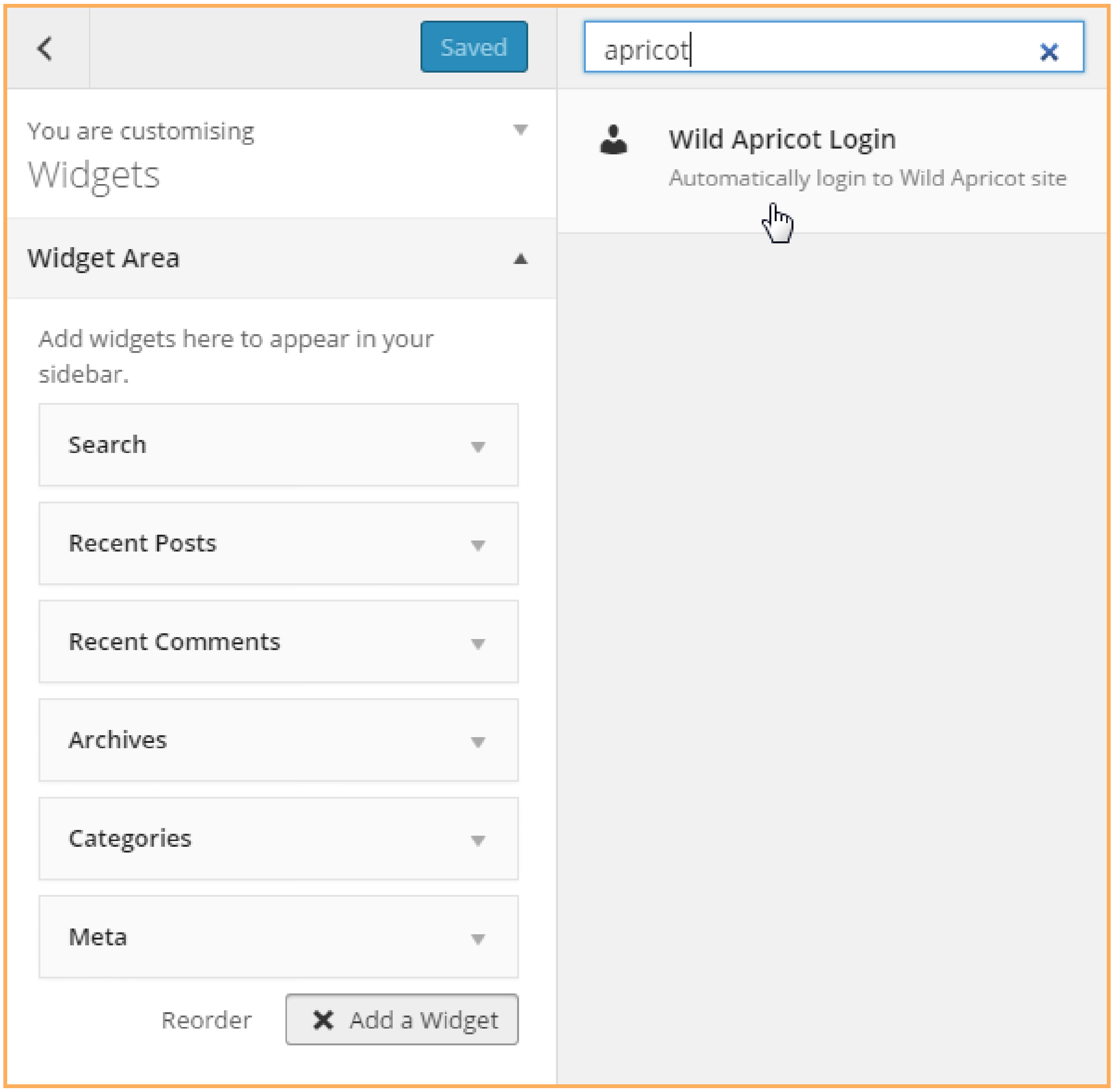
3. Click the **>** button to the right of **Widgets**.



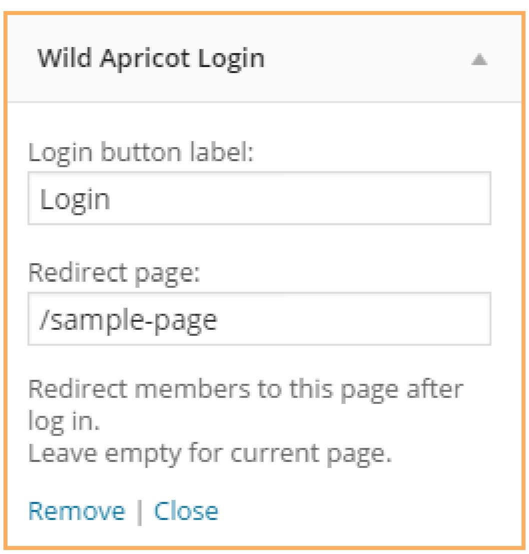
4. Within the Widget area, click the **Add a widget** button.



5. Search for the Wild Apricot Login widget, and click it once found.



6. Within the settings for the Wild Apricot Login widget, you can change the Login button label and specify the name of the WordPress page you want to redirect members to after logging in.



Leave the **Redirect page** field blank if you want them to remain on the current page.

Displaying login button on a WordPress page or blog

To display the login button for single sign-on on a WordPress page or blog, add the following shortcode in either visual or HTML mode:

Read more/less

```
[wa_login login_label="Log in" redirect_page="/"]
```

where the following attributes are optional:

Attribute	Description
`login_label`	Label appearing on the login button. The default is taken from the Wild Apricot Login plugin settings.
`redirect_page`	The WordPress page to redirect the member to after logging in.

In visual mode, you can insert the shortcode by clicking the icon. From the dialog that appears, you can specify the login label and redirect page.

Restricting WordPress content to Wild Apricot members

With the Wild Apricot Login plugin installed, you can restrict access to WordPress content using Wild Apricot membership levels. Only members with a status of Active or Pending - Renewal can access restricted WordPress content.

To restrict WordPress content using Wild Apricot membership levels, add the following shortcode to a page or custom menu in either visual mode or text mode.

Read more/less

```
[wa_restricted roles="Gold, Silver" login_label="Log in" message="Log on to view
restricted content."]
Restricted content.
[/wa_restricted]
```

where the following attributes are available:

Attribute	Description

<table>
<tr><td><code>roles</code></td><td>
WordPress roles corresponding to Wild Apricot membership levels to which you want the content restricted. To include all roles, set the roles attribute to All.
Multiple roles must be separated by a comma. If your membership level name includes a comma, you must use %2C in place of the comma. For example, if the level name is "Students, 1st class" then the shortcode would be [wa_restricted roles="Students%2C 1st class"].
If the name of a membership level changes, the shortcodes must be manually updated even if the corresponding roles are updated.
You can add a not: operator at the start of the roles attribute to specify all roles other than those listed.
<pre>[wa_restricted roles="not:Bronze"
message="Log on to view restricted
content."]
Restricted content.
[/wa_restricted]</pre>
</td></tr>
<tr><td><code>login_label</code></td><td>Label appearing on the login button. The default is taken from the Wild Apricot Login plugin settings.</td></tr>
<tr><td><code>message</code></td><td>Message to appear in place of the restricted content. A login button will appear below the message. You can include HTML markup in your message, but be careful since your code will not be validated by our plugin.</td></tr>
</table>

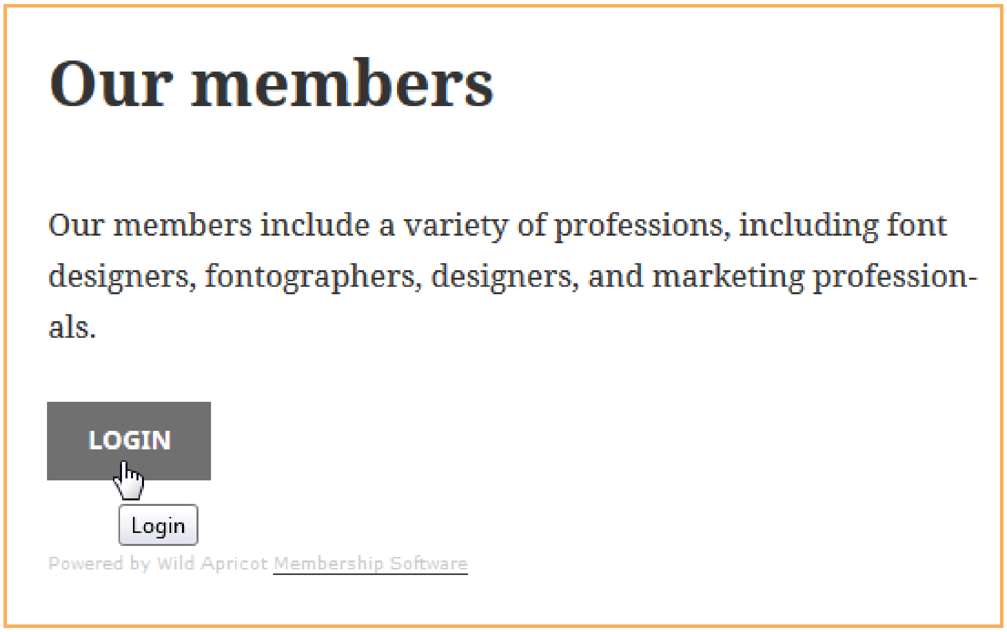
The content between the wa_restricted tags will only appear to authorized users. The restricted content can include other WordPress shortcodes or Wild Apricot widgets.

In visual mode, you can insert the shortcode by clicking the icon. From the dialog that appears, you can specify the role(s), the login label, and the restricted content message.

Using Wild Apricot widgets

With the Wild Apricot Login plugin installed, activated, and set up, any Wild Apricot widgets that you have added that require Wild Apricot authorization will automatically display a Login button in place of the content – unless the visitor has already logged in.

Read more/less



Clicking the Login button will take the visitor to the single sign-on screen.

Using the single sign-on screen

When a visitor to your WordPress site clicks the Login button for single sign-on, a screen similar to the following appears.

Read more/less

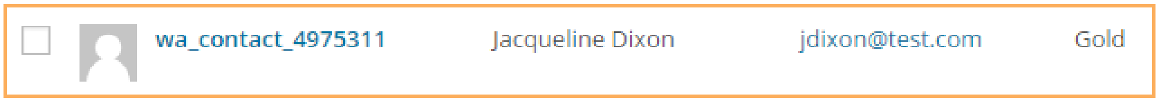
The title appearing at the top of the screen is the **Organization name** setting on your Wild Apricot Authorized applications screen. The text below the title is drawn from the **Introductory text** field.

The single sign-on screen is hosted on your Wild Apricot site. On this screen, your visitor enters their Wild Apricot credentials then clicks the **Login** button. If your member does not remember their password, they can click the **Forgot password** link . On the page that appears, they can enter their email address to receive a reset password link via email.

Once authenticated on your Wild Apricot site, the member is also signed into your WordPress account. If a user with the same email address can't be found within your WordPress account, a new user will be added with the following username:

```
wa_contact_USERID
```

where USERID is the member's Wild Apricot userid. Other user profile fields – First name, Last name, Nickname (combining First name and Last name), Email, Organization, and Member status – will be filled using information in the member's Wild Apricot contact details. Their role will be set to their membership level.



If their membership level does not already exist as a role, one will be created. If they do not have a membership level, they will be assigned a role of *WA non-member contact*.

> You cannot log into the single sign-on screen using a Wild Apricot account with the same email address as your WordPress administrator account.

If the user changes the email address for their Wild Apricot account and logs into the single sign-on screen again, the userid embedded in their username will be used to connect their two accounts. Any changes made to their contact details on Wild Apricot since their last logon will be used to update their WordPress user profile.

> WordPress users with a role of Administrator will not have their user profiles updated.

Where the member ends up after logging in depends on your widget or shortcode settings.

Once your member is logged in, the Login button on your WordPress site becomes a Logout button. Clicking the Logout button will log the member out of both their Wild Apricot and WordPress accounts.

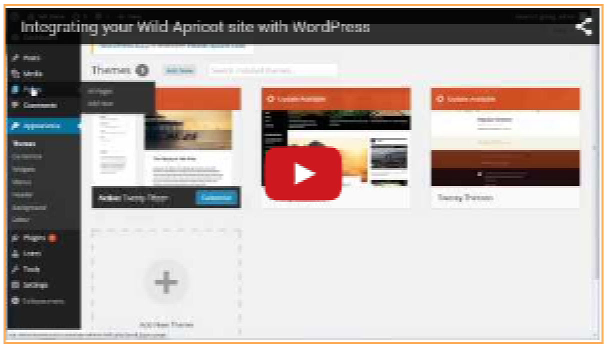
Testing your WordPress integration

You cannot log into the single sign-on screen using a Wild Apricot account that uses the same email address as your WordPress administrator account. If your Wild Apricot administrator account uses the same email as your WordPress administrator account, you might want to create a test member on Wild Apricot to test your WordPress integration.

Troubleshooting

Below is a list of commonly encountered issues and possible solutions or explanations.

- *I can't see a Plugins option within my WordPress Dashboard*.
  Only WordPress.org users can download plugins. If you are a WordPress.com user, you won't be able to set up integration between WordPress and Wild Apricot.
- *I'm trying to test my WordPress integration but I can't log into the single sign-on screen*.
  You cannot log in with the same email address as the one in your WordPress administrator account.
- *I've made updates to user profiles in WordPress but the changes aren't showing up in the Wild Apricot contact details*.
  Automatic updates go in only one direction: from Wild Apricot to WordPress.
- *I've deactivated and deleted the Wild Apricot Login plugin on WordPress, but the roles and users it added are still in my account.*
  Deactivation or deletion of the Wild Apricot Login plugin will not remove the Wild Apricot users and roles from your WordPress account. You'll have to remove them manually.
- *I've updated a WordPress user profile but my changes were overwritten when the user logged on using the single sign-on form*
  Change to the WordPress user profiles will be updated with the information from their Wild Apricot contact details when they log on using the single sign-on form. if you're planning on integrating your Wild Apricot site with WordPress, you should get in the habit of making changes to contact details on Wild Apricot only.
- *Can I restrict access to an entire page or blog by role/membership level?*
  Yes, but not using the Wild Apricot plugin. There are other plugins that allow you to restrict page access by role – e.g. Members or Access Control – but these will not check a member’s membership status, making it possible for lapsed members to access a restricted page.



Video: Integrating with WordPress (8:51)

On this page:

Expand all sections

Wild Apricot admin API

Wild Apricot admin API

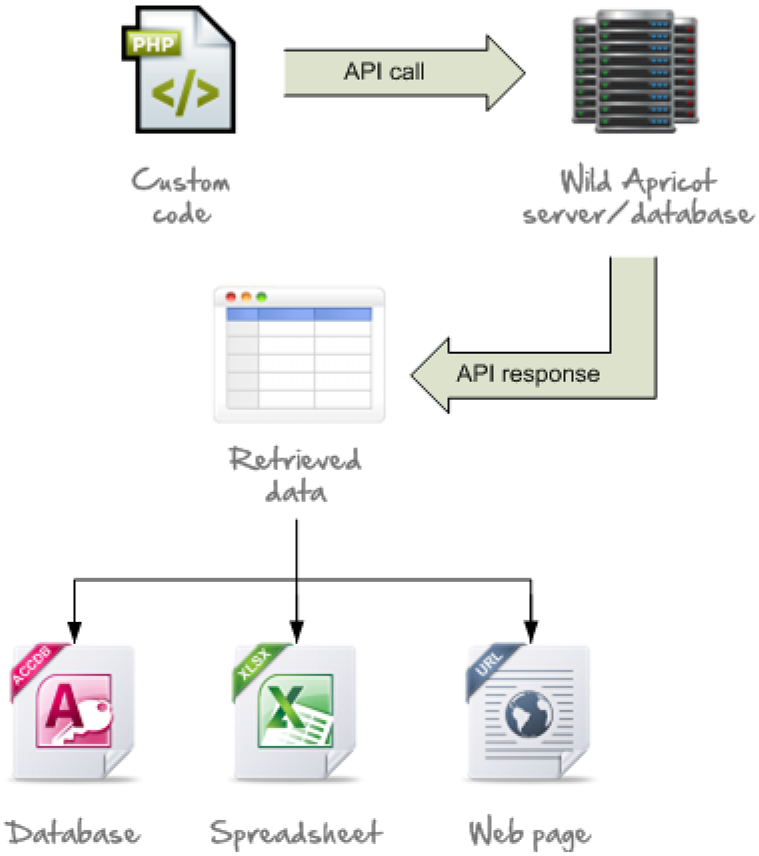
Wild Apricot's API is intended for use by developers with technical expertise. If you need assistance, we provide support via email or through our Developers forum.

By using Wild Apricot's API, you accept the API License Agreement.

About Wild Apricot's admin API

An API – Application Programming Interface – is a set of functions that allow programs to interact with each other. With Wild Apricot's admin API, you can create programs to automatically retrieve or update data stored in your Wild Apricot database. Version 1 of Wild Apricot's API can be used only to retrieve information, while Version 2 now provides the ability to update contact information, event registration, and payments, along with a number of new API calls you can use to retrieve additional information.

The retrieved data can be backed up, used to update another database, displayed on a web page, or passed onto another program for further processing or reporting.



The same application could retrieve data from an external database and use it to update your Wild Apricot database.

For example, you could use Wild Apricot's API to:

- Create an Excel file that retrieves all your contacts with a single click and automatically generates a report or a chart.
- Add code to a desktop database like Access or FileMaker that would regularly check your Wild Apricot account for new or updated records and automatically download them.
- Automatically retrieve and store backup copies of your Wild Apricot contact database on a regular basis.
- Develop your own website plugin to display a specially formatted list of your contacts – if Wild Apricot's member directory widget is not customizable enough for your needs.

Using Version 2 of the API, you could

- Update Wild Apricot email preferences using an unsubscribe list maintained through an external email system.
- Create and update payments in Wild Apricot using information stored in an external accounting system.

An API consists of a number of API calls, each of which performs a specific function. For example, Wild Apricot's MembershipLevels API call allows you to retrieve detailed information about your membership levels. As part of an API call, you can include *parameters*, which are instructions or information used by the API to process your request.

> Using API calls to retrieve data from Wild Apricot databases requires significant programming knowledge. If you want to take advantage of this functionality but lack the technical knowledge, you can engage the services of an approved Wild Apricot partner.

Using Wild Apricot's API

Wild Apricot's API can be accessed from a 3rd-party server or application, or from a Wild Apricot site page. For information on differences between the two, see API access options.

Wild Apricot's API adheres to RESTful web service principles. The API calls take the form of HTML GET, PUT, POST, or DELETE requests formatted in either JSON (JavaScript Object Notation) or XML (Extensible Markup Language).

Versioning

The version number of the Wild Apricot API is included in the API call to allow existing applications to function after new versions are released.

In the following example, the *v2* value directs the call to version 2 of the Wild Apricot API.

```
GET https://api.wildapricot.org/v2/Accounts
```

A call to the base API – https://api.wildapricot.org – will return a list of available API versions.

Currently two version of the Wild Apricot API are available: Version 1 and Version 2. The process for authenticating accounts differs depending on the API version.

API responses

Results from Wild Apricot API calls can be returned in either JSON (JavaScript Object Notation) or XML (Extensible Markup Language) formats. The default format is JSON.

To specify the response format, include the following field in the HTTP header:

```
Accept: application/{format}
```

where *{format}* can be either *json* or *xml*.

You can compress the response by including the following field in the HTTP header:

```
Accept-Encoding: gzip, deflate
```

For more information on compressing data in server responses, see HTTP compression.

API request limits

Currently, the limits on the number API request per minute are:

- 20 requests involving multiple contacts
- 60 requests involving single contacts
- 200 other requests.

On this page:

See also:

- API access options
- API Version 1
- API Version 2

API access options

API access options

> Wild Apricot's API is intended for use by developers with technical expertise. If you need assistance, we provide support via email o r through our Developers forum.

Wild Apricot's API supports access from a 3rd party server or application, or from a Wild Apricot site page.

From 3rd party server/application

Using Wild Apricot API calls, a 3rd-party server or application can retrieve, display, and update information stored in your Wild Apricot database.

The same base API address – https://api.wildapricot.org/ – is used for calls from 3rd-party servers and applications, including those placed by mobile applications. A Base API call will retrieve a list of API versions. If you add the version number to the base API call, a list of top-level API calls will be returned.

Only encrypted HTTP requests – ones that begin with *https* – are supported for calls from 3rd-party servers or applications. Insecure requests – ones that begin with *http* – are not supported.

Each Wild Apricot API call must include authentication information that verifies your account and prevents others from accessing your data. F or more information, see Authenticating API access from a 3rd-party server or application .

From a Wild Apricot site page

Using Version 2 of Wild Apricot's API, you can embed JavaScript code in your Wild Apricot site pages that uses Wild Apricot API calls to retrieve, display, and update Wild Apricot database information.

An account-specific URL is used to access Wild Apricot's API from Wild Apricot site pages:

```
http://your_account_url/sys/api/
```

where *your_account_url* is your Wild Apricot domain name.

When accessing the account-specific URL using JavaScript, the protocol should match the protocol currently being used by the browser, so the best choice is to use relative URLs in the API call.

For example, instead of:

```
http://stevelivetestsite.wildapricot.org/sys/api/v2/accounts/1/contacts/me
```

you would use:

```
/sys/api/v2/accounts/1/contacts/me
```

Within your code, access to your Wild Apricot data is limited by the access permissions of the currently authenticated user. Consequently, the API cannot be accessed within public pages that do not require user authentication.

Each Wild Apricot API call must include authentication information that verifies your account and prevents others from accessing your data. For information, see Authenticating API access from a Wild Apricot site page .

Comparing access options

The following summarizes the differences between the two access options.

	3rd-party server/application	Wild Apricot site page
Base API address	https://api.wildapricot.org/	http://*your_account_url*/sys/api/ where *your_account_url* is your Wild Apricot domain name
Supported protocols	HTTPS	HTTP, HTTPS
Access permissions	Depends on authentication method	Those of the currently authenticated user
Access from	External server/application	Wild Apricot site page

Sample uses	Server-to-server scenarios Mobile/desktop applications	Use JavaScript for custom display of Wild Apricot data

On this page:

- From 3rd party server/application
- From a Wild Apricot site page
- Comparing access options

Authenticating API access from a 3rd-party server or application

Authenticating API access from a 3rd-party server or application

Wild Apricot's API is intended for use by developers with technical expertise. If you need assistance, we provide support via email or through our Developers forum.

Each Wild Apricot API call must include authentication information that verifies your account and prevents others from accessing your data. The required authentication information – and how it is passed – differs depending on whether you are accessing the API from a 3rd party server or application, or from a Wild Apricot site page. For more information on access options, see API access options. For information on authenticating from a Wild Apricot site page, see Authenticating API access from a Wild Apricot site page.

With Wild Apricot's API, server-side authentication is a two-step process. In the first step, the client application requests an authentication token from the authentication server. In the second step, the authentication server returns an authentication token, which the client application uses in the API call.

Wild Apricot API uses the OAuth authentication standard and issues OAuth authentication tokens. Wild Apricot's authentication tokens are valid for a limited period of time. You can send a request to the authentication server to refresh the token after it has expired.

You can also use the authentication server to log out, and to change your password.

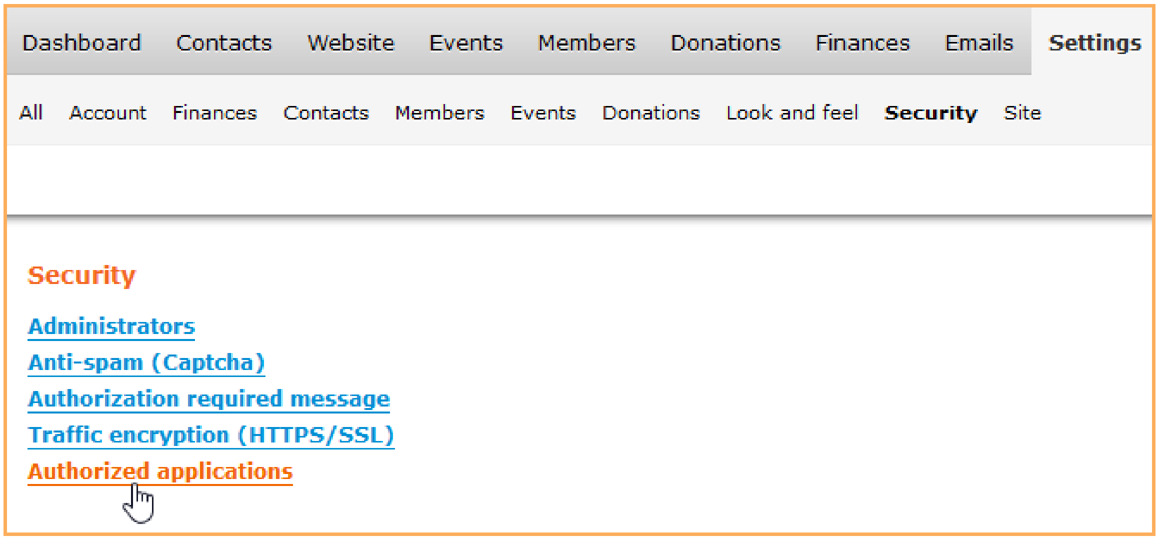
Authorizing your application

When accessing Wild Apricot's API, an 3rd-party server or application must first be authorized to access your Wild Apricot account. During authorization, the application will be assigned a unique API key. If the application provides account access to individual users (via a mobile app, for example), the application can be assigned a client ID and a client secret as well.

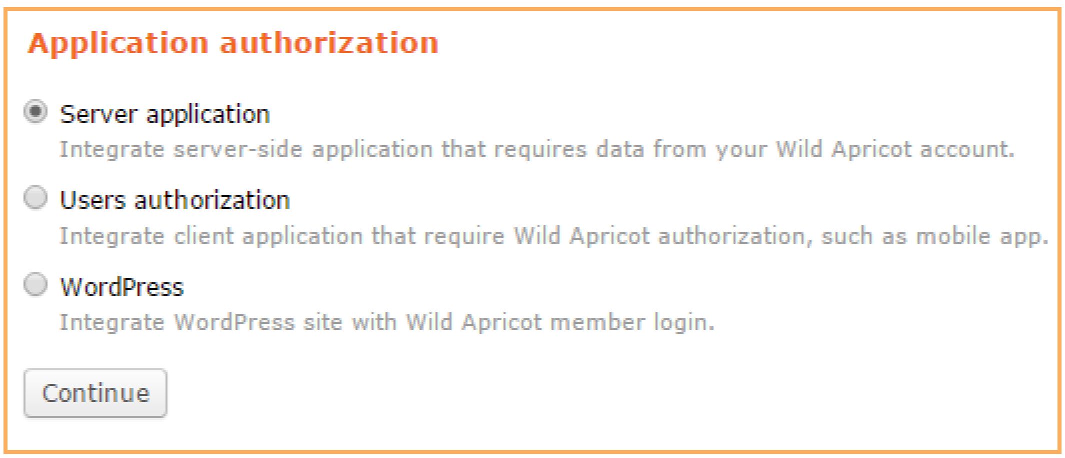
If you've previously generated an API key for your account – prior to the 5.4 release – it will automatically be converted to an authorized application called **Legacy API key**.

To authorize a server or application to access your Wild Apricot account, follow these steps:

1. Hover over the **Settings** menu and select the **Security** option.
2. Within the Security settings screen, select the **Authorized applications** option.



3. Within the Application authorization screen, click the **Server application** option if your application does not provide account access to individual users, or **Users authorization** if it does. Then, click the **Continue** button.



4. From the Application details screen, copy the API key. If there is no API key displayed, click the **Generate API key** button.
5. Choose whether you want the application to have read-only access or full access to your Wild Apricot account. If you choose read-only access – and request an authentication token using the API key – then only those functions represented by scopes that ends with *_view* (see below) will be accessible to your application.
6. If your application provides account access to Wild Apricot users, copy the **Client ID** and **Client secret** values. If there is no **Client secret** value displayed, click the **Generate client secret** button.
7. If your application provides account access to users, choose whether to authenticate users via Wild Apricot's single sign-on screen. If you disable this option, the application can still access data in your Wild Apricot account, but users will not be logged in their Wild Apricot accounts within their browser.
8. If you enable single sign-on, you can also specify the organization name and introductory text to be displayed on the single sign-on screen, and whether to allow users to log in using their Facebook or Google+ credentials ..
9. Click the **Save** button to save your changes.

Requesting the authentication token

There are three methods you can use to request the authentication token you need to include in the Wild Apricot call. You can use:

- the application's API key
- Wild Apricot user credentials
- the authorization code returned by Wild Apricot's single sign-on service

For information on using the authorization code for authentication, see Single sign-on service. For information on using the application API key and Wild Apricot user credentials, see below.

Using the application's API key

To request an authentication token using your application's API key, you pass the key in the authorization header. Within the authorization header, the authorization type must be Basic, and the credentials must be delimited by a colon (:) and encoded in base64. The credentials use the following syntax:

```
username:password
```

where *username* equals **APIKEY** and *password* is the API key assigned when the application was authorized.

The client application should keep the API key secret and provide it only to https://oauth.wildapricot.org/auth/token and only over HTTPS with a valid certificate.

The request body must provide the following parameters using the *application/x-www-form-urlencoded* format with a character encoding of UTF-8 in the HTTP request entity-body.

Parameters

Variable	Description
grant_type	Must be set to **client_credentials** .
scope	The functional areas that can be accessed. Multiple scopes must be separated by spaces. Click here for a list of supported scopes.

Example

In this example, the client application makes the HTTP request over https:

```
POST /auth/token HTTP/1.1
    Host: oauth.wildapricot.org
    Authorization: Basic MTIzOnJrdHVkN2FucW91aWJ0ZG0xZDR5aG9iOWRneQ==
    Content-Type: application/x-www-form-urlencoded

grant_type=client_credentials&scope=contacts finances events
```

Using Wild Apricot user credentials

You can request authentication using the credentials of any Wild Apricot user, whether an account administrator or not.

To request an authentication token using Wild Apricot user credentials, you pass the client ID and client secret – assigned when the application was authorized – in the authorization header. Within the authorization header, the authorization type must be Basic, and the credentials must be delimited by a colon (:) and encoded in base64. The credentials use the following syntax:

```
username:password
```

where *username* is the client ID and *password* is the client secret assigned when the application was authorized.

The client application should keep the client credentials secret and provide it only to https://oauth.wildapricot.org/auth/token and only over HTTPS with a valid certificate.

The credentials of the Wild Apricot user are passed within the request body. The request body must provide the following parameters using the *application/x-www-form-urlencoded* format with a character encoding of UTF-8 in the HTTP request entity-body.

Parameters

Variable	Description
grant_type	Must be set to **password**.
username	The username of the Wild Apricot user.
password	The password of the Wild Apricot user.
scope	The functional areas that can be accessed. Multiple scopes must be separated by spaces. Click here for a list of supported scopes.

Example

In this example, the client application makes the HTTP request over https:

```
POST /auth/token HTTP/1.1
    Host: oauth.wildapricot.org
    Authorization: Basic czZCaGRSa3F0MzpnWDFmQmF0M2JW
    Content-Type: application/x-www-form-urlencoded

grant_type=password&username=johndoe@gmail.com&password=123456&scope=contacts
finances events
```

Authorization response

After receiving the authentication request, the authorization server authenticates the client application and validates the API key, and if valid, issues an access token.

```
HTTP/1.1 200 OK
    Content-Type: application/json;charset=UTF-8
    Cache-Control: no-store
    Pragma: no-cache

    {
      "access_token":"2YotnFZFEjr1zCsicMWpAA",
      "token_type":"Bearer",
      "expires_in":1800,
      "refresh_token":"tGzv3JOkF0XG5Qx2TlKWIA",
      "permissions":[
            {
                accountId:123,
                availableScopes:["contacts_view", "contacts_me", "contacts_edit",
"finances_view", "events_view"]
            }
        ]
    }
```

In this example:

- **access_token** is the token, which can be used to access the API.
- **token_type** is a type of authorization token. Currently Wild Apricot's API supports only the Bearer token type.
- **expires_in** is the number of seconds the access token is valid for. By default, Wild Apricot's API expires after 1800 seconds (30 minutes). After the time has elapsed, the token expires and cannot be used to access the API. You can, however, refresh the token.

- **refresh_token** is a token, which is used to refresh the access token.
- **permissions** is a collection of available scopes for each account, where *accountId* is the account number.

If the request is not valid, an error description will be returned.

Supported scopes

As part of the authentication request, you can specify the scope – the functional areas that can be accessed by the application. Multiple scopes must be separated by spaces. The following scope values can be used:

Area	Description
auto	Maximum allowed scope is automatically detected. When authenticating using the API key, the maximum scope depends on the API key access level set when authorizing the application. When authenticating with user credentials, the maximum scope is derived from the user's Wild Apricot account permissions.
account_view	View account information.
contacts_edit	Modify contact details.
contacts_me	View user's own contact details.
contacts_view	View contact details.
event_registrations_edit	Modify event registrations.
event_registrations_view	View event registrations.
events_view	View event details.
finances_edit	Modify invoices, payments, payment allocations, and tenders.
finances_view	View invoices, payments, payment allocations, and tenders.
membership_levels_view	View membership levels.
account	Obsolete. Replaced by account_view (see above)
contacts	Obsolete. Replaced by contacts_view and contacts_edit (see above)
finances	Obsolete. Replaced by finances_view and finances_edit (see above)
events	Obsolete. Replaced by events_view (see above)
event_registrations	Obsolete. Replaced by event_registrations_view and event_registrations_edit (see above)
membership_levels	Obsolete. Replaced by membership_levels_view (see above)

Obsolete scopes within existing code will be automatically substituted.

Using the authentication token

Any request to Wild Apricot's API must include the authorization token in the HTTP header. The header should contain the token type and the authorization token, delimited by a space. The only supported token type is Bearer.

Below is a sample API call, including the authorization token:

```
GET /v2/accounts HTTP/1.1
Host: api.wildapricot.org
Authorization: Bearer 2YotnFZFEjr1zCsicMWpAA
```

If the authorization token is invalid or expired, then a status code of 401 will be returned, and the response body will include a reason field. Below is a sample JSON response to an invalid token:

```
{
reason:”invalid_token”
}
```

Refreshing the token

If an access token is expired, the client application can make a refresh request to the authentication server, providing the following parameters using the *application/x-www-form-urlencoded* format with a character encoding of UTF-8 in the HTTP request entity-body:

Variable	Description
grant_type	Must be set to **refresh_token**
refresh_token	The refresh_token from the authorization response

Example

```
POST /auth/token HTTP/1.1
    Host: oauth.wildapricot.org
    Authorization: Basic MTIzOnJrdHVkN2FucW91aWJ0ZG0xZDR5aG9iOWRneQ==
    Content-Type: application/x-www-form-urlencoded

grant_type=refresh_token&refresh_token=tGzv3JOkF0XG5Qx2TlKWIA
```

Expiring a token

Authorization tokens automatically expire after a certain period of time. You can, however expire a token before that time. If you do so, you should also delete the refresh token.

The following request expires an existing token.

```
GET https://oauth.wildapricot.org/auth/expiretoken?token={oauth_token}
```

The following request deletes the existing refresh token.

```
GET
https://oauth.wildapricot.org/auth/deleterefreshtoken?refreshToken={oauth_refresh_to
ken}
```

There is no response from the server in either case.

Changing passwords

If you requested the authorization token using administrator account credentials, you can use the authorization server to change your account password. To change your password, make a POST request to https://oauth.wildapricot.org/auth/password, using the following parameters.

Parameters

Variable	Description
token	Valid authentication token
accountID	Wild Apricot account ID
password	New password

Example

```
POST https://oauth.wildapricot.org/auth/password
{
  "Token":"ma4owieutrlvajsdfja34mo2jmwej",
  "AccountId":123,
  "Password":"newPassword123"
}
```

Response fields

If password is successfully changed, the API returns HTTP 200 OK and no data in response body. If password change fails, the API returns an error field describing the error.

On this page:

Authenticating API access from a Wild Apricot site page

Authenticating API access from a Wild Apricot site page

> ⚠ Wild Apricot's API is intended for use by developers with technical expertise. If you need assistance, we provide support via email or through our Developers forum.

Using Version 2 of Wild Apricot's API, you can embed JavaScript code in your Wild Apricot site pages that uses API calls to retrieve, display, and update Wild Apricot database information. Within each API call, you must include authorization information that verifies your account and prevents others from accessing your data. Specifically, you must include the client ID that is generated when you authorize your application.

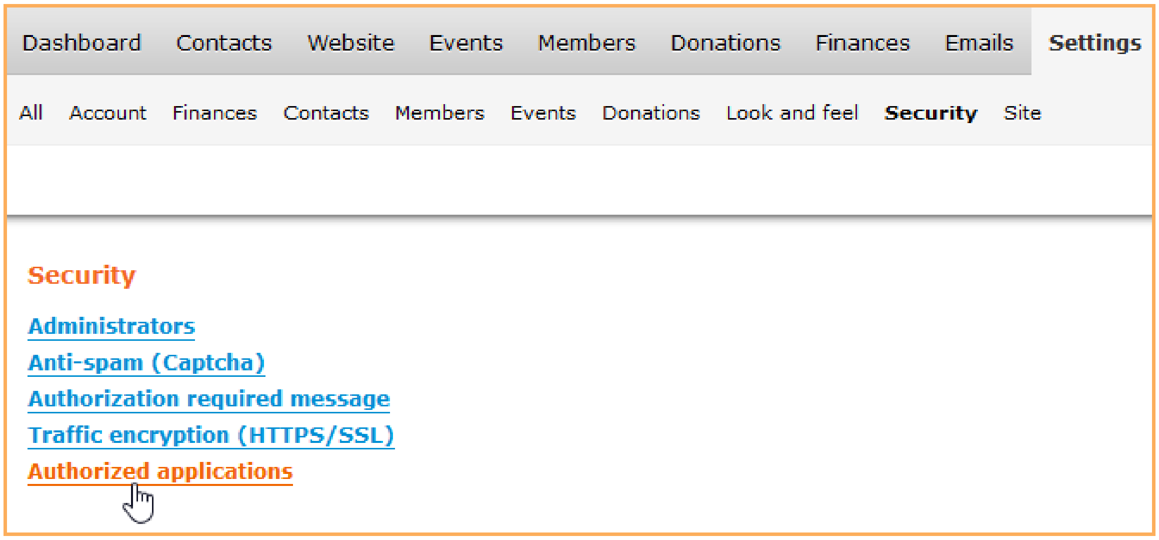
For information on authenticating from a 3rd-party server or application, see Authenticating API access from a 3rd-party server or application.

Authorizing your application

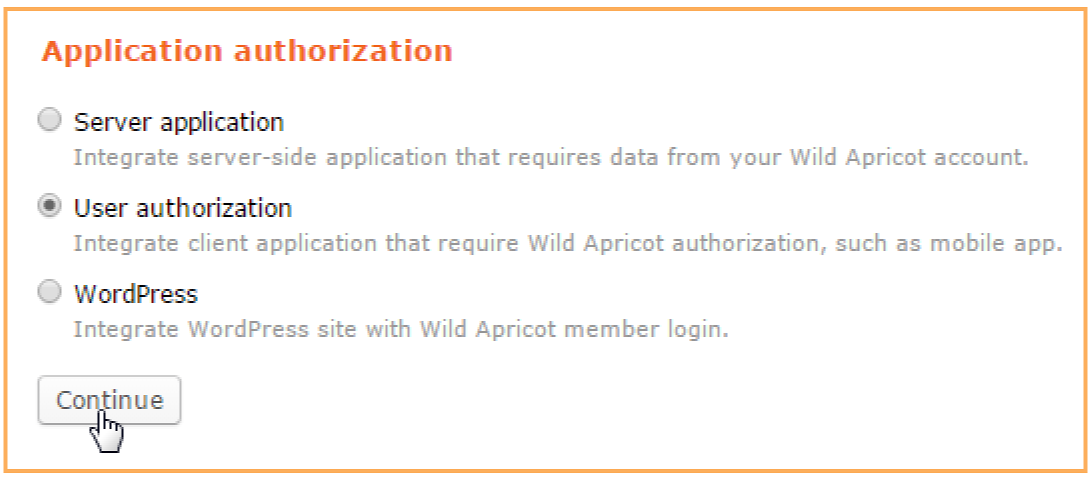
Even though JavaScript within a site page does not constitute a separate application, you must authorize an application to generate the client ID required to verify your account and prevent unauthorized access to your Wild Apricot data.

To authorize an application for access to your Wild Apricot account, follow these steps:

1. Hover over the **Settings** menu and select the **Security** option.
2. Within the Security settings screen, select the **Authorized applications** option.



3. Within the Application authorization screen, click the **User authorization** option then click the **Continue** button.



4. From the Application details screen, copy the **Client ID** value. This is the value you must pass within your API calls.
5. Click the **Save** button to save your changes.

Accessing the API

An account-specific URL is used to access Wild Apricot's API from Wild Apricot site pages:

```
http://your_account_url/sys/api/
```

where *your_account_url* is your Wild Apricot domain name.

When accessing the account-specific URL using JavaScript, the protocol should match the protocol currently being used by the browser, so the best choice is to use relative URLs in the API call.

For example, instead of:

```
http://stevelivetestsite.wildapricot.org/sys/api/v2/accounts/58293/contacts/me
```

you would use:

```
/sys/api/v2/accounts/58293/contacts/me
```

Passing authorization information

Each API call made from within a Wild Apricot site page must include the client ID value that is generated when you authorize your application (see above). The authorization information verifies your account and prevents others from accessing your data.

Within your JavaScript, the client ID should be passed in the HTTP header, using the following format:

```
clientId: APPLICATION_CLIENT_ID
```

For example, within jQuery code, the call might appear as follows:

```
<script>
    $(document).ready(function(){
        $.ajax(
        {
            url: "/sys/api/v2/accounts/58293/contacts/me",
            type: "GET",
            dataType: "json",
            cache: false,
            async: true,
            headers: { "clientId": "APPLICATION_CLIENT_ID" },
            success: function (data, textStatus, jqXhr) {
                alert("Current contact id:" + data.Id + ". Contact email:" +
data.Email);},
            error: function (jqXHR, textStatus, errorThrown) {
                alert(textStatus + " (" + jqXHR.status + ") : " + errorThrown);}
        });
    });
</script>
```

Access to Wild Apricot data will be limited by the access permissions of the currently authenticated user. Consequently, the API cannot be accessed within public pages that do not require user authentication.

All Wild Apricot API calls must also include the account number – 58293 in the above examples – that appears on the Account and billing screen and is returned by the Accounts API call.

On this page:

See also:

- Authenticating API access from a 3rd-party server or application

API Version 1

Wild Apricot API Version 1

Wild Apricot will be discontinuing Version 1 of our API as of November 1, 2017. All Version 1 functionality is available in Version 2 of our API. For information on transitioning from Version 1 to Version 2, click here.

- About Wild Apricot's API
- Wild Apricot API calls
- Using Wild Apricot's API
    - Secure access
    - Authentication
    - Versioning
    - API responses
    - API request limits

See also:

- API Version 2

- API V1 calls
- API V1 status codes
- API V1 browser
- Sample API program
- Using the sample Excel file

By using Wild Apricot's API, you accept the API License Agreement.

About Wild Apricot's API

An API – Application Programming Interface – is a set of functions that allow programs to interact with each other. With Wild Apricot's API, you can create programs to automatically retrieve data from your Wild Apricot database. Version 1 of Wild Apricot's API can be used only to retrieve information, while Version 2 now provides the ability to update contact information, event registration, and payments, along with a number of new API calls you can use to retrieve additional information.

The retrieved data can be backed up, used to update another database, displayed on a web page, or passed onto another program for further processing or reporting.

An API consists of a number of API calls, each of which performs a specific function. For example, Wild Apricot's MembershipLevels API call allows you to retrieve detailed information about your membership levels. As part of an API call, you can include *parameters*, which are instructions or information used by the API to process your request.

Using API calls to retrieve data from Wild Apricot databases requires significant programming knowledge. If you want to take advantage of this functionality but lack the technical knowledge, you can engage the services of an approved Wild Apricot partner. Not a programmer? You can use the supplied Excel file to download contact records right away – no programming required.

Wild Apricot API calls

Wild Apricot API calls can be used to retrieve the following information from your Wild Apricot database.

Results	For more information, see...
A list of API versions	Base API call
A list of top-level API calls for a particular version	Base API call
Details about your Wild Apricot account	Accounts API V1 call

Details about your membership levels	MembershipLevels API V1 call
Details about a particular membership level	MembershipLevels API V1 call
Detailed list of common, membership, and system fields	ContactFields API V1 call
Detailed list of contacts	Contacts API V1 call, Downloading contact records using the sample Excel file
Details about a particular contact	Contacts API V1 call

To see how Wild Apricot's API works without having to write any code, you can use Wild Apricot's API V1 browser, a JavaScript application embedded in a help topic.

Using Wild Apricot's API

Wild Apricot's API is a server-side implementation that adheres to RESTful web service principles. The API can be accessed from a 3rd-party server or application. It is not designed for client-side calls. You cannot, for example, embed code in your Wild Apricot site to retrieve information from your Wild Apricot database. For information on differences between the two, see API access options.

Version 1 API calls take the form of HTML GET requests formatted in either JSON (JavaScript Object Notation) or XML (Extensible Markup Language). You can program the API calls using any programming
language you choose, including C#, Visual Basic, and PHP.

Secure access

The Wild Apricot API supports only encrypted HTTP requests – ones that begin with *https*. Insecure requests – ones that begin with *http* – are not supported.

Authentication

Each Wild Apricot API call must include authentication information that verifies your account and prevents others from accessing your data. The required authentication information – and how it is passed – differs depending on whether you are accessing the API from a 3rd party server or application, or from a Wild Apricot site page. For information on authenticating server-side access, see Authenticating API access from a 3rd-party server or application .

Versioning

The version number of the Wild Apricot API is included in the API call to allow existing applications to function after new versions are released.

In the following example, the *v1* value directs the call to version 1 of the Wild Apricot API.

```
GET https://api.wildapricot.org/v1/Accounts
```

A call to the base API – https://api.wildapricot.org – will return a list of available API versions.

Currently two version of the Wild Apricot API are available: Version 1 and Version 2. The process for authenticating accounts differs depending on the API version.

API responses

Results from Wild Apricot API calls can be returned in either JSON (JavaScript Object Notation) or XML (Extensible Markup Language) formats. The default format is JSON.

To specify the response format, include the following field in the HTTP header:

```
Accept: application/{format}
```

where *{format}* can be either *json* or *xml*.

You can compress the response by including the following field in the HTTP header:

```
Accept-Encoding: gzip, deflate
```

For more information on compressing data in server responses, see HTTP compression.

API request limits

Currently, the limits on the number API request per minute are:

- 20 requests involving multiple contacts
- 60 requests involving single contacts
- 200 other requests.

API V1 calls

API V1 calls

Wild Apricot will be discontinuing Version 1 of our API as of November 1, 2017. All Version 1 functionality is available in Version 2 of our API.

You can use the following Wild Apricot API calls to retrieve information from your Wild Apricot database.

API call	Retrieves...
Base API V1 call	A list of API versions A list of top-level API calls for a particular version
Accounts API V1 call	Details about your Wild Apricot account
MembershipLevels API V1 call	Details about your membership levels Details about a particular membership level
ContactFields API V1 call	Detailed list of common, membership, and system fields
Contacts API V1 call	Detailed list of contacts Details about a particular contact

To see how Wild Apricot's API works without having to write any code, you can use Wild Apricot's API V1 browser, a JavaScript application embedded in a help topic.

Base API V1 call

Base API V1 call

Wild Apricot will be discontinuing Version 1 of our API as of November 1, 2017. All Version 1 functionality is available in Version 2 of our API.

- Retrieving a list of API versions
- Retrieving API calls for a particular version

See also:
- API V1 browser
- API V1 calls

You can use the base API call to retrieve a list of API versions, or the next level of API calls for a particular version.

Retrieving a list of API versions

Calling the base API without specifying any further parameters will return a list of available API versions.

Syntax

```
GET https://api.wildapricot.org?apikey={APIkey}
```

where *{APIkey}* is a string of characters used to authenticate your account and prevent others from accessing your data. You can get your API key by clicking the **API key** link from the **Settings** screen. The API key can be passed as a URL parameter or as a HTTP header field.

Example:

```
GET https://api.wildapricot.org?apikey=rktud7anqouibtdm1d4yhob9dgy
```

Response fields

For each API version, the base API call retrieves the following information.

Field	Description
Version	The version number of the API.
Name	The full name of the API version.
URL	The URL of the API version. This address is the same as the call used to display a list of API calls for this version.
Deprecated	Indicates whether this version has been superseded by a newer version. Possible values are *true* and *false*.

Sample JSON response

```
[{
    "Version": 1,
    "Name": "Wild Apricot API version #1",
    "Url": "https://api.wildapricot.org/v1",
    "Deprecated": true
}]
```

Sample XML response

```
<ArrayOfApiVersion xmlns:i="http://www.w3.org/2001/XMLSchema-instance"
xmlns="http://schemas.datacontract.org/2004/07/Bonasource.MembershipFS.PublicAPI.Model
">
  <ApiVersion>
    <Deprecated>true</Deprecated>
    <Name>Wild Apricot API version #1</Name>
    <Url>https://api.wildapricot.org/v1</Url>
    <Version>1</Version>
  </ApiVersion>
</ArrayOfApiVersion>
```

Retrieving API calls for a particular version

If you add the version number to the base API call, a list of top-level API calls will be returned.

> A number of other API calls may be subordinate to the top-level call(s). For example, the MembershipLevels, ContactFields, and Contacts API calls are grouped under the Accounts API V1 call.

Syntax

```
GET https://api.wildapricot.org/{version}?apikey={APIkey}
```

Example:

```
GET https://api.wildapricot.org/v1?apikey=rktud7anqouibtdm1d4yhob9dgy
```

Parameters

The following parameters are used within the base API call to retrieve a list of API calls for a particular version of the API:

Parameter	Description
{version}	The version number of the API. You can retrieve a list of API version by calling the base API without specifying a version.
{APIkey}	String of characters used to authenticate your account and prevent others from accessing your data. You can get your API key by clicking the **API key** link from the **Settings** screen. The API key can be passed as a URL parameter or as a HTTP header field.

Response fields

For each API call, the base API call retrieves the following information.

Field	Description
Name	The full name of the API call.
URL	The URL of the API call. To view API calls nested under the returned call, run the URL.

Sample JSON response

```
{
    "Name": "Accounts",
    "Url": "https://api.wildapricot.org/v1/Accounts"
}
```

Sample XML response

```
<ArrayOfResource xmlns:i="http://www.w3.org/2001/XMLSchema-instance"
xmlns="http://schemas.datacontract.org/2004/07/Bonasource.MembershipFS.PublicAPI.Model
.V1">
  <Resource>
    <Name>Accounts</Name>
    <Url>https://api.wildapricot.org/v1/Accounts</Url>
  </Resource>
</ArrayOfResource>
```

Accounts API V1 call

Accounts API V1 call

> ⚠ Wild Apricot will be discontinuing Version 1 of our API as of November 1, 2017. All Version 1 functionality is available in Version 2 of our API.

- Syntax
- Parameters
- Response fields
- Sample JSON response
- Sample XML response

See also:

- API V1 browser
- API V1 calls

You can use the Accounts API call to retrieve details about the Wild Apricot account identified by your API key.

Syntax

```
GET https://api.wildapricot.org/{version}/Accounts?apikey={APIkey}
```

Example:

```
GET https://api.wildapricot.org/v1/Accounts?apikey=rktud7anqouibtdm1d4yhob9dgy
```

Parameters

The following parameters are used within the Accounts API call:

Variable	Description
{version}	The version number of the API. To retrieve a list of API versions, use the base API call.
{APIkey}	String of characters used to authenticate your account and prevent others from accessing your data. You can get your API key by clicking the **API key** link from the **Settings** screen. The API key can be passed as a URL parameter or as a HTTP header field.

Response fields

The Accounts API call retrieves the following information about your account.

Field	Description
Id	The account identifier. The account ID also appears on the Account and billing screen in Wild Apricot.
Name	The account name. This corresponds to the organization name as it appears on the Organization details screen.
Url	The address of the API call.
PrimaryDomainName	The primary domain name of the account.
Resources	Available API calls for this account. For each available call, the name and URL of the call is returned.

Sample JSON response


```
[{
    "Id": 58293,
    "Name": "International Association of Typographers",
    "PrimaryDomainName": "stevelivetestsite.wildapricot.org",
    "Resources": [
        {
            "Name": "Contacts",
            "Url": "https://api.wildapricot.org/v1/Accounts/58293/Contacts/"
        },
        {
            "Name": "Membership levels",
            "Url": "https://api.wildapricot.org/v1/Accounts/58293/MembershipLevels/"
        },
        {
            "Name": "Contact fields",
            "Url": "https://api.wildapricot.org/v1/Accounts/58293/ContactFields/"
        }
    ]
 }]
```


Sample XML response

```
<ArrayOfAccount xmlns:i="http://www.w3.org/2001/XMLSchema-instance"
xmlns="http://schemas.datacontract.org/2004/07/Bonasource.MembershipFS.PublicAPI.Model
.V1">
  <Account>
    <Id>58293</Id>
    <Name>International Association of Typographers</Name>
    <PrimaryDomainName>stevelivetestsite.wildapricot.org</PrimaryDomainName>
    <Resources>
      <Resource>
        <Name>Contacts</Name>
        <Url>https://api.wildapricot.org/v1/Accounts/58293/Contacts/</Url>
      </Resource>
      <Resource>
        <Name>Membership levels</Name>
        <Url>https://api.wildapricot.org/v1/Accounts/58293/MembershipLevels/</Url>
      </Resource>
      <Resource>
        <Name>Contact fields</Name>
        <Url>https://api.wildapricot.org/v1/Accounts/58293/ContactFields/</Url>
      </Resource>
    </Resources>
  </Account>
</ArrayOfAccount>
```


ContactFields API V1 call

ContactFields API V1 call

Wild Apricot will be discontinuing Version 1 of our API as of November 1, 2017. All Version 1 functionality is available in Version 2 of our API.

- Syntax
- Parameters
- Response fields
- Sample JSON response
- Sample XML response

See also:

- API V1 browser
- API V1 calls

You can use the ContactFields API call to retrieve a detailed list of the common and membership fields in your Wild Apricot database, and well as additional system fields. Any of the fields returned by the ContactFields API call can be used to filter the results of the Contacts API V1 call.

Syntax

```
GET
https://api.wildapricot.org/{version}/Accounts/{accountID}/ContactFields?apikey={APIke
y}
```

Example:

```
GET
https://api.wildapricot.org/v1/Accounts/58293/ContactFields?apikey=rktud7anqouibtdm1d4
yhob9dgy
```

Parameters

The following parameters are used within the ContactFields API call:

Variable	Description
{version}	The version number of the API. To retrieve a list of API versions, use the base API call.
{accountID}	The account identifier that appears on the Account and billing screen and is returned by the Accounts API V1 call.
{APIkey}	String of characters used to authenticate your account and prevent others from accessing your data. You can get your API key by clicking the **API key** link from the **Settings** screen. The API key can be passed as a URL parameter or as a HTTP header field.

Response fields

For each common and membership field in your Wild Apricot database, the ContactFields API call retrieves the following information.

Field	Description
FieldName	The name of the field.
Type	The field type. Possible values and the corresponding field types as they appear in Wild Apricot are: *String* – text, multiline text *Number* – various system fields *Boolean* – rules and terms, various system fields *DateTime* – date *Choice* – radio buttons, dropdown, radio buttons with extra charge *MultipleChoice* – multiple choice, multiple choice with extra charge
IsSystem	Whether the field is a system field. Possible values are *true* or *false*.
Access	The access setting for the field. Possible values are *AdminOnly*, *Mem ber*, and *Public*.
FieldInstructions	Any field instructions that have been entered for the field.
Description	The description that appears for system fields.
AllowedValues	For multi-option fields – those with a field **Type** of *Choice* (radio buttons, dropdown, extra charges radio buttons) or *MultipleChoice* (m ultiple choice, extra charge multiple choice) – the ID and label of each individual option is returned. You can use either the option ID or option label within your filter criteria when retrieving contact records using the Contacts API V1 call.

Information is also retrieved for the following system fields:

Field	Description	Type	Possible values

Archived	Indicates whether the contact record is archived.	Boolean	true, false
Access to profile by others	Indicates whether the **Show profile** option is enabled in this member's privacy settings.	Boolean	true, false
Balance	The current balance outstanding for this contact. If there is a balance due, then the value of this field will be negative.	Number	Any integer (positive or negative)
Creation date	The date and time the contact record was created.	DateTime	Any date using the format dd/mm/yyyy hh:mm:ss AM/PM
Donor	Indicates whether the contact has made at least one donation.	Boolean	true, false
Email delivery disabled	Indicates whether email delivery is disabled for this contact, either because no email address was specified or the delivery of emails was disabled.	Boolean	true, false
Event announcements	Indicates whether event announcements are enabled within the contact's email preferences.	Boolean	true, false
Event attendee	Indicates whether the contact has registered for at least one event.	Boolean	true, false
Group participation	The names of the member groups to which the member belongs. Multiple groups are separated by commas within the ContactFields API results. When using this field to filter results from the Contacts API V1 call, you can reference only one group at a time, though you can reference multiple groups separately then join the multiple criteria using logical operators (AND, OR).	String	Group name(s)
Last login date	The date and time the contact last logged in to their account. If the contact has never logged in, then the value of this field will be null.	DateTime	Any date using the format dd/mm/yyyy hh:mm:ss AM/PM
Level last changed	The date and time the contact's membership level was last changed. If the level has never been changed, then the value of this field will be null.	DateTime	Any date using the format dd/mm/yyyy hh:mm:ss AM/PM
Member	Indicates whether the contact is a member.	Boolean	true, false

Member emails and newsletters	Indicates whether manually sent emails are enabled within the contact's email preferences.	Boolean	true, false
Member ID	The ID of the contact as displayed on their contact record .	Number	Any integer
Member role	Indicates whether the contact is an individual member, a bundle member, or a bundle administrator.	String	BundleAdministrator, BundleMember, Individual
Member since	The date and time that the contact became a member.	DateTime	Any date using the format dd/mm/yyyy hh:mm:ss AM/PM
Membership level ID	The identifier of the membership level assigned to the contact (if any).	Number	Any integer
Membership status	The status of the contact's membership.	Choice	Active, Lapsed, PendingNew, PendingRenewal, PendingUpgrade
Notes	Any notes added to the contact's record.	String	Any alphanumeric characters
Profile last updated	The date and time that common fields, membership fields, or member group participation were last updated for the contact.	DateTime	Any date using the format dd/mm/yyyy hh:mm:ss AM/PM
Receiving emails disabled	Indicates whether the delivery of all emails was disabled from the contact's email preferences.	Boolean	true, false
Registered for specific event	Indicates whether the contact has registered for the specified event. The event can be specified as part of the filter criteria when filtering the results of the Contacts API V1 call.		
Renewal due	The date and time of the member's next renewal date.	DateTime	Any date using the format dd/mm/yyyy hh:mm:ss AM/PM
Renewal date last changed	The date and time the member's renewal date was last changed. If the date has never been changed, then the value of this field will be null.	DateTime	Any date using the format dd/mm/yyyy hh:mm:ss AM/PM
Suspended member	Indicates whether the contact is a suspended member.	Boolean	true, false
Total donated	The total value of all donations made by this contact.	Number	Any integer

Sample JSON response


```
[{
    "FieldName": "Member ID",
    "Type": "Number",
```

```
    "IsSystem": true,
    "Access": "AdminOnly",
    "FieldInstructions": "",
    "Description": "This is a read-only system field used to uniquely identify the
member or contact."
},
{
    "FieldName": "e-Mail",
    "Type": "String",
    "IsSystem": true,
    "Access": "AdminOnly",
    "FieldInstructions": "",
    "Description": "This is a system field (email).   It is mandatory for online
self-service transactions and cannot be deleted."
},
{
    "FieldName": "Status",
    "Type": "Choice",
    "IsSystem": true,
    "Access": "AdminOnly",
    "AllowedValues": [
        {
            "Id": 1,
            "Label": "Active"
        },
        {
            "Id": 2,
            "Label": "Lapsed"
        },
        {
            "Id": 20,
            "Label": "PendingNew"
        },
        {
            "Id": 3,
            "Label": "PendingRenewal"
        },
        {
            "Id": 30,
            "Label": "PendingUpgrade"
        }
    ],
    "Description": "Status"
},
{
    "FieldName": "Country (Selection)",
    "Type": "Choice",
    "IsSystem": false,
    "Access": "AdminOnly",
    "AllowedValues": [
        {
            "Id": 295,
            "Label": "Russia"
        },
        {
            "Id": 296,
            "Label": "Canada"
        },
        {
```

```
        "Id": 297,
        "Label": "USA"
    }
```

```
    ]
}]
```

Sample XML response


```
<ArrayOfContactFieldDescription xmlns:i="http://www.w3.org/2001/XMLSchema-instance"
xmlns="http://schemas.datacontract.org/2004/07/Bonasource.MembershipFS.PublicAPI.Model
.V1">
  <ContactFieldDescription>
    <Access>AdminOnly</Access>
    <AllowedValues i:nil="true" />
    <Description>This is a read-only system field used to uniquely identify the member
or contact.</Description>
    <ExistsInLevels i:nil="true" />
    <FieldInstructions>
    </FieldInstructions>
    <FieldName>Member ID</FieldName>
    <IsSystem>true</IsSystem>
    <Type>Number</Type>
  </ContactFieldDescription>
  <ContactFieldDescription>
    <Access>AdminOnly</Access>
    <AllowedValues i:nil="true" />
    <Description>This is a system field (email).   It is mandatory for online
self-service transactions and cannot be deleted.</Description>
    <ExistsInLevels i:nil="true" />
    <FieldInstructions>
    </FieldInstructions>
    <FieldName>e-Mail</FieldName>
    <IsSystem>true</IsSystem>
    <Type>String</Type>
  </ContactFieldDescription>
  <ContactFieldDescription>
    <Access>AdminOnly</Access>
    <AllowedValues>
      <ListItem>
        <Id>1</Id>
        <Label>Active</Label>
      </ListItem>
      <ListItem>
        <Id>2</Id>
        <Label>Lapsed</Label>
      </ListItem>
      <ListItem>
        <Id>20</Id>
        <Label>PendingNew</Label>
      </ListItem>
      <ListItem>
        <Id>3</Id>
        <Label>PendingRenewal</Label>
      </ListItem>
      <ListItem>
        <Id>30</Id>
        <Label>PendingUpgrade</Label>
      </ListItem>
    </AllowedValues>
```

```
    <Description>Status</Description>
    <ExistsInLevels i:nil="true" />
    <FieldInstructions i:nil="true" />
    <FieldName>Status</FieldName>
    <IsSystem>true</IsSystem>
    <Type>Choice</Type>
  </ContactFieldDescription>
  <ContactFieldDescription>
    <Access>AdminOnly</Access>
    <AllowedValues>
      <ListItem>
        <Id>295</Id>
        <Label>Russia</Label>
      </ListItem>
      <ListItem>
        <Id>296</Id>
        <Label>Canada</Label>
      </ListItem>
      <ListItem>
        <Id>297</Id>
        <Label>USA</Label>
      </ListItem>
    </AllowedValues>
    <Description i:nil="true" />
    <ExistsInLevels i:nil="true" />
    <FieldInstructions i:nil="true" />
    <FieldName>Country (Selection)</FieldName>
    <IsSystem>false</IsSystem>
    <Type>Choice</Type>
```

```
  </ContactFieldDescription>
</ArrayOfContactFieldDescription>
```

Contacts API V1 call

Contacts API V1 call

Wild Apricot will be discontinuing Version 1 of our API as of November 1, 2017. All Version 1 functionality is available in Version 2 of our API.

See also:

- Downloading contact records using the supplied Excel file
- API browser
- API calls

You can use the Contacts API call to retrieve a detailed list of contacts, or details about a particular contact.

Responses to the Contacts API call can be filtered so that only those records that match the filter criteria will be returned. Filtering your search results can significantly reduce server response time. For more information, see Filtering API responses (below).

You can also control which fields are included in the results. For more information, see Selecting API response fields (below).

Retrieving information for a specific contact

The syntax for retrieving information about a specific contact is show below:

```
GET
https://api.wildapricot.org/{version}/Accounts/{accountID}/Contacts/{contactID}?apikey
={APIkey}
```

Example:

```
GET
https://api.wildapricot.org/v1/Accounts/58293/Contacts/402784?apikey=rktud7anqouibtdm1
d4yhob9dgy
```

Retrieving information for all contacts

Retrieving information for all contacts is a two-stage process. First, you submit the search request as a Contacts API call and receive a result ID, as shown in the sample JSON code below.

```
{
    "ResultId": "ecbe4c97-f0bd-4dfb-a251-a9eeb196e637",
    "ResultUrl":
"https://api.wildapricot.org/v1/accounts/58293/Contacts/?resultId=ecbe4c97f0bd4dfba251
a9eeb196e637",
    "Requested": "2013-07-02T18:32:42.6450398+04:00",
    "State": "Waiting",
    "InitialQuery": {
        "ObjectType": "Contact",
        "FilterExpression": null,
        "SelectExpression": null
    }
}
```

Then, you pass the result ID as a parameter in a second Contacts API call. In response to the second API call, the server will return the search results.

Retrieving a complete list of your contacts can be an intensive process, so only one Contacts API call can be processed at a time. If multiple requests are received from the same account, they will be processed in the order in which they were received.

Search request syntax

```
GET
https://api.wildapricot.org/{version}/Accounts/{accountID}/Contacts?apikey={APIkey}
```

Example:

```
GET
https://api.wildapricot.org/v1/Accounts/58293/Contacts?apikey=rktud7anqouibtdm1d4yhob9
dgy
```

Results request syntax

```
GET
https://api.wildapricot.org/{version}/Accounts/{accountID}/Contacts?resultId={resultID
}&apikey={APIkey}
```

Example:

```
GET
https://api.wildapricot.org/v1/Accounts/58293/Contacts?resultId=ecbe4c97f0bd4dfba251a9
eeb196e637&apikey=rktud7anqouibtdm1d4yhob9dgy
```

Parameters

The following parameters are used within the Contacts API call:

Variable	Description

{version}	The version number of the API. To retrieve a list of API versions, use the base API call.
{accountID}	The account identifier that appears on the Account and billing screen and is returned by the Accounts API call.
{contactID}	The ID of a contact. The contact ID is displayed in Wild Apricot on the contact record. You can retrieve a list of contact IDs by calling the Contacts API without specify a {contactID}.
{APIkey}	String of characters used to authenticate your account and prevent others from accessing your data. You can get your API key by clicking the **API key** link from the **Settings** screen. The API key can be passed as a URL parameter or as a HTTP header field.
{resultID}	The result identifier returned by the first Contacts API call. The identifier is passed as a parameter – with or without dashes – during the second Contacts API call.

The following parameters are optional:

Variable	Description	For more information, see...
$filter	Filters the results of the Contacts API call so that only those records that match the filter criteria are included.	Filtering API results
$select	Controls which fields are returned in the Contacts API call.	Selecting API response fields

Response fields

Search request

In the first and second stages of the contact search, the Contacts API returns the following information regarding the search request.

Field	Description
ResultId	The search request identifier. The identifier is passed as a parameter during the second Contacts API call.
ResultUrl	The address of the API call for the second Contacts API call – the results request.
Requested	The date and time the search request was submitted.
Processed	The date and time the search request was processed.
State	The state of the search request. Possible values are: • *Waiting* – the first stage in the process is complete, and the second stage has not yet been initiated. • *Processing* – the results request (from the second Contacts API call) has been submitted but the results have not yet been returned. • *Complete* – the search results have been successfully retrieved. • *Failed* – the search request has failed.

InitialQuery	The details of any $filter or $select parameters passed as part of the search request. The $filter parameter is used to filter the search results so that only those records that match the filter criteria will be returned. The $select parameter is used to control which fields are included in the results.

Search results

In the second stage of the contact search, the Contacts API returns the following information for each contact.

Field	Description
Id	The ID of the contact as displayed on their contact record.
Url	The address of the API call for this contact.
FirstName	The contact's first name.
LastName	The contact's last name.
EMail	The contact's email address.
ProfileLastUpdated	The date and time that common fields, membership fields, or member group participation were last updated for the contact.
MembershipLevel	The name and URL of the membership level assigned to the contact. If the contact is not a member, then the MembershipLevel field is not included in the results.
Status	The status of the contact's membership. Possible values are *Active*, *Lapsed*, *PendingNew*, *PendingRenewal*, and *PendingUpgrade*. The status is only included in the results if the contact is a member.
FieldValues	For each custom field you have added to your Wild Apricot database, the name of the field and its value for this contact are returned. As well, a number of system fields are returned. If a custom field is restricted to certain access levels, then CustomAccessLevel indicates the level to which the field is restricted. Possible values are *AdminOnly*, *Member*, and *Public*.

Sample JSON response


```
{
    "Contacts": [
        {
            "Id": 351892,
            "Url": "https://api.wildapricot.org/v1/accounts/58293/Contacts/351892",
            "FirstName": "Steve",
            "LastName": "Andrews",
            "EMail": "steve@wildapricot.com",
            "ProfileLastUpdated": "2013-01-23T07:58:03",
            "FieldValues": [
                {
                    "FieldName": "Job title",
                    "Value": "Font designer"
                },
                {
                    "FieldName": "Organization",
                    "Value": "IAT"
                    "CustomAccessLevel": "AdminOnly"
                },
```

```
                {
                    "FieldName": "State/Prov",
                    "Value": "New York"
                }
            ]
        },
        {
            "Id": 402784,
            "Url": "https://api.wildapricot.org/v1/accounts/58293/Contacts/402784",
            "FirstName": "Carly",
            "LastName": "Rose",
            "EMail": "crose@mail.com",
            "ProfileLastUpdated": "2013-06-24T07:58:03",
            "MembershipLevel": {
                "Url": "/v1/accounts/1/MembershipLevels/16419"
                "Name": "Silver"
            },
            "Status": "Active",
            "FieldValues": [
                {
                    "FieldName": "Job title",
                    "Value": "Graphic designer"
                },
                {
                    "FieldName": "Organization",
                    "Value": "IAT"
                    "CustomAccessLevel": "AdminOnly"
                },
                {
                    "FieldName": "State/Prov",
                    "Value": "California"
                }
            ]
        }
    ],
    "ResultId": "ecbe4c97-f0bd-4dfb-a251-a9eeb196e637",
    "ResultUrl":
"https://api.wildapricot.org/v1/accounts/58293/Contacts/?resultId=ecbe4c97f0bd4dfba251
a9eeb196e637",
    "Requested": "2013-07-02T19:04:58.51",
    "Processed": "2013-07-02T19:05:39.51",
    "State": "Complete",
    "InitialQuery": {
        "ObjectType": "Contact",
        "FilterExpression": null,
        "SelectExpression": null
```

```
    }
}
```

Sample XML response


```
<AsyncResult
xmlns="http://schemas.datacontract.org/2004/07/Bonasource.MembershipFS.PublicAPI.Model
.V1" xmlns:i="http://www.w3.org/2001/XMLSchema-instance" i:type="AsyncContactsResult">
   <ErrorDetails i:nil="true" />
   <InitialQuery>
      <FilterExpression i:nil="true" />
      <ObjectType>Contact</ObjectType>
      <SelectExpression i:nil="true" />
   </InitialQuery>
   <Processed>2013-07-02T19:05:39.51</Processed>
   <Requested>2013-07-02T19:04:58.51</Requested>
   <ResultId>ecbe4c97-f0bd-4dfb-a251-a9eeb196e637</ResultId>

<ResultUrl>https://api.wildapricot.org/v1/accounts/58293/Contacts/?resultId=ecbe4c97f0
bd4dfba251a9eeb196e637</ResultUrl>
   <State>Complete</State>
   <Contacts>
      <Contact>
         <EMail>steve@wildapricot.com</EMail>
         <FieldValues>
            <ContactField>
               <CustomAccessLevel i:nil="true" />
               <FieldName>Organization</FieldName>
               <Value xmlns:d6p1="http://www.w3.org/2001/XMLSchema"
i:type="d6p1:double">IAT</Value>
            </ContactField>
            <ContactField>
               <FieldName>State/Prov</FieldName>
               <Value xmlns:d6p1="http://www.w3.org/2001/XMLSchema"
i:type="d6p1:string">New York</Value>
            </ContactField>
            <ContactField>
               <FieldName>Job title</FieldName>
               <Value xmlns:d6p1="http://www.w3.org/2001/XMLSchema"
i:type="d6p1:string">Font designer</Value>
            </ContactField>
         </FieldValues>
         <FirstName>Steve</FirstName>
         <Id>351892</Id>
         <LastName>Andrews</LastName>
         <ProfileLastUpdated>2013-01-23T07:58:03</ProfileLastUpdated>
         <Url>https://api.wildapricot.org/v1/accounts/58293/Contacts/351892</Url>
      </Contact>
      <Contact>
         <EMail>crose@mail.com</EMail>
         <FieldValues>
            <ContactField>
               <CustomAccessLevel i:nil="true" />
               <FieldName>Organization</FieldName>
               <Value xmlns:d6p1="http://www.w3.org/2001/XMLSchema"
i:type="d6p1:double">IAT</Value>
```

```
            </ContactField>
            <ContactField>
               <FieldName>State/Prov</FieldName>
               <Value xmlns:d6p1="http://www.w3.org/2001/XMLSchema"
i:type="d6p1:string">California</Value>
            </ContactField>
            <ContactField>
               <FieldName>Job title</FieldName>
               <Value xmlns:d6p1="http://www.w3.org/2001/XMLSchema"
i:type="d6p1:string">Graphic designer</Value>
            </ContactField>
         </FieldValues>
         <FirstName>Carly</FirstName>
         <Id>402784</Id>
         <LastName>Rose</LastName>
         <ProfileLastUpdated>2013-06-24T07:58:03</ProfileLastUpdated>
         <MembershipLevel i:nil="true" />
         <Status i:nil="true" />
         <Url>https://api.wildapricot.org/v1/accounts/58293/Contacts/402784</Url>
      </Contact>
```

```
   </Contacts>
</AsyncResult>
```

Filtering API results

You can filter the results of the Contacts API call so that only those records that match the filter criteria will be included. You could, for example, you might want to retrieve only those contact records that have been added or updated after a certain date.

> Filtering your search results can significantly reduce server response time.

You can filter using any field returned by the ContactFields API call. Within your filter criteria, you can use relational operators to include ranges of contacts, and use logical operators to combine multiple critieria.

$filter syntax

```
GET
https://api.wildapricot.org/{version}/Accounts/{accountID}/Contacts?apikey={APIkey}&$f
ilter={filterCriteria}
```

where *{filterCriteria}* is the criteria to be used to filter the search results.

Example:

```
GET
https://api.wildapricot.org/v1/Accounts/58293/Contacts?apikey=rktud7anqouibtdm1d4yhob9
dgy&$filter=Balance gt 100
```

In this example, only contacts whose balance is greater than 100 will be included in the search results.

Relational operators

You can use the following relational operators within your search criteria.

Operator	Description	Field types	Example
eq	Equal to	All	$filter='State/Prov' eq 'California'
ne	Not equal to	All	$filter=Organization ne 'Microsoft'
gt	Greater than	Number, DateTime	$filter=Balance gt 100
ge	Great than or equal to	Number, DateTime	$filter='Member since' ge 2010-01-01
lt	Less than	Number, DateTime	$filter='Total donated' lt 100
le	Less than or equal to	Number, DateTime	$filter='Renewal due' le 2013-08-25
substringof	Field includes specified value using the following format: substringof('value', 'field')	String	$filter=substringof('Designer', 'Job title') eq true

Field names that include spaces or special characters (such as ? < &) must be enclosed within single quotation marks.

Using the NULL constant, you can include or exclude contacts based on whether a particular field does or does not have a value. For example, if you wanted to include only contacts with a specified job title, the filter criteria might look something like this:

```
$filter='Job title' ne NULL
```

When specifying a value for date fields, you must use the *yyyy-mm-dd* date format, as shown in the following example:

```
$filter='Profile last updated' ge 2013-06-25
```

Logical operators

You can use logical operators – AND and OR – to group multiple search criteria, and control whether either or both criteria must satisfied.

In the following example...

```
$filter='State/Prov' eq 'California' AND Organization eq 'Google'
```

...contacts must reside in California **and** work for Google to be included in the search results.

In this example...

```
$filter=Total donated'gt 500 OR 'Member since' ge 2010-01-01
```

...contacts will included in the search results if they have donated more than $500 **or** if they have been members since January 1, 2010.

You can use brackets to control *precedence* – the order in which multiple criteria are evaluated within your search criteria. Normally, criteria joined by an AND operator are evaluated ahead of criteria joined by an OR operator. However, any criteria surrounded by brackets will be given priority and evaluated ahead of any other criteria.

In the following example....

```
$filter=A and B or C
```

...contacts would have to satisfy both the A and B criteria – or satisfy the C criteria alone – to be included in the results. If, however, you place brackets as shown here...

```
$filter=A and (B or C)
```

...then contacts would have to satisfy either the B or C criteria, as well as the A criteria.

Filtering using multi-option fields

When filtering using multi-option fields, you can reference individual choices using either the option ID or the option label.

Multi-option fields include those with a field type of *Choice* (radio buttons, dropdown, radio buttons with extra charge) or *MultipleChoice* (multiple choice, multiple choice with extra charge).

For each field, the field type is returned by the ContactFields API call. For multi-option fields, the ID and label is returned for each field as well under **AllowedValues**.

In the following example, a dropdown **Membership status** field has values of either *Active*, *Lapsed*, *PendingNew*, or *PendingRenewal*.

```
"FieldName": "Membership status",
"Type": "Choice",
"IsSystem": true,
"Access": "AdminOnly",
"AllowedValues": [
    {
        "Id": 1,
        "Label": "Active"
    },
    {
        "Id": 2,
        "Label": "Lapsed"
    },
    {
        "Id": 20,
        "Label": "PendingNew"
    },
    {
        "Id": 3,
        "Label": "PendingRenewal"
    }

  ]
```

If you wanted to limit search results to contacts with a **Membership status** of *Lapsed*, you could use either the option ID of *2*, or the option label of *Lapsed*. To indicate whether you are referencing the option using the ID or the label, you include a suffix of either *.Id* or *.Label* following the field name. To limit search results to contacts with a **Membership status** of *Lapsed* using the option ID, your filter criteria would appear as follows:

```
$filter='Membership status.Id' eq 2
```

To limit search results using the label ID, your filter criteria would look like this:

If the field name contains spaces or special characters, you must enclose the field name and the suffix within quotation marks. For example:

```
$filter='Optional extras.Label' eq ‘Newsletter’
```

Selecting API response fields

Using the $select parameter, you can control which fields are returned by the Contacts API call.

$select syntax

```
GET
https://api.wildapricot.org/{version}/Accounts/{accountID}/Contacts?apikey={APIkey}&$s
elect={fieldlist}
```

where *{fieldlist}* is a list of fields to be included in the results. When you use the $parameter, only fields specified by the parameter will be included in the search results.

Example:

```
GET
https://api.wildapricot.org/v1/Accounts/58293/Contacts?apikey=rktud7anqouibtdm1d4yhob9
dgy&$select='Member ID', 'Membership status', 'First name', 'Last name'
```

The field names correspond to the fields returned by the ContactFields API call, not the field names that appear in Wild Apricot. Multiple field names are separated by commas, and field names with spaces or special characters are enclosed in single quotation marks.

MembershipLevels API V1 call

MembershipLevels API V1 call

Wild Apricot will be discontinuing Version 1 of our API as of November 1, 2017. All Version 1 functionality is available in Version 2 of our API.

- Syntax
- Parameters
- Response fields
- Sample JSON response
- Sample XML response

See also:
- API V1 browser
- API V1 calls

You can use the MembershipLevels API call to retrieve details about all your membership levels, or just one membership level in particular.

Syntax

For all membership levels

```
GET
https://api.wildapricot.org/{version}/Accounts/{accountID}/MembershipLevels?apikey={AP
Ikey}
```

Example:

```
GET
https://api.wildapricot.org/v1/Accounts/58293/MembershipLevels?apikey=rktud7anqouibtdm
1d4yhob9dgy
```

For a particular membership level

```
GET
https://api.wildapricot.org/{version}/Accounts/{accountID}/MembershipLevels/{levelID}?
apikey={APIkey}
```

Example:

```
GET
https://api.wildapricot.org/v1/Accounts/58293/MembershipLevels/257271?apikey=rktud7anq
ouibtdm1d4yhob9dgy
```

Parameters

The following parameters are used within the MembershipLevels API call:

Variable	Description
{version}	The version number of the API. To retrieve a list of API versions, use the base API call.
{accountID}	The account identifier that appears on the Account and billing screen and is returned by the Accounts API V1 call.
{levelID}	The ID of a membership level. You can retrieve a list of membership level IDs by calling the MembershipLevels API without specify a level ID.
{APIkey}	String of characters used to authenticate your account and prevent others from accessing your data. You can get your API key by clicking the **API key** link from the **Settings** screen. The API key can be passed as a URL parameter or as a HTTP header field.

Response fields

The MembershipLevels API call retrieves the following information about your membership levels.

Field	Description
Id	The identifier for the membership level.
Url	The address of the API call for this membership level.
Name	The level name as it appears on the **General** tab of the Membership level detail screen.
Description	The description of the level as it appears on the **General** tab of the Membership level detail screen.
PublicCanApply	Indicates whether the **Public can apply** option has been enabled for this level. Possible values are *true* and *false*.
Type	Indicates whether the membership level is an individual level or a bundle level. Possible values are *Individual* and *Bundle*.
MembershipFee	The membership fee for this level.
MemberCanChangeToLevels	Lists the membership levels that members on this level can change to.
BundleMembersLimit	For bundle membership levels, this indicates the bundle member limit. For individual membership levels, the value is *0*.
RenewalPeriod	Contains fields that correspond to options that appear on the Renewal policy tab on the Membership level detail screen.
Kind	Indicates the renewal period for the membership level. Possibles values are *Never*, *Monthly*, *TwiceAYear*, *Quarterly*, and *EveryNYears*.

StartFromJoinDate	For renewal periods of every *x* number of years – where the value for **Kind** is *EveryNYears* – StartFromJoinDate indicates whether the **Join date** option was selected, so that renewal takes place on the join date. Possible values are *true* and *false*.
Dates	Where the value for **Kind** is *EveryNYears* and **StartFromJoinDate** equals *false*, values will appear in **Month** and **Day** fields to indicate the specified renewal date.
YearPeriod	For renewal periods of every *x* number of years, YearPeriod indicates the number of years between renewals.
AutomaticRecurringPayments	Indicates whether automatic recurring payments have been enabled for this level. Possible values are *true* and *false*.
ApplicationReview	Contains fields that correspond to options that appear on the New applications tab on the Membership level detail screen.
AdminApprovalRequired	Indicates whether administrator approval is required before a new membership is activated. Possible values are *true* and *false*.
PrepayRequired	Indicates whether payment must be received before a new membership is activated. Possible values are *true* and *false*.

Sample JSON response

```
{
    "Id": 257271,
    "Url": "https://api.wildapricot.org/v1/accounts/58293/MembershipLevels/257271",
    "Name": "Premium",
    "Description": null,
    "PublicCanApply": true,
    "Type": "Individual",
    "MembershipFee": 50,
    "BundleMembersLimit": 0,
    "MemberCanChangeToLevels": [
        {
            "Id": 264,
            "Url":
"https://api.wildapricot.org/v1/accounts/58293/MembershipLevels/264"
        },
        {
            "Id": 9026,
            "Url":
"https://api.wildapricot.org/v1/accounts/58293/MembershipLevels/9026"
        },
        {
            "Id": 31,
            "Url": "https://api.wildapricot.org/v1/accounts/58293/MembershipLevels/31"
        }
    ],
    "RenewalPeriod": {
        "Kind": "EveryNYears",
        "StartFromJoinDate": false,
        "Dates": [
            {
                "Month": 1,
                "Day": 1
            }
        ],
        "YearPeriod": 1
    },
    "AutomaticRecurringPayments": false,
    "ApplicationReview": {
        "AdminApprovalRequired": true,
        "PrepayRequired": true
    }
}
```


Sample XML response

```xml
<MembershipLevel xmlns:i="http://www.w3.org/2001/XMLSchema-instance"
xmlns="http://schemas.datacontract.org/2004/07/Bonasource.MembershipFS.PublicAPI.Model
.V1">
  <ApplicationReview>
    <AdminApprovalRequired>true</AdminApprovalRequired>
    <PrepayRequired>true</PrepayRequired>
  </ApplicationReview>
  <AutomaticRecurringPayments>false</AutomaticRecurringPayments>
  <BundleMembersLimit>0</BundleMembersLimit>
  <Description i:nil="true" />
  <Id>257271</Id>
  <MemberCanChangeToLevels>
    <LinkedResourceOflong>
      <Id>264</Id>
      <Url>https://api.wildapricot.org/v1/accounts/58293/MembershipLevels/264</Url>
    </LinkedResourceOflong>
    <LinkedResourceOflong>
      <Id>9026</Id>
      <Url>https://api.wildapricot.org/v1/accounts/58293/MembershipLevels/9026</Url>
    </LinkedResourceOflong>
    <LinkedResourceOflong>
      <Id>31</Id>
      <Url>https://api.wildapricot.org/v1/accounts/58293/MembershipLevels/31</Url>
    </LinkedResourceOflong>
  </MemberCanChangeToLevels>
  <MembershipFee>50.0000</MembershipFee>
  <Name>Premium</Name>
  <PublicCanApply>true</PublicCanApply>
  <RenewalPeriod>
    <Dates>
      <DayOfYear>
        <Day>1</Day>
        <Month>1</Month>
      </DayOfYear>
    </Dates>
    <Kind>EveryNYears</Kind>
    <StartFromJoinDate>false</StartFromJoinDate>
    <YearPeriod>1</YearPeriod>
  </RenewalPeriod>
  <Type>Individual</Type>
  <Url>https://api.wildapricot.org/v1/accounts/1/MembershipLevels/257271</Url>
</MembershipLevel>
```


API V1 status codes

API V1 status codes

Along with the results of an API call, Wild Apricot's API returns a status code indicating the state of the requested operation. The status codes are standard HTTP status codes and include the following.

Code	Description
200	Wild Apricot's server has successfully responded to the request.
304	You have requested previously supplied information, so the information is being returned from the cache rather than the server.

400	Wild Apricot's server did not understand the request. You may have used improper syntax in your $filter or $select parameters.
401	The API key required to authenticate your account was either not provided or not valid.
403	Your authentication information was correct, but access to requested resource is denied, possibly because the resource ID you provided was not valid.
404	The resource you are trying to access either does not exist or is not available.
404.14	Your API call is too long for the server to process. The maximum query length is 4096 characters.
429	Wild Apricot's server has received too many requests from your account. Currently, accounts are limited to a certain number of requests per minute to avoid overall system slowdown.
500	Wild Apricot's server has encountered an error and cannot fulfill the request.
503	Wild Apricot's server is currently unavailable because it is overloaded or down for maintenance.

API V1 browser

API V1 browser

To use the API browser, enter your API key in **API key** field, then click the **Load** button.

You can use the tabs that appear to switch between the JSON and XML results. Within the JSON results, you can click the links to execute the available API calls. Alternatively, you can enter the API call URL into the field below then click **GO**.

Sample API program

Sample API program

The code below is from a sample program written in C# (target .NET 4.5) to download and display contact records using Wild Apricot's API. The program uses the Newtonsoft.Json assembly. To run the program, you need to set CONST_ApiKey to your actual API key. To download the source code, click here.

```
namespace PublicAPI.Samples
{
    using System;
    using System.IO;
    using System.Net;
    using Newtonsoft.Json;

    class Program
    {
        private const string CONST_ApiKey = "123456"; // change this value to your
actual API key
        private const string CONST_BaseUrl = "https://api.wildapricot.org/";

        private static string AccountId;

        static void Main(string[] args)
        {
            ConnectToEntryPoint();
            LoadVersionResources();
```

```
            LoadAccounts();
            LoadContactFields();
            LoadMembershipLevels();
            LoadContacts();

            Console.WriteLine("Press any key to exit...");
            Console.ReadKey();
        }



        /// <summary>
        /// This helper method retrieves data from API and parses it to dynamic
object.
        /// </summary>
        private static dynamic LoadObject(string url)
        {
            object result;
            var client = new WebClient();
            client.Headers.Add(HttpRequestHeader.Accept, "application/json");
            client.Headers.Add("APIKey", CONST_ApiKey);

            var stream = client.OpenRead(url);
            using (var reader = new StreamReader(stream))
            {
                var str = reader.ReadToEnd();
                result = JsonConvert.DeserializeObject(str);
            }
            return result as dynamic;
        }

        public static void ConnectToEntryPoint()
        {
            Console.WriteLine();
            Console.WriteLine("Connecting to API entry point");
            var entryPointResources = LoadObject(CONST_BaseUrl);
            foreach (var resource in entryPointResources)
            {
                Console.WriteLine("Version:" + resource.Version);
                Console.WriteLine("Name:" + resource.Name);
                Console.WriteLine("Url:" + resource.Url);
            }
        }

        public static void LoadVersionResources()
        {
            Console.WriteLine();
            Console.WriteLine("Loading version resources");

            var versionResources = LoadObject(CONST_BaseUrl + "/v1");
            foreach (var resource in versionResources)
            {
                Console.WriteLine("Name:" + resource.Name);
                Console.WriteLine("Url:" + resource.Url);
            }
        }

        public static void LoadAccounts()
        {
```

```
            Console.WriteLine();
            Console.WriteLine("Loading account info");

            var accounts = LoadObject(CONST_BaseUrl + "/v1/accounts");
            foreach (var account in accounts)
            {
                Console.WriteLine("Id:" + account.Id);
                Console.WriteLine("Url:" + account.Url);
                Console.WriteLine("Name:" + account.Name);
                Console.WriteLine("PrimaryDomainName:" + account.PrimaryDomainName);

                AccountId = account.Id.ToString();

                Console.WriteLine("Resources");
                foreach (var resource in account.Resources)
                {
                    Console.WriteLine("  Name:" + resource.Name);
                    Console.WriteLine("  Url:" + resource.Url);
                    Console.WriteLine("  ------");
                }
            }
        }

        public static void LoadContactFields()
        {
            Console.WriteLine();
            Console.WriteLine("Loading contact fields description");

            var url = string.Format("{0}/v1/accounts/{1}/ContactFields/",
CONST_BaseUrl, AccountId);
            var contactFields = LoadObject(url);

            foreach (var contactField in contactFields)
            {
                Console.WriteLine("FieldName:" + contactField.FieldName);
                Console.WriteLine("Type:" + contactField.Type);
                Console.WriteLine("Description:" + contactField.Description);
                Console.WriteLine("FieldInstructions:" +
contactField.FieldInstructions);

                if (contactField.AllowedValues != null)
                {
                    Console.WriteLine("Allowed values");
                    foreach (var allowedValue in contactField.AllowedValues)
                    {
                        Console.WriteLine("  Id: {0}, Label: {1}", allowedValue.Id,
allowedValue.Label);
                    }
                }
                Console.WriteLine("------");
            }
        }

        public static void LoadMembershipLevels()
        {
            Console.WriteLine();
            Console.WriteLine("Loading membership levels");

            var url = string.Format("{0}/v1/accounts/{1}/MembershipLevels/",
```

```
CONST_BaseUrl, AccountId);
            var levels = LoadObject(url);

            foreach (var level in levels)
            {
                Console.WriteLine("Id:" + level.Id);
                Console.WriteLine("Name:" + level.Name);
                Console.WriteLine("Type:" + level.Type);
                Console.WriteLine("MembershipFee:" + level.MembershipFee);
                Console.WriteLine("------");
            }
        }

        public static void LoadContacts()
        {
            Console.WriteLine();
            Console.WriteLine("Loading contacts");

            // Filters results to all members with with email address at gmail.com.
            // 'e-mail' is a system field, but its name can be modified by account
admin.
            //  If you have problem running program with this field name, check actual
name in admin view or just set filterExpression = "$filter=Member eq true"
            var filterExpression = "$filter=Member eq true and
substringof('e-Mail','@gmail.com')";

            // Retrieves only the specified fields. Leave it empty to retrieve all
fields.
            // 'First name',Phone,'e-mail' are system fields, but their names can be
modified by account admin.
            // If you have problem running program with these fields names, check
actual names in admin view or just set selectExpression = String.Empty
            var selectExpression = "$select='First name',Phone,'e-mail','Member
since','Member Id'";

            // build url
            var url = string.Format("{0}/v1/accounts/{1}/Contacts/?{2}&{3}",
CONST_BaseUrl, AccountId, filterExpression, selectExpression);
            var request = LoadObject(url);

            while (true)
            {
                System.Threading.Thread.Sleep(3000);

                request = LoadObject(request.ResultUrl.ToString());
                string state = request.State.ToString();
                Console.WriteLine("Request state is '{0}' at {1}", state,
DateTime.Now);

                switch (state)
                {
                    case "Complete":
                        {
                            foreach (var contact in request.Contacts)
                            {
                                Console.WriteLine("Contact #{0}:", contact.Id);
                                foreach (var field in contact.FieldValues)
                                {
                                    Console.WriteLine("  {0}: {1}", field.FieldName,
```

```
field.Value);
                                }
                                Console.WriteLine("------");
                            }
                            return;
                        }
                    case "Failed":
                        {
                            Console.WriteLine("Error:'{0}'", request.ErrorDetails);
                            return;
                        }
                }
            }
        }
```

```
    }
}
```

Using the sample Excel file

Using the sample Excel file

- Filtering the search results
- Choosing the fields to be included
- Viewing the sample code

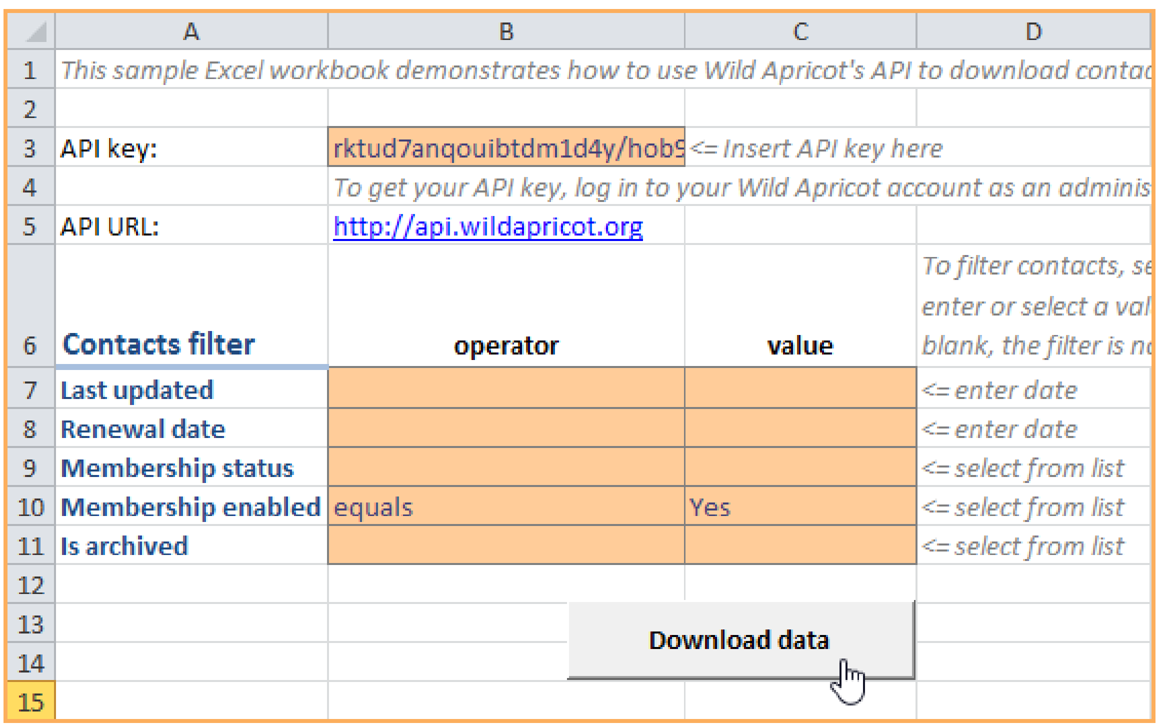
To help get you started with Wild Apricot's API, we have provided a sample Windows Excel file that uses API calls – programmed with Visual Basic – to download contact records and other information from a Wild Apricot account. The Excel file provides parameters that you can set to filter the results. You can use this file as is without any further programming or you can modify it according to your organization's requirements.

> The sample Excel file is provided as an example of how you can use the Wild Apricot API to download data from your Wild Apricot account. It works with Version 1 of the Wild Apricot API, and does not work with Open Office, only Microsoft Excel. Wild Apricot will not be supporting, customizing, or enhancing this file.

To download the sample Excel file, click here.

To retrieve contact records using the supplied Excel file, follow these steps:

1. Log into your Wild Apricot account as an administrator, find your API key, and copy it to the clipboard.
2. Open the Excel file in Excel. If you encounter errors opening the file, enable macros for this file or in your Excel options.
3. On the **Settings** tab, paste your API key into the **API key** field.
4. Click the **Download data** button.



The following information will be downloaded:

- Account information will now appear on the Settings tab.
- Contact and membership fields will be downloaded to the Fields tab.
- Membership levels will appear on the Levels tab.
- Contact records will be downloaded to the Contacts tab.

- Pivot charts will appear on the Sample Report tab displaying the number of contacts for each combination of membership level and status.

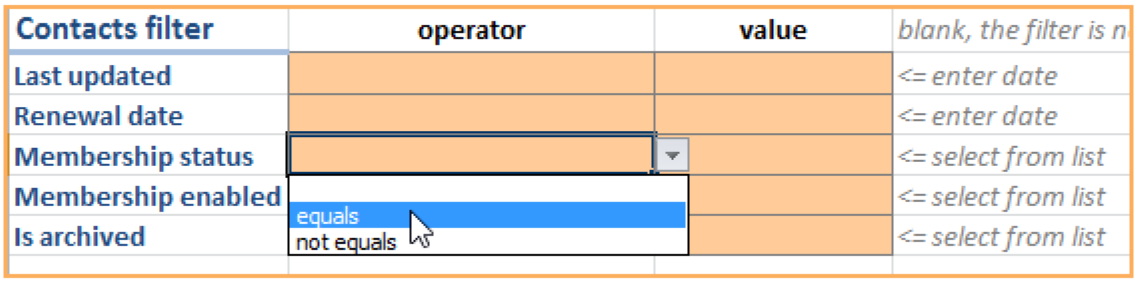
Filtering the search results

You can filter the search results so that only selected records are downloaded. You can filter the records by the following criteria:

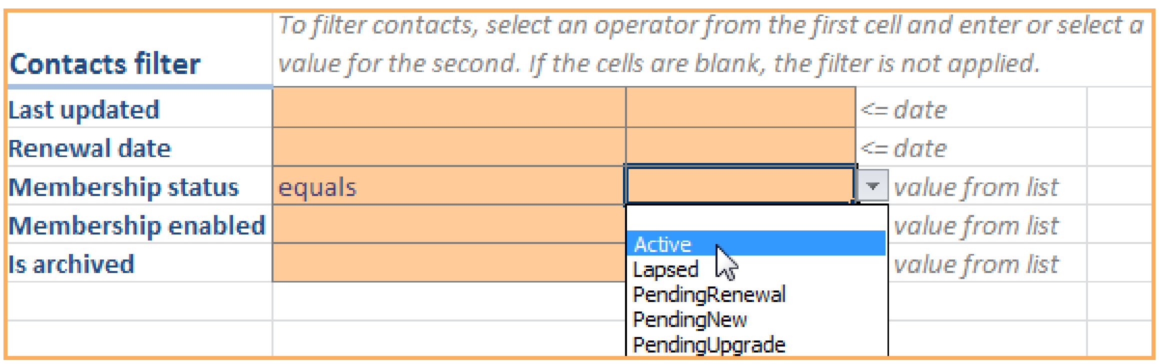
Last update – the date the contact record was last updated
Renewal date – the date the contact's membership was last renewed
Membership status – the status of the contact's membership
Membership enabled – whether the contact is a member
Is archived – whether the contact is archived

To filter the search results so that only selected records are downloaded, follow these steps:

1. Click the **operator** cell beside the filter criteria you want to use and select an operator from the list.



2. Select a value from the **value** cell. Do not type the value yourself. The value will be combined with the operator to form the search criteria. For example, to retrieve only records with an active membership status, you would select the **equals** operator and the **Active** val ue from the **Membership status** row.



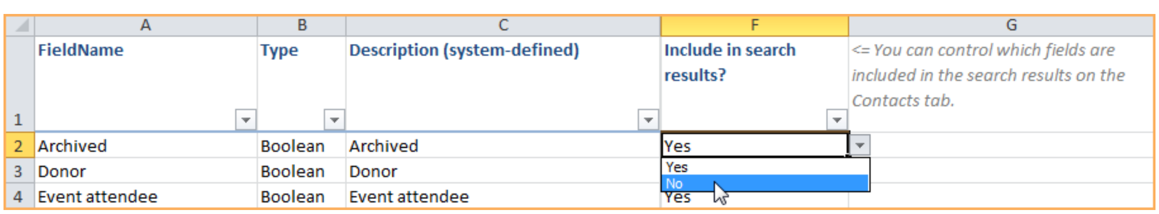
3. When you are finished setting filter criteria and ready to download your contact records, click the **Download data** button.

Your filtered results will now appear on the Contacts and the Sample Report tab.

Choosing the fields to be included

You can also control which fields are included in the search results. To do so, follow these steps:

1. After entering your API key, click the **Download data** button on the Settings tab to download your account data.
2. Click the **Fields** tab.
3. From the Fields tab, you can prevent fields from being included in the results by clicking the cell under the **Include in search results?** he ading and selecting **No** from the list.



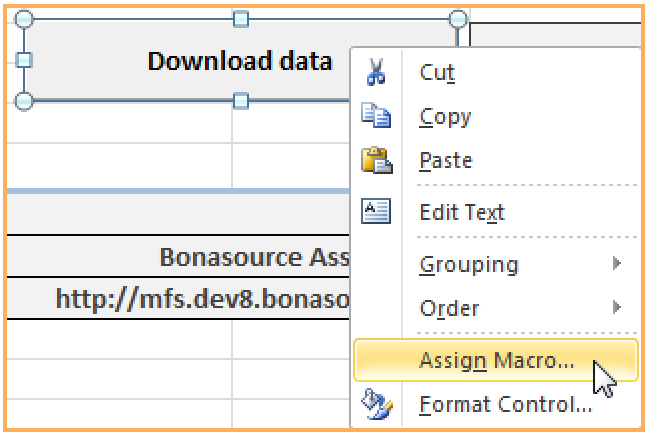
4. After you have chosen the fields to be included in the search results, return to the Settings tab.
5. Click the **Download data** button again.

Your search results will now be displayed on the Contacts tab using only the selected fields.

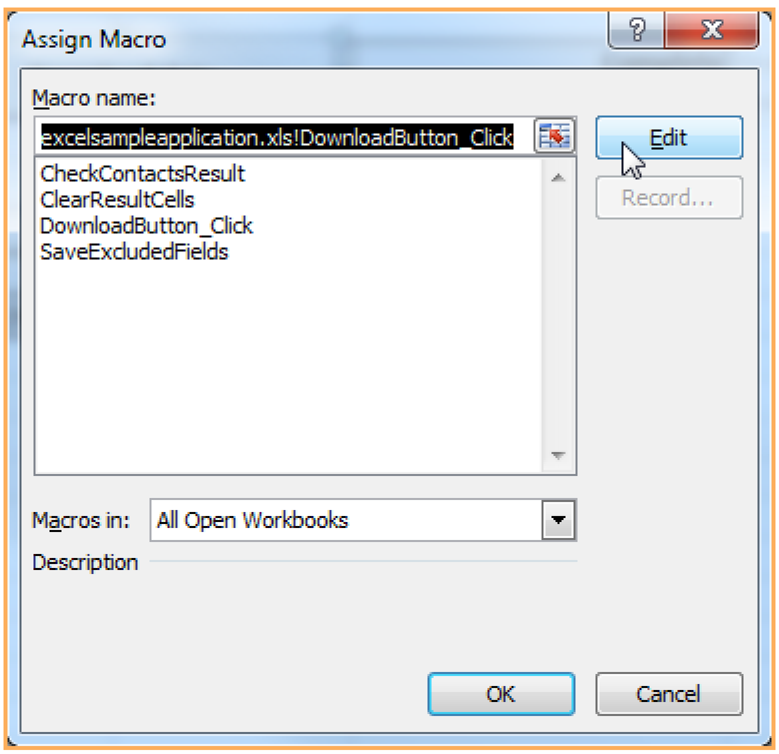
Viewing the sample code

To view the sample code triggered by the **Download data** button, follow these steps:

1. Right click over the **Download data** button.
2. Select the **Assign Macro** option from the dialog that appears.



3. From the Assign Macro screen, select the DownloadButton macro and click the **Edit** button.



Visual Basic for Applications will open, and display the DownloadButton macro.

API Version 2

Wild Apricot API Version 2

Wild Apricot's API is intended for use by developers with technical expertise. If you need assistance, we provide support via email o r through our Developers forum.

By using Wild Apricot's API, you accept the API License Agreement.

About Wild Apricot's API

An API – Application Programming Interface – is a set of functions that allow programs to interact with each other. With Wild Apricot's API, you can create programs to automatically retrieve and update data stored in your Wild Apricot database. Version 1 of Wild Apricot's API can be used only to retrieve information, while Version 2 now provides the ability to update contact information, event registration, and payments, along with a number of new API calls you can use to retrieve additional information.

An API consists of a number of API calls, each of which performs a specific function. For example, Wild Apricot's MembershipLevels API call allows you to retrieve detailed information about your membership levels. As part of an API call, you can include *parameters*, which are instructions or information used by the API to process your request.

For a complete list of Version 2 API calls, see API V2 calls.

Using API calls to retrieve data from Wild Apricot databases requires significant programming knowledge. If you want to take advantage of this functionality but lack the technical knowledge, you can engage the services of an approved Wild Apricot partner. To see how Wild Apricot's API works without having to write any code, you can use Wild Apricot's API browser, a JavaScript application embedded in a help topic.

Using Wild Apricot's API

Wild Apricot's API can be accessed from a 3rd-party server or application, or from a Wild Apricot site page. For information on differences between the two, see API access options.

Wild Apricot's API adheres to RESTful web service principles . Version 2 API calls take the form of HTML GET, PUT, POST, or DELETE requests formatted in either JSON (JavaScript Object Notation) or XML (Extensible Markup Language). Multiple API requests can be combined in a single batch request using the BATCH method.

Authentication

Each Wild Apricot API call must include authentication information that verifies your account and prevents others from accessing your data. The required authentication information – and how it is passed – differs depending on whether you are accessing the API from a 3rd party server or application, or from a Wild Apricot site page. For information on authenticating server-side access, see Authenticating API access from a 3rd-party server or application . For information on authenticating client-side access, see Authenticating API access from a Wild Apricot site page.

Versioning

The version number of the Wild Apricot API is included in the API call to allow existing applications to function after new versions are released.

In the following example, the *v2* value directs the call to version 2 of the Wild Apricot API.

```
GET https://api.wildapricot.org/v2/Accounts
```

A call to the base API – https://api.wildapricot.org – will return a list of available API versions.

API responses

Results from Wild Apricot API calls can be returned in either JSON (JavaScript Object Notation) or XML (Extensible Markup Language) formats. The default format is JSON.

To specify the response format, include the following field in the HTTP header:

```
Accept: application/{format}
```

where *{format}* can be either *json* or *xml*.

You can compress the response by including the following field in the HTTP header:

```
Accept-Encoding: gzip, deflate
```

For more information on compressing data in server responses, see HTTP compression.

API request limits

Currently, the limits on the number API request per minute are:

- 20 requests involving multiple contacts
- 60 requests involving single contacts
- 200 other requests.

Transitioning from API Version 1

You should keep the following in mind when you transition your application from Version 1 of the Wild Apricot's API to Version 2.

- Version 2 of Wild Apricot API's uses the OAuth authentication standard and issues OAuth authentication tokens. With Version 2, server-side authentication is a two-step process. In the first step, the client application requests an authentication token from the authentication server. In the second step, the authentication server returns an authentication token, which the client application uses in the API call.

  When accessing version 2 of Wild Apricot's API, an 3rd-party server or application must first be authorized to access your Wild Apricot account. During authorization, the application will be assigned a unique API key. Using the API key, your application can request an authentication token. For more information, see Authenticating API access from a 3rd-party server or application.

- The root node for an XML response to an asynchronous Contacts API call is now ApiResponse. With Version 1, it was AsyncResult.

On this page:

See also:

- API Version 1

- API V2 calls
- Remote procedure calls
- Batch API requests
- API V2 status codes
- API V2 browser
- Sample API V2 applications

API V2 calls

API V2 calls

You can use the following Wild Apricot API calls to retrieve and/or update information stored in your Wild Apricot database.

API call	What can I do with it?

Base API V2 call	• Retrieve a list of API versions • Retrieve a list of top-level API calls for a particular version
Accounts API V2 call	• Retrieve details about your Wild Apricot account(s)
AuditLogItems API V2 call	• Retrieve a filtered list of audit log entries • Retrieve a particular audit log entry
Bundles API V2 call	• Retrieve information for a specific bundle • Retrieve information for all bundles created using a particular membership level
ContactFields API V2 call	• Retrieve a detailed list of common, membership, and system fields
Contacts API V2 call	• Retrieve the number of contacts in your database • Retrieve a list of contact IDs • Retrieve a detailed list of contacts • Retrieve details about a particular contact • Create a new contact record • Update an existing contact record
EventRegistrations API V2 call	• Retrieve a list of event registrations for a particular event or contact • Retrieve details for one or more specific event registrations • Add a new event registration • Update an existing event registration • Delete an event registration
EventRegistrationTypes API V2 call	• Retrieve details for a particular registration type • Retrieve details for all registration types for a particular event • Add an event registration • Update an event registration • Delete an event registration
Events API V2 call	• Retrieve the number of events • Retrieve information for one or more specific events • Retrieve information for all events • Add a new event • Update details for an existing event • Delete an event
Invoices API V2 call	• Retrieve information for a particular invoice • Retrieve information for multiple invoices, filtered by date, contact, event, or unpaid invoices • Create a new invoice • Edit an existing invoice • Void an invoice • Delete an invoice
MemberGroups API V2 call	• Retrieve information for all member groups • Retrieve information for a particular member group
MembershipLevels API V2 call	• Retrieve details about all membership levels • Retrieve details about a particular membership level
PaymentAllocations API V2 call	• Retrieve information about payment allocations for a particular invoice or payment

Payments API V2 call	• Retrieve payment information for a particular payment • Retrieve information for multiple payments, filtered by date, contact, or event • Create a new payment • Edit an existing payment • Delete an existing payment
Pictures API V2 call	• upload a picture to your Wild Apricot account • download a picture assigned to a picture field
Refunds V2 API call	• Retrieve information for a particular refund • Retrieve information for multiple refunds, filtered by date, contact, or event • Create a new refund • Edit an existing refund • Delete an existing refund
SavedSearches API V2 call	• Retrieve information about all saved contact or member searches • Retrieve information about a particular saved contact or member search
Tenders API V2 call	• Retrieve information about all payment tenders • Retrieve information about a particular payment tender

To see how Wild Apricot's API works without having to write any code, you can use Wild Apricot's API browser, a JavaScript application embedded in a help topic.

See also:

- API Version 2
- Batch API requests

Base API V2 call

Base API V2 call

Wild Apricot's API is intended for use by developers with technical expertise. If you need assistance, we provide support via email o r through our Developers forum.

You can use the base API call to retrieve a list of API versions, or the next level of API calls for a particular version.

Retrieving a list of API versions

Calling the base API without specifying any further parameters will return a list of available API versions.

Syntax

```
GET https://api.wildapricot.org
```

Each API call must include an authentication information that verifies your account and prevents others from accessing your data. For more information, see Authenticating API access from a 3rd-party server or application or Authenticating API access from a Wild Apricot site page.

Response fields

For each API version, the base API call retrieves the following information.

Field	Description

Version	The version number of the API.
Name	The full name of the API version.
URL	The URL of the API version. This address is the same as the call used to display a list of API calls for this version.
Deprecated	Indicates whether this version has been superseded by a newer version and is therefore obsolete. Possible values are *true* and *false*.

Sample JSON response

```
[
  {
    "Version": 2,
    "Name": "Wild Apricot API version 2",
    "Url": "http://api.wildapricot.org/v2",
    "Deprecated": false
  }
]
```

Sample XML response

```
<ArrayOfApiVersion xmlns:i="http://www.w3.org/2001/XMLSchema-instance"
xmlns="http://api.wildapricot.org">
  <ApiVersion>
    <Deprecated>false</Deprecated>
    <Name>Wild Apricot API Version 2</Name>
    <Url>http://api.wildapricot.org/v2</Url>
    <Version>2</Version>
  </ApiVersion>
</ArrayOfApiVersion>
```

Retrieving API calls for a particular version

If you add the version number to the base API call, a list of top-level API calls will be returned.

A number of other API calls may be subordinate to the top-level call(s). For example, the MembershipLevels, ContactFields, and Contacts API calls are grouped under the Accounts API V1 call.

Syntax

```
GET https://api.wildapricot.org/{version}
```

where *{version}* is the version number of the API.

Example

```
GET https://api.wildapricot.org/v2
```

Each API call must include an authentication token that authenticates your account and prevents others from accessing your data.

For more information, see API V2 authentication.

Response fields

For each API call, the base API call retrieves the following information.

<table>
<tr><th>Field</th><th>Description</th></tr>
<tr><td>Name</td><td>The full name of the API call.</td></tr>
<tr><td>URL</td><td>The URL of the API call. To view API calls nested under the returned call, run the URL.</td></tr>
<tr><td>AllowedOperations</td><td>The operations that can be performed using the API call. Possible values are:
<table>
<tr><th>Operation</th><th>Description</th></tr>
<tr><td>GET</td><td>Retrieve data</td></tr>
<tr><td>POST</td><td>Create record</td></tr>
<tr><td>PUT</td><td>Update data</td></tr>
<tr><td>DELETE</td><td></td></tr>
</table>
</td></tr>
</table>

Sample JSON response


```
{
    "Name": "Accounts",
    "Url": "https://api.wildapricot.org/v2/Accounts"
}
```


Sample XML response


```
<ArrayOfResource xmlns:i="http://www.w3.org/2001/XMLSchema-instance"
xmlns="http://api.wildapricot.org">
  <Resource>
    <AllowedOperations
xmlns:d3p1="http://schemas.microsoft.com/2003/10/Serialization/Arrays">
      <d3p1:string>GET</d3p1:string>
    </AllowedOperations>
    <Description i:nil="true" />
    <Name>Accounts</Name>
    <Url>http://api.wildapricot.org/v2/Accounts</Url>
  </Resource>
</ArrayOfResource>
```


On this page:

See also:

- API V2 authentication
- API V2 calls

Accounts API V2 call

Wild Apricot's API is intended for use by developers with technical expertise. If you need assistance, we provide support via email or through our Developers forum.

You can use the Accounts API call to retrieve details about your Wild Apricot account(s). You can retrieve information for all your accounts or just a specific account.

Retrieving information for all accounts

Syntax

```
GET {baseAPIaddress}/v2/Accounts
```

where *{baseAPIaddress}* is the base API address. For more information, see API access options.

Example

```
GET https://api.wildapricot.org/v2/Accounts
```

Retrieving information for a specific account

Syntax

```
GET {baseAPIaddress}/v2/Accounts/{accountID}
```

where *{baseAPIaddress}* is the base API address (see API access options) and *{accountID}* is the unique account identifier returned by the Accounts API call.

Example

```
GET https://api.wildapricot.org/v2/Accounts/58293
```

Each API call must include an authentication information that verifies your account and prevents others from accessing your data. For more information, see Authenticating API access from a 3rd-party server or application or Authenticating API access from a Wild Apricot site page.

Response fields

For each of your Wild Apricot accounts, the Accounts API call retrieves the following information.

Field	Description
Id	The account identifier. The account ID also appears on the Account and billing screen in Wild Apricot.
Name	The account name. This corresponds to the organization name as it appears on the Organization details screen.

<table>
<tr><td>Url</td><td>The address of the API call.</td></tr>
<tr><td>PrimaryDomainName</td><td>The primary domain name of the account.</td></tr>
<tr><td>Resources</td><td>Available API calls for this account. For each available call, the name, the URL, and the allowed operations of the call are returned.</td></tr>
<tr><td>ContactLimitInfo</td><td>Provides details about limits on the number of contacts. The following fields are displayed.
<table>
<tr><th>Field</th><th>Description</th></tr>
<tr><td>CurrentContactsCount</td><td>The current number of contacts in the database.</td></tr>
<tr><td>BillingPlanContactsLimit</td><td>The maximum number of contacts allowed within the account's billing plan.</td></tr>
</table>
</td></tr>
</table>

Sample JSON response

Click here to expand/collapse


```
[
  {
    "PrimaryDomainName": "stevelivetestsite.wildapricot.org",
    "Resources": [
      {
        "Name": "Contacts",
        "Url": "http://api.wildapricot.org/v2/accounts/42353/Contacts/",
        "AllowedOperations": [
          "GET",
          "POST",
          "PUT"
        ]
      },
      {
        "Name": "Membership levels",
        "Url": "http://api.wildapricot.org/v2/accounts/42353/MembershipLevels/",
        "AllowedOperations": [
          "GET"
        ]
      },
      {
        "Name": "Contact fields",
        "Url": "http://api.wildapricot.org/v2/accounts/42353/ContactFields/",
        "AllowedOperations": [
          "GET"
        ]
      },
      {
        "Name": "Membership groups",
        "Url": "http://api.wildapricot.org/v2/accounts/42353/MembershipGroups/",
        "AllowedOperations": [
          "GET"
        ]
      },
      {
        "Name": "Saved searches",
        "Url": "http://api.wildapricot.org/v2/accounts/42353/SavedSearches/",
```

```
        "AllowedOperations": [
          "GET"
        ]
      },
      {
        "Name": "Bundles",
        "Url": "http://api.wildapricot.org/v2/accounts/42353/Bundles/",
        "Description": "Requires levelId query string parameter.",
        "AllowedOperations": [
          "GET"
        ]
      },
      {
        "Name": "Invoices",
        "Url": "http://api.wildapricot.org/v2/accounts/42353/Invoices/",
        "Description": "Requires contactId or eventId query string parameter.",
        "AllowedOperations": [
          "GET"
        ]
      },
      {
        "Name": "Payments",
        "Url": "http://api.wildapricot.org/v2/accounts/42353/Payments/",
        "Description": "Requires contactId query string parameter.",
        "AllowedOperations": [
          "GET",
          "POST",
          "DELETE"
        ]
      },
      {
        "Name": "Payment allocations",
        "Url":
"http://api.wildapricot.org/v2/accounts/42353/PaymentAllocations/",
        "Description": "Requires paymentId or invoiceId query string parameter.",
        "AllowedOperations": [
          "GET"
        ]
      },
      {
        "Name": "Tenders",
        "Url": "http://api.wildapricot.org/v2/accounts/42353/Tenders/",
        "AllowedOperations": [
          "GET"
        ]
      },
      {
        "Name": "Events",
        "Url": "http://api.wildapricot.org/v2/accounts/42353/Events/",
        "AllowedOperations": [
          "GET"
        ]
      },
      {
        "Name": "Event registrations",
        "Url":
"http://api.wildapricot.org/v2/accounts/42353/EventRegistrations/",
        "Description": "Requires contactId or eventId query string parameter.",
        "AllowedOperations": [
```

```
        "GET",
        "POST",
        "PUT",
        "DELETE"
      ]
    }
  ],
  "Id": 42353,
  "Url": "http://api.wildapricot.org/v2/Accounts/42353",
```

```
    "Name": "International Association of Typographers"
  }
]
```

Sample XML response

Click here to expand/collapse


```
<ArrayOfAccount xmlns:i="http://www.w3.org/2001/XMLSchema-instance"
xmlns="http://api.wildapricot.org">
  <Account>
    <Id>42353</Id>
    <Url>http://api.wildapricot.org/v2/Accounts/42353</Url>
    <Name>International Association of Typographers</Name>
    <ContactLimitInfo>
      <BillingPlanContactsLimit>500</BillingPlanContactsLimit>
      <CurrentContactsCount>28</CurrentContactsCount>
    </ContactLimitInfo>
    <PrimaryDomainName>stevelivetestsite.wildapricot.org</PrimaryDomainName>
    <Resources>
      <Resource>
        <AllowedOperations
xmlns:d5p1="http://schemas.microsoft.com/2003/10/Serialization/Arrays">
          <d5p1:string>GET</d5p1:string>
          <d5p1:string>POST</d5p1:string>
          <d5p1:string>PUT</d5p1:string>
        </AllowedOperations>
        <Description i:nil="true" />
        <Name>Contacts</Name>
        <Url>http://api.wildapricot.org/v2/accounts/42353/Contacts/</Url>
      </Resource>
      <Resource>
        <AllowedOperations
xmlns:d5p1="http://schemas.microsoft.com/2003/10/Serialization/Arrays">
          <d5p1:string>GET</d5p1:string>
        </AllowedOperations>
        <Description i:nil="true" />
        <Name>Membership levels</Name>
        <Url>http://api.wildapricot.org/v2/accounts/42353/MembershipLevels/</Url>
      </Resource>
      <Resource>
        <AllowedOperations
xmlns:d5p1="http://schemas.microsoft.com/2003/10/Serialization/Arrays">
          <d5p1:string>GET</d5p1:string>
        </AllowedOperations>
        <Description i:nil="true" />
        <Name>Contact fields</Name>
        <Url>http://api.wildapricot.org/v2/accounts/42353/ContactFields/</Url>
      </Resource>
      <Resource>
        <AllowedOperations
xmlns:d5p1="http://schemas.microsoft.com/2003/10/Serialization/Arrays">
          <d5p1:string>GET</d5p1:string>
        </AllowedOperations>
        <Description i:nil="true" />
        <Name>Member groups</Name>
        <Url>http://api.wildapricot.org/v2/accounts/42353/MemberGroups/</Url>
```

```
      </Resource>
      <Resource>
        <AllowedOperations
xmlns:d5p1="http://schemas.microsoft.com/2003/10/Serialization/Arrays">
          <d5p1:string>GET</d5p1:string>
        </AllowedOperations>
        <Description i:nil="true" />
        <Name>Saved searches</Name>
        <Url>http://api.wildapricot.org/v2/accounts/42353/SavedSearches/</Url>
      </Resource>
      <Resource>
        <AllowedOperations
xmlns:d5p1="http://schemas.microsoft.com/2003/10/Serialization/Arrays">
          <d5p1:string>GET</d5p1:string>
        </AllowedOperations>
        <Description>Requires levelId query string parameter.</Description>
        <Name>Bundles</Name>
        <Url>http://api.wildapricot.org/v2/accounts/42353/Bundles/</Url>
      </Resource>
      <Resource>
        <AllowedOperations
xmlns:d5p1="http://schemas.microsoft.com/2003/10/Serialization/Arrays">
          <d5p1:string>GET</d5p1:string>
        </AllowedOperations>
        <Description>Requires contactId or eventId query string
parameter.</Description>
        <Name>Invoices</Name>
        <Url>http://api.wildapricot.org/v2/accounts/42353/Invoices/</Url>
      </Resource>
      <Resource>
        <AllowedOperations
xmlns:d5p1="http://schemas.microsoft.com/2003/10/Serialization/Arrays">
          <d5p1:string>GET</d5p1:string>
          <d5p1:string>POST</d5p1:string>
          <d5p1:string>DELETE</d5p1:string>
        </AllowedOperations>
        <Description>Requires contactId query string parameter.</Description>
        <Name>Payments</Name>
        <Url>http://api.wildapricot.org/v2/accounts/42353/Payments/</Url>
      </Resource>
      <Resource>
        <AllowedOperations
xmlns:d5p1="http://schemas.microsoft.com/2003/10/Serialization/Arrays">
          <d5p1:string>GET</d5p1:string>
        </AllowedOperations>
        <Description>Requires paymentId or invoiceId query string
parameter.</Description>
        <Name>Payment allocations</Name>

<Url>http://api.wildapricot.org/v2/accounts/42353/PaymentAllocations/</Url>
      </Resource>
      <Resource>
        <AllowedOperations
xmlns:d5p1="http://schemas.microsoft.com/2003/10/Serialization/Arrays">
          <d5p1:string>GET</d5p1:string>
        </AllowedOperations>
        <Description i:nil="true" />
        <Name>Tenders</Name>
        <Url>http://api.wildapricot.org/v2/accounts/42353/Tenders/</Url>
```

```
      &lt;/Resource&gt;
      &lt;Resource&gt;
        <AllowedOperations
xmlns:d5p1="http://schemas.microsoft.com/2003/10/Serialization/Arrays">
          &lt;d5p1:string&gt;GET&lt;/d5p1:string&gt;
        &lt;/AllowedOperations&gt;
        &lt;Description i:nil="true" /&gt;
        &lt;Name&gt;Events&lt;/Name&gt;
        &lt;Url&gt;http://api.wildapricot.org/v2/accounts/42353/Events/&lt;/Url&gt;
      &lt;/Resource&gt;
      &lt;Resource&gt;
        <AllowedOperations
xmlns:d5p1="http://schemas.microsoft.com/2003/10/Serialization/Arrays">
          &lt;d5p1:string&gt;GET&lt;/d5p1:string&gt;
          &lt;d5p1:string&gt;POST&lt;/d5p1:string&gt;
          &lt;d5p1:string&gt;PUT&lt;/d5p1:string&gt;
          &lt;d5p1:string&gt;DELETE&lt;/d5p1:string&gt;
        &lt;/AllowedOperations&gt;
        &lt;Description&gt;Requires contactId or eventId query string
parameter.&lt;/Description&gt;
        &lt;Name&gt;Event registrations&lt;/Name&gt;

&lt;Url&gt;http://api.wildapricot.org/v2/accounts/42353/EventRegistrations/&lt;/Url&gt;
      &lt;/Resource&gt;
    &lt;/Resources&gt;
  &lt;/Account&gt;
  &lt;Account&gt;
    &lt;Id&gt;42360&lt;/Id&gt;
    &lt;Url&gt;http://api.wildapricot.org/v2/Accounts/42360&lt;/Url&gt;
    &lt;Name&gt;American Association of Typographers&lt;/Name&gt;
    &lt;ContactLimitInfo&gt;
      &lt;BillingPlanContactsLimit&gt;500&lt;/BillingPlanContactsLimit&gt;
      &lt;CurrentContactsCount&gt;28&lt;/CurrentContactsCount&gt;
    &lt;/ContactLimitInfo&gt;
    &lt;PrimaryDomainName&gt;WaMobileApp.dev8.bonasource.com&lt;/PrimaryDomainName&gt;
    &lt;Resources&gt;
      &lt;Resource&gt;
        <AllowedOperations
xmlns:d5p1="http://schemas.microsoft.com/2003/10/Serialization/Arrays">
          &lt;d5p1:string&gt;GET&lt;/d5p1:string&gt;
          &lt;d5p1:string&gt;POST&lt;/d5p1:string&gt;
          &lt;d5p1:string&gt;PUT&lt;/d5p1:string&gt;
        &lt;/AllowedOperations&gt;
        &lt;Description i:nil="true" /&gt;
        &lt;Name&gt;Contacts&lt;/Name&gt;
        &lt;Url&gt;http://api.wildapricot.org/v2/accounts/42360/Contacts/&lt;/Url&gt;
      &lt;/Resource&gt;
      &lt;Resource&gt;
        <AllowedOperations
xmlns:d5p1="http://schemas.microsoft.com/2003/10/Serialization/Arrays">
          &lt;d5p1:string&gt;GET&lt;/d5p1:string&gt;
        &lt;/AllowedOperations&gt;
        &lt;Description i:nil="true" /&gt;
        &lt;Name&gt;Membership levels&lt;/Name&gt;
        &lt;Url&gt;http://api.wildapricot.org/v2/accounts/42360/MembershipLevels/&lt;/Url&gt;
      &lt;/Resource&gt;
      &lt;Resource&gt;
        <AllowedOperations
xmlns:d5p1="http://schemas.microsoft.com/2003/10/Serialization/Arrays">
```

```
          <d5p1:string>GET</d5p1:string>
        </AllowedOperations>
        <Description i:nil="true" />
        <Name>Contact fields</Name>
        <Url>http://api.wildapricot.org/v2/accounts/42360/ContactFields/</Url>
      </Resource>
      <Resource>
        <AllowedOperations
xmlns:d5p1="http://schemas.microsoft.com/2003/10/Serialization/Arrays">
          <d5p1:string>GET</d5p1:string>
        </AllowedOperations>
        <Description i:nil="true" />
        <Name>Member groups</Name>
        <Url>http://api.wildapricot.org/v2/accounts/42360/MemberGroups/</Url>
      </Resource>
      <Resource>
        <AllowedOperations
xmlns:d5p1="http://schemas.microsoft.com/2003/10/Serialization/Arrays">
          <d5p1:string>GET</d5p1:string>
        </AllowedOperations>
        <Description i:nil="true" />
        <Name>Saved searches</Name>
        <Url>http://api.wildapricot.org/v2/accounts/42360/SavedSearches/</Url>
      </Resource>
      <Resource>
        <AllowedOperations
xmlns:d5p1="http://schemas.microsoft.com/2003/10/Serialization/Arrays">
          <d5p1:string>GET</d5p1:string>
        </AllowedOperations>
        <Description>Requires levelId query string parameter.</Description>
        <Name>Bundles</Name>
        <Url>http://api.wildapricot.org/v2/accounts/42360/Bundles/</Url>
      </Resource>
      <Resource>
        <AllowedOperations
xmlns:d5p1="http://schemas.microsoft.com/2003/10/Serialization/Arrays">
          <d5p1:string>GET</d5p1:string>
        </AllowedOperations>
        <Description>Requires contactId or eventId query string
parameter.</Description>
        <Name>Invoices</Name>
        <Url>http://api.wildapricot.org/v2/accounts/42360/Invoices/</Url>
      </Resource>
      <Resource>
        <AllowedOperations
xmlns:d5p1="http://schemas.microsoft.com/2003/10/Serialization/Arrays">
          <d5p1:string>GET</d5p1:string>
          <d5p1:string>POST</d5p1:string>
          <d5p1:string>DELETE</d5p1:string>
        </AllowedOperations>
        <Description>Requires contactId query string parameter.</Description>
        <Name>Payments</Name>
        <Url>http://api.wildapricot.org/v2/accounts/42360/Payments/</Url>
      </Resource>
      <Resource>
        <AllowedOperations
xmlns:d5p1="http://schemas.microsoft.com/2003/10/Serialization/Arrays">
          <d5p1:string>GET</d5p1:string>
        </AllowedOperations>
```

```
        <Description>Requires paymentId or invoiceId query string
parameter.</Description>
        <Name>Payment allocations</Name>

<Url>http://api.wildapricot.org/v2/accounts/42360/PaymentAllocations/</Url>
      </Resource>
      <Resource>
        <AllowedOperations
xmlns:d5p1="http://schemas.microsoft.com/2003/10/Serialization/Arrays">
          <d5p1:string>GET</d5p1:string>
        </AllowedOperations>
        <Description i:nil="true" />
        <Name>Tenders</Name>
        <Url>http://api.wildapricot.org/v2/accounts/42360/Tenders/</Url>
      </Resource>
      <Resource>
        <AllowedOperations
xmlns:d5p1="http://schemas.microsoft.com/2003/10/Serialization/Arrays">
          <d5p1:string>GET</d5p1:string>
        </AllowedOperations>
        <Description i:nil="true" />
        <Name>Events</Name>
        <Url>http://api.wildapricot.org/v2/accounts/42360/Events/</Url>
      </Resource>
      <Resource>
        <AllowedOperations
xmlns:d5p1="http://schemas.microsoft.com/2003/10/Serialization/Arrays">
          <d5p1:string>GET</d5p1:string>
          <d5p1:string>POST</d5p1:string>
          <d5p1:string>PUT</d5p1:string>
          <d5p1:string>DELETE</d5p1:string>
        </AllowedOperations>
        <Description>Requires contactId or eventId query string
parameter.</Description>
        <Name>Event registrations</Name>

<Url>http://api.wildapricot.org/v2/accounts/42360/EventRegistrations/</Url>
      </Resource>
    </Resources>
```

```
  </Account>
</ArrayOfAccount>
```

On this page:

- Retrieving information for all accounts
- Retrieving information for a specific account
- Response fields
- Sample JSON response
- Sample XML response

See also:

- API V2 authentication
- API V2 calls

AuditLogItems API V2 call

AuditLogitems API V2 call

Wild Apricot's API is intended for use by developers with technical expertise. If you need assistance, we provide support via email or through our Developers forum.

You can use the AuditLogItems API call to retrieve a filtered list of audit log entries, and to retrieve a particular audit log entry.

Retrieving a particular audit log entry

Syntax

```
GET {baseAPIaddress}/v2.1/Accounts/{accountID}/AuditLogItems/{entryID}
```

Example:

```
GET https://api.wildapricot.org/v2.1/Accounts/58293/AuditLogItems/2525543
```

Retrieving multiple audit log entries

Syntax

```
GET {baseAPIaddress}/v2.1/Accounts/{accountID}/AuditLogItems/?{filterCriteria}
```

Example:

```
GET
https://api.wildapricot.org/v2.1/accounts/13703/AuditLogItems/?FilterObjectType=Even
t&FilterObjectId=51377
```

Parameters

The following parameters are used within the AuditLogItems API call:

Variable	Description
baseAPIaddress	The base address of the API. For more information, see API access options .
accountID	The account identifier that appears on the Account and billing screen and is returned by the Accounts API call.
entryID	The unique identifier for an audit log entry. Audit log entry IDs are returned by the AuditLogItems call.
filterCriteria	The criteria used to filter the search results. This is a required parameter. For details, see Filtering the results (below).

Each API call must include an authentication information that verifies your account and prevents others from accessing your data. For more information, see Authenticating API access from a 3rd-party server or application or Authenticating API access from a Wild Apricot site page.

Filtering the results

When retrieving multiple audit log entries, you must include filter criteria. You can filter the results by specifying a filter object, by specifying a start and/or end date, and by specifying a set of audit log entry ids. You can combine multiple filter criteria to further narrow the results.

Specifying a filter object

Specifying a filter object allows you to filter the audit log entries by a particular customer, event, event registration, invoice, payment, refund, or donation.
Syntax

```
GET
{baseAPIaddress}/v2.1/Accounts/{accountID}/AuditLogItems/?FilterObjectType={objectTy
pe}&FilterObjectId={objectID}
```

where *objectTyp*e can be Customer, Event , EventRegistration, Invoice, Payment, Refund, or Donation, and *objectID* is the unique identifier of the customer, event, event registration, invoice, payment, refund, or donation.
Example:

```
GET
https://api.wildapricot.org/v2.1/accounts/13703/AuditLogItems/?FilterObjectType=Even
t&FilterObjectId=51377
```

Specifying a start or end document date

You can filter the audit log entries by specifying a start date and/or an end date (using the DocumentDate field).
Syntax

```
GET
{baseAPIaddress}/v2.1/Accounts/{accountID}/AuditLogItems/?StartDate={date}&EndDate={
date}
```

where *date* is the start or end date of the range (using the *yyyy-mm-dd* date format).
Example:

```
GET
https://api.wildapricot.org/v2.1/accounts/13703/AuditLogItems/?StartDate=2016-11-01&
EndDate=2016-11-30
```

Specifying a set of audit log entries

You can filter the audit log entries by specifying a set of audit log entries.
Syntax

```
GET
{baseAPIaddress}/v2.1/Accounts/{accountID}/AuditLogItems/?ids={id1},{id2},{id3}...
```

where *id* is the unique identifier of an audit log entry.
Example:

```
GET
https://api.wildapricot.org/v2.1/accounts/13703/AuditLogItems/?ids=2525543,2525544
```

Paging

Using the **$skip** and **$top** parameters, you can retrieve audit log entries in sets or pages. You use the $top parameter to specify the maximum number of entries to be returned, and the $skip parameter to specify the number of entries to skip. The $skip parameter is incremented each call to return the next set or page of entries.

Example

You want to retrieve 50 entries using an application that can only process 20 records at a time. Using the following calls, the application retrieves the first set of 20 entries, then a second set of 20, and finally, the remaining 10 entries.

```
https://api.wildapricot.org/v2.1/accounts/13703/AuditLogItems/?FilterObjectType=Even
t&FilterObjectId=51377&$skip=0&$top=20
https://api.wildapricot.org/v2.1/accounts/13703/AuditLogItems/?FilterObjectType=Even
t&FilterObjectId=51377&$skip=20&$top=20
https://api.wildapricot.org/v2.1/accounts/13703/AuditLogItems/?FilterObjectType=Even
t&FilterObjectId=51377&$skip=40&$top=20
```

In this example, the $top specifies the maximum number of entries to retrieve (20), and the $skip parameter is incremented from 0 to 20 to 40 to skip the entries retrieved by the previous call(s).

Response fields

For each audit log entry, the AuditLogItems API call retrieves the following information.

Field	Description
Timestamp	The date and time the entry was created.
Contact	The ID and URL of the contact the entry applies to.

FirstName	The first name of the contact.
LastName	The last name of the contact.
Email	The email address of the contact.
Organization	The organization of the contact.
Message	The message displayed for this audit log entry.
Severity	The importance of the message. Possible values are: • Undefined • Verbose • Information • AttentionRequired • Warning • Error • Critical
OrderType	The origin of the audit log entry. Possible values are: • Undefined • MembershipApplication • MembershipRenewal • MembershipLevelChange • EventRegistration • Donation • ChangeBillingPlan • ChangeBillingInfo
Properties	Key/value array with technical information from payment systems. Only returned when retrieving a single audit log entry.
ID	The unique identifier of the audit log entry.
URL	The URL of the audit log entry.

Sample JSON response

```
{
  "Items": [
    {
      "Timestamp": "2016-11-21T15:41:41.19+00:00",
      "Contact": {
        "Id": 29977001,
        "Url": "https://api.wildapricot.org/v2/accounts/203011/Contacts/29977001"
      },
      "FirstName": "Dana",
      "LastName": "Dana",
      "Email": "dbarrett@test.com",
      "Organization": "",
      "Message": "Invoice #00003 generated for Member application by Barrett, Dana.
Amount $10.00.",
      "Severity": "Information",
      "OrderType": "MembershipApplication",
      "Properties": null,
      "Id": 8522488,
      "Url": "https://api.wildapricot.org/v2/accounts/203011/AuditLogItems/8522488"
    },
    {
      "Timestamp": "2016-11-21T15:38:54.513+00:00",
      "Contact": {
        "Id": 29976949,
        "Url": "https://api.wildapricot.org/v2/accounts/203011/Contacts/29976949"
      },
      "FirstName": "Steve",
      "LastName": "Steve",
      "Email": "steve@wildapricot.com",
      "Organization": "Keep It Wild",
      "Message": "Invoice #00002 generated for Event registration by Andrews, Steve.
Amount $80.00.",
      "Severity": "Information",
      "OrderType": "EventRegistration",
      "Properties": null,
      "Id": 8522485,
      "Url": "https://api.wildapricot.org/v2/accounts/203011/AuditLogItems/8522485"
    }
  ]
}
```


Sample XML response

```
<ApiResponse xmlns:i="http://www.w3.org/2001/XMLSchema-instance"
i:type="AuditItemsListResult" xmlns="http://api.wildapricot.org">
  <Items>
    <AuditItem>
      <Id>8522488</Id>

<Url>https://api.wildapricot.org/v2/accounts/203011/AuditLogItems/8522488</Url>
      <Contact>
        <Id>29977001</Id>
        <Url>https://api.wildapricot.org/v2/accounts/203011/Contacts/29977001</Url>
      </Contact>
      <Email>dbarrett@test.com</Email>
      <FirstName>Dana</FirstName>
      <LastName>Dana</LastName>
      <Message>Invoice #00003 generated for Member application by Barrett, Dana.
Amount $10.00.</Message>
      <OrderType>MembershipApplication</OrderType>
      <Organization>
      </Organization>
      <Properties
xmlns:d4p1="http://schemas.microsoft.com/2003/10/Serialization/Arrays" i:nil="true"
/>
      <Severity>Information</Severity>
      <Timestamp xmlns:d4p1="http://schemas.datacontract.org/2004/07/System">
        <d4p1:DateTime>2016-11-21T15:41:41.19Z</d4p1:DateTime>
        <d4p1:OffsetMinutes>0</d4p1:OffsetMinutes>
      </Timestamp>
    </AuditItem>
    <AuditItem>
      <Id>8522485</Id>

<Url>https://api.wildapricot.org/v2/accounts/203011/AuditLogItems/8522485</Url>
      <Contact>
        <Id>29976949</Id>
        <Url>https://api.wildapricot.org/v2/accounts/203011/Contacts/29976949</Url>
      </Contact>
      <Email>steve@wildapricot.com</Email>
      <FirstName>Steve</FirstName>
      <LastName>Steve</LastName>
      <Message>Invoice #00002 generated for Event registration by Andrews, Steve.
Amount $80.00.</Message>
      <OrderType>EventRegistration</OrderType>
      <Organization>Keep It Wild</Organization>
      <Properties
xmlns:d4p1="http://schemas.microsoft.com/2003/10/Serialization/Arrays" i:nil="true"
/>
      <Severity>Information</Severity>
      <Timestamp xmlns:d4p1="http://schemas.datacontract.org/2004/07/System">
        <d4p1:DateTime>2016-11-21T15:38:54.513Z</d4p1:DateTime>
        <d4p1:OffsetMinutes>0</d4p1:OffsetMinutes>
      </Timestamp>
    </AuditItem>
  </Items>
</ApiResponse>
```


On this page:

See also:

- API V2 authentication
- API V2 calls

Bundles API V2 call

Wild Apricot's API is intended for use by developers with technical expertise. If you need assistance, we provide support via email or through our Developers forum.

You can use the Bundles API call to retrieve information about a particular membership bundle. You can retrieve information for a specific bundle, or retrieve information for all bundles created using a particular membership level.

Retrieving information about a particular bundle

You can retrieve bundle information about a specific bundle by specifying the bundle ID. The bundle ID is returned by the Contacts API call, and by the Bundles API call when using it to retrieve bundle information for a particular membership level (see below).

Syntax

```
GET {baseAPIaddress}/v2/Accounts/{accountID}/Bundles/{bundleID}
```

Example

```
GET https://api.wildapricot.org/v2/Accounts/58293/Bundles/9086
```

Retrieving bundle information for a membership level

You can retrieve bundle information for all bundles created using a particular membership level by specifying the membership level ID.

Syntax

```
GET {baseAPIaddress}/v2/Accounts/{accountID}/Bundles/?levelId={levelID}
```

Example

```
GET https://api.wildapricot.org/v2/Accounts/58293/Bundles/?levelId=29881
```

Parameters

The following parameters are used within the Bundles API call:

Variable	Description
{baseAPIaddress}	The base address of the API. For more information, see API access options.
{accountID}	The account identifier that appears on the Account and billing screen and is returned by the Accounts API call.
{bundleID}	The unique identifier for a membership bundle. The bundle ID is returned by the Contacts API call, and by the Bundles API call when using it to retrieve bundle information for a particular membership level.
{levelID}	The unique identifier for a membership level. The membership level ID is returned by the MembershipLevels API call.

Each API call must include an authentication information that verifies your account and prevents others from accessing your data. For more information, see Authenticating API access from a 3rd-party server or application or Authenticating API access from a Wild Apricot site page.

Response fields

For each bundle, the Bundles API call retrieves the following information.

Field	Description
Email	The email address of the bundle administrator.
ParticipantsCount	The number of members in the bundle.
Administrator	The contact ID and contact URL of the bundle administrator.
MembershipLevel	The ID and URL of the membership level used to create the bundle.
SpaceLeft	The number of spaces left in the bundle.
Members	The contact ID and contact URL of each member in the bundle. This field is only returned when the request is sent using a bundle ID.
ID	The bundle ID.
URL	The address of the API request for the bundle.

Sample JSON response

```
{
  "Email": "jdixon@test.com",
  "ParticipantsCount": 1,
  "Administrator": {
    "Id": 725186,
    "Url": "http://api.wildapricot.org/v2/accounts/42353/Contacts/725186"
  },
  "MembershipLevel": {
    "Id": 29881,
    "Url": "http://api.wildapricot.org/v2/accounts/42353/MembershipLevels/29881"
  },
  "SpaceLeft": 24,
  "Members": [
    {
      "Id": 725186,
      "Url": "http://api.wildapricot.org/v2/accounts/42353/Contacts/725186"
    }
  ],
  "Id": 9086,
  "Url": "http://api.wildapricot.org/v2/accounts/42353/Bundles/9086"
}
```


Sample XML response


```
<Bundle xmlns:i="http://www.w3.org/2001/XMLSchema-instance"
xmlns="http://schemas.datacontract.org/2004/07/Bonasource.MembershipFS.PublicAPI.Mod
el.V2.Contacts">
  <Id xmlns="http://api.wildapricot.org">9086</Id>
  <Url
xmlns="http://api.wildapricot.org">http://api.wildapricot.org/v2/accounts/42353/Bund
les/9086</Url>
  <Administrator xmlns:d2p1="http://api.wildapricot.org">
    <d2p1:Id>725186</d2p1:Id>

<d2p1:Url>http://api.wildapricot.org/v2/accounts/42353/Contacts/725186</d2p1:Url>
  </Administrator>
  <Email>jdixon@test.com</Email>
  <Members xmlns:d2p1="http://api.wildapricot.org">
    <d2p1:LinkedResourceOfint>
      <d2p1:Id>725186</d2p1:Id>

<d2p1:Url>http://api.wildapricot.org/v2/accounts/42353/Contacts/725186</d2p1:Url>
    </d2p1:LinkedResourceOfint>
  </Members>
  <MembershipLevel xmlns:d2p1="http://api.wildapricot.org">
    <d2p1:Id>29881</d2p1:Id>

<d2p1:Url>http://api.wildapricot.org/v2/accounts/42353/MembershipLevels/29881</d2p1:
Url>
  </MembershipLevel>
  <ParticipantsCount>1</ParticipantsCount>
  <SpaceLeft>24</SpaceLeft>
</Bundle>
```


On this page:

See also:

- API V2 authentication
- API V2 calls

ContactFields API V2 call

ContactFields API V2 call

Wild Apricot's API is intended for use by developers with technical expertise. If you need assistance, we provide support via email o r through our Developers forum.

You can use the ContactFields API call to retrieve a detailed list of the common and membership fields in your Wild Apricot database , and well as additional system fields. Any of the fields returned by the ContactFields API call can be used to filter the results of the Contacts API V2 call .

Syntax

```
GET {baseAPIaddress}/v2/Accounts/{accountID}/ContactFields
```

Example

```
GET https://api.wildapricot.org/v2/Accounts/58293/ContactFields
```

Parameters

The following parameters are used within the ContactFields API call:

Variable	Description
{baseAPIaddress}	The base address of the API. For more information, see API access options.
{accountID}	The account identifier that appears on the Account and billing screen and is returned by the Accounts API V1 call.

Each API call must include an authentication information that verifies your account and prevents others from accessing your data. For more information, see Authenticating API access from a 3rd-party server or application or Authenticating API access from a Wild Apricot site page.

Response fields

Common and membership fields

For each common and membership field in your Wild Apricot database, the ContactFields API call retrieves the following information.

Field	Description

FieldName	The name of the field.
Type	The field type. Possible values and the corresponding field types as they appear in Wild Apricot are: *String* – text, multiline text *Number* – various system fields *Boolean* – rules and terms, various system fields *DateTime* – date *Choice* – radio buttons, dropdown, radio buttons with extra charge *MultipleChoice* – multiple choice, multiple choice with extra charge *CalculatedExtraCharge* – extra charge calculation
IsSystem	Whether the field is a system field – a common field that cannot be renamed or deleted. Possible values are *true* or *false*.
Access	The access setting for the field. Possible values are *Member* , *Nob ody* , and *Public* .
AdminOnly	Indicates whether the field is accessible to administrators only.
FieldInstructions	Any field instructions that have been entered for the field.
Description	The field description (for system fields only).
ExistsInLevels	The membership levels that are allowed to access the field.
AllowedValues	For multi-option fields – those with a field **Type** of *Choice* (radio buttons, dropdown, radio buttons with extra charge) or *MultipleChoi ce* (multiple choice, multiple choice with extra charge) – the ID and label of each individual option is returned. You can use either the option ID or option label within your filter criteria when retrieving contact records using the Contacts API V1 call.
Order	The position of the field within the field list.
MemberOnly	Indicates whether the field is a membership field.
IsBuiltIn	Indicates whether the field is a built-in system field – one that is internal to Wild Apricot and not displayed as a common field.
SystemCode	The system-defined code associated with the system field.
SupportSearch	Indicates whether the field can be used to filter the results of the Co ntacts API call.
IsEditable	Indicates whether the field can be modified using a Contacts API call .
RulesAndTermsInfo	For rules and terms fields, the terms of use text and the URL of the rules and terms document or page are displayed.

<table>
<tr>
<td>ExtraCharge</td>
<td>For extra charge calculation fields, the following information is displayed:
<table>
<tr><th>Field</th><th>Description</th></tr>
<tr><td>MultiplierType</td><td>Indicates whether the multiplie r is the unit cost (ItemPrice) or percentage (Percentage).</td></tr>
<tr><td>Multiplier</td><td>The decimal value of the multiplier.</td></tr>
<tr><td>MinAmount</td><td>The minimum number of items for ItemPrice multiplier types</td></tr>
<tr><td>MaxAmount</td><td>The maximum number of items for ItemPrice multiplier types</td></tr>
<tr><td>MinCharge</td><td>The minimum resulting charge for Percentage multiplier types</td></tr>
<tr><td>MaxCharge</td><td>The maximum resulting charge for Percentage multiplier types</td></tr>
</table>
</td>
</tr>
</table>

System fields

Information is also retrieved for the following system fields:

Field	Description	Type	Possible values
Archived	Indicates whether the contact record is archived.	Boolean	true, false
Access to profile by others	Indicates whether the **Show profile** option is enabled in this member's privacy settings.	Boolean	true, false
Balance	The current balance outstanding for this contact. If there is a balance due, then the value of this field will be negative.	Number	Any integer (positive or negative)
Creation date	The date and time the contact record was created.	DateTime	Any date using the format dd/mm/yyyy hh:mm:ss AM/PM
Donor	Indicates whether the contact has made at least one donation.	Boolean	true, false
Email delivery disabled	Indicates whether email delivery is disabled for this contact, either because no email address was specified or the delivery of emails was disabled.	Boolean	true, false
Event announcements	Indicates whether event announcements are enabled within the contact's email preferences.	Boolean	true, false

Event attendee	Indicates whether the contact has registered for at least one event.	Boolean	true, false
Group participation	The names of the member groups to which the member belongs. Multiple groups are separated by commas within the ContactFields API results. When using this field to filter results from the Contacts API V1 call, you can reference only one group at a time, though you can reference multiple groups separately then join the multiple criteria using logical operators (AND, OR).	String	Group name(s)
Last login date	The date and time the contact last logged in to their account. If the contact has never logged in, then the value of this field will be null.	DateTime	Any date using the format dd/mm/yyyy hh:mm:ss AM/PM
Level last changed	The date and time the contact's membership level was last changed. If the level has never been changed, then the value of this field will be null.	DateTime	Any date using the format dd/mm/yyyy hh:mm:ss AM/PM
Member	Indicates whether the contact is a member.	Boolean	true, false
Member emails and newsletters	Indicates whether manually sent emails are enabled within the contact's email preferences.	Boolean	true, false
Member ID	The ID of the contact as displayed on their contact record.	Number	Any integer
Member role	Indicates whether the contact is an individual member, a bundle member, or a bundle administrator.	String	BundleAdministrator, BundleMember, Individual
Member since	The date and time that the contact became a member.	DateTime	Any date using the format dd/mm/yyyy hh:mm:ss AM/PM
Membership level ID	The identifier of the membership level assigned to the contact (if any).	Number	Any integer
Membership status	The status of the contact's membership.	Choice	Active, Lapsed, PendingNew, PendingRenewal, PendingUpgrade
Notes	Any notes added to the contact's record.	String	Any alphanumeric characters

Profile last updated	The date and time that common fields, membership fields, or member group participation were last updated for the contact.	DateTime	Any date using the format dd/mm/yyyy hh:mm:ss AM/PM
Receiving emails disabled	Indicates whether the delivery of all emails was disabled from the contact's email preferences.	Boolean	true, false
Registered for specific event	Indicates whether the contact has registered for the specified event. The event can be specified as part of the filter criteria when filtering the results of the Contacts API call.		
Renewal due	The date of the member's next renewal date. Depending on the payment system server's timezone, the actual renewal may take place a day before or a day after the renewal date.	DateTime	Any date using the format : dd/mm/yyyy hh:mm:ss AM/PM (The time will always equal 00:00:00)
Renewal date last changed	The date and time the member's renewal date was last changed. If the date has never been changed, then the value of this field will be null.	DateTime	Any date using the format: dd/mm/yyyy hh:mm:ss AM/PM
Suspended member	Indicates whether the contact is a suspended member.	Boolean	true, false
Total donated	The total value of all donations made by this contact.	Number	Any integer

Sample JSON response

Click here to expand/collapse


```
[
  {
    "Access": "AdminOnly",
    "MemberOnly": false,
    "IsBuiltIn": true,
    "SystemCode": "IsArchived",
    "SupportSearch": true,
    "IsEditable": true,
    "IsSystem": true,
    "Description": "Indicates whether the contact record is archived.",
    "Order": 0,
    "FieldName": "Archived",
    "Type": "Boolean"
  },
  {
    "Access": "AdminOnly",
    "MemberOnly": false,
    "IsBuiltIn": true,
    "SystemCode": "IsDonor",
    "SupportSearch": true,
    "IsEditable": false,
    "IsSystem": true,
    "Description": "Indicates whether the contact has made donations at least
```

```
once.",
    "Order": 0,
    "FieldName": "Donor",
    "Type": "Boolean"
  },
  {
    "Access": "AdminOnly",
    "MemberOnly": false,
    "IsBuiltIn": true,
    "SystemCode": "IsEventAttendee",
    "SupportSearch": true,
    "IsEditable": false,
    "IsSystem": true,
    "Description": "Indicates whether the contact attended at least one event.",
    "Order": 0,
    "FieldName": "Event registrant",
    "Type": "Boolean"
  },
  {
    "Access": "AdminOnly",
    "MemberOnly": false,
    "IsBuiltIn": true,
    "SystemCode": "IsMember",
    "SupportSearch": true,
    "IsEditable": false,
    "IsSystem": true,
    "Description": "Indicates whether the contact is a member.",
    "Order": 0,
    "FieldName": "Member",
    "Type": "Boolean"
  },
  {
    "Access": "AdminOnly",
    "MemberOnly": false,
    "IsBuiltIn": true,
    "SystemCode": "IsSuspendedMember",
    "SupportSearch": true,
    "IsEditable": false,
    "IsSystem": true,
    "Description": "Indicates whether the contact is a suspended member.",
    "Order": 0,
    "FieldName": "Suspended member",
    "Type": "Boolean"
  },
  {
    "Access": "AdminOnly",
    "MemberOnly": false,
    "IsBuiltIn": true,
    "SystemCode": "Notes",
    "SupportSearch": true,
    "IsEditable": true,
    "IsSystem": true,
    "Description": "Any notes added to the contact's record.",
    "Order": 0,
    "FieldName": "Notes",
    "Type": "String"
  },
  {
    "Access": "AdminOnly",
```

```
    "MemberOnly": false,
    "IsBuiltIn": true,
    "SystemCode": "ReceiveEventReminders",
    "SupportSearch": true,
    "IsEditable": true,
    "IsSystem": true,
    "Description": "Indicates whether event announcements are enabled within the
contact's email preferences.",
    "Order": 0,
    "FieldName": "Event announcements",
    "Type": "Boolean"
  },
  {
    "Access": "AdminOnly",
    "MemberOnly": false,
    "IsBuiltIn": true,
    "SystemCode": "ReceiveNewsletters",
    "SupportSearch": true,
    "IsEditable": true,
    "IsSystem": true,
    "Description": "Indicates whether manually sent emails are enabled within the
contact's email preferences.",
    "Order": 0,
    "FieldName": "Member emails and newsletters",
    "Type": "Boolean"
  },
  {
    "Access": "AdminOnly",
    "MemberOnly": false,
    "IsBuiltIn": true,
    "SystemCode": "EmailDisabled",
    "SupportSearch": true,
    "IsEditable": false,
    "IsSystem": true,
    "Description": "Indicates whether email delivery is disabled for this
contact, either because no email address was specified or the delivery of emails
was disabled.",
    "Order": 0,
    "FieldName": "Email delivery disabled",
    "Type": "Boolean"
  },
  {
    "Access": "AdminOnly",
    "MemberOnly": false,
    "IsBuiltIn": true,
    "SystemCode": "RecievingEMailsDisabled",
    "SupportSearch": true,
    "IsEditable": false,
    "IsSystem": true,
    "Description": "Indicates whether the delivery of all emails was disabled
from the contact's email preferences.",
    "Order": 0,
    "FieldName": "Receiving emails disabled",
    "Type": "Boolean"
  },
  {
    "Access": "AdminOnly",
    "MemberOnly": false,
    "IsBuiltIn": true,
```

```
    "SystemCode": "Balance",
    "SupportSearch": true,
    "IsEditable": false,
    "IsSystem": true,
    "Description": "Balance",
    "Order": 0,
    "FieldName": "Balance",
    "Type": "Number"
  },
  {
    "Access": "AdminOnly",
    "MemberOnly": false,
    "IsBuiltIn": true,
    "SystemCode": "TotalDonated",
    "SupportSearch": true,
    "IsEditable": false,
    "IsSystem": true,
    "Description": "The total value of all donations made by this contact.",
    "Order": 0,
    "FieldName": "Total donated",
    "Type": "Number"
  },
  {
    "Access": "AdminOnly",
    "MemberOnly": false,
    "IsBuiltIn": true,
    "SystemCode": "RegistredForEvent",
    "SupportSearch": true,
    "IsEditable": false,
    "IsSystem": true,
    "Description": "Registered for specific event",
    "Order": 0,
    "FieldName": "Registered for specific event",
    "Type": "Number"
  },
  {
    "Access": "AdminOnly",
    "MemberOnly": false,
    "IsBuiltIn": true,
    "SystemCode": "LastUpdated",
    "SupportSearch": true,
    "IsEditable": false,
    "IsSystem": true,
    "Description": "The date and time the contact record was last updated.",
    "Order": 0,
    "FieldName": "Profile last updated",
    "Type": "DateTime"
  },
  {
    "Access": "AdminOnly",
    "MemberOnly": false,
    "IsBuiltIn": true,
    "SystemCode": "LastUpdatedBy",
    "SupportSearch": false,
    "IsEditable": false,
    "IsSystem": true,
    "Description": "Identifier of member, who last updated the contact.",
    "Order": 0,
    "FieldName": "Profile last updated by",
```

```
    "Type": "Number"
  },
  {
    "Access": "AdminOnly",
    "MemberOnly": false,
    "IsBuiltIn": true,
    "SystemCode": "CreationDate",
    "SupportSearch": true,
    "IsEditable": false,
    "IsSystem": true,
    "Description": "The date and time the contact record was created.",
    "Order": 0,
    "FieldName": "Creation date",
    "Type": "DateTime"
  },
  {
    "Access": "AdminOnly",
    "MemberOnly": false,
    "IsBuiltIn": true,
    "SystemCode": "LastLoginDate",
    "SupportSearch": true,
    "IsEditable": false,
    "IsSystem": true,
    "Description": "The date and time the contact last logged in to their
account.",
    "Order": 0,
    "FieldName": "Last login date",
    "Type": "DateTime"
  },
  {
    "Access": "AdminOnly",
    "MemberOnly": false,
    "IsBuiltIn": true,
    "SystemCode": "SystemRulesAndTermsAccepted",
    "SupportSearch": false,
    "IsEditable": false,
    "RulesAndTermsInfo": {
      "Text": null,
      "Link": "http://www.wildapricot.com/termsofuse.aspx"
    },
    "IsSystem": true,
    "Description": "Terms of use accepted",
    "Order": 0,
    "FieldName": "Terms of use accepted",
    "Type": "Boolean"
  },
  {
    "Access": "AdminOnly",
    "ExistsInLevels": [
      {
        "Id": 29877,
        "Url":
"http://api.wildapricot.org/v2/accounts/42353/MembershipLevels/29877"
      },
      {
        "Id": 29881,
        "Url":
"http://api.wildapricot.org/v2/accounts/42353/MembershipLevels/29881"
      },
```

```
      {
        "Id": 29880,
        "Url":
"http://api.wildapricot.org/v2/accounts/42353/MembershipLevels/29880"
      },
      {
        "Id": 29879,
        "Url":
"http://api.wildapricot.org/v2/accounts/42353/MembershipLevels/29879"
      },
      {
        "Id": 29878,
        "Url":
"http://api.wildapricot.org/v2/accounts/42353/MembershipLevels/29878"
      }
    ],
    "MemberOnly": true,
    "IsBuiltIn": true,
    "SystemCode": "MemberRole",
    "SupportSearch": true,
    "IsEditable": false,
    "IsSystem": true,
    "Description": "Indicates whether the contact is an individual member, a
bundle member, or a bundle administrator.",
    "Order": 0,
    "FieldName": "Member role",
    "Type": "MultipleChoice",
    "AllowedValues": [
      {
        "Id": 1,
        "Label": "Bundle administrator",
        "Value": "1",
        "SelectedByDefault": false,
        "Position": 0
      },
      {
        "Id": 2,
        "Label": "Bundle member",
        "Value": "2",
        "SelectedByDefault": false,
        "Position": 0
      },
      {
        "Id": 0,
        "Label": "Individual",
        "Value": "0",
        "SelectedByDefault": false,
        "Position": 0
      }
    ]
  },
  {
    "Access": "AdminOnly",
    "ExistsInLevels": [
      {
        "Id": 29877,
        "Url":
"http://api.wildapricot.org/v2/accounts/42353/MembershipLevels/29877"
      },
```

```
      {
        "Id": 29881,
        "Url": 
"http://api.wildapricot.org/v2/accounts/42353/MembershipLevels/29881"
      },
      {
        "Id": 29880,
        "Url": 
"http://api.wildapricot.org/v2/accounts/42353/MembershipLevels/29880"
      },
      {
        "Id": 29879,
        "Url": 
"http://api.wildapricot.org/v2/accounts/42353/MembershipLevels/29879"
      },
      {
        "Id": 29878,
        "Url": 
"http://api.wildapricot.org/v2/accounts/42353/MembershipLevels/29878"
      }
    ],
    "MemberOnly": true,
    "IsBuiltIn": true,
    "SystemCode": "MemberSince",
    "SupportSearch": true,
    "IsEditable": true,
    "IsSystem": true,
    "Description": "The date and time that the contact became a member.",
    "Order": 0,
    "FieldName": "Member since",
    "Type": "DateTime"
  },
  {
    "Access": "AdminOnly",
    "ExistsInLevels": [
      {
        "Id": 29877,
        "Url": 
"http://api.wildapricot.org/v2/accounts/42353/MembershipLevels/29877"
      },
      {
        "Id": 29881,
        "Url": 
"http://api.wildapricot.org/v2/accounts/42353/MembershipLevels/29881"
      },
      {
        "Id": 29880,
        "Url": 
"http://api.wildapricot.org/v2/accounts/42353/MembershipLevels/29880"
      },
      {
        "Id": 29879,
        "Url": 
"http://api.wildapricot.org/v2/accounts/42353/MembershipLevels/29879"
      },
      {
        "Id": 29878,
        "Url": 
"http://api.wildapricot.org/v2/accounts/42353/MembershipLevels/29878"
```

```
      }
    ],
    "MemberOnly": true,
    "IsBuiltIn": true,
    "SystemCode": "RenewalDue",
    "SupportSearch": true,
    "IsEditable": true,
    "IsSystem": true,
    "Description": "The date and time of the member's next renewal date.",
    "Order": 0,
    "FieldName": "Renewal due",
    "Type": "DateTime"
  },
  {
    "Access": "AdminOnly",
    "ExistsInLevels": [
      {
        "Id": 29877,
        "Url":
"http://api.wildapricot.org/v2/accounts/42353/MembershipLevels/29877"
      },
      {
        "Id": 29881,
        "Url":
"http://api.wildapricot.org/v2/accounts/42353/MembershipLevels/29881"
      },
      {
        "Id": 29880,
        "Url":
"http://api.wildapricot.org/v2/accounts/42353/MembershipLevels/29880"
      },
      {
        "Id": 29879,
        "Url":
"http://api.wildapricot.org/v2/accounts/42353/MembershipLevels/29879"
      },
      {
        "Id": 29878,
        "Url":
"http://api.wildapricot.org/v2/accounts/42353/MembershipLevels/29878"
      }
    ],
    "MemberOnly": true,
    "IsBuiltIn": true,
    "SystemCode": "MembershipLevelId",
    "SupportSearch": true,
    "IsEditable": false,
    "IsSystem": true,
    "Description": "The identifier of the membership level assigned to the
contact (if any).",
    "Order": 0,
    "FieldName": "Membership level ID",
    "Type": "Number"
  },
  {
    "Access": "AdminOnly",
    "ExistsInLevels": [
      {
        "Id": 29877,
```

```
        "Url":
"http://api.wildapricot.org/v2/accounts/42353/MembershipLevels/29877"
      },
      {
        "Id": 29881,
        "Url":
"http://api.wildapricot.org/v2/accounts/42353/MembershipLevels/29881"
      },
      {
        "Id": 29880,
        "Url":
"http://api.wildapricot.org/v2/accounts/42353/MembershipLevels/29880"
      },
      {
        "Id": 29879,
        "Url":
"http://api.wildapricot.org/v2/accounts/42353/MembershipLevels/29879"
      },
      {
        "Id": 29878,
        "Url":
"http://api.wildapricot.org/v2/accounts/42353/MembershipLevels/29878"
      }
    ],
    "MemberOnly": true,
    "IsBuiltIn": true,
    "SystemCode": "AccessToProfileByOthers",
    "SupportSearch": true,
    "IsEditable": true,
    "IsSystem": true,
    "Description": "Indicates whether the Show profile option is enabled in this
member's privacy settings.",
    "Order": 0,
    "FieldName": "Access to profile by others",
    "Type": "Boolean"
  },
  {
    "Access": "AdminOnly",
    "ExistsInLevels": [
      {
        "Id": 29877,
        "Url":
"http://api.wildapricot.org/v2/accounts/42353/MembershipLevels/29877"
      },
      {
        "Id": 29881,
        "Url":
"http://api.wildapricot.org/v2/accounts/42353/MembershipLevels/29881"
      },
      {
        "Id": 29880,
        "Url":
"http://api.wildapricot.org/v2/accounts/42353/MembershipLevels/29880"
      },
      {
        "Id": 29879,
        "Url":
"http://api.wildapricot.org/v2/accounts/42353/MembershipLevels/29879"
      },
```

```
      {
        "Id": 29878,
        "Url":
"http://api.wildapricot.org/v2/accounts/42353/MembershipLevels/29878"
      }
    ],
    "MemberOnly": true,
    "IsBuiltIn": true,
    "SystemCode": "RenewalDateLastChanged",
    "SupportSearch": true,
    "IsEditable": false,
    "IsSystem": true,
    "Description": "The date and time the member's renewal date was last
changed.",
    "Order": 0,
    "FieldName": "Renewal date last changed",
    "Type": "DateTime"
  },
  {
    "Access": "AdminOnly",
    "ExistsInLevels": [
      {
        "Id": 29877,
        "Url":
"http://api.wildapricot.org/v2/accounts/42353/MembershipLevels/29877"
      },
      {
        "Id": 29881,
        "Url":
"http://api.wildapricot.org/v2/accounts/42353/MembershipLevels/29881"
      },
      {
        "Id": 29880,
        "Url":
"http://api.wildapricot.org/v2/accounts/42353/MembershipLevels/29880"
      },
      {
        "Id": 29879,
        "Url":
"http://api.wildapricot.org/v2/accounts/42353/MembershipLevels/29879"
      },
      {
        "Id": 29878,
        "Url":
"http://api.wildapricot.org/v2/accounts/42353/MembershipLevels/29878"
      }
    ],
    "MemberOnly": true,
    "IsBuiltIn": true,
    "SystemCode": "LevelLastChanged",
    "SupportSearch": true,
    "IsEditable": false,
    "IsSystem": true,
    "Description": "The date and time the contact's membership level was last
changed",
    "Order": 0,
    "FieldName": "Level last changed",
    "Type": "DateTime"
  },
```

```
  {
    "Access": "AdminOnly",
    "ExistsInLevels": [
      {
        "Id": 29877,
        "Url":
"http://api.wildapricot.org/v2/accounts/42353/MembershipLevels/29877"
      },
      {
        "Id": 29881,
        "Url":
"http://api.wildapricot.org/v2/accounts/42353/MembershipLevels/29881"
      },
      {
        "Id": 29880,
        "Url":
"http://api.wildapricot.org/v2/accounts/42353/MembershipLevels/29880"
      },
      {
        "Id": 29879,
        "Url":
"http://api.wildapricot.org/v2/accounts/42353/MembershipLevels/29879"
      },
      {
        "Id": 29878,
        "Url":
"http://api.wildapricot.org/v2/accounts/42353/MembershipLevels/29878"
      }
    ],
    "MemberOnly": true,
    "IsBuiltIn": true,
    "SystemCode": "BundleId",
    "SupportSearch": false,
    "IsEditable": false,
    "IsSystem": true,
    "Description": "Bundle ID which member belongs to",
    "Order": 0,
    "FieldName": "Bundle ID",
    "Type": "Number"
  },
  {
    "Access": "AdminOnly",
    "ExistsInLevels": [
      {
        "Id": 29877,
        "Url":
"http://api.wildapricot.org/v2/accounts/42353/MembershipLevels/29877"
      },
      {
        "Id": 29881,
        "Url":
"http://api.wildapricot.org/v2/accounts/42353/MembershipLevels/29881"
      },
      {
        "Id": 29880,
        "Url":
"http://api.wildapricot.org/v2/accounts/42353/MembershipLevels/29880"
      },
      {
```

```
        "Id": 29879,
        "Url":
"http://api.wildapricot.org/v2/accounts/42353/MembershipLevels/29879"
      },
      {
        "Id": 29878,
        "Url":
"http://api.wildapricot.org/v2/accounts/42353/MembershipLevels/29878"
      }
    ],
    "MemberOnly": true,
    "IsBuiltIn": true,
    "SystemCode": "Status",
    "SupportSearch": true,
    "IsEditable": true,
    "IsSystem": true,
    "Description": "The status of the contact's membership.",
    "Order": 0,
    "FieldName": "Membership status",
    "Type": "Choice",
    "AllowedValues": [
      {
        "Id": 1,
        "Label": "Active",
        "Value": "Active",
        "SelectedByDefault": false,
        "Position": 0
      },
      {
        "Id": 2,
        "Label": "Lapsed",
        "Value": "Lapsed",
        "SelectedByDefault": false,
        "Position": 0
      },
      {
        "Id": 20,
        "Label": "PendingNew",
        "Value": "PendingNew",
        "SelectedByDefault": false,
        "Position": 0
      },
      {
        "Id": 3,
        "Label": "PendingRenewal",
        "Value": "PendingRenewal",
        "SelectedByDefault": false,
        "Position": 0
      },
      {
        "Id": 30,
        "Label": "PendingUpgrade",
        "Value": "PendingUpgrade",
        "SelectedByDefault": false,
        "Position": 0
      }
    ]
  },
  {
```

```
    "Access": "AdminOnly",
    "MemberOnly": false,
    "IsBuiltIn": false,
    "SystemCode": "MemberId",
    "SupportSearch": true,
    "IsEditable": false,
    "IsSystem": true,
    "FieldInstructions": "",
    "Description": "This is a read-only system field used to uniquely identify
the member or contact.",
    "Order": 0,
    "FieldName": "Member ID",
    "Type": "Number"
  },
  {
    "Access": "Public",
    "MemberOnly": false,
    "IsBuiltIn": false,
    "SystemCode": "FirstName",
    "SupportSearch": true,
    "IsEditable": true,
    "IsSystem": true,
    "FieldInstructions": "",
    "Description": "This is a system field (first name).   It cannot be
deleted.",
    "Order": 1,
    "FieldName": "First name",
    "Type": "String"
  },
  {
    "Access": "Public",
    "MemberOnly": false,
    "IsBuiltIn": false,
    "SystemCode": "LastName",
    "SupportSearch": true,
    "IsEditable": true,
    "IsSystem": true,
    "FieldInstructions": "",
    "Description": "This is a system field (last name).  It cannot be deleted.",
    "Order": 2,
    "FieldName": "Last name",
    "Type": "String"
  },
  {
    "Access": "Public",
    "MemberOnly": false,
    "IsBuiltIn": false,
    "SystemCode": "Organization",
    "SupportSearch": true,
    "IsEditable": true,
    "IsSystem": true,
    "FieldInstructions": "",
    "Description": "This is a system field (organization).  It cannot be
deleted.",
    "Order": 3,
    "FieldName": "Organization",
    "Type": "String"
  },
  {
```

```
    "Access": "Public",
    "MemberOnly": false,
    "IsBuiltIn": false,
    "SystemCode": "Email",
    "SupportSearch": true,
    "IsEditable": true,
    "IsSystem": true,
    "FieldInstructions": "",
    "Description": "This is a system field (email).   It is mandatory for online
self-service transactions and cannot be deleted.",
    "Order": 4,
    "FieldName": "e-Mail",
    "Type": "String"
  },
  {
    "Access": "Public",
    "MemberOnly": false,
    "IsBuiltIn": false,
    "SystemCode": "Phone",
    "SupportSearch": true,
    "IsEditable": true,
    "IsSystem": true,
    "FieldInstructions": "",
    "Description": "This is a system field (phone).  It cannot be deleted.",
    "Order": 5,
    "FieldName": "Phone",
    "Type": "String"
  },
  {
    "Access": "AdminOnly",
    "MemberOnly": false,
    "IsBuiltIn": false,
    "SupportSearch": true,
    "IsEditable": true,
    "IsSystem": false,
    "FieldInstructions": "",
    "Order": 6,
    "FieldName": "State/Province",
    "Type": "Choice",
    "AllowedValues": [
      {
        "Id": -2147483648,
        "Label": null
      },
      {
        "Id": 137435,
        "Label": "California",
        "Value": "137435",
        "SelectedByDefault": false,
        "Position": 0
      },
      {
        "Id": 137436,
        "Label": "New York",
        "Value": "137436",
        "SelectedByDefault": false,
        "Position": 1
      },
      {
```

```
      "Id": 137437,
      "Label": "Ontario",
      "Value": "137437",
      "SelectedByDefault": false,
      "Position": 2
    },
    {
      "Id": 137438,
      "Label": "Florida",
      "Value": "137438",
      "SelectedByDefault": false,
      "Position": 3
    },
    {
      "Id": 137439,
      "Label": "Quebec",
      "Value": "137439",
      "SelectedByDefault": false,
      "Position": 4
    },
    {
      "Id": 137440,
      "Label": "Vermont",
      "Value": "137440",
      "SelectedByDefault": false,
      "Position": 5
    },
    {
      "Id": 137441,
      "Label": "Maine",
      "Value": "137441",
      "SelectedByDefault": false,
      "Position": 6
    },
    {
      "Id": 137442,
      "Label": "Nevada",
      "Value": "137442",
      "SelectedByDefault": false,
      "Position": 7
    },
    {
      "Id": 137443,
      "Label": "British Columbia",
      "Value": "137443",
      "SelectedByDefault": false,
      "Position": 8
    },
    {
      "Id": 137444,
      "Label": "Manitoba",
      "Value": "137444",
      "SelectedByDefault": false,
      "Position": 9
    },
    {
      "Id": 137445,
      "Label": "Michigan",
      "Value": "137445",
```

```
      "SelectedByDefault": false,
      "Position": 10
    },
    {
      "Id": 137446,
      "Label": "Ohio",
      "Value": "137446",
      "SelectedByDefault": false,
      "Position": 11
    },
    {
      "Id": 137447,
      "Label": "Washington",
      "Value": "137447",
      "SelectedByDefault": false,
      "Position": 12
    },
    {
      "Id": 137448,
      "Label": "Nebraska",
      "Value": "137448",
      "SelectedByDefault": false,
      "Position": 13
    },
    {
      "Id": 137449,
      "Label": "Prince Edward Island",
      "Value": "137449",
      "SelectedByDefault": false,
      "Position": 14
    },
    {
      "Id": 137450,
      "Label": "Hawaii",
      "Value": "137450",
      "SelectedByDefault": false,
      "Position": 15
    },
    {
      "Id": 137451,
      "Label": "Texas",
      "Value": "137451",
      "SelectedByDefault": false,
      "Position": 16
    },
    {
      "Id": 137452,
      "Label": "Wisconsin",
      "Value": "137452",
      "SelectedByDefault": false,
      "Position": 17
    },
    {
      "Id": 137453,
      "Label": "Alaska",
      "Value": "137453",
      "SelectedByDefault": false,
      "Position": 18
    }
```

```
    ]
  },
  {
    "Access": "Members",
    "MemberOnly": false,
    "IsBuiltIn": false,
    "SupportSearch": true,
    "IsEditable": true,
    "IsSystem": false,
    "FieldInstructions": "",
    "Order": 8,
    "FieldName": "Member only",
    "Type": "String"
  },
  {
    "Access": "Public",
    "MemberOnly": true,
    "IsBuiltIn": false,
    "SupportSearch": true,
    "IsEditable": true,
    "IsSystem": false,
    "FieldInstructions": "",
    "Order": 1,
    "FieldName": "Job title",
    "Type": "String"
  },
  {
    "Access": "Public",
    "MemberOnly": true,
    "IsBuiltIn": false,
    "SupportSearch": true,
    "IsEditable": true,
    "IsSystem": false,
    "FieldInstructions": "",
    "Order": 2,
    "FieldName": "Website",
    "Type": "String"
  },
  {
    "Access": "Public",
    "MemberOnly": true,
    "IsBuiltIn": false,
    "SupportSearch": true,
    "IsEditable": true,
    "IsSystem": false,
    "FieldInstructions": "",
    "Order": 4,
    "FieldName": "Address",
    "Type": "String"
  },
  {
    "Access": "Public",
    "MemberOnly": true,
    "IsBuiltIn": false,
    "SupportSearch": true,
    "IsEditable": true,
    "IsSystem": false,
    "FieldInstructions": "",
    "Order": 5,
```

```
    "FieldName": "City",
    "Type": "String"
  },
  {
    "Access": "Public",
    "MemberOnly": true,
    "IsBuiltIn": false,
    "SupportSearch": true,
    "IsEditable": true,
    "IsSystem": false,
    "FieldInstructions": "",
    "Order": 6,
    "FieldName": "Postal code",
    "Type": "String"
  },
  {
    "Access": "Public",
    "MemberOnly": true,
    "IsBuiltIn": false,
    "SupportSearch": true,
    "IsEditable": true,
    "IsSystem": false,
    "FieldInstructions": "",
    "Order": 7,
    "FieldName": "Province/State",
    "Type": "String"
  },
  {
    "Access": "Public",
    "MemberOnly": true,
    "IsBuiltIn": false,
    "SupportSearch": true,
    "IsEditable": true,
    "IsSystem": false,
    "FieldInstructions": "",
    "Order": 8,
    "FieldName": "Country",
    "Type": "String"
  },
  {
    "Access": "AdminOnly",
    "MemberOnly": true,
    "IsBuiltIn": false,
    "SystemCode": "Groups",
    "SupportSearch": true,
    "IsEditable": true,
    "IsSystem": true,
    "FieldInstructions": "",
    "Order": 10,
    "FieldName": "Groups",
    "Type": "MultipleChoice",
    "AllowedValues": [
      {
        "Id": 505,
        "Label": "Board members",
        "Value": "505",
        "SelectedByDefault": false,
        "Position": 0
      },
```

```
      {
        "Id": 507,
        "Label": "Mailing list",
        "Value": "507",
        "SelectedByDefault": false,
        "Position": 0
      },
      {
        "Id": 506,
        "Label": "Volunteer committee",
        "Value": "506",
        "SelectedByDefault": false,
        "Position": 0
      }
    ]
  },
  {
    "Access": "Public",
    "MemberOnly": true,
    "IsBuiltIn": false,
    "SupportSearch": true,
    "IsEditable": true,
    "IsSystem": false,
    "FieldInstructions": "",
    "Order": 11,
    "FieldName": "Directory listing text",
    "Type": "String"
  },
  {
    "Access": "Members",
    "MemberOnly": true,
    "IsBuiltIn": false,
    "SupportSearch": true,
    "IsEditable": true,
    "IsSystem": false,
    "FieldInstructions": "",
    "Order": 12,
    "FieldName": "Member only 2",
    "Type": "String"
```

```
  }
]
```

Sample XML response

Click here to expand/collapse


```
<ArrayOfContactFieldDescription
xmlns:i="http://www.w3.org/2001/XMLSchema-instance"
xmlns="http://schemas.datacontract.org/2004/07/Bonasource.MembershipFS.PublicAPI.
Model.V2.Contacts">
  <ContactFieldDescription>
    <AllowedValues i:nil="true" xmlns="http://api.wildapricot.org" />
    <FieldName xmlns="http://api.wildapricot.org">Archived</FieldName>
    <SystemName i:nil="true" xmlns="http://api.wildapricot.org" />
    <Type xmlns="http://api.wildapricot.org">Boolean</Type>
    <Description xmlns="http://api.wildapricot.org">Indicates whether the contact
record is archived.</Description>
    <FieldInstructions i:nil="true" xmlns="http://api.wildapricot.org" />
    <IsSystem xmlns="http://api.wildapricot.org">true</IsSystem>
    <Order xmlns="http://api.wildapricot.org">0</Order>
    <Access>AdminOnly</Access>
    <ExistsInLevels xmlns:d3p1="http://api.wildapricot.org" i:nil="true" />
    <IsBuiltIn>true</IsBuiltIn>
    <IsEditable>true</IsEditable>
    <MemberOnly>false</MemberOnly>
    <RulesAndTermsInfo i:nil="true" />
    <SupportSearch>true</SupportSearch>
    <SystemCode>IsArchived</SystemCode>
  </ContactFieldDescription>
  <ContactFieldDescription>
    <AllowedValues i:nil="true" xmlns="http://api.wildapricot.org" />
    <FieldName xmlns="http://api.wildapricot.org">Donor</FieldName>
    <SystemName i:nil="true" xmlns="http://api.wildapricot.org" />
    <Type xmlns="http://api.wildapricot.org">Boolean</Type>
    <Description xmlns="http://api.wildapricot.org">Indicates whether the contact
has made donations at least once.</Description>
    <FieldInstructions i:nil="true" xmlns="http://api.wildapricot.org" />
    <IsSystem xmlns="http://api.wildapricot.org">true</IsSystem>
    <Order xmlns="http://api.wildapricot.org">0</Order>
    <Access>AdminOnly</Access>
    <ExistsInLevels xmlns:d3p1="http://api.wildapricot.org" i:nil="true" />
    <IsBuiltIn>true</IsBuiltIn>
    <IsEditable>false</IsEditable>
    <MemberOnly>false</MemberOnly>
    <RulesAndTermsInfo i:nil="true" />
    <SupportSearch>true</SupportSearch>
    <SystemCode>IsDonor</SystemCode>
  </ContactFieldDescription>
  <ContactFieldDescription>
    <AllowedValues i:nil="true" xmlns="http://api.wildapricot.org" />
    <FieldName xmlns="http://api.wildapricot.org">Event registrant</FieldName>
    <SystemName i:nil="true" xmlns="http://api.wildapricot.org" />
    <Type xmlns="http://api.wildapricot.org">Boolean</Type>
```

```
    <Description xmlns="http://api.wildapricot.org">Indicates whether the contact
attended at least one event.</Description>
    <FieldInstructions i:nil="true" xmlns="http://api.wildapricot.org" />
    <IsSystem xmlns="http://api.wildapricot.org">true</IsSystem>
    <Order xmlns="http://api.wildapricot.org">0</Order>
    <Access>AdminOnly</Access>
    <ExistsInLevels xmlns:d3p1="http://api.wildapricot.org" i:nil="true" />
    <IsBuiltIn>true</IsBuiltIn>
    <IsEditable>false</IsEditable>
    <MemberOnly>false</MemberOnly>
    <RulesAndTermsInfo i:nil="true" />
    <SupportSearch>true</SupportSearch>
    <SystemCode>IsEventAttendee</SystemCode>
  </ContactFieldDescription>
  <ContactFieldDescription>
    <AllowedValues i:nil="true" xmlns="http://api.wildapricot.org" />
    <FieldName xmlns="http://api.wildapricot.org">Member</FieldName>
    <SystemName i:nil="true" xmlns="http://api.wildapricot.org" />
    <Type xmlns="http://api.wildapricot.org">Boolean</Type>
    <Description xmlns="http://api.wildapricot.org">Indicates whether the contact
is a member.</Description>
    <FieldInstructions i:nil="true" xmlns="http://api.wildapricot.org" />
    <IsSystem xmlns="http://api.wildapricot.org">true</IsSystem>
    <Order xmlns="http://api.wildapricot.org">0</Order>
    <Access>AdminOnly</Access>
    <ExistsInLevels xmlns:d3p1="http://api.wildapricot.org" i:nil="true" />
    <IsBuiltIn>true</IsBuiltIn>
    <IsEditable>false</IsEditable>
    <MemberOnly>false</MemberOnly>
    <RulesAndTermsInfo i:nil="true" />
    <SupportSearch>true</SupportSearch>
    <SystemCode>IsMember</SystemCode>
  </ContactFieldDescription>
  <ContactFieldDescription>
    <AllowedValues i:nil="true" xmlns="http://api.wildapricot.org" />
    <FieldName xmlns="http://api.wildapricot.org">Suspended member</FieldName>
    <SystemName i:nil="true" xmlns="http://api.wildapricot.org" />
    <Type xmlns="http://api.wildapricot.org">Boolean</Type>
    <Description xmlns="http://api.wildapricot.org">Indicates whether the contact
is a suspended member.</Description>
    <FieldInstructions i:nil="true" xmlns="http://api.wildapricot.org" />
    <IsSystem xmlns="http://api.wildapricot.org">true</IsSystem>
    <Order xmlns="http://api.wildapricot.org">0</Order>
    <Access>AdminOnly</Access>
    <ExistsInLevels xmlns:d3p1="http://api.wildapricot.org" i:nil="true" />
    <IsBuiltIn>true</IsBuiltIn>
    <IsEditable>false</IsEditable>
    <MemberOnly>false</MemberOnly>
    <RulesAndTermsInfo i:nil="true" />
    <SupportSearch>true</SupportSearch>
    <SystemCode>IsSuspendedMember</SystemCode>
  </ContactFieldDescription>
  <ContactFieldDescription>
    <AllowedValues i:nil="true" xmlns="http://api.wildapricot.org" />
    <FieldName xmlns="http://api.wildapricot.org">Notes</FieldName>
    <SystemName i:nil="true" xmlns="http://api.wildapricot.org" />
    <Type xmlns="http://api.wildapricot.org">String</Type>
    <Description xmlns="http://api.wildapricot.org">Any notes added to the
contact's record.</Description>
```

```
    <FieldInstructions i:nil="true" xmlns="http://api.wildapricot.org" />
    <IsSystem xmlns="http://api.wildapricot.org">true</IsSystem>
    <Order xmlns="http://api.wildapricot.org">0</Order>
    <Access>AdminOnly</Access>
    <ExistsInLevels xmlns:d3p1="http://api.wildapricot.org" i:nil="true" />
    <IsBuiltIn>true</IsBuiltIn>
    <IsEditable>true</IsEditable>
    <MemberOnly>false</MemberOnly>
    <RulesAndTermsInfo i:nil="true" />
    <SupportSearch>true</SupportSearch>
    <SystemCode>Notes</SystemCode>
  </ContactFieldDescription>
  <ContactFieldDescription>
    <AllowedValues i:nil="true" xmlns="http://api.wildapricot.org" />
    <FieldName xmlns="http://api.wildapricot.org">Event announcements</FieldName>
    <SystemName i:nil="true" xmlns="http://api.wildapricot.org" />
    <Type xmlns="http://api.wildapricot.org">Boolean</Type>
    <Description xmlns="http://api.wildapricot.org">Indicates whether event
announcements are enabled within the contact's email preferences.</Description>
    <FieldInstructions i:nil="true" xmlns="http://api.wildapricot.org" />
    <IsSystem xmlns="http://api.wildapricot.org">true</IsSystem>
    <Order xmlns="http://api.wildapricot.org">0</Order>
    <Access>AdminOnly</Access>
    <ExistsInLevels xmlns:d3p1="http://api.wildapricot.org" i:nil="true" />
    <IsBuiltIn>true</IsBuiltIn>
    <IsEditable>true</IsEditable>
    <MemberOnly>false</MemberOnly>
    <RulesAndTermsInfo i:nil="true" />
    <SupportSearch>true</SupportSearch>
    <SystemCode>ReceiveEventReminders</SystemCode>
  </ContactFieldDescription>
  <ContactFieldDescription>
    <AllowedValues i:nil="true" xmlns="http://api.wildapricot.org" />
    <FieldName xmlns="http://api.wildapricot.org">Member emails and
newsletters</FieldName>
    <SystemName i:nil="true" xmlns="http://api.wildapricot.org" />
    <Type xmlns="http://api.wildapricot.org">Boolean</Type>
    <Description xmlns="http://api.wildapricot.org">Indicates whether manually
sent emails are enabled within the contact's email preferences.</Description>
    <FieldInstructions i:nil="true" xmlns="http://api.wildapricot.org" />
    <IsSystem xmlns="http://api.wildapricot.org">true</IsSystem>
    <Order xmlns="http://api.wildapricot.org">0</Order>
    <Access>AdminOnly</Access>
    <ExistsInLevels xmlns:d3p1="http://api.wildapricot.org" i:nil="true" />
    <IsBuiltIn>true</IsBuiltIn>
    <IsEditable>true</IsEditable>
    <MemberOnly>false</MemberOnly>
    <RulesAndTermsInfo i:nil="true" />
    <SupportSearch>true</SupportSearch>
    <SystemCode>ReceiveNewsletters</SystemCode>
  </ContactFieldDescription>
  <ContactFieldDescription>
    <AllowedValues i:nil="true" xmlns="http://api.wildapricot.org" />
    <FieldName xmlns="http://api.wildapricot.org">Email delivery
disabled</FieldName>
    <SystemName i:nil="true" xmlns="http://api.wildapricot.org" />
    <Type xmlns="http://api.wildapricot.org">Boolean</Type>
    <Description xmlns="http://api.wildapricot.org">Indicates whether email
delivery is disabled for this contact, either because no email address was
```

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specified or the delivery of emails was disabled.&lt;/Description&gt;
    &lt;FieldInstructions i:nil="true" xmlns="http://api.wildapricot.org" /&gt;
    &lt;IsSystem xmlns="http://api.wildapricot.org"&gt;true&lt;/IsSystem&gt;
    &lt;Order xmlns="http://api.wildapricot.org"&gt;0&lt;/Order&gt;
    &lt;Access&gt;AdminOnly&lt;/Access&gt;
    &lt;ExistsInLevels xmlns:d3p1="http://api.wildapricot.org" i:nil="true" /&gt;
    &lt;IsBuiltIn&gt;true&lt;/IsBuiltIn&gt;
    &lt;IsEditable&gt;false&lt;/IsEditable&gt;
    &lt;MemberOnly&gt;false&lt;/MemberOnly&gt;
    &lt;RulesAndTermsInfo i:nil="true" /&gt;
    &lt;SupportSearch&gt;true&lt;/SupportSearch&gt;
    &lt;SystemCode&gt;EmailDisabled&lt;/SystemCode&gt;
  &lt;/ContactFieldDescription&gt;
  &lt;ContactFieldDescription&gt;
    &lt;AllowedValues i:nil="true" xmlns="http://api.wildapricot.org" /&gt;
    &lt;FieldName xmlns="http://api.wildapricot.org"&gt;Receiving emails
disabled&lt;/FieldName&gt;
    &lt;SystemName i:nil="true" xmlns="http://api.wildapricot.org" /&gt;
    &lt;Type xmlns="http://api.wildapricot.org"&gt;Boolean&lt;/Type&gt;
    &lt;Description xmlns="http://api.wildapricot.org"&gt;Indicates whether the
delivery of all emails was disabled from the contact's email
preferences.&lt;/Description&gt;
    &lt;FieldInstructions i:nil="true" xmlns="http://api.wildapricot.org" /&gt;
    &lt;IsSystem xmlns="http://api.wildapricot.org"&gt;true&lt;/IsSystem&gt;
    &lt;Order xmlns="http://api.wildapricot.org"&gt;0&lt;/Order&gt;
    &lt;Access&gt;AdminOnly&lt;/Access&gt;
    &lt;ExistsInLevels xmlns:d3p1="http://api.wildapricot.org" i:nil="true" /&gt;
    &lt;IsBuiltIn&gt;true&lt;/IsBuiltIn&gt;
    &lt;IsEditable&gt;false&lt;/IsEditable&gt;
    &lt;MemberOnly&gt;false&lt;/MemberOnly&gt;
    &lt;RulesAndTermsInfo i:nil="true" /&gt;
    &lt;SupportSearch&gt;true&lt;/SupportSearch&gt;
    &lt;SystemCode&gt;RecievingEMailsDisabled&lt;/SystemCode&gt;
  &lt;/ContactFieldDescription&gt;
  &lt;ContactFieldDescription&gt;
    &lt;AllowedValues i:nil="true" xmlns="http://api.wildapricot.org" /&gt;
    &lt;FieldName xmlns="http://api.wildapricot.org"&gt;Balance&lt;/FieldName&gt;
    &lt;SystemName i:nil="true" xmlns="http://api.wildapricot.org" /&gt;
    &lt;Type xmlns="http://api.wildapricot.org"&gt;Number&lt;/Type&gt;
    &lt;Description xmlns="http://api.wildapricot.org"&gt;Balance&lt;/Description&gt;
    &lt;FieldInstructions i:nil="true" xmlns="http://api.wildapricot.org" /&gt;
    &lt;IsSystem xmlns="http://api.wildapricot.org"&gt;true&lt;/IsSystem&gt;
    &lt;Order xmlns="http://api.wildapricot.org"&gt;0&lt;/Order&gt;
    &lt;Access&gt;AdminOnly&lt;/Access&gt;
    &lt;ExistsInLevels xmlns:d3p1="http://api.wildapricot.org" i:nil="true" /&gt;
    &lt;IsBuiltIn&gt;true&lt;/IsBuiltIn&gt;
    &lt;IsEditable&gt;false&lt;/IsEditable&gt;
    &lt;MemberOnly&gt;false&lt;/MemberOnly&gt;
    &lt;RulesAndTermsInfo i:nil="true" /&gt;
    &lt;SupportSearch&gt;true&lt;/SupportSearch&gt;
    &lt;SystemCode&gt;Balance&lt;/SystemCode&gt;
  &lt;/ContactFieldDescription&gt;
  &lt;ContactFieldDescription&gt;
    &lt;AllowedValues i:nil="true" xmlns="http://api.wildapricot.org" /&gt;
    &lt;FieldName xmlns="http://api.wildapricot.org"&gt;Total donated&lt;/FieldName&gt;
    &lt;SystemName i:nil="true" xmlns="http://api.wildapricot.org" /&gt;
    &lt;Type xmlns="http://api.wildapricot.org"&gt;Number&lt;/Type&gt;
    &lt;Description xmlns="http://api.wildapricot.org"&gt;The total value of all
donations made by this contact.&lt;/Description&gt;
```

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    <FieldInstructions i:nil="true" xmlns="http://api.wildapricot.org" />
    <IsSystem xmlns="http://api.wildapricot.org">true</IsSystem>
    <Order xmlns="http://api.wildapricot.org">0</Order>
    <Access>AdminOnly</Access>
    <ExistsInLevels xmlns:d3p1="http://api.wildapricot.org" i:nil="true" />
    <IsBuiltIn>true</IsBuiltIn>
    <IsEditable>false</IsEditable>
    <MemberOnly>false</MemberOnly>
    <RulesAndTermsInfo i:nil="true" />
    <SupportSearch>true</SupportSearch>
    <SystemCode>TotalDonated</SystemCode>
  </ContactFieldDescription>
  <ContactFieldDescription>
    <AllowedValues i:nil="true" xmlns="http://api.wildapricot.org" />
    <FieldName xmlns="http://api.wildapricot.org">Registered for specific
event</FieldName>
    <SystemName i:nil="true" xmlns="http://api.wildapricot.org" />
    <Type xmlns="http://api.wildapricot.org">Number</Type>
    <Description xmlns="http://api.wildapricot.org">Registered for specific
event</Description>
    <FieldInstructions i:nil="true" xmlns="http://api.wildapricot.org" />
    <IsSystem xmlns="http://api.wildapricot.org">true</IsSystem>
    <Order xmlns="http://api.wildapricot.org">0</Order>
    <Access>AdminOnly</Access>
    <ExistsInLevels xmlns:d3p1="http://api.wildapricot.org" i:nil="true" />
    <IsBuiltIn>true</IsBuiltIn>
    <IsEditable>false</IsEditable>
    <MemberOnly>false</MemberOnly>
    <RulesAndTermsInfo i:nil="true" />
    <SupportSearch>true</SupportSearch>
    <SystemCode>RegistredForEvent</SystemCode>
  </ContactFieldDescription>
  <ContactFieldDescription>
    <AllowedValues i:nil="true" xmlns="http://api.wildapricot.org" />
    <FieldName xmlns="http://api.wildapricot.org">Profile last
updated</FieldName>
    <SystemName i:nil="true" xmlns="http://api.wildapricot.org" />
    <Type xmlns="http://api.wildapricot.org">DateTime</Type>
    <Description xmlns="http://api.wildapricot.org">The date and time the contact
record was last updated.</Description>
    <FieldInstructions i:nil="true" xmlns="http://api.wildapricot.org" />
    <IsSystem xmlns="http://api.wildapricot.org">true</IsSystem>
    <Order xmlns="http://api.wildapricot.org">0</Order>
    <Access>AdminOnly</Access>
    <ExistsInLevels xmlns:d3p1="http://api.wildapricot.org" i:nil="true" />
    <IsBuiltIn>true</IsBuiltIn>
    <IsEditable>false</IsEditable>
    <MemberOnly>false</MemberOnly>
    <RulesAndTermsInfo i:nil="true" />
    <SupportSearch>true</SupportSearch>
    <SystemCode>LastUpdated</SystemCode>
  </ContactFieldDescription>
  <ContactFieldDescription>
    <AllowedValues i:nil="true" xmlns="http://api.wildapricot.org" />
    <FieldName xmlns="http://api.wildapricot.org">Profile last updated
by</FieldName>
    <SystemName i:nil="true" xmlns="http://api.wildapricot.org" />
    <Type xmlns="http://api.wildapricot.org">Number</Type>
    <Description xmlns="http://api.wildapricot.org">Identifier of member, who
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last updated the contact.</Description>
    <FieldInstructions i:nil="true" xmlns="http://api.wildapricot.org" />
    <IsSystem xmlns="http://api.wildapricot.org">true</IsSystem>
    <Order xmlns="http://api.wildapricot.org">0</Order>
    <Access>AdminOnly</Access>
    <ExistsInLevels xmlns:d3p1="http://api.wildapricot.org" i:nil="true" />
    <IsBuiltIn>true</IsBuiltIn>
    <IsEditable>false</IsEditable>
    <MemberOnly>false</MemberOnly>
    <RulesAndTermsInfo i:nil="true" />
    <SupportSearch>false</SupportSearch>
    <SystemCode>LastUpdatedBy</SystemCode>
  </ContactFieldDescription>
  <ContactFieldDescription>
    <AllowedValues i:nil="true" xmlns="http://api.wildapricot.org" />
    <FieldName xmlns="http://api.wildapricot.org">Creation date</FieldName>
    <SystemName i:nil="true" xmlns="http://api.wildapricot.org" />
    <Type xmlns="http://api.wildapricot.org">DateTime</Type>
    <Description xmlns="http://api.wildapricot.org">The date and time the contact
record was created.</Description>
    <FieldInstructions i:nil="true" xmlns="http://api.wildapricot.org" />
    <IsSystem xmlns="http://api.wildapricot.org">true</IsSystem>
    <Order xmlns="http://api.wildapricot.org">0</Order>
    <Access>AdminOnly</Access>
    <ExistsInLevels xmlns:d3p1="http://api.wildapricot.org" i:nil="true" />
    <IsBuiltIn>true</IsBuiltIn>
    <IsEditable>false</IsEditable>
    <MemberOnly>false</MemberOnly>
    <RulesAndTermsInfo i:nil="true" />
    <SupportSearch>true</SupportSearch>
    <SystemCode>CreationDate</SystemCode>
  </ContactFieldDescription>
  <ContactFieldDescription>
    <AllowedValues i:nil="true" xmlns="http://api.wildapricot.org" />
    <FieldName xmlns="http://api.wildapricot.org">Last login date</FieldName>
    <SystemName i:nil="true" xmlns="http://api.wildapricot.org" />
    <Type xmlns="http://api.wildapricot.org">DateTime</Type>
    <Description xmlns="http://api.wildapricot.org">The date and time the contact
last logged in to their account.</Description>
    <FieldInstructions i:nil="true" xmlns="http://api.wildapricot.org" />
    <IsSystem xmlns="http://api.wildapricot.org">true</IsSystem>
    <Order xmlns="http://api.wildapricot.org">0</Order>
    <Access>AdminOnly</Access>
    <ExistsInLevels xmlns:d3p1="http://api.wildapricot.org" i:nil="true" />
    <IsBuiltIn>true</IsBuiltIn>
    <IsEditable>false</IsEditable>
    <MemberOnly>false</MemberOnly>
    <RulesAndTermsInfo i:nil="true" />
    <SupportSearch>true</SupportSearch>
    <SystemCode>LastLoginDate</SystemCode>
  </ContactFieldDescription>
  <ContactFieldDescription>
    <AllowedValues i:nil="true" xmlns="http://api.wildapricot.org" />
    <FieldName xmlns="http://api.wildapricot.org">Terms of use
accepted</FieldName>
    <SystemName i:nil="true" xmlns="http://api.wildapricot.org" />
    <Type xmlns="http://api.wildapricot.org">Boolean</Type>
    <Description xmlns="http://api.wildapricot.org">Terms of use
accepted</Description>
```

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    <FieldInstructions i:nil="true" xmlns="http://api.wildapricot.org" />
    <IsSystem xmlns="http://api.wildapricot.org">true</IsSystem>
    <Order xmlns="http://api.wildapricot.org">0</Order>
    <Access>AdminOnly</Access>
    <ExistsInLevels xmlns:d3p1="http://api.wildapricot.org" i:nil="true" />
    <IsBuiltIn>true</IsBuiltIn>
    <IsEditable>false</IsEditable>
    <MemberOnly>false</MemberOnly>
    <RulesAndTermsInfo>
      <Link>http://www.wildapricot.com/termsofuse.aspx</Link>
      <Text i:nil="true" />
    </RulesAndTermsInfo>
    <SupportSearch>false</SupportSearch>
    <SystemCode>SystemRulesAndTermsAccepted</SystemCode>
  </ContactFieldDescription>
  <ContactFieldDescription>
    <AllowedValues xmlns="http://api.wildapricot.org">
      <ListItem>
        <ExtraCost i:nil="true" />
        <Id>1</Id>
        <Label>Bundle administrator</Label>
        <Position>0</Position>
        <SelectedByDefault>false</SelectedByDefault>
        <Value>1</Value>
      </ListItem>
      <ListItem>
        <ExtraCost i:nil="true" />
        <Id>2</Id>
        <Label>Bundle member</Label>
        <Position>0</Position>
        <SelectedByDefault>false</SelectedByDefault>
        <Value>2</Value>
      </ListItem>
      <ListItem>
        <ExtraCost i:nil="true" />
        <Id>0</Id>
        <Label>Individual</Label>
        <Position>0</Position>
        <SelectedByDefault>false</SelectedByDefault>
        <Value>0</Value>
      </ListItem>
    </AllowedValues>
    <FieldName xmlns="http://api.wildapricot.org">Member role</FieldName>
    <SystemName i:nil="true" xmlns="http://api.wildapricot.org" />
    <Type xmlns="http://api.wildapricot.org">MultipleChoice</Type>
    <Description xmlns="http://api.wildapricot.org">Indicates whether the contact
is an individual member, a bundle member, or a bundle
administrator.</Description>
    <FieldInstructions i:nil="true" xmlns="http://api.wildapricot.org" />
    <IsSystem xmlns="http://api.wildapricot.org">true</IsSystem>
    <Order xmlns="http://api.wildapricot.org">0</Order>
    <Access>AdminOnly</Access>
    <ExistsInLevels xmlns:d3p1="http://api.wildapricot.org">
      <d3p1:LinkedResourceOfint>
        <d3p1:Id>29877</d3p1:Id>

<d3p1:Url>http://api.wildapricot.org/v2/accounts/42353/MembershipLevels/29877</d3
p1:Url>
      </d3p1:LinkedResourceOfint>
```

```
      <d3p1:LinkedResourceOfint>
        <d3p1:Id>29881</d3p1:Id>

<d3p1:Url>http://api.wildapricot.org/v2/accounts/42353/MembershipLevels/29881</d3
p1:Url>
      </d3p1:LinkedResourceOfint>
      <d3p1:LinkedResourceOfint>
        <d3p1:Id>29880</d3p1:Id>

<d3p1:Url>http://api.wildapricot.org/v2/accounts/42353/MembershipLevels/29880</d3
p1:Url>
      </d3p1:LinkedResourceOfint>
      <d3p1:LinkedResourceOfint>
        <d3p1:Id>29879</d3p1:Id>

<d3p1:Url>http://api.wildapricot.org/v2/accounts/42353/MembershipLevels/29879</d3
p1:Url>
      </d3p1:LinkedResourceOfint>
      <d3p1:LinkedResourceOfint>
        <d3p1:Id>29878</d3p1:Id>

<d3p1:Url>http://api.wildapricot.org/v2/accounts/42353/MembershipLevels/29878</d3
p1:Url>
      </d3p1:LinkedResourceOfint>
    </ExistsInLevels>
    <IsBuiltIn>true</IsBuiltIn>
    <IsEditable>false</IsEditable>
    <MemberOnly>true</MemberOnly>
    <RulesAndTermsInfo i:nil="true" />
    <SupportSearch>true</SupportSearch>
    <SystemCode>MemberRole</SystemCode>
  </ContactFieldDescription>
  <ContactFieldDescription>
    <AllowedValues i:nil="true" xmlns="http://api.wildapricot.org" />
    <FieldName xmlns="http://api.wildapricot.org">Member since</FieldName>
    <SystemName i:nil="true" xmlns="http://api.wildapricot.org" />
    <Type xmlns="http://api.wildapricot.org">DateTime</Type>
    <Description xmlns="http://api.wildapricot.org">The date and time that the
contact became a member.</Description>
    <FieldInstructions i:nil="true" xmlns="http://api.wildapricot.org" />
    <IsSystem xmlns="http://api.wildapricot.org">true</IsSystem>
    <Order xmlns="http://api.wildapricot.org">0</Order>
    <Access>AdminOnly</Access>
    <ExistsInLevels xmlns:d3p1="http://api.wildapricot.org">
      <d3p1:LinkedResourceOfint>
        <d3p1:Id>29877</d3p1:Id>

<d3p1:Url>http://api.wildapricot.org/v2/accounts/42353/MembershipLevels/29877</d3
p1:Url>
      </d3p1:LinkedResourceOfint>
      <d3p1:LinkedResourceOfint>
        <d3p1:Id>29881</d3p1:Id>

<d3p1:Url>http://api.wildapricot.org/v2/accounts/42353/MembershipLevels/29881</d3
p1:Url>
      </d3p1:LinkedResourceOfint>
      <d3p1:LinkedResourceOfint>
        <d3p1:Id>29880</d3p1:Id>
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<d3p1:Url>http://api.wildapricot.org/v2/accounts/42353/MembershipLevels/29880</d3
p1:Url>
      </d3p1:LinkedResourceOfint>
      <d3p1:LinkedResourceOfint>
        <d3p1:Id>29879</d3p1:Id>

<d3p1:Url>http://api.wildapricot.org/v2/accounts/42353/MembershipLevels/29879</d3
p1:Url>
      </d3p1:LinkedResourceOfint>
      <d3p1:LinkedResourceOfint>
        <d3p1:Id>29878</d3p1:Id>

<d3p1:Url>http://api.wildapricot.org/v2/accounts/42353/MembershipLevels/29878</d3
p1:Url>
      </d3p1:LinkedResourceOfint>
    </ExistsInLevels>
    <IsBuiltIn>true</IsBuiltIn>
    <IsEditable>true</IsEditable>
    <MemberOnly>true</MemberOnly>
    <RulesAndTermsInfo i:nil="true" />
    <SupportSearch>true</SupportSearch>
    <SystemCode>MemberSince</SystemCode>
  </ContactFieldDescription>
  <ContactFieldDescription>
    <AllowedValues i:nil="true" xmlns="http://api.wildapricot.org" />
    <FieldName xmlns="http://api.wildapricot.org">Renewal due</FieldName>
    <SystemName i:nil="true" xmlns="http://api.wildapricot.org" />
    <Type xmlns="http://api.wildapricot.org">DateTime</Type>
    <Description xmlns="http://api.wildapricot.org">The date and time of the
member's next renewal date.</Description>
    <FieldInstructions i:nil="true" xmlns="http://api.wildapricot.org" />
    <IsSystem xmlns="http://api.wildapricot.org">true</IsSystem>
    <Order xmlns="http://api.wildapricot.org">0</Order>
    <Access>AdminOnly</Access>
    <ExistsInLevels xmlns:d3p1="http://api.wildapricot.org">
      <d3p1:LinkedResourceOfint>
        <d3p1:Id>29877</d3p1:Id>

<d3p1:Url>http://api.wildapricot.org/v2/accounts/42353/MembershipLevels/29877</d3
p1:Url>
      </d3p1:LinkedResourceOfint>
      <d3p1:LinkedResourceOfint>
        <d3p1:Id>29881</d3p1:Id>

<d3p1:Url>http://api.wildapricot.org/v2/accounts/42353/MembershipLevels/29881</d3
p1:Url>
      </d3p1:LinkedResourceOfint>
      <d3p1:LinkedResourceOfint>
        <d3p1:Id>29880</d3p1:Id>

<d3p1:Url>http://api.wildapricot.org/v2/accounts/42353/MembershipLevels/29880</d3
p1:Url>
      </d3p1:LinkedResourceOfint>
      <d3p1:LinkedResourceOfint>
        <d3p1:Id>29879</d3p1:Id>

<d3p1:Url>http://api.wildapricot.org/v2/accounts/42353/MembershipLevels/29879</d3
p1:Url>
      </d3p1:LinkedResourceOfint>
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```
      <d3p1:LinkedResourceOfint>
        <d3p1:Id>29878</d3p1:Id>

<d3p1:Url>http://api.wildapricot.org/v2/accounts/42353/MembershipLevels/29878</d3
p1:Url>
      </d3p1:LinkedResourceOfint>
    </ExistsInLevels>
    <IsBuiltIn>true</IsBuiltIn>
    <IsEditable>true</IsEditable>
    <MemberOnly>true</MemberOnly>
    <RulesAndTermsInfo i:nil="true" />
    <SupportSearch>true</SupportSearch>
    <SystemCode>RenewalDue</SystemCode>
  </ContactFieldDescription>
  <ContactFieldDescription>
    <AllowedValues i:nil="true" xmlns="http://api.wildapricot.org" />
    <FieldName xmlns="http://api.wildapricot.org">Membership level ID</FieldName>
    <SystemName i:nil="true" xmlns="http://api.wildapricot.org" />
    <Type xmlns="http://api.wildapricot.org">Number</Type>
    <Description xmlns="http://api.wildapricot.org">The identifier of the
membership level assigned to the contact (if any).</Description>
    <FieldInstructions i:nil="true" xmlns="http://api.wildapricot.org" />
    <IsSystem xmlns="http://api.wildapricot.org">true</IsSystem>
    <Order xmlns="http://api.wildapricot.org">0</Order>
    <Access>AdminOnly</Access>
    <ExistsInLevels xmlns:d3p1="http://api.wildapricot.org">
      <d3p1:LinkedResourceOfint>
        <d3p1:Id>29877</d3p1:Id>

<d3p1:Url>http://api.wildapricot.org/v2/accounts/42353/MembershipLevels/29877</d3
p1:Url>
      </d3p1:LinkedResourceOfint>
      <d3p1:LinkedResourceOfint>
        <d3p1:Id>29881</d3p1:Id>

<d3p1:Url>http://api.wildapricot.org/v2/accounts/42353/MembershipLevels/29881</d3
p1:Url>
      </d3p1:LinkedResourceOfint>
      <d3p1:LinkedResourceOfint>
        <d3p1:Id>29880</d3p1:Id>

<d3p1:Url>http://api.wildapricot.org/v2/accounts/42353/MembershipLevels/29880</d3
p1:Url>
      </d3p1:LinkedResourceOfint>
      <d3p1:LinkedResourceOfint>
        <d3p1:Id>29879</d3p1:Id>

<d3p1:Url>http://api.wildapricot.org/v2/accounts/42353/MembershipLevels/29879</d3
p1:Url>
      </d3p1:LinkedResourceOfint>
      <d3p1:LinkedResourceOfint>
        <d3p1:Id>29878</d3p1:Id>

<d3p1:Url>http://api.wildapricot.org/v2/accounts/42353/MembershipLevels/29878</d3
p1:Url>
      </d3p1:LinkedResourceOfint>
    </ExistsInLevels>
    <IsBuiltIn>true</IsBuiltIn>
    <IsEditable>false</IsEditable>
```

```
    &lt;MemberOnly&gt;true&lt;/MemberOnly&gt;
    &lt;RulesAndTermsInfo i:nil="true" /&gt;
    &lt;SupportSearch&gt;true&lt;/SupportSearch&gt;
    &lt;SystemCode&gt;MembershipLevelId&lt;/SystemCode&gt;
  &lt;/ContactFieldDescription&gt;
  &lt;ContactFieldDescription&gt;
    &lt;AllowedValues i:nil="true" xmlns="http://api.wildapricot.org" /&gt;
    &lt;FieldName xmlns="http://api.wildapricot.org"&gt;Access to profile by
others&lt;/FieldName&gt;
    &lt;SystemName i:nil="true" xmlns="http://api.wildapricot.org" /&gt;
    &lt;Type xmlns="http://api.wildapricot.org"&gt;Boolean&lt;/Type&gt;
    &lt;Description xmlns="http://api.wildapricot.org"&gt;Indicates whether the Show
profile option is enabled in this member's privacy settings.&lt;/Description&gt;
    &lt;FieldInstructions i:nil="true" xmlns="http://api.wildapricot.org" /&gt;
    &lt;IsSystem xmlns="http://api.wildapricot.org"&gt;true&lt;/IsSystem&gt;
    &lt;Order xmlns="http://api.wildapricot.org"&gt;0&lt;/Order&gt;
    &lt;Access&gt;AdminOnly&lt;/Access&gt;
    &lt;ExistsInLevels xmlns:d3p1="http://api.wildapricot.org"&gt;
      &lt;d3p1:LinkedResourceOfint&gt;
        &lt;d3p1:Id&gt;29877&lt;/d3p1:Id&gt;

&lt;d3p1:Url&gt;http://api.wildapricot.org/v2/accounts/42353/MembershipLevels/29877</d3
p1:Url>
      &lt;/d3p1:LinkedResourceOfint&gt;
      &lt;d3p1:LinkedResourceOfint&gt;
        &lt;d3p1:Id&gt;29881&lt;/d3p1:Id&gt;

&lt;d3p1:Url&gt;http://api.wildapricot.org/v2/accounts/42353/MembershipLevels/29881</d3
p1:Url>
      &lt;/d3p1:LinkedResourceOfint&gt;
      &lt;d3p1:LinkedResourceOfint&gt;
        &lt;d3p1:Id&gt;29880&lt;/d3p1:Id&gt;

&lt;d3p1:Url&gt;http://api.wildapricot.org/v2/accounts/42353/MembershipLevels/29880</d3
p1:Url>
      &lt;/d3p1:LinkedResourceOfint&gt;
      &lt;d3p1:LinkedResourceOfint&gt;
        &lt;d3p1:Id&gt;29879&lt;/d3p1:Id&gt;

&lt;d3p1:Url&gt;http://api.wildapricot.org/v2/accounts/42353/MembershipLevels/29879</d3
p1:Url>
      &lt;/d3p1:LinkedResourceOfint&gt;
      &lt;d3p1:LinkedResourceOfint&gt;
        &lt;d3p1:Id&gt;29878&lt;/d3p1:Id&gt;

&lt;d3p1:Url&gt;http://api.wildapricot.org/v2/accounts/42353/MembershipLevels/29878</d3
p1:Url>
      &lt;/d3p1:LinkedResourceOfint&gt;
    &lt;/ExistsInLevels&gt;
    &lt;IsBuiltIn&gt;true&lt;/IsBuiltIn&gt;
    &lt;IsEditable&gt;true&lt;/IsEditable&gt;
    &lt;MemberOnly&gt;true&lt;/MemberOnly&gt;
    &lt;RulesAndTermsInfo i:nil="true" /&gt;
    &lt;SupportSearch&gt;true&lt;/SupportSearch&gt;
    &lt;SystemCode&gt;AccessToProfileByOthers&lt;/SystemCode&gt;
  &lt;/ContactFieldDescription&gt;
  &lt;ContactFieldDescription&gt;
    &lt;AllowedValues i:nil="true" xmlns="http://api.wildapricot.org" /&gt;
    &lt;FieldName xmlns="http://api.wildapricot.org"&gt;Renewal date last
```

```
changed</FieldName>
    <SystemName i:nil="true" xmlns="http://api.wildapricot.org" />
    <Type xmlns="http://api.wildapricot.org">DateTime</Type>
    <Description xmlns="http://api.wildapricot.org">The date and time the
member's renewal date was last changed.</Description>
    <FieldInstructions i:nil="true" xmlns="http://api.wildapricot.org" />
    <IsSystem xmlns="http://api.wildapricot.org">true</IsSystem>
    <Order xmlns="http://api.wildapricot.org">0</Order>
    <Access>AdminOnly</Access>
    <ExistsInLevels xmlns:d3p1="http://api.wildapricot.org">
      <d3p1:LinkedResourceOfint>
        <d3p1:Id>29877</d3p1:Id>

<d3p1:Url>http://api.wildapricot.org/v2/accounts/42353/MembershipLevels/29877</d3
p1:Url>
      </d3p1:LinkedResourceOfint>
      <d3p1:LinkedResourceOfint>
        <d3p1:Id>29881</d3p1:Id>

<d3p1:Url>http://api.wildapricot.org/v2/accounts/42353/MembershipLevels/29881</d3
p1:Url>
      </d3p1:LinkedResourceOfint>
      <d3p1:LinkedResourceOfint>
        <d3p1:Id>29880</d3p1:Id>

<d3p1:Url>http://api.wildapricot.org/v2/accounts/42353/MembershipLevels/29880</d3
p1:Url>
      </d3p1:LinkedResourceOfint>
      <d3p1:LinkedResourceOfint>
        <d3p1:Id>29879</d3p1:Id>

<d3p1:Url>http://api.wildapricot.org/v2/accounts/42353/MembershipLevels/29879</d3
p1:Url>
      </d3p1:LinkedResourceOfint>
      <d3p1:LinkedResourceOfint>
        <d3p1:Id>29878</d3p1:Id>

<d3p1:Url>http://api.wildapricot.org/v2/accounts/42353/MembershipLevels/29878</d3
p1:Url>
      </d3p1:LinkedResourceOfint>
    </ExistsInLevels>
    <IsBuiltIn>true</IsBuiltIn>
    <IsEditable>false</IsEditable>
    <MemberOnly>true</MemberOnly>
    <RulesAndTermsInfo i:nil="true" />
    <SupportSearch>true</SupportSearch>
    <SystemCode>RenewalDateLastChanged</SystemCode>
  </ContactFieldDescription>
  <ContactFieldDescription>
    <AllowedValues i:nil="true" xmlns="http://api.wildapricot.org" />
    <FieldName xmlns="http://api.wildapricot.org">Level last changed</FieldName>
    <SystemName i:nil="true" xmlns="http://api.wildapricot.org" />
    <Type xmlns="http://api.wildapricot.org">DateTime</Type>
    <Description xmlns="http://api.wildapricot.org">The date and time the
contact's membership level was last changed</Description>
    <FieldInstructions i:nil="true" xmlns="http://api.wildapricot.org" />
    <IsSystem xmlns="http://api.wildapricot.org">true</IsSystem>
    <Order xmlns="http://api.wildapricot.org">0</Order>
    <Access>AdminOnly</Access>
```

```
    <ExistsInLevels xmlns:d3p1="http://api.wildapricot.org">
      <d3p1:LinkedResourceOfint>
        <d3p1:Id>29877</d3p1:Id>

<d3p1:Url>http://api.wildapricot.org/v2/accounts/42353/MembershipLevels/29877</d3
p1:Url>
      </d3p1:LinkedResourceOfint>
      <d3p1:LinkedResourceOfint>
        <d3p1:Id>29881</d3p1:Id>

<d3p1:Url>http://api.wildapricot.org/v2/accounts/42353/MembershipLevels/29881</d3
p1:Url>
      </d3p1:LinkedResourceOfint>
      <d3p1:LinkedResourceOfint>
        <d3p1:Id>29880</d3p1:Id>

<d3p1:Url>http://api.wildapricot.org/v2/accounts/42353/MembershipLevels/29880</d3
p1:Url>
      </d3p1:LinkedResourceOfint>
      <d3p1:LinkedResourceOfint>
        <d3p1:Id>29879</d3p1:Id>

<d3p1:Url>http://api.wildapricot.org/v2/accounts/42353/MembershipLevels/29879</d3
p1:Url>
      </d3p1:LinkedResourceOfint>
      <d3p1:LinkedResourceOfint>
        <d3p1:Id>29878</d3p1:Id>

<d3p1:Url>http://api.wildapricot.org/v2/accounts/42353/MembershipLevels/29878</d3
p1:Url>
      </d3p1:LinkedResourceOfint>
    </ExistsInLevels>
    <IsBuiltIn>true</IsBuiltIn>
    <IsEditable>false</IsEditable>
    <MemberOnly>true</MemberOnly>
    <RulesAndTermsInfo i:nil="true" />
    <SupportSearch>true</SupportSearch>
    <SystemCode>LevelLastChanged</SystemCode>
  </ContactFieldDescription>
  <ContactFieldDescription>
    <AllowedValues i:nil="true" xmlns="http://api.wildapricot.org" />
    <FieldName xmlns="http://api.wildapricot.org">Bundle ID</FieldName>
    <SystemName i:nil="true" xmlns="http://api.wildapricot.org" />
    <Type xmlns="http://api.wildapricot.org">Number</Type>
    <Description xmlns="http://api.wildapricot.org">Bundle ID which member
belongs to</Description>
    <FieldInstructions i:nil="true" xmlns="http://api.wildapricot.org" />
    <IsSystem xmlns="http://api.wildapricot.org">true</IsSystem>
    <Order xmlns="http://api.wildapricot.org">0</Order>
    <Access>AdminOnly</Access>
    <ExistsInLevels xmlns:d3p1="http://api.wildapricot.org">
      <d3p1:LinkedResourceOfint>
        <d3p1:Id>29877</d3p1:Id>

<d3p1:Url>http://api.wildapricot.org/v2/accounts/42353/MembershipLevels/29877</d3
p1:Url>
      </d3p1:LinkedResourceOfint>
      <d3p1:LinkedResourceOfint>
        <d3p1:Id>29881</d3p1:Id>
```

```
<d3p1:Url>http://api.wildapricot.org/v2/accounts/42353/MembershipLevels/29881</d3
p1:Url>
      </d3p1:LinkedResourceOfint>
      <d3p1:LinkedResourceOfint>
        <d3p1:Id>29880</d3p1:Id>

<d3p1:Url>http://api.wildapricot.org/v2/accounts/42353/MembershipLevels/29880</d3
p1:Url>
      </d3p1:LinkedResourceOfint>
      <d3p1:LinkedResourceOfint>
        <d3p1:Id>29879</d3p1:Id>

<d3p1:Url>http://api.wildapricot.org/v2/accounts/42353/MembershipLevels/29879</d3
p1:Url>
      </d3p1:LinkedResourceOfint>
      <d3p1:LinkedResourceOfint>
        <d3p1:Id>29878</d3p1:Id>

<d3p1:Url>http://api.wildapricot.org/v2/accounts/42353/MembershipLevels/29878</d3
p1:Url>
      </d3p1:LinkedResourceOfint>
    </ExistsInLevels>
    <IsBuiltIn>true</IsBuiltIn>
    <IsEditable>false</IsEditable>
    <MemberOnly>true</MemberOnly>
    <RulesAndTermsInfo i:nil="true" />
    <SupportSearch>false</SupportSearch>
    <SystemCode>BundleId</SystemCode>
  </ContactFieldDescription>
  <ContactFieldDescription>
    <AllowedValues xmlns="http://api.wildapricot.org">
      <ListItem>
        <ExtraCost i:nil="true" />
        <Id>1</Id>
        <Label>Active</Label>
        <Position>0</Position>
        <SelectedByDefault>false</SelectedByDefault>
        <Value>Active</Value>
      </ListItem>
      <ListItem>
        <ExtraCost i:nil="true" />
        <Id>2</Id>
        <Label>Lapsed</Label>
        <Position>0</Position>
        <SelectedByDefault>false</SelectedByDefault>
        <Value>Lapsed</Value>
      </ListItem>
      <ListItem>
        <ExtraCost i:nil="true" />
        <Id>20</Id>
        <Label>PendingNew</Label>
        <Position>0</Position>
        <SelectedByDefault>false</SelectedByDefault>
        <Value>PendingNew</Value>
      </ListItem>
      <ListItem>
        <ExtraCost i:nil="true" />
        <Id>3</Id>
```

```
        <Label>PendingRenewal</Label>
        <Position>0</Position>
        <SelectedByDefault>false</SelectedByDefault>
        <Value>PendingRenewal</Value>
      </ListItem>
      <ListItem>
        <ExtraCost i:nil="true" />
        <Id>30</Id>
        <Label>PendingUpgrade</Label>
        <Position>0</Position>
        <SelectedByDefault>false</SelectedByDefault>
        <Value>PendingUpgrade</Value>
      </ListItem>
    </AllowedValues>
    <FieldName xmlns="http://api.wildapricot.org">Membership status</FieldName>
    <SystemName i:nil="true" xmlns="http://api.wildapricot.org" />
    <Type xmlns="http://api.wildapricot.org">Choice</Type>
    <Description xmlns="http://api.wildapricot.org">The status of the contact's
membership.</Description>
    <FieldInstructions i:nil="true" xmlns="http://api.wildapricot.org" />
    <IsSystem xmlns="http://api.wildapricot.org">true</IsSystem>
    <Order xmlns="http://api.wildapricot.org">0</Order>
    <Access>AdminOnly</Access>
    <ExistsInLevels xmlns:d3p1="http://api.wildapricot.org">
      <d3p1:LinkedResourceOfint>
        <d3p1:Id>29877</d3p1:Id>

<d3p1:Url>http://api.wildapricot.org/v2/accounts/42353/MembershipLevels/29877</d3
p1:Url>
      </d3p1:LinkedResourceOfint>
      <d3p1:LinkedResourceOfint>
        <d3p1:Id>29881</d3p1:Id>

<d3p1:Url>http://api.wildapricot.org/v2/accounts/42353/MembershipLevels/29881</d3
p1:Url>
      </d3p1:LinkedResourceOfint>
      <d3p1:LinkedResourceOfint>
        <d3p1:Id>29880</d3p1:Id>

<d3p1:Url>http://api.wildapricot.org/v2/accounts/42353/MembershipLevels/29880</d3
p1:Url>
      </d3p1:LinkedResourceOfint>
      <d3p1:LinkedResourceOfint>
        <d3p1:Id>29879</d3p1:Id>

<d3p1:Url>http://api.wildapricot.org/v2/accounts/42353/MembershipLevels/29879</d3
p1:Url>
      </d3p1:LinkedResourceOfint>
      <d3p1:LinkedResourceOfint>
        <d3p1:Id>29878</d3p1:Id>

<d3p1:Url>http://api.wildapricot.org/v2/accounts/42353/MembershipLevels/29878</d3
p1:Url>
      </d3p1:LinkedResourceOfint>
    </ExistsInLevels>
    <IsBuiltIn>true</IsBuiltIn>
    <IsEditable>true</IsEditable>
    <MemberOnly>true</MemberOnly>
    <RulesAndTermsInfo i:nil="true" />
```

```
    <SupportSearch>true</SupportSearch>
    <SystemCode>Status</SystemCode>
  </ContactFieldDescription>
  <ContactFieldDescription>
    <AllowedValues i:nil="true" xmlns="http://api.wildapricot.org" />
    <FieldName xmlns="http://api.wildapricot.org">Member ID</FieldName>
    <SystemName i:nil="true" xmlns="http://api.wildapricot.org" />
    <Type xmlns="http://api.wildapricot.org">Number</Type>
    <Description xmlns="http://api.wildapricot.org">This is a read-only system
field used to uniquely identify the member or contact.</Description>
    <FieldInstructions xmlns="http://api.wildapricot.org">
    </FieldInstructions>
    <IsSystem xmlns="http://api.wildapricot.org">true</IsSystem>
    <Order xmlns="http://api.wildapricot.org">0</Order>
    <Access>AdminOnly</Access>
    <ExistsInLevels xmlns:d3p1="http://api.wildapricot.org" i:nil="true" />
    <IsBuiltIn>false</IsBuiltIn>
    <IsEditable>false</IsEditable>
    <MemberOnly>false</MemberOnly>
    <RulesAndTermsInfo i:nil="true" />
    <SupportSearch>true</SupportSearch>
    <SystemCode>MemberId</SystemCode>
  </ContactFieldDescription>
  <ContactFieldDescription>
    <AllowedValues i:nil="true" xmlns="http://api.wildapricot.org" />
    <FieldName xmlns="http://api.wildapricot.org">First name</FieldName>
    <SystemName i:nil="true" xmlns="http://api.wildapricot.org" />
    <Type xmlns="http://api.wildapricot.org">String</Type>
    <Description xmlns="http://api.wildapricot.org">This is a system field (first
name).   It cannot be deleted.</Description>
    <FieldInstructions xmlns="http://api.wildapricot.org">
    </FieldInstructions>
    <IsSystem xmlns="http://api.wildapricot.org">true</IsSystem>
    <Order xmlns="http://api.wildapricot.org">1</Order>
    <Access>Public</Access>
    <ExistsInLevels xmlns:d3p1="http://api.wildapricot.org" i:nil="true" />
    <IsBuiltIn>false</IsBuiltIn>
    <IsEditable>true</IsEditable>
    <MemberOnly>false</MemberOnly>
    <RulesAndTermsInfo i:nil="true" />
    <SupportSearch>true</SupportSearch>
    <SystemCode>FirstName</SystemCode>
  </ContactFieldDescription>
  <ContactFieldDescription>
    <AllowedValues i:nil="true" xmlns="http://api.wildapricot.org" />
    <FieldName xmlns="http://api.wildapricot.org">Last name</FieldName>
    <SystemName i:nil="true" xmlns="http://api.wildapricot.org" />
    <Type xmlns="http://api.wildapricot.org">String</Type>
    <Description xmlns="http://api.wildapricot.org">This is a system field (last
name).  It cannot be deleted.</Description>
    <FieldInstructions xmlns="http://api.wildapricot.org">
    </FieldInstructions>
    <IsSystem xmlns="http://api.wildapricot.org">true</IsSystem>
    <Order xmlns="http://api.wildapricot.org">2</Order>
    <Access>Public</Access>
    <ExistsInLevels xmlns:d3p1="http://api.wildapricot.org" i:nil="true" />
    <IsBuiltIn>false</IsBuiltIn>
    <IsEditable>true</IsEditable>
    <MemberOnly>false</MemberOnly>
```

```
    &lt;RulesAndTermsInfo i:nil="true" /&gt;
    &lt;SupportSearch&gt;true&lt;/SupportSearch&gt;
    &lt;SystemCode&gt;LastName&lt;/SystemCode&gt;
  &lt;/ContactFieldDescription&gt;
  &lt;ContactFieldDescription&gt;
    &lt;AllowedValues i:nil="true" xmlns="http://api.wildapricot.org" /&gt;
    &lt;FieldName xmlns="http://api.wildapricot.org"&gt;Organization&lt;/FieldName&gt;
    &lt;SystemName i:nil="true" xmlns="http://api.wildapricot.org" /&gt;
    &lt;Type xmlns="http://api.wildapricot.org"&gt;String&lt;/Type&gt;
    &lt;Description xmlns="http://api.wildapricot.org"&gt;This is a system field
(organization).  It cannot be deleted.&lt;/Description&gt;
    &lt;FieldInstructions xmlns="http://api.wildapricot.org"&gt;
    &lt;/FieldInstructions&gt;
    &lt;IsSystem xmlns="http://api.wildapricot.org"&gt;true&lt;/IsSystem&gt;
    &lt;Order xmlns="http://api.wildapricot.org"&gt;3&lt;/Order&gt;
    &lt;Access&gt;Public&lt;/Access&gt;
    &lt;ExistsInLevels xmlns:d3p1="http://api.wildapricot.org" i:nil="true" /&gt;
    &lt;IsBuiltIn&gt;false&lt;/IsBuiltIn&gt;
    &lt;IsEditable&gt;true&lt;/IsEditable&gt;
    &lt;MemberOnly&gt;false&lt;/MemberOnly&gt;
    &lt;RulesAndTermsInfo i:nil="true" /&gt;
    &lt;SupportSearch&gt;true&lt;/SupportSearch&gt;
    &lt;SystemCode&gt;Organization&lt;/SystemCode&gt;
  &lt;/ContactFieldDescription&gt;
  &lt;ContactFieldDescription&gt;
    &lt;AllowedValues i:nil="true" xmlns="http://api.wildapricot.org" /&gt;
    &lt;FieldName xmlns="http://api.wildapricot.org"&gt;e-Mail&lt;/FieldName&gt;
    &lt;SystemName i:nil="true" xmlns="http://api.wildapricot.org" /&gt;
    &lt;Type xmlns="http://api.wildapricot.org"&gt;String&lt;/Type&gt;
    &lt;Description xmlns="http://api.wildapricot.org"&gt;This is a system field
(email).   It is mandatory for online self-service transactions and cannot be
deleted.&lt;/Description&gt;
    &lt;FieldInstructions xmlns="http://api.wildapricot.org"&gt;
    &lt;/FieldInstructions&gt;
    &lt;IsSystem xmlns="http://api.wildapricot.org"&gt;true&lt;/IsSystem&gt;
    &lt;Order xmlns="http://api.wildapricot.org"&gt;4&lt;/Order&gt;
    &lt;Access&gt;Public&lt;/Access&gt;
    &lt;ExistsInLevels xmlns:d3p1="http://api.wildapricot.org" i:nil="true" /&gt;
    &lt;IsBuiltIn&gt;false&lt;/IsBuiltIn&gt;
    &lt;IsEditable&gt;true&lt;/IsEditable&gt;
    &lt;MemberOnly&gt;false&lt;/MemberOnly&gt;
    &lt;RulesAndTermsInfo i:nil="true" /&gt;
    &lt;SupportSearch&gt;true&lt;/SupportSearch&gt;
    &lt;SystemCode&gt;Email&lt;/SystemCode&gt;
  &lt;/ContactFieldDescription&gt;
  &lt;ContactFieldDescription&gt;
    &lt;AllowedValues i:nil="true" xmlns="http://api.wildapricot.org" /&gt;
    &lt;FieldName xmlns="http://api.wildapricot.org"&gt;Phone&lt;/FieldName&gt;
    &lt;SystemName i:nil="true" xmlns="http://api.wildapricot.org" /&gt;
    &lt;Type xmlns="http://api.wildapricot.org"&gt;String&lt;/Type&gt;
    &lt;Description xmlns="http://api.wildapricot.org"&gt;This is a system field
(phone).  It cannot be deleted.&lt;/Description&gt;
    &lt;FieldInstructions xmlns="http://api.wildapricot.org"&gt;
    &lt;/FieldInstructions&gt;
    &lt;IsSystem xmlns="http://api.wildapricot.org"&gt;true&lt;/IsSystem&gt;
    &lt;Order xmlns="http://api.wildapricot.org"&gt;5&lt;/Order&gt;
    &lt;Access&gt;Public&lt;/Access&gt;
    &lt;ExistsInLevels xmlns:d3p1="http://api.wildapricot.org" i:nil="true" /&gt;
    &lt;IsBuiltIn&gt;false&lt;/IsBuiltIn&gt;
```

```
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```

```
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```

```
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```

```
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    </FieldInstructions>
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```

```
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    &lt;SupportSearch&gt;true&lt;/SupportSearch&gt;
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  &lt;ContactFieldDescription&gt;
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```

```
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    &lt;/FieldInstructions&gt;
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    &lt;/FieldInstructions&gt;
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```

```
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<IsEditable>true</IsEditable>
<MemberOnly>true</MemberOnly>
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<SupportSearch>true</SupportSearch>
<SystemCode i:nil="true" />
```

```
  </ContactFieldDescription>
</ArrayOfContactFieldDescription>
```

On this page:

- Syntax
- Example
- Parameters
- Response fields
- Sample JSON response
- Sample XML response

See also:

- API V2 authentication
- API V2 calls
- Contacts API V2 call

Contacts API V2 call

Contacts API V2 call

Wild Apricot's API is intended for use by developers with technical expertise. If you need assistance, we provide support via email o r through our Developers forum.

Using the Contacts API, you retrieve or update contact information, and add contacts to your database. You can retrieve a detailed list of contacts, a list of contact IDs, or details about a particular contact. You can retrieve the contact list synchronously or asynchronously.

Responses can be filtered so that only those records that match the filter criteria will be retrieved. Filtering your search results can significantly reduce server response time. You can also control which fields are included in the results. For more information, see Selecting response fields (below). As well, you can retrieve contact records in sets or pages. For more information, see Paging (below).

Archived contacts are included in your search results unless you explicitly filter them out using the *$filter=Archived eq false* filter. For more information, see Filtering the results.

Retrieving the number of contacts

You can use a Contacts API call to retrieve the number of contact records in your Wild Apricot database.

Syntax

```
GET {baseAPIaddress}/{version}/Accounts/{accountID}/Contacts?$count
```

Each API call must include an authentication information that verifies your account and prevents others from accessing your data. For more information, see Authenticating API access from a 3rd-party server or application or Authenticating API access from a Wild Apricot site page.

Example

```
GET https://api.wildapricot.org/v2/Accounts/58293/Contacts?$count
```

The call is executed synchronously. The number of contacts will be returned in a **Count** field.

Sample response

```
{
  "Count": 1092
}
```

Retrieving information for a specific contact

Syntax

```
GET {baseAPIaddress}/{version}/Accounts/{accountID}/Contacts/{contactID}
```

Example

```
GET https://api.wildapricot.org/v2/Accounts/58293/Contacts/402784
```

Retrieving information for the current contact

Syntax

```
GET {baseAPIaddress}/{version}/Accounts/{accountID}/Contacts/me
```

Example

```
GET https://api.wildapricot.org/v2/Accounts/58293/Contacts/me
```

Retrieving information for all contacts

You can retrieve information for all contacts either synchronously or asynchronously. If you perform the call synchronously, then the results are immediately displayed. If you perform the call asynchronously, then retrieving the information is a two-stage process. First, you submit the search request as a Contacts API call and receive a result ID, as shown in the sample JSON code below.

```
{
    "ResultId": "ecbe4c97-f0bd-4dfb-a251-a9eeb196e637",
    "ResultUrl":
"https://api.wildapricot.org/v1/accounts/58293/Contacts/?resultId=ecbe4c97f0bd4dfba2
51a9eeb196e637",
    "Requested": "2013-07-02T18:32:42.6450398+04:00",
    "State": "Waiting",
    "InitialQuery": {
        "ObjectType": "Contact",
        "FilterExpression": null,
        "SelectExpression": null
    }
}
```

Then, you pass the result ID as a parameter in a second Contacts API call. In response to the second API call, the server will return the search results.

Retrieving a complete list of your contacts can be an intensive process, so only one Contacts API call can be processed at a time. If multiple requests are received from the same account, they will be processed in the order in which they were received.

Synchronous search request

Syntax

```
GET {baseAPIaddress}/{version}/Accounts/{accountID}/Contacts?$async=false
```

Example

```
GET https://api.wildapricot.org/v2/Accounts/58293/Contacts?$async=false
```

Asynchronous search request

Syntax

```
GET {baseAPIaddress}/{version}/Accounts/{accountID}/Contacts
```

Example

```
GET https://api.wildapricot.org/v2/Accounts/58293/Contacts
```

Asynchronous results request

Syntax

```
GET {baseAPIaddress}/{version}/Accounts/{accountID}/Contacts?resultId={resultID}
```

Example

```
GET
https://api.wildapricot.org/v2/Accounts/58293/Contacts?resultId=ecbe4c97f0bd4dfba251
a9eeb196e637
```

Parameters

The following parameters are used within the Contacts API call:

Variable	Description
{baseAPIaddress}	The base address of the API. For more information, see API access options .
{version}	The version number of the API. Versions 2 and 2.1 are supported for this call. If you want to retrieve picture fields along with other information, you must specify v2.1 as the API version. To retrieve a list of API versions, use the base API call.
{accountID}	The account identifier that appears on the Account and billing screen and is returned by the Accounts API call.

{contactID}	The unique identifier for a contact. The contact ID is displayed in Wild Apricot on the contact record. You can retrieve a list of contact IDs by calling the Contacts API without specify a contactID.
{resultID}	The result identifier returned by the first Contacts API call. The identifier is passed as a parameter – with or without dashes – during the second Contacts API call.

Each API call must include an authentication token that authenticates your account and prevents others from accessing your data. For more information, see API V2 authentication.

The following parameters are optional:

Variable	Description	For more information, see...
$async	Controls whether the API call is perform asynchronously.	Retrieving information for all contacts
$filter	Filters the results of the Contacts API call so that only those records that match the filter criteria are included.	Filtering the results
$select	Controls which fields are returned in the Contacts API call.	Selecting response fields

Response fields

Search request

In the first and second stages of an asynchronous contact search, the Contacts API returns the following information regarding the search request.

Field	Description
ResultId	The search request identifier. The identifier is passed as a parameter during the second Contacts API call.
ResultUrl	The address of the API call for the second Contacts API call – the results request.
Requested	The date and time the search request was submitted.
Processed	The date and time the search request was processed.
State	The state of the search request. Possible values are: • *Waiting* – the first stage in the process is complete, and the second stage has not yet been initiated. • *Processing* – the results request (from the second Contacts API call) has been submitted but the results have not yet been returned. • *Complete* – the search results have been successfully retrieved. • *Failed* – the search request has failed.
InitialQuery	The details of any $filter or $select parameters passed as part of the search request. The $filter parameter is used to filter the search results so that only those records that match the filter criteria will be returned. The $select parameter is used to control which fields are included in the results.

Search results

In the second stage of an asynchronous contact search – and in the first and only stage of a synchronous contact search – the Contacts API returns the following information for each contact.

Field	Description
Id	The ID of the contact as displayed on their contact record.
Url	The address of the API call for this contact.
FirstName	The contact's first name.
LastName	The contact's last name.
Email	The contact's email address.
DisplayName	The full name of the contact.
Organization	The organization to which the contact belongs.
ProfileLastUpdated	The date and time that common fields, membership fields, or member group participation were last updated for the contact.
MembershipLevel	The name and URL of the membership level assigned to the contact. If the contact is not a member, then the MembershipLevel field is not included in the results.
MembershipEnabled	Indicates whether the contact is a member. A value of false indicates that the contact is a not a member or is a suspended member.
Status	The status of the contact's membership. Possible values are *Active*, *Lapsed*, *PendingNew*, *PendingRenewal*, and *PendingUpgrade*. The status is only included in the results if the contact is a member.
FieldValues	For each custom field you have added to your Wild Apricot database, the name of the field, its system code, and its value for this contact are returned. The system code is a unique field identifier that can be used instead of the field name to identify the field. As well, a number of system fields are returned. If a custom field is restricted to certain access levels, then CustomAccessLevel indicates the level to which the field is restricted. Possible values are *AdminOnly*, *Member*, and *Public*.

Sample JSON response

Click here to expand/collapse


```
{
  "FirstName": "Steve",
  "LastName": "Andrews",
  "Email": "steve@wildapricot.com",
  "DisplayName": "Steve Andrews",
  "ProfileLastUpdated": "2014-06-12T15:09:16-04:00",
  "MembershipLevel": {
    "Id": 29879,
    "Url": "http://api.wildapricot.org/v2/accounts/42353/MembershipLevels/29879",
    "Name": "Platinum"
  },
  "MembershipEnabled": true,
  "Status": "Active",
  "FieldValues": [
    {
      "FieldName": "Archived",
```

```
        "Value": false
      },
      {
        "FieldName": "Donor",
        "Value": false
      },
      {
        "FieldName": "Event registrant",
        "Value": false
      },
      {
        "FieldName": "Member",
        "Value": true
      },
      {
        "FieldName": "Suspended member",
        "Value": false
      },
      {
        "FieldName": "Notes",
        "Value": "Notes updated during import on 27 May 2014.
Renewal processed on 30 May 2014 from 24 Apr 2014 until 24 Apr 2014."
      },
      {
        "FieldName": "Event announcements",
        "Value": true
      },
      {
        "FieldName": "Member emails and newsletters",
        "Value": true
      },
      {
        "FieldName": "Email delivery disabled",
        "Value": false
      },
      {
        "FieldName": "Receiving emails disabled",
        "Value": false
      },
      {
        "FieldName": "Balance",
        "Value": 0
      },
      {
        "FieldName": "Total donated",
        "Value": 0
      },
      {
        "FieldName": "Registered for specific event",
        "Value": null
      },
      {
        "FieldName": "Profile last updated",
        "Value": "2014-06-12T15:09:16-04:00"
      },
      {
        "FieldName": "Profile last updated by",
        "Value": 725060
      },
```

```
    {
      "FieldName": "Creation date",
      "Value": "2014-05-27T09:50:49-04:00"
    },
    {
      "FieldName": "Last login date",
      "Value": "2014-07-14T09:26:54-04:00"
    },
    {
      "FieldName": "Terms of use accepted",
      "Value": true
    },
    {
      "FieldName": "Member ID",
      "Value": 725060
    },
    {
      "FieldName": "First name",
      "Value": "Steve"
    },
    {
      "FieldName": "Last name",
      "Value": "Andrews"
    },
    {
      "FieldName": "Organization",
      "Value": "Keep It Wild"
    },
    {
      "FieldName": "e-Mail",
      "Value": "steve@wildapricot.com"
    },
    {
      "FieldName": "Phone",
      "Value": ""
    },
    {
      "FieldName": "State/Province",
      "Value": {
        "Id": 137435,
        "Label": "California"
      }
    },
    {
      "FieldName": "Member only",
      "Value": null
    },
    {
      "FieldName": "Member role",
      "Value": "Individual"
    },
    {
      "FieldName": "Member since",
      "Value": "2013-07-10T20:00:00-04:00"
    },
    {
      "FieldName": "Renewal due",
      "Value": "2014-04-23T20:00:00-04:00"
    },
```

```
{
  "FieldName": "Membership level ID",
  "Value": 29879
},
{
  "FieldName": "Access to profile by others",
  "Value": false
},
{
  "FieldName": "Renewal date last changed",
  "Value": null
},
{
  "FieldName": "Level last changed",
  "Value": null
},
{
  "FieldName": "Bundle ID",
  "Value": null
},
{
  "FieldName": "Membership status",
  "Value": "Active"
},
{
  "FieldName": "Job title",
  "Value": "Graphic designer"
},
{
  "FieldName": "Website",
  "Value": null
},
{
  "FieldName": "Address",
  "Value": null
},
{
  "FieldName": "City",
  "Value": "San Diego"
},
{
  "FieldName": "Postal code",
  "Value": null
},
{
  "FieldName": "Province/State",
  "Value": null
},
{
  "FieldName": "Country",
  "Value": "United States"
},
{
  "FieldName": "Groups",
  "Value": [
    {
      "Id": 507,
      "Label": "Mailing list"
    }
```

```
      ]
    },
    {
      "FieldName": "Directory listing text",
      "Value": null
    },
    {
      "FieldName": "Member only 2",
      "Value": null
    }
  ],
  "Id": 725060,
```

```
  "Url": "http://api.wildapricot.org/v2/accounts/42353/Contacts/725060"
}
```


Sample XML response

Click here to expand/collapse


```
<Contact xmlns:i="http://www.w3.org/2001/XMLSchema-instance"
xmlns="http://api.wildapricot.org">
  <DisplayName>Steve Andrews</DisplayName>
  <Email>steve@wildapricot.com</Email>
  <FieldValues>
    <ContactField>
      <CustomAccessLevel i:nil="true" />
      <FieldName>Archived</FieldName>
      <Value xmlns:d4p1="http://www.w3.org/2001/XMLSchema"
i:type="d4p1:boolean">false</Value>
    </ContactField>
    <ContactField>
      <CustomAccessLevel i:nil="true" />
      <FieldName>Donor</FieldName>
      <Value xmlns:d4p1="http://www.w3.org/2001/XMLSchema"
i:type="d4p1:boolean">false</Value>
    </ContactField>
    <ContactField>
      <CustomAccessLevel i:nil="true" />
      <FieldName>Event registrant</FieldName>
      <Value xmlns:d4p1="http://www.w3.org/2001/XMLSchema"
i:type="d4p1:boolean">false</Value>
    </ContactField>
    <ContactField>
      <CustomAccessLevel i:nil="true" />
      <FieldName>Member</FieldName>
      <Value xmlns:d4p1="http://www.w3.org/2001/XMLSchema"
i:type="d4p1:boolean">true</Value>
    </ContactField>
    <ContactField>
      <CustomAccessLevel i:nil="true" />
      <FieldName>Suspended member</FieldName>
      <Value xmlns:d4p1="http://www.w3.org/2001/XMLSchema"
i:type="d4p1:boolean">false</Value>
    </ContactField>
    <ContactField>
      <CustomAccessLevel i:nil="true" />
      <FieldName>Notes</FieldName>
      <Value xmlns:d4p1="http://www.w3.org/2001/XMLSchema"
i:type="d4p1:string">Notes updated during import on 27 May 2014.
Renewal processed on 30 May 2014 from 24 Apr 2014 until 24 Apr 2014.</Value>
    </ContactField>
    <ContactField>
      <CustomAccessLevel i:nil="true" />
      <FieldName>Event announcements</FieldName>
      <Value xmlns:d4p1="http://www.w3.org/2001/XMLSchema"
i:type="d4p1:boolean">true</Value>
    </ContactField>
    <ContactField>
      <CustomAccessLevel i:nil="true" />
```

```
      <FieldName>Member emails and newsletters</FieldName>
      <Value xmlns:d4p1="http://www.w3.org/2001/XMLSchema"
i:type="d4p1:boolean">true</Value>
    </ContactField>
    <ContactField>
      <CustomAccessLevel i:nil="true" />
      <FieldName>Email delivery disabled</FieldName>
      <Value xmlns:d4p1="http://www.w3.org/2001/XMLSchema"
i:type="d4p1:boolean">false</Value>
    </ContactField>
    <ContactField>
      <CustomAccessLevel i:nil="true" />
      <FieldName>Receiving emails disabled</FieldName>
      <Value xmlns:d4p1="http://www.w3.org/2001/XMLSchema"
i:type="d4p1:boolean">false</Value>
    </ContactField>
    <ContactField>
      <CustomAccessLevel i:nil="true" />
      <FieldName>Balance</FieldName>
      <Value xmlns:d4p1="http://www.w3.org/2001/XMLSchema"
i:type="d4p1:decimal">0</Value>
    </ContactField>
    <ContactField>
      <CustomAccessLevel i:nil="true" />
      <FieldName>Total donated</FieldName>
      <Value xmlns:d4p1="http://www.w3.org/2001/XMLSchema"
i:type="d4p1:decimal">0</Value>
    </ContactField>
    <ContactField>
      <CustomAccessLevel i:nil="true" />
      <FieldName>Registered for specific event</FieldName>
      <Value i:nil="true" />
    </ContactField>
    <ContactField>
      <CustomAccessLevel i:nil="true" />
      <FieldName>Profile last updated</FieldName>
      <Value xmlns:d4p1="http://schemas.datacontract.org/2004/07/System"
i:type="d4p1:DateTimeOffset">
        <d4p1:DateTime>2014-06-12T19:09:16Z</d4p1:DateTime>
        <d4p1:OffsetMinutes>-240</d4p1:OffsetMinutes>
      </Value>
    </ContactField>
    <ContactField>
      <CustomAccessLevel i:nil="true" />
      <FieldName>Profile last updated by</FieldName>
      <Value xmlns:d4p1="http://www.w3.org/2001/XMLSchema"
i:type="d4p1:int">725060</Value>
    </ContactField>
    <ContactField>
      <CustomAccessLevel i:nil="true" />
      <FieldName>Creation date</FieldName>
      <Value xmlns:d4p1="http://schemas.datacontract.org/2004/07/System"
i:type="d4p1:DateTimeOffset">
        <d4p1:DateTime>2014-05-27T13:50:49Z</d4p1:DateTime>
        <d4p1:OffsetMinutes>-240</d4p1:OffsetMinutes>
      </Value>
    </ContactField>
    <ContactField>
      <CustomAccessLevel i:nil="true" />
```

```
      &lt;FieldName&gt;Last login date&lt;/FieldName&gt;
      <Value xmlns:d4p1="http://schemas.datacontract.org/2004/07/System"
i:type="d4p1:DateTimeOffset">
        &lt;d4p1:DateTime&gt;2014-07-14T13:26:54Z&lt;/d4p1:DateTime&gt;
        &lt;d4p1:OffsetMinutes&gt;-240&lt;/d4p1:OffsetMinutes&gt;
      &lt;/Value&gt;
    &lt;/ContactField&gt;
    &lt;ContactField&gt;
      &lt;CustomAccessLevel i:nil="true" /&gt;
      &lt;FieldName&gt;Terms of use accepted&lt;/FieldName&gt;
      <Value xmlns:d4p1="http://www.w3.org/2001/XMLSchema"
i:type="d4p1:boolean">true&lt;/Value&gt;
    &lt;/ContactField&gt;
    &lt;ContactField&gt;
      &lt;CustomAccessLevel i:nil="true" /&gt;
      &lt;FieldName&gt;Member ID&lt;/FieldName&gt;
      <Value xmlns:d4p1="http://www.w3.org/2001/XMLSchema"
i:type="d4p1:int">725060&lt;/Value&gt;
    &lt;/ContactField&gt;
    &lt;ContactField&gt;
      &lt;CustomAccessLevel i:nil="true" /&gt;
      &lt;FieldName&gt;First name&lt;/FieldName&gt;
      <Value xmlns:d4p1="http://www.w3.org/2001/XMLSchema"
i:type="d4p1:string">Steve&lt;/Value&gt;
    &lt;/ContactField&gt;
    &lt;ContactField&gt;
      &lt;CustomAccessLevel i:nil="true" /&gt;
      &lt;FieldName&gt;Last name&lt;/FieldName&gt;
      <Value xmlns:d4p1="http://www.w3.org/2001/XMLSchema"
i:type="d4p1:string">Andrews&lt;/Value&gt;
    &lt;/ContactField&gt;
    &lt;ContactField&gt;
      &lt;CustomAccessLevel i:nil="true" /&gt;
      &lt;FieldName&gt;Organization&lt;/FieldName&gt;
      <Value xmlns:d4p1="http://www.w3.org/2001/XMLSchema"
i:type="d4p1:string">Keep It Wild&lt;/Value&gt;
    &lt;/ContactField&gt;
    &lt;ContactField&gt;
      &lt;CustomAccessLevel i:nil="true" /&gt;
      &lt;FieldName&gt;e-Mail&lt;/FieldName&gt;
      <Value xmlns:d4p1="http://www.w3.org/2001/XMLSchema"
i:type="d4p1:string">steve@wildapricot.com&lt;/Value&gt;
    &lt;/ContactField&gt;
    &lt;ContactField&gt;
      &lt;CustomAccessLevel i:nil="true" /&gt;
      &lt;FieldName&gt;Phone&lt;/FieldName&gt;
      &lt;Value xmlns:d4p1="http://www.w3.org/2001/XMLSchema" i:type="d4p1:string"&gt;
      &lt;/Value&gt;
    &lt;/ContactField&gt;
    &lt;ContactField&gt;
      &lt;CustomAccessLevel i:nil="true" /&gt;
      &lt;FieldName&gt;State/Province&lt;/FieldName&gt;
      &lt;Value i:type="ListItem"&gt;
        &lt;ExtraCost i:nil="true" /&gt;
        &lt;Id&gt;137435&lt;/Id&gt;
        &lt;Label&gt;California&lt;/Label&gt;
        &lt;Position i:nil="true" /&gt;
        &lt;SelectedByDefault i:nil="true" /&gt;
        &lt;Value i:nil="true" /&gt;
```

```
      </Value>
    </ContactField>
    <ContactField>
      <CustomAccessLevel i:nil="true" />
      <FieldName>Member only</FieldName>
      <Value i:nil="true" />
    </ContactField>
    <ContactField>
      <CustomAccessLevel i:nil="true" />
      <FieldName>Member role</FieldName>
      <Value xmlns:d4p1="http://www.w3.org/2001/XMLSchema"
i:type="d4p1:string">Individual</Value>
    </ContactField>
    <ContactField>
      <CustomAccessLevel i:nil="true" />
      <FieldName>Member since</FieldName>
      <Value xmlns:d4p1="http://schemas.datacontract.org/2004/07/System"
i:type="d4p1:DateTimeOffset">
        <d4p1:DateTime>2013-07-11T00:00:00Z</d4p1:DateTime>
        <d4p1:OffsetMinutes>-240</d4p1:OffsetMinutes>
      </Value>
    </ContactField>
    <ContactField>
      <CustomAccessLevel i:nil="true" />
      <FieldName>Renewal due</FieldName>
      <Value xmlns:d4p1="http://schemas.datacontract.org/2004/07/System"
i:type="d4p1:DateTimeOffset">
        <d4p1:DateTime>2014-04-24T00:00:00Z</d4p1:DateTime>
        <d4p1:OffsetMinutes>-240</d4p1:OffsetMinutes>
      </Value>
    </ContactField>
    <ContactField>
      <CustomAccessLevel i:nil="true" />
      <FieldName>Membership level ID</FieldName>
      <Value xmlns:d4p1="http://www.w3.org/2001/XMLSchema"
i:type="d4p1:int">29879</Value>
    </ContactField>
    <ContactField>
      <CustomAccessLevel i:nil="true" />
      <FieldName>Access to profile by others</FieldName>
      <Value xmlns:d4p1="http://www.w3.org/2001/XMLSchema"
i:type="d4p1:boolean">false</Value>
    </ContactField>
    <ContactField>
      <CustomAccessLevel i:nil="true" />
      <FieldName>Renewal date last changed</FieldName>
      <Value i:nil="true" />
    </ContactField>
    <ContactField>
      <CustomAccessLevel i:nil="true" />
      <FieldName>Level last changed</FieldName>
      <Value i:nil="true" />
    </ContactField>
    <ContactField>
      <CustomAccessLevel i:nil="true" />
      <FieldName>Bundle ID</FieldName>
      <Value i:nil="true" />
    </ContactField>
    <ContactField>
```

```
      <CustomAccessLevel i:nil="true" />
      <FieldName>Membership status</FieldName>
      <Value xmlns:d4p1="http://www.w3.org/2001/XMLSchema"
i:type="d4p1:string">Active</Value>
    </ContactField>
    <ContactField>
      <CustomAccessLevel i:nil="true" />
      <FieldName>Job title</FieldName>
      <Value xmlns:d4p1="http://www.w3.org/2001/XMLSchema"
i:type="d4p1:string">Graphic designer</Value>
    </ContactField>
    <ContactField>
      <CustomAccessLevel i:nil="true" />
      <FieldName>Website</FieldName>
      <Value i:nil="true" />
    </ContactField>
    <ContactField>
      <CustomAccessLevel i:nil="true" />
      <FieldName>Address</FieldName>
      <Value i:nil="true" />
    </ContactField>
    <ContactField>
      <CustomAccessLevel i:nil="true" />
      <FieldName>City</FieldName>
      <Value xmlns:d4p1="http://www.w3.org/2001/XMLSchema"
i:type="d4p1:string">San Diego</Value>
    </ContactField>
    <ContactField>
      <CustomAccessLevel i:nil="true" />
      <FieldName>Postal code</FieldName>
      <Value i:nil="true" />
    </ContactField>
    <ContactField>
      <CustomAccessLevel i:nil="true" />
      <FieldName>Province/State</FieldName>
      <Value i:nil="true" />
    </ContactField>
    <ContactField>
      <CustomAccessLevel i:nil="true" />
      <FieldName>Country</FieldName>
      <Value xmlns:d4p1="http://www.w3.org/2001/XMLSchema"
i:type="d4p1:string">United States</Value>
    </ContactField>
    <ContactField>
      <CustomAccessLevel i:nil="true" />
      <FieldName>Groups</FieldName>
      <Value i:type="ArrayOfListItem">
        <ListItem>
          <ExtraCost i:nil="true" />
          <Id>507</Id>
          <Label>Mailing list</Label>
          <Position i:nil="true" />
          <SelectedByDefault i:nil="true" />
          <Value i:nil="true" />
        </ListItem>
      </Value>
    </ContactField>
    <ContactField>
      <CustomAccessLevel i:nil="true" />
```

```
      <FieldName>Directory listing text</FieldName>
      <Value i:nil="true" />
    </ContactField>
    <ContactField>
      <CustomAccessLevel i:nil="true" />
      <FieldName>Member only 2</FieldName>
      <Value i:nil="true" />
    </ContactField>
  </FieldValues>
  <FirstName>Steve</FirstName>
  <Id>725060</Id>
  <LastName>Andrews</LastName>
  <MembershipEnabled>true</MembershipEnabled>
  <MembershipLevel>
    <Id>29879</Id>

<Url>http://api.wildapricot.org/v2/accounts/42353/MembershipLevels/29879</Url>
    <Name>Platinum</Name>
  </MembershipLevel>
  <Password i:nil="true" />
  <ProfileLastUpdated
xmlns:d2p1="http://schemas.datacontract.org/2004/07/System">
    <d2p1:DateTime>2014-06-12T19:09:16Z</d2p1:DateTime>
    <d2p1:OffsetMinutes>-240</d2p1:OffsetMinutes>
  </ProfileLastUpdated>
  <Status>Active</Status>
```

```
  <Url>http://api.wildapricot.org/v2/accounts/42353/Contacts/725060</Url>
</Contact>
```

Filtering the results

You can filter the results of the Contacts API call so that only those records that match the filter criteria will be included. For example, you might want to retrieve only those contact records that have been added or updated after a certain date.

> Filtering your search results can significantly reduce server response time.

Click here to expand/collapse

You can filter using any field returned by the ContactFields API V2 call. Within your filter criteria, you can use relational operators to include ranges of contacts, and use logical operators to combine multiple critieria.

$filter syntax

```
GET
https://api.wildapricot.org/{version}/Accounts/{accountID}/Contacts?$filter={filterCriteria}
```

where *{filterCriteria}* is the criteria to be used to filter the search results.

Example:

```
GET https://api.wildapricot.org/v2/Accounts/58293/Contacts?$filter=Balance gt 100
```

In this example, only contacts whose balance is greater than 100 will be included in the search results.

Relational operators

You can use the following relational operators within your search criteria.

Operator	Description	Field types	Example
eq	Equal to	All	$filter='State/Prov' eq 'California'
ne	Not equal to	All	$filter=Organization ne 'Microsoft'
gt	Greater than	Number, DateTime	$filter=Balance gt 100
ge	Great than or equal to	Number, DateTime	$filter='Member since' ge 2010-01-01
lt	Less than	Number, DateTime	$filter='Total donated' lt 100
le	Less than or equal to	Number, DateTime	$filter='Renewal due' le 2013-08-25
substringof	Field includes specified value using the following format: substringof('field', 'value')	String	$filter=substringof('Job title', 'Designer')

Field names that include spaces or special characters (such as ? < &) must be enclosed within single quotation marks.

Using the NULL constant, you can include or exclude contacts based on whether a particular field does or does not have a value. For example, if you wanted to include only contacts with a specified job title, the filter criteria might look something like this:

```
$filter='Job title' ne NULL
```

When specifying a value for date fields, you must use the *yyyy-mm-dd* date format, as shown in the following example:

```
$filter='Profile last updated' ge 2013-06-25
```

Logical operators

You can use logical operators – AND and OR – to group multiple search criteria, and control whether either or both criteria must satisfied.

In the following example...

```
$filter='State/Prov' eq 'California' AND Organization eq 'Google'
```

...contacts must reside in California **and** work for Google to be included in the search results.

In this example...

```
$filter=Total donated'gt 500 OR 'Member since' ge 2010-01-01
```

...contacts will included in the search results if they have donated more than $500 **or** if they have been members since January 1, 2010.

You can use brackets to control *precedence* – the order in which multiple criteria are evaluated within your search criteria. Normally, criteria joined by an AND operator are evaluated ahead of criteria joined by an OR operator. However, any criteria surrounded by brackets will be given priority and evaluated ahead of any other criteria.

In the following example....

```
$filter=A and B or C
```

...contacts would have to satisfy both the A and B criteria – or satisfy the C criteria alone – to be included in the results. If, however, you place brackets as shown here...

```
$filter=A and (B or C)
```

...then contacts would have to satisfy either the B or C criteria, as well as the A criteria.

Single quotation marks escaping

If a field name contains a single quotation mark, character escaping should be applied to $filter and $select parameters using the escape sequence \'. For example, to filter using a custom field with a name of **my custom' field**, you would use the following approach:

```
$filter='my custom\' field' eq 'some value'&$select=id,'my custom\' field
```

Filtering using multi-option fields

When filtering using multi-option fields, you can reference individual choices using either the option ID or the option label.

Multi-option fields include those with a field type of *Choice* (radio buttons, dropdown, radio buttons with extra charge) or *MultipleChoice* (

multiple choice, multiple choice with extra charge).

For each field, the field type is returned by the ContactFields API call. For multi-option fields, the ID and label is returned for each field as well under **AllowedValues**.

In the following example, a dropdown **Membership status** field has values of either *Active*, *Lapsed*, *PendingNew*, or *PendingRenewal*.

```
"FieldName": "Membership status",
"Type": "Choice",
"IsSystem": true,
"Access": "AdminOnly",
"AllowedValues": [
    {
        "Id": 1,
        "Label": "Active"
    },
    {
        "Id": 2,
        "Label": "Lapsed"
    },
    {
        "Id": 20,
        "Label": "PendingNew"
    },
    {
        "Id": 3,
        "Label": "PendingRenewal"
    }

  ]
```

If you wanted to limit search results to contacts with a **Membership status** of *Lapsed*, you could use either the option ID of *2*, or the option label of *Lapsed*. To indicate whether you are referencing the option using the ID or the label, you include a suffix of either *.Id* or *.Label* following the field name. To limit search results to contacts with a **Membership status** of *Lapsed* using the option ID, your filter criteria would appear as follows:

```
$filter='Membership status.Id' eq 2
```

To limit search results using the label ID, your filter criteria would look like this:

If the field name contains spaces or special characters, you must enclose the field name and the suffix within quotation marks. For example:

```
$filter='Optional extras.Label' eq ‘Newsletter’
```

Paging

Using the **$skip** and **$top** parameters, you can retrieve contact records in sets or pages. You use the $top parameter to specify the maximum number of records to be returned, and the $skip parameter to specify the number of records to skip. The $skip parameter is incremented each call to return the next set or page of records.

Paging can be applied both in synchronous and asynchronous search results. In a synchronous call, the paging parameters are specified along with the $filter and $select parameters. In asynchronous calls, these parameters are specified when retrieving the result, together with the resultId parameter.

Example

You want to retrieve records for the 50 contacts who reside in California, using an application that can only process 20 records at a time. Using the following calls, the application retrieves the first set of 20 records, then a second set of 20, and finally, the remaining 10 records.

```
https://api.wildapricot.org/v2/Accounts/58293/Contacts?$async=false&$filter='State/P
rov' eq 'California'&$skip=0&$top=20
https://api.wildapricot.org/v2/Accounts/58293/Contacts?$async=false&$filter='State/P
rov' eq 'California'&$skip=20&$top=20
https://api.wildapricot.org/v2/Accounts/58293/Contacts?$async=false&$filter='State/P
rov' eq 'California'&$skip=40&$top=20
```

In this example, the $top specifies the maximum number of records to retrieve (20), and the $skip parameter is incremented from 0 to 20 to 40 to skip the records retrieved by the previous call(s).

Selecting response fields

Using the $select parameter, you can control which fields are returned by the Contacts API call.

$select syntax

```
GET https://api.wildapricot.org/v2/Accounts/{accountID}/Contacts?$select={fieldlist}
```

where *{fieldlist}* is a list of fields to be included in the results. When you use the $parameter, only fields specified by the parameter will be included in the search results.

Example:

```
GET https://api.wildapricot.org/v2/Accounts/58293/Contacts?$select='Member ID',
'Membership status', 'First name', 'Last name'
```

The field names correspond to the fields returned by the ContactFields API call, not the field names that appear in Wild Apricot. Multiple field names are separated by commas, and field names with spaces or special characters are enclosed in single quotation marks.

Retrieving a list of contact IDs

You can retrieve a list of contact IDs by submitting a synchronous search request and including the **idsOnly** parameter.

Syntax

```
GET
http://api.wildapricot.org/{version}/Accounts/{accountID}/Contacts/?$async=false&ids
Only
```

Example

```
GET http://api.wildapricot.org/v2/accounts/42353/Contacts/?$async=false&idsOnly
```

Creating a new contact record

You can use a Contacts API call to create a new contact record.

Syntax

```
POST https://api.wildapricot.org/{version}/Accounts/{accountID}/Contacts/
{
  "contactField": contactFieldValue,
  "contactField": contactFieldValue,
 ...
}
```

Parameters

Field	Description
Id	The ID of the contact as displayed on their contact record.
FirstName	The contact's first name.
LastName	The contact's last name.
Email	The contact's email address.
Password	The contact's password.
MembershipLevel	The name and URL of the membership level assigned to the contact. If the contact is not a member, then the MembershipLevel field is not included in the results.
MembershipEnabled	Indicates whether the contact is a member. A value of false indicates that the contact is a not a member or is a suspended member.
Status	The status of the contact's membership. Possible values are *Active*, *Lapsed*, *PendingNew*, *PendingRenewal*, and *PendingLevelChange* . The status can only be updated if the contact is a member.
FieldValues	For each custom field you have added to your Wild Apricot database, the name of the field and its value for this contact are returned. To identify the field, you can use **FieldName** or **SystemC ode**. SystemCode is a unique field identifier and can be used instead of FieldName for more accurate field identification. If both FieldName and SystemCode are defined, the field will be searched first by SystemCode and then by FieldName, (where there are no fields with the specified SystemCode). If only FieldName is defined and there are two fields that use it – system and custom – then only the system field will be updated.
RecreateInvoice	Indicates whether an invoice needs to be created. Default value is *t rue*.

- The contact ID should be 0 or should not be specified.
- There are no required fields.

Example

```
POST https://api.wildapricot.org/v2/Accounts/58293/Contacts/
{
  "FirstName": "Anatoly",
  "LastName": "Fedyanin1",
  "Email": "anfe@asd.com",
  "MembershipLevel": {
    "Id": 9144
  },
  "MembershipEnabled": true,
  "Status": "Active",
  "FieldValues": [
    {
      "FieldName": "Archived",
      "Value": false
    },
    {
      "SystemCode": "custom-123442", // You can use SystemCode instead of FieldName
to identify fields
      "Value": true
    },
    {
      "FieldName": "Donor",
      "Value": true
    },
    {
      "FieldName": "Subscription source",
      "Value": [
        {
          "Id": 1,
          "Label": "First subscription form"
        },
        {
          "Id": 827,
          "Label": "SUbscription"
        }
      ]
    },
    {
      "FieldName": "Organization",
      "Value": "wild-wild-apricot"
    }
  ]
}
```

An HTTP 400 error will be returned if:

- Any of the fields include invalid data
- The billing plan contact limit is reached

The error description will indicate the nature of the error. For more information, see API V2 status codes.

Updating contact records

You can update an existing contact record using a Contacts API call.

Syntax

```
PUT {baseAPIaddress}/{version}/Accounts/{accountID}/Contacts/{contactID}
{
  "Id": contactID,
  "contactField": contactFieldValue,
  "contactField": contactFieldValue,
 ...
}
```

Parameters

Field	Description
Id	The ID of the contact as displayed on their contact record.
FirstName	The contact's first name.
LastName	The contact's last name.
Email	The contact's email address.
Password	The contact's password.
MembershipLevel	The name and URL of the membership level assigned to the contact. If the contact is not a member, then the MembershipLevel field is not included in the results.
MembershipEnabled	Indicates whether the contact is a member. A value of false indicates that the contact is a not a member or is a suspended member.
Status	The status of the contact's membership. Possible values are *Active*, *Lapsed*, *PendingNew*, *PendingRenewal*, and *PendingLevelChange*. The status can only be updated if the contact is a member.
FieldValues	For each custom field you have added to your Wild Apricot database, the name of the field and its value for this contact are returned. To identify the field, you can use **FieldName** or **SystemCode**. SystemCode is a unique field identifier and can be used instead of FieldName for more accurate field identification. If both FieldName and SystemCode are defined, the field will be searched first by SystemCode and then by FieldName, (where there are no fields with the specified SystemCode). If only FieldName is defined and there are two fields that use it – system and custom – then only the system field will be updated.
RecreateInvoice	Indicates whether an invoice needs to be created. Default value is *true*.

- The contact ID must be specified. All other contact fields are optional.
- For multi-option fields – those with a field **Type** of *Choice* (radio buttons, dropdown, extra charges radio buttons) or *MultipleChoice* (multiple choice, extra charge multiple choice) – you can use reset the field value by setting the **Label** to **null** (and not specifying the field ID).
- If you want to update picture fields, you must specify v2.1 as the API version.

Example

```
PUT https://api.wildapricot.org/v2/Accounts/58293/Contacts/725060
{
  "Id": 725060,
  "FirstName": "Steve",
  "LastName": "Andrews",
  "Email": "steve@test.com",
  "MembershipLevel": {
    "Id": 9144
  },
  "MembershipEnabled": true,
  "Status": "Active",
  "FieldValues": [
    {
      "FieldName": "Archived",
      "Value": false
    },
    {
      "SystemCode": "custom-123442", // You can use SystemCode instead of FieldName
to identify fields
      "Value": true
    },
    {
      "FieldName": "Donor",
      "Value": true
    },
    {
      "FieldName": "Subscription source",
      "Value": [
        {
          "Label": null
        }
      ]
    },
    {
      "FieldName": "Organization",
      "Value": "Wild Apricot"
    }
  ]
}
```

Updating membership levels

You can update a contact's membership level using a Contacts API call. If you are assigning a contact to a membership bundle, you can specify the bundle ID and designate the contact as a bundle administrator.

> You can retrieve bundle IDs using the Bundles API V2 call.

Syntax

```
PUT {baseAPIaddress}/v2/Accounts/{accountID}/Contacts/{contactID}
{
    "Id": CONTACT_ID,
    "MembershipLevel":{
        "Id": NEW_LEVEL_ID
    },
    "FieldValues":[
        // optionaly bundle ID can be specified
        {
            "FieldName": "Bundle ID",
            "Value": EXISTING_BUNDLE_ID
        },
        // optionaly bundle member role can be specified
        {
            "FieldName":"Member role",
            "Value": "MEMBER_ROLE"
        },
        ...
    ],
    ...
}
```

- MEMBER_ROLE can be either *Bundle administrator* or *Bundle member*. If not specified, it defaults to *Bundle member*.
- If the contact is already a bundle administrator, you can only change their level to another bundle level. All members within the original bundle will be moved along with the bundle administrator.
- If you move a contact to a bundle level without specifying the bundle ID, then the contact automatically becomes a bundle administrator.
- If you specify the bundle ID when you move a contact to a bundle level, their role is derived from the **Member role** field.

Example

```
PUT https://api.wildapricot.org/v2/Accounts/58293/Contacts/725060
{
    "Id": CONTACT_ID,
    "MembershipLevel":{
        "Id": 257271
    },
    "FieldValues":[
        // optionaly bundle ID can be specified
        {
            "FieldName": "Bundle ID",
            "Value": 9086
        },
        // optionaly bundle member role can be specified
        {
            "FieldName":"Member role",
            "Value":"Bundle administrator"
        },
        ...
    ],
    ...
}
```

Deleting an archived contact

Syntax

```
DELETE {baseAPIaddress}/v2/Accounts/{accountID}/Contacts/{contactID}
```

Example

```
DELETE https://api.wildapricot.org/v2/Accounts/58293/Contacts/725060
```

On this page:

See also:

- API V2 authentication
- API V2 calls
- ContactFields API V2 call

EventRegistrations API V2 call

EventRegistrations API V2 call

Wild Apricot's API is intended for use by developers with technical expertise. If you need assistance, we provide support via email o r through our Developers forum.

You can use the EventRegistrations API call to retrieve a list of event registrations for a particular event or contact, and to retrieve details for a particular registration. You can also add, update, or delete event registrations using this API call.

You can use the EventRegistrations API to migrate old event registrations to your Wild Apricot database.

Retrieving registrations for a particular contact

Syntax

```
GET
{baseAPIaddress}/v2/Accounts/{accountID}/EventRegistrations?contactId={contactID}
```

Example

```
GET
https://api.wildapricot.org/v2/Accounts/58293/EventRegistrations?contactId=725295
```

Retrieving registrations for a particular event

Syntax

```
GET {baseAPIaddress}/v2/Accounts/{accountID}/EventRegistrations?eventId={eventID}
```

Example

```
GET https://api.wildapricot.org/v2/Accounts/58293/EventRegistrations?eventId=11769
```

You can specify both a contact and an event – e.g. ?contactId=725295&eventId=11769 – to further narrow the results.

Retrieving specific registrations

You can filter the registrations returned by the EventRegistrations API call by specifying a list of registration IDs. Only registrations with the specified IDs will be retrieved.

Syntax

```
GET {baseAPIaddress}/v2/Accounts/{accountID}/EventRegistrations?$filter=ID in
[1,2,3,4…]
```

Example

```
GET https://api.wildapricot.org/v2/Accounts/58293/EventRegistrations?$filter=ID in
[1,2,7,9]
```

Retrieving event registration details

Syntax

```
GET
{baseAPIaddress}/v2/Accounts/{accountID}/EventRegistrations/{eventRegistrationID}
```

Example:

```
GET https://api.wildapricot.org/v2/Accounts/58293/EventRegistrations/112745
```

Parameters

The following parameters are used within the EventRegistrations API call:

Variable	Description
{baseAPIaddress}	The base address of the API. For more information, see API access options.
{accountID}	The account identifier that appears on the Account and billing screen and is returned by the Accounts API call.
{contactID}	The unique identifier for a contact. Contacts IDs are returned by the Contacts API call.
{eventID}	The unique identifier of an event. Event IDs are returned by the Eve nts API call.
{eventRegistrationID}	The unique identifier of an event registration. Event registration IDs are returned by the EventRegistrations API call.

Each API call must include an authentication information that verifies your account and prevents others from accessing your data. For more information, see Authenticating API access from a 3rd-party server or application or Authenticating API access from a Wild Apricot site page.

Response fields

For each invoice, the EventRegistrations API call retrieves the following information.

Field	Description
ID	The unique identifier of the event registration.
URL	The address of the URL call for the event registration.
Event	The start date, ID, URL, and name of the event.
Contact	The ID and URL of the registrant.
IsCheckedIn	Indicates whether the registrant has been checked in to the event.
RegistrationFee	The fee for the registration.
PaidSum	The amount paid towards the registration fee.
Invoice	The ID and URL of the invoice for the registration.
RegistrationTypeID	The ID of the registration type.
IsPaid	Indicates whether the registration has a status of Paid.
RegistrationFields	The name and value of the fields appearing on the registration form for this registration. To identify the field, you can use **FieldName** or **SystemCode**. SystemCode is a unique field identifier and can be used instead of FieldName for more accurate field identification. If both FieldName and SystemCode are defined, the field will be searched first by SystemCode and then by FieldName, (where there are no fields with the specified SystemCode). If only FieldName is defined and there are two fields that use it – system and custom – then only the system field will be updated.
ShowToPublic	Indicates whether the registrant is included in the public list of event registrants.
RegistrationDate	The date of the registration.

Memo	Any internal notes entered for the registration.
GuestRegistrationsSummary	A summary of guest registrations for this registration. **Field** — **Description** NumberOfGuests — The number of guests for this registration, if guest registrations are set up to collect only the total number of guests. NumberOfGuestsCheckIn — The number of guests under this registration who have been checked in, where guest registrations have been set up to collect only the total number of guests. GuestRegistrations — The contact ID and URL of each guest, if guest registrations are set up to collect contact information or full registration information for each guest.
IsGuestRegistration	Indicates whether the registration is a guest registration.
ParentRegistration	The ID and URL of the parent registration. The value is NULL if registration is not a guest registration.

Sample JSON response


```
{
 "Event": {
   "StartDate": "2015-09-10T20:00:00-04:00",
   "Id": 11769,
   "Url": "http://api.wildapricot.org/v2/accounts/42353/Events/11769",
   "Name": "Annual General Meeting"
 },
 "Contact": {
   "Id": 725188,
   "Url": "http://api.wildapricot.org/v2/accounts/42353/Contacts/725188"
 },
 "IsCheckedIn": false,
 "RegistrationFee": 26.03,
 "PaidSum": 26.03,
 "Invoice": {
   "Id": 206301,
   "Url": "http://api.wildapricot.org/v2/accounts/42353/Invoices/206301"
 },
 "RegistrationTypeId": 29522,
 "IsPaid": false,
 "RegistrationFields": [
   {
     "FieldName": "Section",
     "Value": null
   },
```

```
    {
      "FieldName": "First name",
      "Value": "John"
    },
    {
      "FieldName": "Country",
      "Value": ""
    },
    {
      "FieldName": "Last name",
      "Value": "Didsbury"
    },
    {
      "FieldName": "Organization",
      "Value": "Type Factory"
    },
    {
      "FieldName": "e-Mail",
      "Value": "jdidsbury@test.com"
    },
    {
      "FieldName": "Phone",
      "Value": ""
    },
    {
      "FieldName": "State/Province",
      "Value": {
        "Id": 137447,
        "Label": "Washington"
      }
    }
  ],
  "ShowToPublic": false,
  "RegistrationDate": "2014-06-12T04:00:00+04:00",
  "Memo": "",
  "GuestRegistrationsSummary": {
    "NumberOfGuests": 0,
    "NumberOfGuestsCheckedIn": 0,
    "GuestRegistrations": []
  },
```

```
  "Id": 112745,
  "Url": "http://api.wildapricot.org/v2/accounts/42353/EventRegistrations/112745"
}
```


Sample XML response


```
<EventRegistration xmlns:i="http://www.w3.org/2001/XMLSchema-instance"
xmlns="http://schemas.datacontract.org/2004/07/Bonasource.MembershipFS.PublicAPI.Mod
el.V2.Events">
  <Id xmlns="http://api.wildapricot.org">112745</Id>
  <Url
xmlns="http://api.wildapricot.org">http://api.wildapricot.org/v2/accounts/42353/Even
tRegistrations/112745</Url>
  <CheckInStatusChangeDate
xmlns:d2p1="http://schemas.datacontract.org/2004/07/System">
    <d2p1:DateTime>2014-07-14T09:51:24Z</d2p1:DateTime>
    <d2p1:OffsetMinutes>240</d2p1:OffsetMinutes>
  </CheckInStatusChangeDate>
  <CheckInStatusChangedBy xmlns:d2p1="http://api.wildapricot.org">
    <d2p1:Id>725060</d2p1:Id>

<d2p1:Url>http://api.wildapricot.org/v2/accounts/42353/Contacts/725060</d2p1:Url>
  </CheckInStatusChangedBy>
  <Contact xmlns:d2p1="http://api.wildapricot.org">
    <d2p1:Id>725188</d2p1:Id>

<d2p1:Url>http://api.wildapricot.org/v2/accounts/42353/Contacts/725188</d2p1:Url>
  </Contact>
  <Event>
    <Id xmlns="http://api.wildapricot.org">11769</Id>
    <Url
xmlns="http://api.wildapricot.org">http://api.wildapricot.org/v2/accounts/42353/Even
ts/11769</Url>
    <Name xmlns="http://api.wildapricot.org">Annual General Meeting</Name>
    <StartDate xmlns:d3p1="http://schemas.datacontract.org/2004/07/System">
      <d3p1:DateTime>2015-09-11T00:00:00Z</d3p1:DateTime>
      <d3p1:OffsetMinutes>-240</d3p1:OffsetMinutes>
    </StartDate>
  </Event>
  <GuestRegistrationsSummary>
    <GuestRegistrations xmlns:d3p1="http://api.wildapricot.org">
      <d3p1:LinkedResourceOfint>
        <d3p1:Id>112985</d3p1:Id>
        <d3p1:Url>/v2/accounts/42353/EventRegistrations/112985</d3p1:Url>
      </d3p1:LinkedResourceOfint>
      <d3p1:LinkedResourceOfint>
        <d3p1:Id>112986</d3p1:Id>
        <d3p1:Url>/v2/accounts/42353/EventRegistrations/112986</d3p1:Url>
      </d3p1:LinkedResourceOfint>
      <d3p1:LinkedResourceOfint>
        <d3p1:Id>112987</d3p1:Id>
        <d3p1:Url>/v2/accounts/42353/EventRegistrations/112987</d3p1:Url>
      </d3p1:LinkedResourceOfint>
    </GuestRegistrations>
    <NumberOfGuests>0</NumberOfGuests>
    <NumberOfGuestsCheckedIn i:nil="true" />
```

```
  </GuestRegistrationsSummary>
  <Invoice xmlns:d2p1="http://api.wildapricot.org">
    <d2p1:Id>206301</d2p1:Id>

<d2p1:Url>http://api.wildapricot.org/v2/accounts/42353/Invoices/206301</d2p1:Url>
  </Invoice>
  <IsCheckedIn>true</IsCheckedIn>
  <IsPaid>false</IsPaid>
  <Memo>
  </Memo>
  <PaidSum>26.0300</PaidSum>
  <RecreateInvoice i:nil="true" />
  <RegistrationDate xmlns:d2p1="http://schemas.datacontract.org/2004/07/System">
    <d2p1:DateTime>2014-06-12T00:00:00Z</d2p1:DateTime>
    <d2p1:OffsetMinutes>240</d2p1:OffsetMinutes>
  </RegistrationDate>
  <RegistrationFee>104.1000</RegistrationFee>
  <RegistrationFields>
    <EventField>
      <FieldName>First name</FieldName>
      <Value xmlns:d4p1="http://www.w3.org/2001/XMLSchema"
i:type="d4p1:string">John</Value>
    </EventField>
    <EventField>
      <FieldName>Last name</FieldName>
      <Value xmlns:d4p1="http://www.w3.org/2001/XMLSchema"
i:type="d4p1:string">Didsbury</Value>
    </EventField>
    <EventField>
      <FieldName>Organization</FieldName>
      <Value xmlns:d4p1="http://www.w3.org/2001/XMLSchema" i:type="d4p1:string">Type
Factory</Value>
    </EventField>
    <EventField>
      <FieldName>e-Mail</FieldName>
      <Value xmlns:d4p1="http://www.w3.org/2001/XMLSchema"
i:type="d4p1:string">jdidsbury@test.com</Value>
    </EventField>
    <EventField>
      <FieldName>Phone</FieldName>
      <Value xmlns:d4p1="http://www.w3.org/2001/XMLSchema" i:type="d4p1:string">
      </Value>
    </EventField>
    <EventField>
      <FieldName>State/Province</FieldName>
      <Value xmlns:d4p1="http://api.wildapricot.org" i:type="d4p1:ListItem">
        <d4p1:ExtraCost i:nil="true" />
        <d4p1:Id>137447</d4p1:Id>
        <d4p1:Label>Washington</d4p1:Label>
        <d4p1:Position i:nil="true" />
        <d4p1:SelectedByDefault i:nil="true" />
        <d4p1:Value i:nil="true" />
      </Value>
    </EventField>
    <EventField>
      <FieldName>Member only</FieldName>
      <Value i:nil="true" />
    </EventField>
    <EventField>
```

```
    <FieldName>Section</FieldName>
    <Value i:nil="true" />
  </EventField>
  <EventField>
    <FieldName>Country</FieldName>
    <Value xmlns:d4p1="http://www.w3.org/2001/XMLSchema" i:type="d4p1:string">
    </Value>
  </EventField>
</RegistrationFields>
```

```
  <RegistrationTypeId>29522</RegistrationTypeId>
  <ShowToPublic>false</ShowToPublic>
</EventRegistration>
```

Creating a new event registration

You can use an EventRegistrations API call to create a new event registration.

Syntax

```
POST {baseAPIaddress}/v2/Accounts/{accountID}/EventRegistrations
{
  "eventRegistrationField": eventRegistrationFieldValue,
  "eventRegistrationField": eventRegistrationFieldValue,
 ...
}
```

- The event registration ID should be 0 or should not be specified.
- The following event registration fields are required: event ID, contact ID, RegistrationTypeID, and any required registration fields.
- To identify the field, you can use **FieldName** or **SystemCode**. SystemCode is a unique field identifier and can be used instead of FieldName for more accurate field identification. If both FieldName and SystemCode are defined, the field will be searched first by SystemCode and then by FieldName, (where there are no fields with the specified SystemCode). If only FieldName is defined and there are two fields that use it – system and custom – then only the system field will be updated.
- You can create the corresponding registration invoice by including a **RecreateInvoice** field and setting it to *true* .

Example

```
POST https://api.wildapricot.org/v2/Accounts/58293/EventRegistrations
{
  "Event": {
 "Id":11769
  },
  "RegistrationTypeId":23456,
  "Contact":{
 "Id": 725188
  },
  "IscheckedIn": false,
  "IsPaid": false,
  "RegistrationFields": [
    {
      "FieldName": "First name",
      "Value": "John"
    },
    {
      "FieldName": "Last name",
      "Value": "Barrett"
    },
    {
      "FieldName": "Organization",
      "Value": "Design Partners"
    }
  ],
  "ShowToPublic": true,
  "Memo":"Important member",
  "GuestRegistrationsSummary":{
 "NumberOfGuests":1
  }
}
```

If any of the required fields are missing, or if any of the fields include invalid data, a 400 Bad Request error will be returned. For more information, see API V2 status codes.

Updating an event registration

You can update an existing event registration using an EventRegistrations API call.

Syntax

```
PUT
{baseAPIaddress}/v2/Accounts/{accountID}/EventRegistrations/{eventRegistrationID}
{
  "Id": eventRegistrationID,
  "eventRegistrationField": eventRegistrationFieldValue,
  "eventRegistrationField": eventRegistrationFieldValue,
 ...
}
```

- The event registration ID must be specified both as a field and within the requesting URL. All other event registration fields are optional.
- To identify the field, you can use **FieldName** or **SystemCode**. SystemCode is a unique field identifier and can be used instead of FieldName for more accurate field identification. If both FieldName and SystemCode are defined, the field will be searched first by SystemCode and then by FieldName, (where there are no fields with the specified SystemCode). If only

FieldName is defined and there are two fields that use it – system and custom – then only the system field will be updated.
- You can update the registration invoice to match the updated registration type and any extra cost options by including a **RecreateInvoice** field and setting it to *true*.

Example

```
PUT https://api.wildapricot.org/v2/Accounts/58293/EventRegistrations/112745
{
  "Id":112745,
  "Event": {
 "Id":11769
  },
  "RegistrationTypeId":23456,
  "Contact":{
 "Id": 725188
  },
  "IscheckedIn": false,
  "IsPaid": false,
  "RegistrationFields": [
    {
      "FieldName": "First name",
      "Value": "John"
    },
    {
      "FieldName": "Last name",
      "Value": "Barrett"
    },
    {
      "FieldName": "Organization",
      "Value": "Design Partners"
    }
  ],
  "ShowToPublic": true,
  "Memo":"Important member",
  "GuestRegistrationsSummary":{
 "NumberOfGuests":1
  }
}
```

Deleting an event registration

Syntax

```
DELETE
{baseAPIaddress}/v2/Accounts/{accountID}/EventRegistrations/{eventRegistrationID}
```

Example

```
DELETE https://api.wildapricot.org/v2/Accounts/58293/EventRegistrations/112745
```

On this page:

See also:

- API V2 authentication
- API V2 calls
- Events API V2 call

EventRegistrationTypes API V2 call

EventRegistrationTypes API V2 call

Wild Apricot's API is intended for use by developers with technical expertise. If you need assistance, we provide support via email or through our Developers forum.

You can use the EventRegistrationTypes API call to retrieve the details for an existing event registration type, or for all existing event registration type within an event. You can also create, update, and delete event registration types.

Retrieving details for an event registration type

Using the EventRegistrationTypes API call, you can retrieve details for an existing registration type.

Syntax

```
GET {baseAPIaddress}/v2/Accounts/{accountID}/EventRegistrationTypes/{typeID}
```

Example:

```
GET https://api.wildapricot.org/v2/Accounts/58293/EventRegistrationTypes/136850
```

Retrieving registration type details for an event

Using the EventRegistrationTypes API call, you can retrieve details for all registration types for a particular event.

Syntax

```
GET
{baseAPIaddress}/v2/Accounts/{accountID}/EventRegistrationTypes?eventId={eventID}
```

Example:

```
GET
https://api.wildapricot.org/v2/Accounts/58293/EventRegistrationTypes?eventId=136850
```

Parameters

The following parameters are used within the EventRegistrationTypes API call:

Variable	Description
baseAPIaddress	The base address of the API. For more information, see API access options .
accountID	The account identifier that appears on the Account and billing screen and is returned by the Accounts API call.
typeID	The unique identifier for an event registration type. Registration types IDs are returned by the EventRegistrationTypes call.
{eventID}	The unique identifier of an event. Event IDs are returned by the Eve nts API call.

Each API call must include an authentication information that verifies your account and prevents others from accessing your data. For more information, see Authenticating API access from a 3rd-party server or application or Authenticating API access from a Wild Apricot site page.

Response fields

If the call is unsuccessful, it returns HTTP 400. If successful, it retrieves the following information.

Field	Description
EventID	Unique identifier of the event.
IsEnabled	Indicates whether the registration type is enabled.
Description	Description of the registration type.
GuestRegistrationPolicy	Indicates whether registrants can register guests at the same time that they submit their own registration. Possible values are: • Disabled – guest registration is not allowed. • NumberOfGuests – specify just the number of guests. • CollectContactDetails – contact information collected for each guest. • CollectFullInfo – full registration information collected for each guest.
BasePrice	Base price for the registration type.
GuestPrice	Price for guest registrations.
UseTaxScopeSettings	Indicates whether tax scope settings are followed for this registration type.
Availability	Indicates whether this registration type is available to everyone, just certain membership levels, or to anyone with the registration code. Possible values are: Everyone, MembersOnly, CodeRequired
AvailableForMembershipLevels	(*If Availability = MembersOnly*) Indicates which membership levels can use this registration type.
RegistrationCode	(*If Availability = CodeRequired*) The registration code.
AvailableFrom	The date the registration type is available from. Possible values include null.

AvailableThrough	The date the registration type is available until. Possible values include null.
MaximumRegistrantsCount	The maximum number of registrants for this registration type.
CurrentRegistrantsCount	Current number of registrants for this registration type.
MultipleRegistrationAllowed	Indicates whether contacts can register multiple times for the same event.
UnavailabilityPolicy	Indicates what appears if this registration type is not available for a particular visitor. Possible values are: • ShowDisabled • Hide
WaitlistBehaviour	Indicates whether prospective registrants can join a waitlist after the registration limit is reached for this type, and how much information is collected from people wanting to join the waitlist. Possible values are: • Disabled • RequestNameAndEmail • RequestContactInformation • RequestRegistrationInformation
ID	The unique identifier of the registration type.
URL	The address of the URL call for the registration type.
Name	The name used to identify the registration type.

Sample JSON response


```
 {
  "EventId": 51377,
  "IsEnabled": true,
  "Description": "",
  "BasePrice": 30,
  "GuestPrice": 30,
  "UseTaxScopeSettings": false,
  "Availability": "Everyone",
  "AvailableForMembershipLevels": null,
  "GuestRegistrationPolicy": "Disabled",
  "CurrentRegistrantsCount": 0,
  "MultipleRegistrationAllowed": true,
  "WaitlistBehaviour": "Undefined",
  "UnavailabilityPolicy": "ShowDisabled",
  "Id": 136850,
  "Url":
"http://api.env8.bonasource.com/v2/accounts/13703/EventRegistrationTypes/136850",
  "Name": "Non-members"
}
```


Sample XML response

```
<EventRegistrationType xmlns:i="http://www.w3.org/2001/XMLSchema-instance"
xmlns="http://api.wildapricot.org">
  <Id>136850</Id>

<Url>http://api.env8.bonasource.com/v2/accounts/13703/EventRegistrationTypes/136850<
/Url>
  <Name>Members</Name>
  <Availability>Everyone</Availability>
  <AvailableForMembershipLevels i:nil="true" />
  <AvailableFrom xmlns:d2p1="http://schemas.datacontract.org/2004/07/System"
i:nil="true" />
  <AvailableThrough xmlns:d2p1="http://schemas.datacontract.org/2004/07/System"
i:nil="true" />
  <BasePrice>30.0000</BasePrice>
  <CurrentRegistrantsCount>1</CurrentRegistrantsCount>
  <Description>
  </Description>
  <EventId>51377</EventId>
  <GuestPrice>30.0000</GuestPrice>
  <GuestRegistrationPolicy>Disabled</GuestRegistrationPolicy>
  <IsEnabled>true</IsEnabled>
  <MaximumRegistrantsCount i:nil="true" />
  <MultipleRegistrationAllowed>true</MultipleRegistrationAllowed>
  <RegistrationCode i:nil="true" />
  <UnavailabilityPolicy>ShowDisabled</UnavailabilityPolicy>
  <UseTaxScopeSettings>false</UseTaxScopeSettings>
  <WaitlistBehaviour>Undefined</WaitlistBehaviour>
</EventRegistrationType>
```

Creating a new registration type

You can use an EventRegistrationTypes API call to create a new event registration type.

Syntax

```
POST {baseAPIaddress}/v2/Accounts/{accountID}/EventRegistrationTypes
{
  "{registrationTypeField}": {registrationTypeFieldValue},
  "{registrationTypeField}": {registrationTypeFieldValue},
 ...
}
```

where *registrationTypeField* is a field returned by the EventRegistrationTypes API call.

The registration type Name and the event ID are required.

Example

```
POST https://api.wildapricot.org/v2/Accounts/58293/EventRegistrationTypes
{
  "Name": "Free",
  "EventId": 51258,
  "IsEnabled": true,
  "Description": "free for all",
  "BasePrice": 0.0,
  "GuestPrice": 0.0,
  "UseTaxScopeSettings": true,
  "Availability": "Everyone",
  "AvailableFrom": "2016-06-15T00:00:00+03:00",
  "AvailableThrough": "2016-06-25T00:00:00+03:00",
  "GuestRegistrationPolicy": "Disabled",
  "MaximumRegistrantsCount": 10,
  "MultipleRegistrationAllowed": false,
  "WaitlistBehaviour": "Disabled",
  "UnavailabilityPolicy": "Hide"
}
```

If successful, the call will return the new event registration type ID.

If any of the required fields are missing, or if any of the fields include invalid data, a 400 Bad Request error will be returned. For more information, see API V2 status codes.

Updating a registration type

You can update an existing registration type using an EventRegistrationTypes API call.

Syntax

```
PUT {baseAPIaddress}/v2/Accounts/{accountID}/EventRegistrationTypes/{typeID}
{
  "Id": typeID,
  "{registrationTypeField}": {registrationTypeFieldValue},
  "{registrationTypeField}": {registrationTypeFieldValue},
 ...
}
```

where *registrationTypeField* is a field returned by the EventRegistrationTypes API call.

- The registration type ID must be specified both as a field and within the requesting URL. All other registration type fields are optional.
- You cannot update the eventID
- If you update UseTaxScopeSettings, AvailableFrom, or AvailableThrough, you have to provide values with each future update, or else they will be reset to their default values of *false* and *null*, respectively.

Example

```
PUT https://api.wildapricot.org/v2/Accounts/58293/EventRegistrations/112745
{
  "Id":29522,
  "Description": "free for all",
  "BasePrice": 0.0,
  "GuestPrice": 0.0,
  "UseTaxScopeSettings": true,
  "Availability": "Everyone",
  "AvailableFrom": "2016-06-15T00:00:00+03:00",
  "AvailableThrough": "2016-06-25T00:00:00+03:00",
}
```

If successful, the call returns an HTTP status code 200 without any data in the response body.

Deleting a registration type

You can use an EventRegistrationTypes API call to delete an existing registration type.

Syntax

```
DELETE {baseAPIaddress}/v2/Accounts/{accountID}/EventRegistrationTypes/{typeID}
```

where typeID is the ID of the event registration type you want to delete.

Example

```
DELETE https://api.wildapricot.org/v2/Accounts/58293/EventRegistrationTypes/29522
```

If successful, the call returns HTTP 200 Success. If unsuccessful, returns HTTP 400 bad request.

On this page:

See also:

- API V2 authentication
- API V2 calls

Events API V2 call

Events API V2 call

Wild Apricot's API is intended for use by developers with technical expertise. If you need assistance, we provide support via email or through our Developers forum.

You can use the Events API call to retrieve information about events, and to create, update, or delete an event. You can retrieve information for all events, and just for a specific event. You can also use the Events API to retrieve the number of events.

Retrieving the number of events

Syntax

```
GET {baseAPIaddress}/v2/Accounts/{accountID}/Events?$count
```

Example

```
GET https://api.wildapricot.org/v2/Accounts/58293/Events?$count
```

The number of events will be returned in a **Count** field.

Retrieving information for all events

Syntax

```
GET {baseAPIaddress}/v2/Accounts/{accountID}/Events
```

Example

```
GET https://api.wildapricot.org/v2/Accounts/58293/Events
```

The events list request can contain the following optional query string parameters:

- includeEventDetails – if it set to true, event details will be retrieved for each event.
- idsOnly – specify without a value to retrieve only a list of event identifiers

Retrieving information for a particular event

Syntax

```
GET {baseAPIaddress}/v2/Accounts/{accountID}/Events/{eventID}
```

Example

```
GET https://api.wildapricot.org/v2/Accounts/58293/Events/11769
```

Retrieving specific events

You can retrieve information for specific events by specifying a list of events IDs. Only events with the specified IDs will be retrieved.

Syntax

```
GET {baseAPIaddress}/v2/Accounts/{accountID}/Events?IDs={eventIDs}
```

Example

```
GET https://api.wildapricot.org/v2/Accounts/58293/Events?IDs=1,2,7,9
```

Retrieving event tags

You can retrieve a list of event tags currently in use.

Syntax

```
GET {baseAPIaddress}/v2/Accounts/{accountID}/Events/Tags
```

Example

```
GET https://api.wildapricot.org/v2/Accounts/58293/Events/Tags
```

The result will be an array (e.g. ["tag1", "tag2", "tag3"])

Parameters

The following parameters are used within the Events API call:

Variable	Description
{baseAPIaddress}	The base address of the API. For more information, see API access options .
{accountID}	The account identifier that appears on the Account and billing screen and is returned by the Accounts API call.
{eventID}	The unique identifier of an event. Event IDs are returned by the Events API call.

> ⚠ Each API call must include an authentication information that verifies your account and prevents others from accessing your data. For more information, see Authenticating API access from a 3rd-party server or application or Authenticating API access from a Wild Apricot site page.

Response fields

When retrieving information for one or more event, the Events API call retrieves the following information for each event.

Field	Description
StartDate	The time and date the event is scheduled to begin.
EndDate	The date the event ends.
StartTimeSpecified	Indicates whether the start time was specified.
EndTimeSpecified	Indicates whether the end time was specified.
Location	The location of the event.
RegistrationEnabled	Indicates whether registration has been enabled for this event.
HasEnabledRegistrationTypes	Indicates whether any registration types have been enabled for this event.

RegistrationsLimit	The limit on the number of registrations.
PendingRegistrationsCount	The number of pending registrations.
ConfirmedRegistrationsCount	The number of confirmed registrations
CheckedInAttendeesNumber	The number checked-in attendees.
Tags	Any tags – labels used to categorize events – assigned to the event.
AccessLevel	The access level for this event. Possible values: Public, AdminOnly, Restricted.
ID	The unique identifier of the event.
URL	The address of the API call for this event.
Name	The name assigned to the event.

When retrieving information for a specific event, the Events API also displays the following information, grouped under a **Details** field:

Field	**Description**
DescriptionHtml	The HTML of the event description.
PaymentInstructions	The payment instructions entered for this event.
TimeZone	The time zone for the event, including the zone ID, name, and offset.

RegistrationTypes	The registration types for this event. For each registration type, the following information is returned. <table><tr><th>Field</th><th>Description</th></tr><tr><td>Id</td><td>The unique identifier for this registration type.</td></tr><tr><td>Url</td><td>The URL for this registration type.</td></tr><tr><td>EventId</td><td>The unique identifier of the event to which this registration type belongs.</td></tr><tr><td>Name</td><td>The name assigned to the registration type.</td></tr><tr><td>IsEnabled</td><td>Indicates whether registration has been enabled for this registration type.</td></tr><tr><td>Description</td><td>The description assigned to the registration type.</td></tr><tr><td>BasePrice</td><td>The base price for the registration type.</td></tr><tr><td>GuestPrice</td><td>The registration price for guest registrations.</td></tr><tr><td>UseTaxScopeSettings</td><td>Indicates whether tax scope settings are being applied to this event.</td></tr><tr><td>AllowGuestRegistration</td><td>Indicates whether guest registrations have been enabled.</td></tr><tr><td>Availability</td><td>Indicates whether access to this event has been restricted. The possible values are Everyone, MembersOnly, and CodeRequired.</td></tr><tr><td>RegistrationCode</td><td>The registration code for this event.</td></tr><tr><td>AvailableForMembershipLevels</td><td>The membership levels to which registration is limited.</td></tr><tr><td>AvailableFrom</td><td>The first date on which this membership level is available.</td></tr><tr><td>AvailableThrough</td><td>The final date on which this membership level is available.</td></tr><tr><td>MaximumRegistrantsCount</td><td>Maximum number of registrants for this registration type.</td></tr><tr><td>CurrentRegistrantsCount</td><td>Current number of registrants for this registration type</td></tr></table>

EventRegistrationFields	For each registration field, the following information is returned.

Field	Description
Kind	Indicates the type of field. Possible values are Common, Custom.
IsRequired	Indicates whether this is a required field that must be completed in order to register for this event.
AdminOnly	Indicates whether the field is accessible to administrators only.
IsSystem	Indicates whether the field is a system field.
Description	The field description (for system fields only).
Order	The position of the field within the field list.
FieldName	The name assigned to the field.

Type	The field type. Possible values and the corresponding field types as they appear in Wild Apricot are: **Value** / **Field type** Boolean – Rules and terms, various system fields Choice – Radio buttons, dropdown, radio buttons with extra charge DateTime – Date MultipleChoice – Multiple choice, multiple choice with extra charge CalculatedExtraCharge – Extra charge calculation Number – Various system fields String – Text, multiline text
AllowedValues	For multi-option fields – those with a field **Type** of *Choice* (radio buttons, dropdown, radio buttons with extra charge) or *MultipleChoice* (multiple choice, multiple choice with extra charge) – the ID and label of each individual option is returned.

Value	Field type
Boolean	Rules and terms, various system fields
Choice	Radio buttons, dropdown, radio buttons with extra charge
DateTime	Date
MultipleChoice	Multiple choice, multiple choice with extra charge
CalculatedExtraCharge	Extra charge calculation
Number	Various system fields
String	Text, multiline text

	ExtraCharge	For extra charge calculation fields, the following information is displayed: **Field** / **Description** MultiplierType: Indicates whether the multiplier is the unit cost (ItemPrice) or percentage (Percentage). Multiplier: The decimal value of the multiplier. MinAmount: The minimum number of items for ItemPrice multiplier types MaxAmount: The maximum number of items for ItemPrice multiplier types MinCharge: The minimum resulting charge for Percentage multiplier types MaxCharge: The maximum resulting charge for Percentage multiplier types
	SystemName	The internal system name used to refer to this field (system fields only).

<table>
<tr><td>TotalPaid</td><td>The total sum paid for all registrations for this event.</td></tr>
<tr><td>TotalDue</td><td>The total sum due but not yet paid for registrations for this event.</td></tr>
<tr><td>AccessControl</td><td>Indicates who can view this event either on an event calendar or via a direct link. Depend on the event's access level, the following fields may be returned.
<table>
<tr><th>Field</th><th>Description</th></tr>
<tr><td>AccessLevel</td><td>Possible values: Public, AdminOnly, Restricted</td></tr>
<tr><td>AvailableForAnyLevel</td><td>If AccessLevel is set to Restricted, indicates whether access is enabled for all membership levels.</td></tr>
<tr><td>AvailableForLevels</td><td>If AvailableForAnyLevel is false, lists the ID and URL of membership levels that have been granted access.</td></tr>
<tr><td>AvailableForAnyGroup</td><td>If AccessLevel is set to Restricted, indicates whether access is enabled for all member groups.</td></tr>
<tr><td>AvailableForGroups</td><td>If AvailableForAnyGroup is false, lists the ID and URL of member groups that have been granted access.</td></tr>
</table></td></tr>
<tr><td>GuestRegistrationSettings</td><td>Grouped under here are the following fields:
<table>
<tr><th>Field</th><th>Description</th></tr>
<tr><td>Enabled</td><td>Indicates whether guest registrations are enabled.</td></tr>
<tr><td>CreateContactMode</td><td>Indicates the circumstances under which contact records are created when creating guest registrations. The possible values are:
NeverCreateContact
CreateContactForAllGuests
CreateContactForGuestsWithEmail</td></tr>
</table></td></tr>
<tr><td>MultipleRegistrationAllowed</td><td>Indicates whether visitors can register multiple times for the same event.</td></tr>
<tr><td>Organizer</td><td>The contact ID and URL of the event organizer</td></tr>
<tr><td>SendEmailCopy</td><td>Indicates whether copies of event emails are sent to the event organizer.</td></tr>
<tr><td>PaymentMethod</td><td>Indicates the payment method for this event. Possible values: Undefined, OnlineAndOffline, OfflineOnly, OnlineOnly</td></tr>
</table>

RegistrationConfirmationExtraInfo	Extra information to be included in the registration confirmation email.
RegistrationMessage	Information to be displayed above the Register button on the event details screen.
WaitlistBehaviour	Indicates the waitlist behavior. Possible values: Disabled, Undefined, RequestNameAndEmail, RequestContactInformation, RequestRegistrationInformation
AttendeesDisplaySettings	Indicates whether and how a list of event registrants appears for the event on the event calendar and in the event details. **Field** / **Description** VisibleTo: Indicates who can see the list of event registrants. Possible values: Public, Members, Nobody ShowPendingAttendees: Indicates whether pending registrations are included in the registrants list.
Sessions	For each session in a multi-session event, the following fields are returned: **Field** / **Description** ID: The event session ID. Title: The title of the event session. StartDate: The starting date of the event session. EndDate: The end date of the event session.

Sample JSON response

```
{
  "Events": [
    {
      "StartDate": "2015-09-10T20:00:00-04:00",
      "EndDate": "2015-09-10T20:00:00-04:00",
      "Location": "Downtown Sheraton",
      "RegistrationEnabled": true,
      "RegistrationsLimit": null,
      "PendingRegistrationsCount": 0,
      "ConfirmedRegistrationsCount": 0,
      "CheckedInAttendeesNumber": 0,
      "Tags": [
        "agm"
      ],
      "Id": 11769,
      "Url": "http://api.wildapricot.org/v2/accounts/42353/Events/11769",
      "Name": "Annual General Meeting"
    },
    {
      "StartDate": "2015-04-05T20:00:00-03:00",
      "EndDate": "2015-04-05T20:00:00-03:00",
      "Location": "Trump Tower",
      "RegistrationEnabled": true,
      "RegistrationsLimit": null,
      "PendingRegistrationsCount": 0,
      "ConfirmedRegistrationsCount": 0,
      "CheckedInAttendeesNumber": 0,
      "Tags": [
        "social"
      ],
      "Id": 11770,
      "Url": "http://api.wildapricot.org/v2/accounts/42353/Events/11770",
      "Name": "Spring gala"
    },
    {
      "StartDate": "2015-06-23T20:00:00-04:00",
      "EndDate": "2015-06-23T20:00:00-04:00",
      "Location": "West End Y",
      "RegistrationEnabled": true,
      "RegistrationsLimit": null,
      "PendingRegistrationsCount": 0,
      "ConfirmedRegistrationsCount": 0,
      "CheckedInAttendeesNumber": 0,
      "Tags": [
        "training"
      ],
      "Id": 11771,
      "Url": "http://api.wildapricot.org/v2/accounts/42353/Events/11771",
      "Name": "Volunteer training session"
    }
  ]
}
```


Sample XML response


```
<ApiResponse xmlns:i="http://www.w3.org/2001/XMLSchema-instance"
```

```
xmlns:d1p1="http://schemas.datacontract.org/2004/07/Bonasource.MembershipFS.PublicAP
I.Model.V2.Events" i:type="d1p1:EventsListResult"
xmlns="http://api.wildapricot.org">
  <d1p1:Events>
    <d1p1:Event>
      <Id>11769</Id>
      <Url>http://api.wildapricot.org/v2/accounts/42353/Events/11769</Url>
      <Name>Annual General Meeting</Name>
      <d1p1:CheckedInAttendeesNumber>5</d1p1:CheckedInAttendeesNumber>
      <d1p1:ConfirmedRegistrationsCount>4</d1p1:ConfirmedRegistrationsCount>
      <d1p1:Details i:nil="true" />
      <d1p1:EndDate xmlns:d4p1="http://schemas.datacontract.org/2004/07/System">
        <d4p1:DateTime>2015-09-11T00:00:00Z</d4p1:DateTime>
        <d4p1:OffsetMinutes>-240</d4p1:OffsetMinutes>
      </d1p1:EndDate>
      <d1p1:Location>Downtown Sheraton</d1p1:Location>
      <d1p1:PendingRegistrationsCount>6</d1p1:PendingRegistrationsCount>
      <d1p1:RegistrationEnabled>true</d1p1:RegistrationEnabled>
      <d1p1:RegistrationsLimit i:nil="true" />
      <d1p1:StartDate xmlns:d4p1="http://schemas.datacontract.org/2004/07/System">
        <d4p1:DateTime>2015-09-11T00:00:00Z</d4p1:DateTime>
        <d4p1:OffsetMinutes>-240</d4p1:OffsetMinutes>
      </d1p1:StartDate>
      <d1p1:Tags
xmlns:d4p1="http://schemas.microsoft.com/2003/10/Serialization/Arrays">
        <d4p1:string>agm</d4p1:string>
      </d1p1:Tags>
    </d1p1:Event>
    <d1p1:Event>
      <Id>11770</Id>
      <Url>http://api.wildapricot.org/v2/accounts/42353/Events/11770</Url>
      <Name>Spring gala</Name>
      <d1p1:CheckedInAttendeesNumber>0</d1p1:CheckedInAttendeesNumber>
      <d1p1:ConfirmedRegistrationsCount>1</d1p1:ConfirmedRegistrationsCount>
      <d1p1:Details i:nil="true" />
      <d1p1:EndDate xmlns:d4p1="http://schemas.datacontract.org/2004/07/System">
        <d4p1:DateTime>2015-04-05T23:00:00Z</d4p1:DateTime>
        <d4p1:OffsetMinutes>-180</d4p1:OffsetMinutes>
      </d1p1:EndDate>
      <d1p1:Location>Trump Tower</d1p1:Location>
      <d1p1:PendingRegistrationsCount>0</d1p1:PendingRegistrationsCount>
      <d1p1:RegistrationEnabled>true</d1p1:RegistrationEnabled>
      <d1p1:RegistrationsLimit i:nil="true" />
      <d1p1:StartDate xmlns:d4p1="http://schemas.datacontract.org/2004/07/System">
        <d4p1:DateTime>2015-04-05T23:00:00Z</d4p1:DateTime>
        <d4p1:OffsetMinutes>-180</d4p1:OffsetMinutes>
      </d1p1:StartDate>
      <d1p1:Tags
xmlns:d4p1="http://schemas.microsoft.com/2003/10/Serialization/Arrays">
        <d4p1:string>social</d4p1:string>
      </d1p1:Tags>
    </d1p1:Event>
    <d1p1:Event>
      <Id>11771</Id>
      <Url>http://api.wildapricot.org/v2/accounts/42353/Events/11771</Url>
      <Name>Volunteer training session</Name>
      <d1p1:CheckedInAttendeesNumber>0</d1p1:CheckedInAttendeesNumber>
      <d1p1:ConfirmedRegistrationsCount>0</d1p1:ConfirmedRegistrationsCount>
      <d1p1:Details i:nil="true" />
```

```
      <d1p1:EndDate xmlns:d4p1="http://schemas.datacontract.org/2004/07/System">
        <d4p1:DateTime>2015-06-24T00:00:00Z</d4p1:DateTime>
        <d4p1:OffsetMinutes>-240</d4p1:OffsetMinutes>
      </d1p1:EndDate>
      <d1p1:Location>West End Y</d1p1:Location>
      <d1p1:PendingRegistrationsCount>0</d1p1:PendingRegistrationsCount>
      <d1p1:RegistrationEnabled>true</d1p1:RegistrationEnabled>
      <d1p1:RegistrationsLimit i:nil="true" />
      <d1p1:StartDate xmlns:d4p1="http://schemas.datacontract.org/2004/07/System">
        <d4p1:DateTime>2015-06-24T00:00:00Z</d4p1:DateTime>
        <d4p1:OffsetMinutes>-240</d4p1:OffsetMinutes>
      </d1p1:StartDate>
      <d1p1:Tags
xmlns:d4p1="http://schemas.microsoft.com/2003/10/Serialization/Arrays">
        <d4p1:string>training</d4p1:string>
      </d1p1:Tags>
    </d1p1:Event>
  </d1p1:Events>
</ApiResponse>
```


Filtering the results

You can filter the results of the Events API call so that only those events that match the filter criteria will be included. For example, you might want to retrieve information only about upcoming events, or events between certain dates.

Within your filter criteria, you can use relational operators to include ranges of events, and use logical operators to combine multiple critieria.

$filter syntax

```
GET
https://api.wildapricot.org/{version}/Accounts/{accountID}/Events?$filter={filterCriteria}
```

where *{filterCriteria}* is the criteria to be used to filter the search results.

Example:

```
GET https://api.wildapricot.org/v2/Accounts/58293/Events?$filter=StartDate gt
2015-01-15 AND StartDate lt 2015-06-15
```

In this example, only events between January 15th, 2015 and June 15th, 2015 will be included in the results.

Filter fields

You can filter events using the following fields:

Field	Description	Supported operators
ID	A list of event IDs.	in
Name	The name of the event.	eq, substringof
IsUpcoming	Indicates whether the event has yet to take place.	eq
Tags	The labels used to categorize events.	in

StartDate	The start date of the event (using the *yyyy-mm-dd* date format)	eq, gt, ge, lt, le
EndDate	The end date of the event (using the *yyyy-mm-dd* date format)	eq, gt, ge, lt, le
RegistrationEnabled	Indicates whether registration has been enabled for the event.	eq
TextIndex	Returns events that contain the specified string within the event title, description, location, start date or event tag	substringof

Relational operators

You can use the following relational operators within your search criteria.

Operator	Description	Fields	Example
eq	Equal to	Name, IsUpcoming, StartDate, EndDate, RegistrationEnabled	$filter=RegistrationEnabled eq true
gt	Greater than	StartDate, EndDate	$filter=StartDate gt 2015-01-15
ge	Great than or equal to	StartDate, EndDate	$filter=EndtDate ge 2015-01-15
lt	Less than	StartDate, EndDate	$filter=StartDate lt 2015-06-15
le	Less than or equal to	StartDate, EndDate	$filter=End tDate le 2015-01-15
in	In list of values	Tags	$filter=Tags in [social, training]
substringof	Field includes specified value using the following format: substringof('field', 'value')	Name, TextIndex	$filter=substringof('Name', 'Annual')

Field names that include spaces or special characters (such as ? < &) must be enclosed within single quotation marks.

Logical operators

You can use logical operators – AND and OR – to group multiple search criteria, and control whether either or both criteria must satisfied.

In the following example...

```
$filter=RegistrationEnabled eq true AND StartDate gt 2015-01-15
```

...events must have registration enabled and must be taking place after January 15, 2015 to be included in the results.

In this example...

```
$filter=substringof('Name', 'training') eq true OR $filter=Tags in [training]
```

...events will included in the search results if they have the word "training" in their name or their tags.

You can use brackets to control *precedence* – the order in which multiple criteria are evaluated within your search criteria. Normally, criteria joined by an AND operator are evaluated ahead of criteria joined by an OR operator. However, any criteria surrounded by brackets will be given priority and evaluated ahead of any other criteria.

In the following example....

```
$filter=A and B or C
```

...events would have to satisfy both the A and B criteria – or satisfy the C criteria alone – to be included in the results. If, however, you place brackets as shown here...

```
$filter=A and (B or C)
```

...then events would have to satisfy either the B or C criteria, as well as the A criteria.

Sorting the results

Using the $sort parameter, you can control the order in which the results of the Events API are sorted.

Syntax

```
GET
https://api.wildapricot.org/{version}/Accounts/{accountID}/Events?$sort={sortCriteri
a}
```

where *{sortCriteria}* is one of the following:

Criteria	Description
StartDate asc	Sorted by event start date, in ascending order
StartDate desc	Sorted by event start date, in descending order
StartSession asc	Sorted by first session date, in ascending order

Example:

```
GET https://api.wildapricot.org/v2/Accounts/58293/Events?$sort=StartDate asc
```

Paging

Using the **$skip** and **$top** parameters, you can retrieve event records in sets or pages. You use the $top parameter to specify the maximum number of records to be returned, and the $skip parameter to specify the number of records to skip. The $skip parameter is incremented each call to return the next set or page of records.

Example

You want to retrieve records for the 50 events for which registration has been enabled, using an application that can only process 20 records at a time. Using the following calls, the application retrieves the first set of 20 records, then a second set of 20, and finally, the remaining 10 records.

```
https://api.wildapricot.org/v2/Accounts/58293/Events?$filter=RegistrationEnabled eq
true&$skip=0&$top=20
https://api.wildapricot.org/v2/Accounts/58293/Events?$filter=RegistrationEnabled eq
true&$skip=20&$top=20
https://api.wildapricot.org/v2/Accounts/58293/Events?$filter=RegistrationEnabled eq
true&$skip=40&$top=20
```

In this example, the $top specifies the maximum number of records to retrieve (20), and the $skip parameter is incremented from 0 to 20 to 40 to skip the records retrieved by the previous call(s).

Updating event details

You can update event details for an existing event using an Events API call.

Syntax

```
PUT {baseAPIaddress}/v2/Accounts/{accountID}/Events/{eventID}
{
  "Id": eventID,
  "{eventField}": {eventFieldValue},
  "{eventField}": {eventFieldValue},
  ...
}
```

where *eventField* is a field returned by the Events API call.

- The event ID must be specified and must match the event ID in the URL.
- If you update the **RegistrationsLimit** value, you have to provide a value with each future update, or else it will be reset to its default value of *null*.
- Read-only fields: HasEnabledRegistrationTypes, PendingRegistrationsCount, ConfirmedRegistrationsCount, CheckedInAttendeesNumber, AccessLevel

Example

```
PUT https://api.wildapricot.org/v2/Accounts/58293/Events/51369
{
    "Id":51369,
    "StartDate": "2017-11-15T00:00:00-08:00",
    "EndDate": "2017-11-17T00:00:00-08:00",
    "Sessions": [
    {
        "StartDate": "2017-11-15T00:00:00-08:00",
        "EndDate": "2017-11-17T00:00:00-08:00",
        "StartTimeSpecified": false,
        "EndDateSpecified": false
    }]
}
```

An HTTP 400 error will be returned if the event ID is invalid or doesn't match the event ID in the URL. For more information, see API V2 status codes .

Creating a new event

You can use an Events API call to create a new event.

Syntax

```
POST https://api.wildapricot.org/{version}/Accounts/{accountID}/Events/
{
  "eventField": eventFieldValue,
  "eventField": eventFieldValue,
 ...
}
```

where *eventField* is a field returned by the Events API call.

Required fields: StartDate, Name.

Read-only fields: HasEnabledRegistrationTypes, PendingRegistrationsCount, ConfirmedRegistrationsCount, CheckedInAttendeesNumber, AccessLevel

Example

```
POST https://api.wildapricot.org/{version}/Accounts/{accountID}/Events/
{
  "StartDate": "2017-07-05T10:00:00+03:00",
  "EndDate": "2017-07-11T18:00:00+03:00",
  "Location": "Boston Hilton",
  "RegistrationEnabled": true,
  "RegistrationsLimit": 100,
  "StartTimeSpecified": false,
  "EndTimeSpecified": false,
  "Name": "Annual General Meeting",
  "Tags": [
    "meeting",
    "agm"
  ],
  "Details": {
    "DescriptionHtml": "Join us at our annual general meeting",
    "PaymentInstructions": "Please pay online",
    "AccessControl": {
      "AccessLevel": "Public"
    },
    "GuestRegistrationSettings": {
      "CreateContactMode": "CreateContactForAllGuests"
    },
    "Organizer": null,
    "PaymentMethod": "OnlineOnly",
    "RegistrationConfirmationExtraInfo": "additional info for confirmation email",
    "RegistrationMessage": "additional info for registration wizard",
    "SendEmailCopy": true,
    "WaitListBehaviour": "RequestNameAndEmail"
  },
  "Sessions": [
    {
      "StartDate": "2017-07-06T10:00:00+03:00",
      "EndDate": "2017-07-06T18:00:00+03:00",
      "StartTimeSpecified": false,
      "EndTimeSpecified": false
    },
    {
      "StartDate": "2017-07-07T10:00:00+03:00",
      "EndDate": "2017-07-07T18:00:00+03:00",
      "StartTimeSpecified": false,
      "EndTimeSpecified": false
    },
    {
      "StartDate": "2017-07-08T10:00:00+03:00",
      "EndDate": "2017-07-08T18:00:00+03:00",
      "StartTimeSpecified": false,
      "EndTimeSpecified": false
    }
  ]
}
```

If successful, the call returns the new event ID. If unsuccessful, it returns HTTP 400.

Deleting an event

You can use an Events API call to delete an event.

Syntax

```
DELETE {baseAPIaddress}/v2/Accounts/{accountID}/Events/{eventID}
```

Example

```
DELETE https://api.wildapricot.org/v2/Accounts/58293/Events/11769
```

If the call is successful, it returns HTTP 200 Success. If it is unsuccessful, it returns HTTP 400 bad request.

On this page:

See also:

- API V2 authentication
- API V2 calls
- EventRegistrations API V2 call

Invoices API V2 call

Invoices API V2 call

Wild Apricot's API is intended for use by developers with technical expertise. If you need assistance, we provide support via email or through our Developers forum.

You can use the Invoices API call to retrieve information on a particular invoice, or for multiple invoices, filtered by date, contact, event, or unpaid invoices. You can also create, edit, void, or delete an invoice.

Retrieving information for a particular invoice

Syntax

```
GET {baseAPIaddress}/{version}/Accounts/[accountID]/Invoices/[invoiceID]
```

Example:

```
GET https://api.wildapricot.org/v2/Accounts/58293/Invoices/206311
```

Retrieving multiple invoices

You can use the Invoices API call to retrieve multiple invoices. You must include filter criteria to narrow the results. For details, see Filtering the results (below).

The invoice IDs will be listed by document date in descending order.

Syntax

```
GET {baseAPIaddress}/{version}/Accounts/{accountID}/Invoices/?{filterCriteria}
```

Example:

```
GET
https://api.wildapricot.org/v2.1/Accounts/58293/Invoices?contactId=725191&StartDate=
2016-11-20
```

⚠ If you want to retrieve voided invoices as well as active invoices, specify v2.1 as the API version.

Parameters

The following parameters are used within the Invoices API call:

Variable	Description
baseAPIaddress	The base address of the API. For more information, see API access options .
version	The version number of the API. Versions 2 and 2.1 are supported for this call. To retrieve a list of API versions, use the base API call.
accountID	The account identifier that appears on the Account and billing screen and is returned by the Accounts API call.
invoiceID	The unique identifier for an invoice. Invoices IDs are returned by the Invoices API call.
filterCriteria	The criteria used to filter the search results. This is a required parameter. For details, see Filtering the results (below).

⚠ Each API call must include an authentication information that verifies your account and prevents others from accessing your data. For more information, see Authenticating API access from a 3rd-party server or application or Authenticating API access from a Wild Apricot site page.

Filtering the results

When retrieving information for multiple invoices, you must include filter criteria. You can filter the results by specifying a contact or event, by specifying a start and/or end date, and by specifying a set of invoice ids. You can also filter the list to retrieve only unpaid invoices. You can combine multiple filter criteria to further narrow the results.

Specifying a contact or event

You can filter the invoices by specifying a particular contact and/or event.
Syntax

```
GET
{baseAPIaddress}/{version}/Accounts/{accountID}/Invoices/?contactId={contactID}&even
tId={eventID}
```

Example:

```
GET
https://api.wildapricot.org/v2/Accounts/58293/Invoices/?contactId=725191&eventId=117
69
```

Specifying a start or end document date

You can filter the invoices by specifying a start date and/or an end date (using the DocumentDate field).
Syntax

```
GET
{baseAPIaddress}/{version}/Accounts/{accountID}/Invoices/?StartDate={date}&EndDate={
date}
```

where *date* is the start or end date of the range (using the *yyyy-mm-dd* date format).
Example:

```
GET
https://api.wildapricot.org/v2/Accounts/58293/Invoices/?StartDate=2016-11-01&EndDate
=2016-11-30
```

Specifying a set of invoice IDs

You can filter the invoices by specifying a set of invoice IDs.
Syntax

```
GET
{baseAPIaddress}/{version}/Accounts/{accountID}/Invoices/?ids={id1},{id2},{id3}...
```

where *id* is the unique identifier of an invoice.
Example:

```
GET https://api.wildapricot.org/v2/Accounts/58293/Invoices/?ids=206311,206312
```

Retrieving only unpaid invoices

You can filter the invoices to retrieve only invoices without settled payments.

Syntax

```
GET {baseAPIaddress}/{version}/Accounts/{accountID}/Invoices/?UnpaidOnly
```

where *id* is the unique identifier of an invoice.
Example:

```
GET https://api.wildapricot.org/v2/Accounts/58293/Invoices/?UnpaidOnly
```

Retrieving just invoice IDs

You can retrieve just the invoice IDs that match the filter criteria by including the **idsOnly** parameter. This parameter is only available when you specify v2.1 as the API version. The invoice IDs will be listed by document date in descending order.
Example

```
GET
https://api.wildapricot.org/v2/Accounts/58293/Invoices/?eventId=11769&idsOnly=true
```

Paging

Using the **$skip** and **$top** parameters, you can retrieve records in sets or pages. You use the $top parameter to specify the maximum number of records to be returned, and the $skip parameter to specify the number of records to skip. The $skip parameter is incremented each call to return the next set or page of records.

Example

You want to retrieve 50 records using an application that can only process 20 records at a time. Using the following calls, the application retrieves the first set of 20 records, then a second set of 20, and finally, the remaining 10 records.

```
https://api.wildapricot.org/v2/Accounts/58293/Invoices?eventId=11769&$skip=0&$top=20
https://api.wildapricot.org/v2/Accounts/58293/Invoices?eventId=11769&$skip=20&$top=2
0
https://api.wildapricot.org/v2/Accounts/58293/Invoices?eventId=11769&$skip=40&$top=2
0
```

In this example, the $top specifies the maximum number of records to retrieve (20), and the $skip parameter is incremented from 0 to 20 to 40 to skip the recordsretrieved by the previous call(s).

Response fields

For each invoice, the Invoices API call retrieves the following information.

Field	Description
DocumentNumber	The invoice number.
IsPaid	Indicates whether the invoice is fully paid.
PaidAmount	The sum paid towards the invoice.

OrderType	The invoice type. Possible values: • ChangeBillingPlan • ChangeBillingInfo • Donation • EventRegistration • MembershipApplication • MembershipLevelChange • MembershipRenewal • Undefined
OrderDetails	Details of the individual items appearing on the invoice. This is a required array when adding an invoice. Within the OrderDetails array, the fields are Value, Notes, and Taxes. Notes are required and the sum of the Value fields must be positive.
Memo	Internal notes on the invoice.
PublicMemo	Comments for the payer on the invoice.
Value	The total amount of the invoice.
DocumentDate	The date and time the invoice was created.
Contact	The contact to whom the invoice is assigned. You must specify the contact when adding an invoice.
CreatedDate	The date the invoice was created.
CreatedBy	The contact who created the invoice (if manually created).
UpdatedDate	The date the invoice was last updated.
UpdatedBy	The contact who updated the invoice.
ID	The unique identifier of the invoice.
URL	The address of the URL call for the invoice.

Sample JSON response

```
 {
  "DocumentNumber": "00004",
  "IsPaid": true,
  "PaidAmount": 84,
  "OrderType": "EventRegistration",
  "EventRegistration": {
    "Id": 13914620,
    "Url":
"http://api.wildapricot.org/v2.1/accounts/203011/EventRegistrations/13914620"
  },
  "OrderDetails": [
    {
      "Value": 84,
      "Notes": "Registration for "Spring Gala" (1 Apr 2019 7:30 PM, The Event
Venue), Member tickets",
      "Taxes": {
        "Value": 84,
        "CalculatedTax1": 4,
        "CalculatedTax2": 0,
        "NetAmount": 80,
        "RoundedAmount": 84,
        "Tax1": {
          "Name": "GST",
          "PublicId": "",
          "Rate": 5
        },
        "Tax2": null
      }
    }
  ],
  "Memo": "Payer is frequently late",
  "PublicMemo": "Please pay online",
  "Value": 84,
  "DocumentDate": "2016-11-21T00:00:00-05:00",
  "Contact": {
    "Id": 29976959,
    "Url": "http://api.wildapricot.org/v2.1/accounts/203011/Contacts/29976959"
  },
  "CreatedDate": "2016-11-21T13:24:38",
  "CreatedBy": {
    "Id": 29976949,
    "Url": "http://api.wildapricot.org/v2.1/accounts/203011/Contacts/29976949"
  },
  "UpdatedDate": "2016-11-21T13:24:56",
  "UpdatedBy": {
    "Id": 29976949,
    "Url": "http://api.wildapricot.org/v2.1/accounts/203011/Contacts/29976949"
  },
  "Id": 25291893,
  "Url": "http://api.wildapricot.org/v2.1/accounts/203011/Invoices/25291893"
}
```

Sample XML response

```
<Invoice xmlns:i="http://www.w3.org/2001/XMLSchema-instance"
xmlns="http://api.wildapricot.org">
  <Id>25291893</Id>
  <Url>http://api.wildapricot.org/v2.1/accounts/203011/Invoices/25291893</Url>
  <Contact>
    <Id>29976959</Id>
    <Url>http://api.wildapricot.org/v2.1/accounts/203011/Contacts/29976959</Url>
  </Contact>
  <CreatedBy>
    <Id>29976949</Id>
    <Url>http://api.wildapricot.org/v2.1/accounts/203011/Contacts/29976949</Url>
  </CreatedBy>
  <CreatedDate>2016-11-21T13:24:38</CreatedDate>
  <DocumentDate xmlns:d2p1="http://schemas.datacontract.org/2004/07/System">
    <d2p1:DateTime>2016-11-21T05:00:00Z</d2p1:DateTime>
    <d2p1:OffsetMinutes>-300</d2p1:OffsetMinutes>
  </DocumentDate>
  <UpdatedBy>
    <Id>29976949</Id>
    <Url>http://api.wildapricot.org/v2.1/accounts/203011/Contacts/29976949</Url>
  </UpdatedBy>
  <UpdatedDate>2016-11-21T13:24:56</UpdatedDate>
  <Value>84.0000</Value>
  <DocumentNumber>00004</DocumentNumber>
  <EventRegistration>
    <Id>13914620</Id>

<Url>http://api.wildapricot.org/v2.1/accounts/203011/EventRegistrations/13914620</Ur
l>
  </EventRegistration>
  <IsPaid>true</IsPaid>
  <Memo>Payer is frequently late</Memo>
  <OrderDetails>
    <OrderDetail>
      <Notes>Registration for "Spring Gala" (1 Apr 2019 7:30 PM, The Event Venue),
Member tickets</Notes>
      <Taxes>
        <Amount>84.0000000</Amount>
        <CalculatedTax1>4.0000000</CalculatedTax1>
        <CalculatedTax2>0</CalculatedTax2>
        <NetAmount>80.0000</NetAmount>
        <RoundedAmount>84.00</RoundedAmount>
        <Tax1>
          <Name>GST</Name>
          <PublicId>
          </PublicId>
          <Rate>5.000</Rate>
        </Tax1>
        <Tax2 i:nil="true" />
      </Taxes>
      <Value>84.0000</Value>
    </OrderDetail>
  </OrderDetails>
  <OrderType>EventRegistration</OrderType>
  <PaidAmount>84.0000</PaidAmount>
  <PublicMemo>Please pay online</PublicMemo>
  <VoidedDate i:nil="true" />
</Invoice>
```

Creating a new invoice

You can use the Invoices API call to create a new invoice.

Syntax

```
POST {baseAPIaddress}/{version}/Accounts/{accountID}/Invoices
{
  "{invoiceField}": {invoiceFieldValue},
  "{invoiceField}": {invoiceFieldValue},
 ...
}
```

where *invoiceField* is a field returned by the Invoices API call.

Example

```
POST https://api.wildapricot.org/v2/Accounts/58293/Invoices
{
  "OrderDetails": [
    {
      "Value": 25,
      "Quantity": 1,
      "Notes": "Membership level change. New level: Gold"
    }
  ],
  "Contact": {
    "Id": 29976959
  },
  "CreatedDate": "2016-11-21T13:24:38",
  "CreatedBy": {
    "Id": 29976949
  }
}
```

> ⚠ The OrderDetails array, and the Contact ID are required when adding an invoice. Within the OrderDetails array, the fields are Value, Notes, and Taxes. Notes are required and the sum of the Value fields must be positive.

If successful, the call will return the new invoice ID.

Updating an invoice

You can update an existing invoice using an Invoices API call.

Syntax

```
PUT {baseAPIaddress}/{version}/Accounts/{accountID}/Invoices/{invoiceID}
{
  "Id": invoiceID,
  "{invoiceField}": {invoiceFieldValue},
  "{invoiceField}": {invoiceFieldValue},
 ...
}
```

where *invoiceField* is a field returned by the Invoices API call.

> ⚠ The invoice ID must be specified both as a field and within the requesting URL. All other fields are optional.

Example

```
PUT https://api.wildapricot.org/v2/Accounts/58293/Invoices/206311
{
  "OrderDetails": [
    {
      "Value": 25,
      "Notes": "Membership level change. New level: Gold"
    }
  ],
  "CreatedDate": "2016-11-21T13:24:38",
  "CreatedBy": {
    "Id": 29976949
  }
}
```

If successful, the call returns an HTTP status code 200 without any data in the response body.

Voiding an invoice

You can perform a remote procedure call to void an invoice.

Syntax

```
POST {baseAPIaddress}/{version}/rpc/{accountID}/VoidInvoice?invoiceId={invoice_id}
```

where *invoiceID* is the unique identifier of an invoice returned by the Invoices API call.

Example

```
POST https://api.wildapricot.org/v2/rpc/58293/VoidInvoice?invoiceId=206311
```

Deleting an invoice

You can use an Invoices API call to delete an existing invoice.

Syntax

```
DELETE {baseAPIaddress}/{version}/Accounts/{accountID}/Invoices/{invoiceID}
```

where *invoiceID* is the ID of the invoice you want to delete.

Example

```
DELETE https://api.wildapricot.org/v2/Accounts/58293/Invoices/206311
```

If successful, the call returns HTTP 200 Success. If unsuccessful, returns HTTP 400 bad request.

Generating an invoice for an event registration

You can perform a remote procedure call to generate or regenerate an invoice for an event registration.

Syntax

```
POST
{baseAPIaddress}/{version}/rpc/{accountID}/GenerateInvoiceForEventRegistration?event
RegistrationId={eventRegistrationID}&updateIfExists=true/false
```

where *eventRegistrationsID* is the unique identifier of an event registration returned by the EventRegistrations API call, and *updateIfExists* is an optional parameter. If updateIfExists=true, then the invoice will be regenerated if it already exists. If updateIfExists=false and the invoice already exists, then *Bad request* will be returned.

Example

```
POST
https://api.wildapricot.org/v2/rpc/58293/GenerateInvoiceForEventRegistration?eventRe
gistrationId=112745&updateIfExists=true
```

If this call is successful, it returns the ID of the new or updated invoice.

On this page:

See also:

- API V2 authentication
- API V2 calls

MemberGroups API V2 call

MemberGroups API V2 call

> Wild Apricot's API is intended for use by developers with technical expertise. If you need assistance, we provide support via email o r through our Developers forum.

You can use the MemberGroups API call to retrieve information about member groups. You can retrieve information for all member groups, and just for a specified group.

Retrieving information for all groups

Syntax

```
GET {baseAPIaddress}/v2/Accounts/{accountID}/MemberGroups
```

Example

```
GET https://api.wildapricot.org/v2/Accounts/58293/MemberGroups
```

Retrieving information for a particular group

Syntax

```
GET {baseAPIaddress}/v2/Accounts/{accountID}/MemberGroups/{groupID}
```

Example

```
GET https://api.wildapricot.org/v2/Accounts/58293/MemberGroups/507
```

> Each API call must include an authentication information that verifies your account and prevents others from accessing your data. For more information, see Authenticating API access from a 3rd-party server or application or Authenticating API access from a Wild Apricot site page.

Parameters

The following parameters are used within the MemberGroups API call:

Variable	Description
{baseAPIaddress}	The base address of the API. For more information, see API access options.
{accountID}	The account identifier that appears on the Account and billing screen and is returned by the Accounts API call.
{groupID}	The unique identifier of a member group. Groups IDs are returned by the MemberGroups API call.

Response fields

For each member group, the MemberGroups API call retrieves the following information.

Field	Description
ContactsCount	The number of contacts in the member group.
ContactIDs	The contact IDs of contacts in the member group.
Description	The description entered for the member group.
ID	The unique identifier of the member group.
URL	The address of the API call for this group.
Name	The name assigned to the member group.

Sample JSON response


```
[
  {
    "ContactsCount": 5,
    "Description": "Members of the advisory board",
    "Id": 505,
    "Url": "http://api.wildapricot.org/v2/accounts/42353/MemberGroups/505",
    "Name": "Board members"
  },
  {
    "ContactsCount": 18,
    "Description": "Master mailing list",
    "Id": 507,
    "Url": "http://api.wildapricot.org/v2/accounts/42353/MemberGroups/507",
    "Name": "Mailing list"
  },
  {
    "ContactsCount": 3,
    "Description": "Members of the volunteer committee",
    "Id": 506,
    "Url": "http://api.wildapricot.org/v2/accounts/42353/MemberGroups/506",
    "Name": "Volunteer committee"
  }
]
```


Sample XML response

```
<ArrayOfMembershipGroup xmlns:i="http://www.w3.org/2001/XMLSchema-instance"
xmlns="http://schemas.datacontract.org/2004/07/Bonasource.MembershipFS.PublicAPI.Mod
el.V2.Contacts">
  <MembershipGroup>
    <Id xmlns="http://api.wildapricot.org">505</Id>
    <Url
xmlns="http://api.wildapricot.org">http://api.wildapricot.org/v2/accounts/42353/Memb
erGroups/505</Url>
    <Name xmlns="http://api.wildapricot.org">Board members</Name>
    <ContactIds
xmlns:d3p1="http://schemas.microsoft.com/2003/10/Serialization/Arrays" i:nil="true"
/>
    <ContactsCount>5</ContactsCount>
    <Description>Members of the advisory board</Description>
  </MembershipGroup>
  <MembershipGroup>
    <Id xmlns="http://api.wildapricot.org">507</Id>
    <Url
xmlns="http://api.wildapricot.org">http://api.wildapricot.org/v2/accounts/42353/Memb
erGroups/507</Url>
    <Name xmlns="http://api.wildapricot.org">Mailing list</Name>
    <ContactIds
xmlns:d3p1="http://schemas.microsoft.com/2003/10/Serialization/Arrays" i:nil="true"
/>
    <ContactsCount>18</ContactsCount>
    <Description>Master mailing list</Description>
  </MembershipGroup>
  <MembershipGroup>
    <Id xmlns="http://api.wildapricot.org">506</Id>
    <Url
xmlns="http://api.wildapricot.org">http://api.wildapricot.org/v2/accounts/42353/Memb
erGroups/506</Url>
    <Name xmlns="http://api.wildapricot.org">Volunteer committee</Name>
    <ContactIds
xmlns:d3p1="http://schemas.microsoft.com/2003/10/Serialization/Arrays" i:nil="true"
/>
    <ContactsCount>3</ContactsCount>
    <Description>Members of the volunteer committee</Description>
  </MembershipGroup>
</ArrayOfMembershipGroup>
```


On this page:

See also:

- API V2 authentication

- API V2 calls
- Member groups

MembershipLevels API V2 call

Wild Apricot's API is intended for use by developers with technical expertise. If you need assistance, we provide support via email o r through our Developers forum.

You can use the MembershipLevels API call to retrieve details about all your membership levels, or just one membership level in particular.

Retrieving details for all membership levels

Syntax

```
GET {baseAPIaddress}/v2/Accounts/{accountID}/MembershipLevels
```

Example

```
GET https://api.wildapricot.org/v2/Accounts/58293/MembershipLevels
```

Retrieving details for a particular membership level

Syntax

```
GET {baseAPIaddress}/v2/Accounts/{accountID}/MembershipLevels/{levelID}
```

Example

```
GET https://api.wildapricot.org/v2/Accounts/58293/MembershipLevels/257271
```

Each API call must include an authentication information that verifies your account and prevents others from accessing your data. For more information, see Authenticating API access from a 3rd-party server or application or Authenticating API access from a Wild Apricot site page.

Parameters

The following parameters are used within the MembershipLevels API call:

Variable	Description
{baseAPIaddress}	The base address of the API. For more information, see API access options.
{accountID}	The account identifier that appears on the Account and billing screen and is returned by the Accounts API call.
{levelID}	The ID of a membership level. You can retrieve a list of membership level IDs by calling the MembershipLevels API without specify a level ID.

Response fields

The MembershipLevels API call retrieves the following information about your membership levels.

<table>
<tr><th>Field</th><th>Description</th></tr>
<tr><td>Id</td><td>The identifier for the membership level.</td></tr>
<tr><td>Url</td><td>The address of the API call for this membership level.</td></tr>
<tr><td>Name</td><td>The level name as it appears on the General tab of the Membership level detail screen.</td></tr>
<tr><td>Description</td><td>The description of the level as it appears on the General tab of the Membership level detail screen.</td></tr>
<tr><td>PublicCanApply</td><td>Indicates whether the Public can apply option has been enabled for this level. Possible values are true and false.</td></tr>
<tr><td>Type</td><td>Indicates whether the membership level is an individual level or a bundle level. Possible values are Individual and Bundle.</td></tr>
<tr><td>MembershipFee</td><td>The membership fee for this level.</td></tr>
<tr><td>MemberCanChangeToLevels</td><td>Lists the membership levels that members on this level can change to.</td></tr>
<tr><td>BundleMembersLimit</td><td>For bundle membership levels, this indicates the bundle member limit. For individual membership levels, the value is 0.</td></tr>
<tr><td>RenewalPeriod</td><td>Contains fields that correspond to options that appear on the Renewal policy tab on the Membership level detail screen.
<table>
<tr><th>Field</th><th>Description</th></tr>
<tr><td>Kind</td><td>Indicates the renewal period for the membership level. Possibles values are Never , Monthly , TwiceAYear , Quarterly , and EveryNYears .</td></tr>
<tr><td>StartFromJoinDate</td><td>For renewal periods of every x number of years – where the value for Kind is EveryNYears – StartFromJoinDate indicates whether the Join date option was selected, so that renewal takes place on the join date. Possible values are true and false .</td></tr>
<tr><td>Dates</td><td>Where the value for Kind is EveryNYears and StartFromJoinDate equals false , values will appear in Month and Day fields to indicate the specified renewal date.</td></tr>
<tr><td>YearPeriod</td><td>For renewal periods of every x number of years, YearPeriod indicates the number of years between renewals.</td></tr>
</table>
</td></tr>
</table>

<table>
<tr><td>AutomaticRecurringPayments</td><td>Indicates whether automatic recurring payments have been enabled for this level. Possible values are true and false.</td></tr>
<tr><td>ApplicationReview</td><td>Contains fields that correspond to options that appear on the New applications tab on the Membership level detail screen.
<table>
<tr><th>Field</th><th>Description</th></tr>
<tr><td>AdminApprovalRequired</td><td>Indicates whether administrator approval is required before a new membership is activated. Possible values are true and false .</td></tr>
<tr><td>PrepayRequired</td><td>Indicates whether payment must be received before a new membership is activated. Possible values are true and false .</td></tr>
</table></td></tr>
</table>

Sample JSON response


```
[
  {
    "Id": 29877,
    "Url": "http://api.wildapricot.org/v2/accounts/42353/MembershipLevels/29877",
    "Name": "Bronze",
    "Description": "",
    "PublicCanApply": true,
    "Type": "Individual",
    "MembershipFee": 10,
    "RenewalPeriod": {
      "Kind": "EveryNYears",
      "StartFromJoinDate": true,
      "YearPeriod": 1
    },
    "AutomaticRecurringPayments": false,
    "ApplicationReview": {
      "AdminApprovalRequired": true,
      "PrepayRequired": true
    }
  },
  {
    "Id": 29878,
    "Url": "http://api.wildapricot.org/v2/accounts/42353/MembershipLevels/29878",
    "Name": "Silver",
    "Description": "",
    "PublicCanApply": true,
    "Type": "Individual",
    "MembershipFee": 15,
    "RenewalPeriod": {
      "Kind": "EveryNYears",
      "StartFromJoinDate": true,
      "YearPeriod": 1
    },
    "AutomaticRecurringPayments": false,
    "ApplicationReview": {
```

```
      "AdminApprovalRequired": true,
      "PrepayRequired": true
    }
  },
  {
    "Id": 29879,
    "Url": "http://api.wildapricot.org/v2/accounts/42353/MembershipLevels/29879",
    "Name": "Platinum",
    "Description": "",
    "PublicCanApply": true,
    "Type": "Individual",
    "MembershipFee": 25,
    "RenewalPeriod": {
      "Kind": "EveryNYears",
      "StartFromJoinDate": true,
      "YearPeriod": 1
    },
    "AutomaticRecurringPayments": false,
    "ApplicationReview": {
      "AdminApprovalRequired": true,
      "PrepayRequired": true
    }
  },
  {
    "Id": 29880,
    "Url": "http://api.wildapricot.org/v2/accounts/42353/MembershipLevels/29880",
    "Name": "Gold",
    "Description": "",
    "PublicCanApply": true,
    "Type": "Individual",
    "MembershipFee": 20,
    "RenewalPeriod": {
      "Kind": "EveryNYears",
      "StartFromJoinDate": true,
      "YearPeriod": 1
    },
    "AutomaticRecurringPayments": false,
    "ApplicationReview": {
      "AdminApprovalRequired": true,
      "PrepayRequired": true
    }
  },
  {
    "Id": 29881,
    "Url": "http://api.wildapricot.org/v2/accounts/42353/MembershipLevels/29881",
    "Name": "Corporate",
    "Description": "",
    "PublicCanApply": false,
    "Type": "Bundle",
    "MembershipFee": 100,
    "BundleMembersLimit": 25,
    "RenewalPeriod": {
      "Kind": "Never"
    },
    "AutomaticRecurringPayments": false,
    "ApplicationReview": {
      "AdminApprovalRequired": true,
      "PrepayRequired": true
```

```
    }
  }
]
```

Sample XML response


```
<ArrayOfMembershipLevel xmlns:i="http://www.w3.org/2001/XMLSchema-instance"
xmlns="http://api.wildapricot.org">
  <MembershipLevel>
    <ApplicationReview>
      <AdminApprovalRequired>true</AdminApprovalRequired>
      <PrepayRequired>true</PrepayRequired>
    </ApplicationReview>
    <AutomaticRecurringPayments>false</AutomaticRecurringPayments>
    <BundleMembersLimit i:nil="true" />
    <Description>
    </Description>
    <Id>29877</Id>
    <MemberCanChangeToLevels i:nil="true" />
    <MembershipFee>10.0000</MembershipFee>
    <Name>Bronze</Name>
    <PublicCanApply>true</PublicCanApply>
    <RenewalPeriod>
      <Dates i:nil="true" />
      <Kind>EveryNYears</Kind>
      <StartFromJoinDate>true</StartFromJoinDate>
      <YearPeriod>1</YearPeriod>
    </RenewalPeriod>
    <Type>Individual</Type>
    <Url>http://api.wildapricot.org/v2/accounts/42353/MembershipLevels/29877</Url>
  </MembershipLevel>
  <MembershipLevel>
    <ApplicationReview>
      <AdminApprovalRequired>true</AdminApprovalRequired>
      <PrepayRequired>true</PrepayRequired>
    </ApplicationReview>
    <AutomaticRecurringPayments>false</AutomaticRecurringPayments>
    <BundleMembersLimit i:nil="true" />
    <Description>
    </Description>
    <Id>29878</Id>
    <MemberCanChangeToLevels i:nil="true" />
    <MembershipFee>15.0000</MembershipFee>
    <Name>Silver</Name>
    <PublicCanApply>true</PublicCanApply>
    <RenewalPeriod>
      <Dates i:nil="true" />
      <Kind>EveryNYears</Kind>
      <StartFromJoinDate>true</StartFromJoinDate>
      <YearPeriod>1</YearPeriod>
    </RenewalPeriod>
    <Type>Individual</Type>
    <Url>http://api.wildapricot.org/v2/accounts/42353/MembershipLevels/29878</Url>
  </MembershipLevel>
  <MembershipLevel>
    <ApplicationReview>
```

```
      <AdminApprovalRequired>true</AdminApprovalRequired>
      <PrepayRequired>true</PrepayRequired>
    </ApplicationReview>
    <AutomaticRecurringPayments>false</AutomaticRecurringPayments>
    <BundleMembersLimit i:nil="true" />
    <Description>
    </Description>
    <Id>29879</Id>
    <MemberCanChangeToLevels i:nil="true" />
    <MembershipFee>25.0000</MembershipFee>
    <Name>Platinum</Name>
    <PublicCanApply>true</PublicCanApply>
    <RenewalPeriod>
      <Dates i:nil="true" />
      <Kind>EveryNYears</Kind>
      <StartFromJoinDate>true</StartFromJoinDate>
      <YearPeriod>1</YearPeriod>
    </RenewalPeriod>
    <Type>Individual</Type>
    <Url>http://api.wildapricot.org/v2/accounts/42353/MembershipLevels/29879</Url>
  </MembershipLevel>
  <MembershipLevel>
    <ApplicationReview>
      <AdminApprovalRequired>true</AdminApprovalRequired>
      <PrepayRequired>true</PrepayRequired>
    </ApplicationReview>
    <AutomaticRecurringPayments>false</AutomaticRecurringPayments>
    <BundleMembersLimit i:nil="true" />
    <Description>
    </Description>
    <Id>29880</Id>
    <MemberCanChangeToLevels i:nil="true" />
    <MembershipFee>20.0000</MembershipFee>
    <Name>Gold</Name>
    <PublicCanApply>true</PublicCanApply>
    <RenewalPeriod>
      <Dates i:nil="true" />
      <Kind>EveryNYears</Kind>
      <StartFromJoinDate>true</StartFromJoinDate>
      <YearPeriod>1</YearPeriod>
    </RenewalPeriod>
    <Type>Individual</Type>
    <Url>http://api.wildapricot.org/v2/accounts/42353/MembershipLevels/29880</Url>
  </MembershipLevel>
  <MembershipLevel>
    <ApplicationReview>
      <AdminApprovalRequired>true</AdminApprovalRequired>
      <PrepayRequired>true</PrepayRequired>
    </ApplicationReview>
    <AutomaticRecurringPayments>false</AutomaticRecurringPayments>
    <BundleMembersLimit>25</BundleMembersLimit>
    <Description>
    </Description>
    <Id>29881</Id>
    <MemberCanChangeToLevels i:nil="true" />
    <MembershipFee>100.0000</MembershipFee>
    <Name>Corporate</Name>
    <PublicCanApply>false</PublicCanApply>
    <RenewalPeriod>
```

```
    <Dates i:nil="true" />
    <Kind>Never</Kind>
    <StartFromJoinDate i:nil="true" />
    <YearPeriod i:nil="true" />
  </RenewalPeriod>
  <Type>Bundle</Type>
```

```
    <Url>http://api.wildapricot.org/v2/accounts/42353/MembershipLevels/29881</Url>
  </MembershipLevel>
</ArrayOfMembershipLevel>
```

On this page:

See also:

- API V2 authentication
- API V2 calls

PaymentAllocations API V2 call

PaymentAllocations API V2 call

Wild Apricot's API is intended for use by developers with technical expertise. If you need assistance, we provide support via email o r through our Developers forum.

You can use the PaymentAllocations API call to retrieve information describing how payments are allocated among invoices. A single payment, for example, might be allocated to multiple invoices, and multiple payments can be allocated to a single invoice.

Retrieving information for a particular invoice

Syntax

```
GET
{baseAPIaddress}/v2/Accounts/{accountID}/PaymentAllocations?invoiceId={invoiceID}
```

Example:

```
GET
https://api.wildapricot.org/v2/Accounts/58293/PaymentAllocations?invoiceId=206311
```

Retrieving information for a particular payment

Syntax

```
GET
{baseAPIaddress}/v2/Accounts/{accountID}/PaymentAllocations?paymentId={paymentID}
```

Example:

```
GET https://api.wildapricot.org/v2/Accounts/58293/PaymentAllocations?paymentId=49492
```

Parameters

The following parameters are used within the PaymentAllocations API call:

Variable	Description
{baseAPIaddress}	The base address of the API. For more information, see API access options.
{accountID}	The account identifier that appears on the Account and billing screen and is returned by the Accounts API call.
{invoiceID}	The unique identifier for an invoice. Invoices IDs are returned by the Invoices API call.
{paymentID}	The unique identifier for a payment. Payment IDs are returned by the Payments API call.

> Each API call must include an authentication information that verifies your account and prevents others from accessing your data. For more information, see Authenticating API access from a 3rd-party server or application or Authenticating API access from a Wild Apricot site page.

Response fields

The PaymentAllocations API call retrieves the following information for each payment allocation.

Field	Description
ID	The unique identifier of the payment allocation.
Value	The value of the payment allocation.
Invoice	The ID and URL of the invoice to which the payment is being allocated.
Payment	The ID and URL of the payment being allocated.

Sample JSON response

```
[
 {
   "Id": 81665,
   "Value": 20,
   "Invoice": {
     "Id": 206304,
     "Url": "http://api.wildapricot.org/v2/accounts/42353/Invoices/206304"
   },
   "Payment": {
     "Id": 206306,
     "Url": "http://api.wildapricot.org/v2/accounts/42353/Payments/206306"
   }
 },
 {
   "Id": 82600,
   "Value": 32.05,
   "Invoice": {
     "Id": 206304,
     "Url": "http://api.wildapricot.org/v2/accounts/42353/Invoices/206304"
   },
   "Payment": {
     "Id": 207311,
     "Url": "http://api.wildapricot.org/v2/accounts/42353/Payments/207311"
   }
 }
]
```


Sample XML response

```
<ArrayOfPaymentAllocation xmlns:i="http://www.w3.org/2001/XMLSchema-instance"
xmlns="http://schemas.datacontract.org/2004/07/Bonasource.MembershipFS.PublicAPI.Mod
el.V2.Finances">
  <PaymentAllocation>
    <Id>81665</Id>
    <Invoice xmlns:d3p1="http://api.wildapricot.org">
      <d3p1:Id>206304</d3p1:Id>

<d3p1:Url>http://api.wildapricot.org/v2/accounts/42353/Invoices/206304</d3p1:Url>
    </Invoice>
    <Payment xmlns:d3p1="http://api.wildapricot.org">
      <d3p1:Id>206306</d3p1:Id>

<d3p1:Url>http://api.wildapricot.org/v2/accounts/42353/Payments/206306</d3p1:Url>
    </Payment>
    <Value>20.0000</Value>
  </PaymentAllocation>
  <PaymentAllocation>
    <Id>82600</Id>
    <Invoice xmlns:d3p1="http://api.wildapricot.org">
      <d3p1:Id>206304</d3p1:Id>

<d3p1:Url>http://api.wildapricot.org/v2/accounts/42353/Invoices/206304</d3p1:Url>
    </Invoice>
    <Payment xmlns:d3p1="http://api.wildapricot.org">
      <d3p1:Id>207311</d3p1:Id>

<d3p1:Url>http://api.wildapricot.org/v2/accounts/42353/Payments/207311</d3p1:Url>
    </Payment>
    <Value>32.0500</Value>
  </PaymentAllocation>
</ArrayOfPaymentAllocation>
```


On this page:

See also:

- API V2 authentication
- API V2 calls
- Payments API V2 call

Payments API V2 call

Payments API V2 call

Wild Apricot's API is intended for use by developers with technical expertise. If you need assistance, we provide support via email or through our Developers forum.

You can use the Payments API call to retrieve information for a particular payment, or for multiple payments, filtered by date, contact, or event. You can also create, edit, or delete a payment.

You can use the Payments API to migrate existing payment records to your Wild Apricot database.

Retrieving information for a particular payment

Syntax

```
GET {baseAPIaddress}/v2/Accounts/[accountID]/Payments/[paymentID]
```

Example

```
GET https://api.wildapricot.org/v2/Accounts/58293/Payments/49492
```

Retrieving multiple payments

You can use the Payments API call to retrieve multiple payments. You must include filter criteria to narrow the results. For details, see Filtering the results (below).

The payments IDs will be listed by document date in descending order.

Syntax

```
GET {baseAPIaddress}/{version}/Accounts/{accountID}/Payments/?{filterCriteria}
```

Example:

```
GET
https://api.wildapricot.org/v2/Accounts/58293/Payments?contactId=725191&StartDate=20
16-11-20
```

Parameters

The following parameters are used within the Payments API call:

Variable	Description
{baseAPIaddress}	The base address of the API. For more information, see API access options .
{version}	The version number of the API. Versions 2 and 2.1 are supported for this call. To retrieve a list of API versions, use the base API call.
{accountID}	The account identifier that appears on the Account and billing screen and is returned by the Accounts API call.
{paymentID}	The unique identifier for a payment. Invoices IDs are returned by the Payments API call.

{filterCriteria}	The criteria used to filter the search results. This is a required parameter. For details, see Filtering the results (below).

Each API call must include an authentication information that verifies your account and prevents others from accessing your data. For more information, see Authenticating API access from a 3rd-party server or application or Authenticating API access from a Wild Apricot site page.

Filtering the results

When retrieving information for multiple payments, you must include filter criteria. You can filter the results by specifying a contact or event, by specifying a start and/or end date, and by specifying a set of payment ids. You can combine multiple filter criteria to further narrow the results.

Specifying a contact or event

You can filter the payments by specifying a particular contact and/or event.
Syntax

```
GET
{baseAPIaddress}/{version}/Accounts/{accountID}/Payments/?contactId={contactID}&even
tId={eventID}
```

Example:

```
GET
https://api.wildapricot.org/v2/Accounts/58293/Payments?contactId=725191&eventId=1176
9
```

Specifying a start or end document date

You can filter the payments by specifying a start date and/or an end date (using the DocumentDate field).
Syntax

```
GET
{baseAPIaddress}/{version}/Accounts/{accountID}/Payments/?StartDate={date}&EndDate={
date}
```

where *date* is the start or end date of the range (using the *yyyy-mm-dd* date format).
Example:

```
GET
https://api.wildapricot.org/v2/Accounts/58293/Payments/?StartDate=2016-11-01&EndDate
=2016-11-30
```

Specifying a set of payment IDs

You can filter the payments by specifying a set of payment IDs.
Syntax

```
GET
{baseAPIaddress}/{version}/Accounts/{accountID}/Payments/?ids={id1},{id2},{id3}...
```

where *id* is the unique identifier of a payment.
Example:

```
GET https://api.wildapricot.org/v2/Accounts/58293/Payments/?ids=25291894,25291888
```

Retrieving just payment IDs

You can retrieve just the payment IDs that match the filter criteria by including the **idsOnly** parameter. This parameter is only available when you specify v2.1 as the API version. The payment IDs will be listed by document date in descending order.
Example

```
GET
https://api.wildapricot.org/v2/Accounts/58293/Payments?eventId=11769&idsOnly=true
```

Paging

Using the **$skip** and **$top** parameters, you can retrieve records in sets or pages. You use the $top parameter to specify the maximum number of records to be returned, and the $skip parameter to specify the number of records to skip. The $skip parameter is incremented each call to return the next set or page of records.

Example

You want to retrieve 50 records using an application that can only process 20 records at a time. Using the following calls, the application retrieves the first set of 20 records, then a second set of 20, and finally, the remaining 10 records.

```
https://api.wildapricot.org/v2/Accounts/58293/Payments?eventId=11769&$skip=0&$top=20
https://api.wildapricot.org/v2/Accounts/58293/Payments?eventId=11769&$skip=20&$top=2
0
https://api.wildapricot.org/v2/Accounts/58293/Payments?eventId=11769&$skip=40&$top=2
0
```

In this example, the $top specifies the maximum number of records to retrieve (20), and the $skip parameter is incremented from 0 to 20 to 40 to skip the recordsretrieved by the previous call(s).

Response fields

The Payments API call retrieves the following information for each payment.

Field	Description
Tender	The method used to make the payment.
Comment	Any internal notes entered for the payment.
PublicComment	Any comments entered for the payer.
AllocatedValue	The portion of the payment that is allocated to invoices.

PaymentType	The type of payment. Possible values: InvoicePayment, DonationPayment. When creating a new payment through the API, the payment type is always InvoicePayment.
Value	The amount of the payment.
DocumentDate	The date and time the payment was made.
Contact	The contact who made the payment.
CreatedDate	The date the payment was created.
CreatedBy	The contact who created the payment (if manually created).
UpdatedDate	The date the payment was last updated.
UpdatedBy	The contact who updated the payment.
ID	The unique identifier of the payment.
URL	The address of the URL call for the payment.

Sample JSON response


```
{
  "Tender": {
    "Id": 1196717,
    "Url": "https://api.wildapricot.org/v2.1/accounts/203011/Tenders/1196717",
    "Name": "Cash"
  },
  "Comment": "Paid to admin",
  "PublicComment": "Thank you for your support!",
  "AllocatedValue": 10,
  "Type": "InvoicePayment",
  "Value": 10,
  "DocumentDate": "2016-11-21T11:14:14-05:00",
  "Contact": {
    "Id": 29977001,
    "Url": "https://api.wildapricot.org/v2.1/accounts/203011/Contacts/29977001"
  },
  "CreatedDate": "2016-11-21T11:14:14",
  "CreatedBy": {
    "Id": 29976949,
    "Url": "https://api.wildapricot.org/v2.1/accounts/203011/Contacts/29976949"
  },
  "UpdatedDate": "2016-11-21T11:15:41",
  "UpdatedBy": {
    "Id": 29976949,
    "Url": "https://api.wildapricot.org/v2.1/accounts/203011/Contacts/29976949"
  },
  "Id": 25291888,
  "Url": "https://api.wildapricot.org/v2.1/accounts/203011/Payments/25291888"
}
```


Sample XML response

```
<Payment xmlns:i="http://www.w3.org/2001/XMLSchema-instance"
xmlns="http://api.wildapricot.org">
  <Id>25291888</Id>
  <Url>https://api.wildapricot.org/v2.1/accounts/203011/Payments/25291888</Url>
  <Contact>
    <Id>29977001</Id>
    <Url>https://api.wildapricot.org/v2.1/accounts/203011/Contacts/29977001</Url>
  </Contact>
  <CreatedBy>
    <Id>29976949</Id>
    <Url>https://api.wildapricot.org/v2.1/accounts/203011/Contacts/29976949</Url>
  </CreatedBy>
  <CreatedDate>2016-11-21T11:14:14</CreatedDate>
  <DocumentDate xmlns:d2p1="http://schemas.datacontract.org/2004/07/System">
    <d2p1:DateTime>2016-11-21T16:14:14Z</d2p1:DateTime>
    <d2p1:OffsetMinutes>-300</d2p1:OffsetMinutes>
  </DocumentDate>
  <UpdatedBy>
    <Id>29976949</Id>
    <Url>https://api.wildapricot.org/v2.1/accounts/203011/Contacts/29976949</Url>
  </UpdatedBy>
  <UpdatedDate>2016-11-21T11:15:41</UpdatedDate>
  <Value>10.0000</Value>
  <AllocatedValue>10.0000</AllocatedValue>
  <Comment>Paid to admin</Comment>
  <PublicComment>Thank you for your support!</PublicComment>
  <Tender>
    <Id>1196717</Id>
    <Url>https://api.wildapricot.org/v2.1/accounts/203011/Tenders/1196717</Url>
    <Name>Cash</Name>
  </Tender>
  <Type>InvoicePayment</Type>
</Payment>
```


Creating a new payment

You can use a Payments API call to create a payment.

Syntax

```
POST {baseAPIaddress}/v2/Accounts/[accountID]/Payments
{
  "Value": [value],
  "Contact":{
  "Id": [contactID]
  },
  "Tender":{
     "Id": [tenderID]
  },
  "paymentField": paymentFieldValue,
  "paymentField": paymentFieldValue,
 ...
}
```

where *Value* and *Contact* are required fields, and additional instances of *paymentField* can be Tender, Invoices, Comment, or

PublicComment. Value must be greater than zero, and will be rounded to 2 decimal places. If, when specifying multiple invoices, the payment value is not enough to cover all specified invoices, the sum will be allocated to invoices in the order in which are specified. When creating a new payment, the payment Type is always InvoicePayment. The payment date will be automatically set to the current date.

Example: payment for specific invoice

```
POST https://api.wildapricot.org/v2/Accounts/58293/Payments/
{
  "Value": 100,
  "Contact":{
 "Id": 1234567
  },
  "Invoices":[
    {
        "Id":12345
    }
  ],
  "Tender":{
    "Id": 23456
  },
  "Comment": "Late payment"
}
```

Example: payment without specifying an invoice

```
POST https://api.wildapricot.org/v2/Accounts/58293/Payments/
{
  "Value": 100,
  "Contact":{
 "Id": 1234567
  },
  "Tender":{
    "Id": 23456
  },
  "Comment": "Late payment"
}
```

If any of the required fields are missing, or if any of the fields include invalid data, a 400 Bad Request error will be returned. For more information, see API V2 status codes.

Modifying a payment

You can update an existing payment using a Payments API call.

Syntax

```
PUT {baseAPIaddress}/{version}/Accounts/{accountID}/Payments/{paymentID}
{
  "Id": paymentID,
  "{paymentField}": {paymentFieldValue},
  "{paymentField}": {paymentFieldValue},
 ...
}
```

where *paymentField* is a field returned by the Payments API call.

⚠ The payment ID must be specified both as a field and within the requesting URL. All other fields are optional.

Example

```
PUT https://api.wildapricot.org/v2/Accounts/58293/Payments/49492
{
  "Id": 49492,
  "Value": 100,
  "Comment": "Adjusted payment amount",
  "UpdatedBy": {
      "Id": 29976949
   }
}
```

If successful, the call returns an HTTP status code 200 without any data in the response body.

Deleting a payment

Syntax

```
DELETE {baseAPIaddress}/v2/Accounts/[accountID]/Payments/[paymentID]
```

Example

```
DELETE https://api.wildapricot.org/v2/Accounts/58293/Payments/49492
```

On this page:

See also:

- API V2 authentication
- API V2 calls
- PaymentAllocations API V2 call

Pictures API V2 call

Pictures API V2 call

⚠ Wild Apricot's API is intended for use by developers with technical expertise. If you need assistance, we provide support via email or through our Developers forum.

You can use the Pictures API call to upload pictures to your Wild Apricot account, and to download pictures from picture fields. To upload a picture to a picture field for a particular contact, use the Contacts API call.

Uploading a picture

You can use the Pictures API call to upload one or more pictures to your Wild Apricot account.

Syntax

```
POST {baseAPIaddress}/v2.1/Accounts/[accountID]/Pictures
```

One or more pictures can be uploaded using a multipart/form-data POST request, with the Content-Type header set to *multipart/form-data*. The multipart/form-data request contains a series of parts, with each part representing a different picture. Each part must contain a Content-Disposition header whose value is *form-data*, and a Content-Type header that begins with the *image/* and includes the mime type. Supported types are: png, jpeg, bmp. The mime type must match the actual picture content.

One of the part's properties – Name or Filename – must be set and at least one property must have a unique value. If the same Name is used in multiple parts, but different Filenames are specified, then the pictures in both parts will be uploaded. If the same Name and Filename are used in multiple parts, then only the picture in the first part will be uploaded.

Example:

```
POST https://api.wildapricot.org/v2.1/Accounts/58293/Pictures

Content-Type: multipart/form-data; boundary=AaB03x

   --AaB03x
   Content-Disposition: form-data; name="name"; filename="pic1.png"
   Content-Type: image/png

   ... contents of pic1.png ...
   --AaB03x
   Content-Disposition: form-data; name="name"; filename="pic2.png"
   Content-Type: image/png

   ... contents of pic2.png ...
   --AaB03x--
```

Limitations

- Maximum size for each picture is 10mb.
- Maximum request length is 10mb. That means that you can upload one 10mb picture or 10 pictures of 1mb each.
- There are no limits on the dimensions of the uploaded picture, but each picture will be resized to 110px after uploading.
- Supported picture types are: png, jpeg, bmp. All bmp pictures will be converted to png format.

Response

If successful, the call returns the IDs of the uploaded pictures.

```
{
    "picture0": "cldyhbc3.jpeg",
    "picture1": "kxdtilz4.jpeg"
    "picture3": "fwjzbryd.png"
}
```

The numbers of the picture identifiers on the left correspond to the order of the parts in your original call. In the above example, 4 parts were included in the call, but the third part was not valid and its picture was not uploaded.

The picture will be available for use 30 minutes after uploading.

Assigning pictures to picture fields

After a picture has been uploaded, it can be assigned to a picture field. Each uploaded picture can be assigned to a picture field only once. After it is assigned to a picture field, the picture will no longer be accessible using that picture ID.

To assign a picture to a picture field, you use the Contacts API call and follow the instructions to update a contact record. Within the FieldValues section, specify the name of the picture field to be updated and provide the picture ID as the field value.

Example

```
PUT https://api.wildapricot.org/v2.1/Accounts/58293/Contacts/1511727
{
    "Id": 1511727, // contact id
    "FieldValues": [
    {
        "FieldName": "Contact picture",
        "Value": { "Id": "cldyhbc3.jpeg" }
    },
    {
        "FieldName": "Photo",
        "Value": { "Id": "kxdtilz4.jpeg" }
    }]
}
```

Downloading a picture

You can use the Pictures API call to download a picture assigned to a picture field in your account.

Syntax

```
GET {baseAPIaddress}/v2.1/Accounts/[accountID]/Pictures/[pictureID]
```

Example:

```
GET https://api.wildapricot.org/v2.1/Accounts/58293/Pictures/fwjzbryd.png
```

To download the picture in BASE64 format, add *?asBase64=true* to the end of the API call.

If successful, the call returns a common HttpResponseMessage with content set to the picture binary data.

Parameters

The following parameters are used within the Pictures API call:

Variable	Description
baseAPIaddress	The base address of the API. For more information, see API access options .
accountID	The account identifier that appears on the Account and billing screen and is returned by the Accounts API call.

pictureID	The unique identifier assigned to a picture in a picture field. Pictures IDs can be returned as a field value using version 2.1 of the Contacts API call.

Each API call must include an authentication information that verifies your account and prevents others from accessing your data. For more information, see Authenticating API access from a 3rd-party server or application or Authenticating API access from a Wild Apricot site page.

On this page:

- Uploading a picture
- Assigning pictures to picture fields
- Downloading a picture
- Parameters

See also:

- API V2 authentication
- API V2 calls

Refunds V2 API call

Refunds V2 API call

Wild Apricot's API is intended for use by developers with technical expertise. If you need assistance, we provide support via email o r through our Developers forum.

You can use the Refunds API call to retrieve information for a particular refund, or for multiple refunds, filtered by date, contact, or event. You can also create, edit, or delete a refund.

Retrieving a particular refund

Syntax

```
GET {baseAPIaddress}/{version}/Accounts/{accountID}/Refunds/{refundID}
```

Example

```
GET https://api.wildapricot.org/v2/Accounts/58293/Refunds/1029973
```

Retrieving multiple refunds

You can use the Refunds API call to retrieve multiple refunds. You must include filter criteria to narrow the results. For details, see Filtering the results (below).

The refund IDs will be listed by document date in descending order.

Syntax

```
GET {baseAPIaddress}/{version}/Accounts/{accountID}/Refunds/?{filterCriteria}
```

Example:

```
GET
https://api.wildapricot.org/v2/Accounts/58293/Refunds?contactId=725191&StartDate=201
6-11-20
```

Parameters

The following parameters are used within the Refunds API call:

Variable	Description
{baseAPIaddress}	The base address of the API. For more information, see API access options .
{version}	The version number of the API. Versions 2 and 2.1 are supported for this call. To retrieve a list of API versions, use the base API call.
{accountID}	The account identifier that appears on the Account and billing screen and is returned by the Accounts API call.
{refundID}	The unique identifier for a refunds. Refund IDs are returned by the Refunds API call.
{filterCriteria}	The criteria used to filter the search results. This is a required parameter. For details, see Filtering the results (below).

Each API call must include an authentication information that verifies your account and prevents others from accessing your data. For more information, see Authenticating API access from a 3rd-party server or application or Authenticating API access from a Wild Apricot site page.

Filtering the results

When retrieving information for multiple refunds, you must include filter criteria. You can filter the results by specifying a contact or event, by specifying a start and/or end date, and by specifying a set of refund ids. You can combine multiple filter criteria to further narrow the results.

Specifying a contact or event

You can filter the refunds by specifying a particular contact and/or event.
Syntax

```
GET
{baseAPIaddress}/{version}/Accounts/{accountID}/Refunds/?contactId={contactID}&event
Id={eventID}
```

Example:

```
GET
https://api.wildapricot.org/v2/Accounts/58293/Refunds?contactId=725191&eventId=11769
```

Specifying a start or end document date

You can filter the refunds by specifying a start date and/or an end date (using the DocumentDate field).
Syntax

```
GET
{baseAPIaddress}/{version}/Accounts/{accountID}/Refunds/?StartDate={date}&EndDate={d
ate}
```

where *date* is the start or end date of the range (using the *yyyy-mm-dd* date format).
Example:

```
GET
https://api.wildapricot.org/v2/Accounts/58293/Refunds/?StartDate=2016-11-01&EndDate=
2016-11-30
```

Specifying a set of refund IDs

You can filter the refunds by specifying a set of refund IDs.
Syntax

```
GET
{baseAPIaddress}/{version}/Accounts/{accountID}/Refunds/?ids={id1},{id2},{id3}...
```

where *id* is the unique identifier of a refund.
Example:

```
GET https://api.wildapricot.org/v2/Accounts/58293/Refunds/?ids=25291887,25291888
```

Retrieving just refund IDs

You can retrieve just the refund IDs that match the filter criteria by including the **idsOnly** parameter. This parameter is only available when you specify v2.1 as the API version. The refund IDs will be listed by document date in descending order.
Example

```
GET https://api.wildapricot.org/v2/Accounts/58293/Refunds?eventId=11769&idsOnly=true
```

Paging

Using the **$skip** and **$top** parameters, you can retrieve records in sets or pages. You use the $top parameter to specify the maximum number of records to be returned, and the $skip parameter to specify the number of records to skip. The $skip parameter is incremented each call to return the next set or page of records.

Example

You want to retrieve 50 records using an application that can only process 20 records at a time. Using the following calls, the application retrieves the first set of 20 records, then a second set of 20, and finally, the remaining 10 records.

```
https://api.wildapricot.org/v2/Accounts/58293/Refunds?eventId=11769&$skip=0&$top=20
https://api.wildapricot.org/v2/Accounts/58293/Refunds?eventId=11769&$skip=20&$top=20
https://api.wildapricot.org/v2/Accounts/58293/Refunds?eventId=11769&$skip=40&$top=20
```

In this example, the $top specifies the maximum number of records to retrieve (20), and the $skip parameter is incremented from 0 to 20 to

40 to skip the recordsretrieved by the previous call(s).

Response fields

The Refunds API call retrieves the following information for each refund.

Field	Description
Tender	The method used to refund the payment. For each tender, the tender name, tender ID, and tender URL are returned.
Comment	Any internal notes entered for the refund.
PublicComment	Any comments entered for the payer.
SettledValue	The previously settled amount of the payment.
Value	The amount of the refund.
DocumentDate	The date and time the refund was made.
Contact	The contact to whom the refund was made. For each contact, the contact ID and contact URL are returned.
CreatedDate	The date the refund was created.
CreatedBy	The contact who created the refund (if manually created).
UpdatedDate	The date the refund was last updated.
UpdatedBy	The contact who updated the refund.
ID	The unique identifier of the refund.
URL	The address of the URL call for the refund.

Sample JSON response

```
[
  {
    "Tender": {
      "Id": 1196720,
      "Url": "https://api.wildapricot.org/v2/accounts/203011/Tenders/1196720",
      "Name": "PayPal"
    },
    "Comment": "Payment recorded in error",
    "PublicComment": "Refunded in full",
    "SettledValue": 0,
    "Value": -20,
    "DocumentDate": "2016-11-21T11:13:28-05:00",
    "Contact": {
      "Id": 29976949,
      "Url": "https://api.wildapricot.org/v2/accounts/203011/Contacts/29976949"
    },
    "CreatedDate": "2016-11-21T11:13:28",
    "CreatedBy": {
      "Id": 29976949,
      "Url": "https://api.wildapricot.org/v2/accounts/203011/Contacts/29976949"
    },
    "UpdatedDate": null,
    "UpdatedBy": null,
    "Id": 25291887,
    "Url": "https://api.wildapricot.org/v2/accounts/203011/Refunds/25291887"
  }
]
```


Sample XML response

```
<Refund xmlns:i="http://www.w3.org/2001/XMLSchema-instance"
xmlns="http://api.wildapricot.org">
  <Id>25291887</Id>
  <Url>http://api.wildapricot.org/v2/accounts/203011/Refunds/25291887</Url>
  <Contact>
    <Id>29976949</Id>
    <Url>http://api.wildapricot.org/v2/accounts/203011/Contacts/29976949</Url>
  </Contact>
  <CreatedBy>
    <Id>29976949</Id>
    <Url>http://api.wildapricot.org/v2/accounts/203011/Contacts/29976949</Url>
  </CreatedBy>
  <CreatedDate>2016-11-21T11:13:28</CreatedDate>
  <DocumentDate xmlns:d2p1="http://schemas.datacontract.org/2004/07/System">
    <d2p1:DateTime>2016-11-21T16:13:28Z</d2p1:DateTime>
    <d2p1:OffsetMinutes>-300</d2p1:OffsetMinutes>
  </DocumentDate>
  <UpdatedBy i:nil="true" />
  <UpdatedDate i:nil="true" />
  <Value>-20.0000</Value>
  <Comment>Payment recorded in error</Comment>
  <PublicComment>Refunded in full</PublicComment>
  <SettledValue>0.0000</SettledValue>
  <Tender>
    <Id>1196720</Id>
    <Url>http://api.wildapricot.org/v2/accounts/203011/Tenders/1196720</Url>
    <Name>PayPal</Name>
  </Tender>
</Refund>
```

Creating a new refund

You can use the Refunds API call to create a new refund.

Syntax

```
POST {baseAPIaddress}/{version}/Accounts/{accountID}/Refunds
{
  "{refundField}": {refundFieldValue},
  "{refundField}": {refundFieldValue},
 ...
}
```

where *refundField* is a field returned by the Refunds API call.

Example

```
POST https://api.wildapricot.org/v2/Accounts/58293/Refunds
{
  "EventId": 51258,
   "Tender": {
      "Id": 1196720,
      "Url": "https://api.wildapricot.org/v2/accounts/203011/Tenders/1196720",
      "Name": "PayPal"
    },
    "Comment": "Payment recorded in error",
    "PublicComment": "Refunded in full",
    "SettledValue": 0,
    "Value": -20,
    "DocumentDate": "2016-11-21T11:13:28-05:00",
    "Contact": {
      "Id": 29976949,
      "Url": "https://api.wildapricot.org/v2/accounts/203011/Contacts/29976949"
    },
    "CreatedDate": "2016-11-21T11:13:28",
    "CreatedBy": {
      "Id": 29976949,
      "Url": "https://api.wildapricot.org/v2/accounts/203011/Contacts/29976949"
    }
}
```

If successful, the call will return the new refund ID.

Updating a refund

You can update an existing refund using a Refunds API call.

Syntax

```
PUT {baseAPIaddress}/{version}/Accounts/{accountID}/Refunds/{refundID}
{
  "Id": refundID,
  "{refundField}": {refundFieldValue},
  "{refundField}": {refundFieldValue},
 ...
}
```

where *refundField* is a field returned by the Refunds API call.

> ⚠ The refund ID must be specified both as a field and within the requesting URL. All other refund fields are optional.

Example

```
PUT https://api.wildapricot.org/v2/Accounts/58293/Refunds/1029973
{
  "Id": 1029973,
  "Value": -40,
  "UpdatedDate": "2016-11-21T11:13:28",
  "UpdatedBy": {
      "Id": 29976949,
      "Url": "https://api.wildapricot.org/v2/accounts/203011/Contacts/29976949"
   }
}
```

If successful, the call returns an HTTP status code 200 without any data in the response body.

Deleting a refund

You can use a Refunds API call to delete an existing refund.

Syntax

```
DELETE {baseAPIaddress}/{version}/Accounts/{accountID}/Refunds/{refundID}
```

where *refundID* is the ID of the refund you want to delete.

Example

```
DELETE https://api.wildapricot.org/v2/Accounts/58293/Refunds/1029973
```

If successful, the call returns HTTP 200 Success. If unsuccessful, returns HTTP 400 bad request.

On this page:

See also:

- API V2 authentication
- API V2 calls

SavedSearches API V2 call

SavedSearches API V2 call

Wild Apricot's API is intended for use by developers with technical expertise. If you need assistance, we provide support via email o r through our Developers forum.

You can use the SavedSearches API call to retrieve information about saved contact searches or saved member searches. You can retrieve information for all saved searches, and just for a particular search.

Retrieving information for a particular saved search

Syntax

```
GET {baseAPIaddress}/v2/Accounts/{accountID}/SavedSearches/{searchID}
```

Example

```
GET https://api.wildapricot.org/v2/Accounts/58293/SavedSearches/238
```

Retrieving information for all saved searches

Syntax

```
GET {baseAPIaddress}/v2/Accounts/{accountID}/SavedSearches
```

Example

```
GET https://api.wildapricot.org/v2/Accounts/58293/SavedSearches
```

> Each API call must include an authentication information that verifies your account and prevents others from accessing your data. For more information, see Authenticating API access from a 3rd-party server or application or Authenticating API access from a Wild Apricot site page.

Parameters

The following parameters are used within the SavedSearches API call:

Variable	Description
{baseAPIaddress}	The base address of the API. For more information, see API access options .
{accountID}	The account identifier that appears on the Account and billing screen and is returned by the Accounts API call.
{searchID}	The unique identifier of a saved search. Search IDs are returned by the SavedSearches API call.

Response fields

For each saved search, the SavedSearches API call retrieves the following information.

Field	Description
IsBuiltIn	Indicates whether the search is a built-in system search that cannot be modified or deleted.
ContactIDs	The contact IDs of contacts that match the search criteria. Contact IDs are only returned when retrieving information for a specific saved search.

ID	The unique identifier of the search.
URL	The address of the API call for this search.
Name	The name assigned to the saved search.

Sample JSON response


```
[
  {
    "IsBuiltIn": false,
    "Id": 240,
    "Url": "http://api.wildapricot.org/v2/accounts/42353/SavedSearches/240",
    "Name": "Active NY members"
  },
  {
    "IsBuiltIn": false,
    "Id": 241,
    "Url": "http://api.wildapricot.org/v2/accounts/42353/SavedSearches/241",
    "Name": "Platinum pending renewal"
  }
]
```


Sample XML response


```
<ArrayOfSavedSearch xmlns:i="http://www.w3.org/2001/XMLSchema-instance"
xmlns="http://schemas.datacontract.org/2004/07/Bonasource.MembershipFS.PublicAPI.Mod
el.V2.Contacts">
  <SavedSearch>
    <Id xmlns="http://api.wildapricot.org">240</Id>
    <Url
xmlns="http://api.wildapricot.org">http://api.wildapricot.org/v2/accounts/42353/Save
dSearches/240</Url>
    <Name xmlns="http://api.wildapricot.org">Active NY members</Name>
    <ContactIds
xmlns:d3p1="http://schemas.microsoft.com/2003/10/Serialization/Arrays" i:nil="true"
/>
    <IsBuiltIn>false</IsBuiltIn>
  </SavedSearch>
  <SavedSearch>
    <Id xmlns="http://api.wildapricot.org">241</Id>
    <Url
xmlns="http://api.wildapricot.org">http://api.wildapricot.org/v2/accounts/42353/Save
dSearches/241</Url>
    <Name xmlns="http://api.wildapricot.org">Platinum pending renewal</Name>
    <ContactIds
xmlns:d3p1="http://schemas.microsoft.com/2003/10/Serialization/Arrays" i:nil="true"
/>
    <IsBuiltIn>false</IsBuiltIn>
  </SavedSearch>
</ArrayOfSavedSearch>
```


On this page:

See also:

- API V2 authentication
- API V2 calls

Tenders API V2 call

Tenders API V2 call

> Wild Apricot's API is intended for use by developers with technical expertise. If you need assistance, we provide support via email o r through our Developers forum.

You can use the Tenders API call to retrieve information about tenders – the methods by which payments are received. You can retrieve information about a particular tender or about all tenders within the specified account.

Retrieving information for a particular tender

Syntax

```
GET {baseAPIaddress}/v2/Accounts/{accountID}/Tenders/{tenderID}
```

Example

```
GET https://api.wildapricot.org/v2/Accounts/58293/Tenders/49490
```

Retrieving information for all tenders

Syntax

```
GET {baseAPIaddress}/v2/Accounts/{accountID}/Tenders
```

Example

```
GET https://api.wildapricot.org/v2/Accounts/58293/Tenders
```

> Each API call must include an authentication information that verifies your account and prevents others from accessing your data. For more information, see Authenticating API access from a 3rd-party server or application or Authenticating API access from a Wild Apricot site page.

Parameters

The following parameters are used within the Tenders API call:

Variable	Description
{baseAPIaddress}	The base address of the API. For more information, see API access options.

{accountID}	The account identifier that appears on the Account and billing screen and is returned by the Accounts API call .
{tenderID}	The unique identifier of the tender. Tender IDs are returned by the Tenders API call.

Response fields

For each tender, the Tenders API call retrieves the following information.

Field	Description
DisplayPosition	The position of the tender within the tenders list.
IsCustom	Indicates whether the tender was created by an administrator.
ID	The unique identifier of the tender.
URL	The address of the API call for this tender.
Name	The name assigned to the tender.

Sample JSON response

Click here to expand/collapse


```
[
  {
    "DisplayPosition": 1,
    "IsCustom": true,
    "Id": 49489,
    "Url": "http://api.wildapricot.org/v2/accounts/42353/Tenders/49489",
    "Name": "Cash"
  },
  {
    "DisplayPosition": 2,
    "IsCustom": true,
    "Id": 49490,
    "Url": "http://api.wildapricot.org/v2/accounts/42353/Tenders/49490",
    "Name": "Check"
  },
  {
    "DisplayPosition": 3,
    "IsCustom": true,
    "Id": 49491,
    "Url": "http://api.wildapricot.org/v2/accounts/42353/Tenders/49491",
    "Name": "Wire transfer"
  },
  {
    "DisplayPosition": 4,
    "IsCustom": true,
    "Id": 49492,
    "Url": "http://api.wildapricot.org/v2/accounts/42353/Tenders/49492",
    "Name": "PayPal"
  },
  {
    "DisplayPosition": 5,
    "IsCustom": true,
    "Id": 49493,
    "Url": "http://api.wildapricot.org/v2/accounts/42353/Tenders/49493",
    "Name": "Credit Card"
```

```
    },
    {
      "DisplayPosition": 6,
      "IsCustom": true,
      "Id": 49494,
      "Url": "http://api.wildapricot.org/v2/accounts/42353/Tenders/49494",
      "Name": "Special discount"
    },
    {
      "DisplayPosition": 120,
      "IsCustom": false,
      "Id": 1,
      "Url": "http://api.wildapricot.org/v2/accounts/42353/Tenders/1",
      "Name": "PayPal Payments Standard"
    },
    {
      "DisplayPosition": 121,
      "IsCustom": false,
      "Id": 2,
      "Url": "http://api.wildapricot.org/v2/accounts/42353/Tenders/2",
      "Name": "PayPal Subscription Payment"
    },
    {
      "DisplayPosition": 210,
      "IsCustom": false,
      "Id": 3,
      "Url": "http://api.wildapricot.org/v2/accounts/42353/Tenders/3",
      "Name": "PayPal Credit Card"
    },
    {
      "DisplayPosition": 211,
      "IsCustom": false,
      "Id": 4,
      "Url": "http://api.wildapricot.org/v2/accounts/42353/Tenders/4",
      "Name": "PayPal Credit Card Recurring Payment"
    },
    {
      "DisplayPosition": 220,
      "IsCustom": false,
      "Id": 5,
      "Url": "http://api.wildapricot.org/v2/accounts/42353/Tenders/5",
      "Name": "PayPal Express Checkout"
    },
    {
      "DisplayPosition": 221,
      "IsCustom": false,
      "Id": 6,
      "Url": "http://api.wildapricot.org/v2/accounts/42353/Tenders/6",
      "Name": "PayPal Recurring Payment"
    },
    {
      "DisplayPosition": 230,
      "IsCustom": false,
      "Id": 48326,
      "Url": "http://api.wildapricot.org/v2/accounts/42353/Tenders/48326",
      "Name": "PayPal Payments Advanced"
    },
    {
      "DisplayPosition": 240,
```

```
    "IsCustom": false,
    "Id": 48324,
    "Url": "http://api.wildapricot.org/v2/accounts/42353/Tenders/48324",
    "Name": "PayPal Payflow Pro Credit Card"
  },
  {
    "DisplayPosition": 241,
    "IsCustom": false,
    "Id": 48325,
    "Url": "http://api.wildapricot.org/v2/accounts/42353/Tenders/48325",
    "Name": "PayPal Payflow Pro Recurring Payment"
  },
  {
    "DisplayPosition": 310,
    "IsCustom": false,
    "Id": 7,
    "Url": "http://api.wildapricot.org/v2/accounts/42353/Tenders/7",
    "Name": "Authorize.NET Credit Card"
  },
  {
    "DisplayPosition": 311,
    "IsCustom": false,
    "Id": 8,
    "Url": "http://api.wildapricot.org/v2/accounts/42353/Tenders/8",
    "Name": "Authorize.NET Recurring Payment"
  },
  {
    "DisplayPosition": 420,
    "IsCustom": false,
    "Id": 9,
    "Url": "http://api.wildapricot.org/v2/accounts/42353/Tenders/9",
    "Name": "Google Account"
  },
  {
    "DisplayPosition": 510,
    "IsCustom": false,
    "Id": 48314,
    "Url": "http://api.wildapricot.org/v2/accounts/42353/Tenders/48314",
    "Name": "2Checkout"
  },
  {
    "DisplayPosition": 511,
    "IsCustom": false,
    "Id": 48359,
    "Url": "http://api.wildapricot.org/v2/accounts/42353/Tenders/48359",
    "Name": "2Checkout Recurring Payment"
  },
  {
    "DisplayPosition": 610,
    "IsCustom": false,
    "Id": 48315,
    "Url": "http://api.wildapricot.org/v2/accounts/42353/Tenders/48315",
    "Name": "BluePay Credit Card"
  },
  {
    "DisplayPosition": 611,
    "IsCustom": false,
    "Id": 48316,
    "Url": "http://api.wildapricot.org/v2/accounts/42353/Tenders/48316",
```

```
      "Name": "BluePay Recurring Payment"
    },
    {
      "DisplayPosition": 710,
      "IsCustom": false,
      "Id": 48317,
      "Url": "http://api.wildapricot.org/v2/accounts/42353/Tenders/48317",
      "Name": "CRE Secure Credit Card"
    },
    {
      "DisplayPosition": 711,
      "IsCustom": false,
      "Id": 48318,
      "Url": "http://api.wildapricot.org/v2/accounts/42353/Tenders/48318",
      "Name": "CRE Secure Recurring Payment"
    },
    {
      "DisplayPosition": 810,
      "IsCustom": false,
      "Id": 48319,
      "Url": "http://api.wildapricot.org/v2/accounts/42353/Tenders/48319",
      "Name": "Global Payments Credit Card"
    },
    {
      "DisplayPosition": 910,
      "IsCustom": false,
      "Id": 48320,
      "Url": "http://api.wildapricot.org/v2/accounts/42353/Tenders/48320",
      "Name": "IATS Credit Card"
    },
    {
      "DisplayPosition": 911,
      "IsCustom": false,
      "Id": 48321,
      "Url": "http://api.wildapricot.org/v2/accounts/42353/Tenders/48321",
      "Name": "IATS Recurring Payment"
    },
    {
      "DisplayPosition": 1010,
      "IsCustom": false,
      "Id": 48322,
      "Url": "http://api.wildapricot.org/v2/accounts/42353/Tenders/48322",
      "Name": "Moneris Credit Card"
    },
    {
      "DisplayPosition": 1011,
      "IsCustom": false,
      "Id": 48323,
      "Url": "http://api.wildapricot.org/v2/accounts/42353/Tenders/48323",
      "Name": "Moneris Recurring Payment"
    },
    {
      "DisplayPosition": 1110,
      "IsCustom": false,
      "Id": 48327,
      "Url": "http://api.wildapricot.org/v2/accounts/42353/Tenders/48327",
      "Name": "Skrill"
    },
    {
```

```
"DisplayPosition": 1111,
"IsCustom": false,
"Id": 48328,
"Url": "http://api.wildapricot.org/v2/accounts/42353/Tenders/48328",
```

```
    "Name": "Skrill Recurring Payment"
  }
]
```

Sample XML response

Click here to expand/collapse

```
ArrayOfTender xmlns:i="http://www.w3.org/2001/XMLSchema-instance"
xmlns="http://schemas.datacontract.org/2004/07/Bonasource.MembershipFS.PublicAPI.
Model.V2.Finances">
  <Tender>
    <Id xmlns="http://api.wildapricot.org">49489</Id>
    <Url
xmlns="http://api.wildapricot.org">http://api.wildapricot.org/v2/accounts/42353/T
enders/49489</Url>
    <Name xmlns="http://api.wildapricot.org">Cash</Name>
    <DisplayPosition>1</DisplayPosition>
    <IsCustom>true</IsCustom>
  </Tender>
  <Tender>
    <Id xmlns="http://api.wildapricot.org">49490</Id>
    <Url
xmlns="http://api.wildapricot.org">http://api.wildapricot.org/v2/accounts/42353/T
enders/49490</Url>
    <Name xmlns="http://api.wildapricot.org">Check</Name>
    <DisplayPosition>2</DisplayPosition>
    <IsCustom>true</IsCustom>
  </Tender>
  <Tender>
    <Id xmlns="http://api.wildapricot.org">49491</Id>
    <Url
xmlns="http://api.wildapricot.org">http://api.wildapricot.org/v2/accounts/42353/T
enders/49491</Url>
    <Name xmlns="http://api.wildapricot.org">Wire transfer</Name>
    <DisplayPosition>3</DisplayPosition>
    <IsCustom>true</IsCustom>
  </Tender>
  <Tender>
    <Id xmlns="http://api.wildapricot.org">49492</Id>
    <Url
xmlns="http://api.wildapricot.org">http://api.wildapricot.org/v2/accounts/42353/T
enders/49492</Url>
    <Name xmlns="http://api.wildapricot.org">PayPal</Name>
    <DisplayPosition>4</DisplayPosition>
    <IsCustom>true</IsCustom>
  </Tender>
  <Tender>
    <Id xmlns="http://api.wildapricot.org">49493</Id>
    <Url
xmlns="http://api.wildapricot.org">http://api.wildapricot.org/v2/accounts/42353/T
enders/49493</Url>
    <Name xmlns="http://api.wildapricot.org">Credit Card</Name>
    <DisplayPosition>5</DisplayPosition>
    <IsCustom>true</IsCustom>
  </Tender>
  <Tender>
```

```
    <Id xmlns="http://api.wildapricot.org">49494</Id>
    <Url
xmlns="http://api.wildapricot.org">http://api.wildapricot.org/v2/accounts/42353/T
enders/49494</Url>
    <Name xmlns="http://api.wildapricot.org">Special discount</Name>
    <DisplayPosition>6</DisplayPosition>
    <IsCustom>true</IsCustom>
  </Tender>
  <Tender>
    <Id xmlns="http://api.wildapricot.org">1</Id>
    <Url
xmlns="http://api.wildapricot.org">http://api.wildapricot.org/v2/accounts/42353/T
enders/1</Url>
    <Name xmlns="http://api.wildapricot.org">PayPal Payments Standard</Name>
    <DisplayPosition>120</DisplayPosition>
    <IsCustom>false</IsCustom>
  </Tender>
  <Tender>
    <Id xmlns="http://api.wildapricot.org">2</Id>
    <Url
xmlns="http://api.wildapricot.org">http://api.wildapricot.org/v2/accounts/42353/T
enders/2</Url>
    <Name xmlns="http://api.wildapricot.org">PayPal Subscription Payment</Name>
    <DisplayPosition>121</DisplayPosition>
    <IsCustom>false</IsCustom>
  </Tender>
  <Tender>
    <Id xmlns="http://api.wildapricot.org">3</Id>
    <Url
xmlns="http://api.wildapricot.org">http://api.wildapricot.org/v2/accounts/42353/T
enders/3</Url>
    <Name xmlns="http://api.wildapricot.org">PayPal Credit Card</Name>
    <DisplayPosition>210</DisplayPosition>
    <IsCustom>false</IsCustom>
  </Tender>
  <Tender>
    <Id xmlns="http://api.wildapricot.org">4</Id>
    <Url
xmlns="http://api.wildapricot.org">http://api.wildapricot.org/v2/accounts/42353/T
enders/4</Url>
    <Name xmlns="http://api.wildapricot.org">PayPal Credit Card Recurring
Payment</Name>
    <DisplayPosition>211</DisplayPosition>
    <IsCustom>false</IsCustom>
  </Tender>
  <Tender>
    <Id xmlns="http://api.wildapricot.org">5</Id>
    <Url
xmlns="http://api.wildapricot.org">http://api.wildapricot.org/v2/accounts/42353/T
enders/5</Url>
    <Name xmlns="http://api.wildapricot.org">PayPal Express Checkout</Name>
    <DisplayPosition>220</DisplayPosition>
    <IsCustom>false</IsCustom>
  </Tender>
  <Tender>
    <Id xmlns="http://api.wildapricot.org">6</Id>
    <Url
xmlns="http://api.wildapricot.org">http://api.wildapricot.org/v2/accounts/42353/T
enders/6</Url>
```

```
    &lt;Name xmlns="http://api.wildapricot.org"&gt;PayPal Recurring Payment&lt;/Name&gt;
    &lt;DisplayPosition&gt;221&lt;/DisplayPosition&gt;
    &lt;IsCustom&gt;false&lt;/IsCustom&gt;
  &lt;/Tender&gt;
  &lt;Tender&gt;
    &lt;Id xmlns="http://api.wildapricot.org"&gt;48326&lt;/Id&gt;
    <Url
xmlns="http://api.wildapricot.org">http://api.wildapricot.org/v2/accounts/42353/T
enders/48326&lt;/Url&gt;
    &lt;Name xmlns="http://api.wildapricot.org"&gt;PayPal Payments Advanced&lt;/Name&gt;
    &lt;DisplayPosition&gt;230&lt;/DisplayPosition&gt;
    &lt;IsCustom&gt;false&lt;/IsCustom&gt;
  &lt;/Tender&gt;
  &lt;Tender&gt;
    &lt;Id xmlns="http://api.wildapricot.org"&gt;48324&lt;/Id&gt;
    <Url
xmlns="http://api.wildapricot.org">http://api.wildapricot.org/v2/accounts/42353/T
enders/48324&lt;/Url&gt;
    &lt;Name xmlns="http://api.wildapricot.org"&gt;PayPal Payflow Pro Credit
Card&lt;/Name&gt;
    &lt;DisplayPosition&gt;240&lt;/DisplayPosition&gt;
    &lt;IsCustom&gt;false&lt;/IsCustom&gt;
  &lt;/Tender&gt;
  &lt;Tender&gt;
    &lt;Id xmlns="http://api.wildapricot.org"&gt;48325&lt;/Id&gt;
    <Url
xmlns="http://api.wildapricot.org">http://api.wildapricot.org/v2/accounts/42353/T
enders/48325&lt;/Url&gt;
    &lt;Name xmlns="http://api.wildapricot.org"&gt;PayPal Payflow Pro Recurring
Payment&lt;/Name&gt;
    &lt;DisplayPosition&gt;241&lt;/DisplayPosition&gt;
    &lt;IsCustom&gt;false&lt;/IsCustom&gt;
  &lt;/Tender&gt;
  &lt;Tender&gt;
    &lt;Id xmlns="http://api.wildapricot.org"&gt;7&lt;/Id&gt;
    <Url
xmlns="http://api.wildapricot.org">http://api.wildapricot.org/v2/accounts/42353/T
enders/7&lt;/Url&gt;
    &lt;Name xmlns="http://api.wildapricot.org"&gt;Authorize.NET Credit Card&lt;/Name&gt;
    &lt;DisplayPosition&gt;310&lt;/DisplayPosition&gt;
    &lt;IsCustom&gt;false&lt;/IsCustom&gt;
  &lt;/Tender&gt;
  &lt;Tender&gt;
    &lt;Id xmlns="http://api.wildapricot.org"&gt;8&lt;/Id&gt;
    <Url
xmlns="http://api.wildapricot.org">http://api.wildapricot.org/v2/accounts/42353/T
enders/8&lt;/Url&gt;
    &lt;Name xmlns="http://api.wildapricot.org"&gt;Authorize.NET Recurring
Payment&lt;/Name&gt;
    &lt;DisplayPosition&gt;311&lt;/DisplayPosition&gt;
    &lt;IsCustom&gt;false&lt;/IsCustom&gt;
  &lt;/Tender&gt;
  &lt;Tender&gt;
    &lt;Id xmlns="http://api.wildapricot.org"&gt;9&lt;/Id&gt;
    <Url
xmlns="http://api.wildapricot.org">http://api.wildapricot.org/v2/accounts/42353/T
enders/9&lt;/Url&gt;
    &lt;Name xmlns="http://api.wildapricot.org"&gt;Google Account&lt;/Name&gt;
    &lt;DisplayPosition&gt;420&lt;/DisplayPosition&gt;
```

```
    <IsCustom>false</IsCustom>
  </Tender>
  <Tender>
    <Id xmlns="http://api.wildapricot.org">48314</Id>
    <Url
xmlns="http://api.wildapricot.org">http://api.wildapricot.org/v2/accounts/42353/T
enders/48314</Url>
    <Name xmlns="http://api.wildapricot.org">2Checkout</Name>
    <DisplayPosition>510</DisplayPosition>
    <IsCustom>false</IsCustom>
  </Tender>
  <Tender>
    <Id xmlns="http://api.wildapricot.org">48359</Id>
    <Url
xmlns="http://api.wildapricot.org">http://api.wildapricot.org/v2/accounts/42353/T
enders/48359</Url>
    <Name xmlns="http://api.wildapricot.org">2Checkout Recurring Payment</Name>
    <DisplayPosition>511</DisplayPosition>
    <IsCustom>false</IsCustom>
  </Tender>
  <Tender>
    <Id xmlns="http://api.wildapricot.org">48315</Id>
    <Url
xmlns="http://api.wildapricot.org">http://api.wildapricot.org/v2/accounts/42353/T
enders/48315</Url>
    <Name xmlns="http://api.wildapricot.org">BluePay Credit Card</Name>
    <DisplayPosition>610</DisplayPosition>
    <IsCustom>false</IsCustom>
  </Tender>
  <Tender>
    <Id xmlns="http://api.wildapricot.org">48316</Id>
    <Url
xmlns="http://api.wildapricot.org">http://api.wildapricot.org/v2/accounts/42353/T
enders/48316</Url>
    <Name xmlns="http://api.wildapricot.org">BluePay Recurring Payment</Name>
    <DisplayPosition>611</DisplayPosition>
    <IsCustom>false</IsCustom>
  </Tender>
  <Tender>
    <Id xmlns="http://api.wildapricot.org">48317</Id>
    <Url
xmlns="http://api.wildapricot.org">http://api.wildapricot.org/v2/accounts/42353/T
enders/48317</Url>
    <Name xmlns="http://api.wildapricot.org">CRE Secure Credit Card</Name>
    <DisplayPosition>710</DisplayPosition>
    <IsCustom>false</IsCustom>
  </Tender>
  <Tender>
    <Id xmlns="http://api.wildapricot.org">48318</Id>
    <Url
xmlns="http://api.wildapricot.org">http://api.wildapricot.org/v2/accounts/42353/T
enders/48318</Url>
    <Name xmlns="http://api.wildapricot.org">CRE Secure Recurring Payment</Name>
    <DisplayPosition>711</DisplayPosition>
    <IsCustom>false</IsCustom>
  </Tender>
  <Tender>
    <Id xmlns="http://api.wildapricot.org">48319</Id>
    <Url
```

```
xmlns="http://api.wildapricot.org">http://api.wildapricot.org/v2/accounts/42353/T
enders/48319&lt;/Url&gt;
    &lt;Name xmlns="http://api.wildapricot.org"&gt;Global Payments Credit Card&lt;/Name&gt;
    &lt;DisplayPosition&gt;810&lt;/DisplayPosition&gt;
    &lt;IsCustom&gt;false&lt;/IsCustom&gt;
  &lt;/Tender&gt;
  &lt;Tender&gt;
    &lt;Id xmlns="http://api.wildapricot.org"&gt;48320&lt;/Id&gt;
    <Url
xmlns="http://api.wildapricot.org">http://api.wildapricot.org/v2/accounts/42353/T
enders/48320&lt;/Url&gt;
    &lt;Name xmlns="http://api.wildapricot.org"&gt;IATS Credit Card&lt;/Name&gt;
    &lt;DisplayPosition&gt;910&lt;/DisplayPosition&gt;
    &lt;IsCustom&gt;false&lt;/IsCustom&gt;
  &lt;/Tender&gt;
  &lt;Tender&gt;
    &lt;Id xmlns="http://api.wildapricot.org"&gt;48321&lt;/Id&gt;
    <Url
xmlns="http://api.wildapricot.org">http://api.wildapricot.org/v2/accounts/42353/T
enders/48321&lt;/Url&gt;
    &lt;Name xmlns="http://api.wildapricot.org"&gt;IATS Recurring Payment&lt;/Name&gt;
    &lt;DisplayPosition&gt;911&lt;/DisplayPosition&gt;
    &lt;IsCustom&gt;false&lt;/IsCustom&gt;
  &lt;/Tender&gt;
  &lt;Tender&gt;
    &lt;Id xmlns="http://api.wildapricot.org"&gt;48322&lt;/Id&gt;
    <Url
xmlns="http://api.wildapricot.org">http://api.wildapricot.org/v2/accounts/42353/T
enders/48322&lt;/Url&gt;
    &lt;Name xmlns="http://api.wildapricot.org"&gt;Moneris Credit Card&lt;/Name&gt;
    &lt;DisplayPosition&gt;1010&lt;/DisplayPosition&gt;
    &lt;IsCustom&gt;false&lt;/IsCustom&gt;
  &lt;/Tender&gt;
  &lt;Tender&gt;
    &lt;Id xmlns="http://api.wildapricot.org"&gt;48323&lt;/Id&gt;
    <Url
xmlns="http://api.wildapricot.org">http://api.wildapricot.org/v2/accounts/42353/T
enders/48323&lt;/Url&gt;
    &lt;Name xmlns="http://api.wildapricot.org"&gt;Moneris Recurring Payment&lt;/Name&gt;
    &lt;DisplayPosition&gt;1011&lt;/DisplayPosition&gt;
    &lt;IsCustom&gt;false&lt;/IsCustom&gt;
  &lt;/Tender&gt;
  &lt;Tender&gt;
    &lt;Id xmlns="http://api.wildapricot.org"&gt;48327&lt;/Id&gt;
    <Url
xmlns="http://api.wildapricot.org">http://api.wildapricot.org/v2/accounts/42353/T
enders/48327&lt;/Url&gt;
    &lt;Name xmlns="http://api.wildapricot.org"&gt;Skrill&lt;/Name&gt;
    &lt;DisplayPosition&gt;1110&lt;/DisplayPosition&gt;
    &lt;IsCustom&gt;false&lt;/IsCustom&gt;
  &lt;/Tender&gt;
  &lt;Tender&gt;
    &lt;Id xmlns="http://api.wildapricot.org"&gt;48328&lt;/Id&gt;
    <Url
xmlns="http://api.wildapricot.org">http://api.wildapricot.org/v2/accounts/42353/T
enders/48328&lt;/Url&gt;
    &lt;Name xmlns="http://api.wildapricot.org"&gt;Skrill Recurring Payment&lt;/Name&gt;
    &lt;DisplayPosition&gt;1111&lt;/DisplayPosition&gt;
```

```
    <IsCustom>false</IsCustom>
  </Tender>
</ArrayOfTender>
```

On this page:

See also:

- API V2 authentication
- API V2 calls

Remote procedure calls

Remote procedure calls

Wild Apricot's API includes a number of remote procedure calls. While RESTfull API is the main model used by Wild Apricot API, some actions can be performed more efficiently with the remote procedure call model.

All Wild Apricot remote procedure calls are performed using the POST http method. In general, remote procedure calls use the following syntax:

```
POST {baseAPIaddress}/v2/rpc/{accountID}/{action}
```

where *accountID* is the account identifier that appears on the Account and billing screen and is returned by the Accounts API call , and *action* is the name of the remote procedure.

The following remote procedure calls are supported.

Voiding an invoice

You can perform a remote procedure call to void an invoice.

Syntax

```
POST {baseAPIaddress}/{version}/rpc/{accountID}/VoidInvoice?invoiceId={invoice_id}
```

where *invoiceID* is the unique identifier of an invoice returned by the Invoices API call .

Example

```
POST https://api.wildapricot.org/v2/rpc/58293/VoidInvoice?invoiceId=206311
```

Generating an invoice for an event registration

You can perform a remote procedure call to generate or regenerate an invoice for an event registration.

Required scope: event_registrations_edit

Syntax

```
POST
{baseAPIaddress}/{version}/rpc/{accountID}/GenerateInvoiceForEventRegistration?event
RegistrationId={eventRegistrationID}&updateIfExists=true/false
```

where *eventRegistrationsID* is the unique identifier of an event registration returned by the EventRegistrations API call, and *updateIfExists* is an optional parameter. If updateIfExists=true, then the invoice will be regenerated if it already exists. If updateIfExists=false and the invoice already exists, then *Bad request* will be returned.

Example

```
POST
https://api.wildapricot.org/v2/rpc/58293/GenerateInvoiceForEventRegistration?eventRe
gistrationId=112745&updateIfExists=true
```

If this call is successful, it returns the ID of the new or updated invoice.

Generating an invoice for pending membership

You can perform a remote procedure call to generate or regenerate an invoice for a pending membership application, renewal, or level change. This call can only be used if the specified contact is a member with a status of Pending - New, Pending - Renewal, or Pending - Level Change.

Required scope: contacts_membership_edit

Syntax

```
POST
{baseAPIaddress}/{version}/rpc/{accountID}/GenerateInvoiceForPendingMembership?conta
ctId={contactID}&updateIfExists=true/false
```

where *contactID* is the unique identifier of a contact, and *updateIfExists* is an optional parameter. If updateIfExists=true, then the invoice will be regenerated if it already exists. If updateIfExists=false and the invoice already exists, then *Bad request* will be returned.

Example

```
POST
https://api.wildapricot.org/v2/rpc/58293/GenerateInvoiceForPendingMembership?contact
Id=402784&updateIfExists=true
```

If this call is successful, it returns the ID of the new or updated invoice.

Approving a pending membership

You can perform a remote procedure call to approve a pending membership application, renewal, or level change. The membership will be activated and all associated actions – such as sending an activation email, changing the renewal due, etc. – will be performed.

This call can only be used if the specified contact is a member with a status of Pending - New, Pending - Renewal, or Pending - Level Change.

Required scope: contacts_membership_edit

Syntax

```
POST
{baseAPIaddress}/{version}/rpc/{accountID}/ApprovePendingMembership?contactId={conta
ctID}
```

where *contactID* is the unique identifier of a contact.

Example

```
POST
https://api.wildapricot.org/v2/rpc/58293/ApprovePendingMembership?contactId=402784
```

Rejecting a pending membership

You can perform a remote procedure call to reject a pending membership application, renewal, or level change. This call can only be used if the specified contact is a member with a status of Pending - New, Pending - Renewal, or Pending - Level Change.

Required scope: contacts_membership_edit

Syntax

```
POST
{baseAPIaddress}/{version}/rpc/{accountID}/RejectPendingMembership?contactId={contac
tID}
```

where *contactID* is the unique identifier of a contact.

Example

```
POST
https://api.wildapricot.org/v2/rpc/58293/RejectPendingMembership?contactId=402784
```

On this page:

See also:

- API V2 authentication
- API V2 calls

Batch API requests

Batch API requests

Multiple API requests can be combined in a single batch request. The client application should make a BATCH or POST request to https://api.wildapricot.org/batch and pass a collection of requests in the request body using the following parameters.

Parameters

The following parameters are used for each individual request within the batch request:

Variable	Description
ID	Individual request identifier. Must be unique within the batch request.
Order	Number controlling the order in which the requests are processed, from lowest to the highest.
PathAndQuery	The path and query of the API relative to https://api.wildapricot.org.
Method	The request method. Options are GET, POST, PUT, DELETE.
Payload	Data for POST or PUT requests.
ContentType	The data type for Payload.

Each API call must include an authentication token that authenticates your account and prevents others from accessing your data. For more information, see API V2 authentication.

Example

```
BATCH https://api.wildapricot.org/batch
[
  {
    "Id": "get all available accounts",
    "Order": 0,
    "PathAndQuery": "/v2/accounts",
    "Method": "GET"
  },
  {
    "Id": "create new contact",
    "Order": 1,
    "PathAndQuery": "/v2/accounts/123/contacts",
    "Method": "POST",
    "Payload": "{\"FirstName\":\"John\"}",
    "ContentType": "application/json"
  },
  {
    "Id": "try to delete account",
    "Order": 0,
    "PathAndQuery": "/v2/accounts",
    "Method": "DELETE",
    "Payload": null,
    "ContentType": null
  },
  {
    "Id": "try to open external url",
    "Order": 0,
    "PathAndQuery": "http://ya.ru",
    "Method": "DELETE",
    "Payload": null,
    "ContentType": null
  }
]
```

Response fields

The batch request returns the following information for each individual request.

Field	Description
ResultId	The request identifier.
HttpStatusCode	The status code of the response. For a complete list, see API V2 status codes.
HttpReasonPhrase	A short description of the status code.
ResponseData	The response content in JSON or XML format.

Each request is processed independently, so if one request fails, others can still be processed successfully.

Sample response


```
[
  {
    "RequestId": "try to open external url",
    "HttpStatusCode": 400,
    "HttpReasonPhrase": "Request path does not look like valid API request",
    "ResponseData": null
  },
  {
    "RequestId": "try to delete account",
    "HttpStatusCode": 405,
    "HttpReasonPhrase": "Method Not Allowed",
    "ResponseData": "{\"Message\":\"The requested resource does not support http
method 'DELETE'.\"}"
  },
  {
    "RequestId": "get all available accounts",
    "HttpStatusCode": 200,
    "HttpReasonPhrase": "OK",
    "ResponseData":
"[{\"PrimaryDomainName\":\"wa.local\",\"Resources\":[{\"Name\":\"Contacts\",\"Url\":
\"https://api.wildapricot.org/v2/accounts/1/Contacts/\",\"AllowedOperations\":[\"GET
\",\"POST\",\"PUT\"]},{\"Name\":\"Membership
levels\",\"Url\":\"https://api.wildapricot.org/v2/accounts/1/MembershipLevels/\",\"A
llowedOperations\":[\"GET\"]},{\"Name\":\"Contact
fields\",\"Url\":\"https://api.wildapricot.org/v2/accounts/1/ContactFields/\",\"Allo
wedOperations\":[\"GET\"]},{\"Name\":\"Member
groups\",\"Url\":\"https://api.wildapricot.org/v2/accounts/1/MemberGroups/\",\"Allow
edOperations\":[\"GET\"]},{\"Name\":\"Saved
searches\",\"Url\":\"https://api.wildapricot.org/v2/accounts/1/SavedSearches/\",\"Al
lowedOperations\":[\"GET\"]},{\"Name\":\"Bundles\",\"Url\":\"https://api.wildapricot
.org/v2/accounts/1/Bundles/\",\"Description\":\"Requires levelId query string
parameter.\",\"AllowedOperations\":[\"GET\"]},{\"Name\":\"Invoices\",\"Url\":\"https
://api.wildapricot.org/v2/accounts/1/Invoices/\",\"Description\":\"Requires
contactId or eventId query string
parameter.\",\"AllowedOperations\":[\"GET\"]},{\"Name\":\"Payments\",\"Url\":\"https
://api.wildapricot.org/v2/accounts/1/Payments/\",\"Description\":\"Requires
contactId query string
parameter.\",\"AllowedOperations\":[\"GET\",\"POST\",\"DELETE\"]},{\"Name\":\"Refund
s\",\"Url\":\"https://api.wildapricot.org/v2/accounts/1/Refunds/\",\"Description\":\
"Requires contactId query string
parameter.\",\"AllowedOperations\":[\"GET\"]},{\"Name\":\"Payment
```

```
allocations\",\"Url\":\"https://api.wildapricot.org/v2/accounts/1/PaymentAllocations
/\",\"Description\":\"Requires paymentId or invoiceId query string
parameter.\",\"AllowedOperations\":[\"GET\"]},{\"Name\":\"Tenders\",\"Url\":\"https:
//api.wildapricot.org/v2/accounts/1/Tenders/\",\"AllowedOperations\":[\"GET\"]},{\"N
ame\":\"Events\",\"Url\":\"https://api.wildapricot.org/v2/accounts/1/Events/\",\"All
owedOperations\":[\"GET\"]},{\"Name\":\"Event
registrations\",\"Url\":\"https://api.wildapricot.org/v2/accounts/1/EventRegistratio
ns/\",\"Description\":\"Requires contactId or eventId query string
parameter.\",\"AllowedOperations\":[\"GET\",\"POST\",\"PUT\",\"DELETE\"]}],\"Localiz
ation\":{\"DateFormat\":\"dd\\\".\\\"MM\\\".\\\"yyyy\",\"TimeFormat\":\"HH:mm\"},\"C
urrency\":{\"Name\":\"US
Dollar\",\"Code\":\"USD\",\"Symbol\":\"$\"},\"Id\":1,\"Url\":\"https://api.wildapric
ot.org/v2/Accounts/1\",\"Name\":\"Version 4.4
WIP\",\"ContactLimitInfo\":{\"CurrentContactsCount\":1420,\"BillingPlanContactsLimit
\":2000}}]"
  },
  {
    "RequestId": "create new contact",
    "HttpStatusCode": 200,
    "HttpReasonPhrase": "OK",
```

```
    "ResponseData": "{\"Id\":123456, \"FirstName\":\"John\"}"
  }
]
```

On this page:

- Parameters
- Example
- Response fields
- Sample response

See also:

- API V2 authentication
- API V2 calls

API V2 status codes

API V2 status codes

Along with the results of an API call, Wild Apricot's API returns a status code indicating the state of the requested operation. The status codes are standard HTTP status codes and include the following.

Code	Description
200	Wild Apricot's server has successfully responded to the request.
304	You have requested previously supplied information, so the information is being returned from the cache rather than the server.

<table>
<tr><td>400</td><td>Wild Apricot's server did not understand the request. You may be missing required parameters, you may have specified invalid data, you may have used improper syntax in your $filter or $select paramet ers, or the billing plan's contact limit may have been reached. The response body will contain the following fields.
<table>
<tr><th>Field</th><th>Description</th></tr>
<tr><td>Code</td><td>One-word summary of the error (e.g. Validation)</td></tr>
<tr><td>Message</td><td>A high-level description of the error.</td></tr>
<tr><td>Details</td><td>The field name, value, and specific violation that caused the error.</td></tr>
</table>
Example:
<pre>
HTTP 400 Bad request
{
    code:"Validation",
    message:"Contact details
validation error.",
    details:[
  {
   key:"Email",

value:"someinvalid@valueforemail.comc
om",
   restriction:"Invalid email
address."
  },
  {
   key:"Country of origin",
   value:"USSA",
   restriction:"Unexpected option."
  },

 ]
}
</pre></td></tr>
<tr><td>401</td><td>The API key required to authenticate your account was either not provided or not valid.</td></tr>
<tr><td>403</td><td>Your authentication information was correct, but access to requested resource is denied, possibly because the resource ID you provided was not valid.</td></tr>
<tr><td>404</td><td>The resource you are trying to access either does not exist or is not available.</td></tr>
<tr><td>404.14</td><td>Your API call is too long for the server to process. The maximum query length is 4096 characters.</td></tr>
<tr><td>429</td><td>Wild Apricot's server has received too many requests from your account. Currently, accounts are limited to a certain number of requests per minute to avoid overall system slowdown.</td></tr>
</table>

500	Wild Apricot's server has encountered an error and cannot fulfill the request.
503	Wild Apricot's server is currently unavailable because it is overloaded or down for maintenance.

API V2 browser

API V2 browser

To use the API browser, enter your API key in the **API key** field, or enter your account administrator's email and password, then click the **Load** bu tton.

You can use the tabs that appear to switch between the JSON and XML results. Within the JSON results, you can click the links to execute the available API calls. Alternatively, you can enter the API call URL into the field below then click **GO**.

Sample API V2 applications

Sample API V2 applications

PHP application

A sample PHP application is available that retrieves the names of the first 10 members and displays them on an HTML page. To view the code for this application, click here.

Python application

A sample Python application is available that:

- downloads account information
- downloads 10 active members and prints their details
- creates a new contact
- archives the new contact

The application consists of two files: WaApy.py, which communicates with Wild Apricot's API, and ApiTest.py, the demo application that performs the above functions. To view these files, click here.

Visual Studio project

A sample Visual Studio project is available that performs the following functions using Version 2 of Wild Apricot's API.

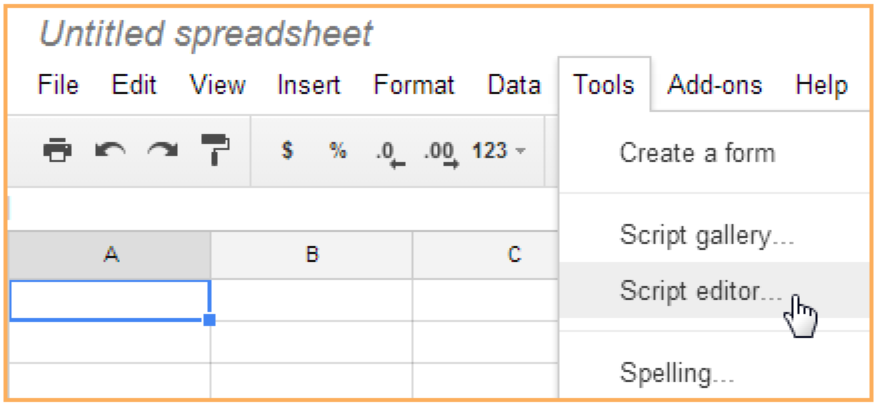
- create new contact
- update the contact
- get list of events
- create new event registration
- create payment for the registration
- delete payment
- delete registration
- delete contact

The Visual Studio project is written in C# and uses the Newtonsoft.Json assembly. To view the code for this project, click here.

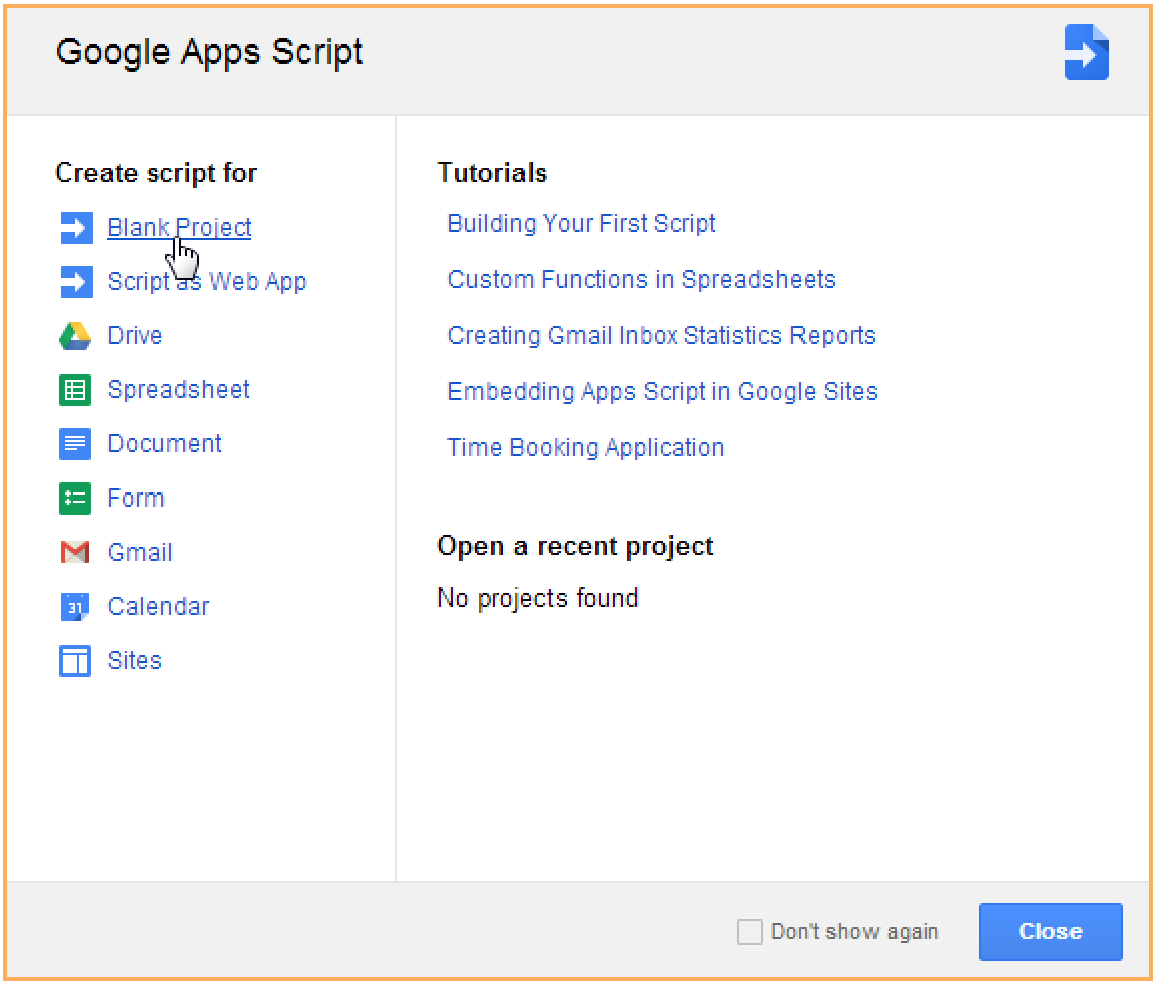
Google Spreadsheet application

You can set up a Google Spreadsheet to retrieve and update information from your Wild Apricot database using Wild Apricot's API. To set up a sample spreadsheet that retrieves account details, follow these steps:

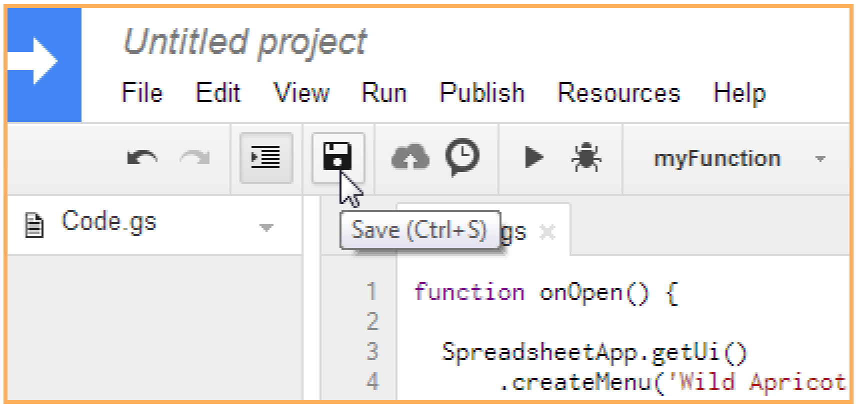
1. Within Google Drive, create a new spreadsheet.
2. Click the **Tools** menu and select the **Script editor** option.



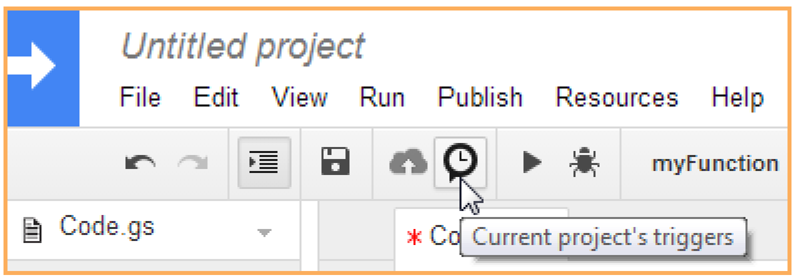
3. Select the option to create a blank project.



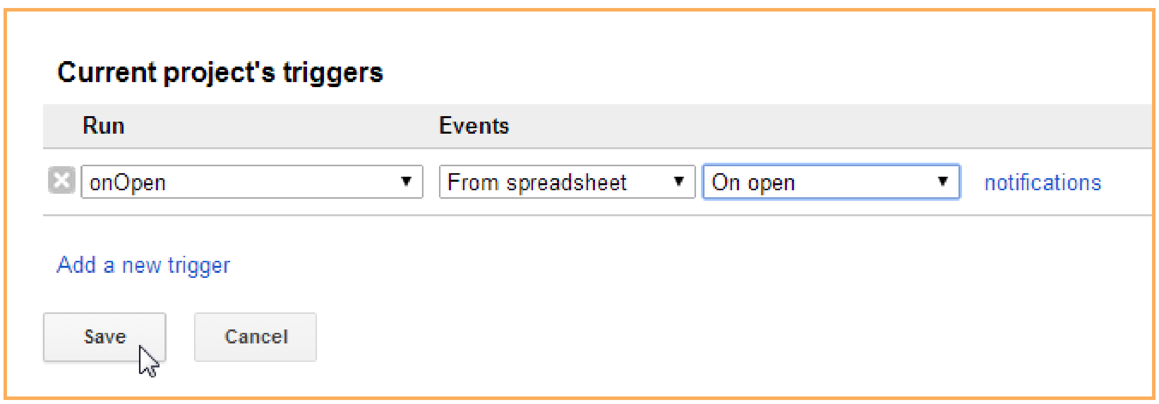
4. Copy the sample code and paste it in place of the sample code within the script editor. The sample code retrieves account details but can be modified to perform any function supported by Wild Apricot's API.
5. Save the project.



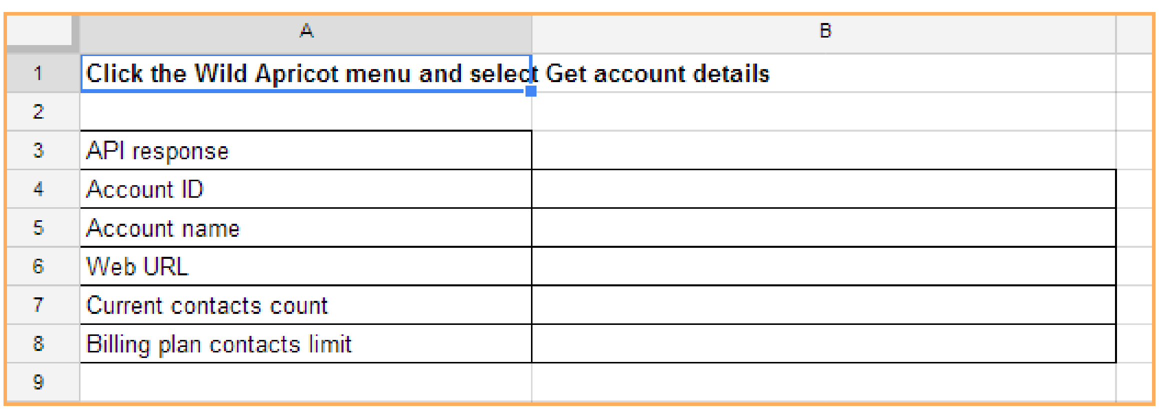
6. Click the icon to open the current project's triggers.



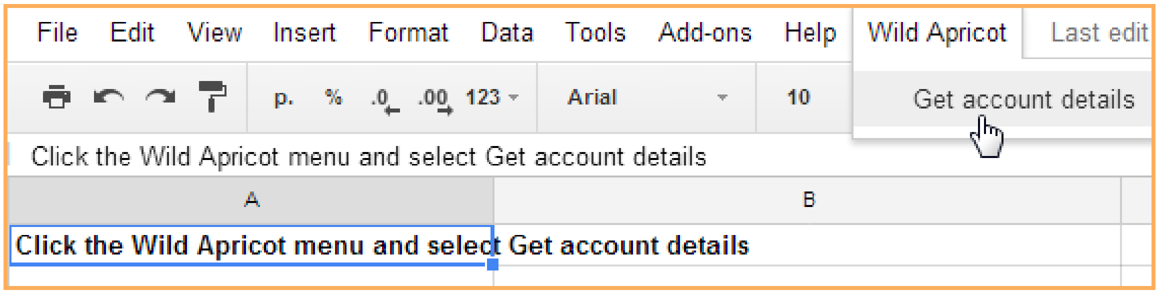
7. Set up and save the following trigger.



8. Close your Google spreadsheet and open it again.
9. Enter the following field labels.



10. Click the **Wild Apricot** menu and select **Get account details**.



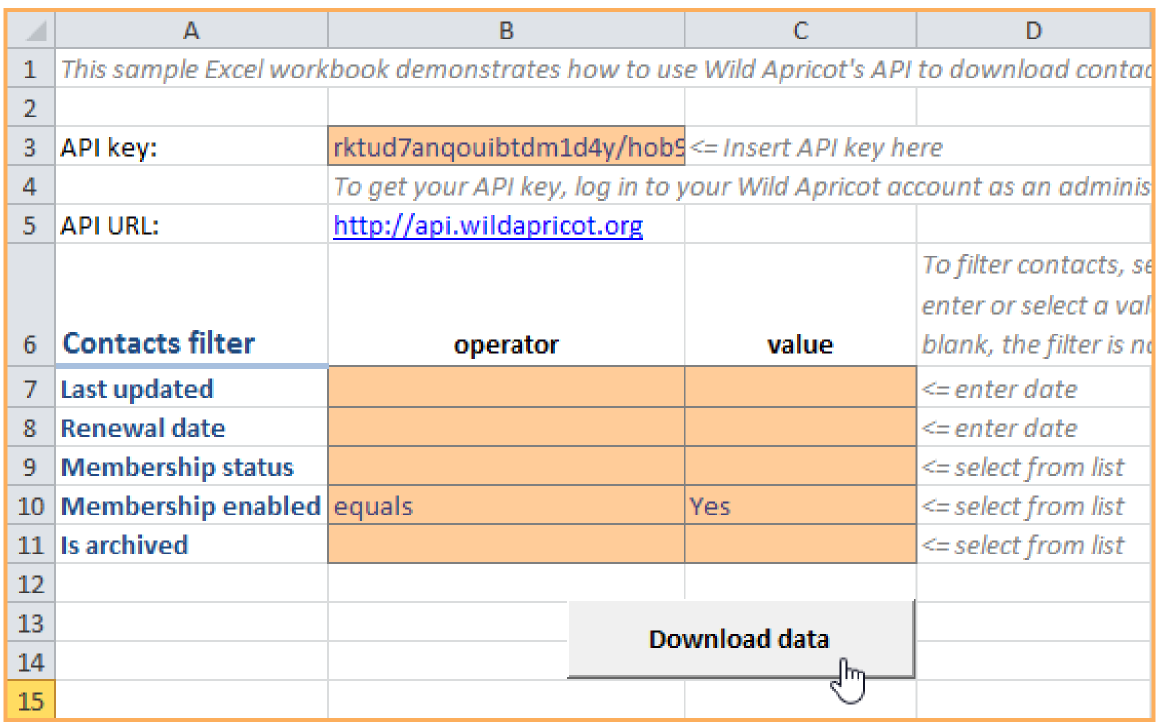
Excel spreadsheet

To help get you started with Wild Apricot's API, we have provided a sample Windows Excel file that uses API calls – programmed with Visual Basic – to download contact records and other information from a Wild Apricot account. The Excel file provides parameters that you can set to filter the results. You can use this file as is without any further programming or you can modify it according to your organization's requirements.

To download the sample Excel file, click here.

To retrieve contact records using the supplied Excel file, follow these steps:

1. Log into your Wild Apricot account as an administrator, find your API key, and copy it to the clipboard.
2. Open the Excel file in Excel. If you encounter errors opening the file, enable macros for this file or in your Excel options.
3. On the **Settings** tab, paste your API key into the **API key** field.
4. Click the **Download data** button.



The following information will be downloaded:

- Account information will now appear on the Settings tab.
- Contact and membership fields will be downloaded to the Fields tab.
- Membership levels will appear on the Levels tab.
- Contact records will be downloaded to the Contacts tab.
- Pivot charts will appear on the Sample Report tab displaying the number of contacts for each combination of membership level and status.

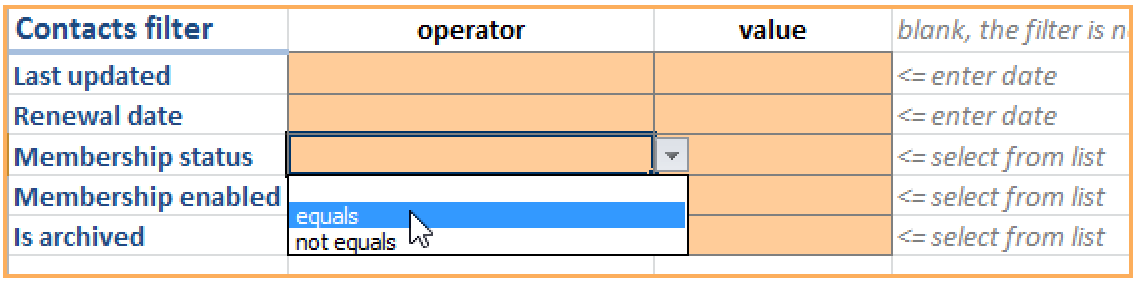
Filtering the search results

You can filter the search results so that only selected records are downloaded. You can filter the records by the following criteria:

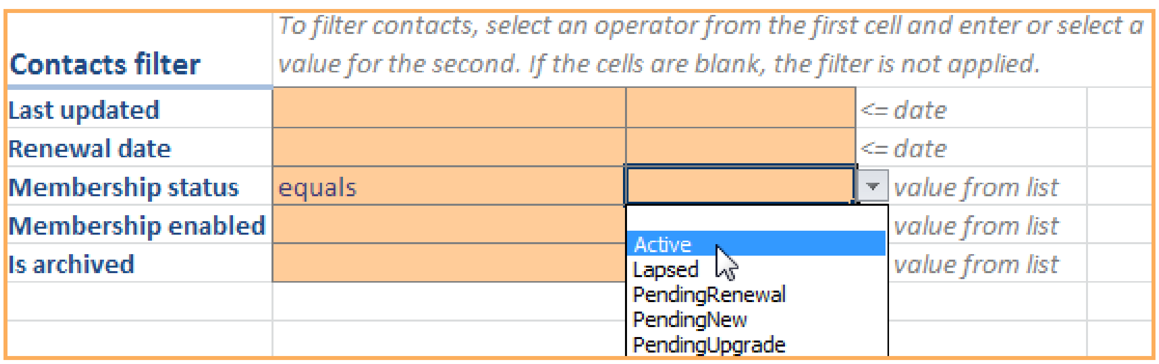
Last update – the date the contact record was last updated
Renewal date – the date the contact's membership was last renewed
Membership status – the status of the contact's membership
Membership enabled – whether the contact is a member
Is archived – whether the contact is archived

To filter the search results so that only selected records are downloaded, follow these steps:

1. Click the **operator** cell beside the filter criteria you want to use and select an operator from the list.



2. Select a value from the **value** cell. Do not type the value yourself. The value will be combined with the operator to form the search criteria. For example, to retrieve only records with an active membership status, you would select the **equals** operator and the **Active** value from the **Membership status** row.



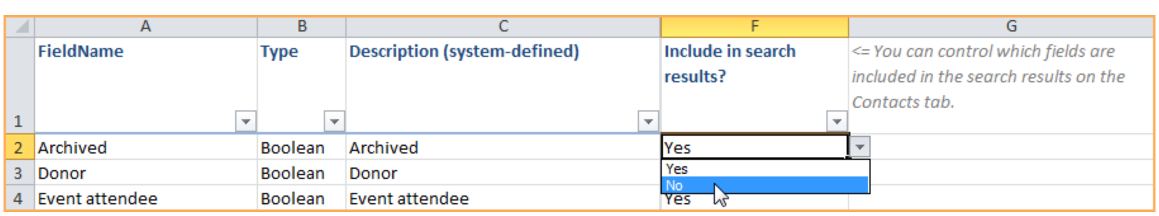
3. When you are finished setting filter criteria and ready to download your contact records, click the **Download data** button.

Your filtered results will now appear on the Contacts and the Sample Report tab.

Choosing the fields to be included

You can also control which fields are included in the search results. To do so, follow these steps:

1. After entering your API key, click the **Download data** button on the Settings tab to download your account data.
2. Click the **Fields** tab.
3. From the Fields tab, you can prevent fields from being included in the results by clicking the cell under the **Include in search results?** heading and selecting **No** from the list.



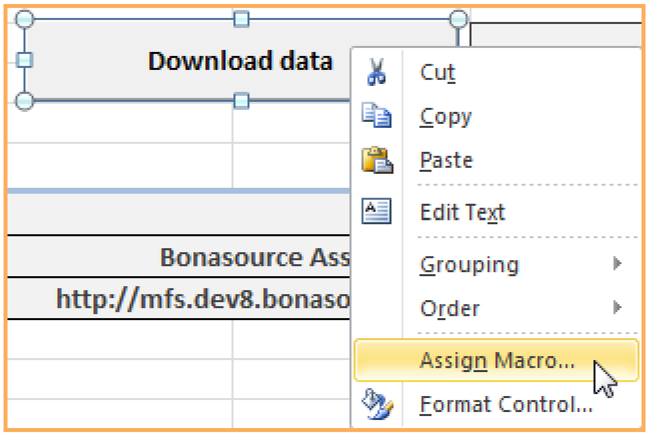
4. After you have chosen the fields to be included in the search results, return to the Settings tab.
5. Click the **Download data** button again.

Your search results will now be displayed on the Contacts tab using only the selected fields.

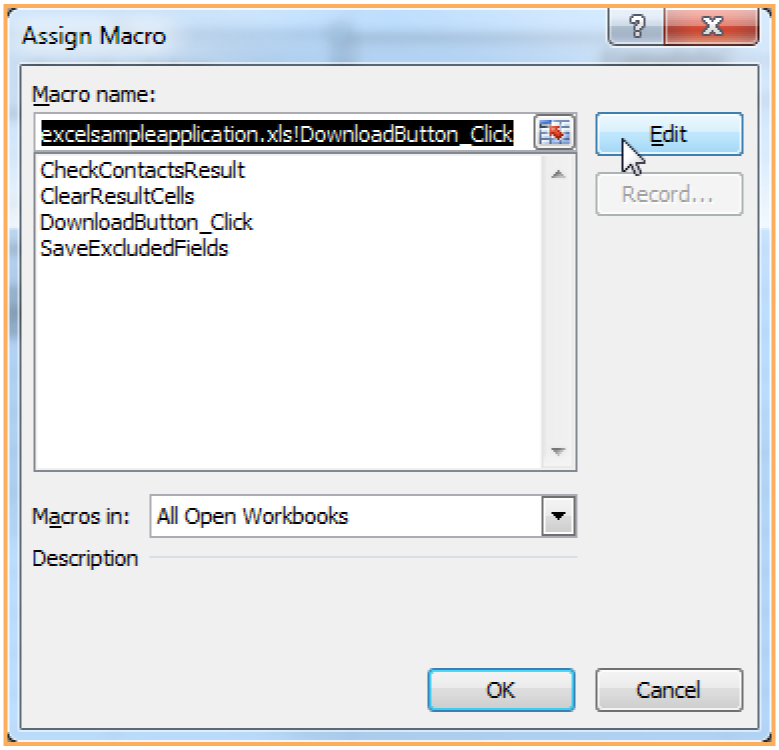
Viewing the sample code

To view the sample code triggered by the **Download data** button, follow these steps:

1. Right click over the **Download data** button.
2. Select the **Assign Macro** option from the dialog that appears.



3. From the Assign Macro screen, select the DownloadButton macro and click the **Edit** button.



Visual Basic for Applications will open, and display the DownloadButton macro.

On this page:

- PHP application
- Python application
- Visual Studio project
- Google Spreadsheet application
- Excel spreadsheet
    - Filtering the search results
    - Choosing the fields to be included
    - Viewing the sample code

Single sign-on service

Single sign-on service

> ⚠ Wild Apricot's single sign-on service is intended for use by developers with technical expertise. If you need assistance, we provide support via email or through our Developers forum.

Using Wild Apricot's single sign-on service, you can integrate an external site – like your Joomla or Drupal site – with your Wild Apricot site. With single sign-on implemented, your members can log into both sites using their Wild Apricot credentials, and you can restrict content on your external site to Wild Apricot members.

The single sign-on service was initially developed to support integration with WordPress, but can be used with any site that supports server-side code.

All interactions between external applications and Wild Apricot accounts take place using Wild Apricot's API.

> ⚠ Wild Apricot's single sign-on service uses secure access via HTTPS. Custom domains without SSL certificates will encounter problems integrating Wild Apricot with other sites. You can either purchase a SSL certificate or set your wildapricot.org domain as your primary domain.

Authorizing external applications

All external sites that access Wild Apricot's API must be registered as an authorized application. For instructions, see Authorizing external applications.

Obtaining an authentication token

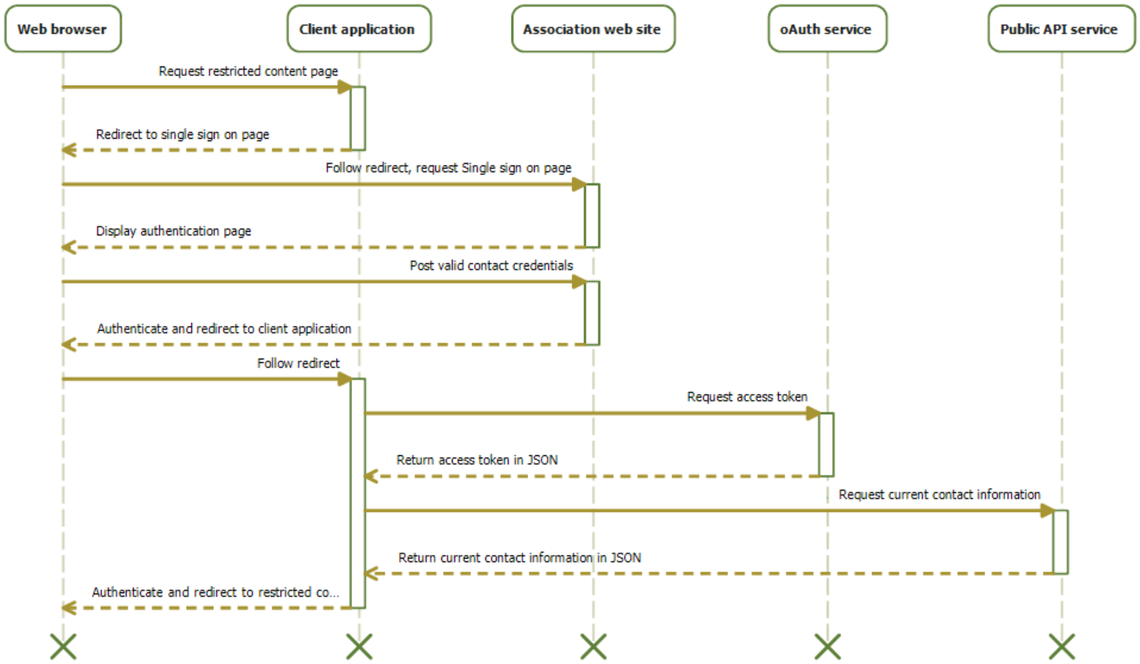
Calls to Wild Apricot's API must include an authentication token that authenticates your Wild Apricot account and prevents others from accessing your data. Requests for authentication tokens are sent to an OAuth server.

Within the single sign-on scenario, an authentication token is obtained in the following manner:

Read more/less

1. A Wild Apricot user clicks the Login button for single sign-on.
2. An external site redirects the browser to Wild Apricot's single sign-on form.
3. The Wild Apricot user enters their credentials and clicks the Login button.
4. If the user's credentials are authenticated, the form returns an authorization code.
5. The authorization code is used to request an authentication token from oAuth.
6. If the request is valid, oAuth returns an authentication token.

These steps are illustrated in the following diagram and described in more detail below.



The following roles appear on the diagram:

Role	Description
Web browser	The browser being used by the Wild Apricot user
Client application	The external site that you want to integrate with your Wild Apricot account
Association website	Your Wild Apricot website
oAuth service	The OAuth authentication service
WA public API	Wild Apricot's API

Requesting Wild Apricot authentication

The first stage in the process of obtaining an authentication token is initiated when the Wild Apricot user attempts to view content that requires Wild Apricot authentication. This stage involves the following steps:

Read more/less

1. The Wild Apricot user accesses a page with restricted content and is prompted to log in.
2. The external site builds a URL and returns a HTTP 302 Redirect to **https://*yourWildApricotsite*/sys/login/OAuthLogin** where **https://*yourWildApricotsite*** is the URL of your Wild Apricot site. The following parameters should be passed as query string arguments :

Parameter	Description
client_id	The identifier of the client application. Obtained when you register the external site as an authorized application.
redirect_uri	URL to which the user will be redirected after login. The URL you specify must be included in the **Trusted redirect domains** list within the authorized application details.
scope	Should be set to **contacts_me**. Currently, any other scope value will result in an error.

state	Optional parameter: any value you need to track the request.

Authenticating the user

The next stage is authenticating the Wild Apricot user, and involves the following steps:

Read more/less

1. The browser follows the redirect to Wild Apricot's single sign-on screen.
2. If the query string parameters are valid, the screen is displayed to the user.
3. On Wild Apricot's single sign-on screen, the Wild Apricot user enters their username and password.
4. The single sign-on service checks the user's credentials.
5. If the credentials are valid, the service sets the authentication cookie, builds an URL, and returns a HTTP 302 Redirect. The URL is based on the **redirect_uri** parameter specified above, and includes **authorization_code** and **state** values as query string arguments.

Requesting the authentication token

The final stage is the authentication token request, and involves the following steps:

Read more/less

1. The browser follows the redirect from the single sign-on service.
2. The external site requests an authentication token from the oAuth service. The following parameters should be passed in the POST request with content type set to **application/x-www-form-urlencoded**:

Parameter	Description
grant_type	Should be set to **authorization_code**.
code	The authorization code returned by Wild Apricot's single sign-on service.
client_id	The identifier of the client application. Obtained when you register the external site as an authorized application.
redirect_uri	Must match the URL specified in the initial Wild Apricot authentication request. (This is done to double check the URL and prevent the request from being hijacked.)
scope	Must match the URL specified in the initial Wild Apricot authentication request.

The client_id and client_secret should be passed in the authorization header, delimited by colon and base64 encoded. The authorization scheme is Basic.

Example

```
POST http://oauth.wildapricot.org/auth/token
Authorization: Basic Y2xpZW50X2lkOmNsaWVudF9wYXNzd29yZA==
grant_type=authorization_code&code=09827394752790347&client_id=CLIENT_ID&re
direct_uri=http://callback.yourdomain.com&scope=contacts_me
```

3. The oAuth service returns the authentication token in JSON format. The token can now be used in Wild Apricot API calls. For more information on the authentication response, click here.

Logging out from single sign-on

To log out a user from the external site and their Wild Apricot account, the external site must take the following steps:

Read more/less

1. The external site sends a POST request to **/sys/login/logoutnonce** on their Wild Apricot site. The request should include the following parameters:

Parameter	Description
token	Valid oAuth token
email	Email of logged in user
redirectUrl	URL to which the user will be redirected after logging out

2. The Wild Apricot site returns a JSON structure with a one-time nonce code.
3. The external site redirects the user to /sys/login/logout on their Wild Apricot site and includes the nonce code in request as a query string parameter..
4. The Wild Apricot site checks the nonce code, removes the authentication cookie, and redirects the user to the specified **redirect Url**.

On this page:

Expand all sections

See also:

- Open source Wild Apricot authentication plugin for Discourse

Adding Wild Apricot functionality to other websites

Adding Wild Apricot functionality to other websites

You can use a widget – aka plugin – to embed Wild Apricot functionality into another website. When you embed a widget, Wild Apricot becomes an invisible provider of interactive functionality for your other website.

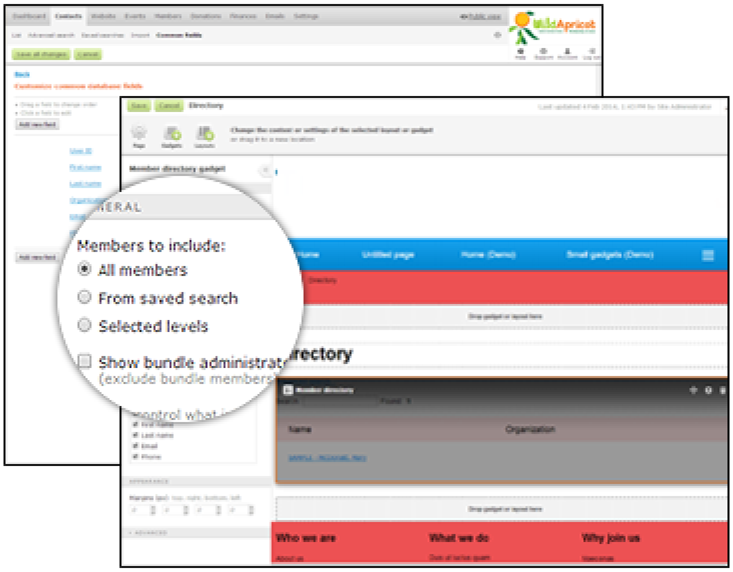
For example, you can embed an event list widget to display the event calendar from your Wild Apricot site on another site of yours that does not support event registration. Or, you can embed a member profile widget to allow members to log in and modify their profile from another site.

You can embed Wild Apricot widgets into any site uses HTML or accepts HTML-based widgets, including sites set up using Wix and Joomla.

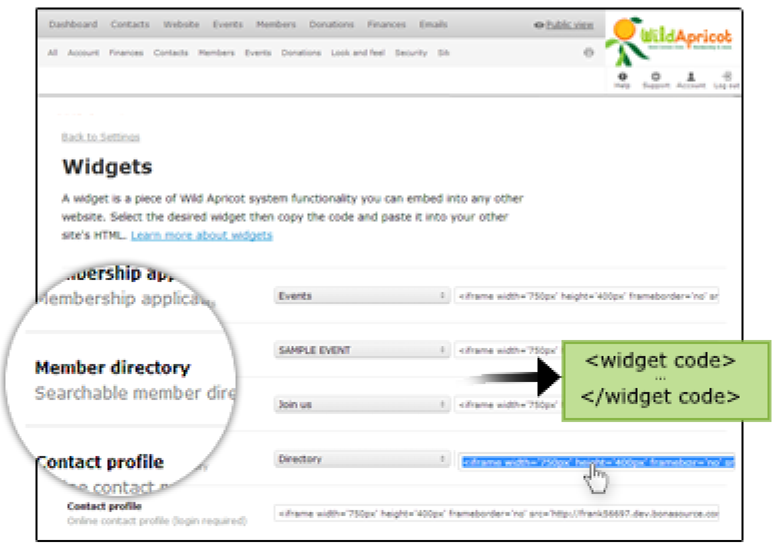
Embedding a Wild Apricot widget into another website

To embed a Wild Apricot widget into another website, you:

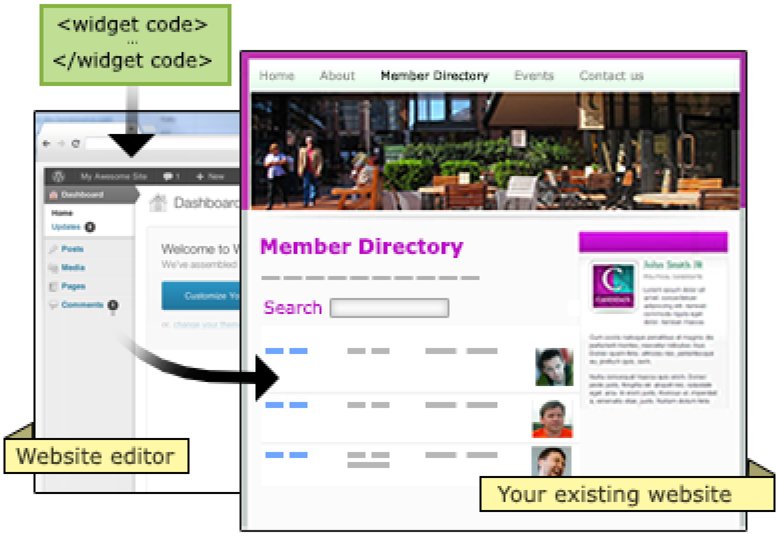
1. Add the corresponding gadget to a page in Wild Apricot.



2. Copy the embed code for the widget. (For instructions on getting the widget code, click here.)



3. Paste the embed code into your other site's HTML code.



Available widgets

A widget is available for many Wild Apricot gadgets. The event list widget, for example, corresponds to the event calendar gadget.

To embed a Wild Apricot widget in another website, you need to create and set up the corresponding gadget on a page in your Wild Apricot account. For example, if you want to embed your Wild Apricot event calendar on another site, you must have already set up a publicly accessible event calendar gadget on a page on your Wild Apricot site.

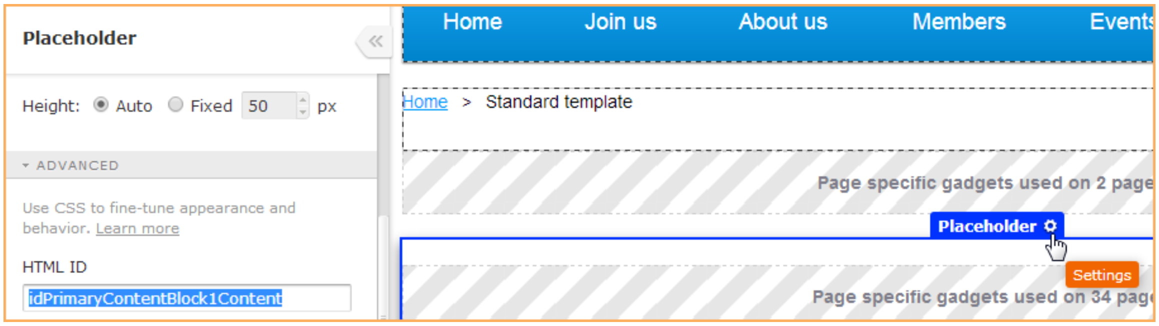
The following widgets are available:

Widget	Description
Event list	Displays your event calendar – a list of current and past events from your Wild Apricot events database. Visitors can proceed to the details page for a particular event.
Event details	Displays the details for a specific event from your event calendar. Visitors can register for the event and pay the registration fee online.
Member application	Displays an online membership application form. Visitors can apply for membership to your Wild Apricot site and pay the membership fee online.
Member directory	Displays a Wild Apricot member directory, subject to any restrictions you have set in Wild Apricot.
Contact profile	Initially displays a member login box. After logging in, a member can view and update their member profile, subject to any restrictions you have set in Wild Apricot.
Donation	Displays a Wild Apricot donation form.
Forum summary	Displays a summary of the activity in your Wild Apricot forums.
Forum	Displays a Wild Apricot forum.
Blog	Displays a Wild Apricot blog.
Subscription form	Displays an email subscription form visitors can use to sign up for emails from your Wild Apricot site.

You can also add Wild Apricot login boxes to another site.

What gets displayed?

A widget doesn't display the entire page on which the corresponding gadget appears. Instead, it displays any and all content within the placeholder on the page that has an HTML ID of **id_Content** for Treehouse, Clean Lines, White Space, and Dark Impact themes, and **idPrimaryContentBlock1Content** for all other themes. To view the HTML ID of the placeholders on your page, begin editing its page template, then display the placeholder settings and expand the Advanced section, where the HTML ID setting can be found.



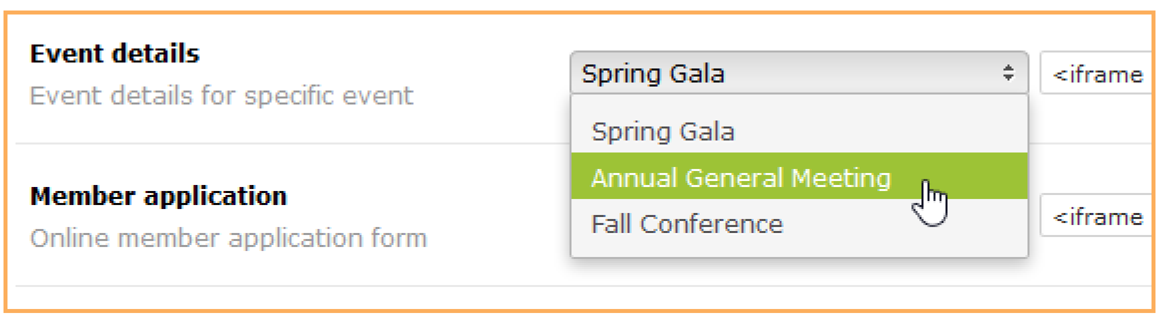
While editing a page containing the gadget you plan to use as the basis for a widget on another website, be careful not to move any content you want to appear within the widget outside that placeholder.

If you embed content that is restricted to members only, or to certain membership levels, the widget will prompt the visitor to log in to view the content.

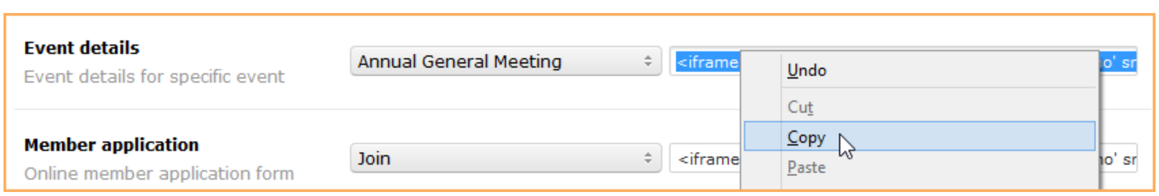
Getting the widget code

To obtain the code you need to embed a Wild Apricot widget on another website, follow these steps:

1. Click the **Settings** menu.
2. Within the **Widgets** section, click **Widgets code**.
3. On the Widgets screen, click within the code beside the name of the widget you want to embed. If you have multiple items of the same kind – events, forums, member directories, etc. – then choose the item before clicking within the code. For example, to embed the event details for a specific event, choose the event from the list.



4. Right click over the selected code and copy the code to the clipboard.



You can now paste the copied embed code into the HTML code for the page on your other website.

If the page where you're embedding the widget uses *https* rather than *http*, then you need to adjust the element within the embed code that begins *src='http://* to *src='https://*.

Modifying the iframe's height, width, and border

For each widget, you can change the height, width, and border of the *iframe* in which the widget is displayed by modifying the widget code.

In the following example...

```
<iframe width='750px' height='400px' frameborder='no'
src='http://stevelivetestsite.wildapricot.org/widget/join'
onload='tryToEnableWACookies("https://stevelivetestsite.wildapricot.org");'
></iframe><br/><font style='color:#ccc;font-size:9px;font-family: Verdana, Arial,
Helvetica, sans-serif;'>Powered by Wild Apricot <a style='color:#ccc'
href='http://www.wildapricot.com/features' target='_blank'>Membership
Software</a></font><script  type="text/javascript" language="javascript"
src="https://stevelivetestsite.wildapricot.org/Common/EnableCookies.js" ></script>
```

...you could change the width from 750 pixels to 475 pixels by changing *width='750px'* to *width='475px'*.

The widget itself will not be resized, only the frame in which the widget appears. If necessary, scroll bars will appear to allow visitors to view the rest of the widget content.

> For instructions on changing the actual width of the widget using CSS code, see Changing the widget width.

Similarly, you can change height of the iframe by modifying the *height* parameter, and control whether a border appears around the iframe by changing the *frameborder* to *yes* or *no*.

Changing colors and fonts

To customize your embedded Wild Apricot widget so that it appears like a seamless part of your other website, you modify the appearance of the corresponding gadget – and the placeholder in which it appears – on your Wild Apricot site. You can indirectly modify the appearance of the widget by choosing a different website theme, customizing the theme's colors and styles, and for more advanced fine-tuning, using CSS customization. Any changes you make will apply to your Wild Apricot site pages as well as your embedded Wild Apricot widgets.

Embedding other pages as widgets

In addition to the gadget widgets listed above, you can embed any publicly accessible web page from your Wild Apricot account as a widget on another website.

To do so, copy and paste the code below, replacing *pageURL* with the URL of the page you want to embed, and *http://yoursite.wildapricot.org* with the domain name of your Wild Apricot site.

```
<iframe width='750px' height='400px' frameborder='no'
src='http://yoursite.wildapricot.org/widget/pageURL'
onload='tryToEnableWACookies("http://yoursite.wildapricot.org");'
></iframe><br/><font style='color:#ccc;font-size:9px;font-family: Verdana, Arial,
Helvetica, sans-serif;'>Powered by Wild Apricot <a style='color:#ccc'
href='http://www.wildapricot.com/features' target='_blank'>Membership
Software</a></font><script  type="text/javascript" language="javascript"
src="http://yoursite.wildapricot.org/Common/EnableCookies.js" ></script>
```

Setting up a Wild Apricot member-only portal on another website

Using widgets, you can set up a member-only portal on another non-Wild Apricot site. The main portal page could link to several member-only pages, all appearing on the other site.

To set up a Wild Apricot member-only portal on another website, follow these steps:

1. Within Wild Apricot, create the main portal page and restrict access to it to the appropriate membership levels.
2. Create the other pages to be included in the portal and assign the same access restrictions.
3. Edit the main portal page and add links to each of the other portal pages.
4. Copy the embed code for the main portal page and paste it into the HTML of a page on your other website. For instructions on

copying the embed code for individual Wild Apricot pages, see Embedding other pages as widgets (above).

Widgets and third-party cookies

When people visit a site that embeds Wild Apricot functionality using widgets, Wild Apricot places a cookie on the visitor's device to recognize the device in the future. In this case, Wild Apricot is considered to be a third-party site by your visitors' browsers. If visitors to your non-Wild Apricot site have third-party cookies completely disabled in their browser, they will not be able to view or access your embedded widget(s).

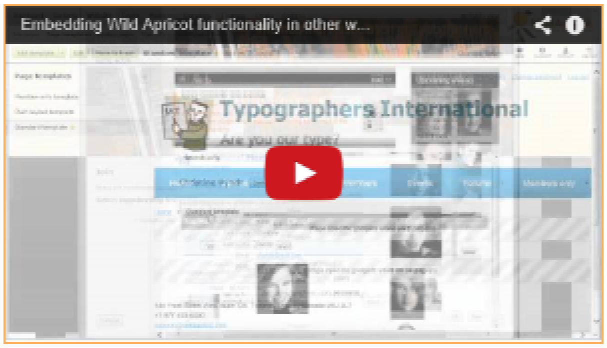
If third-party cookies are disabled for unvisited sites only, you can copy the latest widget code from Wild Apricot to provide access to your widgets. The new widget code allows visitors who have blocked third-party cookies from unvisited sites to receive cookies by first redirecting them to your Wild Apricot site – making it a visited site – before returning them to your other site that contains the Wild Apricot widget(s).

Widget code copied before June 27, 2013 requires third-party cookies to be enabled for all sites.

By default, Safari blocks third-party cookies, while Firefox and Chrome accept them. Internet Explorer blocks third-party cookies by default but allows users to accept them from Wild Apricot and other sites. Some firewalls or browser plug-ins may affect your browser's cookies settings.

Widget limitations

- Widget code copied before June 27, 2013 requires visitors to your non-Wild Apricot site to have third-party cookies enabled in their browser. Widget code copied after that date will not work if third-party cookies are disabled for all sites.
- You cannot embed a widget on a page within the same Wild Apricot site.
- You cannot embed multiple Wild Apricot widgets on the same page.
- Clicking the **Forgot Password** link will take users to your Wild Apricot site.
- Links in forum subscription emails will take users to your Wild Apricot site.
- Social login buttons will not appear on the **Authorization required** system page when someone clicks the **Login** button from a widg et.
- Widgets are designed for use on other websites and can’t be used on your Wild Apricot website. Use gadgets instead.



Video: Embedding Wild Apricot into other websites (5:06)

On this page:

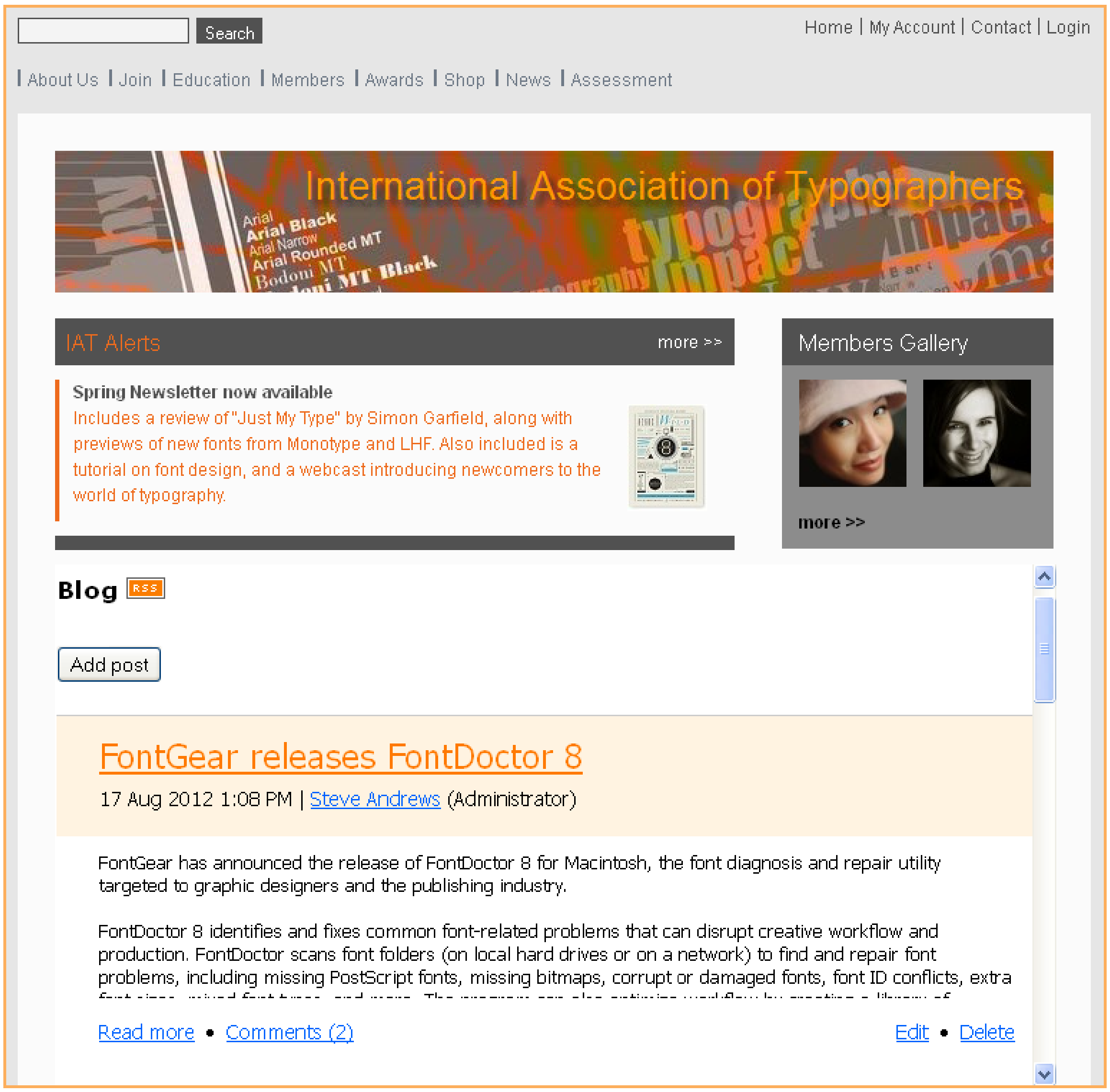
See also:

- [Integrating with WordPress]
- [Adding Wild Apricot login boxes to another site]
- [Changing the widget width]

Blog widget

Adding a blog to another website

A widget – aka plugin – is a chunk of Wild Apricot functionality that you can embed – or integrate – into another website. Using a widget, you can embed a Wild Apricot blog on another website.



To embed a widget into another website, you copy the embed code then paste it into the other site's HTML code.

Getting the widget code

To obtain the code you need to embed a Wild Apricot blog on another website, follow these steps:

1. Click the **Settings** menu.
2. Within the **Widgets** section, click **Widgets code**.
3. If you added more than one blog gadget to your Wild Apricot site, click the selection button beside **Blog** and select the blog gadget you want to embed.
4. Right click over the code that appears beside the selection button and copy the code to the clipboard.

You can now paste the copied embed code into the HTML code for the page on your other website.

Changing colors and fonts

To customize your embedded Wild Apricot widget so that it appears like a seamless part of your other website, you modify the appearance of the corresponding gadget in your Wild Apricot site. You can control the appearance of the widget by choosing a website theme, customizing the colors and styles, and for more advanced fine-tuning, using CSS customization.

For blog widgets, you can modify the following elements from the Colors and styles screen:

To change...	modify...	under...
Blog post title	Title H4 Link	Gadgets or Gadget styles (*Blueprint, Clean Lines, Dark Impact, Fiesta, Firma, Homestead, Showcase, Skyline, Terra, and White Space themes*) General formatting or Typography
Blog post author	Author Link	Blog (*Bookshelf, Building Blocks, Clean Lines, Dark Impact, Fiesta, Firma, Homestead, Showcase, Skyline, Terra, Tinted Tiles, Whiteboard, and White Space themes*) General formatting or Typography
Blog post date and time	Date and time	Blog (*Bookshelf, Building Blocks, Clean Lines, Dark Impact, Fiesta, Firma, Homestead, Showcase, Skyline, Terra, Tinted Tiles, Whiteboard, and White Space themes*)
Blog post content	Text/Normal	General formatting or Typography
Add post, Post, Add Comment, Cancel buttons	Normal/Hover	(*Clean Lines, Dark Impact, Fiesta, White Space themes*) Functional buttons
Read more, Comment, Edit, Delete links	Links Text/Normal Link	Blog (*Building Blocks, Firma, Terra, Tinted Tiles themes*) General formatting or Typography
Icons used on mobile version	Icons	Blog (*Clean Lines, Dark Impact, Fiesta, Firma, Homestead, Skyline, Terra, and White Space themes*)

Any changes you make will also be applied to blog gadgets on your Wild Apricot site pages.

Using CSS, you can:

- remove the author's name from blog
- remove administrator names from blog posts
- remove the (Administrator) designation from blog posts
- hide the RSS icon

Any changes you make will apply to your Wild Apricot site pages as well as your embedded Wild Apricot widgets.

Widget limitations

- Widget code copied before June 27, 2013 requires visitors to your non-Wild Apricot site to have third-party cookies enabled in their browser. Widget code copied after that date will not work if third-party cookies are disabled for all sites.
- You cannot embed a widget on a page within the same Wild Apricot site.
- You cannot embed multiple Wild Apricot widgets on the same page.
- Clicking the **Forgot Password** link will take users to your Wild Apricot site.
- Links in forum subscription emails will take users to your Wild Apricot site.
- Social login buttons will not appear on the **Authorization required** system page when someone clicks the **Login** button from a widg et.
- Widgets are designed for use on other websites and can't be used on your Wild Apricot website. Use gadgets instead.

On this page:

- Getting the widget code
- Changing colors and fonts
- Widget limitations

See also:

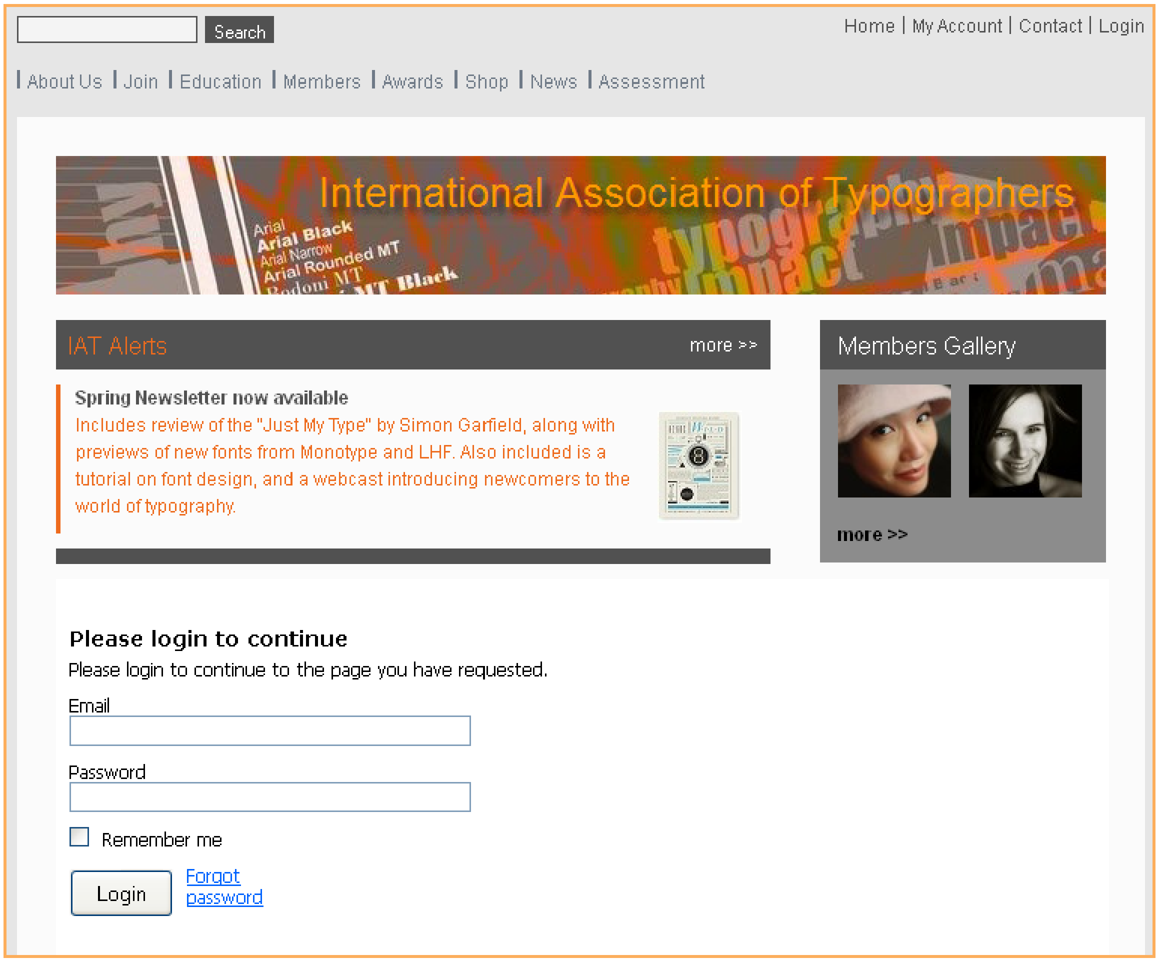
- Adding Wild Apricot functionality to other websites
- Changing the widget width
- Setting up and using blogs

Contact profile widget

Adding a contact profile to another website

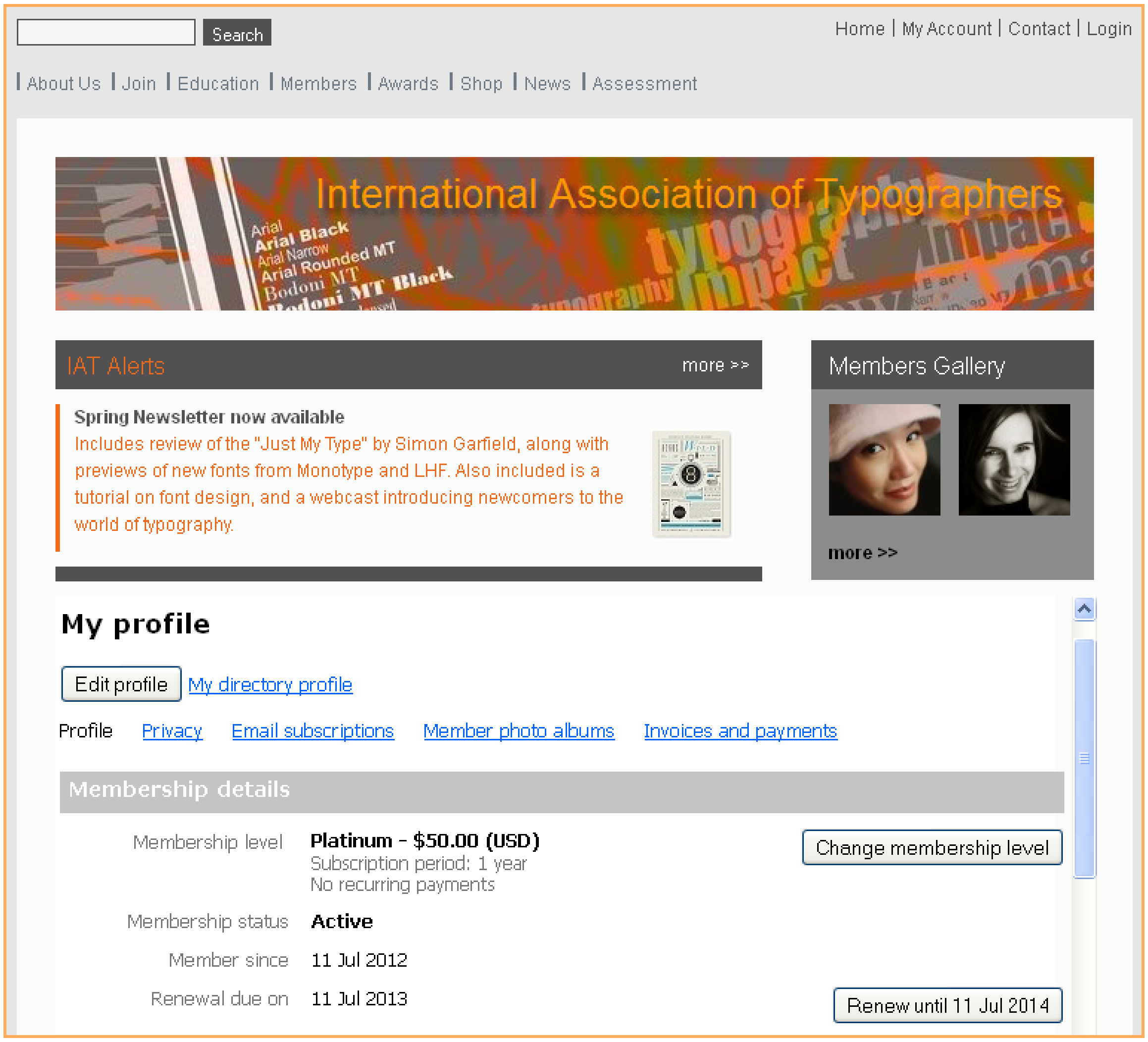
A widget – aka plugin – is a chunk of Wild Apricot functionality that you can embed – or integrate – into another website. Using a widget, you can allow members to update their Wild Apricot member profile from another website.

Initially, only a member login box appears on the other site.



The contact profile widget cannot display the social login buttons available from the Log in form gadget.

After logging in, a member can view and update their profile, subject to any restrictions you have set in Wild Apricot.

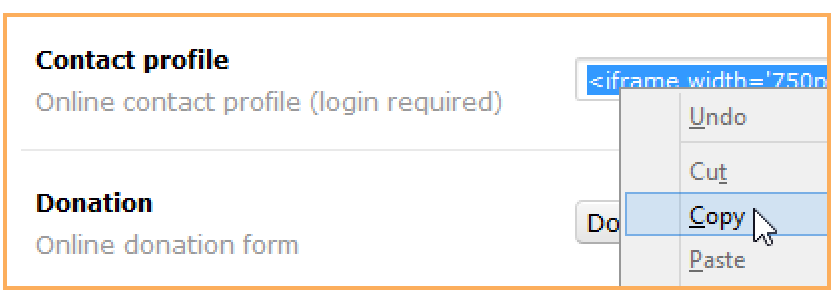


To embed a widget into another website, you copy the embed code then paste it into the other site's HTML code.

Getting the widget code

To obtain the code you need to embed a Wild Apricot member profile on another website, follow these steps:

1. Click the **Settings** menu.
2. Within the **Widgets** section, click **Widgets code**.
3. Right click over the code that appears beside **Contact profile** and copy the code to the clipboard.



You can now paste the copied embed code into the HTML code for the page on your other website.

Changing colors and fonts

To customize your embedded Wild Apricot widget so that it appears like a seamless part of your other website, you modify the appearance of the corresponding gadget in your Wild Apricot site. You can control the appearance of the widget by choosing a website theme, customizing the colors and styles, and for more advanced fine-tuning, using CSS customization.

From the Colors and Styles screen...

To change...	modify...	under...
Headings on member profile screens	Form >> Caption	**General formatting** for most themes

Any changes you make will apply to your Wild Apricot site pages as well as your embedded Wild Apricot widgets.

Widget limitations

- Widget code copied before June 27, 2013 requires visitors to your non-Wild Apricot site to have third-party cookies enabled in their browser. Widget code copied after that date will not work if third-party cookies are disabled for all sites.
- You cannot embed a widget on a page within the same Wild Apricot site.
- You cannot embed multiple Wild Apricot widgets on the same page.
- Clicking the **Forgot Password** link will take users to your Wild Apricot site.
- Links in forum subscription emails will take users to your Wild Apricot site.
- Social login buttons will not appear on the **Authorization required** system page when someone clicks the **Login** button from a widg et.
- Widgets are designed for use on other websites and can’t be used on your Wild Apricot website. Use gadgets instead.

On this page:

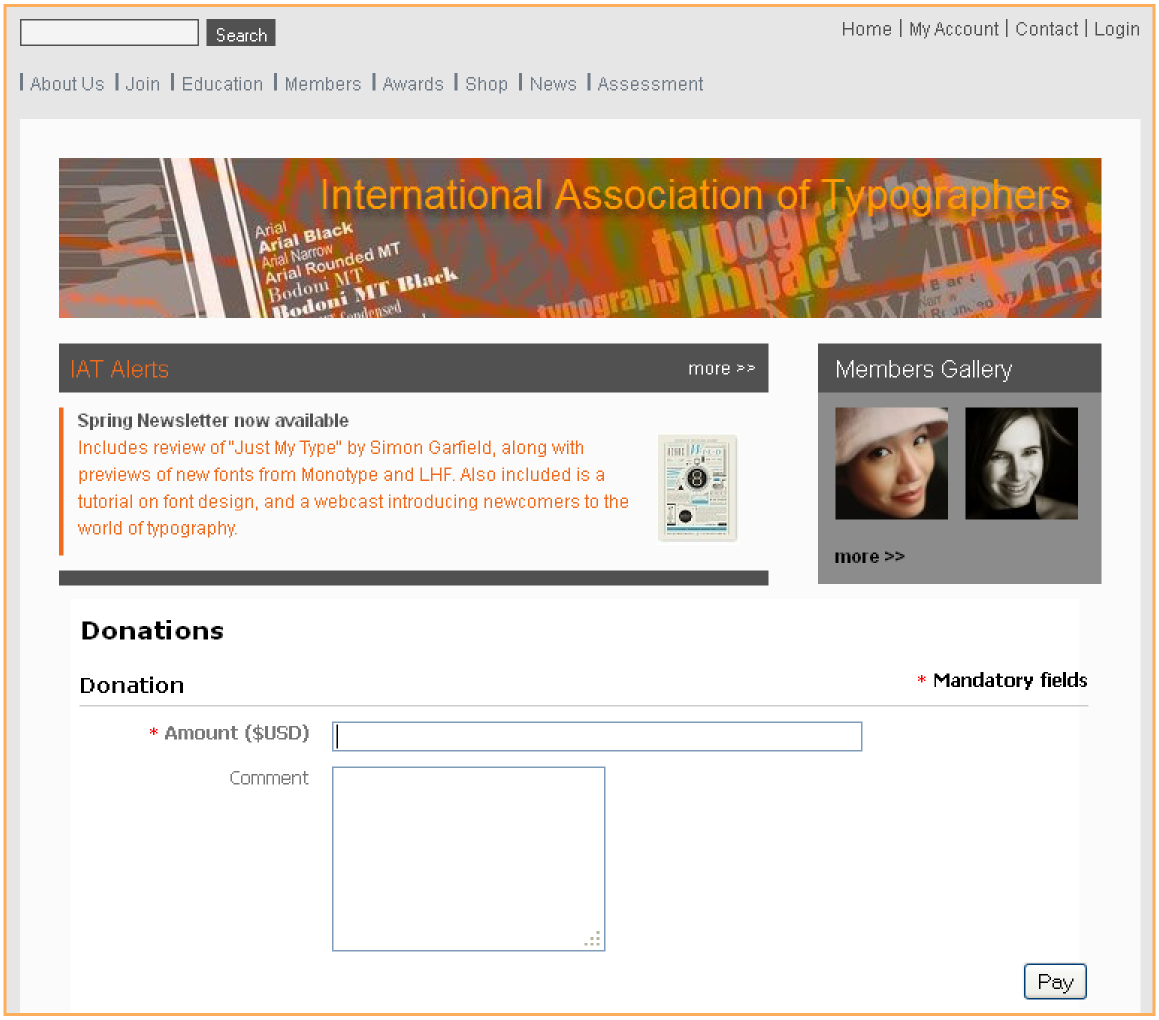
See also:

- Adding Wild Apricot functionality to other websites
- Changing the widget width
- Profile updates for members and contacts

Donation widget

Adding a donation form to another website

A widget – aka plugin – is a chunk of Wild Apricot functionality that you can embed – or integrate – into another website. Using a widget, you can embed a Wild Apricot donation form on another website.

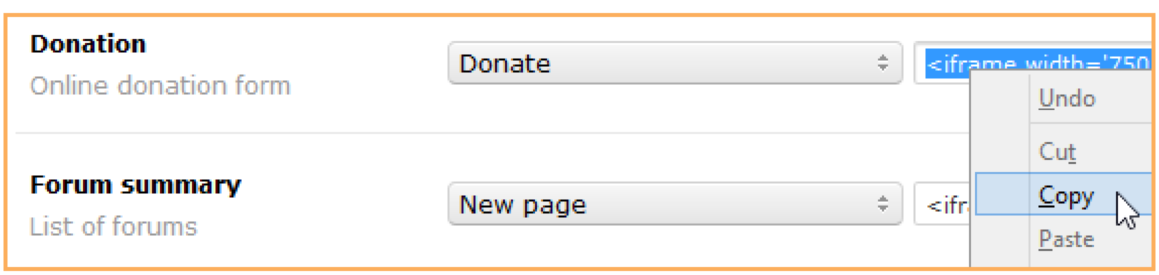


To embed a widget into another website, you copy the embed code then paste it into the other site's HTML code.

Getting the widget code

To obtain the code you need to embed a Wild Apricot donation form on another website, follow these steps:

1. Click the **Settings** menu.
2. Within the **Widgets** section, click **Widgets code**.
3. If you added more than one donation form gadget to your Wild Apricot site, click the selection button beside **Donation** and select the donation form gadget you want to embed.
4. Right click over the code that appears beside the selection button and copy the code to the clipboard.



You can now paste the copied embed code into the HTML code for the page on your other website.

Changing colors and fonts

To customize your embedded Wild Apricot widget so that it appears like a seamless part of your other website, you modify the appearance of the corresponding gadget in your Wild Apricot site. You can control the appearance of the widget by choosing a website theme, customizing the colors and styles, and for more advanced fine-tuning, using CSS customization.

For donation widgets, you can modify the following elements from the Colors and styles screen:

To change...	modify...	under...
"Donations"	Text/Normal H3 Form instructions	General formatting or Typography General formatting > Form (*Bookshelf, Building Blocks, Clean Lines, Dark Impact, Fiesta, Firma, Homestead, Showcase, Skyline, Terra, Tinted Tiles, Whiteboard, White Space only*)
"Mandatory fields"	Text/Normal Form instructions	General formatting or Typography General formatting > Form (*Bookshelf, Building Blocks, Clean Lines, Dark Impact, Fiesta, Firma, Homestead, Showcase, Skyline, Terra, Tinted Tiles, Whiteboard, White Space only*)
Labels	Text/Normal Labels	General formatting or Typography General formatting > Form
Options	Text/Normal Option title	General formatting or Typography General formatting > Form
Pay, Cancel buttons	Normal/Hover	Functional buttons (*Clean Lines, Dark Impact, Fiesta, White Space themes*)

Any changes you make will also be applied to donation gadgets on your Wild Apricot site pages.

Widget limitations

- Widget code copied before June 27, 2013 requires visitors to your non-Wild Apricot site to have third-party cookies enabled in their browser. Widget code copied after that date will not work if third-party cookies are disabled for all sites.
- You cannot embed a widget on a page within the same Wild Apricot site.
- You cannot embed multiple Wild Apricot widgets on the same page.
- Clicking the **Forgot Password** link will take users to your Wild Apricot site.
- Links in forum subscription emails will take users to your Wild Apricot site.
- Social login buttons will not appear on the **Authorization required** system page when someone clicks the **Login** button from a widget.
- Widgets are designed for use on other websites and can't be used on your Wild Apricot website. Use gadgets instead.

On this page:

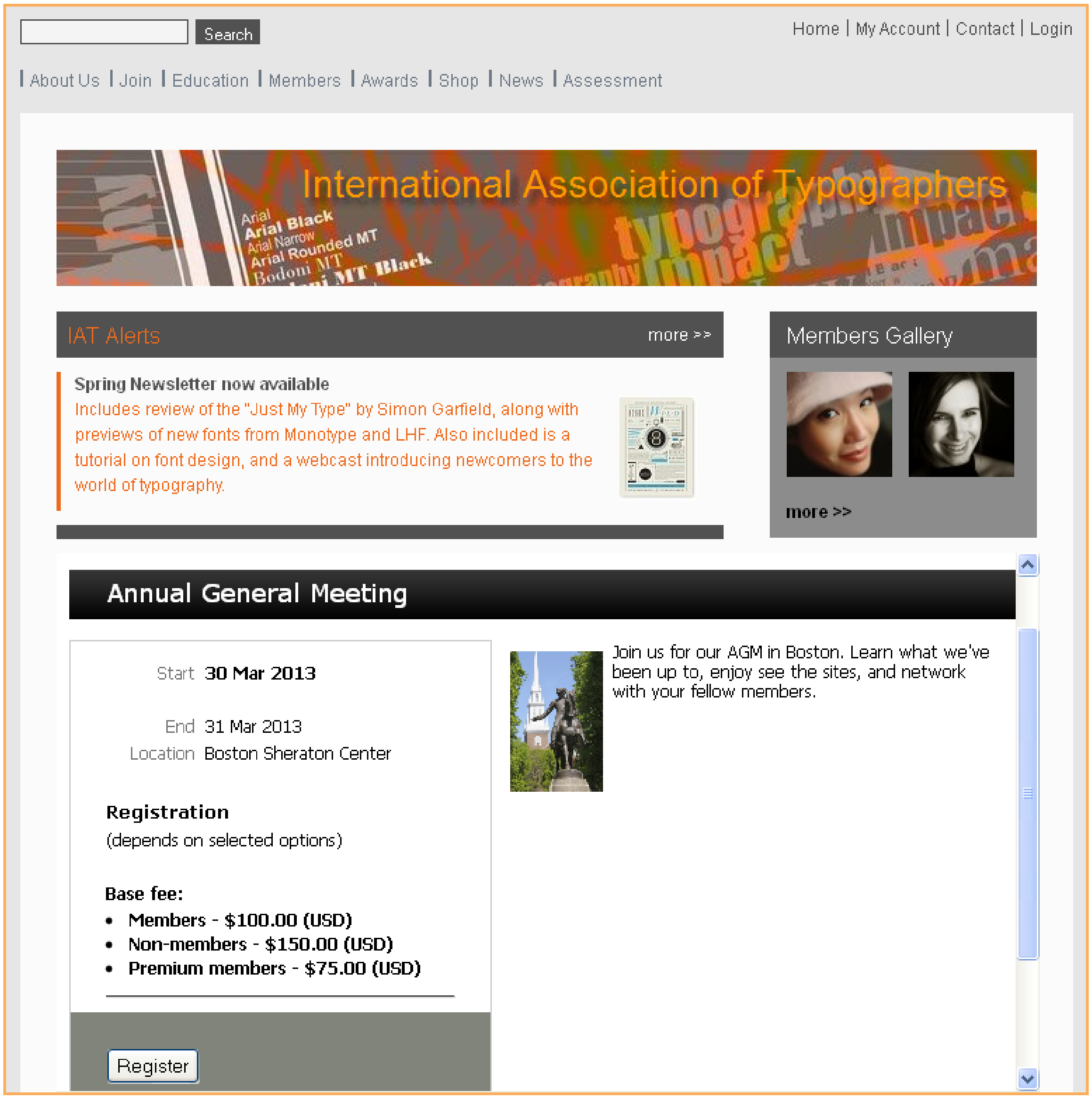
See also:

- Adding Wild Apricot functionality to other websites
- Changing the widget width
- Donation forms

Event details widget

Adding event details to another website

A widget – aka plugin – is a chunk of Wild Apricot functionality that you can embed – or integrate – into another website. Using a widget, you can embed the details for an event from your Wild Apricot database on another website. Visitors can register for the event and pay the registration fee online.



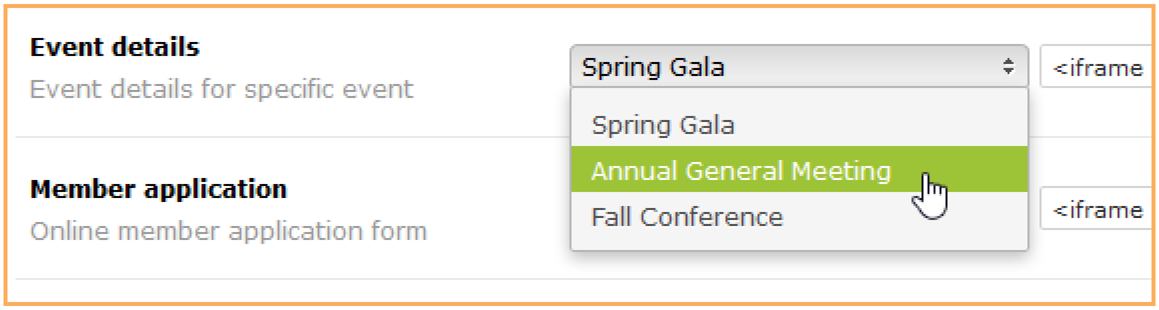
The event must take place in the future, and its access must be set to public.

To embed a widget into another website, you copy the embed code then paste it into the other site's HTML code.

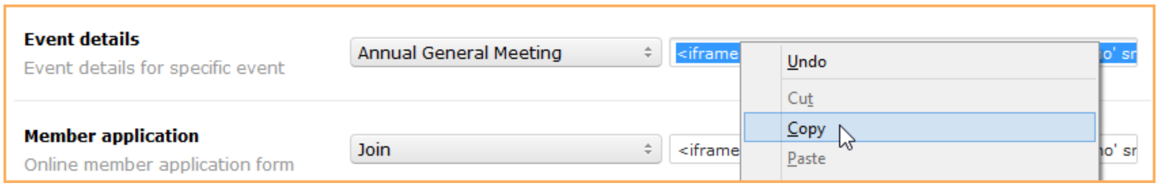
Getting the widget code

To obtain the code you need to embed the details for a specific Wild Apricot event on another website, follow these steps:

1. Click the **Settings** menu.
2. Within the **Widgets** section, click **Widgets code**.
3. Click the selection button beside **Event details** and select the event you want to embed.



4. Right click over the code that appears beside the selection button and copy the code to the clipboard.



You can now paste the copied embed code into the HTML code for the page on your other website.

Changing colors and fonts

To customize your embedded Wild Apricot widget so that it appears like a seamless part of your other website, you modify the appearance of the corresponding gadget in your Wild Apricot site. You can control the appearance of the widget by choosing a website theme, customizing the colors and styles, and for more advanced fine-tuning, using CSS customization.

From the Colors and Styles screen...

To change...	modify...	under...
Event name	H1	General formatting or Typography
"Back", "Add to my calendar", "Already registered" links	Text Link	General formatting or Typography
Date and location	Text Info box	General formatting or Typography General formatting (*for Blueprint, Fiesta, Treehouse, Simple, Business Casual, and Granite themes*)
Registration heading	Text H4 Info box	General formatting or Typography General formatting (*for Blueprint, Fiesta, Treehouse, Simple, Business Casual, and Granite themes)*
Event details	Text	General formatting or Typography
Background color of event detail area	Colored box >> Info box	General formatting (*for Aurora, Glass, Keynote, Memo, Nature, and Notebook themes*)
Background color of event registration form	Form >> Background color	General formatting (*for Aurora, Glass, Keynote, Memo, Nature, and Notebook themes*)

Any changes you make will apply to your Wild Apricot site pages as well as your embedded Wild Apricot widgets.

Widget limitations

- Widget code copied before June 27, 2013 requires visitors to your non-Wild Apricot site to have third-party cookies enabled in their browser. Widget code copied after that date will not work if third-party cookies are disabled for all sites.

- You cannot embed a widget on a page within the same Wild Apricot site.
- You cannot embed multiple Wild Apricot widgets on the same page.
- Clicking the **Forgot Password** link will take users to your Wild Apricot site.
- Links in forum subscription emails will take users to your Wild Apricot site.
- Social login buttons will not appear on the **Authorization required** system page when someone clicks the **Login** button from a widget.
- Widgets are designed for use on other websites and can't be used on your Wild Apricot website. Use gadgets instead.

On this page:

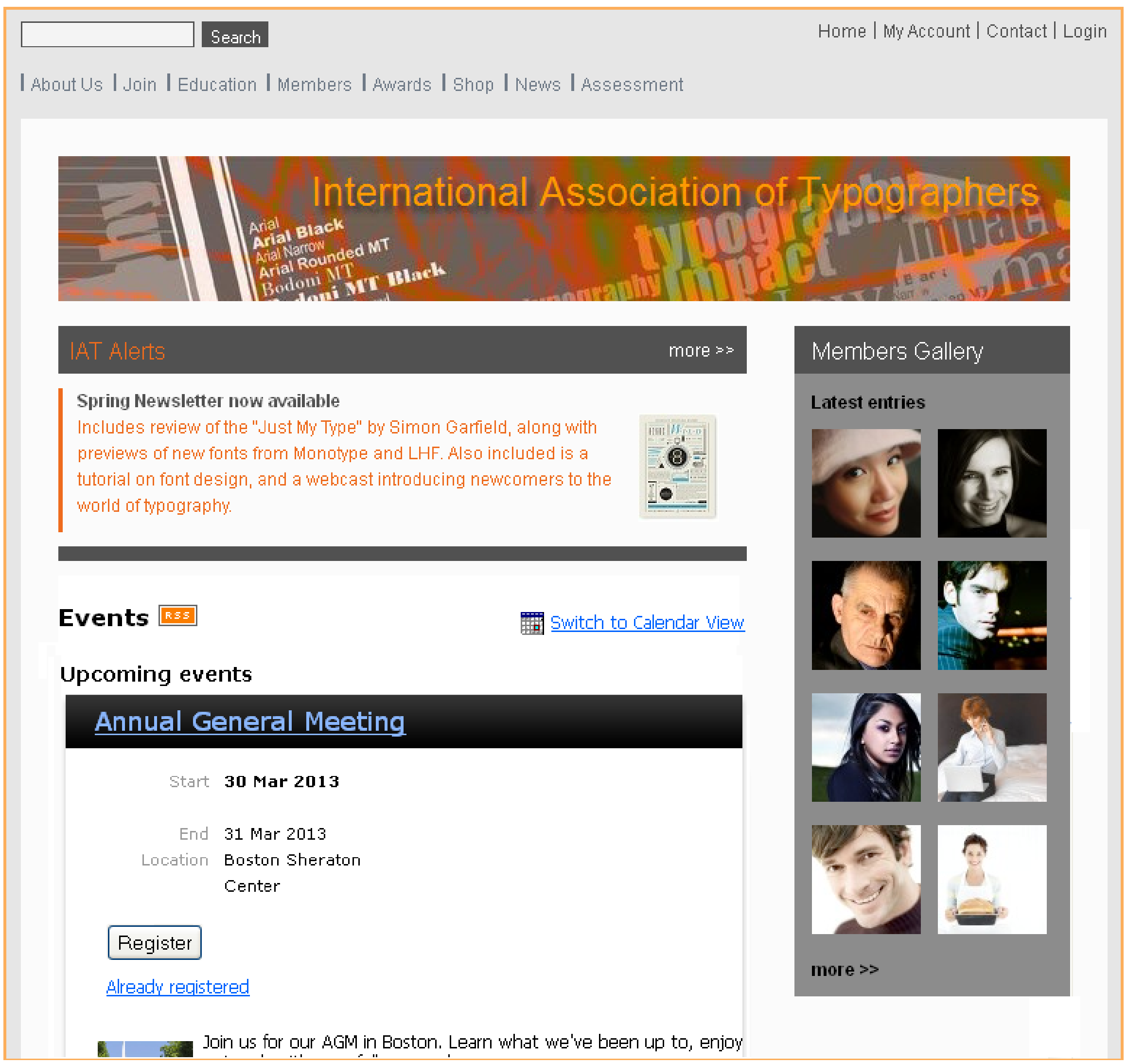
See also:

- Adding Wild Apricot functionality to other websites
- Changing the widget width
- Setting up events

Event list widget

Adding an event calendar to another website

A widget – aka plugin – is a chunk of Wild Apricot functionality that you can embed – or integrate – into another website. Using a widget, you can embed a Wild Apricot event calendar – a list of current and past events from your Wild Apricot events database – on another website.

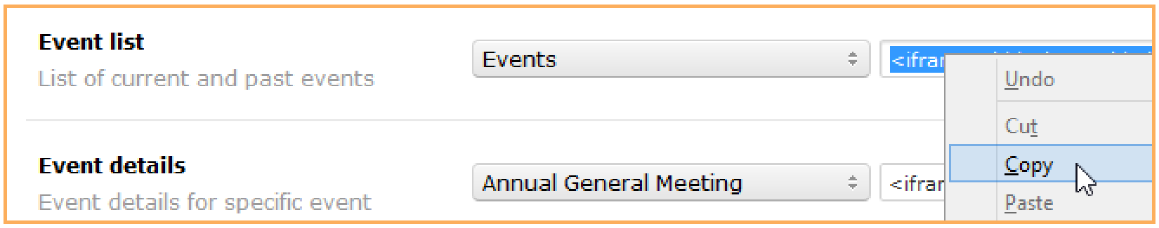


To embed a widget into another website, you copy the embed code then paste it into the other site's HTML code.

Getting the widget code

To obtain the code you need to embed a Wild Apricot event calendar on another website, follow these steps:

1. Click the **Settings** menu.
2. Within the **Widgets** section, click **Widgets code**.
3. If you added more than one event calendar gadget to your Wild Apricot site, click the selection button beside **Event list** and select the event calendar gadget you want to embed.
4. Right click over the code that appears beside the selection button and copy the code to the clipboard.



You can now paste the copied embed code into the HTML code for the page on your other website.

Changing colors and fonts

To customize your embedded Wild Apricot widget so that it appears like a seamless part of your other website, you modify the appearance of the corresponding gadget in your Wild Apricot site. You can control the appearance of the widget by choosing a website theme, customizing the colors and styles, and for more advanced fine-tuning, using CSS customization.

For event list widgets, you can modify the following elements from the Colors and styles screen:

To change...	modify...	under...
Section headings	H3 Event calendar title Title	General formatting or Typography Typography (*Bookshelf, Clean Lines, Dark Impact, Fiesta, Firma, Homestead, Showcase, Skyline, Terra, Treehouse, Whiteboard, and White Space themes*) Event calendar (*Building Blocks, Tinted Tiles themes)*
"Registration" on event details page	H4	General formatting or Typography
"Switch to Calendar/List View"	Text/Normal Link	General formatting or Typography
Event name	H4 Link	General formatting or Typography
Event details	Text/Normal	General formatting or Typography
Event description	Text/Normal Info box	General formatting or Typography General formatting (*for Blueprint, Business Casual, and Granite themes*)
"Already registered", "Show details"	Text/Normal Link Info box	General formatting or Typography General formatting or Typography General formatting (*for Blueprint, Business Casual, and Granite themes*)
Background color of event detail area	Colored box >> Info box	General formatting (*for Aurora, Glass, Keynote, Memo, Nature, and Notebook themes*)

Background color of event registration form	Form >> Background color	General formatting (*for Aurora, Glass, Keynote, Memo, Nature, and Notebook themes*)
Register button	Normal/Hover	Functional buttons (*Clean Lines, Dark Impact, Fiesta, White Space themes*)

Any changes you make will also be applied to event calendar gadgets on your Wild Apricot site pages.

Widget limitations

- Widget code copied before June 27, 2013 requires visitors to your non-Wild Apricot site to have third-party cookies enabled in their browser. Widget code copied after that date will not work if third-party cookies are disabled for all sites.
- You cannot embed a widget on a page within the same Wild Apricot site.
- You cannot embed multiple Wild Apricot widgets on the same page.
- Clicking the **Forgot Password** link will take users to your Wild Apricot site.
- Links in forum subscription emails will take users to your Wild Apricot site.
- Social login buttons will not appear on the **Authorization required** system page when someone clicks the **Login** button from a widg et.
- Widgets are designed for use on other websites and can't be used on your Wild Apricot website. Use gadgets instead.

On this page:

- Getting the widget code
- Changing colors and fonts
- Widget limitations

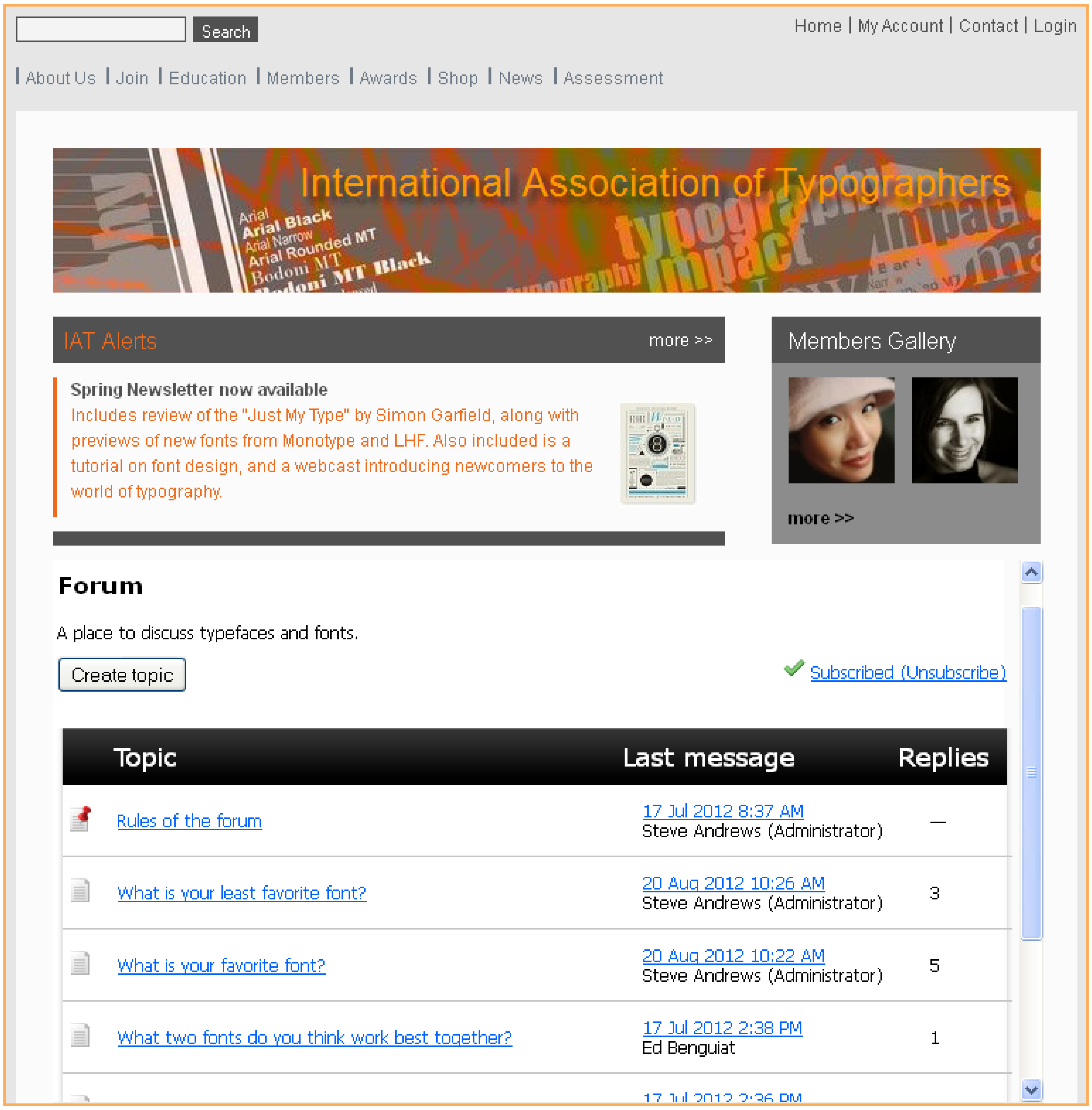
See also:

- Adding Wild Apricot functionality to other websites
- Changing the widget width
- Publishing your event calendar

Forum widget

Adding a forum to another website

A widget – aka plugin – is a chunk of Wild Apricot functionality that you can embed – or integrate – into another website. Using a widget, you can embed a Wild Apricot forum on another website.



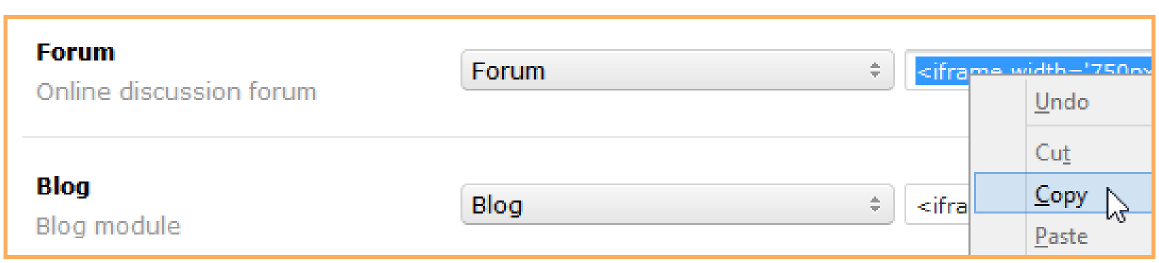
If you have multiple forums on your site, the forum widget will display the first forum you created on your Wild Apricot site.

To embed a widget into another website, you copy the embed code then paste it into the other site's HTML code.

Getting the widget code

To obtain the code you need to embed a Wild Apricot forum on another website, follow these steps:

1. Click the **Settings** menu.
2. Within the **Widgets** section, click **Widgets code**.
3. If you added more than one discussion forum gadget to your Wild Apricot site, click the selection button beside **Forum** and select the discussion forum gadget you want to embed.
4. Right click over the code that appears beside the selection button and copy the code to the clipboard.



You can now paste the copied embed code into the HTML code for the page on your other website.

Changing colors and fonts

To customize your embedded Wild Apricot widget so that it appears like a seamless part of your other website, you modify the appearance of the corresponding gadget in your Wild Apricot site. You can control the appearance of the widget by choosing a website theme, customizing the colors and styles, and for more advanced fine-tuning, using CSS customization.

For forum widgets, you can modify the following elements from the Colors and styles screen:

To change...	modify...	under...
"Subscribe/Unsubscribe"	Text/Normal Link	General formatting or Typography
Forum headings	Text/Normal H4 Column/Forum headings	General formatting or Typography Forum (*Bookshelf, Building Blocks, Clean Lines, Dark Impact, Fiesta, Firma, Homestead, Showcase, Skyline, Terra, Tinted Tiles, Treehouse, Whiteboard and White Space themes*)
Forum entries	Text/Normal Link Text	General formatting or Typography List (*Blueprint themes*)
Table rows	Table row Row	Forum (*Bookshelf, Building Blocks, Clean Lines, Dark Impact, Fiesta, Firma, Homestead, Showcase, Skyline, Terra, Tinted Tiles, Treehouse, Whiteboard and White Space themes*) List (*Blueprint themes*)
Links within table	Table links Link	Forum (*Bookshelf, Building Blocks, Clean Lines, Dark Impact, Fiesta, Firma, Homestead, Showcase, Skyline, Terra, Tinted Tiles, Treehouse, Whiteboard and White Space themes*) List (*Blueprint themes*)
Topic author	Author	Forum (*Bookshelf, Building Blocks, Clean Lines, Dark Impact, Fiesta, Firma, Homestead, Showcase, Skyline, Terra, Tinted Tiles, Treehouse, Whiteboard and White Space themes*)
Topic date and time	Date and time	Forum (*Bookshelf, Building Blocks, Clean Lines, Dark Impact, Fiesta, Firma, Homestead, Showcase, Skyline, Terra, Tinted Tiles, Treehouse, Whiteboard and White Space themes*)
Create topic button	Normal/Hover	Functional buttons (C*lean Lines, Dark Impact, Fiesta, White Space themes*)
Icons used on mobile version	Icons	Forum (*Bookshelf, Building Blocks, Clean Lines, Dark Impact, Fiesta, Firma, Homestead, Showcase, Skyline, Terra, Tinted Tiles, Whiteboard and White Space themes*)

Any changes you make will also be applied to discussion forum gadgets on your Wild Apricot site pages.

Using CSS, you can:

- Remove the last update author's name
- Remove the author and the date

Any changes you make will apply to your Wild Apricot site pages as well as your embedded Wild Apricot widgets.

Widget limitations

- Widget code copied before June 27, 2013 requires visitors to your non-Wild Apricot site to have third-party cookies enabled in their browser. Widget code copied after that date will not work if third-party cookies are disabled for all sites.
- You cannot embed a widget on a page within the same Wild Apricot site.
- You cannot embed multiple Wild Apricot widgets on the same page.
- Clicking the **Forgot Password** link will take users to your Wild Apricot site.
- Links in forum subscription emails will take users to your Wild Apricot site.
- Social login buttons will not appear on the **Authorization required** system page when someone clicks the **Login** button from a widg et.
- Widgets are designed for use on other websites and can't be used on your Wild Apricot website. Use gadgets instead.

On this page:

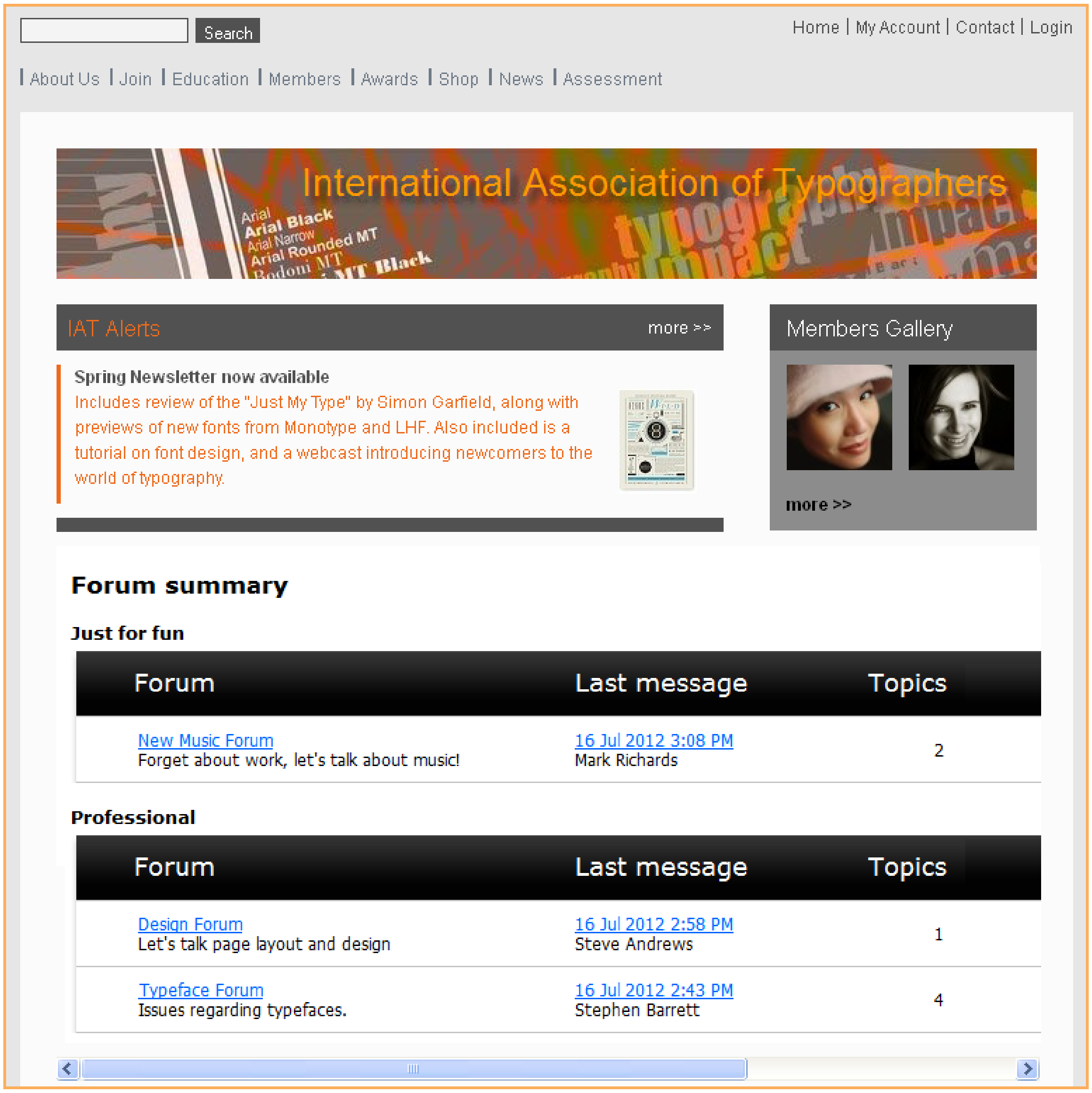
See also:

- Adding Wild Apricot functionality to other websites
- Changing the widget width
- Setting up and using discussion forums

Forum summary widget

Adding a forum summary to another website

A widget – aka plugin – is a chunk of Wild Apricot functionality that you can embed – or integrate – into another website. Using a widget, you can embed a Wild Apricot forum summary on another website. The forum summary displays a summary of activity in your Wild Apricot forums .

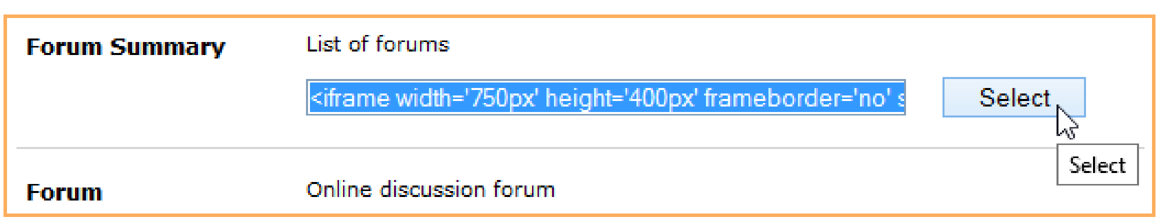


To embed a widget into another website, you copy the embed code then paste it into the other site's HTML code.

Getting the widget code

To obtain the code you need to embed a Wild Apricot forum summary on another website, follow these steps:

1. Click the **Settings** menu.
2. Within the **Widgets** section, click **Widgets code**.
3. If you added more than one forum summary gadget to your Wild Apricot site, click the selection button beside **Forum summary** and select the forum summary gadget you want to embed.
4. Right click over the code that appears beside the selection button and copy the code to the clipboard.



You can now paste the copied embed code into the HTML code for the page on your other website.

Changing colors and fonts

To customize your embedded Wild Apricot widget so that it appears like a seamless part of your other website, you modify the appearance of the corresponding gadget in your Wild Apricot site. You can control the appearance of the widget by choosing a website theme, customizing the colors and styles, and for more advanced fine-tuning, using CSS customization.

For forum summary widgets, you can modify the following elements from the Colors and styles screen:

To change...	modify...	under...
Forum category	Forum category	Forum (*Bookshelf, Building Blocks, Clean Lines, Dark Impact, Fiesta, Firma, Homestead, Showcase, Skyline, Terra, Tinted Tiles, Treehouse, Whiteboard, and White Space themes only*)
Forum name	H5	General formatting or Typography
Column headings	Column headings H4	Forum (*Bookshelf, Building Blocks, Clean Lines, Dark Impact, Fiesta, Firma, Homestead, Showcase, Skyline, Terra, Tinted Tiles, Treehouse, Whiteboard, and White Space themes only*) General formatting or Typography
Summary text	Text	General formatting or Typography
Summary links	Links	General formatting or Typography
Table listing forum topics	Info box	General formatting (*for Blueprint, Business Casual, and Granite themes*)
Table rows	Table row	Forum (*Bookshelf, Building Blocks, Clean Lines, Dark Impact, Fiesta, Firma, Homestead, Showcase, Skyline, Terra, Tinted Tiles, Treehouse, Whiteboard, and White Space themes only*)
Links within table	Table links	Forum (*Bookshelf, Building Blocks, Clean Lines, Dark Impact, Fiesta, Firma, Homestead, Showcase, Skyline, Terra, Tinted Tiles, Treehouse, Whiteboard, and White Space themes only*)
Topic author	Author	Forum (*Bookshelf, Building Blocks, Clean Lines, Dark Impact, Fiesta, Firma, Homestead, Showcase, Skyline, Terra, Tinted Tiles, Treehouse, Whiteboard, and White Space themes only*)
Topic date and time	Date and time	Forum (*Bookshelf, Building Blocks, Clean Lines, Dark Impact, Fiesta, Firma, Homestead, Showcase, Skyline, Terra, Tinted Tiles, Treehouse, Whiteboard, and White Space themes only*)
Icons used on mobile version	icons	Forum (*Building Blocks, Clean Lines, Dark Impact, Fiesta, Firma, Homestead, Showcase, Skyline, Terra, Tinted Tiles, and White Space themes*)

Any changes you make will also be applied to forum summary gadgets on your Wild Apricot site pages.

Using CSS , you can:

- Remove the last update author's name

- Remove the author and the date

Any changes you make will apply to your Wild Apricot site pages as well as your embedded Wild Apricot widgets.

Widget limitations

- Widget code copied before June 27, 2013 requires visitors to your non-Wild Apricot site to have third-party cookies enabled in their browser. Widget code copied after that date will not work if third-party cookies are disabled for all sites.
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- You cannot embed multiple Wild Apricot widgets on the same page.
- Clicking the **Forgot Password** link will take users to your Wild Apricot site.
- Links in forum subscription emails will take users to your Wild Apricot site.
- Social login buttons will not appear on the **Authorization required** system page when someone clicks the **Login** button from a widg et.
- Widgets are designed for use on other websites and can’t be used on your Wild Apricot website. Use gadgets instead.

On this page:

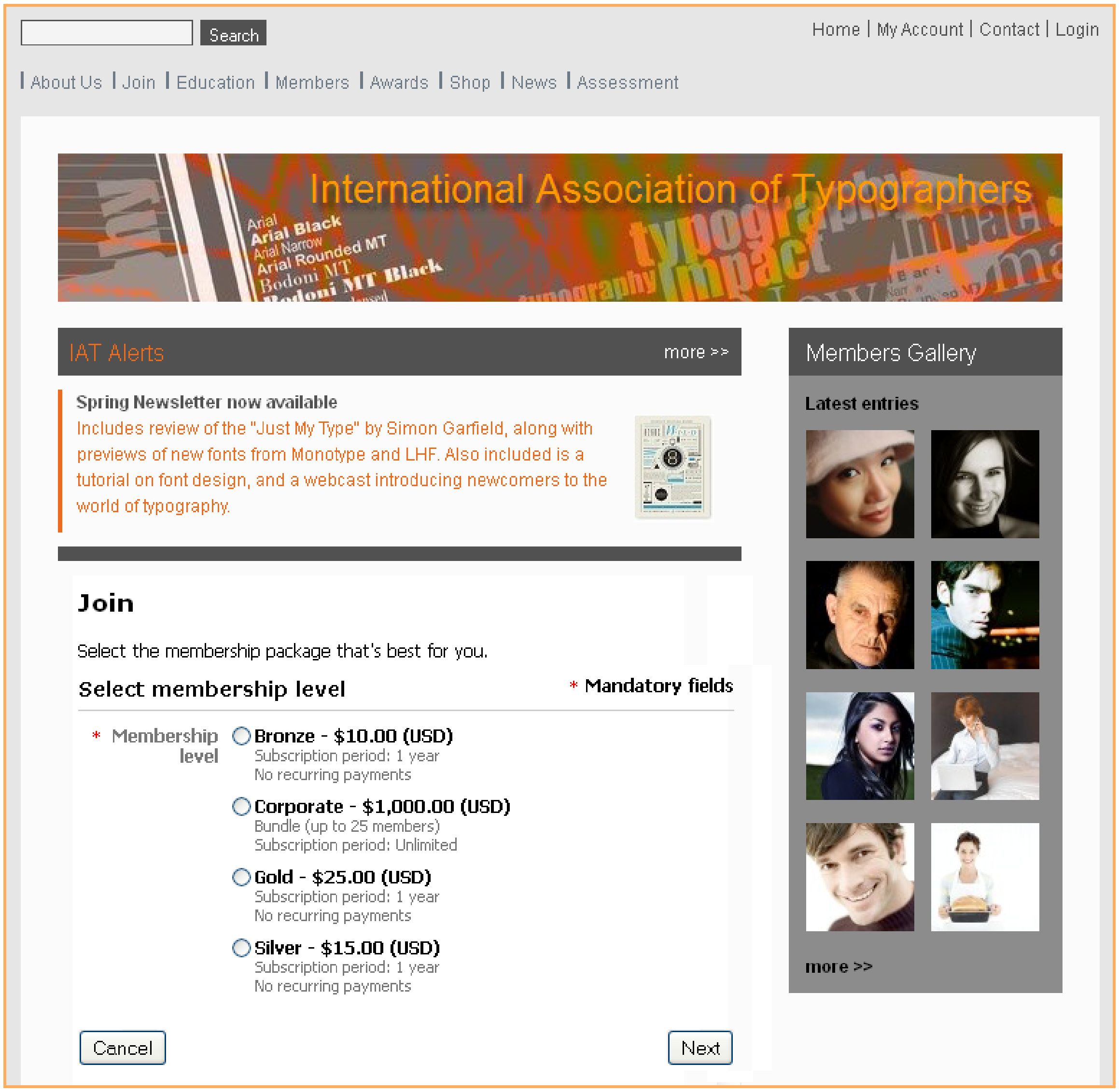
See also:

- Adding Wild Apricot functionality to other websites
- Changing the widget width
- Setting up and using discussion forums

Membership application widget

Adding a membership application form to another website

A widget – aka plugin – is a chunk of Wild Apricot functionality that you can embed – or integrate – into another website. Using a widget, you can embed a Wild Apricot membership application form on another website. Using the form, visitors can apply for membership to your Wild Apricot site and pay the membership fee online.

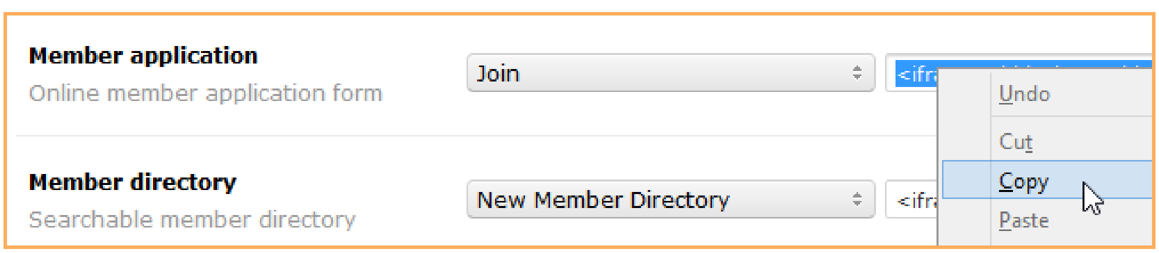


To embed a widget into another website, you copy the embed code then paste it into the other site's HTML code.

Getting the widget code

To obtain the code you need to embed a Wild Apricot membership application form on another website, follow these steps:

1. Click the **Settings** menu.
2. Within the **Widgets** section, click **Widgets code**.
3. If you added more than one membership application gadget to your Wild Apricot site, click the selection button beside **Membership application** and select the membership application gadget you want to embed.
4. Right click over the code that appears beside the selection button and copy the code to the clipboard.



You can now paste the copied embed code into the HTML code for the page on your other website.

Changing colors and fonts

To customize your embedded Wild Apricot widget so that it appears like a seamless part of your other website, you modify the appearance of the corresponding gadget in your Wild Apricot site. You can control the appearance of the widget by choosing a website theme, customizing the colors and styles, and for more advanced fine-tuning, using CSS customization.

For membership application widgets, you can modify the following elements from the Colors and styles screen:

To change...	modify...	under...
"Select membership level"	Text/Normal H3 Form instructions	General formatting or General formatting > Typography General formatting > Form (*Bookshelf, Building Blocks, Clean Lines, Dark Impact, Fiesta, Firma, Homestead, Showcase, Skyline, Terra, Tinted Tiles, Treehouse, Whiteboard, and White Space only*)
"Mandatory fields"	Text/Normal Form instructions	General formatting or General formatting > Typography General formatting > Form (*Bookshelf, Building Blocks, Clean Lines, Dark Impact, Fiesta, Firma, Homestead, Showcase, Skyline, Terra, Tinted Tiles, Treehouse, Whiteboard, and White Space only*)
"Membership level"	Text/Normal Labels	General formatting or General formatting > Typography General formatting > Form
Level name	Text/Normal Option title	General formatting or General formatting > Typography General formatting > Form
Level description	Text/Normal Field explanation Option title	General formatting or General formatting > Typography General formatting > Form
Next, Cancel buttons	Normal/Hover	Functional buttons (*Clean Lines, Dark Impact, Fiesta, White Space themes*)
Background color of form	Form >> Background color	General formatting (*for Aurora, Glass, Keynote, Memo, Nature, and Notebook themes*)

Any changes you make will also be applied to membership application gadgets on your Wild Apricot site pages.

Widget limitations

- Widget code copied before June 27, 2013 requires visitors to your non-Wild Apricot site to have third-party cookies enabled in their browser. Widget code copied after that date will not work if third-party cookies are disabled for all sites.
- You cannot embed a widget on a page within the same Wild Apricot site.
- You cannot embed multiple Wild Apricot widgets on the same page.
- Clicking the **Forgot Password** link will take users to your Wild Apricot site.
- Links in forum subscription emails will take users to your Wild Apricot site.
- Social login buttons will not appear on the **Authorization required** system page when someone clicks the **Login** button from a widget.
- Widgets are designed for use on other websites and can't be used on your Wild Apricot website. Use gadgets instead.

On this page:

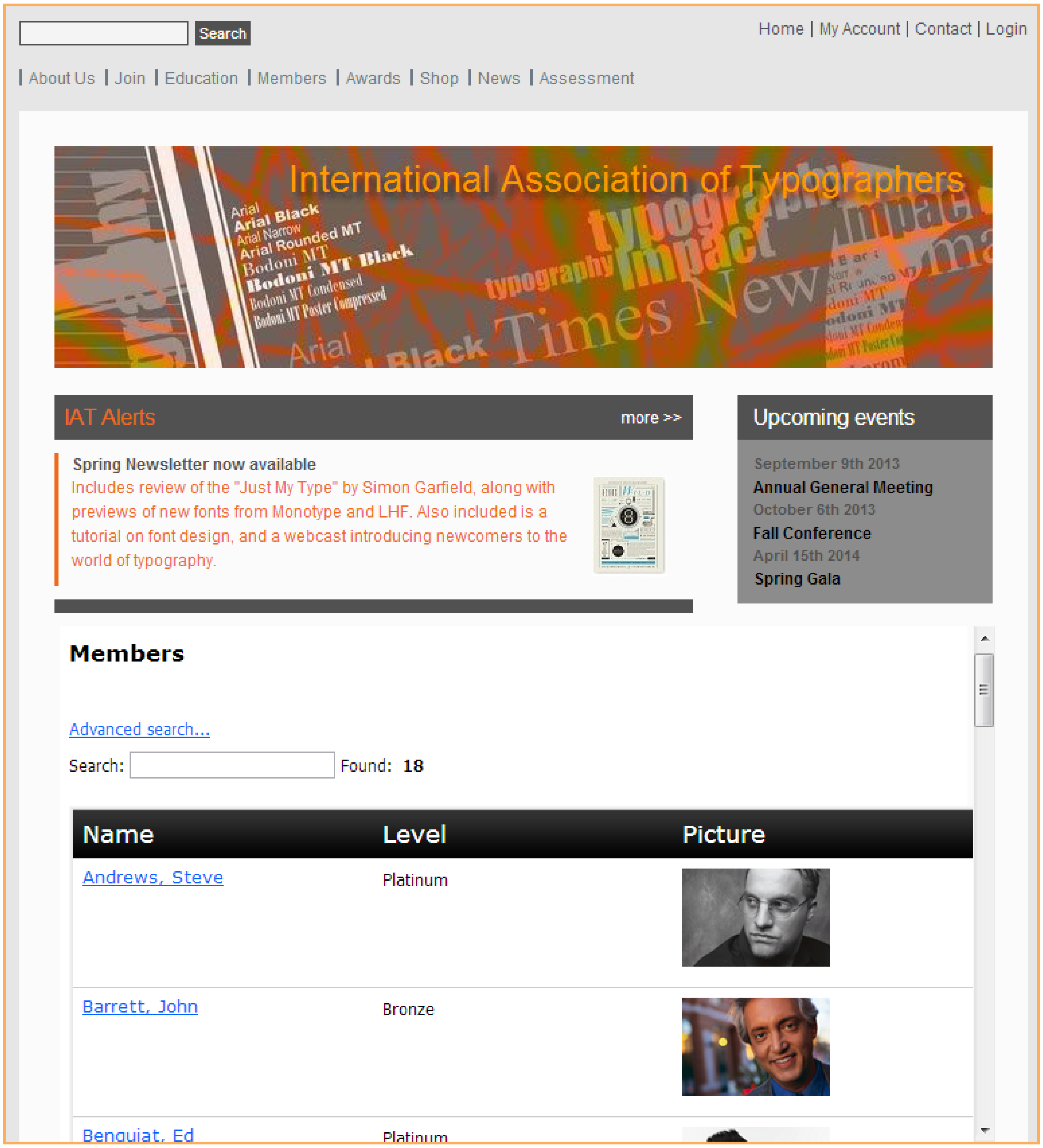
See also:

- Adding Wild Apricot functionality to other websites
- Changing the widget width
- Membership application form

Member directory widget

Adding a member directory to another website

A widget – aka plugin – is a chunk of Wild Apricot functionality that you can embed – or integrate – into another website. Using a widget, you can embed a Wild Apricot member directory on another website. Using the directory, visitors can view a list of your members, subject to any restrictions you have set in Wild Apricot.



To embed a widget into another website, you copy the embed code then paste it into the other site's HTML code.

Getting the widget code

To obtain the code you need to embed a Wild Apricot member directory on another website, follow these steps:

1. Click the **Settings** menu.
2. Within the **Widgets** section, click **Widgets code**.
3. If you added more than one member directory gadget to your Wild Apricot site, click the selection button beside **Member directory** a nd select the member directory gadget you want to embed.
4. Right click over the code that appears beside the selection button and copy the code to the clipboard.

You can now paste the copied embed code into the HTML code for the page on your other website.

Changing colors and fonts

To customize your embedded Wild Apricot widget so that it appears like a seamless part of your other website, you modify the appearance of the corresponding gadget in your Wild Apricot site. You can control the appearance of the widget by choosing a website theme, customizing the colors and styles, and for more advanced fine-tuning, using CSS customization.

For member directory widgets, you can modify the following elements from the Colors and styles screen:

To change...	modify...	under...
Filter field name	Text/Normal	General formatting or Typography
Filter field values	Text/Normal Link	General formatting or Typography
"Advanced search/Simple search"	Text/Normal Link	General formatting or Typography
Search box	Text/Normal	General formatting or Typography
Directory headings	Text/Normal (*Blueprint, Nature, Memo, Glass, Keynote, Notebook, Aurora themes*) Header (*Business Casual, Fiesta, and Granite themes*) Column headings (*Bookshelf, Building Blocks, Clean Lines, Dark Impact, Firma, Homestead, Showcase, Skyline, Terra, Tint ed Tiles, Treehouse, Whiteboard, White Space themes*)	General formatting or Typography Table
Directory entries	Text/Normal Table row (*Nature, Memo, Glass, Keynote, Notebook, Aurora themes*)	General formatting or Typography Table
Public profile links	Link (General formatting or Typography) Table row, Table links (*except for Nature, Memo, Glass, Keynote, Notebook, Aurora themes*)	General formatting or Typography Table
Advanced search labels	Text (General formatting or Typography) Label(s) (*except for Nature, Memo, Glass, Keynote, Notebook, Aurora themes*) Text (*for Nature, Memo, Glass, Keynote, Notebook, Aurora themes*)	General formatting or Typography Form Form

Advanced search values	Text/Normal (General formatting or Typography) Option title (*except for Nature, Memo, Glass, Keynote, Notebook, Aurora themes*) Text (*for Nature, Memo, Glass, Keynote, Notebook, Aurora themes*)	General formatting or Typography Form Form

Any changes you make will also be applied to member directory gadgets on your Wild Apricot site pages.

Widget limitations

- Widget code copied before June 27, 2013 requires visitors to your non-Wild Apricot site to have third-party cookies enabled in their browser. Widget code copied after that date will not work if third-party cookies are disabled for all sites.
- You cannot embed a widget on a page within the same Wild Apricot site.
- You cannot embed multiple Wild Apricot widgets on the same page.
- Clicking the **Forgot Password** link will take users to your Wild Apricot site.
- Links in forum subscription emails will take users to your Wild Apricot site.
- Social login buttons will not appear on the **Authorization required** system page when someone clicks the **Login** button from a widg et.
- Widgets are designed for use on other websites and can't be used on your Wild Apricot website. Use gadgets instead.

On this page:

- Getting the widget code
- Changing colors and fonts
- Widget limitations

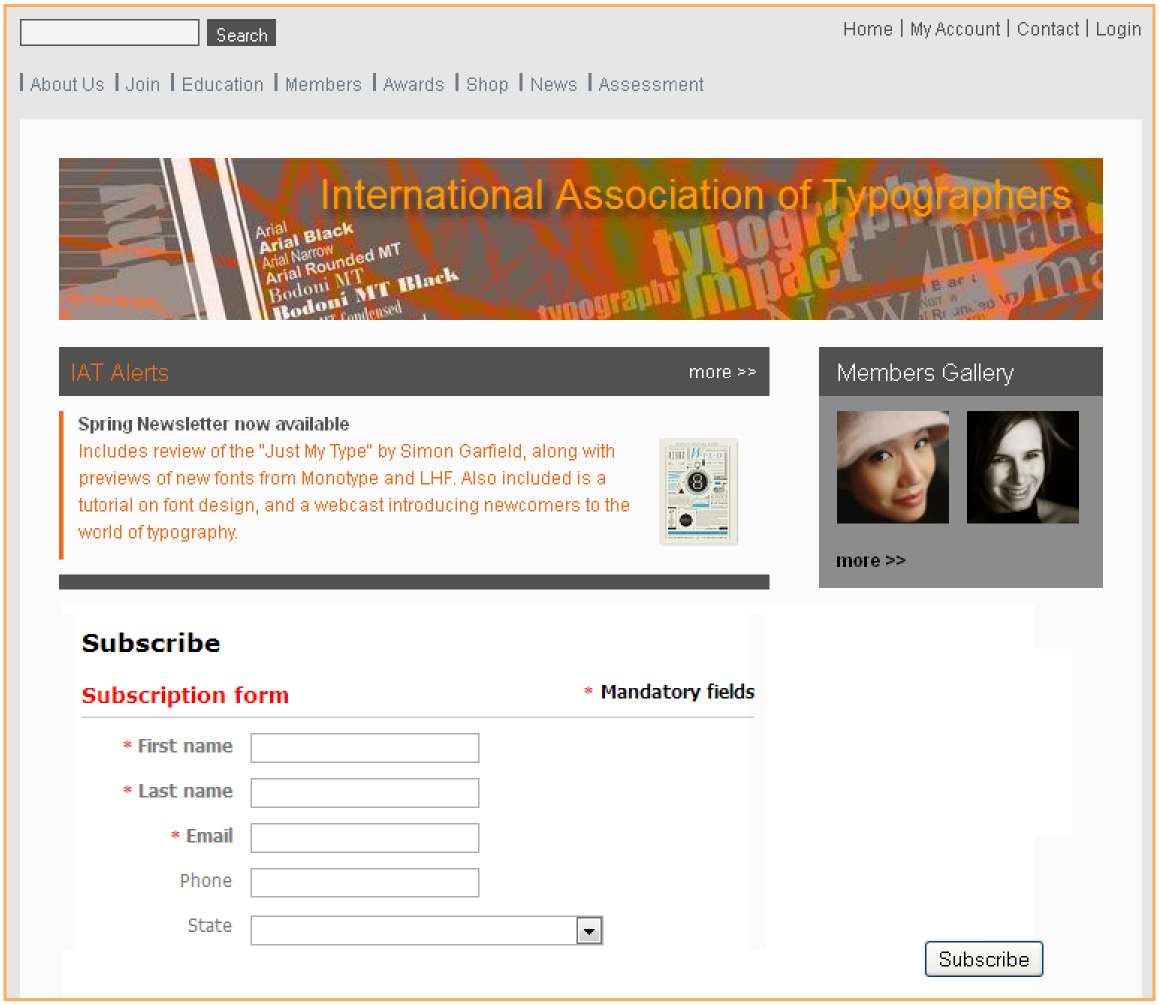
See also:

- Adding Wild Apricot functionality to other websites
- Changing the widget width
- Member directory

Subscription form widget

Adding an email subscription form to another website

A widget – aka plugin – is a chunk of Wild Apricot functionality that you can embed – or integrate – into another website. Using a widget, you can embed an email subscription form on another website. Using the form, visitors can use to sign up for emails from your Wild Apricot site.

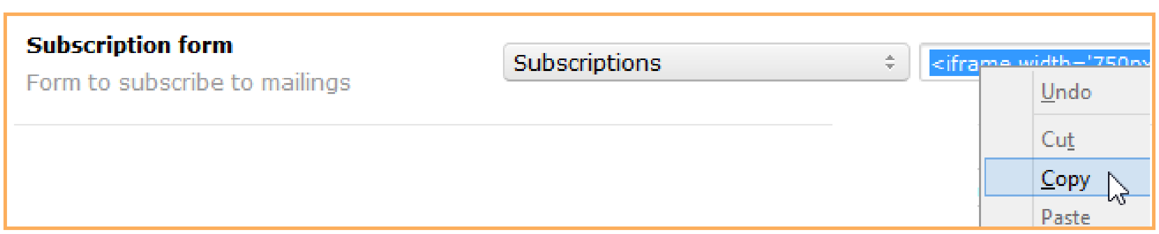


To embed a widget into another website, you copy the embed code then paste it into the other site's HTML code.

Getting the widget code

To obtain the code you need to embed a Wild Apricot email subscription form on another website, follow these steps:

1. Click the **Settings** menu.
2. Within the **Widgets** section, click **Widgets code**.
3. If you added more than one subscription form gadget to your Wild Apricot site, click the selection button beside **Subscription form** a nd select the subscription form gadget you want to embed.
4. Right click over the code that appears beside the selection button and copy the code to the clipboard.



You can now paste the copied embed code into the HTML code for the page on your other website.

Changing colors and fonts

To customize your embedded Wild Apricot widget so that it appears like a seamless part of your other website, you modify the appearance of the corresponding gadget in your Wild Apricot site. You can control the appearance of the widget by choosing a website theme, customizing the colors and styles, and for more advanced fine-tuning, using CSS customization.

For subscription form widgets, you can modify the following elements from the Colors and styles screen:

To change...	modify...	under...
"Subscription form"	Form instructions H3	General formatting > Form (*Bookshelf, Building Blocks, Clean Lines, Dark Impact, Fiesta, Firma, Homestead, Showcase, Skyline, Terra, Tinted Tiles, Treehouse, Whiteboard, and White Spaces themes*) General formatting or Typography
"Mandatory fields"	Form instructions Text/Normal	General formatting > Form (*Bookshelf, Building Blocks, Clean Lines, Dark Impact, Fiesta, Firma, Homestead, Showcase, Skyline, Terra, Tinted Tiles, Treehouse, Whiteboard, and White Spaces themes*) General formatting or Typography
Labels	Text/Normal Labels	General formatting or Typography General formatting > Form
Back button	Text/Normal Link	General formatting or Typography
Subscribe button	Normal/Hover	Functional buttons (*Clean Lines, Dark Impact, Fiesta, White Space themes*)

Any changes you make will also be applied to subscription form gadgets on your Wild Apricot site pages.

Widget limitations

- Widget code copied before June 27, 2013 requires visitors to your non-Wild Apricot site to have third-party cookies enabled in their browser. Widget code copied after that date will not work if third-party cookies are disabled for all sites.
- You cannot embed a widget on a page within the same Wild Apricot site.
- You cannot embed multiple Wild Apricot widgets on the same page.
- Clicking the **Forgot Password** link will take users to your Wild Apricot site.
- Links in forum subscription emails will take users to your Wild Apricot site.
- Social login buttons will not appear on the **Authorization required** system page when someone clicks the **Login** button from a widget.
- Widgets are designed for use on other websites and can't be used on your Wild Apricot website. Use gadgets instead.

On this page:

- Getting the widget code
- Changing colors and fonts
- Widget limitations

See also:

- Adding Wild Apricot functionality to other websites
- Changing the widget width
- Email subscription form

Adding Wild Apricot login boxes to another site

Adding Wild Apricot login boxes to another site

Many Wild Apricot customers only use the system for their members-only content, and have a static website that is either custom built, a third-party system, or powered by WordPress or other blogging software. This tutorial provides the code for embedding the login box on another site.

> **Please Note**
> In order to implement this, you will need to have access to editing the code of your site.

There are two parts to making the login box work:

1. Javascript code, inserted just above the </head> tag. This code makes the login box work.
2. A form for the login box, inserted where you would like the box placed on your page.

Installing the login box

1. Insert Javascript

The Javascript code needs to be referenced in the <head> section of your website, right above the </head> tag.

```
<script src="http://www.wildapricot.com/docs/scripts/waloginbox.js"></script>
```

Note for Wordpress
Wordpress users will need to edit their theme template.

For advanced users who might want to combine this script with another, the full source code is here:

```
<script>
   var browserInfo;

   (function ()
   {

     if (browserInfo == null)
     {
    browserInfo = new Object();
     }

     // Browser check
     ua = navigator.userAgent;
     browserInfo.isMSIE = (navigator.appName == "Microsoft Internet Explorer");
     browserInfo.isMSIE5 = browserInfo.isMSIE && (ua.indexOf('MSIE 5') != -1);
     browserInfo.isMSIE50 = browserInfo.isMSIE && (ua.indexOf('MSIE 5.0') != -1);
     browserInfo.isMSIE55 = browserInfo.isMSIE && (ua.indexOf('MSIE 5.5') != -1);
     browserInfo.isMSIE60 = browserInfo.isMSIE && (ua.indexOf('MSIE 6.0') != -1);
     browserInfo.isMSIE70 = browserInfo.isMSIE && (ua.indexOf('MSIE 7') != -1);
     browserInfo.isMSIE80 = browserInfo.isMSIE && (ua.indexOf('MSIE 8') != -1);
     browserInfo.isMSIE90 = browserInfo.isMSIE && (ua.indexOf('MSIE 9') != -1); // lol
     browserInfo.isGecko = ua.indexOf('Gecko') != -1;
     browserInfo.isSafari = ua.indexOf('Safari') != -1;
     browserInfo.isOpera = ua.indexOf('Opera') != -1;
     browserInfo.isWebKit = (ua.indexOf('WebKit') != -1 && window.devicePixelRatio) ?
true : false;
     browserInfo.isMac = ua.indexOf('Mac') != -1;
     browserInfo.isFirefox = ua.indexOf('Firefox') != -1;

     if (browserInfo.isFirefox)
     {
    var reVersion = /Firefox\/(\d)*\./;
    reVersion.test(ua);
    browserInfo.firefoxMajorVersion = RegExp.$1;
     }

     browserInfo.isNS7 = ua.indexOf('Netscape/7') != -1;
     browserInfo.isNS71 = ua.indexOf('Netscape/7.1') != -1;
```

```
     // Fake MSIE on Opera and if Opera fakes IE, Gecko or Safari cancel those
     if (browserInfo.isOpera)
     {
    browserInfo.isMSIE = true;
    browserInfo.isGecko = false;
    browserInfo.isSafari = false;
     }

     browserInfo.isIE = browserInfo.isMSIE;
     browserInfo.isRealIE = browserInfo.isMSIE && !browserInfo.isOpera;

     // Check if valid browser has execcommand support
     browserInfo.execCommand = (typeof (document.execCommand) != 'undefined');

     browserInfo.getBrowserCapabilitiesData = function()
     {
    var clientCookiesEnabled = false;
    var javascriptEnabled = true;
    var isPlatformCompatible = false;

    setCookie("TestClientCookie", "TestClientCookieValue");
    clientCookiesEnabled = (getCookie("TestClientCookie") == "TestClientCookieValue");
    setCookie("TestClientCookie", "", (new Date("1/1/2000")).toGMTString());
    isPlatformCompatible = javascriptEnabled && (browserInfo.isMSIE60 ||
browserInfo.isMSIE70 || browserInfo.isMSIE80 || browserInfo.isMSIE90 ||
browserInfo.isFirefox || browserInfo.isWebKit) && browserInfo.execCommand;

    return (browserInfo.isMSIE60 ? "MSIE 6.0;" : "") +
        (browserInfo.isMSIE70 ? "MSIE 7.0;" : "") +
        (browserInfo.isMSIE80 ? "MSIE 8.0;" : "") +
        (browserInfo.isMSIE90 ? "MSIE 9.0;" : "") +
        (browserInfo.isWebKit ? "WebKit;" : "") +
        (browserInfo.isFirefox ? "Firefox;" : "") +
        (browserInfo.firefoxMajorVersion ? "FirefoxMajorVersion:" +
browserInfo.firefoxMajorVersion + ";" : "") +
        (browserInfo.execCommand ? "Exec Command;" : "") +
        (clientCookiesEnabled ? "Client Cookies Enabled;" : "") +
        (isPlatformCompatible ? "Platform Compatible;" : "") +
        (javascriptEnabled ? "Javascript Enabled;" : "");

     }

     function setCookie(name, value, expires, path, domain, secure)
     {
    document.cookie = name + "=" + escape(value) +
     ((expires) ? "; expires=" + expires : "") +
     ((path) ? "; path=" + path : "") +
     ((domain) ? "; domain=" + domain : "") +
     ((secure) ? "; secure" : "");
     }

     function getCookie(name)
     {
    var cookie = " " + document.cookie;
    var search = " " + name + "=";
    var setStr = null;
    var offset = 0;
    var end = 0;
```

```
 if (cookie.length > 0)
 {
   offset = cookie.indexOf(search);
   if (offset != -1)
   {
  offset += search.length;
  end = cookie.indexOf(";", offset)
  if (end == -1)
  {
    end = cookie.length;
  }
  setStr = unescape(cookie.substring(offset, end));
   }
 }
 return (setStr);
  }

})();

window.onload = function()
{
 var browserField = document.getElementById('idLoginBoxBrowserField');
 browserField.value = browserInfo.getBrowserCapabilitiesData();
```

```
 }
</script>
```

2. Insert form code

Here is the basic login box code, which should be placed where you would like the box to be placed on your site.

> **Note: One Change Required**
> There is one bit of this code that needs to be changed in order to make it work. "localhost" needs to be replaced with your Wild Apricot site URL.
>
> So, for example, our test Wild Apricot site is http://aams.wildapricot.org.
>
> Thus, where it says "http://localhost/Sys/Login", we would change it to "http://aams.wildapricot.org/Sys/Login".

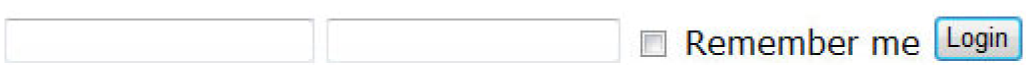
```
<!--place your site url instead of "localhost" -->
  <form action="http://localhost/Sys/Login" method="post">
   <input type="hidden" name="ReturnUrl" value="">
   <input type="hidden" name="browserData" id="idLoginBoxBrowserField">

   <input name="email" type="email" maxlength="100"/>
   <input type="password" name="password">

   <input type="checkbox" name="rememberMe" id="idLoginBoxRememberMeCheckbox">
   <label for="idLoginBoxRememberMeCheckbox">Remember me</label>
   <input type="submit" class="loginBoxLoginButton" tabindex="4" value="Login">
  </form>
```

> **Note for Wordpress**
> Wordpress users, if you have an html widget included with your theme, you can insert this form code there in order to drop the login box into sidebars, etc. You may need to style with CSS for it to display properly.
>
> If you do not have an html widget in your theme, you can also insert the code by editing the theme template.

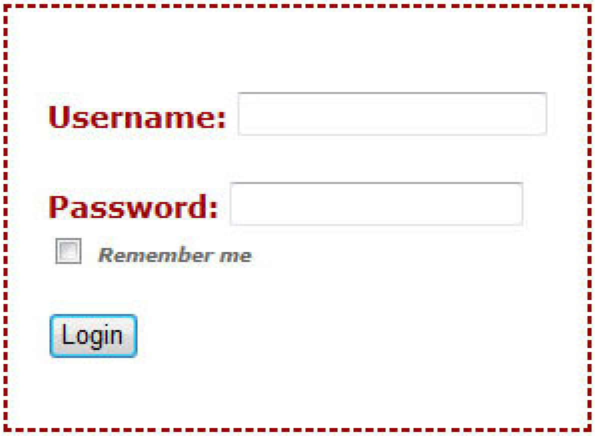
3. Style with CSS if desired

Since the login box itself is just html form code, you can apply css styles in order to change the look and feel of the login box to match your current website.

The base code for the form renders like this:



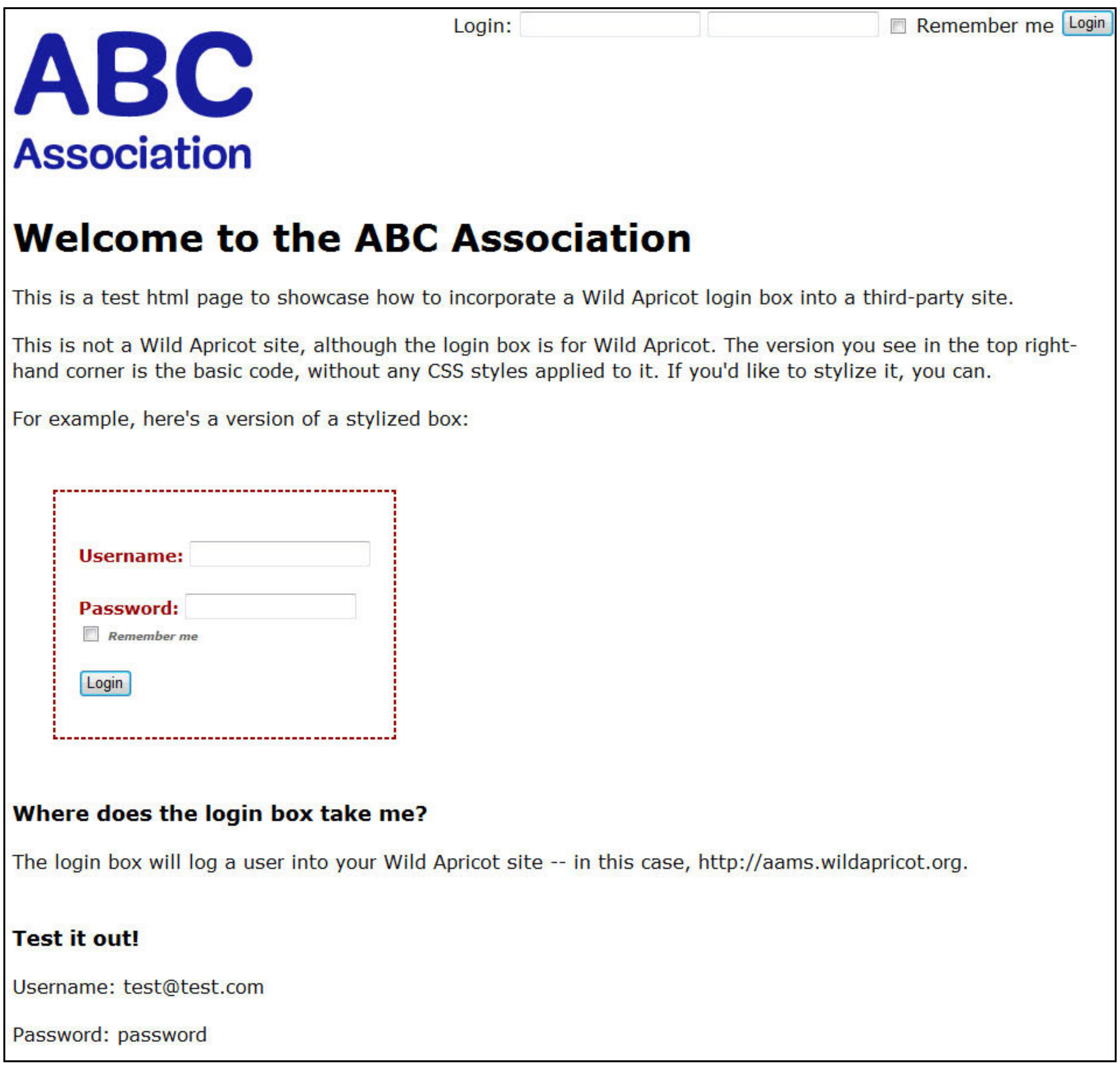
With some extra text, line breaks, and CSS styles applied, the look can be quite different. This is a style example from the test "ABC Association".



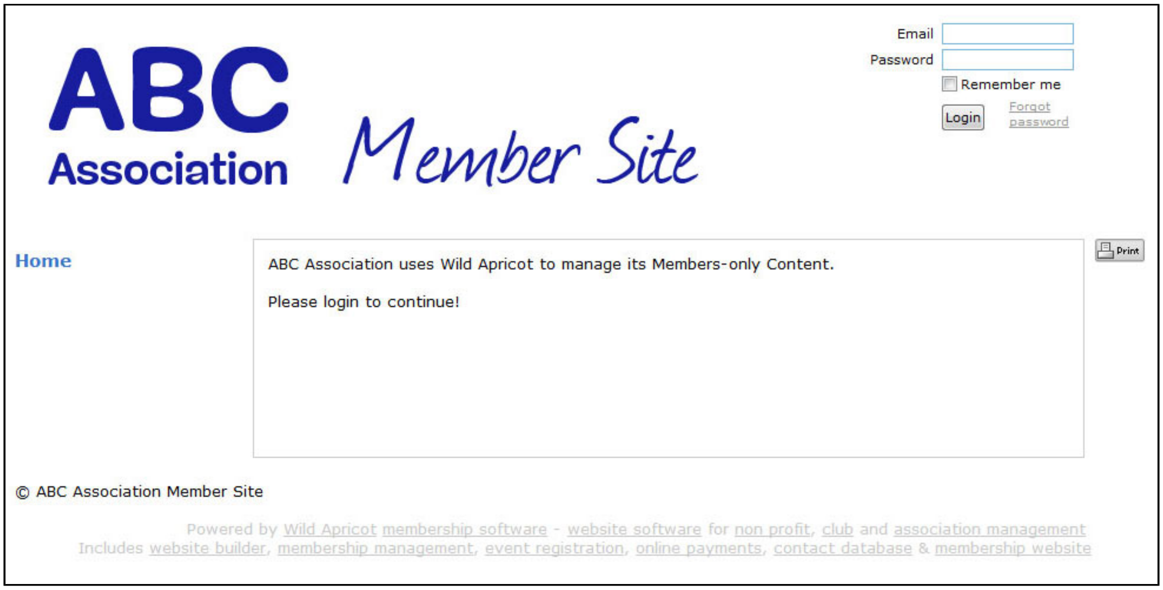
Test it

We've made an example site -- the **ABC Association** -- to illustrate how this code works.

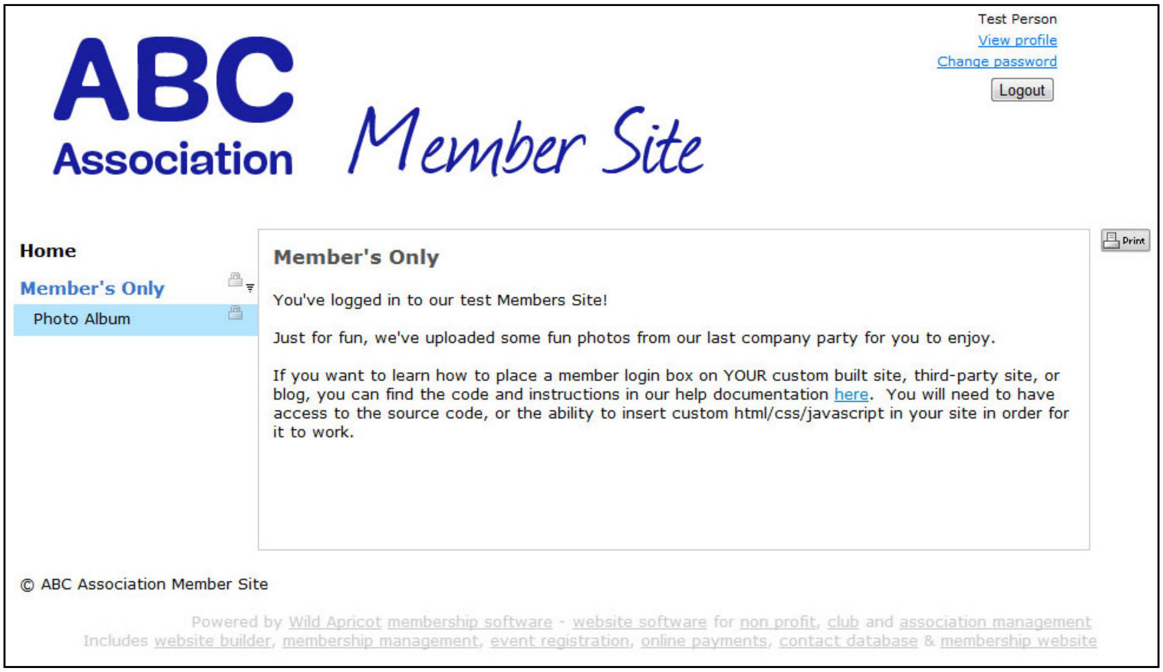
The main page of the ABC Association shows the basic code of the login box in the top right corner, and a CSS-styled version in the middle. You can apply any CSS styles to the login box to help it match the look and feel of your existing website.



We've also made a Wild Apricot member site for ABC Association, that is located at http://aams.wildapricot.org. Notice that when you click that link and are not logged in, all you see is a homepage.



Let's try logging in. Visit the ABC Association homepage, and use the login credentials for "Test Person" included on the page. You'll end up logged in to the Wild Apricot member site!



> These tutorials are intended for experienced web designers only. Wild Apricot does not provide technical support for installing or modifying these customizations.

Widget limitations

Widget limitations

- Widget code copied before June 27, 2013 requires visitors to your non-Wild Apricot site to have third-party cookies enabled in their browser. Widget code copied after that date will not work if third-party cookies are disabled for all sites.
- You cannot embed a widget on a page within the same Wild Apricot site.
- You cannot embed multiple Wild Apricot widgets on the same page.
- Clicking the **Forgot Password** link will take users to your Wild Apricot site.

- Links in forum subscription emails will take users to your Wild Apricot site.
- Social login buttons will not appear on the **Authorization required** system page when someone clicks the **Login** button from a widget.
- Widgets are designed for use on other websites and can't be used on your Wild Apricot website. Use gadgets instead.

Financial management

Financial management

Wild Apricot includes a Finances module, which you can use to track invoices generated by your organization, as well as payments collected, and refunds issued. To display the Finances module, click the **Finances** menu.

Financial management functions include the ability to:

- Automatically generate invoices for transactions on your website
- Perform self-service by your members, event registrants, donors, or anyone else, to view and pay their invoices online
- Record other payments received (e.g. cheques) or charge client credit cards (assuming that card information has been provided outside of Wild Apricot)
- View the financial transactions via the list of invoices or list of payments/refunds
- Generate instant financial reports – income report, payments report, and aging receivables
- Export your financial transactions to Excel or QuickBooks format
- Look up original transactions (e.g. membership application or event registration) that generated a particular invoice

Invoices

To view a list of your invoices, hover over the **Finances** menu and select the **Invoices** option.

Read more/less

If you are already on a different tab within the Finances module, click the **Invoices** tab.

Invoice types

Automatically generated invoices

- Most transactions on your Wild Apricot site (e.g. membership applications and renewals, event registrations) automatically generate an invoice. The exception is donations, which do not involve invoices. You can also provide for membership renewals to be automatically generated. Invoices itemize all details of the transaction (for example, a membership application with an extra cost field would have a line of the application cost and a line for each extra cost selection made).

Manually created invoices

- The administrator can also create *manual invoices* – invoices which are not linked to any transactions in Wild Apricot but to something else processed outside of Wild Apricot (e.g. to charge sponsorship fees). When the member logs in, they will see these manual invoices (in addition to any other automatically generated invoices) and they can pay for some/all of them online.

Invoice numbering

Invoices are numbered automatically based on your invoice settings.

Invoice balance

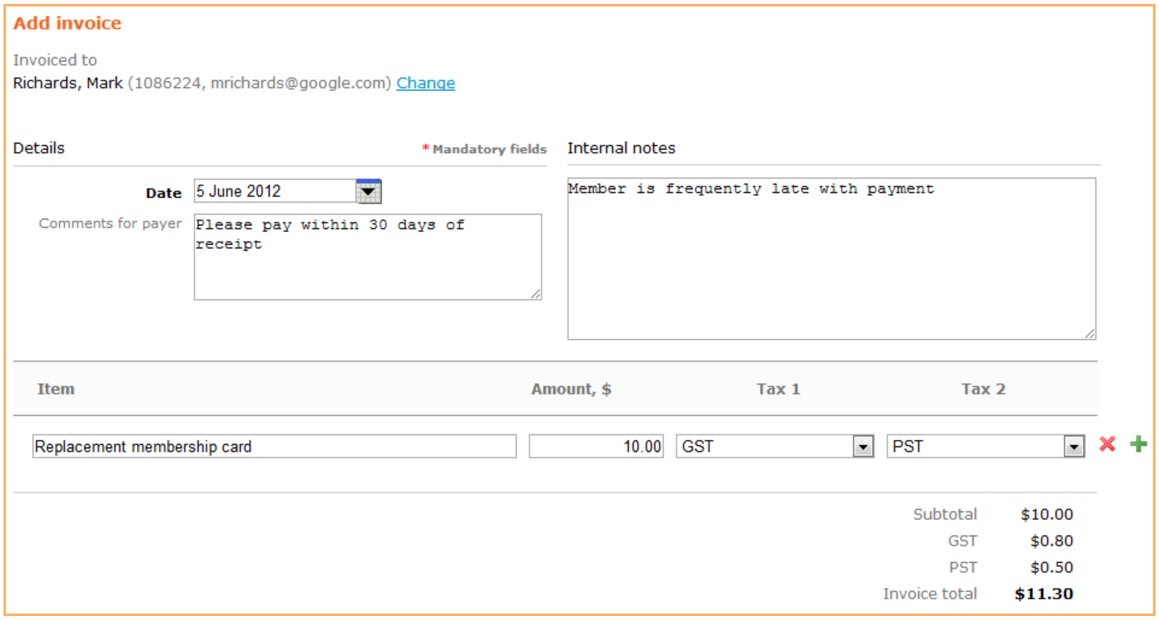
Each invoice has a balance, which is the total amount of the invoice minus all the payments settled to the invoice. As long as there is an open (outstanding) balance the administrator can record full or partial payments. Once fully paid the invoice will then show a zero balance.

Customizing and viewing invoices

The administrator can view any existing invoice, print it out, or email it at any time. Invoices are formatted according to a customizable invoice template.

The invoices can also be edited or deleted, though you have to be careful as it might lead to discrepancies between your transactions and your financial records. These changes will automatically be reflected in the member view as well.

On each invoice, you can enter internal notes or comments in the **Internal notes** field, or instructions to be display to the payer in the **Comments for payer** field.



Payments

There are two types of payments recorded in Wild Apricot: online payments, such as credit card payments, and manual or offline payments, for payments like check, cash, or wire transfer.

Read more/less

Classifying payments

Payments can be classified by tender – to record how it was received. For online payments, tender is recorded automatically (e.g. Online - Authorize.Net credit card payment). For manual payments, tender is selected when the payment is entered (e.g. Cash or Checking Account). You can customize the list of tenders as needed.

The administrator can record payments on specific invoices (these are automatically settled to this invoice, reducing its balance) or enter the payment on account, meaning that a payment can be recorded for a contact without settling it with a specific invoice. If the contact on the other hand pays online, the payment is automatically settled with all the invoices the contact paid for.

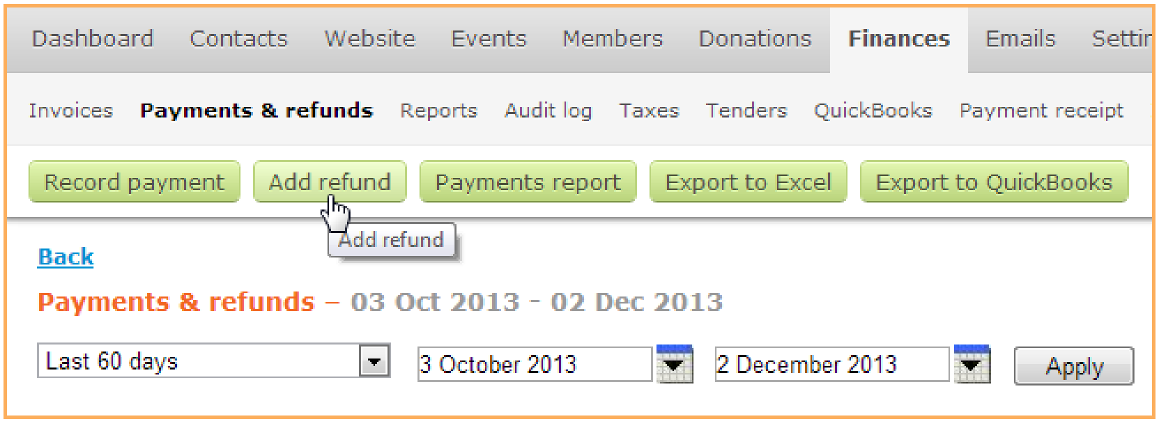
Handling special cases

Tenders can also be used for special cases. You can create a tender called *Special discounts* and record payments with this tender type. In this way, you can still include the original invoice in full into the income report, but then partially or fully discount it. These can be analyzed via the payments report.

Discounts can also be applied to membership applications using discount coupons. For more information, see Discounts and complimentary transactions.

Recording refunds

The admin can record refunds from the **Payments & refunds** screen under the **Finances** menu. The refund will automatically be reflected on the contact profile.



For more information, see Refunds.

Donations

You can set up your Wild Apricot site to accept donations, so visitors to your site can provide financial support to your organization.

Read more/less

Donations can be made through a donations page on your site or recorded manually by administrators.

Once a donation is processed, it can be modified, deleted, or refunded. You can view a list of donations by date or by donor, and export the donations records to a spreadsheet.

To track your fundraising efforts, you can add a donation goal gadget to a page on your site. The donation goal gadget displays a progress bar that measures progress towards your financial goal.

Donations do not generate invoices in Wild Apricot. Instead, donations are only recorded when the payment is received. Thus, donations do not affect contact balance, and are not settled. Also, on the contact account statement, donations are displayed in a separate column from invoices and payments and have a separate total.

Donation receipts are formatted according to a template you can customize in the system.

For more information, see Managing donations.

Taxes

You can set up sales taxes (applied on top of your prices) or VAT (included in your prices) and apply them to membership invoices, event invoices, and manual invoices (but not donations).

Read more/less

You can automatically calculate taxes and show them on invoices, and run reports to show taxes billed or collected.

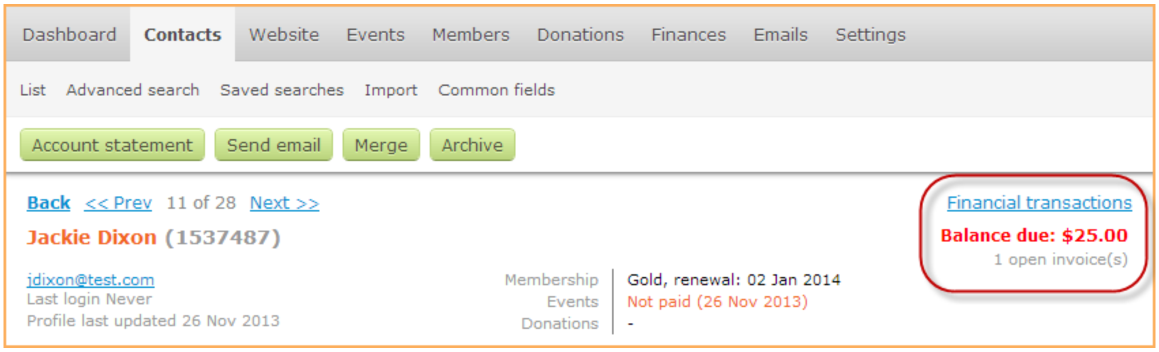
For more information, see Setting up and applying taxes.

Contact balance and account statement

Wild Apricot tracks a balance for each contact in your database – the total of all invoices, payments and refunds for that contact.

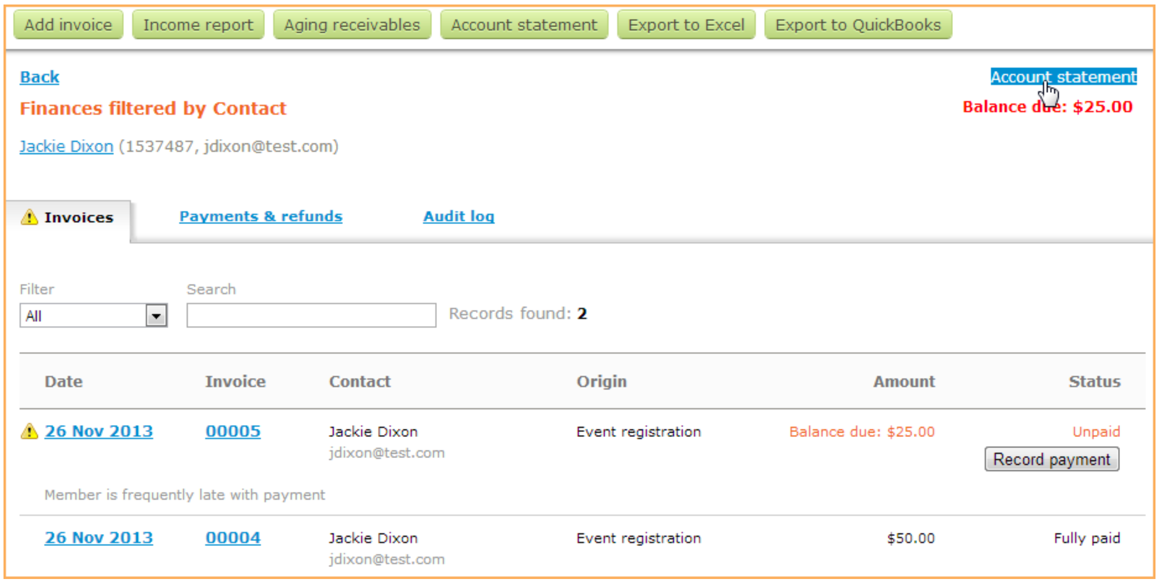
Read more/less

This balance is displayed on their contact card in the upper right hand corner. It can be zero, positive (balance due) or negative (overpaid).

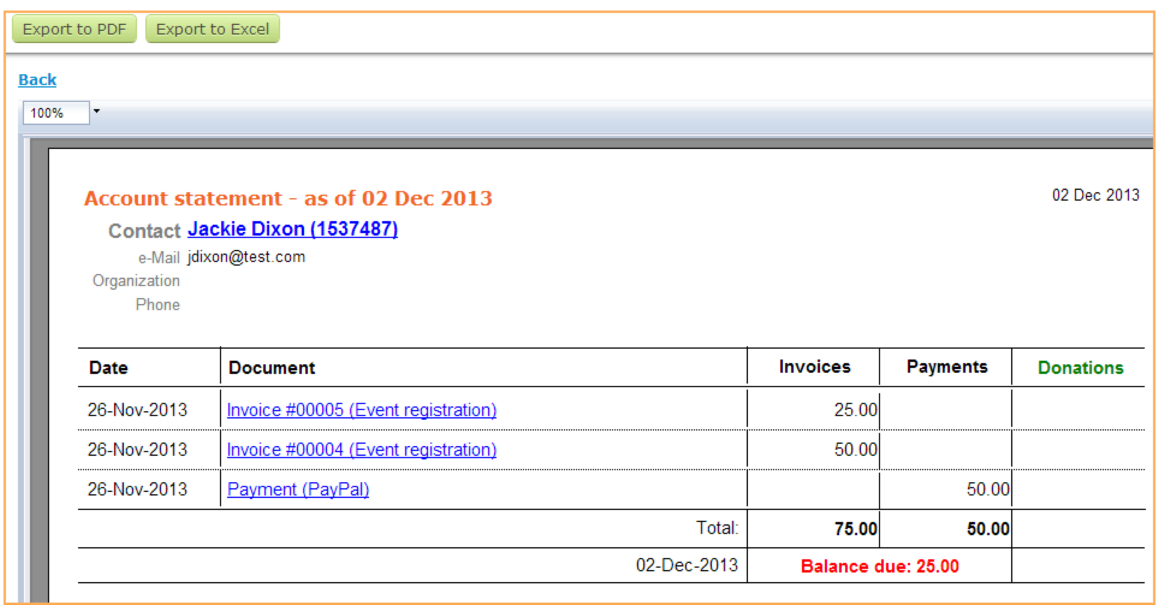


To view the transactions for this contact, click **Financial transactions**.

From the transaction list, you can produce an account statement by clicking **Account statement**.



You can export the account statement to Excel or PDF.



Settling invoices and payments

Invoices have a balance associated with them – how much of the original transaction fee they still owe to your organization.

Read more/less

Settling payments and invoices is a process of matching up specific payments and invoices. If a person paid via credit card, system automatically records a payment and settles it with the related invoice so there is no outstanding balance from that invoice. If manual payment was chosen, this will generate an invoice with an open balance. Later on, when the payment is received and recorded, it can be settled to this invoice. Manual payments can be full or partial.

Settlements can be canceled at any time (e.g. payment can be unsettled from one invoice and applied to another invoice on the same contact or left unsettled). When a settlement is canceled, the payment record itself, invoice, and transaction all stay intact.

When a payment is settled in full, the system performs all changes to the contact/member that are specified by the workflow. For example, if your members are automatically activated when paid in full, then that action takes place. Manual actions, such as approving a membership application, will still have to be done by an administrator.

Pending/incomplete transactions

Pending transactions refer to transactions that have yet to be completed – for example, invoice is not yet paid or the member application is awaiting admin approval.

Read more/less

If a member initiates a member application, renewal, or level change but does not pay the invoice (or is not yet approved), that member stays in a pending state. The member would only move into active status (with full member benefits) once the invoice is paid or if the admin manually activates them.

Similarly an event registration remains incomplete until the associated event invoice is paid for.

Using the audit log

The audit log records all the key financial transactions on your account, including:

Read more/less

- the creation of invoices and receipts
- the processing, modification, or deletion of payments
- the issuing of refunds.

The primary purpose of the audit log is for troubleshooting – to help you figure out why a particular transaction took place.

Financial reports

You can generate various financial reports to help you manage your organization's finances, including:

Read more/less

- Income report – summary of your income based on the invoices in the system within a selected period and by transaction type.
- Payments report – summary of payments, donations and refunds, in other words your cashflow transactions. Based on the payments and refunds in the system, within a selected period and by tender type.
- Aging receivables – list of all contacts with outstanding balances classified by outstanding days.
- Account statement – statement report for a particular account – list and totals of invoices, payments, refunds and donations.
- Tax reports – for taxes billed and collected during different time periods.

You can also generate financial reports specific to donations and events from other Wild Apricot modules.

Webinar: Managing Your Organization's

Finances (20:45)

On this page:

- Invoices
- Payments
- Donations
- Taxes
- Contact balance and account statement
- Settling invoices and payments
- Pending/incomplete transactions
- Using the audit log
- Financial reports

Expand all sections

See also:

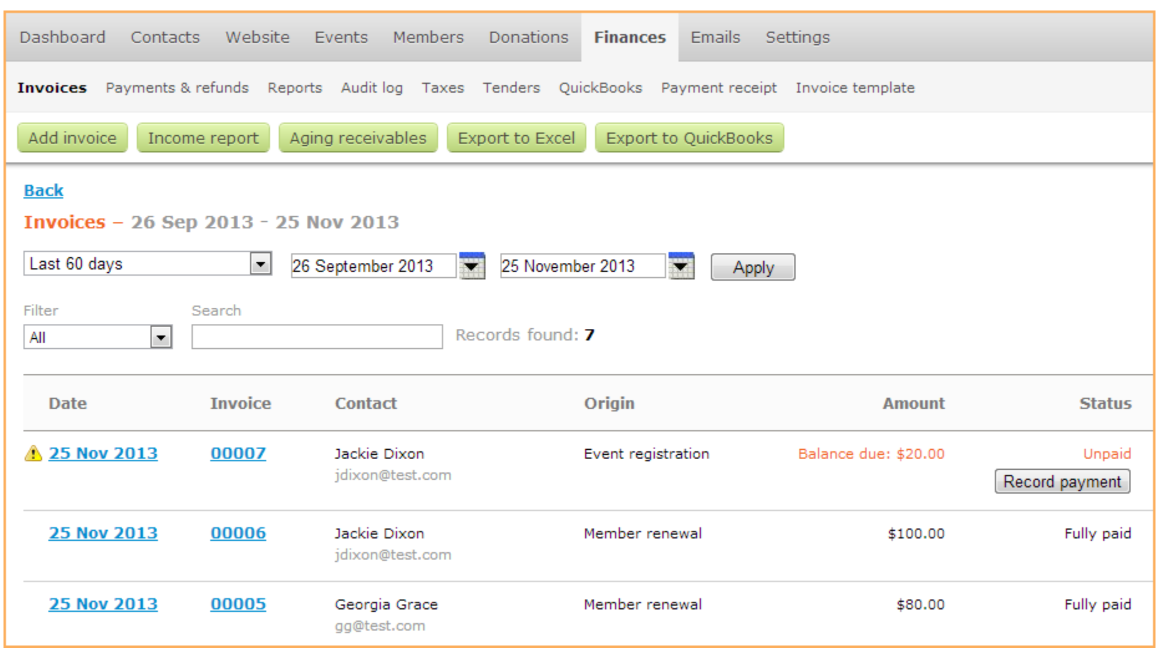
- Invoices
- Payments
- Refunds
- Managing donations
- Setting up and applying taxes
- Settling payments and invoices
- Financial reports

Invoices

Invoices

Most transactions on your Wild Apricot site (e.g. membership applications and renewals, event registrations) automatically generate an invoice. The exception is donations, which do not involve invoices.

To view a list of your invoices, hover over the **Finances** menu and select the **Invoices** option. If you are already on a different tab within the Finances module, click the **Invoices** tab.



Deleted invoices are not shown in the list. You can find deleted invoices in the audit log by performing keyword searches on invoice numbers.

Each invoice has a balance – total amount of the invoice minus all the payments settled to it. If an invoice has a zero balance, it will be marked as fully paid.

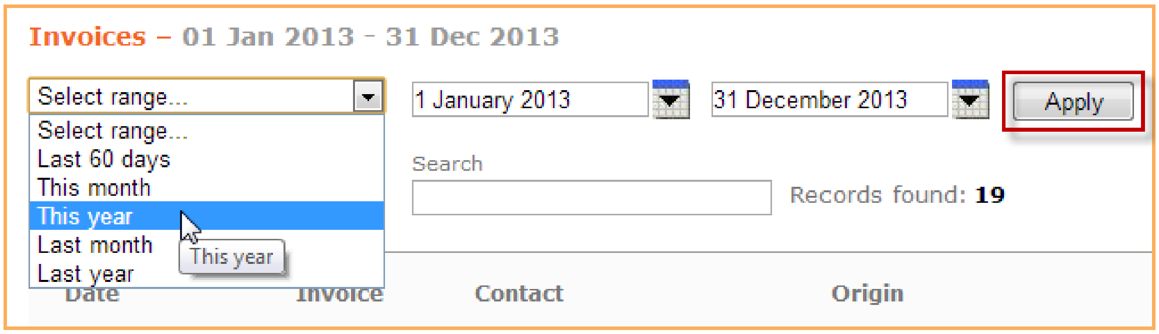
The **Origin** field indicates whether it is a manual invoice (one not automatically generated by transactions on the site) or an automated invoice related to an online transaction (e.g. membership application, event registration).

For information on setting invoice numbers and controlling the emailing of invoices, see Customizing invoices and receipts.

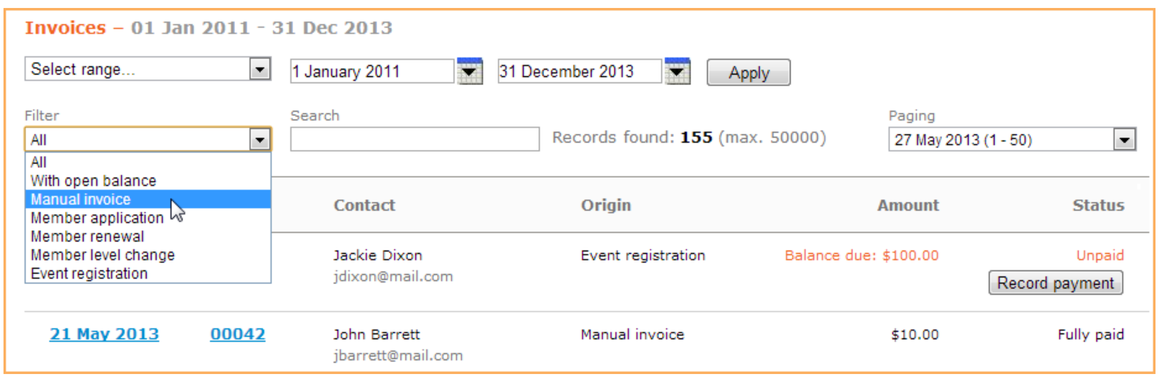
Searching and filtering the invoice list

You can search the invoice list in a number of ways.
Read more/less

- You can select a predefined date range or set one of your own.



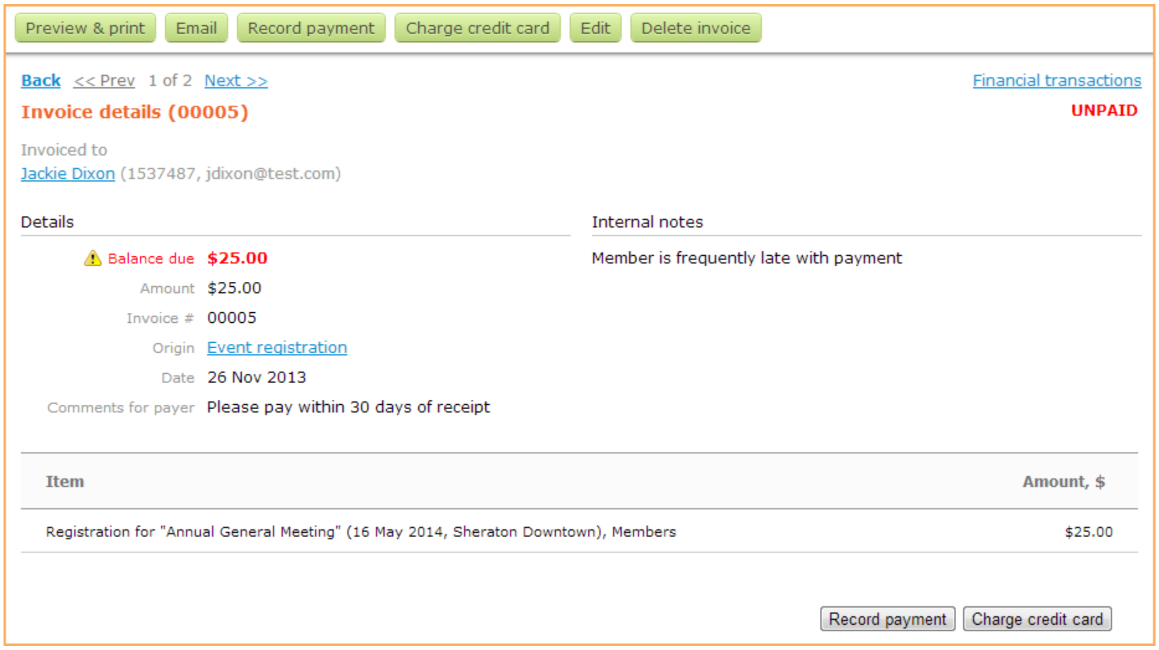
- You can select one of the predefined filters. For example, if you select the With open balance filter, it will show all outstanding invoices.



- You can perform a keyword search. For example, you could type in a member's name to see the list of all corresponding invoices for this member, or enter an invoice number to view a particular invoice.

Invoice details

To view the details of a particular invoice, click it within the invoice list.
Read more/less



From the invoice details, you can record and settle the payment for any invoice with an open balance by clicking the **Record payment** button, either from the invoice details or the invoice list.

If a contact has provided you with their credit card and billing information outside of Wild Apricot – and you using either PayPal Payments Pro or Authorize.Net as your payment system – you can click the **Charge credit card** button to process a charge on this person's credit card. (See Processing credit card option for administrator.)

You can also print or email the invoice to the contact.

You can modify or delete the invoice, though you have to be careful as it might lead to discrepancies between your transactions and your financial records.

A record of all invoice edits and deletions can be found in the audit log.

Using the **Prev** and **Next** buttons, you can browse through other invoices within the list.

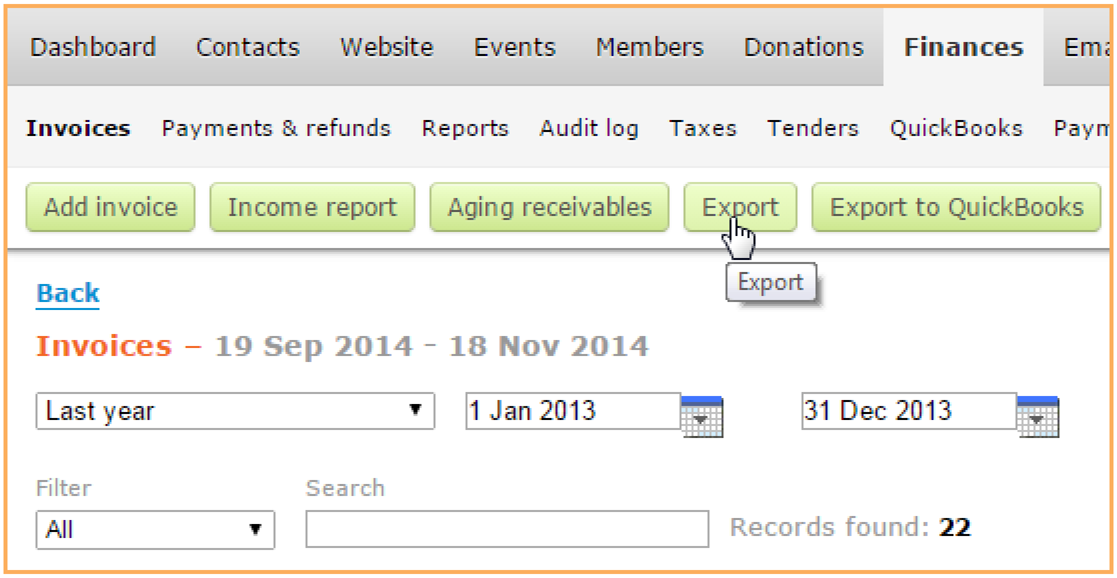
Exporting invoices

You can export your invoices – as they appear on your invoices list – to a spreadsheet file. You can also export your invoices and other financial data to QuickBooks .

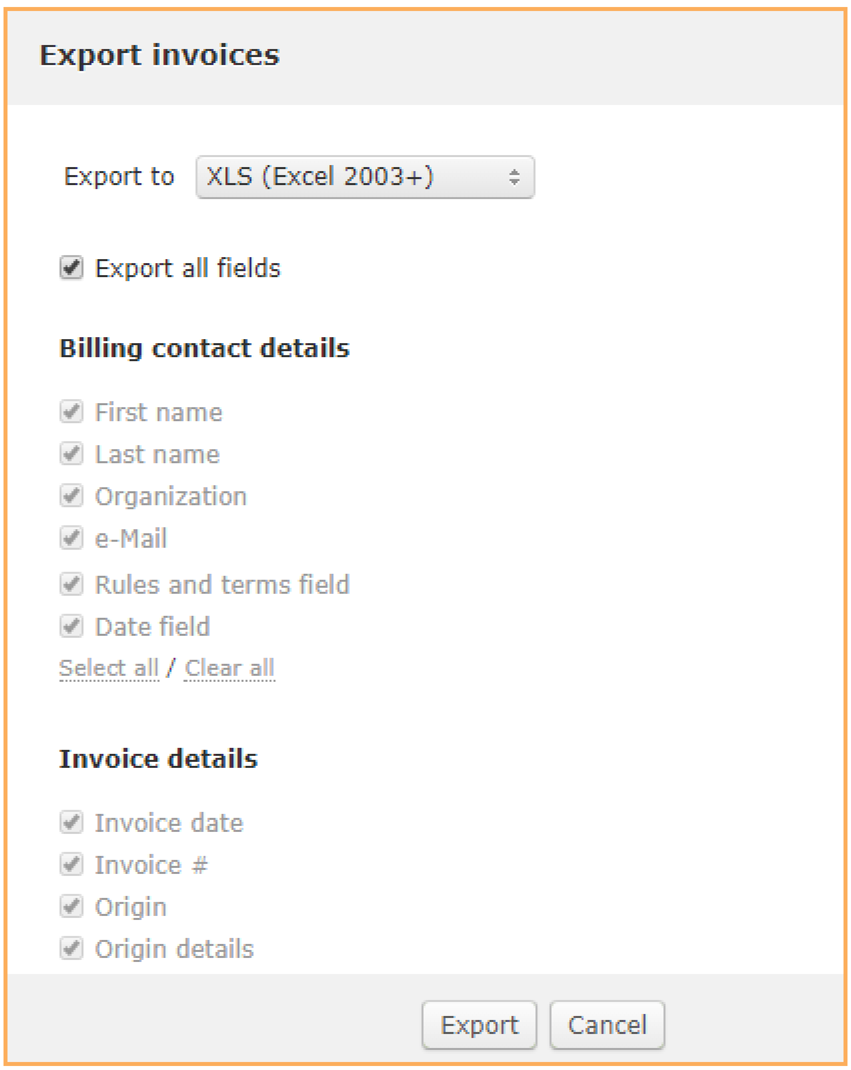
Read more/less

To export your invoices to a spreadsheet file, follow these steps:

1. Filter your invoices list to display only those invoices you want to export.
2. Click the **Export** button.



3. On the screen that appears, select the export file format – XLS, CSV, or XML.
4. Choose which fields to include in the export file.



5. Click the **Export** button.

While the export file is being generated, you can click the **Continue working** button and safely switch to another Wild Apricot admin screen. Once the file is generated, you'll receive an email with a link to the file.

If you waited until the export file was generated, the file will be automatically downloaded. As well, a dialog with a link to the file will appear, and an email with the link will be sent to you.

Before clicking the download link within the email, make sure you are logged into your Wild Apricot account as an administrator , and in admin view.

Issuing manual invoices

To track additional transactions that you have processed outside of your Wild Apricot website – for example, charging a fee for an advertisement on your site – you can create a manual invoice . Members can log in to Wild Apricot and pay manual invoices from their profile.

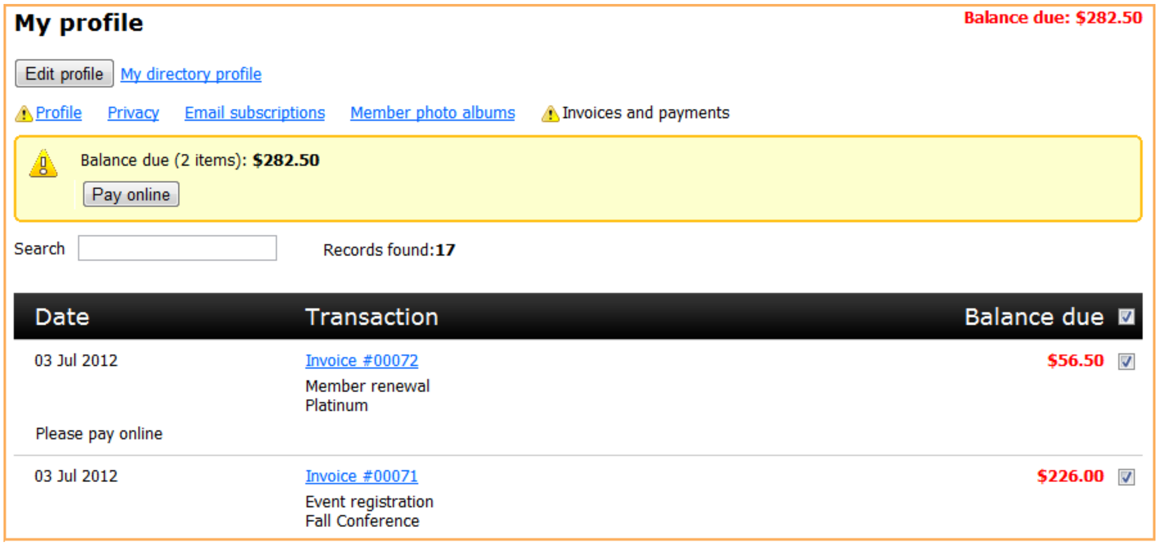
Self-service for members

From your Wild Apricot site, visitors can apply and pay for membership, renew their membership, sign up for events, and make donations.

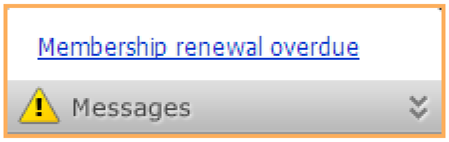
Read more/less

When someone performs a self-service transaction, an invoice is automatically generated and emailed to the person.

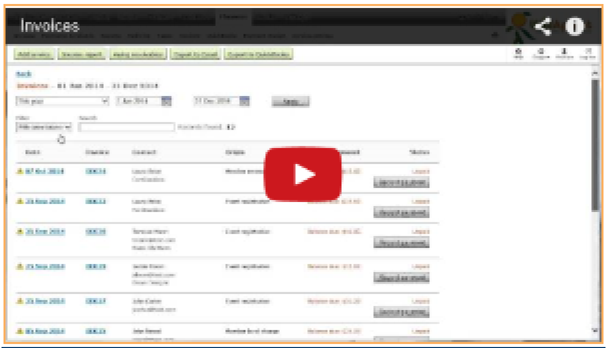
From their profile, contacts can view their financial history, including all invoices and payments. Invoices with open balances – those that unpaid or partially paid – will be shown at the top of the Invoices and payments screen.



A message will appear in the bottom right corner if the member has unpaid invoices or incomplete registrations, or if the member is lapsed, overdue, or within a week of their renewal date.



Contacts can pay any unpaid invoices by selecting one or more invoices then clicking the **Pay online** button.



[Video: Invoices](#) (4:51)

On this page:

- Searching and filtering the invoice list
- Invoice details
- Exporting invoices
- Issuing manual invoices
- Self-service for members

Expand all sections

See also:

- Customizing invoices and receipts
- Payments
- Issuing manual invoices
- Record payment and settle to invoice
- Recording credits or payments on account
- Discounts and complimentary transactions
- View account history and pay invoices
- Adjusting, voiding, and deleting invoices

Finding an invoice

Finding an invoice

If you need to locate a particular invoice, there are two ways to do it.

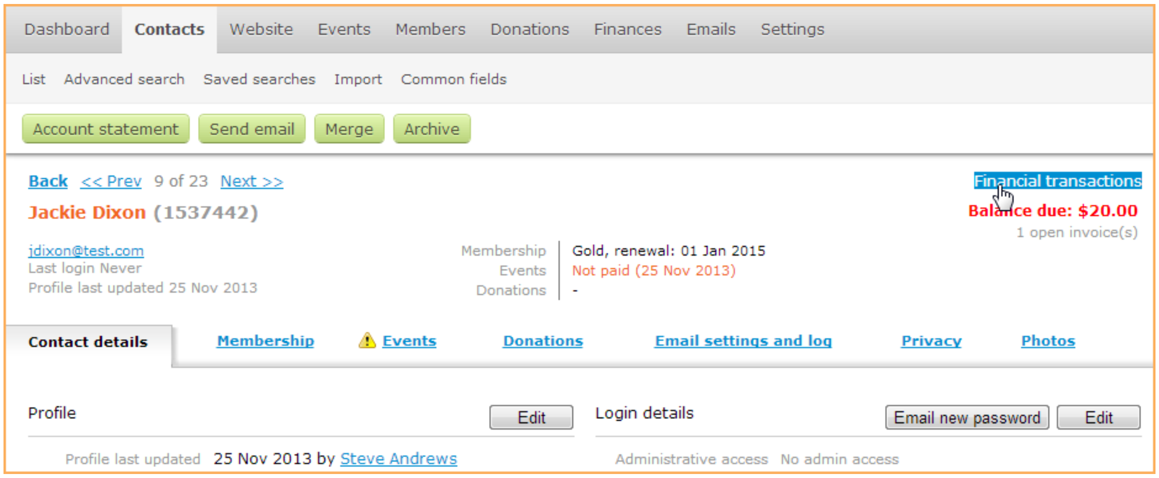
- If you know which person the invoice was issued to, you can search for it from that person's contact record.
- If you do not know who the invoice was issued to, you can search through all invoices using the invoice date, invoice number, internal notes, or any other information you may have.

Listing invoices for a particular person

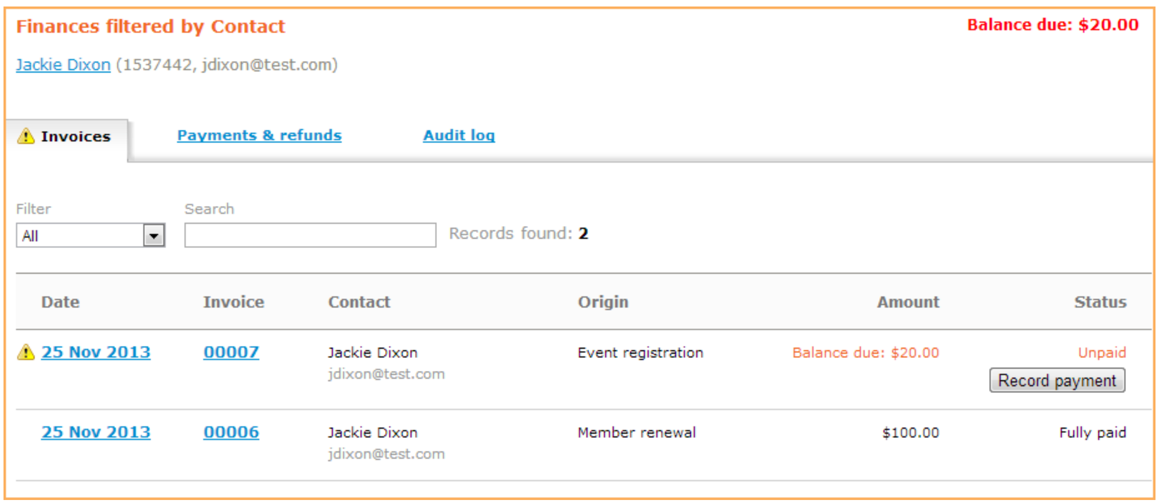
If you know who the invoice was created for, follow these steps to display a particular invoice.

Read more/less

1. Hover over the **Contacts** menu and select the **List** option.
2. Find the person within the contact list.
3. Click the contact within the list to display their contact record.
4. Within the contact record, click the **Financial transactions** link at the top right.



All invoices belonging to the contact will be listed. The number of invoices found appears to the right. Any notes that were added to invoices will appear below them on the results page. If there is an outstanding balance, an exclamation mark icon will appear in front of the date, and a **Record payment** button will appear under the Status column.



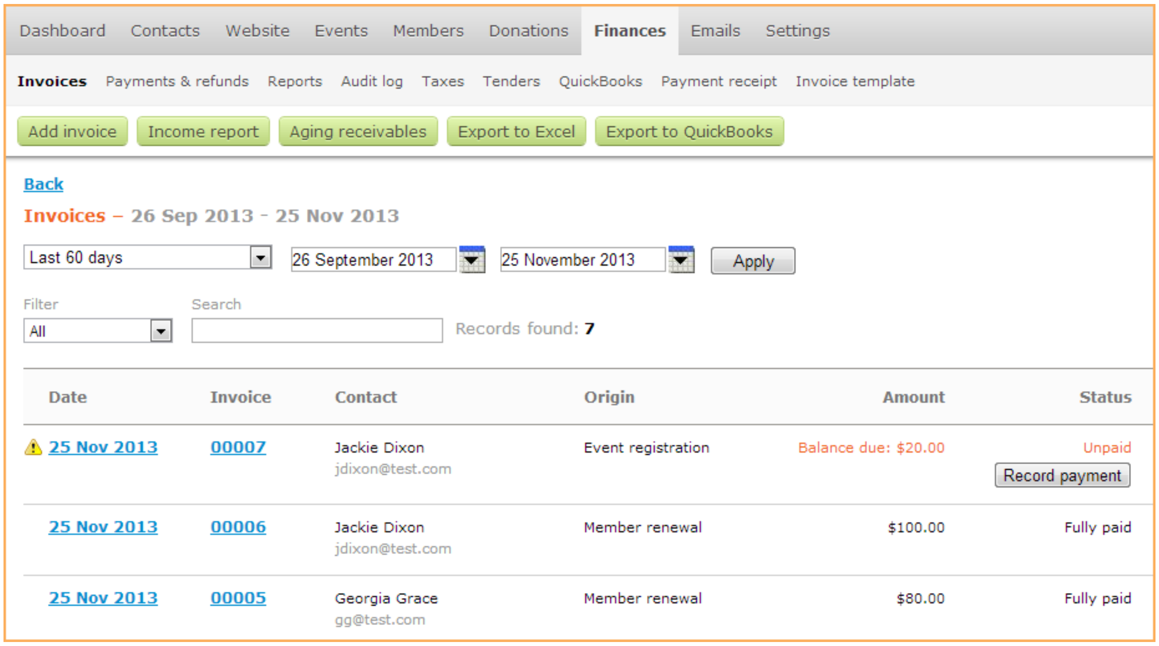
5. You can filter the list by clicking the **Filter** drop-down and selecting the type of invoice you want to display, and by entering a keyword in the **Search** field.
6. Once you have found the invoice you are looking for within the list, click on it to display the invoice details.

Listing all invoices

If you want to find a particular invoice but you do not know who the invoice was issued to, you can display all invoices then filter the list using what you know about the invoice.

Read more/less

To list all your invoices, hover over the **Finances** tab and select the **Invoices** option.



The number of invoices found appears to the right.

For each invoice, the following information is displayed:

- The date the invoice was issued
- The invoice number
- The contact
- How the invoice originated
- The amount of the invoice
- The status of the invoice

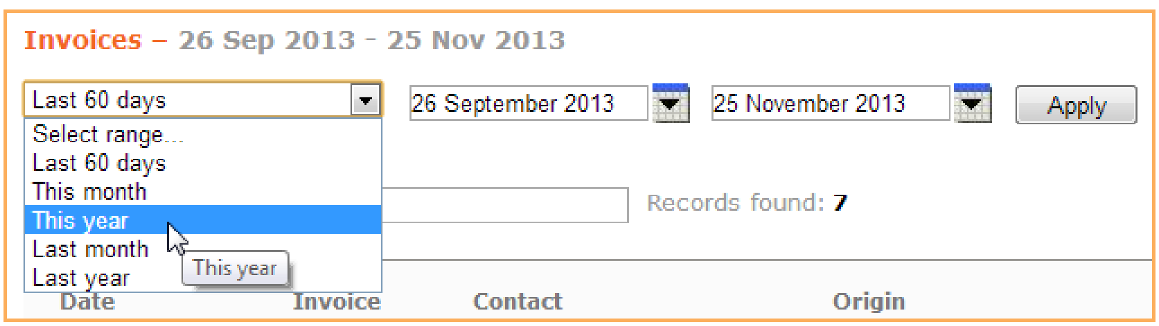
Any notes that were added to invoices will appear below them on the results page. If there is an outstanding balance, an exclamation mark icon will appear in front of the date, and a **Record payment** button will appear under the Status column.

Filtering the invoices list

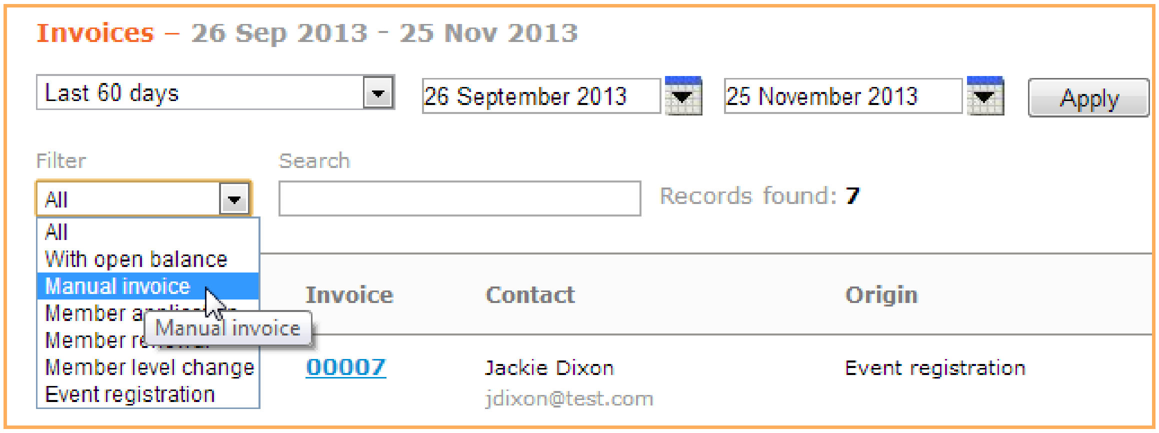
You can filter the invoices list by date, by invoice type, or by entering a search keyword.

Read more/less

To filter by date, choose a range from the **Select range** list, or select your own date range using the calendar controls, then click **Apply** .



To filter the list by invoice type, click the **Filter** list and choose the invoice type.



You can further filter the list by entering a keyword or phrase in the **Search** field. You could, for example, enter the invoice number. Only those records that match the word or phrase will be listed.

Once you have found the invoice you are looking for, you can click on it to view the invoice details.

On this page:

- Listing invoices for a particular person
- Listing all invoices
- Filtering the invoices list

Expand all sections

See also:

- Invoices
- Payments
- Recording payments and credits, and settling invoices

Issuing manual invoices

Issuing manual invoices

When you need to charge for activities that are not automatically invoiced by Wild Apricot, you can create a manual invoice. Members can log in to Wild Apricot and pay these manual invoices from their profile, or an administrator can record a manual payment and settle the payment to the invoice .

Creating a manual invoice

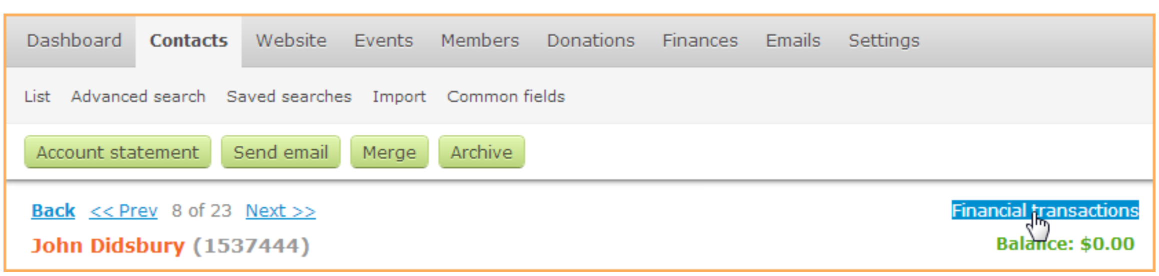
There are two ways to create a manual invoice: from a contact's details, and from the **Finances** module.

From a contact's details

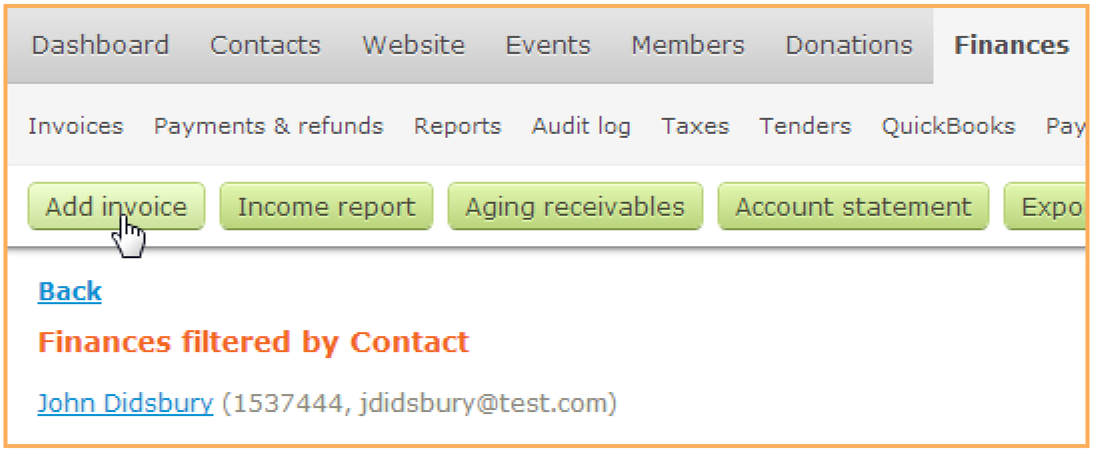
Read more/less

To create a manual invoice from a contact's details:

1. Click the **Financial transactions** link in the upper right corner of the details page.



2. Click the **Add invoice** button.



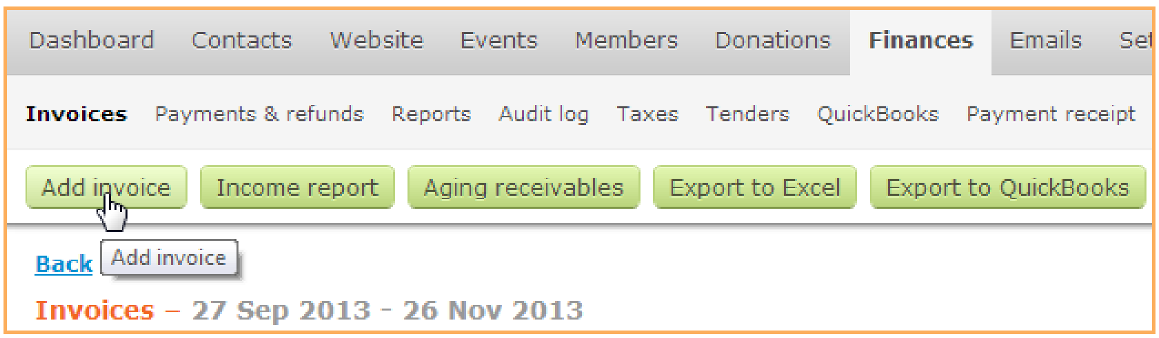
3. You can now enter invoice details and finalize the invoice. See Entering invoice details (below).

From the Finances module

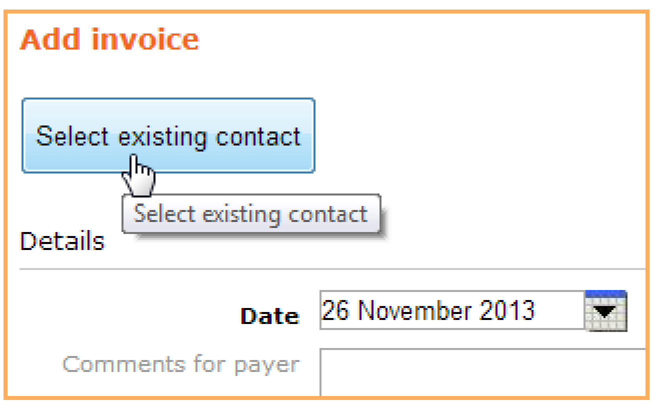
Read more/less

To create a manual invoice from the **Finances** module:

1. Hover over the **Finances** menu and click the **Invoices** option.
2. Click the **Add invoice** button.



3. Click **Select existing contact**.



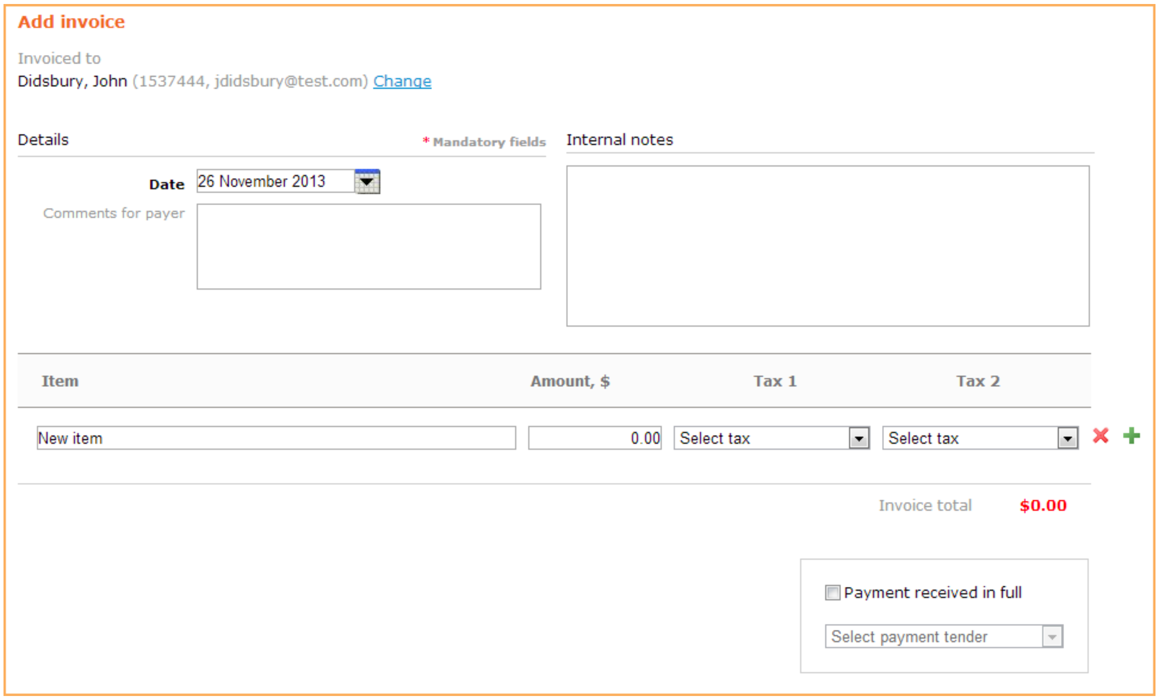
4. Choose the contact to be invoiced then click the **Select** button.
5. You can now enter invoice details and finalize the invoice. See Entering invoice details (below).

Entering invoice details

From the **Add invoice** screen, you can enter invoice details and finalize the invoice.

Read more/less

After selecting the contact to be invoiced and clicking the **Add invoice** button (in whichever order), the **Add invoice** screen appears.



From here, you can enter invoice details and finalize the invoice. For event registrations, and membership applications and renewals, you can assign the invoice to a different contact before saving by clicking the **Change** link.

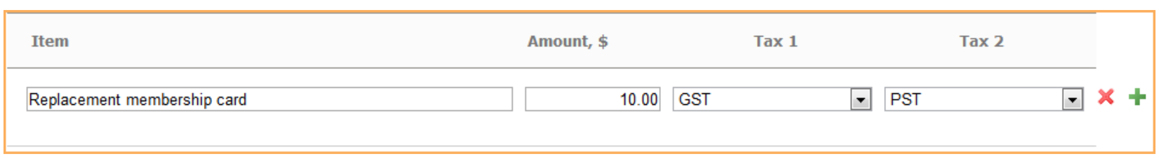
Under **Details**, you can set the date of the invoice, either in the past or future, and enter comments that appear on the final invoice. Under **Internal notes** you add any comments or notes you may have about the invoice. These notes are only visible to the administrator on the invoice list and invoice details screens, and are searchable.

Adding invoice items

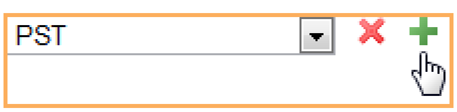
In the bottom half of the **Add invoice** screen, you can add line items to the invoice.

Read more/less

Enter the name of the item in the first text box, and the cost of the item in the second box. Then, you can select up to two taxes for the transaction.

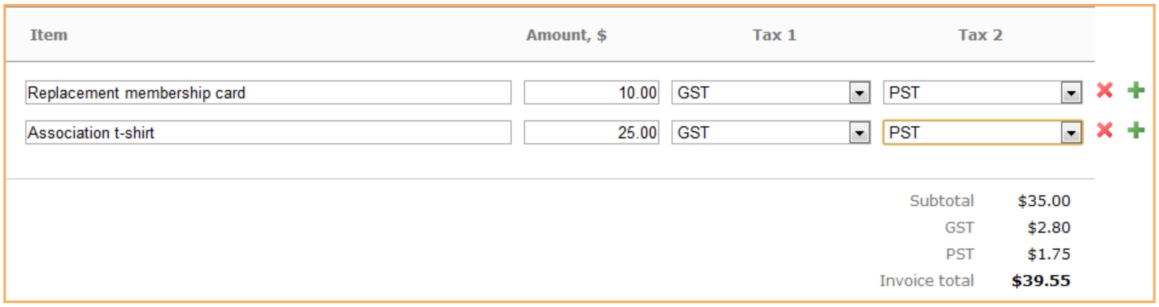


To add another line item, click the green plus sign beside the last item.

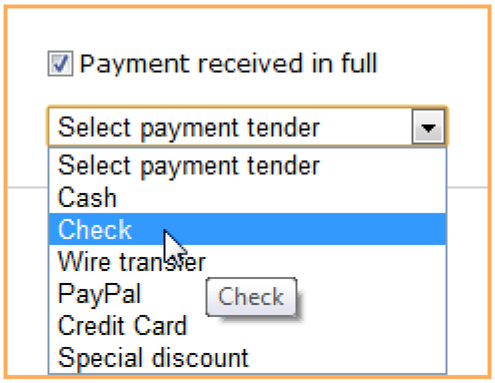


To remove a line item, click the red X.

The total will be automatically calculated and displayed below.



If you have already been paid in full, check the **Payment received in full** checkbox and select the payment tender. Otherwise, payment will be automatically recorded once the invoice is paid online – or you can record the payment manually once received (see Recording payments and credits, and settling invoices).



When you are done creating the invoice, click **Save**. After you have saved the invoice, you have the following options:

Option	Description
Preview & print	View, print, or email the client copy of the invoice to the contact (see Emailing or printing invoices and receipts).
Email	Email the invoice without previewing it.
Record payment	Record and settle the payment (see Record payment and settle to invoice).
Charge credit card	Process a charge on this person's credit card (assuming that full credit card and billing information has been provided to you outside of Wild Apricot). See Processing credit card option for administrator.
Edit	Make changes to the invoice (see Adjusting, voiding, and deleting invoices).
Delete invoice	Cancel the invoice (see Adjusting, voiding, and deleting invoices) .

The invoice is now available to the contact from their profile. From there, they can pay the invoice (see View account history and pay invoices).

On this page:

Expand all sections

See also:

- Invoices
- Recording payments and credits, and settling invoices
- Processing credit card option for administrator

Adjusting, voiding, and deleting invoices

Adjusting, voiding, and deleting invoices

There are two ways to adjust an invoice. You can edit the invoice directly or edit the original transaction then adjust the updated invoice. Directly editing the invoice is advised only for manual invoices but not for automatically generated invoices because this will lead to discrepancies between the original transaction and its invoice.

If you want to remove an erroneous transaction, the recommended approach is to go to the transaction in question (e.g. event registration) and delete or cancel the transaction.

If you want to reduce the invoice amount because of a special discount, the recommended way is to create a special tender and record a payment using that tender. For more information, see Discounts and complimentary transactions.

If you want to cancel an invoice, you can void it, thereby preserving historical information for any future audits. After voiding an invoice, you can delete it if you don't want to preserve a record of the invoice.

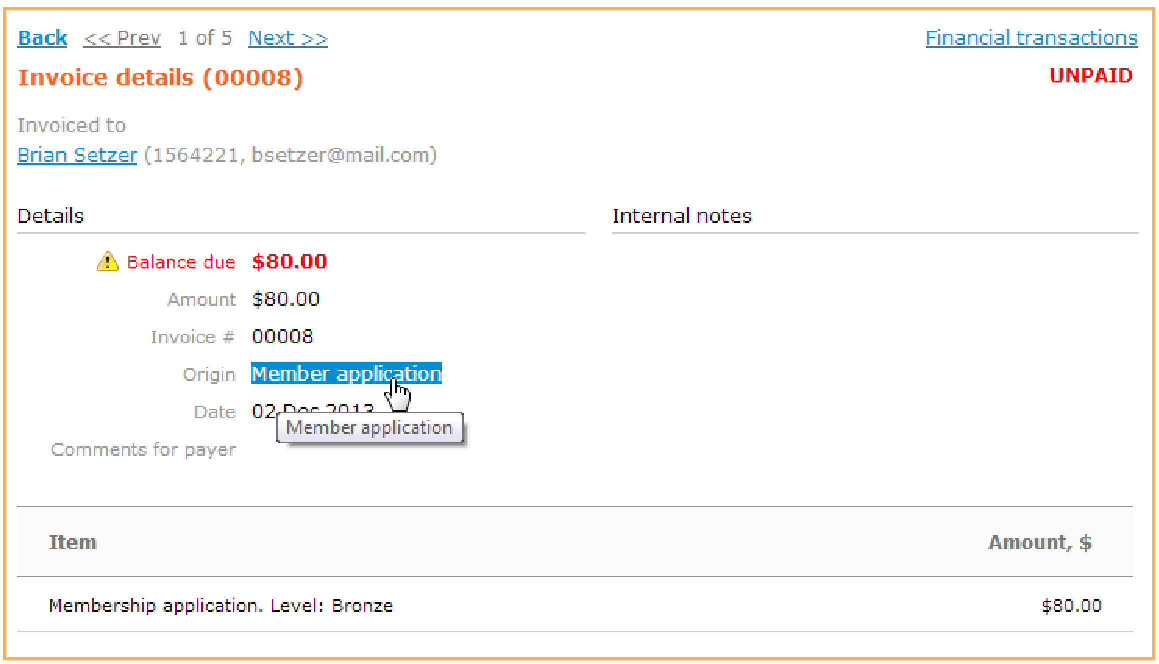
Updating an invoice by adjusting the original transaction

You can update an invoice by adjusting the original transaction.

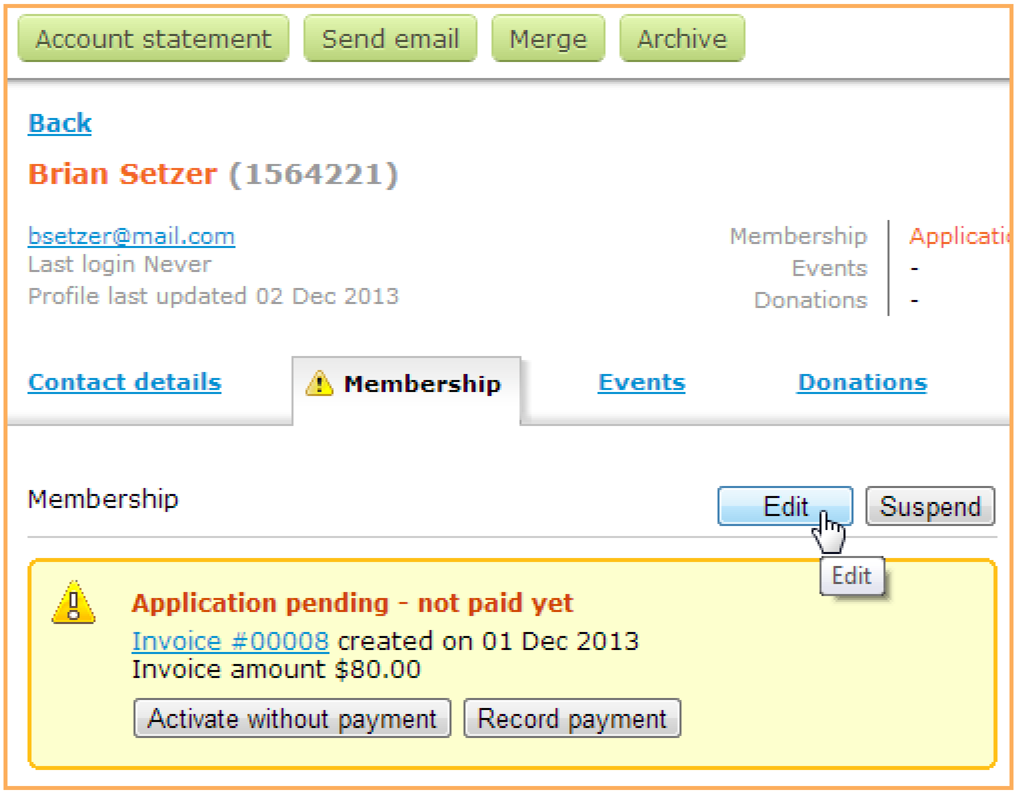
Read more/less

To adjust the original transaction, follow these steps:

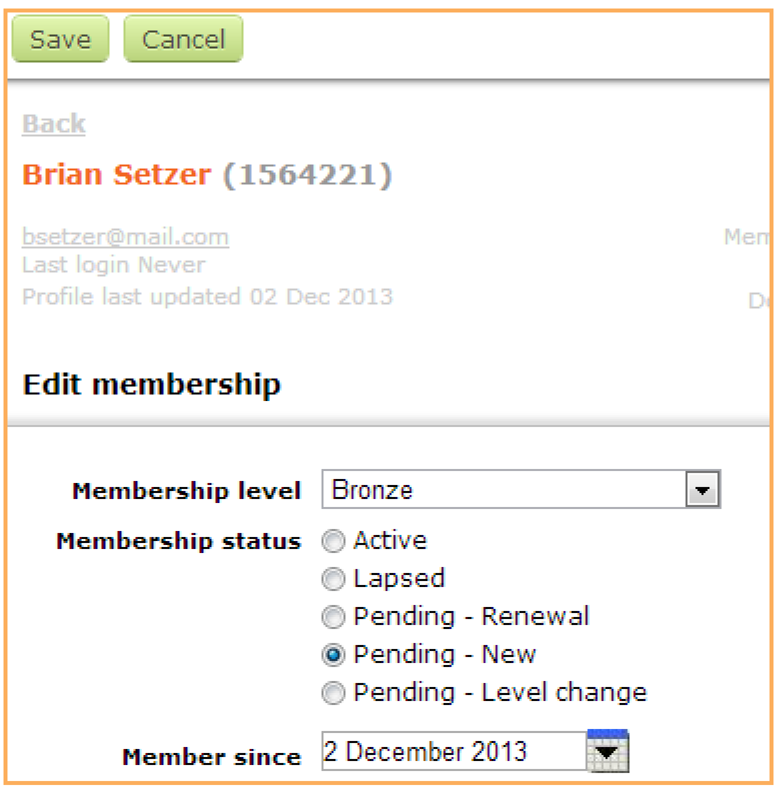
1. Find and open the invoice.
2. Click the **Origin** link to display the transaction.



3. From here, click the **Edit** button to enter edit mode.

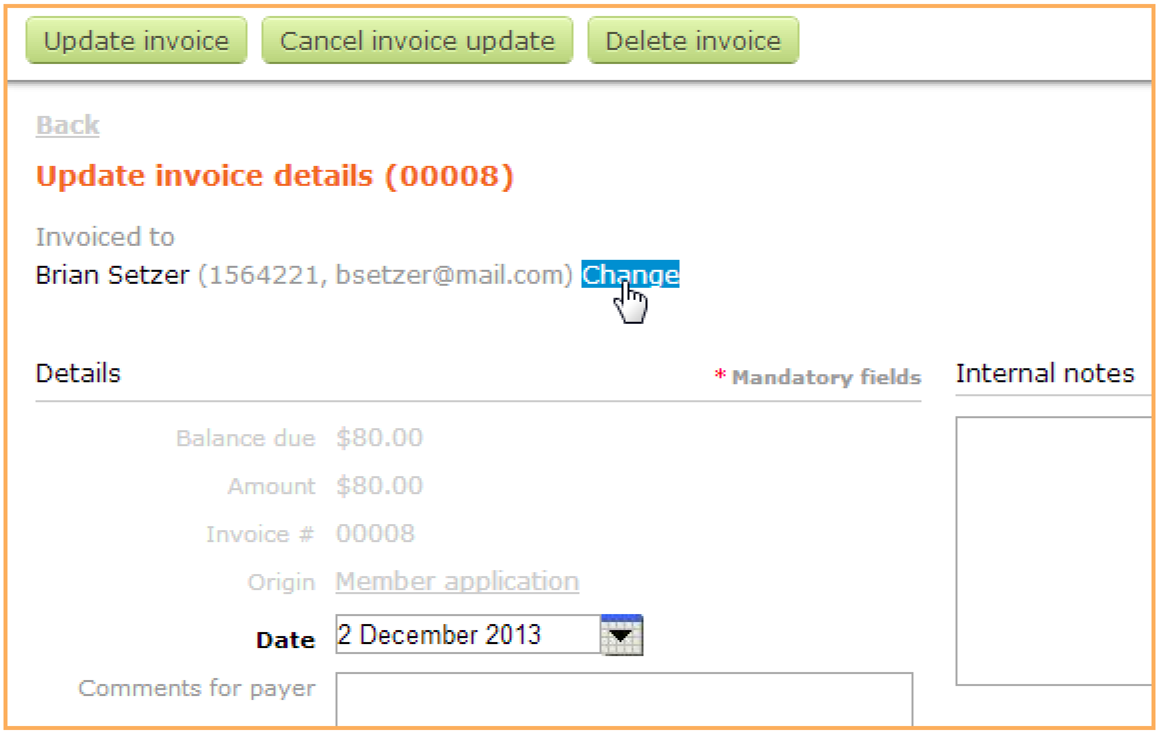


4. Now you can change the information that was entered. For example, if it is a member application, you can change the membership level.



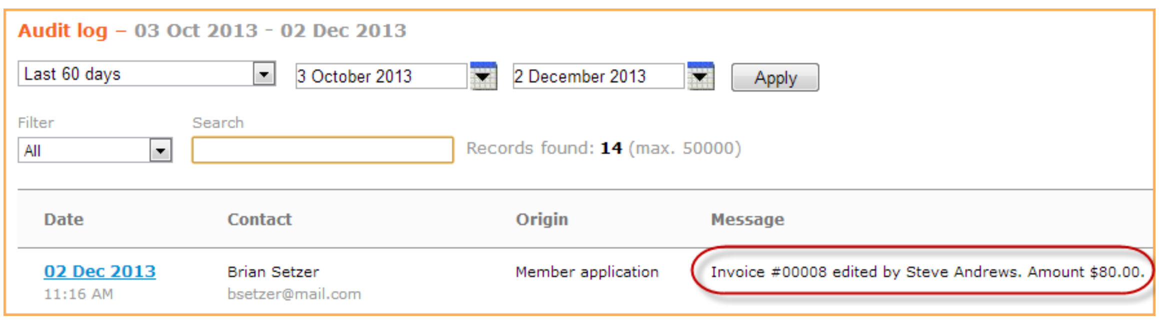
5. Once you are done editing, click on **Save** to display the **Update invoice details** screen.
6. On the **Update invoice** screen, the line items listed on the invoice will have been updated to reflect the changes you made on the previous screen. You can change the line items manually on this screen but this will lead to discrepancies between transactions and invoices and is therefore not recommended.

To assign the invoice to a different contact, click the **Change** link beside the contact's details.



7. Click on **Update invoice** to save the changes and update the contact's balance. You can then print or email the updated invoice.

Changing the transaction will create a record in your Audit log showing the contact affected, the date, the invoice number, and the amount of the updated invoice.



Changing the transaction will also effect your income report, updating your numbers to reflect the new invoice amount.

Editing an invoice directly

Instead of updating the original transaction, you can edit an invoice directly.

Read more/less

For each invoice, you can modify the following information:

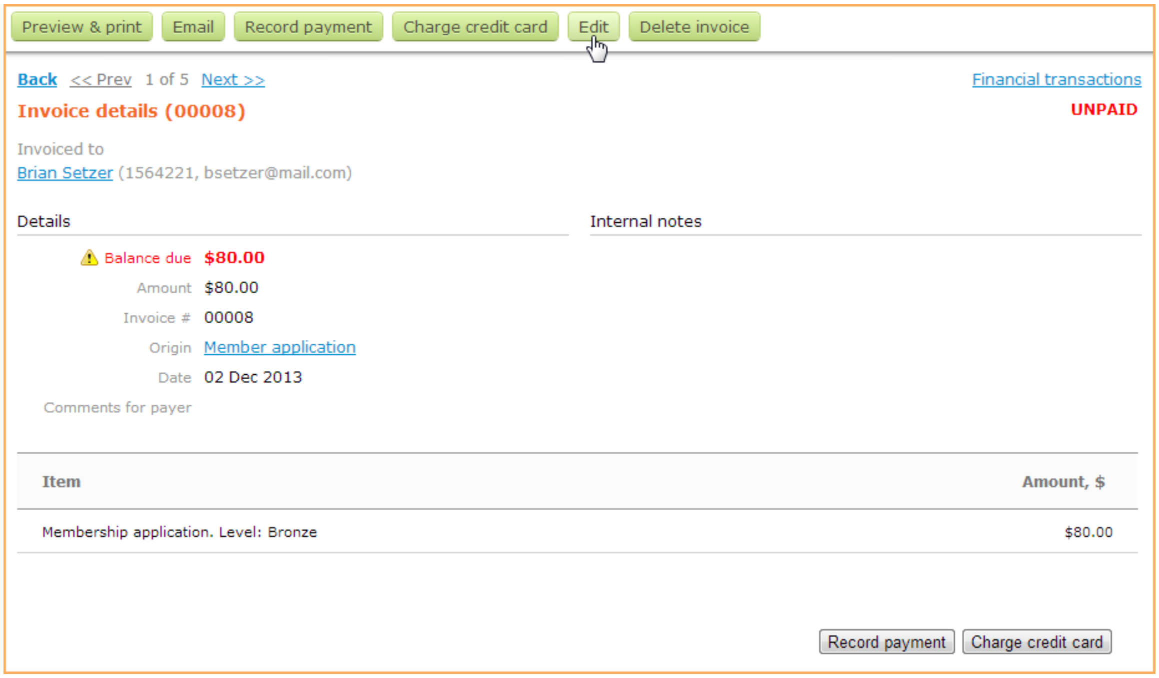
- the person being invoiced
- the date of the invoice
- comments for the payer
- internal notes
- invoice items

Editing an invoice directly (without updating the transaction) is only recommended for manual invoices. If you edit the invoice that has a corresponding transaction and do not update that transaction as well, the transaction amount might not be equal to the invoice amount.

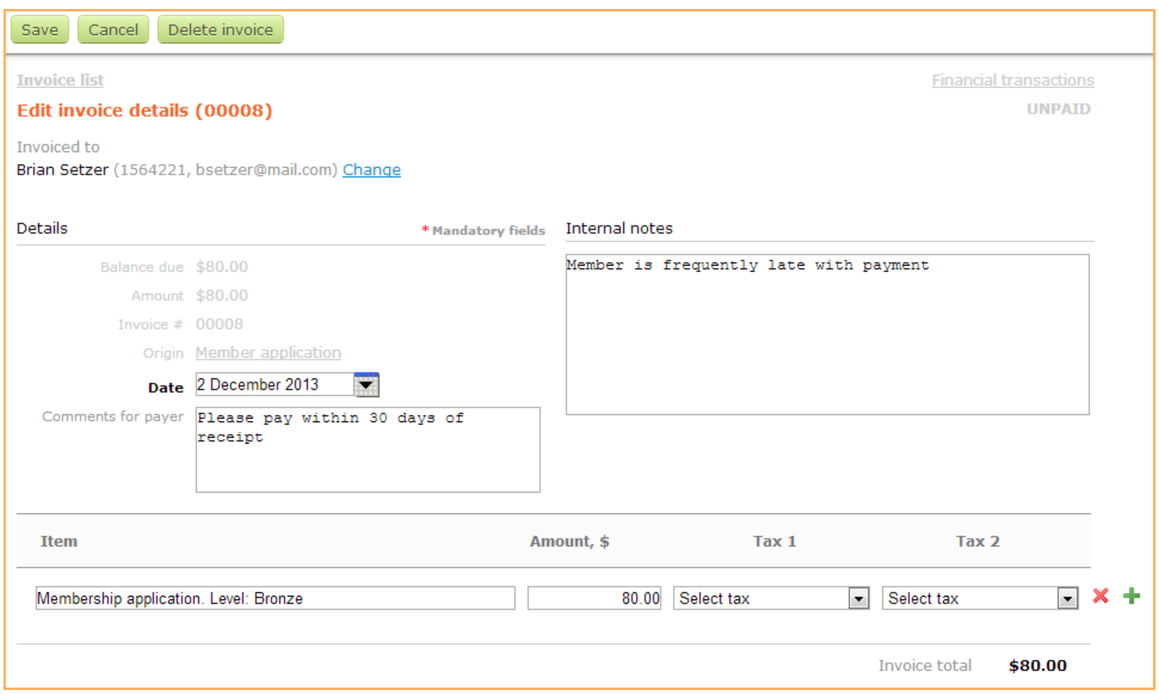
To edit the invoice directly, follow these steps:

1. Find and open the invoice.

2. Click the **Edit** button.



3. On the **Edit invoice** screen, you can change the person assigned the invoice (for unpaid invoices only), or update the items and amounts listed on the invoice. You can also add additional options by clicking on the green plus sign next to the last item and entering the new item name and cost into the box that appears. The cost can be a negative number if you want to include a discount. To remove an item, click on the red **X**. The total about due will be automatically recalculated and displayed below.



4. Click on **Save** to save the changes and update the contact's balance. You can then print or email the updated invoice.

Voiding an invoice

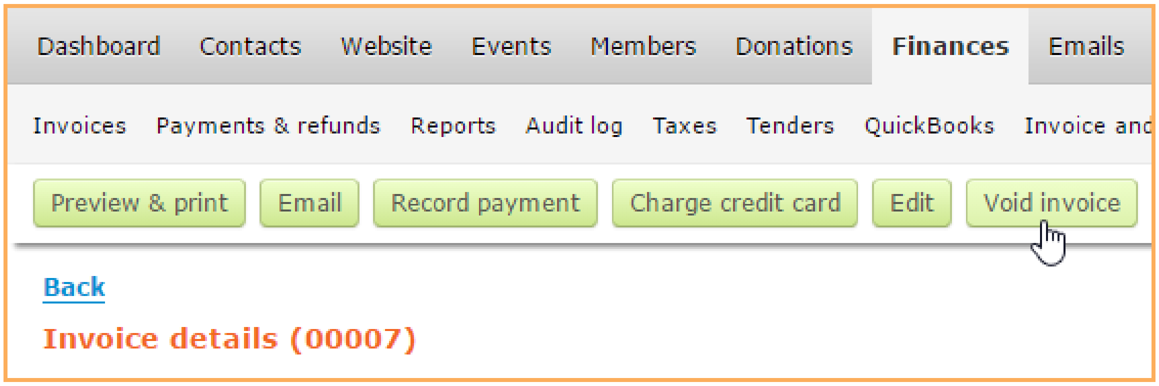
If you want to cancel an invoice, you can void it. Voiding an invoice cancels the invoice without deleting it, thereby preserving historical information for any future audits.

Read more/less

When you void an invoice, any settled payments will be removed, and corresponding payment will be unsettled. Any event registration or membership application associated with the invoice will not be deleted, but will now appear as unpaid. Notes will be added in both cases indicating that the invoice was voided.

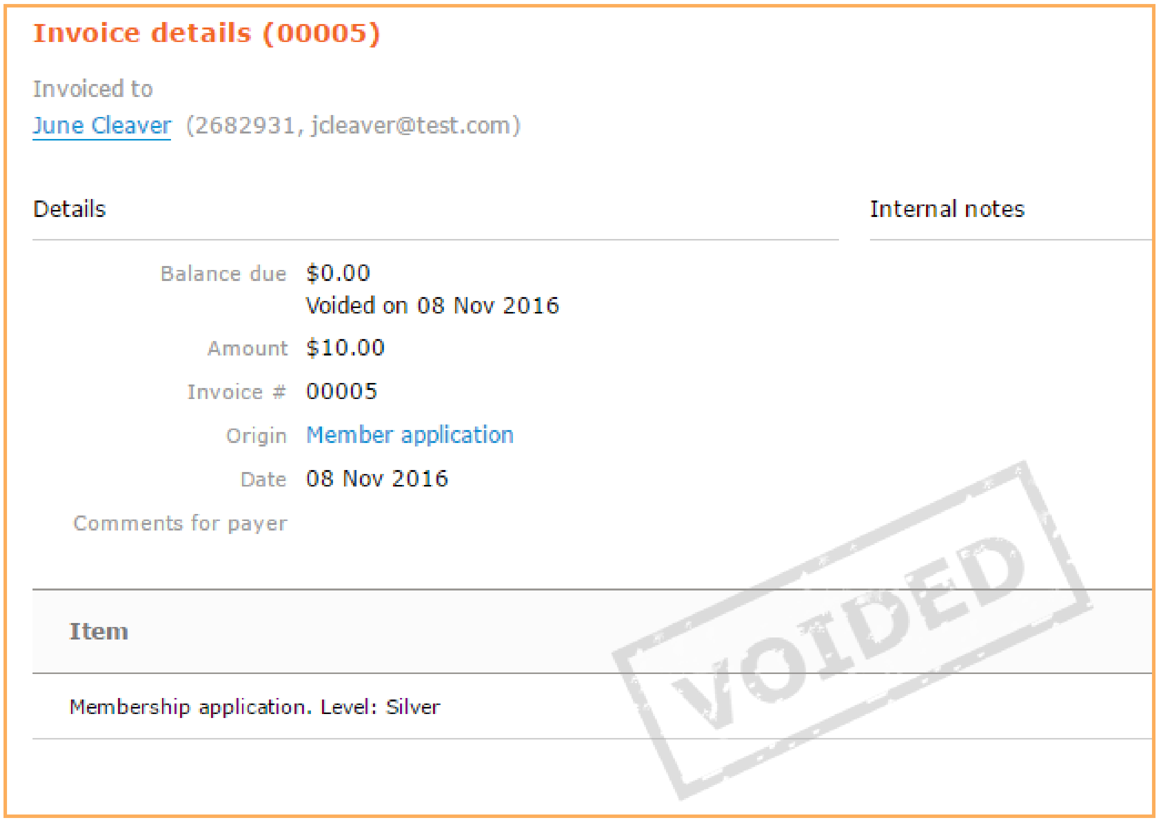
When you cancel an event registration, the corresponding invoice will be automatically voided.

To manually void an invoice, you display the invoice details then click the **Void invoice** button.

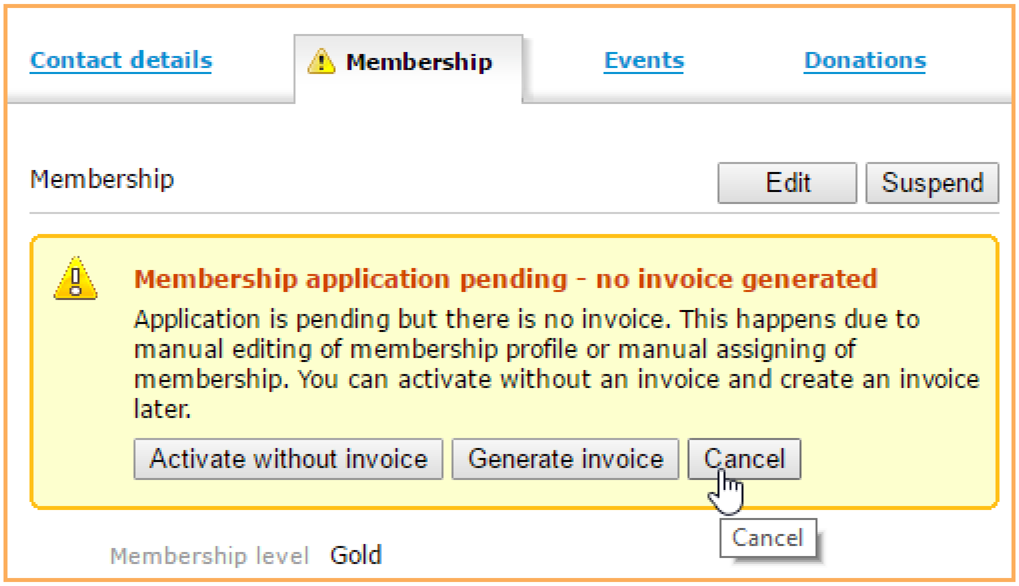


You will be prompted to confirm the operation, which cannot be undone.

When you void an invoice, the invoice amount will not be changed but the invoice balance will be set to zero. The voided invoice will have a status of voided and will appear marked with a VOIDED stamp.



When you void the invoice for a membership application, renewal or level change, an option will appear on that contact's **Membership** ta b to cancel their application, renewal, or level change.



Voided invoices are not included in financial reports. A record of how and when an invoice was voided will appear in the audit log.

Deleting an invoice

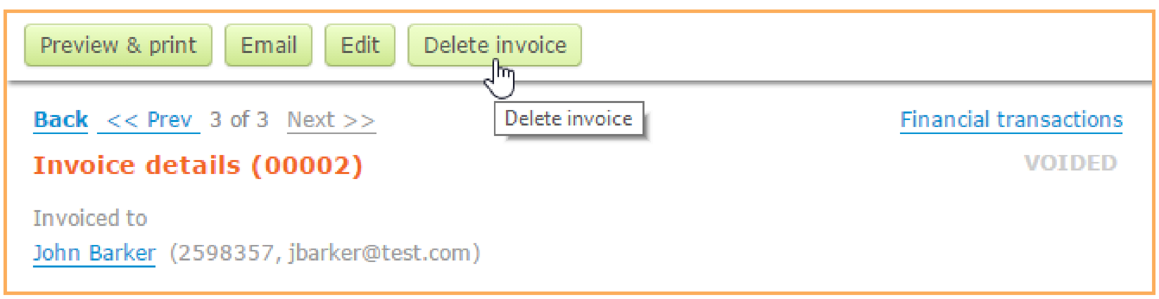
If you want to cancel an invoice without preserving any historical record of the invoice, you can delete it after you've voided it.

Read more/less

Wild Apricot will automatically delete invoices in the following cases:

- If you delete an event or an event registration, the corresponding invoice(s) will be automatically deleted.
- if you delete a contact, all invoices assigned to the contact will be automatically deleted.

To manually delete a voided invoice, display the invoice details and click the **Delete invoice** button.



You will be asked to confirm the operation, which cannot be undone.

> Deleted invoices **cannot be restored**.

Once you confirm the deletion, a record of the deletion will be added to the Audit log showing the contact affected, the date, the invoice number, the amount of the invoice, and the name of the administrator who deleted it.

Deleting the invoice will remove the invoice amount from your invoice report. If you delete an automatically generated invoice, it will result in a transaction with no corresponding invoice.

On this page:

Expand all sections

See also:

- Invoices
- Record payment and settle to invoice
- Issuing manual invoices

Customizing invoices and receipts

Customizing invoices and receipts

Separate templates are used as the basis for invoices, payment receipts, and donation receipts. You can customize the content and appearance of invoices and receipts on an individual basis before emailing them, or modify their templates to customize all subsequent invoices or receipts.

The options to customize invoices and receipts are found on the **Settings** screen under **Finances**. You can also access these options from the **Finances** drop-down menu.

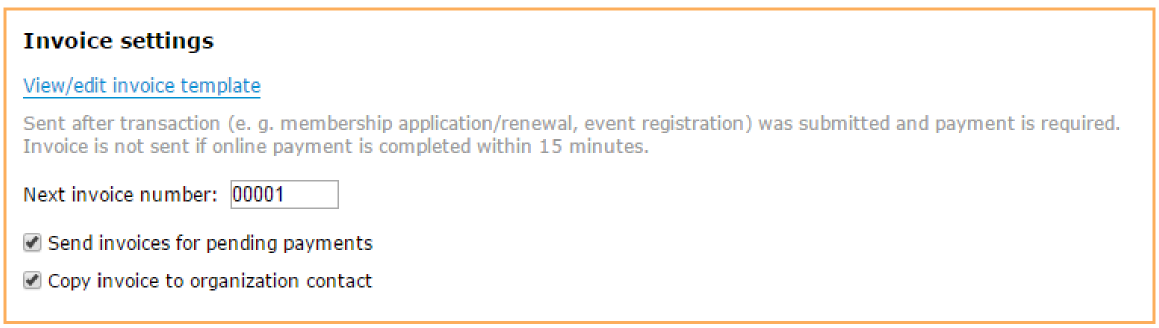
Invoice settings

To display your invoice settings, hover over the **Finances** menu then click **Invoice and receipt settings** .

Read more/less

Within the invoice settings, you can:

- control who receives copies of the invoice for pending transactions
- set the next invoice number, and
- customize the invoice email template.



The invoice number is automatically incremented each time a new invoice is created. You can set the next invoice number to be used, but if you enter a number that is already in use, multiple invoices may end up with the same number. The invoice number can up to 7 digits in length.

If you want payers to be emailed unpaid invoices, check the **Send invoices for pending payments** option. Invoices are only emailed if online payment is **not** completed within 15 minutes of confirming a transaction. If you want the email to be copied to everyone specified under your email routing settings, then check the **Copy invoice to organization contact** option.

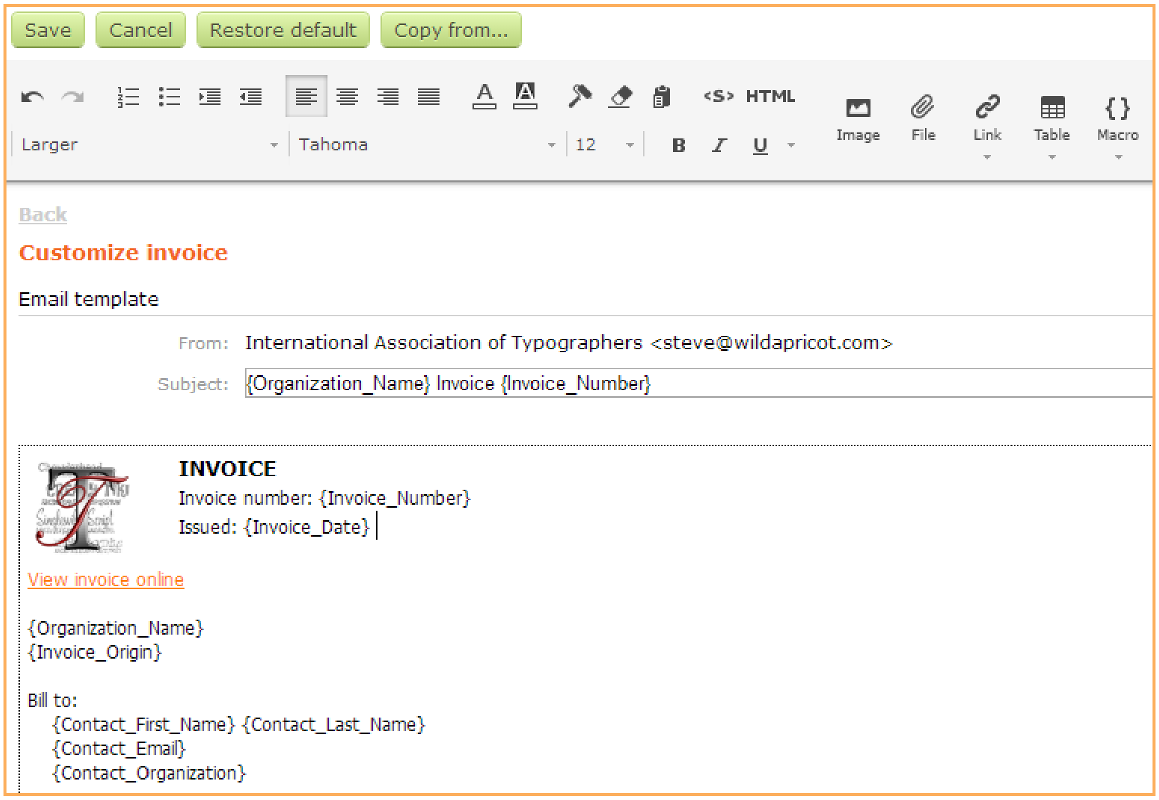
Customizing the invoice template

To modify the template used as the basis for invoices, click the **View/edit invoice template** link within your invoice settings.

Read more/less

You can then click the **Send test email** button to receive a sample invoice email or click the **Edit** button to begin customizing the template.

When you click the **Edit** button, the content editor toolbar appears at the top of the screen. Using the content editor, you can customize the template by adding or removing text, graphics, and macros.



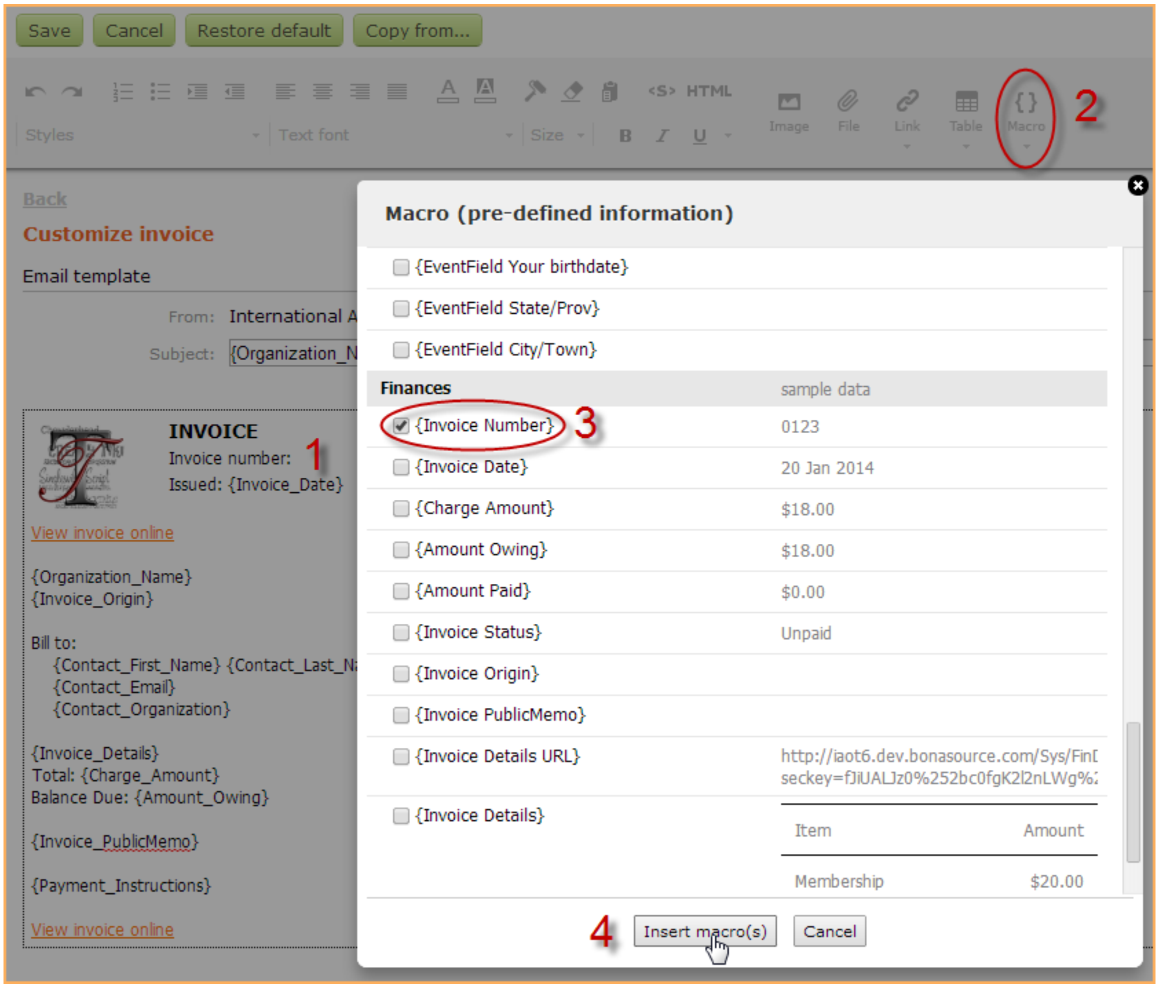
Since the same invoice template is used for all transactions – including membership and event transactions – you should not include information specific to any particular kind of transaction. For example, you should avoid including event details or information about individual membership levels.

Invoice macros

You can insert macros to include variable information such as contact name that vary from one invoice to the next, and to include constant information such as payment instructions that you don't want to have to update in multiple locations.

Read more/less

To insert a macro, click within the template where you want the information to appear, then click the **Macro** icon within the toolbar. From the list that appears, select the macro you want to use then click the **Insert macro** button.



Macros are specific to each template, so there are some macros that work for event emails but not for invoices. When you click **Macro** icon, only the macros specific to this template will be available. If you manually enter another macro that is not supported for this template, it will be ignored.

Macros available for the invoice template include:

Macro	Description
{Invoice_Number}	The number of the current invoice **Example:** 0123
{Invoice_Date}	The date the invoice was created **Example:** 20 September 2010
{Charge Amount}	The total amount of the invoice **Example:** $18.00
{Amount_Owing}	The total amount owed **Example:** $8.00
{Amount_Paid}	The total amount of the invoice that has already been paid **Example:** $10.00
{Invoice_PublicMemo}	Memo to payer, entered on the invoice by the administrator **Example:** For room booking from 23 Dec - 26 Dec 2011

{Invoice_Details}	Displays the invoice items. **Example:** Item Amount Membership application $20.00 Discount -$2.00
{Invoice_Status}	Status of the invoice, either **Paid** or **Unpaid**
{Invoice_Origin}	The origin of the invoice - (Name of event, membership level, ...) **Example:** Membership application: "Basic member"
{Payment_Instructions}	**Example:** If paying by check send to: 123 King St. West.
{Invoice_Details_URL}	Link to invoice details in public profile which allows user to view and pay the invoice online (does not require logging in)

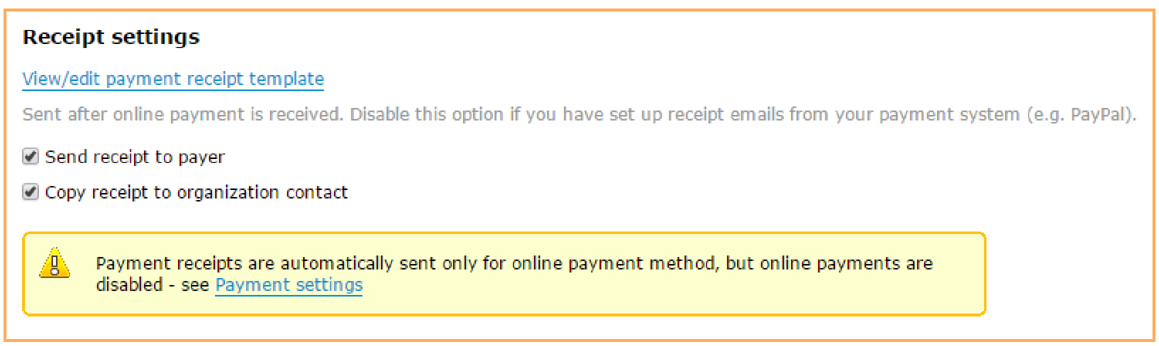
Payment receipt settings

To display your payment receipt settings, hover over the **Finances** menu and click **Invoice and receipt settings**.

Read more/less

Within the receipt settings, you can:

- control who is automatically emailed a payment receipt after an online payment has been received, and
- customize the payment receipt template.



If you want the payer to be automatically emailed a payment receipt, check the **Send receipt to payer** option. If you want to email a copy of the receipt to everyone specified under your email routing settings, then check the **Copy receipt to organization contact** option.

Payment receipts are not automatically emailed when a manually payment is recorded. Administrator can, however, manually email the receipt.

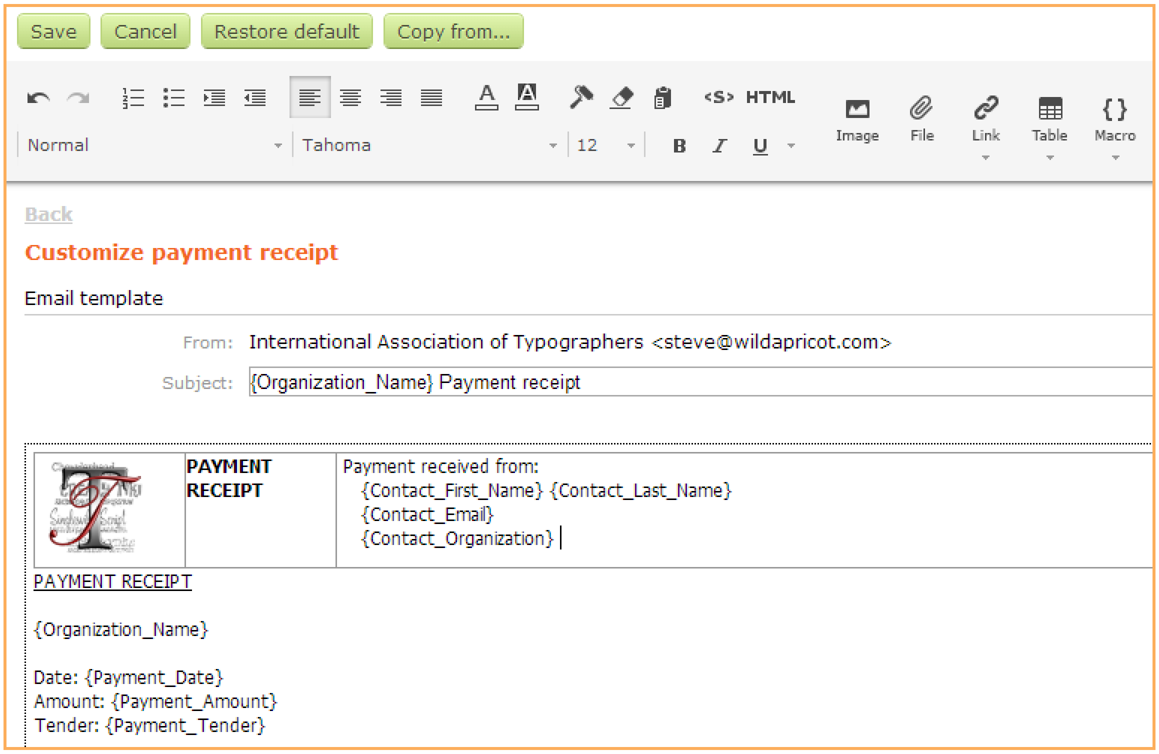
Customizing the payment receipt template

To modify the template used as the basis for payment receipts, click the **View/edit receipt template** link within your payment receipt settings.

Read more/less

You can then click the **Send test email** button to receive a sample receipt email or click the **Edit** button to begin customizing the template.

When you click the **Edit** button, the content editor toolbar appears at the top of the screen. Using the content editor, you can customize the template by adding or removing text, graphics, and macros.



Since the same receipt template is used for all transactions – other than donations – you should not include information specific to any particular kind of transaction. For example, you should avoid including event details or information about individual membership levels.

Payment receipt macros

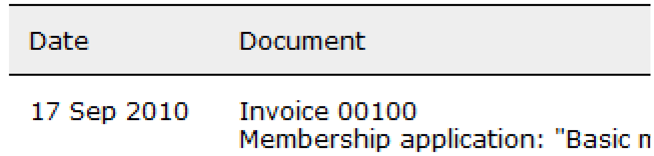
You can insert macros to include variable information such as contact name.

Read more/less

To insert a macro, click within the template where you want the information to appear, then click the **Macro** icon within the toolbar. From the list that appears, select the macro you want to use then click the **Insert macro** button.

Macros available for the payment receipt template include:

Macro	Description
{Payment_PublicMemo}	Memo to payer, entered on receipt by the admin **Example:** Check #1234 received on 16 Dec 2011
{Payment_Date}	The date the payment was recorded **Example:** 20 September 2010
{Payment_Amount}	The amount of the payment **Example:** $20.00
{Payment_SettledAmount}	The amount of the payment used to settle outstanding invoices **Example:** $20.00
{Payment_Tender}	The tender used for the payment (see: Payment tenders) **Example:** Online payment (Authorize.NET Credit Card)
{Payment_AvailableBalance}	The available balance for the contact **Example:** $0.00

{SettlementTable}	Details about the invoices this payment has been settled with (See Recording payments and credits, and settling invoices) **Example:**  Date / Document 17 Sep 2010 / Invoice 00100 Membership application: "Basic n

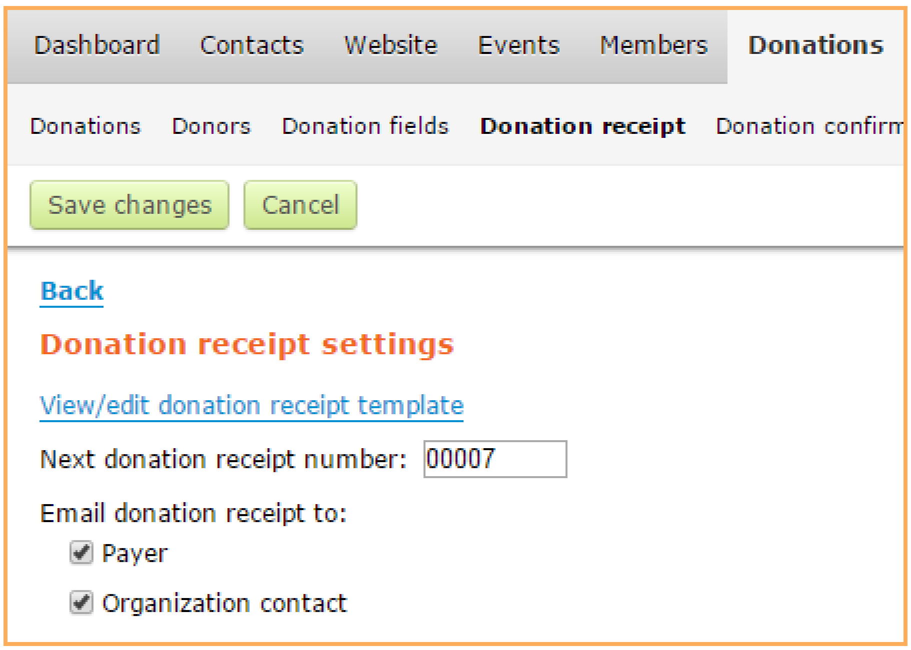
Donation receipt settings

To display your donation receipt settings, hover over the **Donations** menu then click **Donation receipt** .

Read more/less

From your donation receipt settings, you can:

- control who receives donation receipts
- set the next donation receipt number, and
- customize the donation receipt email template.



The donation receipt number is automatically incremented each time a new donation receipt is created. You can set the next receipt number to be used, but if you enter a number that is already in use, multiple donations may end up with the same receipt number. The receipt number can up to 7 digits in length.

If you want the donor to be automatically emailed a donation receipt, check the **Payer** box. If you want to email a copy of the receipt to everyone specified under your email routing settings, then check the **Organization contact** box.

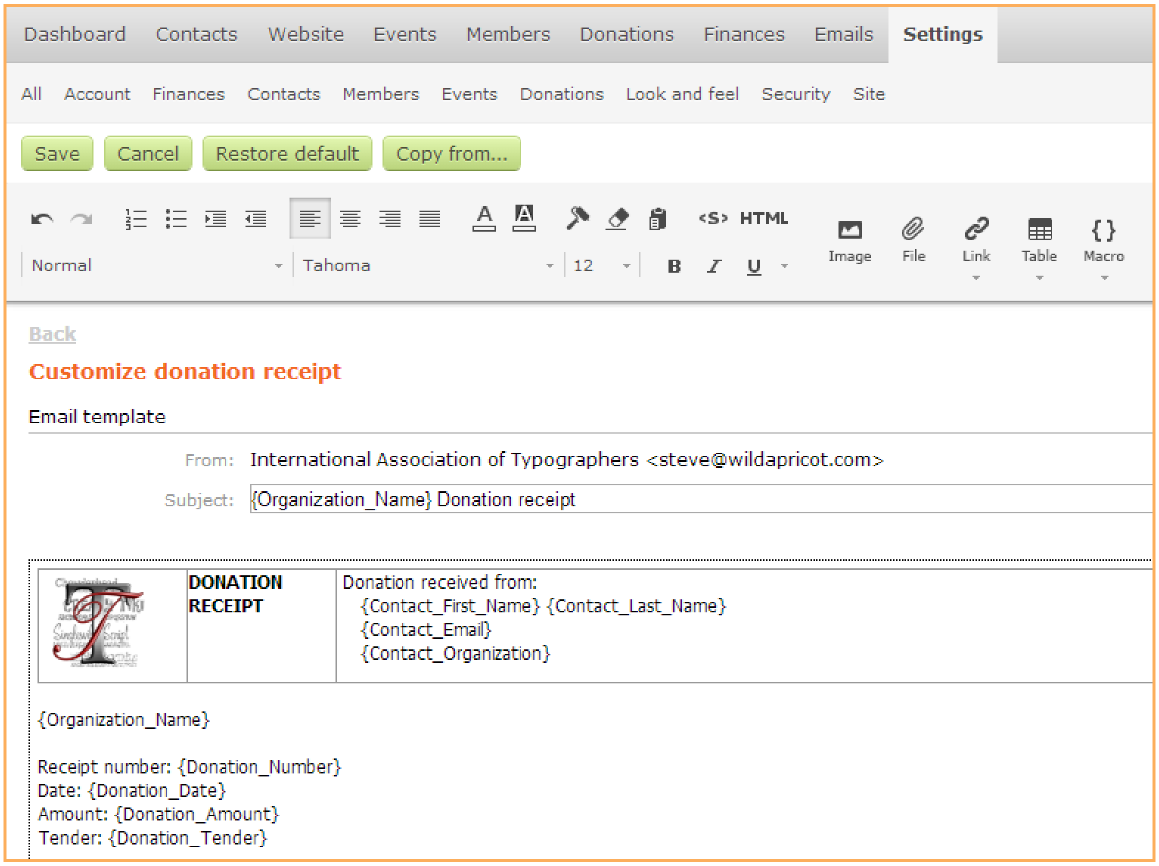
Customizing the donation receipt template

To modify the template used as the basis for donation receipts, click the **View/edit donation receipt template** link within your donation receipt settings.

Read more/less

You can then click the **Send test email** button to receive a sample receipt email or click the **Edit** button to begin customizing the template.

When you click the **Edit** button, the content editor toolbar appears at the top of the screen. Using the content editor, you can customize the template by adding or removing text, graphics, and macros.



Donation receipt macros

You can insert macros to include variable information such as contact name.

Read more/less

To insert a macro, click within the template where you want the information to appear, then click the **Macro** icon within the toolbar. From the list that appears, select the macro you want to use then click the **Insert macro** button.

Macros available for the donation receipt template include:

Macro	Description
{Donation_PublicMemo}	Memo to donor, entered on donation receipt by the admin **Example:** Thanks Jake, much appreciated
{Donation_Number}	The receipt number for the donation **Example:** 00007
{Donation_Date}	The date the donation was made **Example:** 21 September 2010
{Donation_Amount}	The amount of the donation made **Example:** $25.00
{Donation_Tender}	The tender used for the payment (see: Payment tenders) **Example:** Online payment (Authorize.NET Credit Card)
{DonationField_All}	All the fields that were shown on the donation form **Example:** City: NY Postal code: N1170 Country: USA

On this page:

Expand all sections

Emailing or printing invoices and receipts

Emailing or printing invoices and receipts

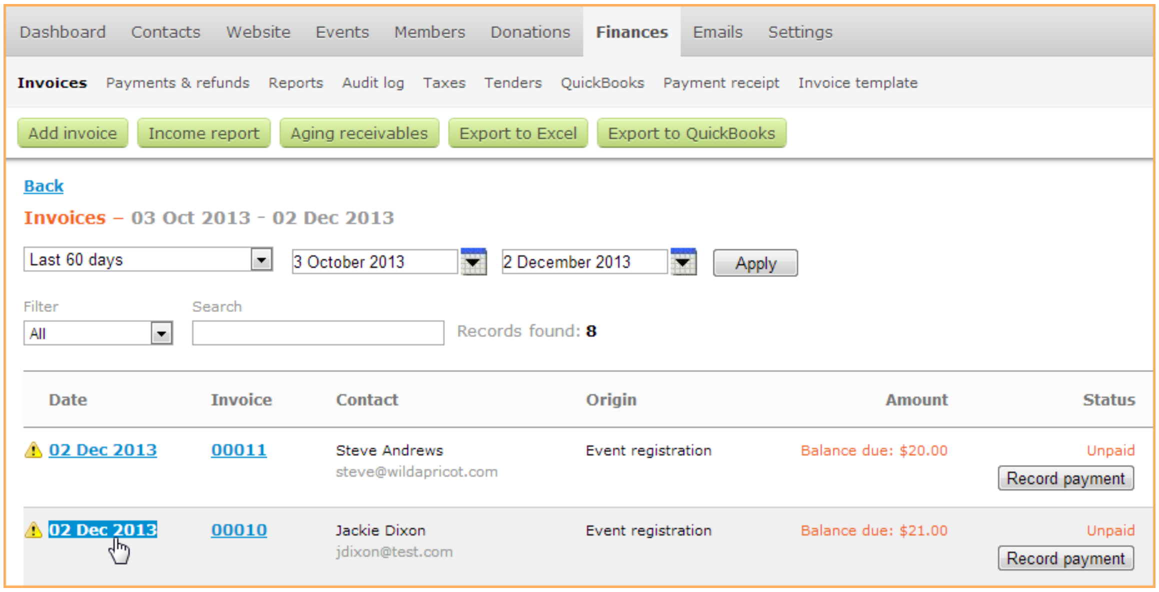
Payment receipts are sent automatically for online payments only. For manually recorded payments, you must manually email the receipt to the contact. Administrators can view, print, or resend any previously created invoice, donation receipt, or payment receipt (e.g. if the buyer requires another copy).

Members and contacts can also access their financial records, including invoices and payment receipts, directly from the Invoices and payments tab of their profile page.

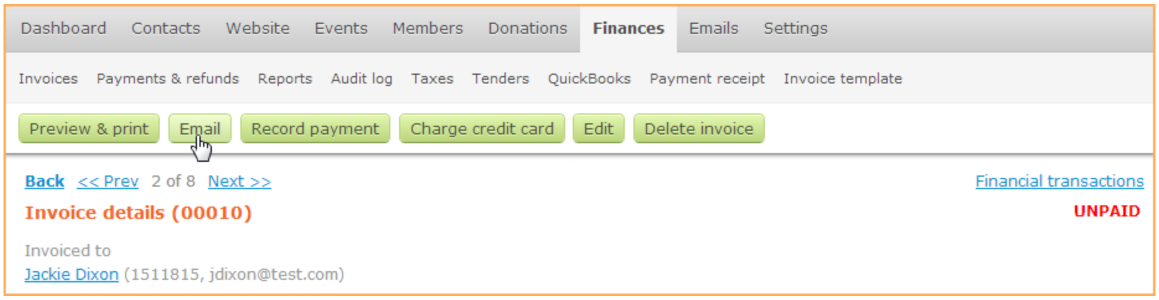
Emailing an invoice

To email an invoice, first search for and open the invoice .

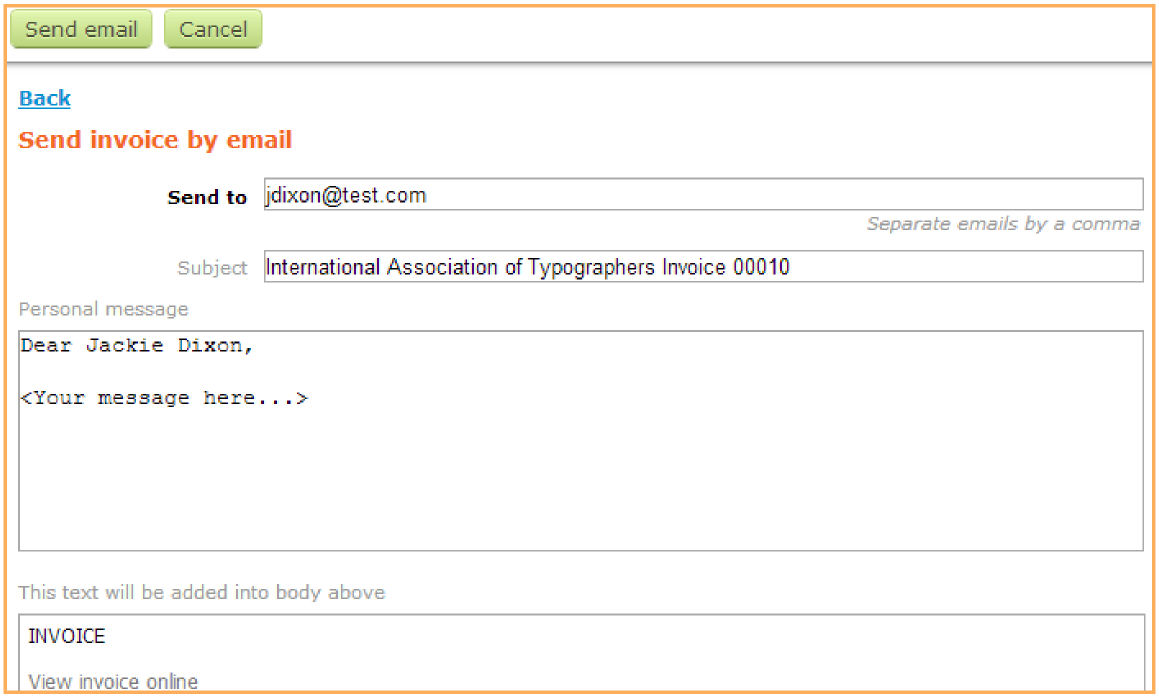
Read more/less



From the invoice details, click the **Email** button at the top of the page.



On the screen that appears, you review and finalize the email.



The **Send to** box contains the email address of the contact by default. If needed, you can enter a different email address or additional email addresses separated by a comma.

The **Subject** box displays the subject line for the email – it defaults to your organization name followed by the invoice number. You can change the subject if needed.

Under **Personal message**, enter an option greeting to display above the invoice. Below this box you will see a preview of the invoice being sent using your invoice template.

To send the invoice, click the **Send email** button.

Note that the default invoice template contains a direct link to the invoice that if clicked on will open the invoice. Once the invoice is opened, it can be paid online. You can customize the invoice template and remove the link if desired.

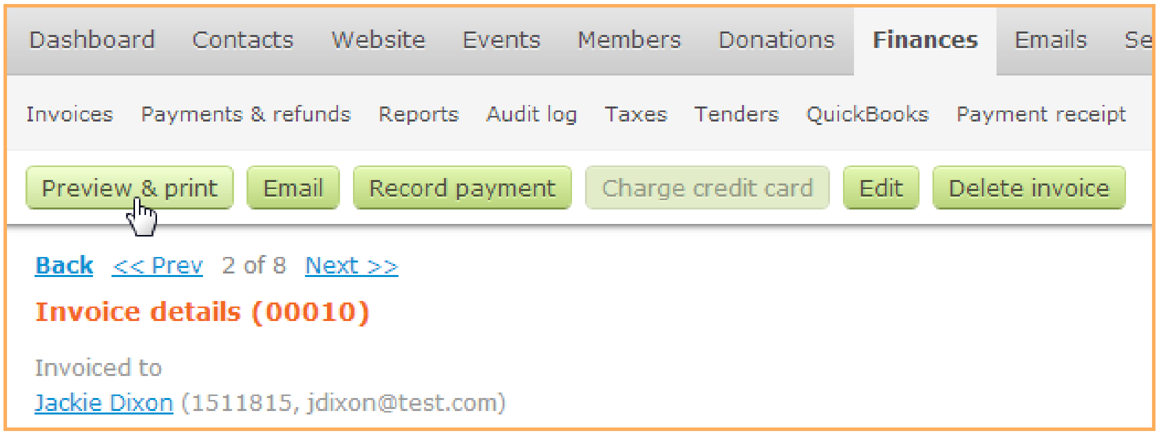
> ⚠ Do not re-send a previously sent invoice from the email log – the macros will not work. Always open the actual invoice and email it from there.

Printing an invoice

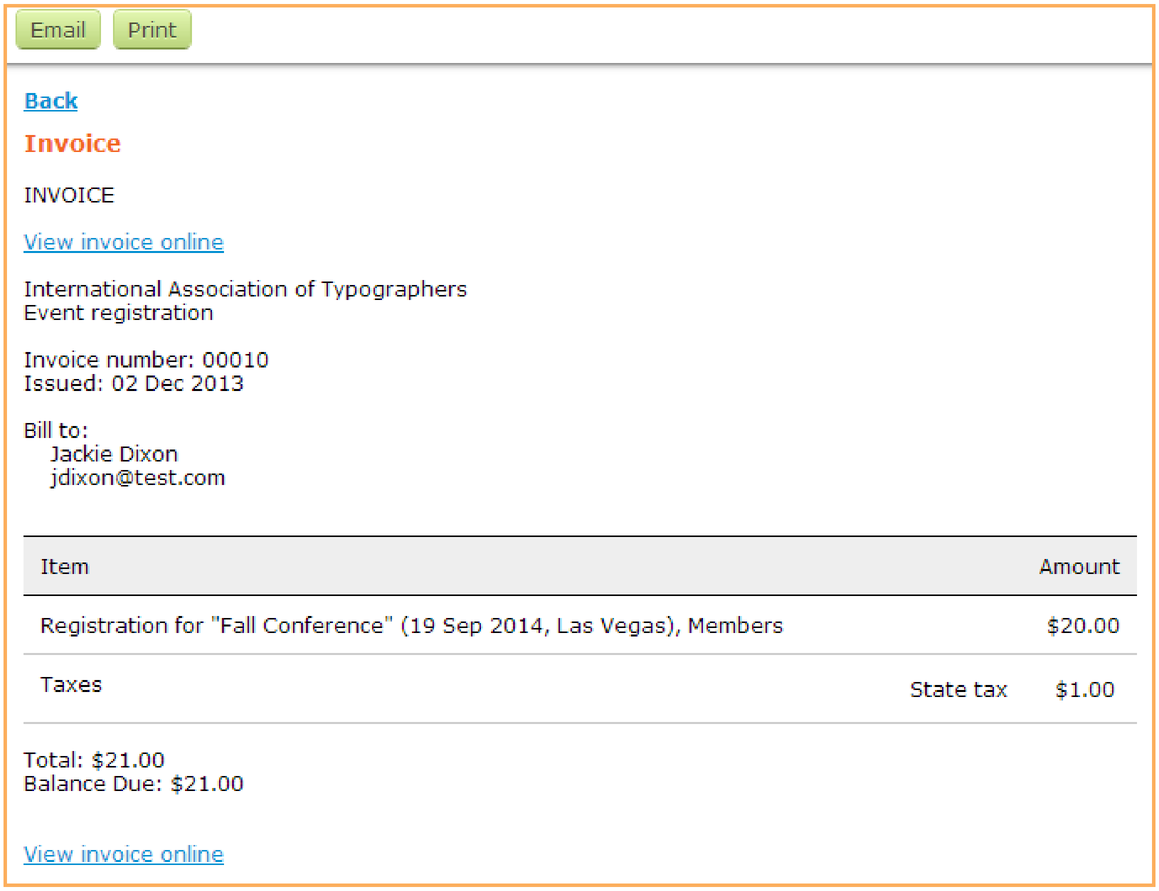
To email or print an invoice, search for and open the invoice .

Read more/less

From the invoice details, click **Preview & Print**.



You will then see a preview of what you are about to print, laid out according to your template.



Click **Print** to print the invoice or receipt, or **Email** to email it instead.

If your logo isn't printing on your invoices, follow these steps:

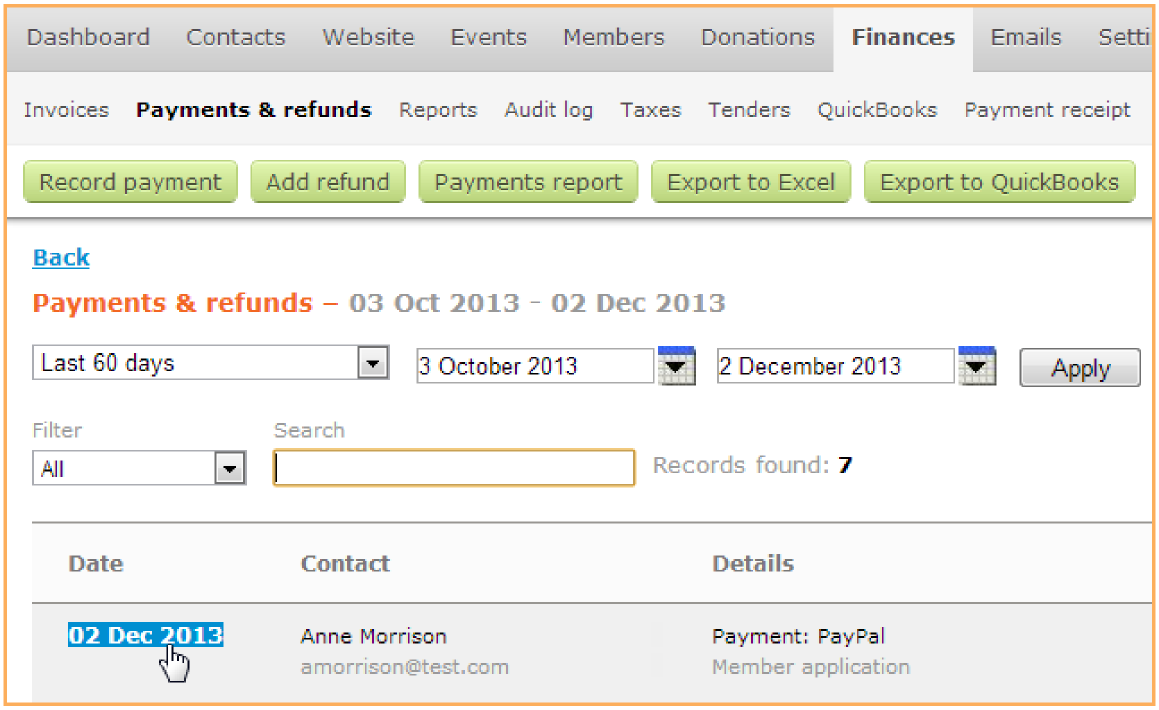
1. Go to **Settings** -> **Traffic encryption (HTTPS / SSL)**
2. Select a different encryption option then select your original option.
3. Click **Save**.

Your logo should now appear when you print your invoice.

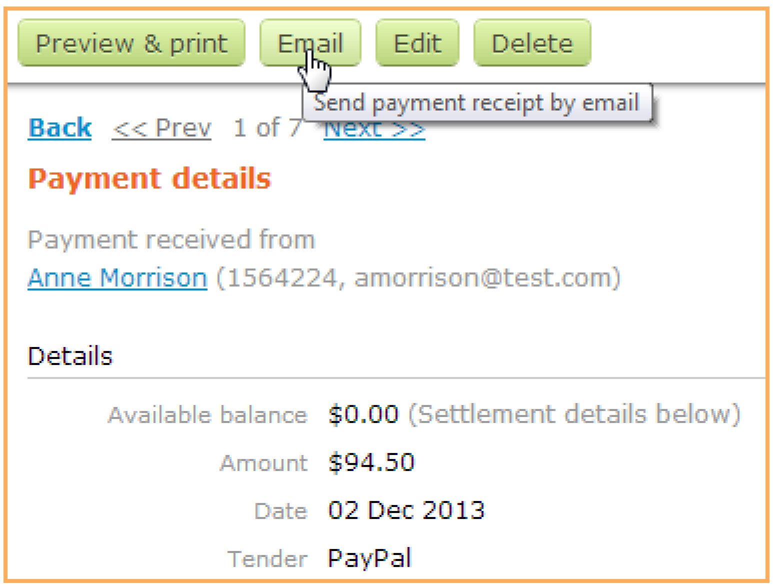
Emailing payment receipts

To email a payment receipt, find and open the payment .

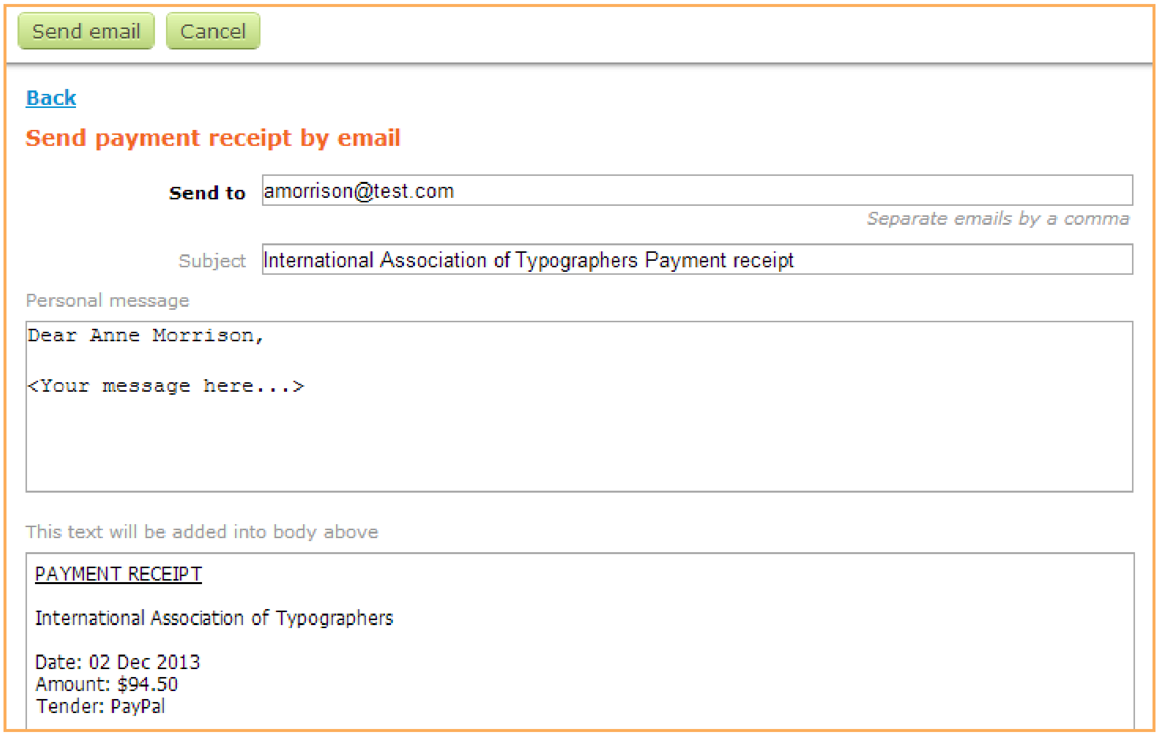
Read more/less



Then, click on the **Email** button.



On the screen that appears, you can review and finalize the email.



The receipt layout is defined by a template that you can customize.

When you are finishing reviewing the email, click the **Send email** button.

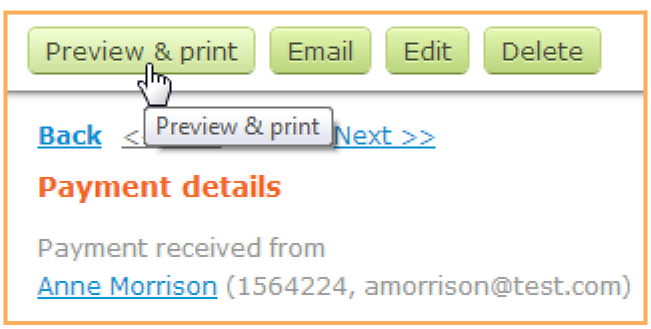
⚠ Do not re-send a previously sent receipt from the email log – the macros will not work. Always open the actual receipt and email it from there.

Printing payment receipts

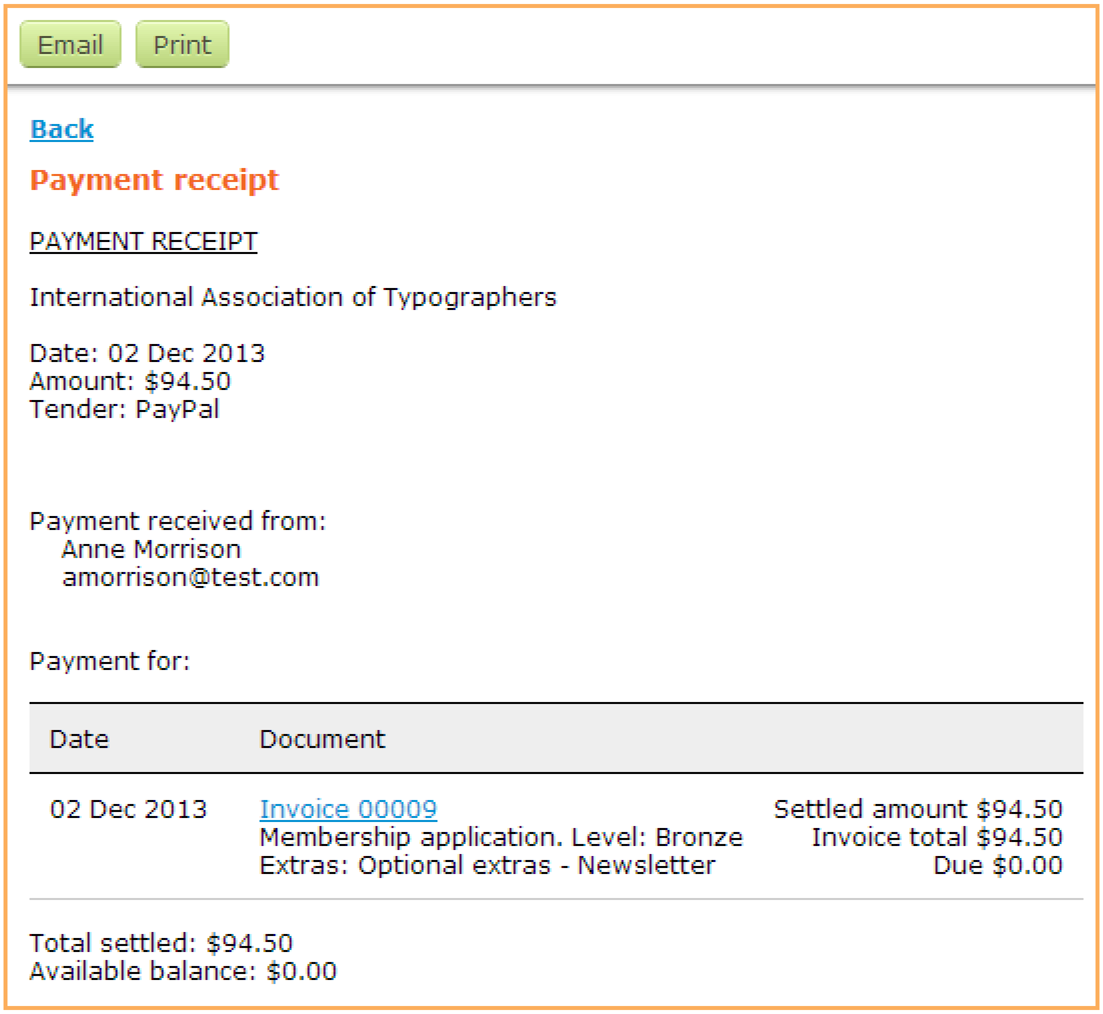
To print a payment receipt, find and open the payment.

Read more/less

From the payment details, click **Preview & Print** .



You will then see a preview of what you are about to print, laid out according to your template.



Email Print

Back

Payment receipt

PAYMENT RECEIPT

International Association of Typographers

Date: 02 Dec 2013
Amount: $94.50
Tender: PayPal

Payment received from:
Anne Morrison
amorrison@test.com

Payment for:

Date	Document	
02 Dec 2013	Invoice 00009 Membership application. Level: Bronze Extras: Optional extras - Newsletter	Settled amount $94.50 Invoice total $94.50 Due $0.00

Total settled: $94.50
Available balance: $0.00

Click **Print** to print the receipt, or **Email** to email it instead.

On this page:

Expand all sections

See also:

- Invoices
- Payments
- Finding an invoice
- Customizing invoices and receipts

Payments - Overview

Payments - Overview

You can set up your Wild Apricot account to accept online payments for various transactions on your website – membership dues, event registration, donation, and other invoice payments. For membership dues, you can set up recurring payments – automatically charge credit cards on a regular basis – depending on your payment system. You can also manually record offline payments – payments received outside of Wild Apricot (e.g. check, cash, wire transfer, or credit card payments charged outside of Wild Apricot). Every payment recorded in Wild Apricot automatically generates a receipt.

You can look up recorded payment details, run payment reports, and process refunds. A refund can be processed manually by an administrator or automatically when Wild Apricot receives a refund notification from your online payment processor.

Contacts can also view a full history of their payments and invoices (see View account history and pay invoices).

Payments can be classified by *tender* – the method by which payment was received. For online payments, tender is recorded automatically (e.g. *Online - Authorize.Net credit card payment*). For manual payments, you can select the tender when the payment is recorded (e.g. *Cash* or *Checking account*). You can customize the list of tenders as needed. For more information, see Payment tenders.

Online payments are automatically matched to appropriate invoices. For information on manually matching payments to outstanding invoices, see Record payments and settle to invoice.

Payments not yet fully allocated to invoices or not refunded are considered to have an *available balance*.

Payment settings

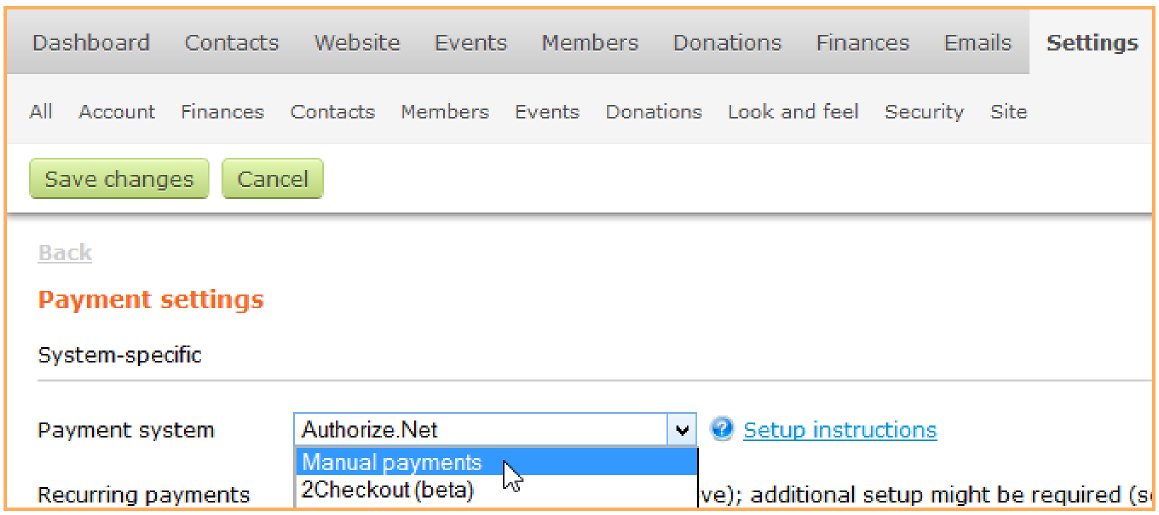
On the **Payment settings** screen, you indicate how your organization accepts payments. You can choose to accept online payments as well as manual payments, or just handle all payments manually.

To display the **Payment settings** screen, click **Finances** under the **Settings** menu, then click **Payment settings**.

Manual payments

Read more/less

If you don't want to accept online payments, you can click the **Payment system** drop-down and select the **Manual payments** option.

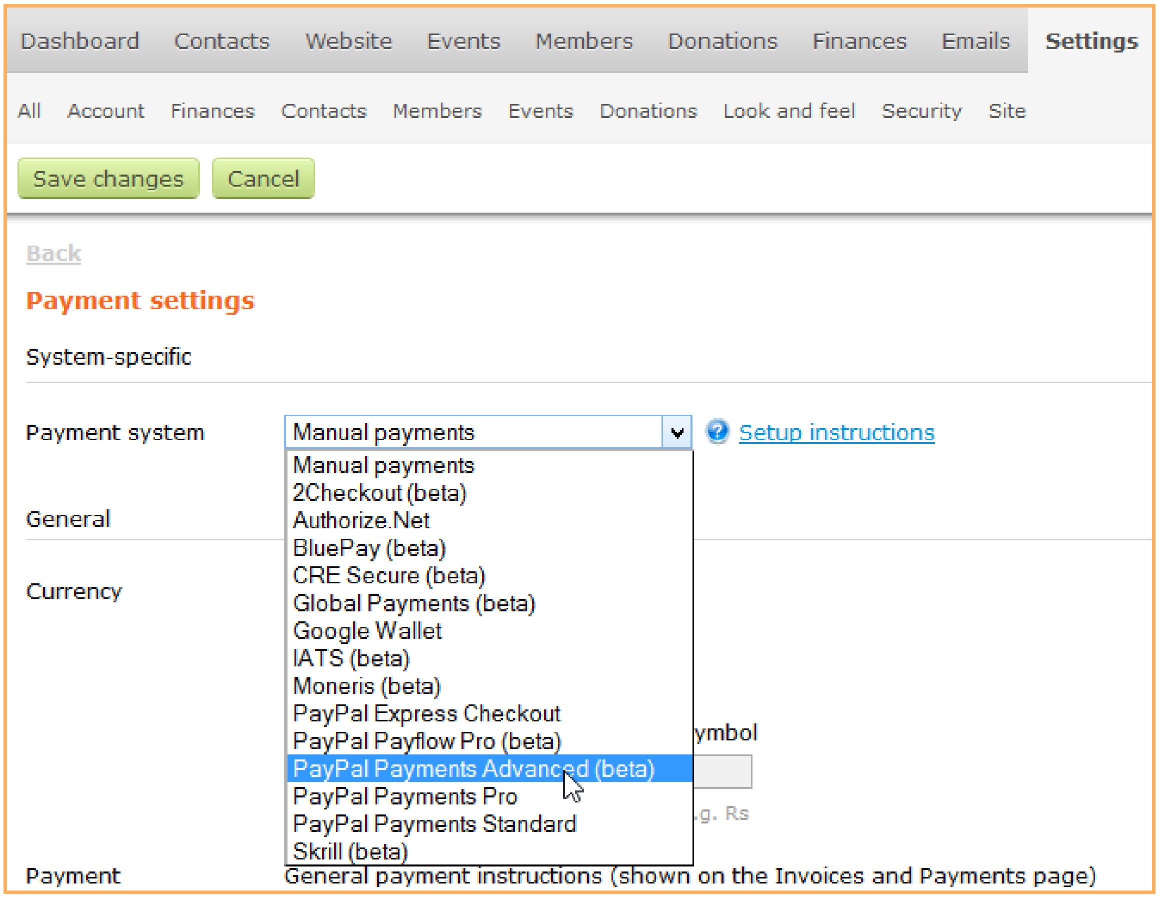


With manual payments selected, you can only manually record offline payments. You can choose the currency to be used on your site (and in your reports), and add payment instructions to be displayed to your visitors. You can choose a predefined currency or enter your own custom currency. If you enter your own custom currency, you must specify the currency name, code, and symbol.

Online payments

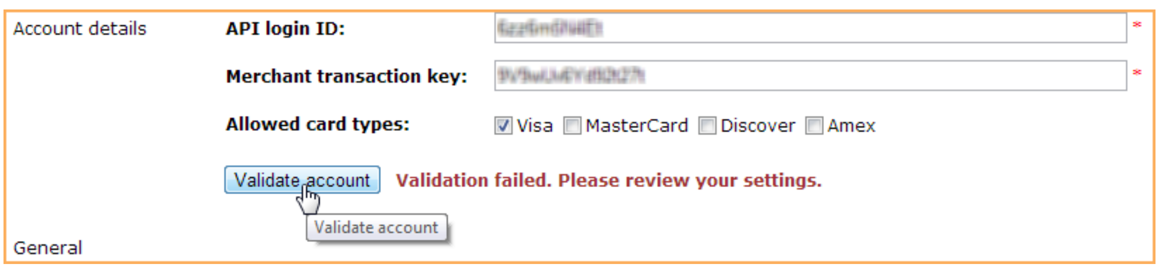
Read more/less

If you want your site to accept online payments – including online credit card payments – you must first set up an account with a supported payment provider. Then, from the **Payment settings** screen, click the **Payment system** drop-down and select your online payment system.



After you've select your online payment system, you must enter your account details. Different information is required depending on your payment system.

After entering the required account details, click **Check integration** to make sure your account details are valid.



If the account validation fails, check to make sure you entered the account details properly.

Supported online payment systems

Wild Apricot currently provides direct integration with the following payment processing systems:

- 2Checkout*
- Authorize.Net
- BluePay*
- Global Payments*
- iATS Payments*
- Moneris*
- PayPal Payflow Pro*
- PayPal Payments Advanced*
- PayPal Payments Standard
- PayPal Express Checkout
- PayPal Payments Pro
- Skrill*

- Stripe*

As well, you can use CRE Secure – which is not a payment provider but a payment service that acts as a middle man between Wild Apricot and your payment provider – to process payments through the following payment providers:

- Chase Paymentech Orbital
- First Data
- Litle
- NMI
- Orbital Enterprise
- PayLeap
- SagePay
- SkipJack
- TSYS Transit
- USA ePAY
- eProcessing Network

If you have already set up an account with one of the payment systems supported by Wild Apricot, you can click on the appropriate link above to jump to instructions on setting up that system on your site.

If you do not yet have an account with any of the supported payment systems, see Online payments for help selecting the best option for your organization.

> * Support for the payment systems marked by an asterisk is being provided without full testing in a live environment. During this initial implementation – the beta release – certain features such as recurring payments and automatic refunds will not be supported (with the exception of PayPal Payflow Pro, for which recurring payments are supported). For more information, see What does "beta" mean?.

Selecting country and currency

Read more/less

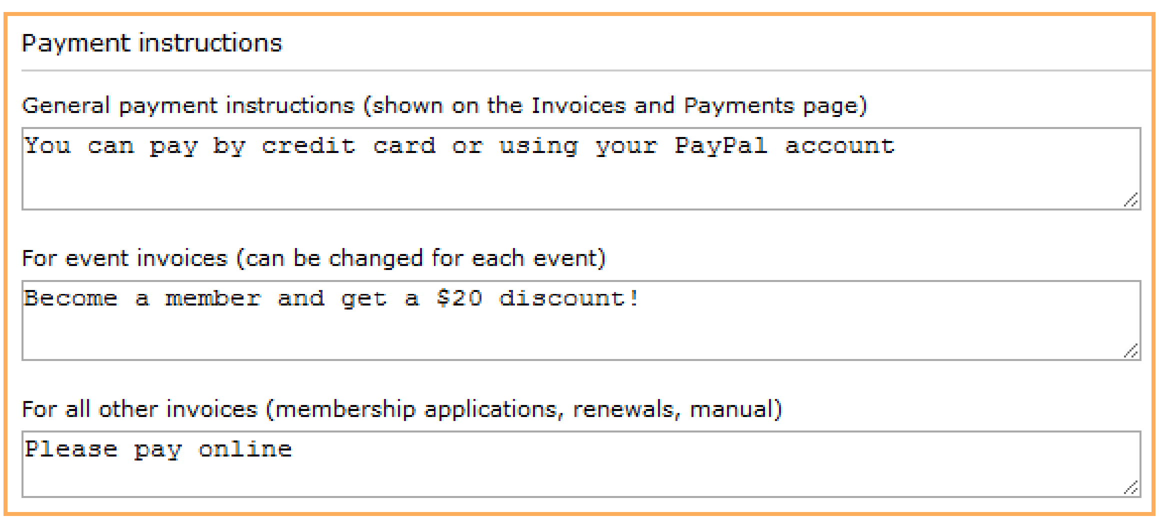
You must select the default country you want to display to customers, and the currency you want to use in your transactions (and in your reports). The currency you choose should match the currency used in your online payment system account.

> Do not change the currency after recording any payments. If you change the currency, existing payment records will not be recalculated and will no longer display correct amounts.

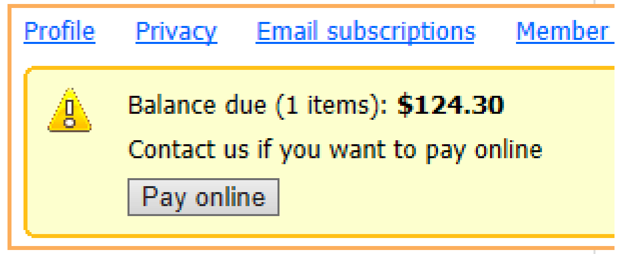
Adding payment instructions

Read more/less

Towards the bottom of the **Payment settings** screen, you can enter payment instructions to be displayed to visitors to your site explaining how to use the online or offline payment methods.

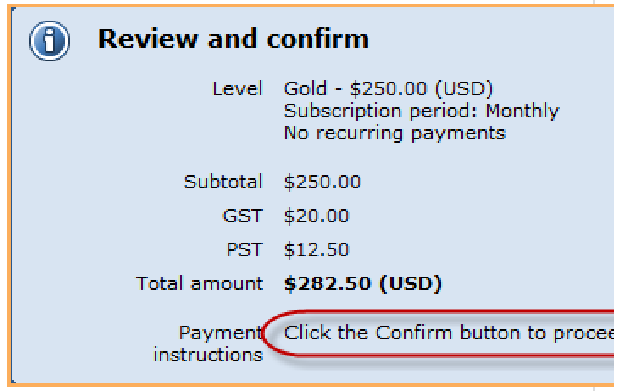


You can add different kinds of instructions to be displayed on different screens.

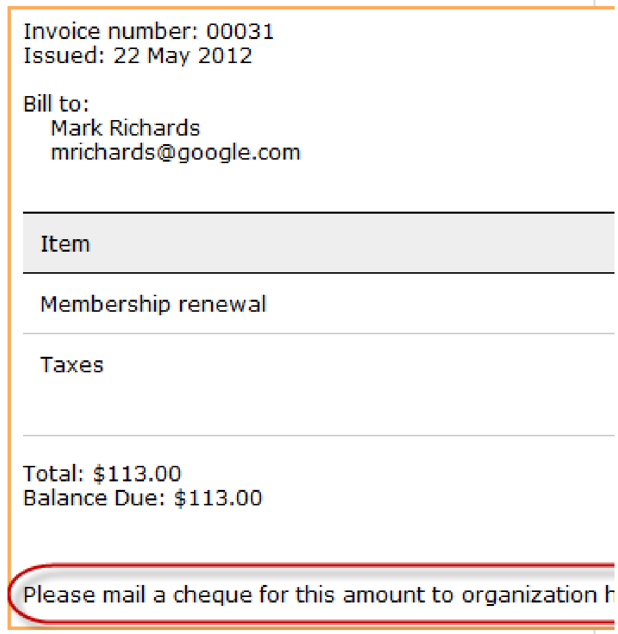
Instruction type	Where do they appear?
General payment instructions	• On **Invoices and payments** page in the member profile 
For event invoices	• On **Review and confirm** page of the event registration form  You can override these instructions for specific events on the Registration types screen.

<table>
<tr>
<td>For all other invoices</td>
<td>

- On **Review and confirm** page of the membership application or renewal



- On manual invoices

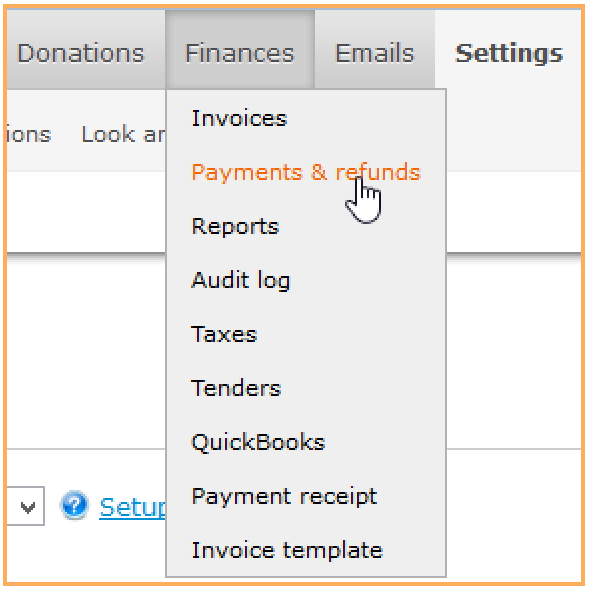


</td>
</tr>
</table>

Payments & refunds screen

Read more/less

To view a list of payments, donations, and refunds, click **Payments & refunds** under the **Finances** menu.

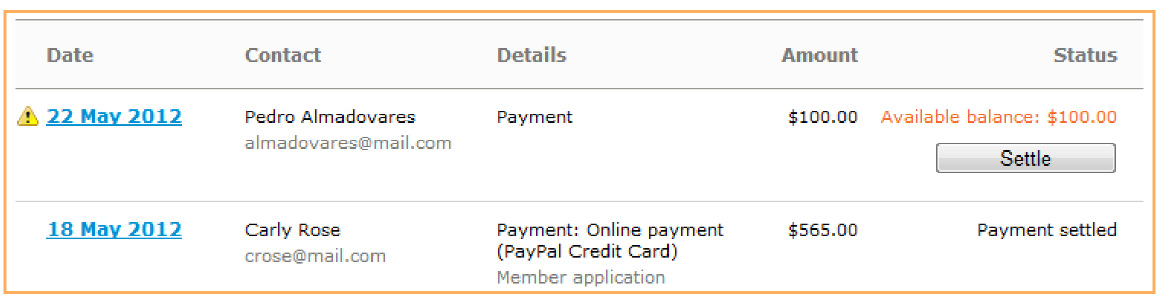


From the **Payments & refunds** screen, you can:

- view transaction details
- refund payments
- view payment reports
- export payment information

For each transaction, the following information is displayed:

- transaction date
- contact
- transaction description
- transaction amount
- transaction status (whether the payment or refund was settled)

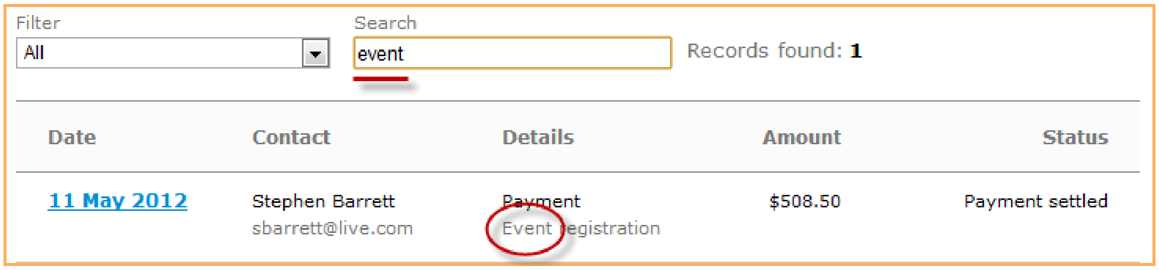


Date	Contact	Details	Amount	Status
22 May 2012	Pedro Almadovares almadovares@mail.com	Payment	$100.00	Available balance: $100.00 Settle
18 May 2012	Carly Rose crose@mail.com	Payment: Online payment (PayPal Credit Card) Member application	$565.00	Payment settled

If a payment has an available balance, you can click the **Settle** button to match the payment against an invoice. See Record payment and settle to invoice for more information.

You can filter the list to display certain types of transactions, or transactions within a certain time period. To filter the list by transaction type, click the **Filter** list and choose a transaction type. To filter by date, click the Date filter list, or enter your own date range in the calendar controls, then click **Apply**.

You can further filter the list by entering a **Search** string to be matched. Only records with the specified string will be displayed.



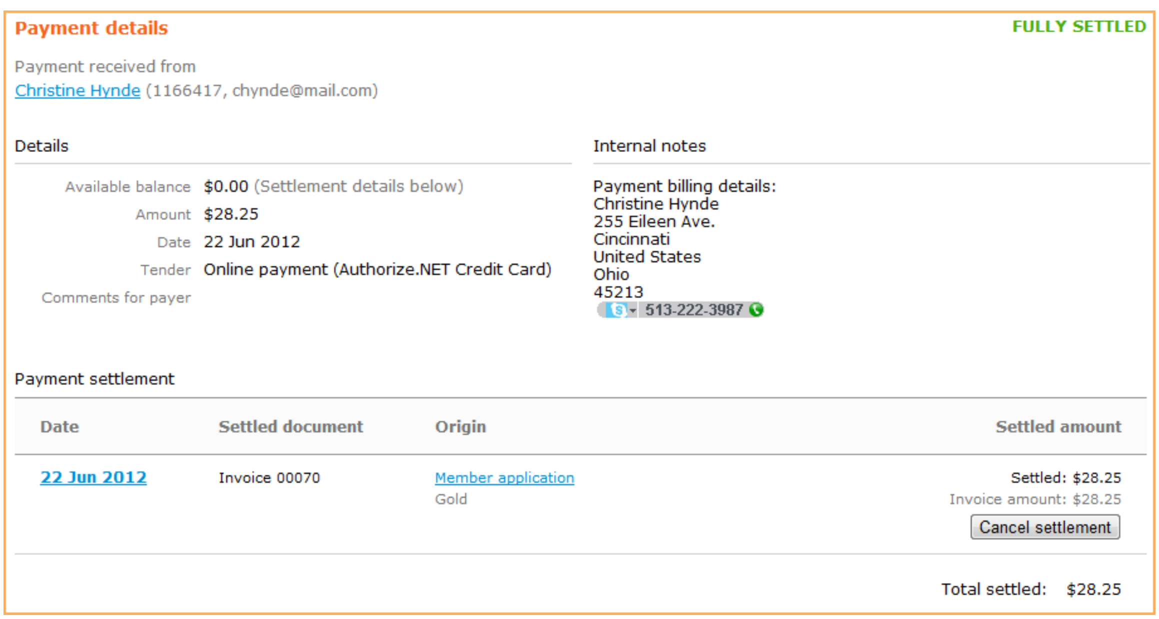
The following options are available from the **Payment & refunds** screen:

Option	Description	For more info, see...
Record payment	Manually record a payment	Record payment and settle to invoice
Add refund	Manually record a refund	Refunds
Payments report	Generate a report summarizing payments, donations, and refunds, filtered by date range, payment type, and status	Payments report
Export to Excel	Export the transaction list to Excel	
Export to QuickBooks	Export the transaction list to QuickBooks	QuickBooks

Viewing payment details

Read more/less

To view additional details for an individual payment transaction, click the transaction within the list on the **Payments & refunds** screen.



The identification information entered as part of a credit card transaction (name, address, and phone number) will appear in the **Internal notes** section.

The following options are available from the **Payment details** screen:

Option	Description	For more info, see...
Preview & print	Print or email the payment or refund details to the contact	Emailing or printing invoices and receipts

Email	Email the payment or refund details to the contact	Emailing or printing invoices and receipts
Edit	Adjust the payment amount, date received, or tender type	Adjusting or canceling a payment or refund
Delete	Delete the transaction	
Refund	Refund all or part of the available balance	Refunds
Settle	Settle all or part of the available balance to an invoice or refund associated with this contact	Record payment and settle to invoice
Cancel settlement	Cancel a settled invoice or refund	

On this page:

Expand all sections

See also:

- Customizing invoices and receipts
- View account history and pay invoices
- Financial management overview
- Invoices
- Online payments

Online payments

Online payments

Wild Apricot allows you to seamlessly integrate online payments for various transactions on your website – membership dues, event registration, donation, and other invoice payments. Depending on the payment system you use, payments can be made using a credit card, debit card, or PayPal account. You can provide for one-time payments or recurring payments. (For information on recording offline payments, see Recording payments.)

> Online payments are not available for free plans. For more information, see Functionality by billing plan.

Before you can set up your Wild Apricot site to accept online payments, you need to have an account with one of the payment systems we support, then enter the account details on the **Payment settings** screen.

Money received from online payments will be automatically deposited to your account according to your payment system's terms and conditions. Wild Apricot does not touch the payment or deduct any fees.

From the Payments and refunds screen, you can track the online payments you receive.

PCI compliance

Wild Apricot is certified Level 1 PCI DSS compliant. This means that Wild Apricot adheres to the policies and procedures set up by the major credit card companies to keep credit, debit and cash card transactions secure, and protect cardholders against misuse of their personal information.

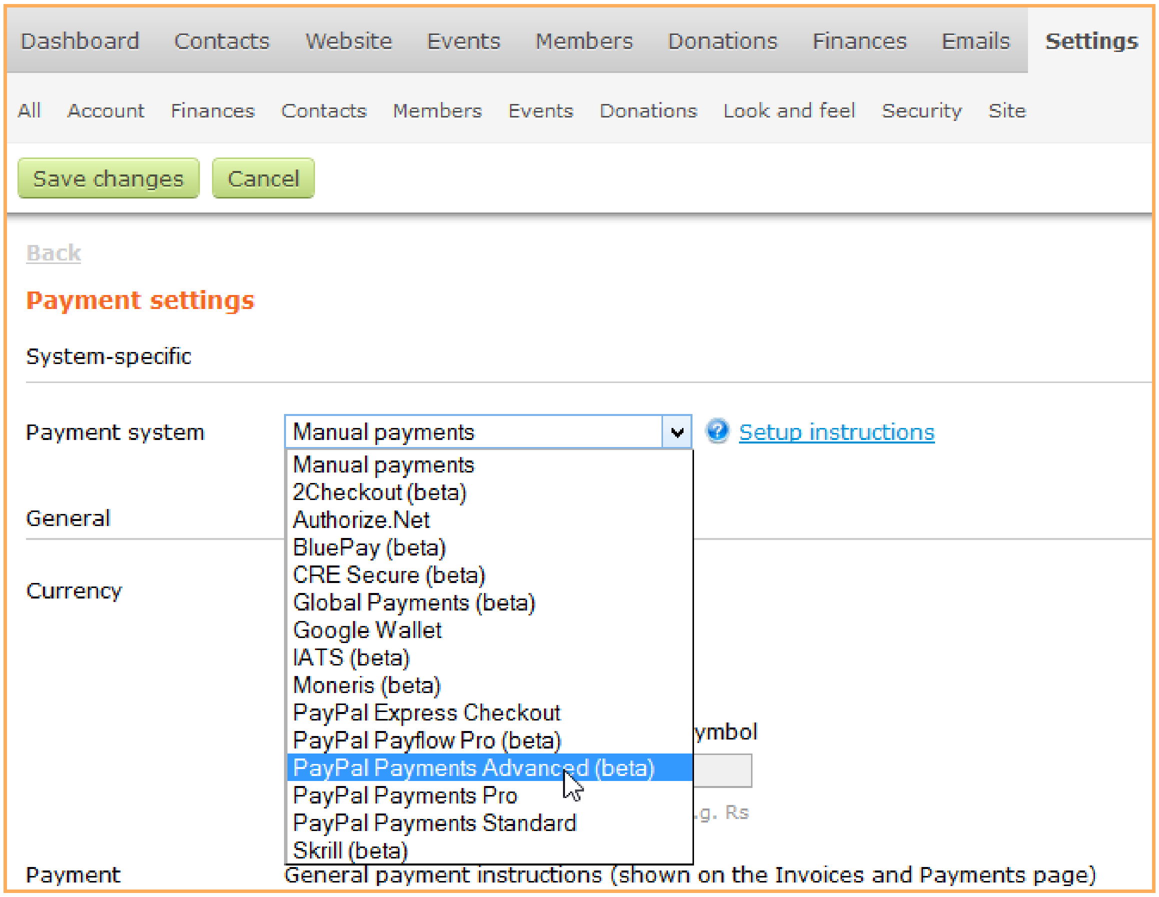
Payment settings

On the **Payment settings** screen, you indicate how your organization accepts payments.

Read more/less

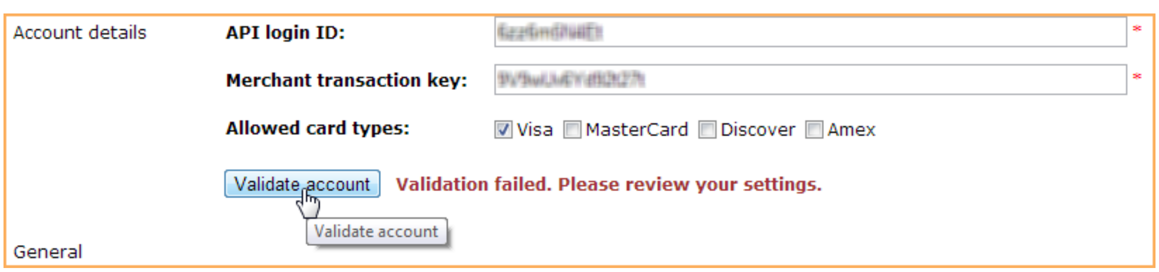
You can choose to accept online payments as well as manual payments, or just handle all payments manually. To display the **Payment settings** screen, click **Finances** under the **Settings** menu, then click **Payment settings**.

If you want your site to accept online payments, you must first set up an account with a supported payment provider. Then, from the **Pay ment settings** screen, click the **Payment system** drop-down and select your online payment system.



After you've selected your online payment system, you enter your account details. Different information is required depending on your payment system.

After entering the required account details, click **Validate account** to make sure your account details are valid.



If the account validation fails, check to make sure you entered the account details properly.

You must also select the default country you want to display to customers, and the currency you want to use in your transactions (and in your reports). The currency you choose should match the currency used in your online payment system account.

You can add different kinds of payments instructions to be displayed at different times.

Live vs. test/sandbox modes

Payment providers typically provide test or sandbox modes so you can test your payment settings before you begin accepting actual payments.

Read more/less

Within your payment settings on Wild Apricot, you can switch between live and test or sandbox connection modes. To switch to test or sandbox mode, click the **Test/Sandbox** radio button beside **Connection mode** on the **Payment settings** screen, then enter the test or sandbox account details provided by your payment provider. In some cases, payment providers allow you to test your payment settings using your actual account details.

> In test mode, you should use test credit card numbers provided to you by your payment provider. For example, PayPal provides the following test credit card numbers.

While in test mode, your payment provider will accept or decline your test transactions as it would live transactions, but will not charge any credit cards or update any bank accounts. Wild Apricot will, however, create payment records and update Wild Apricot balances as it would with live transactions.

> When integrating with iATS Payments, the connection mode is set in your iATS account settings.

When you are ready to begin accepting actual online payments, click the **Live** radio button on the **Payment settings** screen. Your payment provider will now begin recording payments and updating bank and credit card accounts depending on the validity of the payment details provided by your customers.

The table below summarizes the differences between live and test modes:

	Live mode	**Test mode**
Account details entered	Your actual account	Test or sandbox accounts
Credit cards used	Real cards	Test credit card numbers provided by payment provider (some providers allow real numbers to be used)
Bank/credit accounts are...	Updated	Not updated
Wild Apricot records are..	Updated	Updated

Supported payment systems

Wild Apricot supports a number of online payment systems.

Read more/less

Wild Apricot currently provides direct integration with the following payment processing systems:

- 2Checkout
- Authorize.Net
- BluePay – beta
- Global Payments – beta
- iATS Payments – beta
- Moneris
- PayPal Payflow Pro – beta
- PayPal Payments Advanced – beta
- PayPal Payments Standard
- PayPal Express Checkout
- PayPal Payments Pro
- Skrill – beta
- Stripe – beta
- Square (from mobile app only)

As well, you can use CRE Secure – which is not a payment provider but a payment service that acts as a middle man between Wild Apricot and your payment provider – to process payments through the following payment providers:

- Chase Paymentech Orbital
- First Data
- Litle
- NMI
- Orbital Enterprise
- PayLeap
- SagePay
- SkipJack
- TSYS Transit
- USA ePAY
- eProcessing Network

If you have already set up an account with one of the payment systems supported by Wild Apricot, you can click on the appropriate link above to jump to instructions on setting up that system on your site.

> You can also accept credit card payments from Wild Apricot's app using Square. For more information, see Accepting mobile payments using Square.

What does "beta" mean?

Support for new online payment systems – including those integrated via CRE Secure – is being provided in a "beta" release. But what does that mean?

Read more/less

It means the new payment systems are being made available with limited testing and without support for certain features.

We have conducted full internal testing of each system, and payment processing was confirmed to work properly in our tests. However, our testing was conducted using a special developer account, and there is a theoretical possibility that using it on a live account might uncover issues yet unknown to us.

Where new payment systems support automatic recording of refunds, recurring payments, and charging cards by administrators, these functions have not been integrated into Wild Apricot. Only self-service online payment has been implemented.

> **Exception:**
> Recurring payments are supported for the PayPal Payflow Pro and Stripe payment systems.

Once the new systems have been proven to be reliable, we will consider on a case by case basis implementing these features (where supported by the payment provider).

These payment systems are available for all clients to use with Wild Apricot but you should do so at your discretion, and take the time to test your payments setting before going live.

Known issues

Read more/less

- Depending on the currency you select on the **Payment settings** screen, 2Checkout may ignore your selection when displaying the amount due on its payment screens. Instead, 2Checkout may use the customer's IP address to determine their country then convert the payment amount to the appropriate currency for that country (for example, convert US dollars to Canadian dollars for Canadian customers). Once the payment is successfully processed, the amount paid is recorded in Wild Apricot using your selected currency.
- Skrill ignores your **Default country** selection on the **Payment settings** screen. Instead, Skrill uses the customer's IP address to determine the default country value.

Comparing payment systems

If you do not yet have an account with any of the supported payment systems, the information below should help you to select the most appropriate option.

Read more/less

The fees listed below are approximate, subject to change, and are charged directly by the payment processor. Wild Apricot does not charge any payment-related fees. Your only payment to Wild Apricot is a flat monthly fee for your Wild Apricot account.

Payment system	Supported merchant locations	Currencies supported	Payment process	Recurring payments?	Typical fees (USD)
2Checkout	Any	USD, CAD, EUR, GBP, AED, ARS, AUD, BRL, CHF, DKK, HKD, ILS, INR, JPY, LTL, MXN, MYR, NOK, NZD, PHP, RON, RUB, SEK, SGD, TRY, ZAR	Buyers are redirected to a secure 2Checkout.com payment screen to make the payment using their credit or debit card.	Not currently supported by Wild Apricot	Depends on country
Authorize.Net	US, Canada, UK, Europe, Australia	USD, CAD, GBP, AUD	Buyers pay directly on your website with their credit card.	Yes	Setup: $49.00 Monthly: $25.00 Transaction: 2.9% + $0.30 more info...
BluePay	USA, Canada	USD, CAD	Buyers pay directly on your website with their credit card.	Not currently supported by Wild Apricot	Depends on business type. more info...
Global Payments	USA, Canada	USD, CAD	Buyers are redirected to a secure Global Payments payment screen to make the payment.	**No**	Varies depending on reseller
iATS	US, UK, Canada	USD, CAD, GBP	Buyers pay directly on your website with their credit card.	Not currently supported by Wild Apricot	Depends on country
Moneris	US, Canada	USD, CAD, EUR, GBP, AUD, BRL, CHF, CZK, DKK, HKD, HUF, ILS, JPY, MXN, MYR, NOK, NZD, PHP, PLN, SEK, SGD, THB, TRY, TWD	Buyers pay directly on your website with their credit card.	Yes	Setup: $75 Monthly: $35-$45 Transaction: 1.8% to 3.5% + $0.15
PayPal Payflow Pro	US, Canada, UK, AUS, NZ, more...	USD, CAD, EUR, GBP, AUD, BRL, CHF, CZK, DKK, HKD, HUF, ILS, JPY, MXN, MYR, NOK, NZD, PHP, PLN, SEK, SGD, THB, TRY, TWD	Buyers pay directly on your website with their credit card.	Yes ($10/month)	Setup: $99 Monthly: $25.00 Transaction: $0.10 more info...

PayPal Express Checkout	US, Canada, UK, AUS, NZ, more...	USD, CAD, EUR, GBP, AUD, CHF, CZK, DKK, HKD, HUF, JPY, NOK, NZD, PLN, SEK, SGD	Buyers are redirected to PayPal website to log in or enter their credit card details then return to your website to confirm and complete the purchase.	Yes	Transaction: 2.2%-2.9% + $0.30 more info...
PayPal Payments Advanced	US, Canada, UK, AUS, NZ, more...	USD, CAD, EUR, GBP, AUD, BRL, CHF, CZK, DKK, HKD, HUF, ILS, JPY, MXN, MYR, NOK, NZD, PHP, PLN, SEK, SGD, THB, TRY, TWD	Payment is processed at PayPal website. Buyers can use their PayPal account or enter credit or debit card details.	**No**	Monthly: $10.00 Transaction: 2.2%-2.9% + $0.30 more info...
PayPal Payments Pro	US, Canada, UK	USD, CAD, EUR, GBP, AUD, CHF, CZK, DKK, HKD, HUF, JPY, NOK, NZD, PLN, SEK, SGD	Buyers can pay directly on your website with their credit card or select to pay via PayPal Express Checkout.	Yes*	Monthly: $35.00 Transaction: 2.2%-2.9% + $0.30 more info...
PayPal Payments Standard	US, Canada, UK, AUS, NZ, more...	USD, CAD, EUR, GBP, AUD, BRL, CHF, CZK, DKK, HKD, HUF, ILS, JPY, MXN, MYR, NOK, NZD, PHP, PLN, SEK, SGD, THB, TRY, TWD	Payment is processed at PayPal website. Buyers can use their PayPal account or enter credit or debit card details.	Yes	Transaction: 2.2%-2.9% + $0.30 more info...
Skrill (formerly Moneybookers)	More than 200 countries (see list)	USD, CAD, EUR, GBP, AED, AUD, BGN, BHD, CHF, CZK, DKK, HKD, HRK, HUF, ILS, INR, ISK, JOD, JPY, KRW, KWD, LTL, LVL, MAD, MYR, NOK, NZD, OMR, PLN, QAR, RON, RSD, SAR, SEK, SGD, THB, TND, TRY, TWD	Buyers are redirected to a secure Moneybookers payment screen to make the payment using a credit card or bank transfer.	Not currently supported by Wild Apricot	more info...
Stripe	List	List	Buyers pay directly on your website with their credit card.	Yes	Transaction: 2.9% + $0.30 more info...

* Customers have reported issues using recurring payments with PayPal Payments Pro. You might consider switching to PayPal Payflow Pro if you plan to use recurring payments.

If you are using PayPal Payments Standard, you should consider the PayPal Express Checkout option since it provides better support for recurring payments for the same cost.

Making online payments

Members and visitors to your site can pay online for membership, events, and donations using self-service forms.

Read more/less

There are several online self-service forms available to members and visitors to your site:

- Membership application form
- Membership renewals and membership level upgrades (see Member - renew or change level)
- Event registrations (see Event calendar and event registration and Extra event registration costs)
- Online donation form

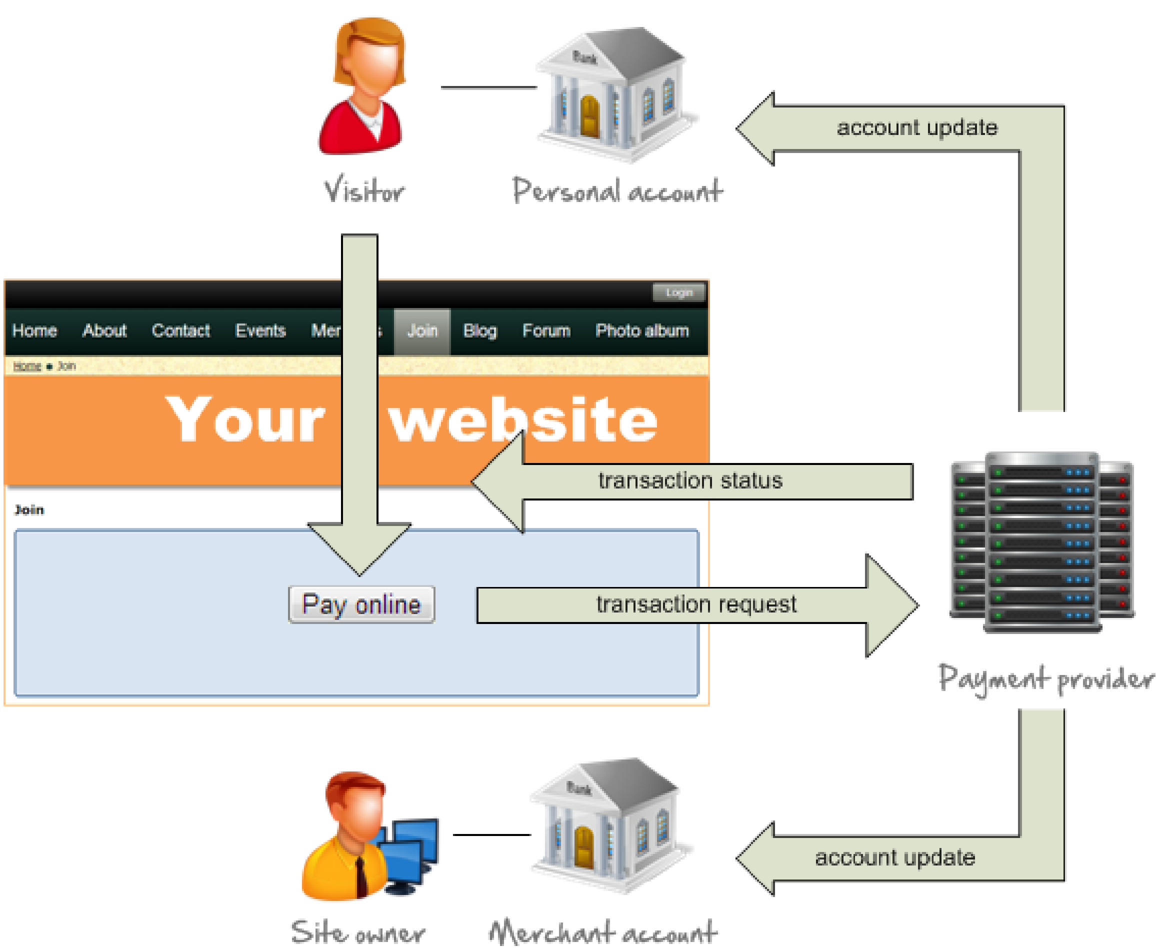
Completing any of these forms – except donation forms – will automatically generate an invoice (assuming there is a cost associated with the transaction). These invoices, as well as donations and manually generated invoices, can be immediately and securely paid online using a credit card or other payment mechanism.

Depending on the payment system you choose, the customer might be redirected to your payment provider's website (e.g. PayPal). Otherwise, the payment will be handled directly on a secure payment page provided by Wild Apricot. For a description of the payment process for each payment system, see Comparing payment systems (below).

Once the payment is confirmed, the payment system will automatically update the transaction status of the payment record in Wild Apricot and email a receipt to the payer. Depending on your settings in Wild Apricot, this can trigger further actions, such as activating membership, sending welcome emails, sending event registration receipts, or sending donation confirmations.

After the payment is processed, the customer is returned to the Invoices and payments tab on their member profile, where an invoice will appear, along with a payment entry, if the payment was successful.

> For security reasons, credit card information is not stored in Wild Apricot. Instead, the payment provider receives and processes the payment details, then returns the status of the payment transaction, which is recorded in your Wild Apricot transaction details.



On this page:

Expand all sections

See also:

- Payments - Overview
- Manual payments
- Recurring payments
- Refunds

2Checkout

Accepting online payments using 2Checkout

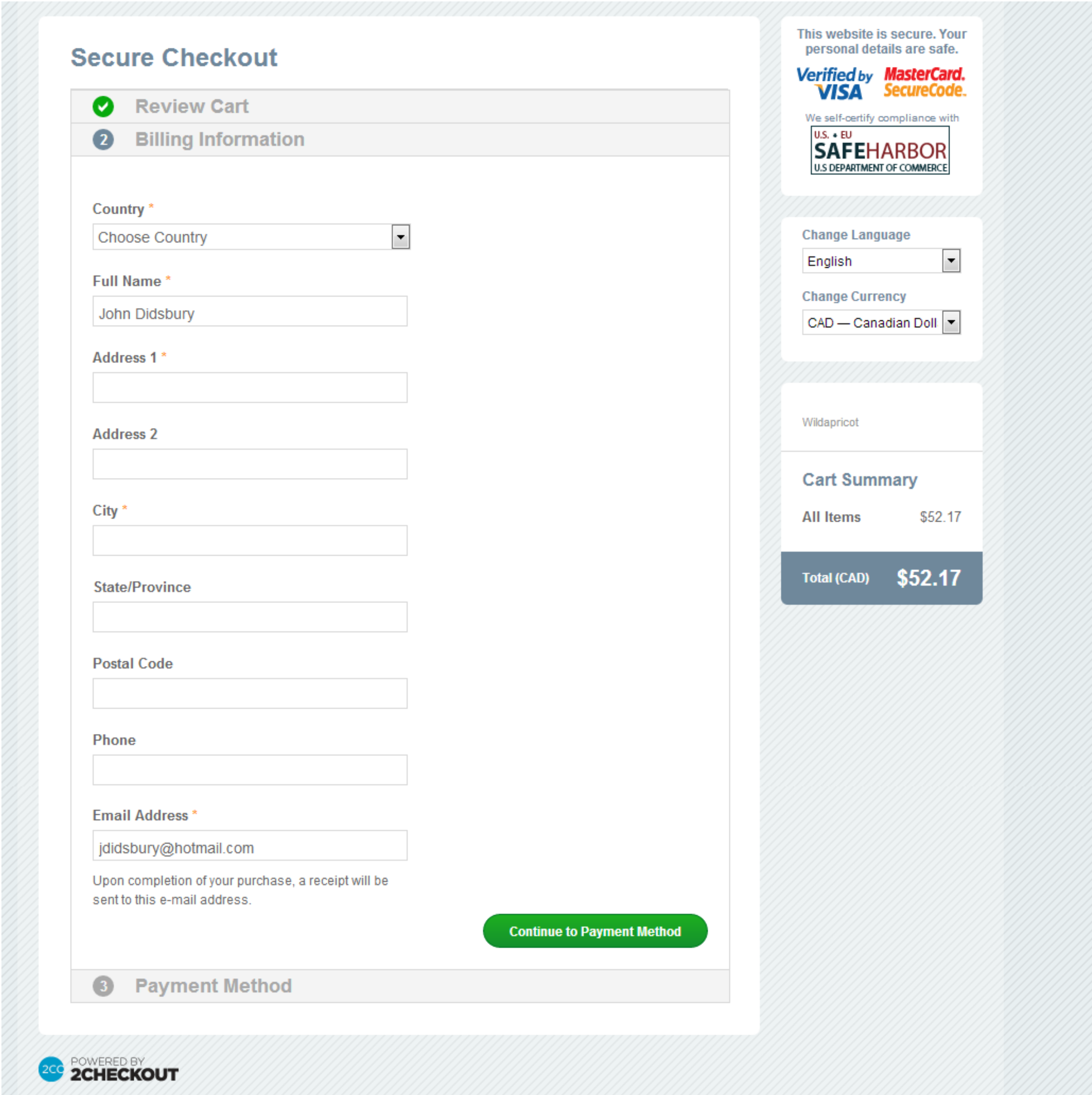
2Checkout is an online payment processing service that allows you to accept online credit card payments on your website. Before you can integrate your Wild Apricot site with 2Checkout, you must have a 2Checkout account .

Paying using 2Checkout

Once you've integrated your 2Checkout account with your Wild Apricot site, visitors to your site can pay online for membership fees and event registrations, and make donations.

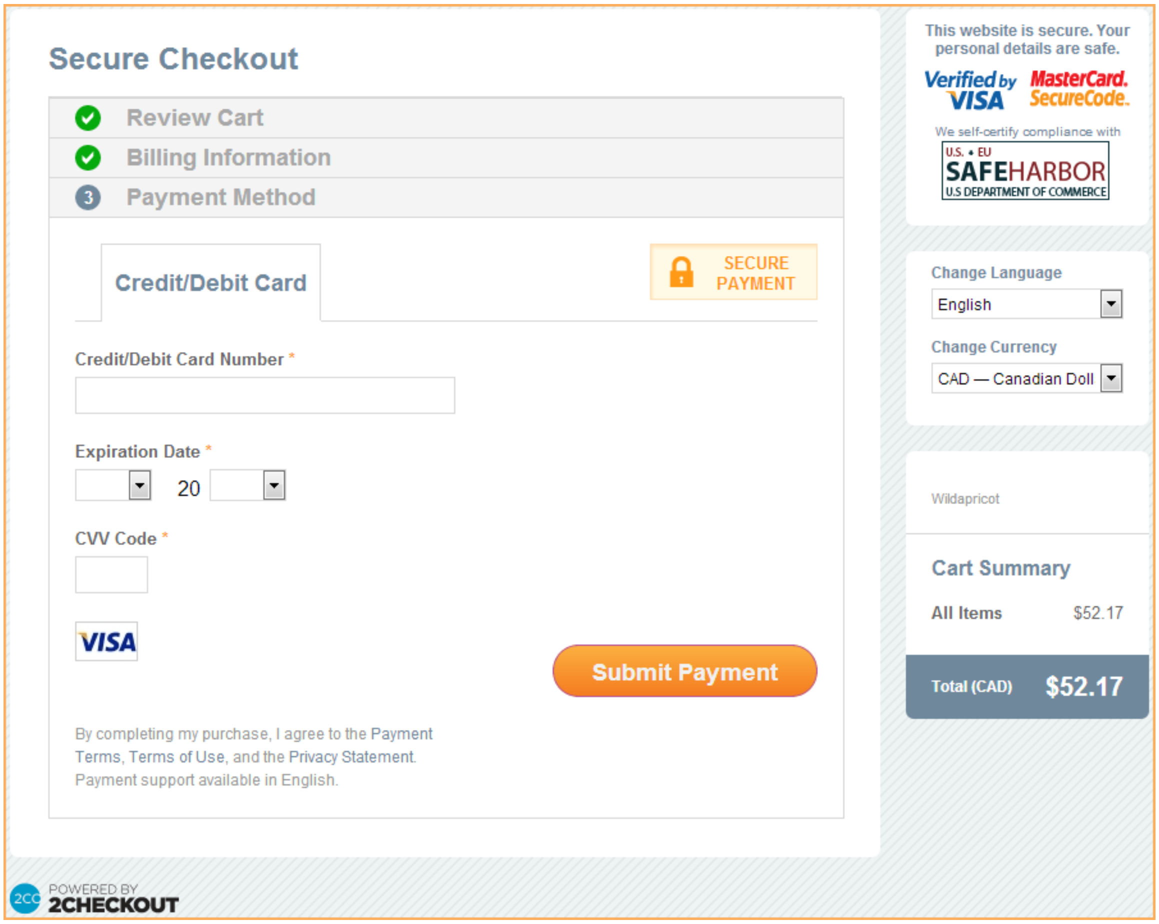
Read more/less

When a visitor fills out an integrated online form on your Wild Apricot website (e.g. membership application or event registration) and chooses to pay online, they will be redirected to a secure 2Checkout.com payment screen to make the payment.

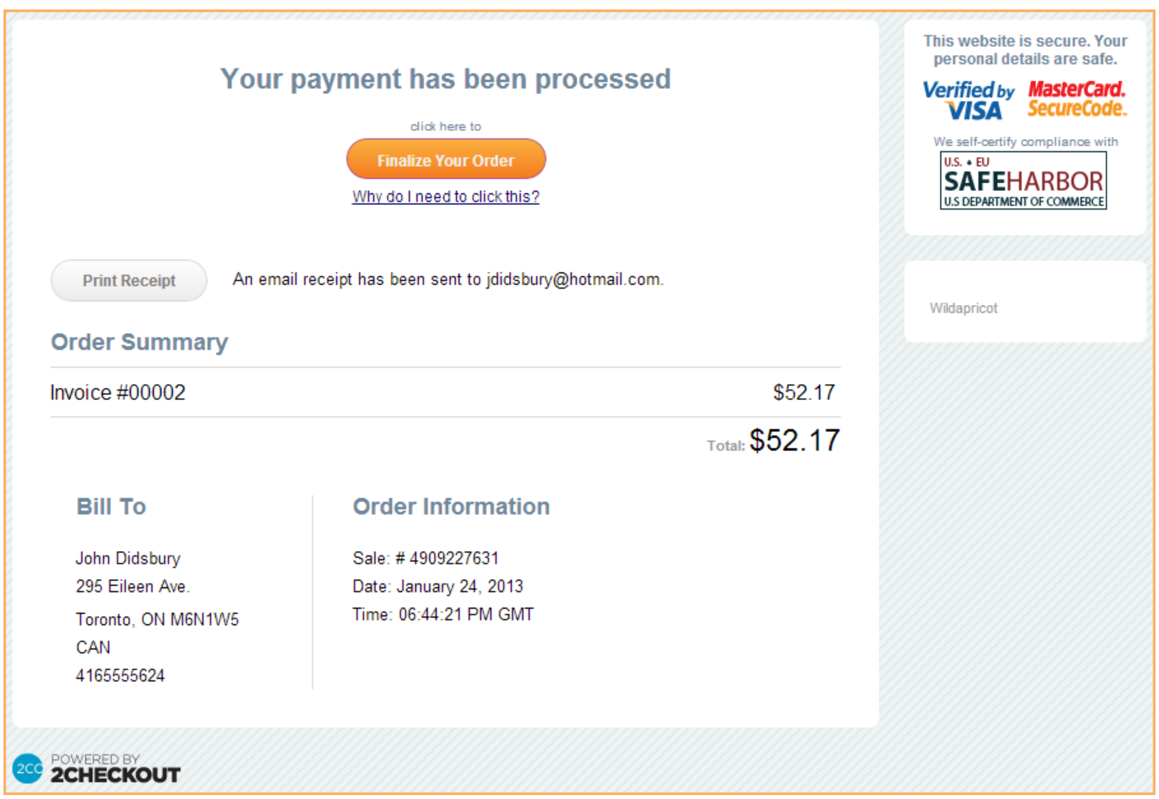


On the 2Checkout screen, they fill out their billing information, then click the **Continue to Payment Method** button.

From the Payment Method screen, they provide their credit card details then click **Submit Payment**.



On the next screen, they click **Finalize Your Order** to complete the payment.



After the payment is processed, the visitor is returned to the Invoices and payments tab on their member profile, where an invoice will appear, along with a payment entry, if the payment was successful.

For security reasons, credit card information is not stored in Wild Apricot. Instead, 2Checkout receives and processes the payment details, then returns the status of the payment transaction, which is recorded in your Wild Apricot transaction details.

Setting up your 2Checkout account

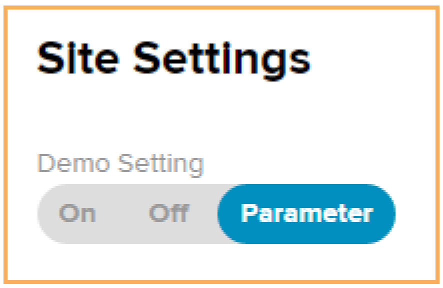
Instructions for third-party payment systems are provided as a courtesy and may contain out of date information or screen clips. For the latest instructions, consult the payment provider's website.

Before you can set up your Wild Apricot site to accept online payments using 2Checkout, you must set up a 2Checkout account. To create a 2Checkout account, click here.

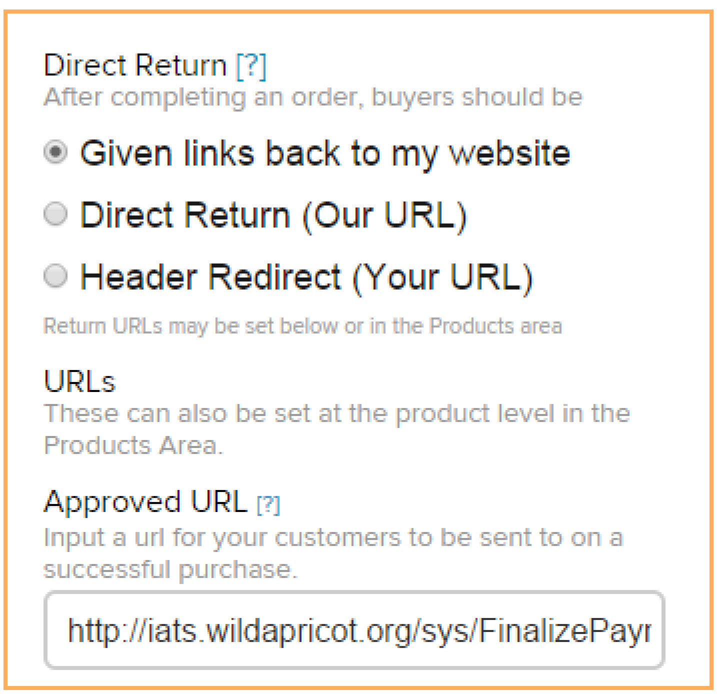
While setting up your 2Checkout account, be sure to:

Read more/less

- Set the **URL** to one of the following (depending on whether you have set up a custom domain name):
  - https://yoursitename.wildapricot.org (where *yoursitename* is your Wild Apricot domain name e.g. https://iats.wildapricot.org)
  - https://yourcustomdomainname (where *yourcustomdomainname* is your custom domain name e.g. https://iats.org)
- Set the **Demo Setting** option to **Parameter**



- Set **Direct Return** to **Given links back to my website** or **Header Redirect (Your URL)**
- Set the **Approved URL** field to http://*yoursitename*/sys/FinalizePayment or https://*yoursitename*/sys/FinalizePayment, where *yoursitename* is your Wild Apricot domain name (e.g. https://iats.wildapricot.org/sys/FinalizePayment)



Integrating your 2Checkout account with Wild Apricot

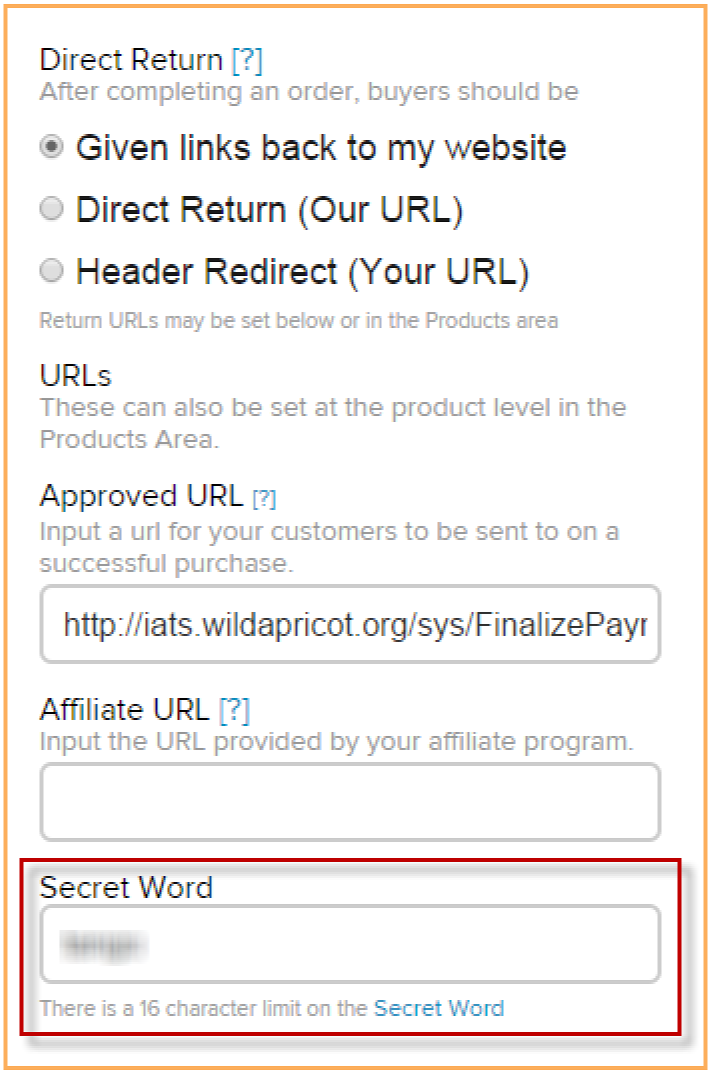
Once you've set up your 2Checkout account, you can integrate it into your Wild Apricot site.

What you need to get started

To integrate your 2Checkout account with Wild Apricot, you will need your account number and your secret word.

Read more/less

To find your secret word, log into your 2Checkout account and click the **Account** tab then the **Site management** tab. Towards the bottom of the Site Management page, you'll find your secret word.

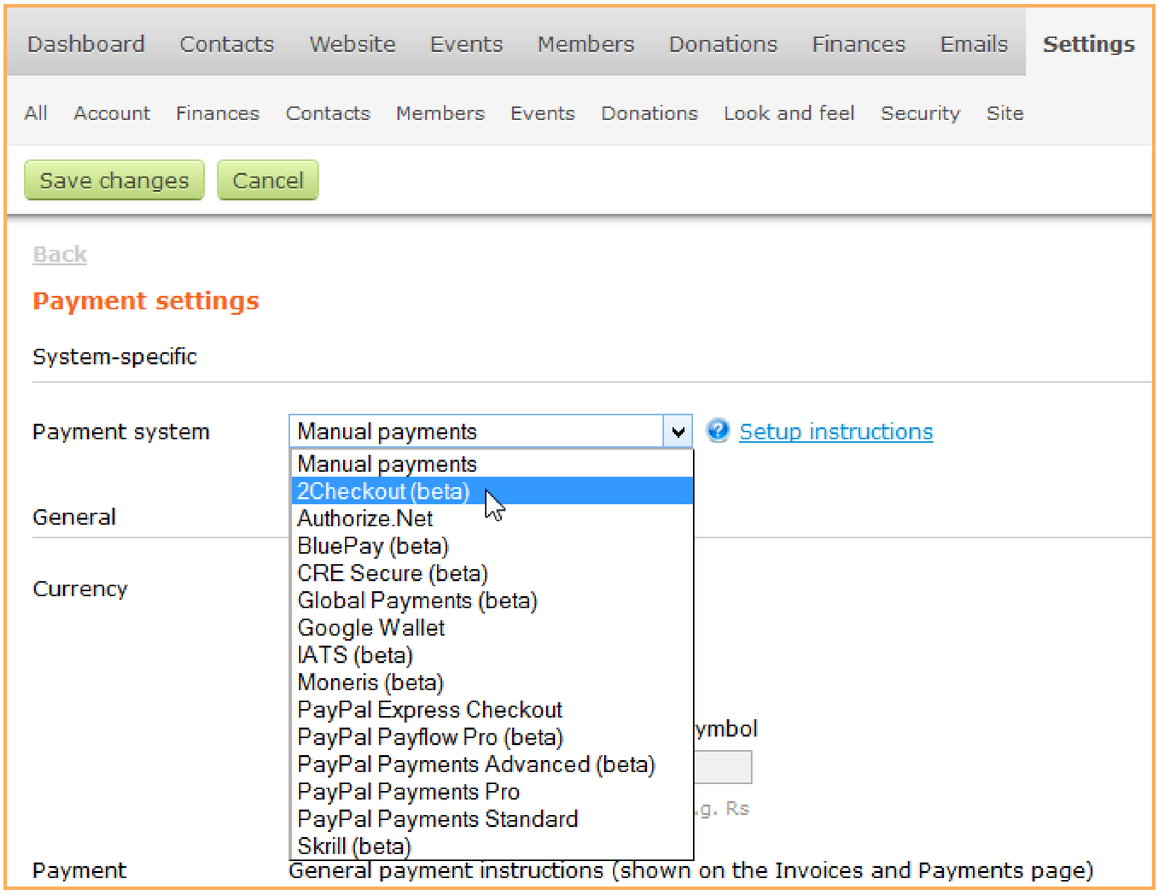


Payment settings for 2Checkout

To integrate your 2Checkout into your Wild Apricot site, follow these steps:

Read more/less

1. Under the **Settings** menu, click **Finances**.
2. From the **Finances** settings screen, click **Payment settings**.
3. On the **Payment settings** screen, click the **Edit** button.
4. Click the **Payment system** drop-down list and select **2Checkout**.



5. If you want to begin accepting online payments immediately, click the **Live** radio button. If you want to test your settings using test or sandbox accounts provided by your payment provider, click the **Test/Sandbox** radio button. While in test mode, your payment provider will accept or decline your test transactions as it would live transactions, but will not charge any credit cards or update any bank accounts. Wild Apricot will, however, create payment records and update Wild Apricot balances as it would with live transactions. For more information, see Live vs. test/sandbox modes.
6. In the **Account #** field, enter your 2Checkout account number.
7. Enter your account's **Secret word**.
8. Click the **Default country** drop-down list and select the country where the majority of your visitors reside. Your selection will appear as the default country to your customers.
9. Select the currency you want to use in your transactions. This **must** match the currency you have selected in your 2Checkout account settings. Depending on the currency you choose, 2Checkout may display the amount due using the appropriate currency for the customer's country (for example, convert US dollars to Canadian dollars for Canadian customers). Once the payment is successfully processed, the amount paid is recorded in Wild Apricot using your selected currency.

   ***Note:** Do not change the currency after your site begins accepting online payments. If you change the currency, existing payment records will not be recalculated and will no longer display correct amounts.*

10. In the **Instructions** fields, add payment instructions to be displayed to your customers.
11. Click **Save changes**.

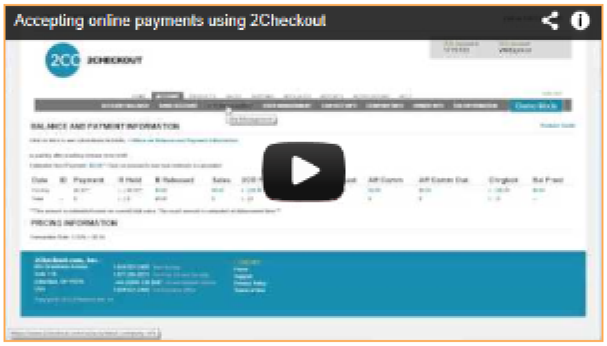
Now that you have set up your Wild Apricot site to receive online payments, a **Pay online** button will appear after a visitor to your site clicks the **Confirm** button while applying for membership or registering for an event.

Recurring payments

Recurring payments are supported by 2Checkout but are not supported by Wild Apricot during the initial implementation of this payment system.

Known issues

- Depending on the currency you select on the **Payment settings** screen, 2Checkout may ignore your selection when displaying the amount due on its payment screens. Instead, 2Checkout may use the customer's IP address to determine their country then convert the payment amount to the appropriate currency for that country (for example, convert US dollars to Canadian dollars for Canadian customers). Once the payment is successfully processed, the amount paid is recorded in Wild Apricot using your selected currency.



Video: Integrating 2Checkout (05:16)

On this page:

Expand all sections

See also:

- Online payments
- Payments overview

Authorize.Net

Accepting online payments using Authorize.Net

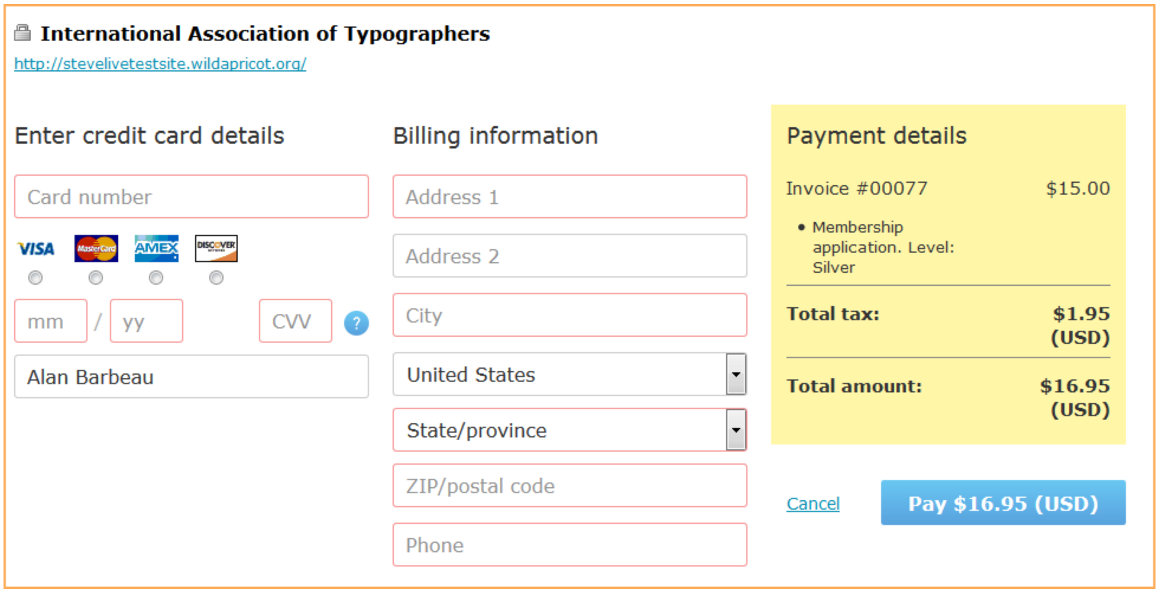
Authorize.Net is a payment gateway that allows you to accept online credit card payments on your website. Before you can integrate your Wild Apricot site with Authorize.Net, you must have an Authorize.Net account .

Paying using Authorize.Net

Once you've integrated your Authorize.Net account with your Wild Apricot site, visitors to your site can pay online for membership fees and event registrations, and make donations.

Read more/less

When a visitor fills out an integrated online form on your Wild Apricot website (e.g. membership application or event registration) and chooses to pay online, they will be directed to a secure Wild Apricot payment form to make the payment.



On the form, they fill out their credit card details and their billing information, then click the **Pay** button to complete the payment.

After the payment is processed, the visitor is returned to the Invoices and payments tab on their member profile, where an invoice will appear, along with a payment entry, if the payment was successful.

For security reasons, credit card information is not stored in Wild Apricot. Instead, it is securely transmitted to Authorize.net where it is processed. Authorize.net then returns the status of the payment transaction, which is recorded in your Wild Apricot transaction details.

Integrating your Authorize.Net account with Wild Apricot

Instructions for third-party payment systems are provided as a courtesy and may contain out of date information or screen clips. For the latest instructions, consult the payment provider's website.

Setting up your Authorize.Net account

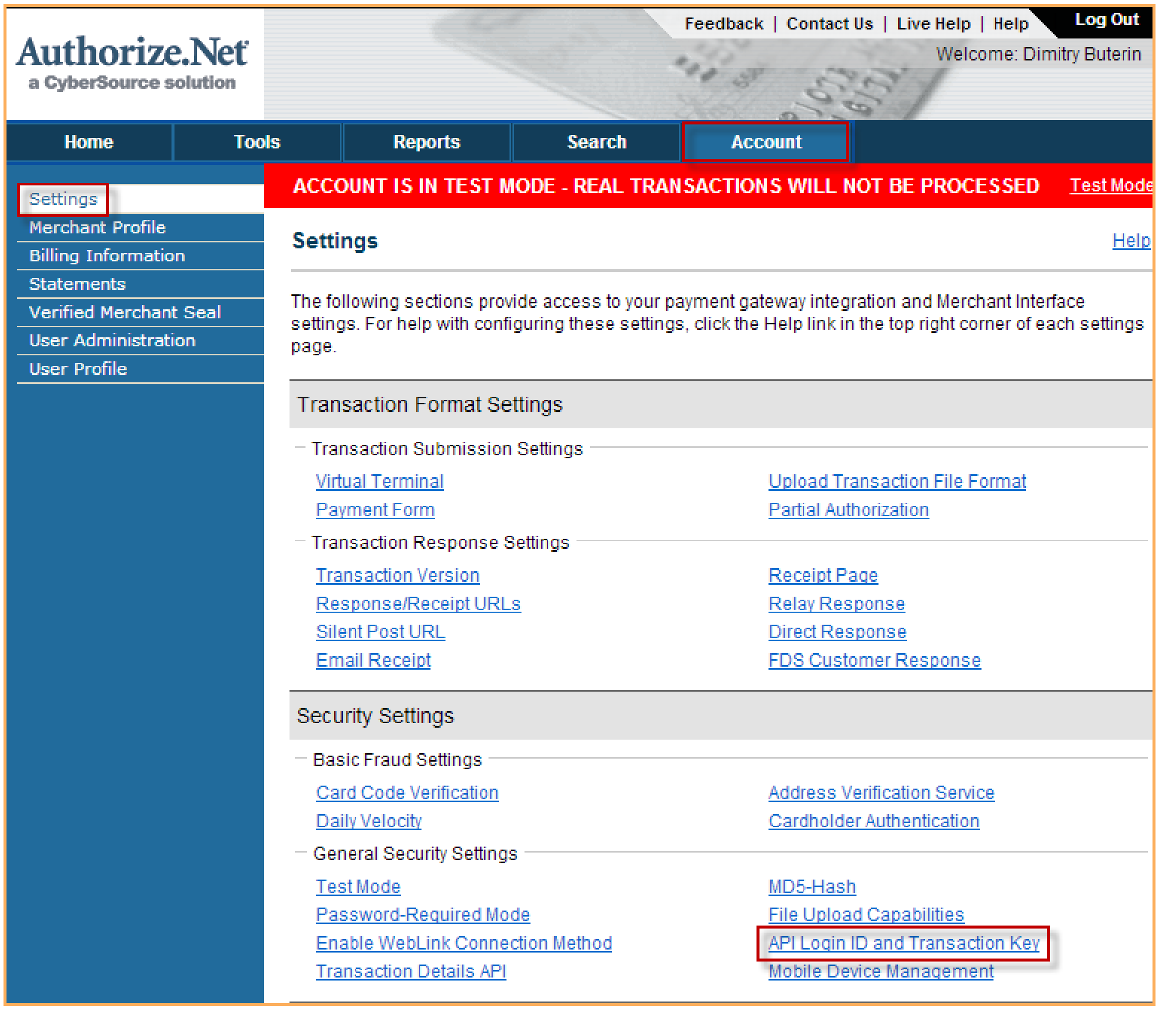
Before you can set up your Wild Apricot site to accept online payments through Authorize.Net, you must have an Authorize.Net account.

Read more/less

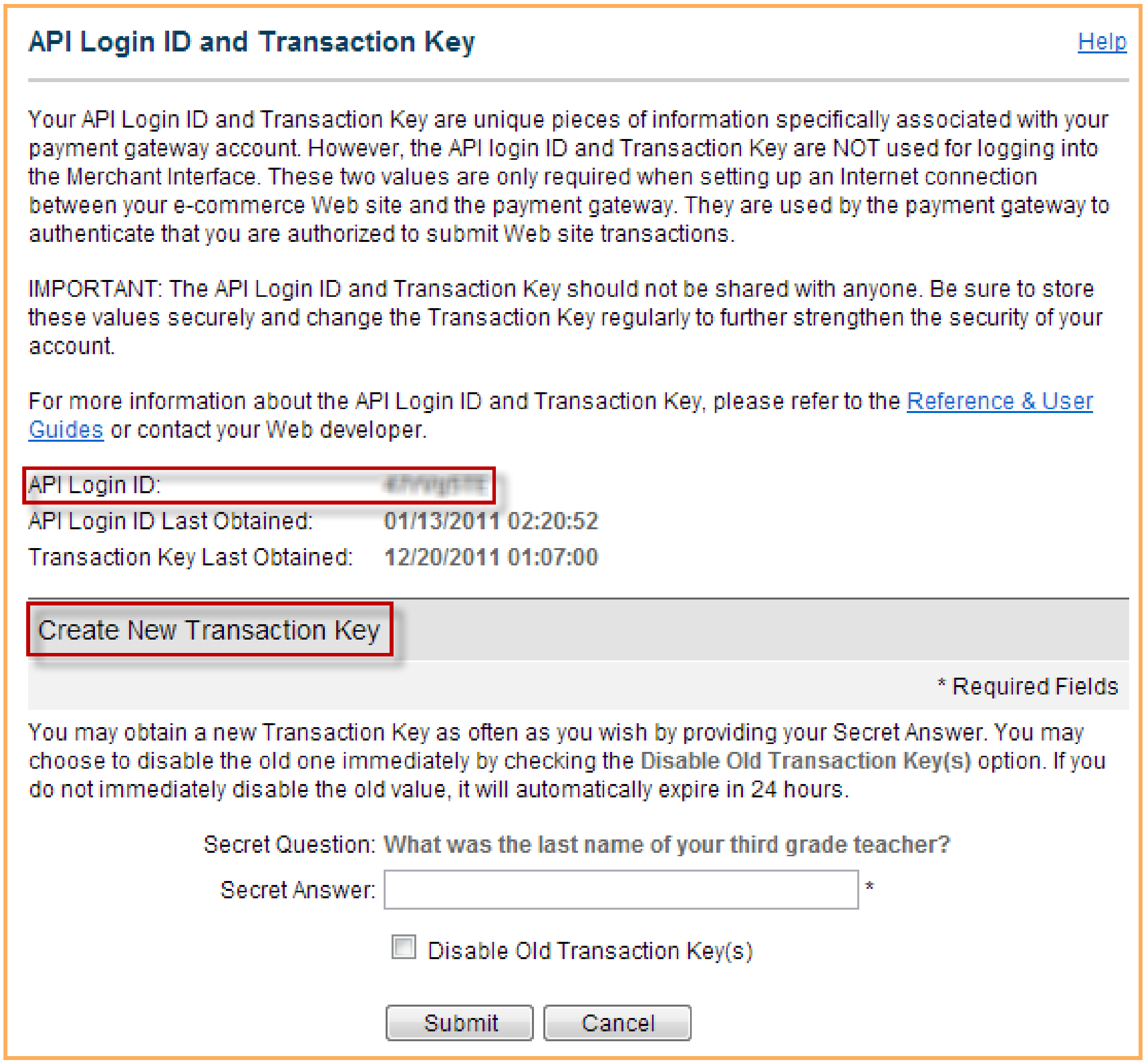
To integrate with Wild Apricot, you will need your API login ID and a transaction key from Authorize.Net. These are not the same as the login or password you use to log into Authorize.Net.

To find your API login ID and transaction key, follow these steps:

1. Log into your Authorize.Net account.
2. Under Account, click **Settings**.
3. Under **Security Settings**, click **API Login ID and Transaction Key**.



4. The API login ID will be displayed on the screen that appears. From here, you can also generate a new transaction key.



Recurring payments

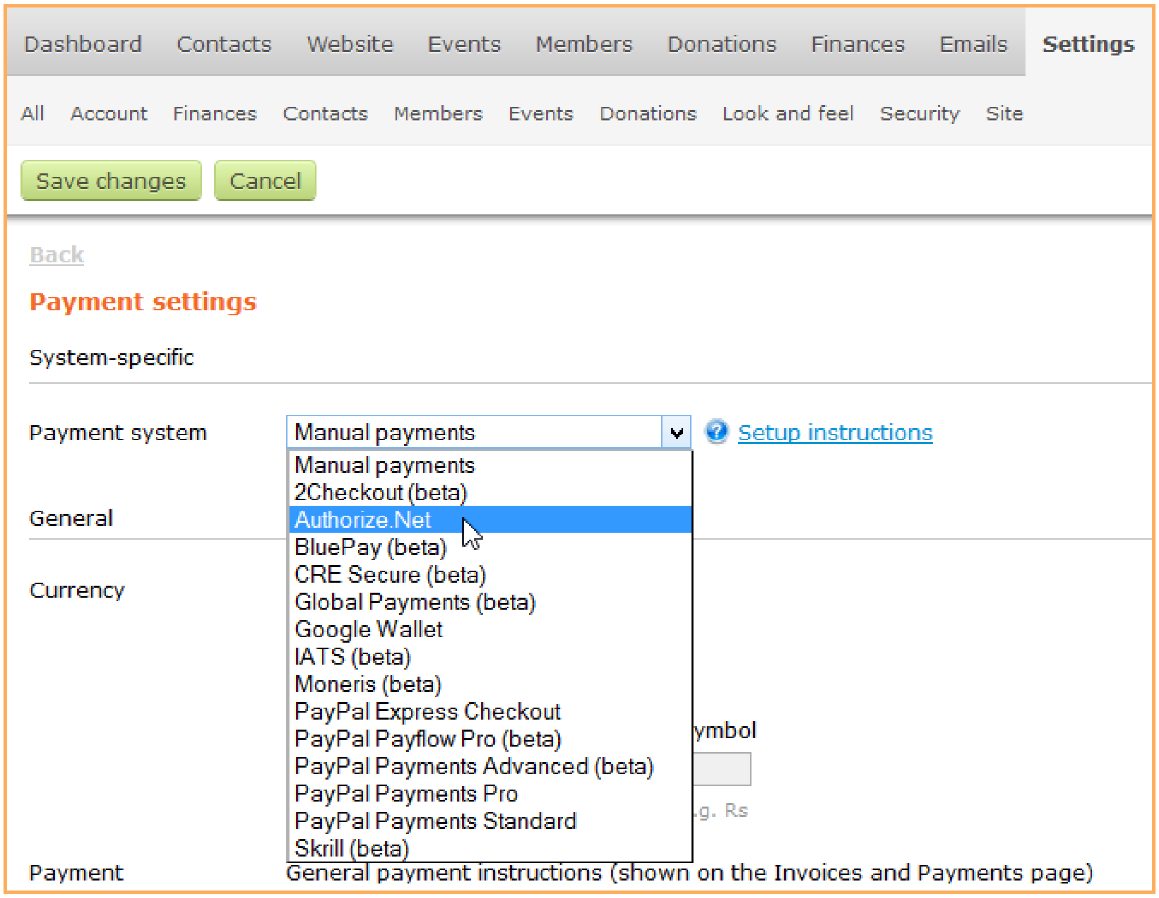
If you want to set up recurring payments for membership fees, you must enable the Customer Information Manager (CIM) service within your Authorize.Net account.

Payment settings for Authorize.Net

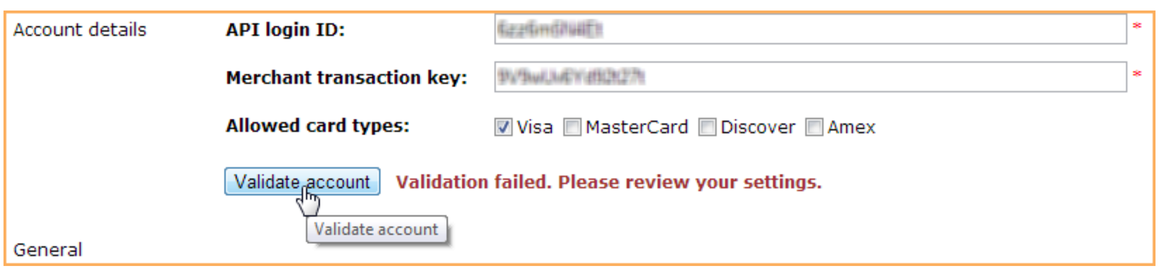
Once you have an Authorize.Net account, follow these steps to integrate Authorize.Net into your Wild Apricot site:

Read more/less

1. Under the **Settings** menu, click **Finances**.
2. From the **Finances** settings screen, click **Payment settings**.
3. On the **Payment settings** screen, click the **Edit** button.
4. Click the **Payment system** drop-down list and select **Authorize.Net**.



5. If you want to begin accepting online payments immediately, click the **Live** radio button. If you want to test your settings using test or sandbox accounts provided by your payment provider, click the **Test/Sandbox** radio button. While in test mode, your payment provider will accept or decline your test transactions as it would live transactions, but will not charge any credit cards or update any bank accounts. Wild Apricot will, however, create payment records and update Wild Apricot balances as it would with live transactions. For more information, see Live vs. test/sandbox modes.
6. Enter your **API login ID**.
7. Enter your **Merchant transaction key**.
8. Select the credit card types you want to accept. (These should match what you have set up in your Authorize.Net account.)
9. Click **Validate account** to make sure your Authorize.Net account details are valid.



   If the account validation fails, check to make sure you entered the account details properly.
10. Select the default country you want to display to the customers for online payments.
11. Select the currency you want to use in your transactions (US or Canadian dollars) – this should match your Authorize.Net account.

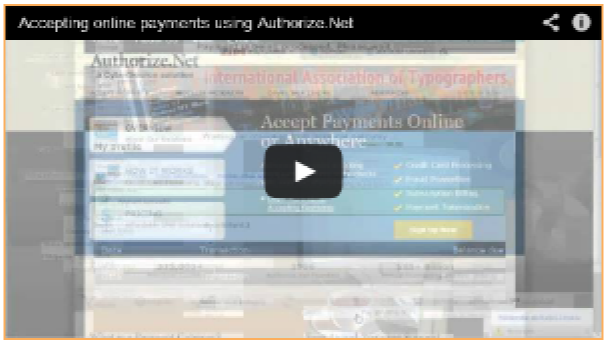
    Note: *Do not change the currency after your site begins accepting online payments. If you change the currency, existing payment records will not be recalculated and will no longer display correct amounts.*
12. Add payment instructions to be displayed to the customer.
13. Click **Save changes**.

Now that you have set up your Wild Apricot site to receive online payments, a **Pay online** button will appear after a visitor to your site clicks the **Confirm** button while applying for membership or registering for an event.

Troubleshooting

If you encounter problems using Authorize.Net to process transactions on your Wild Apricot site, check the following:

- Make sure your Authorize.Net settings match your payment settings in Wild Apricot.
- In your Authorize.net settings, make sure your account is set up as a **Card Not Present** account and not a **Card Present** account.
- Make sure that no form fields in your Authorize.Net account are defined as required. The Wild Apricot payment form only asks for name and address, so if in your Authorize.Net account there are additional required fields then an invalid configuration error will occur.
- Check your Wild Apricot audit log for transaction errors and compare them to Authorize.Net error codes.



Video: Integrating with Authorize.Net (5:25)

On this page:

- Paying using Authorize.Net
- Integrating your Authorize.Net account with Wild Apricot
    - Setting up your Authorize.Net account
    - Recurring payments
    - Payment settings for Authorize.Net
- Troubleshooting

Expand all sections

See also:

- Online payments
- Payments overview
- Recurring payments

BluePay

Accepting online payments using BluePay

BluePay is an online payment processing service that allows you to accept online credit card payments on your Wild Apricot website. Before you can integrate your Wild Apricot site with BluePay, you must have a BluePay account.

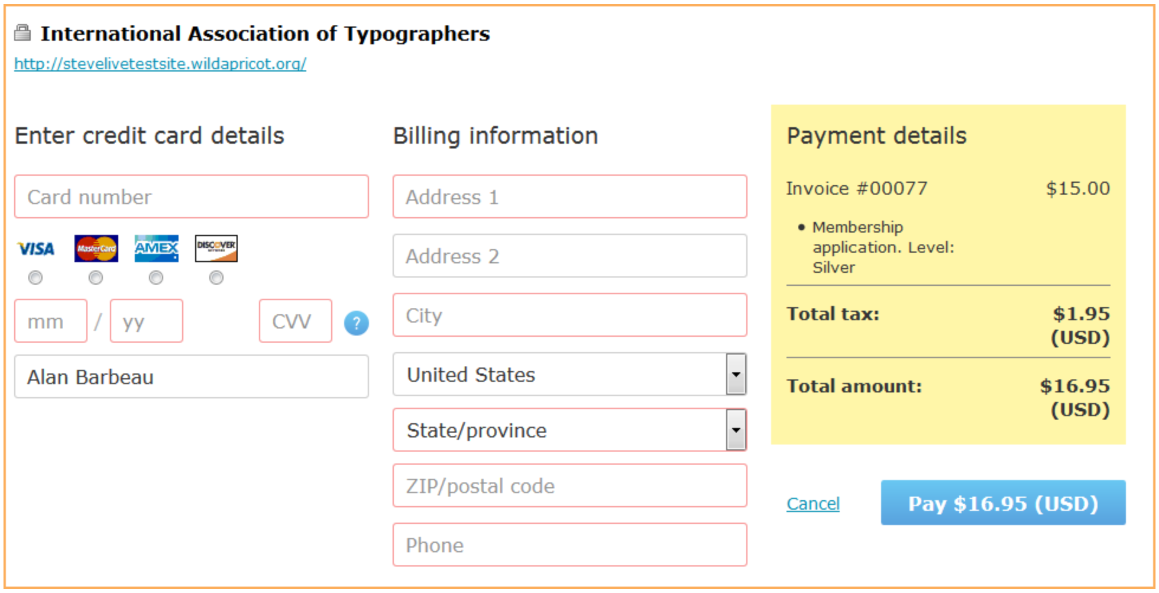
> ⚠ Support for BluePay is being provided without full testing in a live environment. During this initial implementation – the beta release – certain features such as recurring payments and automatic refunds will not be supported. For more information, see What does "beta" mean?

Paying using BluePay

Once you've integrated your BluePay account with your Wild Apricot site, visitors to your site can pay online for membership fees and event registrations, and make donations.

Read more/less

When a visitor fills out an integrated online form on your Wild Apricot website (e.g. membership application or event registration) and chooses to pay online, they will be directed to a secure Wild Apricot payment form to make the payment.



On the form, they fill out their credit card details and their billing information, then click the **Pay** button to complete the payment.

After the payment is processed, the visitor is returned to the Invoices and payments tab on their member profile, where an invoice will appear, along with a payment entry, if the payment was successful.

For security reasons, credit card information is not stored in Wild Apricot. Instead, it is securely transmitted to BluePay where it is processed. BluePay then returns the status of the payment transaction, which is recorded in your Wild Apricot transaction details.

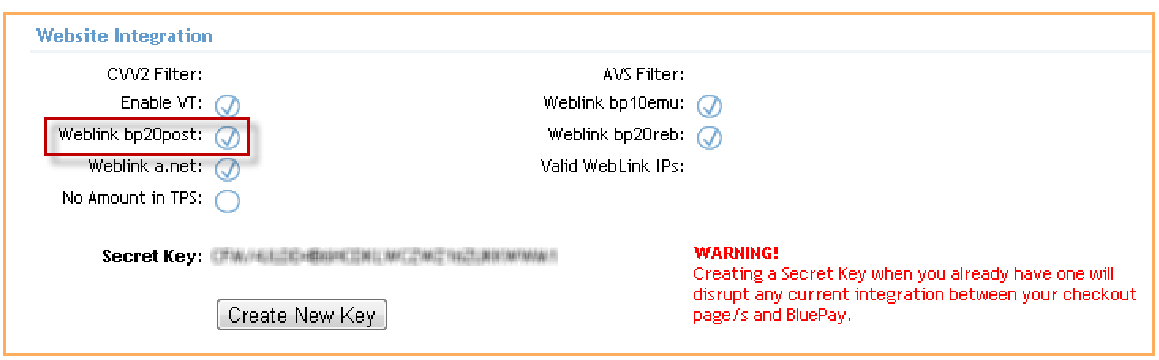
Setting up your BluePay account

Instructions for third-party payment systems are provided as a courtesy and may contain out of date information or screen clips. For the latest instructions, consult the payment provider's website.

Before you can set up your Wild Apricot site to accept online payments using BluePay, you must set up a BluePay account.

While setting up your BluePay account, be sure to check the **WebLink bp20post** option under **Website Integration** on the Account Admin page.

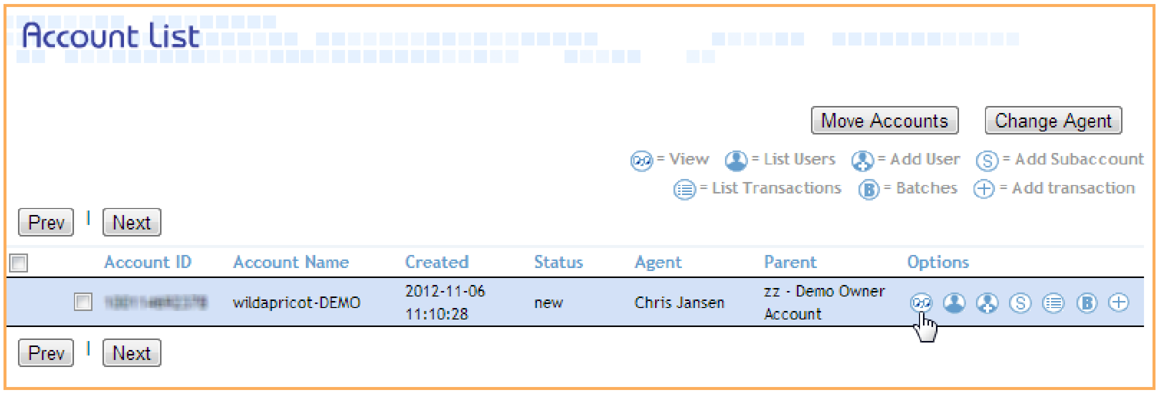
Read more/less



To display the Account Admin page:

1. Log into the BluePay Gateway Manager.
2. Click the **Administration** menu, then choose **Accounts**, then **List**.

3. On the Account List, under Options on the right-hand side, click the icon that looks like a pair of eyes.



Integrating your BluePay account with Wild Apricot

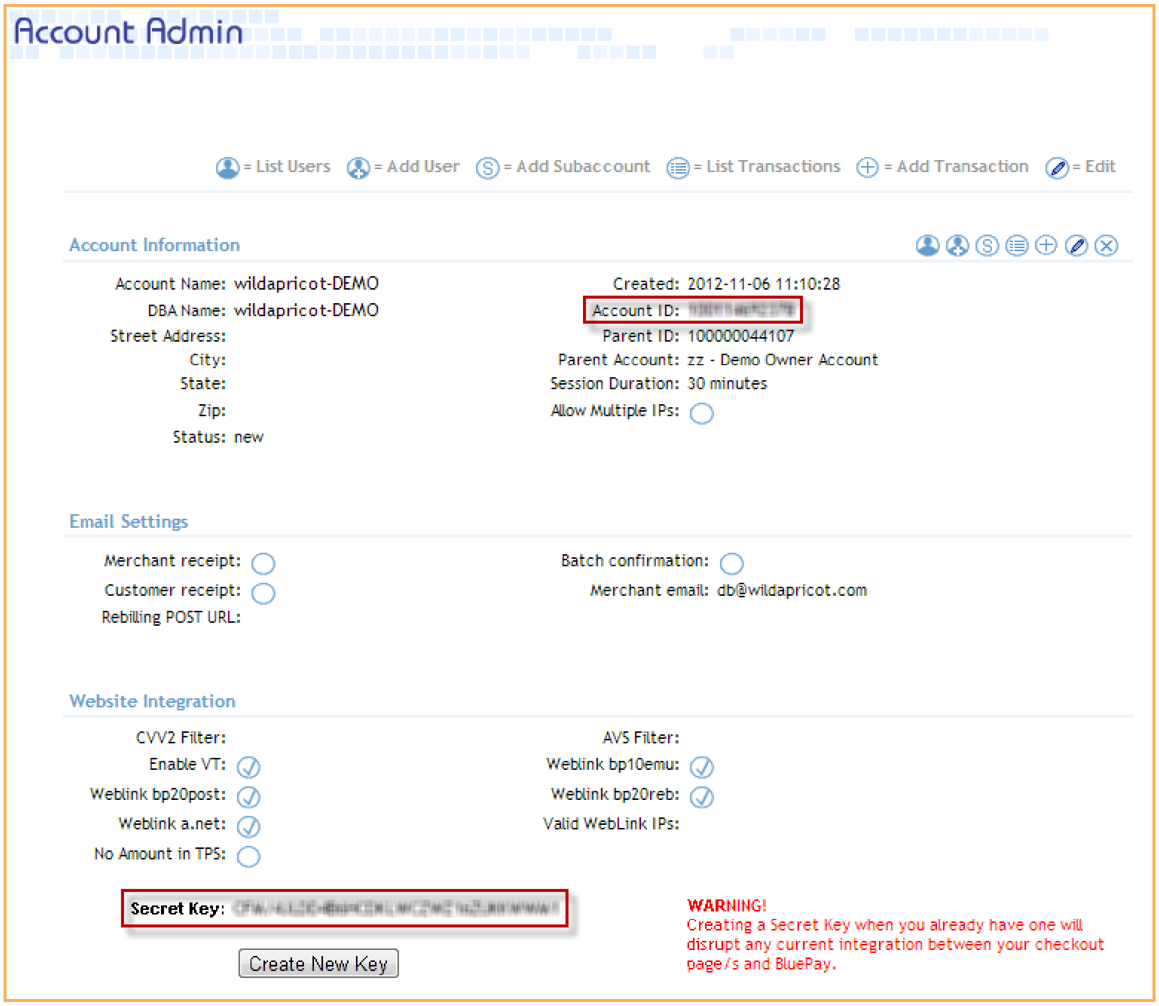
Once you've set up your BluePay account, you can integrate it into your Wild Apricot site.

What you need to get started

To integrate your BluePay account with Wild Apricot, you will need your account ID and your secret key.

Read more/less

Your secret key appears halfway down the Account Admin page in the BluePay Gateway Manager, near a large red warning. The account ID also appears on this page in the right-hand column.

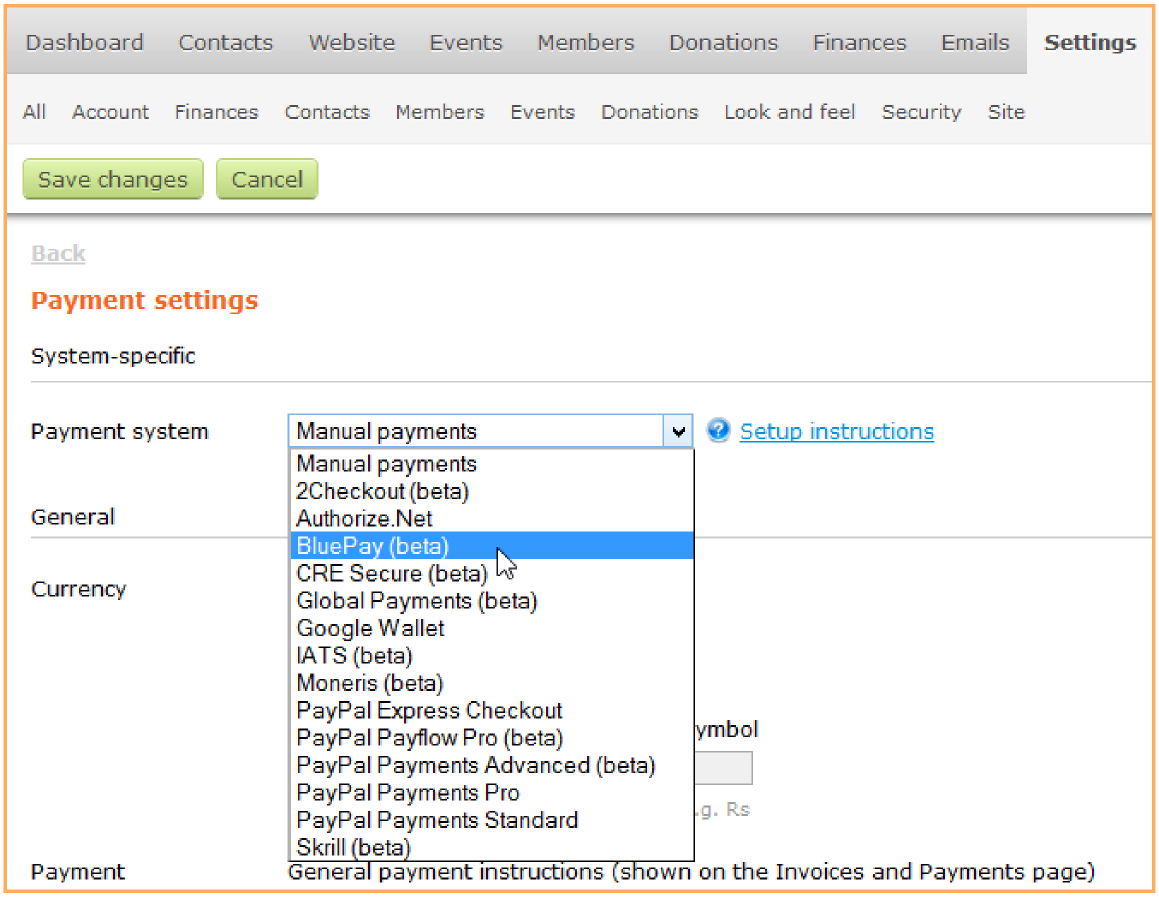


Payment settings for BluePay

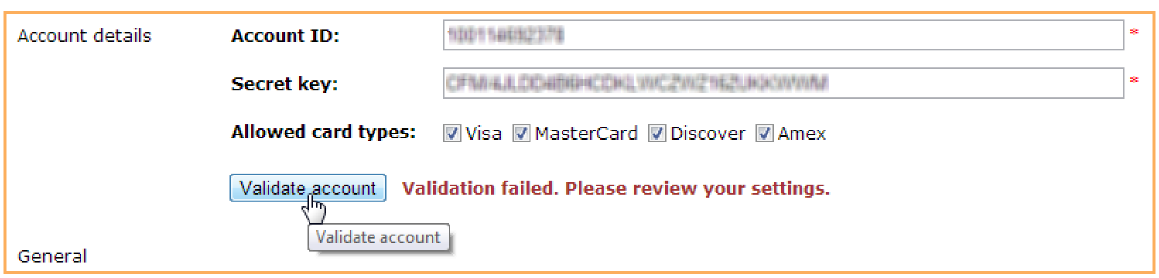
To integrate your BluePay account into your Wild Apricot site, follow these steps:

Read more/less

1. Under the **Settings** menu, click **Finances**.
2. From the **Finances** settings screen, click **Payment settings**.
3. On the **Payment settings** screen, click the **Edit** button.
4. Click the **Payment system** drop-down list and select **BluePay (beta)**.



5. If you want to begin accepting online payments immediately, click the **Live** radio button. If you want to test your settings using test or sandbox accounts provided by your payment provider, click the **Test/Sandbox** radio button. While in test mode, your payment provider will accept or decline your test transactions as it would live transactions, but will not charge any credit cards or update any bank accounts. Wild Apricot will, however, create payment records and update Wild Apricot balances as it would with live transactions. For more information, see Live vs. test/sandbox modes.
6. In the **Account ID** field, enter your BluePay account number.
7. Enter your account's **Secret key**.
8. Select the credit card types you want to accept. (These should match what you have set up in your BluePay account.)
9. Click **Validate account** to make sure your BluePay account details are valid.



If the account validation fails, check to make sure you entered the account details properly.

10. Click the **Default country** drop-down list and select the country where the majority of your visitors reside. Your selection will appear as the default country to your customers.
11. Select the currency you want to use in your transactions.

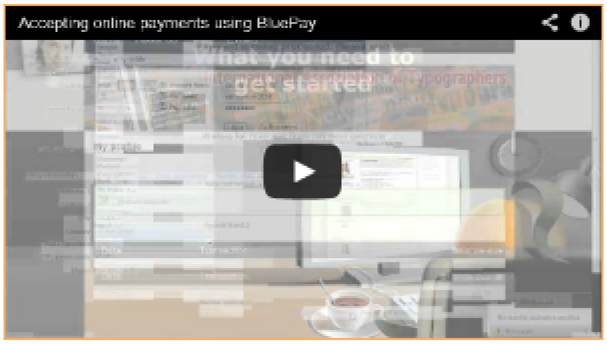
Note: *Do not change the currency after your site begins accepting online payments. If you change the currency, existing payment records will not be recalculated and will no longer display correct amounts.*

12. In the **Instructions** fields, add payment instructions to be displayed to your customers.
13. Click **Save changes**.

Now that you have set up your Wild Apricot site to receive online payments, a **Pay online** button will appear after a visitor to your site clicks the **Confirm** button while applying for membership or registering for an event.

Recurring payments

Recurring payments are supported by BluePay but are not currently supported by Wild Apricot for this payment system.



Video: Integrating BluePay (5:11)

On this page:

- Paying using BluePay
- Setting up your BluePay account
- Integrating your BluePay account with Wild Apricot
  - What you need to get started
  - Payment settings for BluePay
- Recurring payments

Expand all sections

See also:

- Online payments
- Payments overview

CRE Secure

Accepting online payments using CRE Secure

CRE Secure is an intermediary payment service that integrates with a number of payment providers. Using CRE Secure – and one of the payment providers they support – you can accept online credit card payments on your Wild Apricot website. CRE Secure acts as a middle man, providing support for payment providers that Wild Apricot does not directly support.

In addition to Authorize.Net, Global Payments, and PayPal – which are directly supported by Wild Apricot – CRE Secure supports the following payment providers:

- Chase Paymentech Orbital
- First Data
- Litle
- NMI
- Orbital Enterprise
- PayLeap
- SagePay
- SkipJack
- TSYS Transit
- USA ePAY
- eProcessing Network

Before you can integrate your Wild Apricot site with CRE Secure, you must have a CRE Secure account, and an account with one of the payment providers supported by CRE Secure.

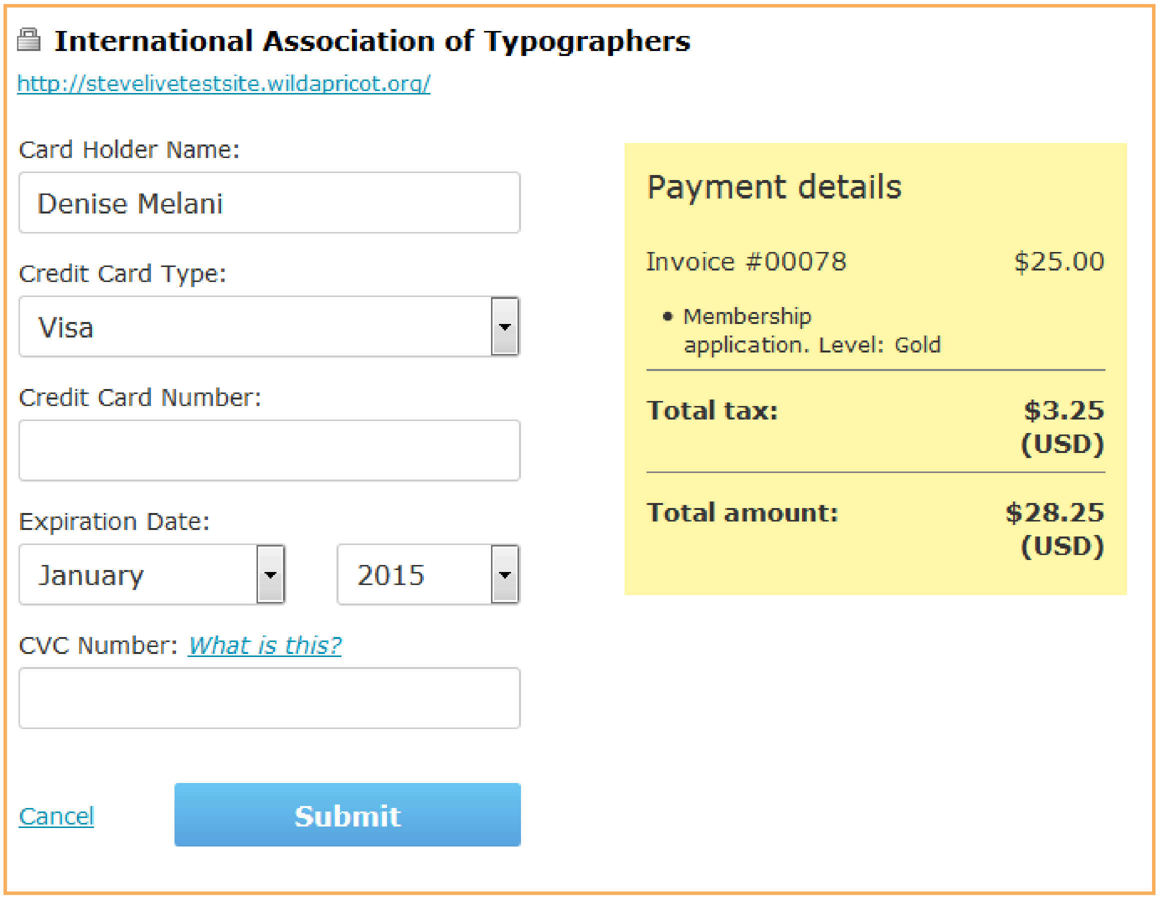
Support for CRE Secure is being provided without full testing in a live environment. During this initial implementation – the beta release – certain features such as recurring payments and automatic refunds will not be supported. For more information, see What does "beta" mean?

Paying using CRE Secure

Once you've integrated your CRE Secure account with your Wild Apricot site, visitors to your site can pay online for membership fees and event registrations, and make donations.

Read more/less

When a visitor fills out an integrated online form on your Wild Apricot website (e.g. membership application or event registration) and chooses to pay online, they will be redirected to a CRE Secure payment screen to make the payment.



On the CRE Secure payment screen, they fill out their credit card information then click the **Submit** button to complete the transaction.

After the payment is processed, the visitor is returned to the Invoices and payments tab on their member profile, where an invoice will appear, along with a payment entry, if the payment was successful.

For security reasons, credit card information is not stored in Wild Apricot. Instead, CRE Secure receives and processes the payment details, then returns the status of the payment transaction, which is recorded in your Wild Apricot transaction details.

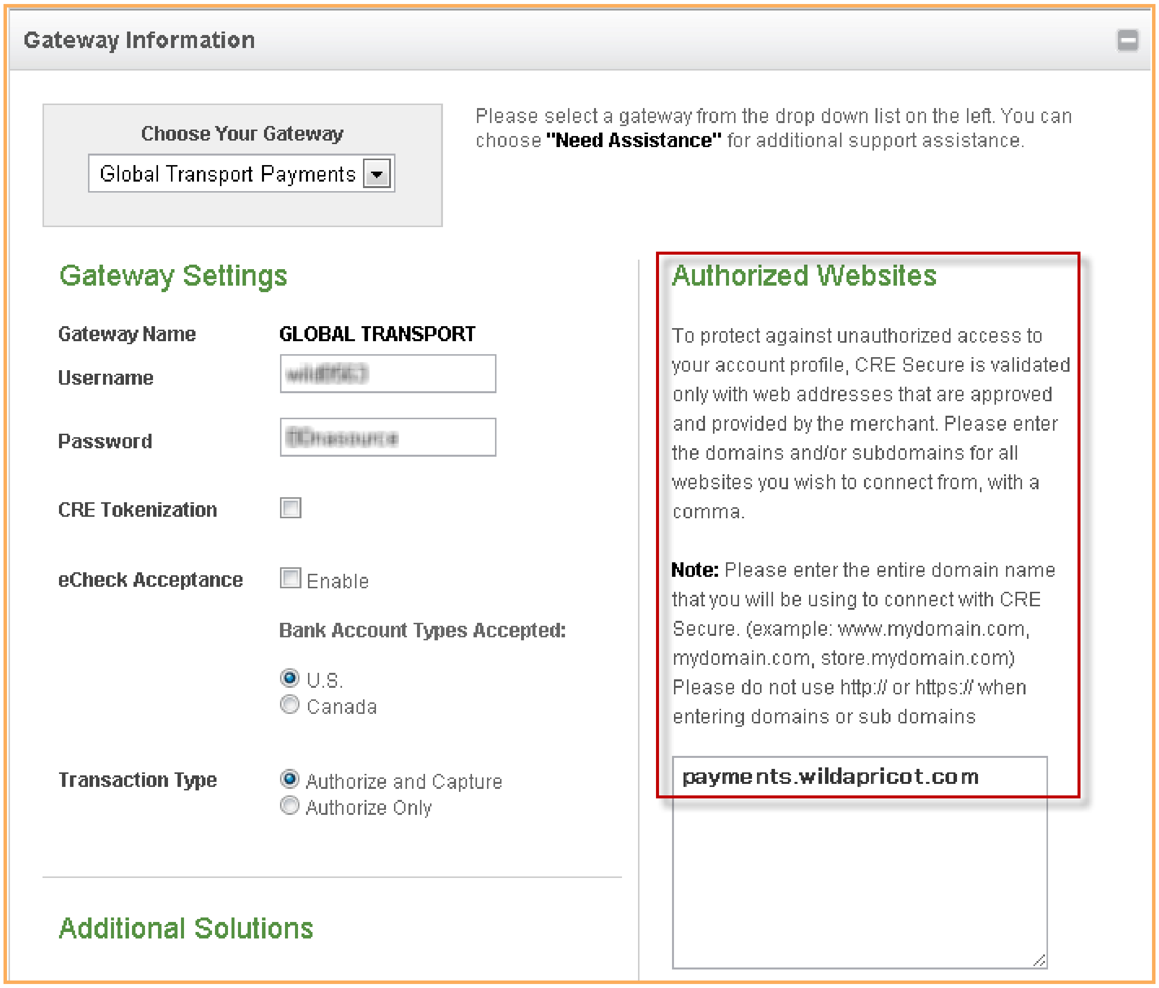
Setting up your CRE Secure account

Instructions for third-party payment systems are provided as a courtesy and may contain out of date information or screen clips. For the latest instructions, consult the payment provider's website.

Before you can set up your Wild Apricot site to accept online payments using CRE Secure, you must set up a CRE Secure account. To create a CRE Secure account, click here.

While setting up your CRE Secure account, be sure to add **payments.wildapricot.com** to your list of authorized websites.

Read more/less



To access the list, log into your CRE Secure account and click **Gateway Information** under **My Profiles**.

Integrating your CRE Secure account with Wild Apricot

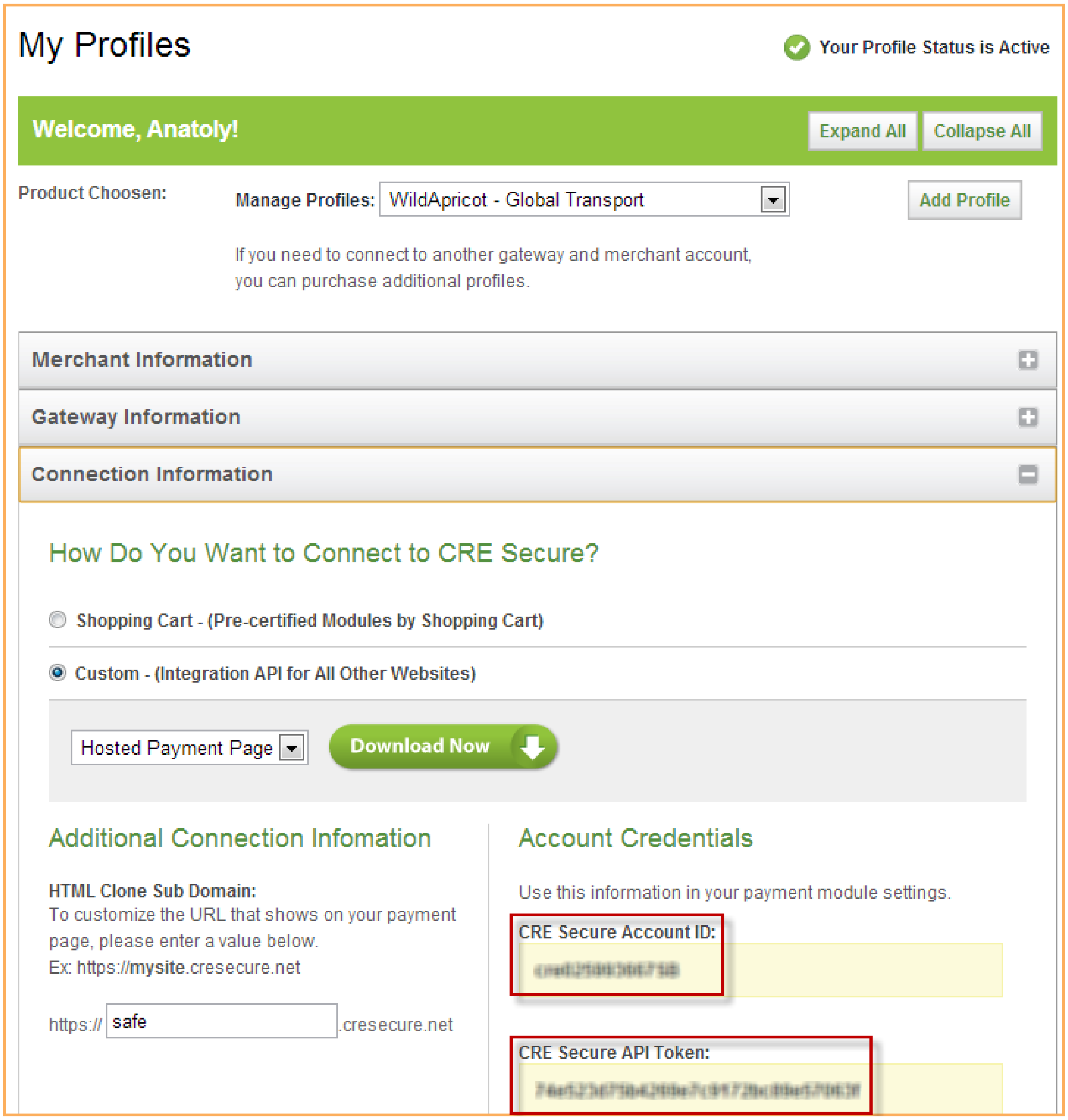
Once you've set up your CRE Secure account, you can integrate it into your Wild Apricot site.

What you need to get started

To integrate your CRE Secure account with Wild Apricot, you will need your account ID and your API token.

Read more/less

To find your account ID and API token, log into your CRE Secure account and click **Connection Information** under **My Profiles**.

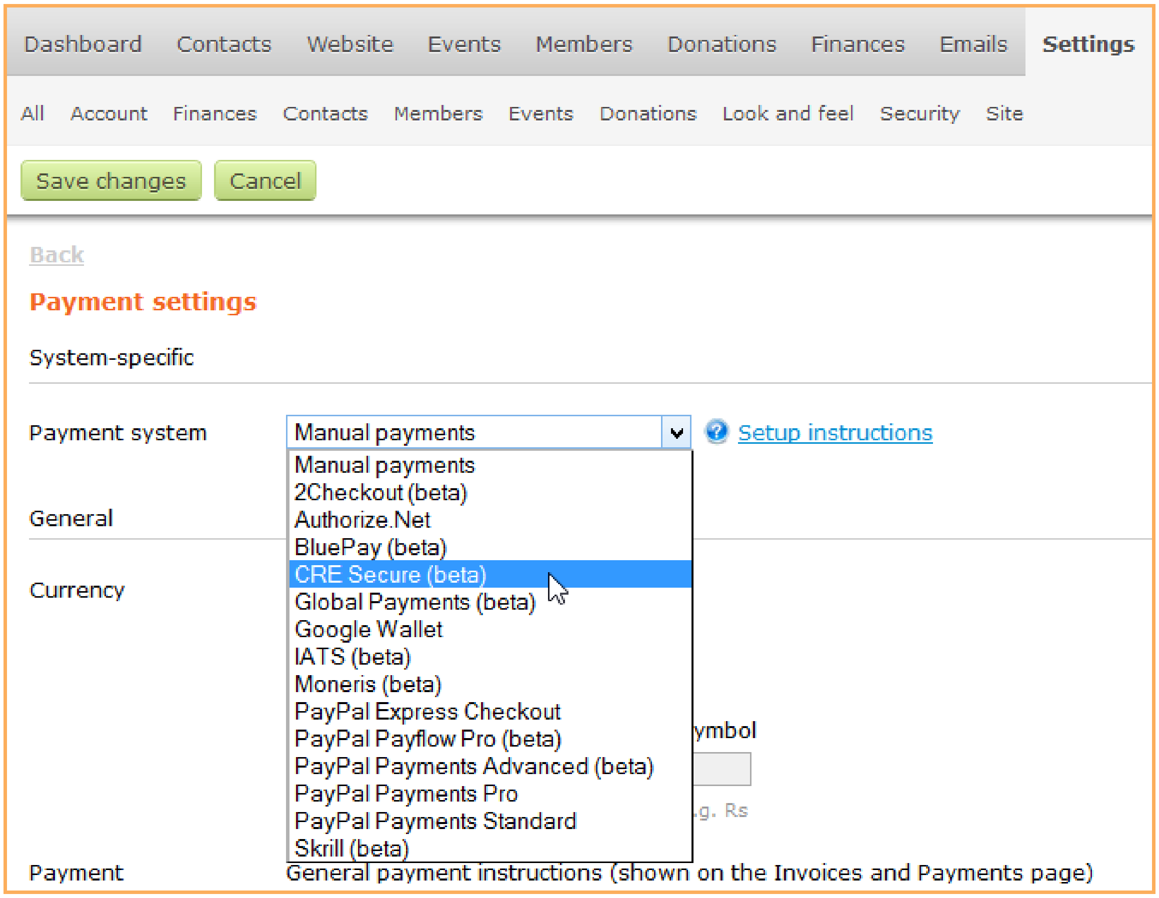


Payment settings for CRE Secure

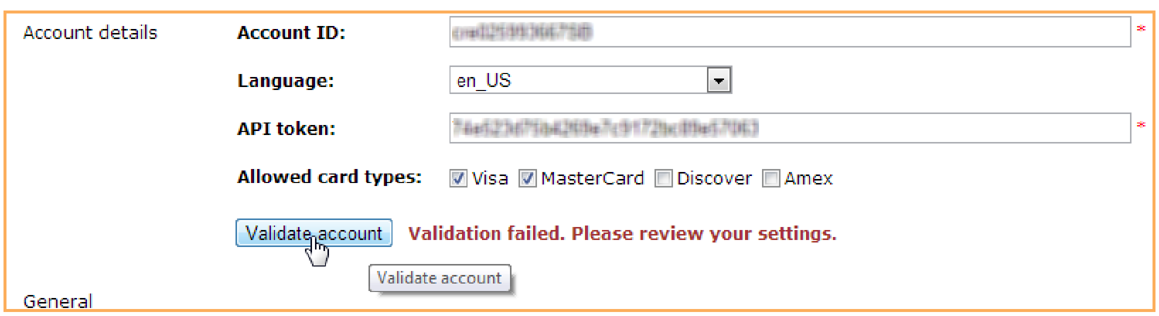
To integrate your CRE Secure account into your Wild Apricot site, follow these steps:

Read more/less

1. Under the **Settings** menu, click **Finances**.
2. From the **Finances** settings screen, click **Payment settings**.
3. On the **Payment settings** screen, click the **Edit** button.
4. Click the **Payment system** drop-down list and select **CRE Secure (beta)**.



5. If you want to begin accepting online payments immediately, click the **Live** radio button. If you want to test your settings using test or sandbox accounts provided by your payment provider, click the **Test/Sandbox** radio button. While in test mode, your payment provider will accept or decline your test transactions as it would live transactions, but will not charge any credit cards or update any bank accounts. Wild Apricot will, however, create payment records and update Wild Apricot balances as it would with live transactions. For more information, see Live vs. test/sandbox modes.
6. In the **Account ID** field, enter your CRE Secure account number.
7. Click the **Language** drop-down and select the language to be used on the payment screen.
8. Enter your account's **API token**.
9. Select the credit card types you want to accept. (These should match what you have set up in your CRE Secure account.)
10. Click **Validate account** to make sure your CRE Secure account details are valid.



If the account validation fails, check to make sure you entered the account details properly.

11. Click the **Default country** drop-down list and select the country where the majority of your visitors reside. Your selection will appear as the default country to your customers.
12. Select the currency you want to use in your transactions. This must match the currency you have set up with your payment provider.

__Note:__ Do not change the currency after your site begins accepting online payments. If you change the currency, existing payment records will not be recalculated and will no longer display correct amounts.

13. In the **Instructions** fields, add payment instructions to be displayed to your customers.
14. Click **Save changes**.

Now that you have set up your Wild Apricot site to receive online payments, a **Pay online** button will appear after a visitor to your site clicks the **Confirm** button while applying for membership or registering for an event.

Recurring payments

Recurring payments are supported by CRE Secure but are not supported by Wild Apricot during the initial implementation of this payment system.

Video: Integrating CRE Secure (5:29)

On this page:

Expand all sections

See also:

- Online payments
- Payments overview

Global Payments

Accepting online payments using Global Payments

Global Payments provides an online payment processing service called Global Transport that allows you to accept online credit card payments on your website. Before you can integrate your Wild Apricot site with Global Payments, you must have a Global Payments account.

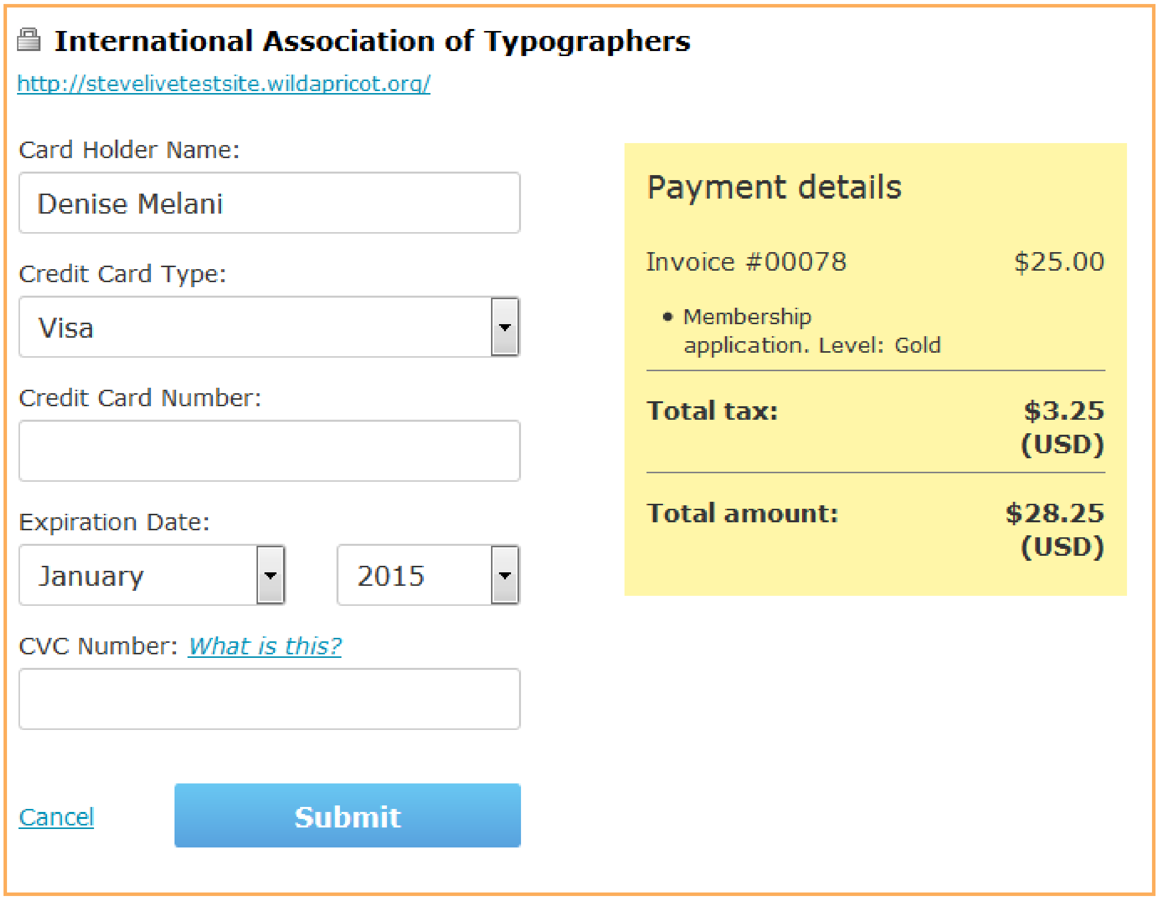
> Support for Global Payments is being provided without full testing in a live environment. During this initial implementation – the beta release – certain features such as automatic refunds will not be supported. For more information, see What does "beta" mean?

Paying using Global Payments

Once you've integrated your Global Payments account with your Wild Apricot site, visitors to your site can pay online for membership fees and event registrations, and make donations.

Read more/less

When a visitor fills out an integrated online form on your Wild Apricot website (e.g. membership application or event registration) and chooses to pay online, they will be redirected to a Global Payments payment screen to make the payment.



On the Global Payments payment screen, they fill out their credit card information then click the **Submit** button to complete the transaction.

After the payment is processed, the visitor is returned to the Invoices and payments tab on their member profile, where an invoice will appear, along with a payment entry, if the payment was successful.

> For security reasons, credit card information is not stored in Wild Apricot. Instead, Global Payments receives and processes the payment details, then returns the status of the payment transaction, which is recorded in your Wild Apricot transaction details.

Setting up your Global Payments account

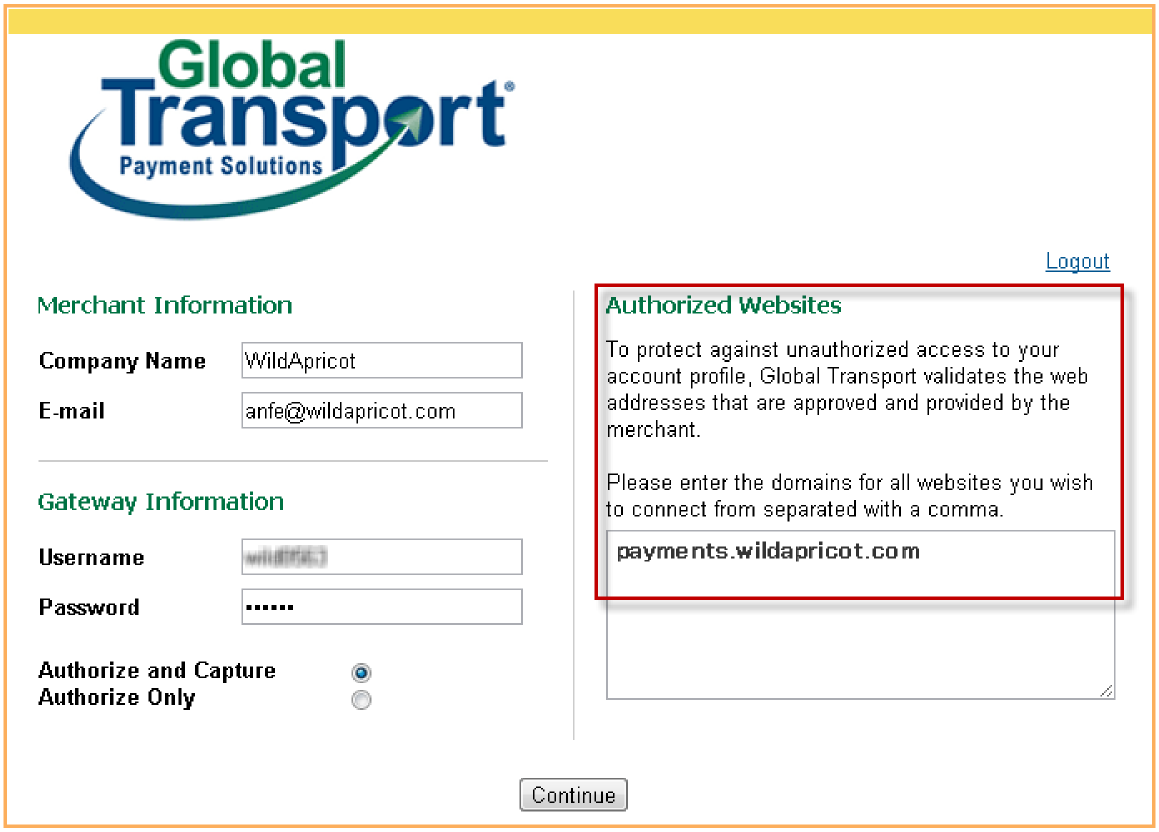
> Instructions for third-party payment systems are provided as a courtesy and may contain out of date information or screen clips. For the latest instructions, consult the payment provider's website.

Before you can set up your Wild Apricot site to accept online payments through Global Payments, you must have a Global Payments account.

Read more/less

As part of the process of setting up your Global Payments account, you need to board your Wild Apricot website onto the Global Transport Secure eCommerce Boarding site.

While setting up your Global Payments account, be sure to add **payments.wildapricot.com** to your list of authorized websites.



Integrating your Global Payments account with Wild Apricot

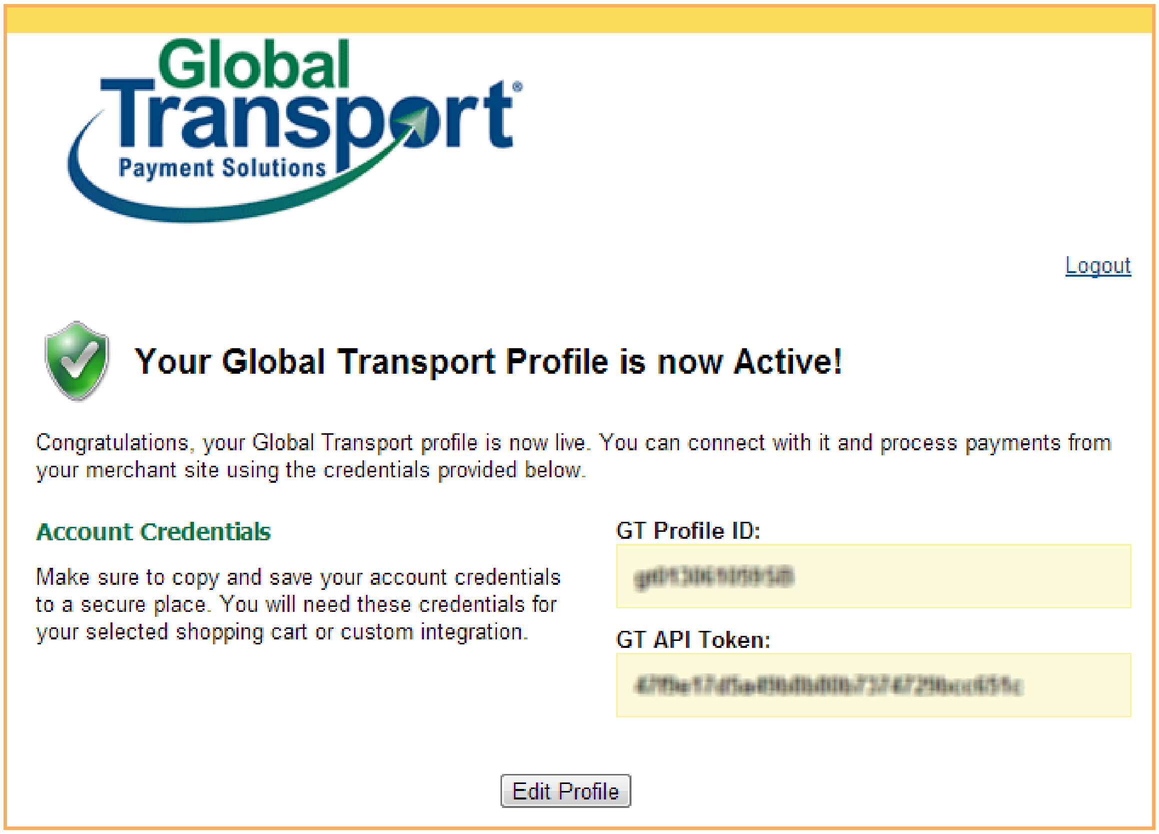
Once you've set up your Global Payments account, you can integrate it into your Wild Apricot site.

What you need to get started

To integrate your Global Payments account with Wild Apricot, you will need your profile ID and your API token.

Read more/less

Your profile ID and API token are displayed to you when you activate your Global Transport profile.

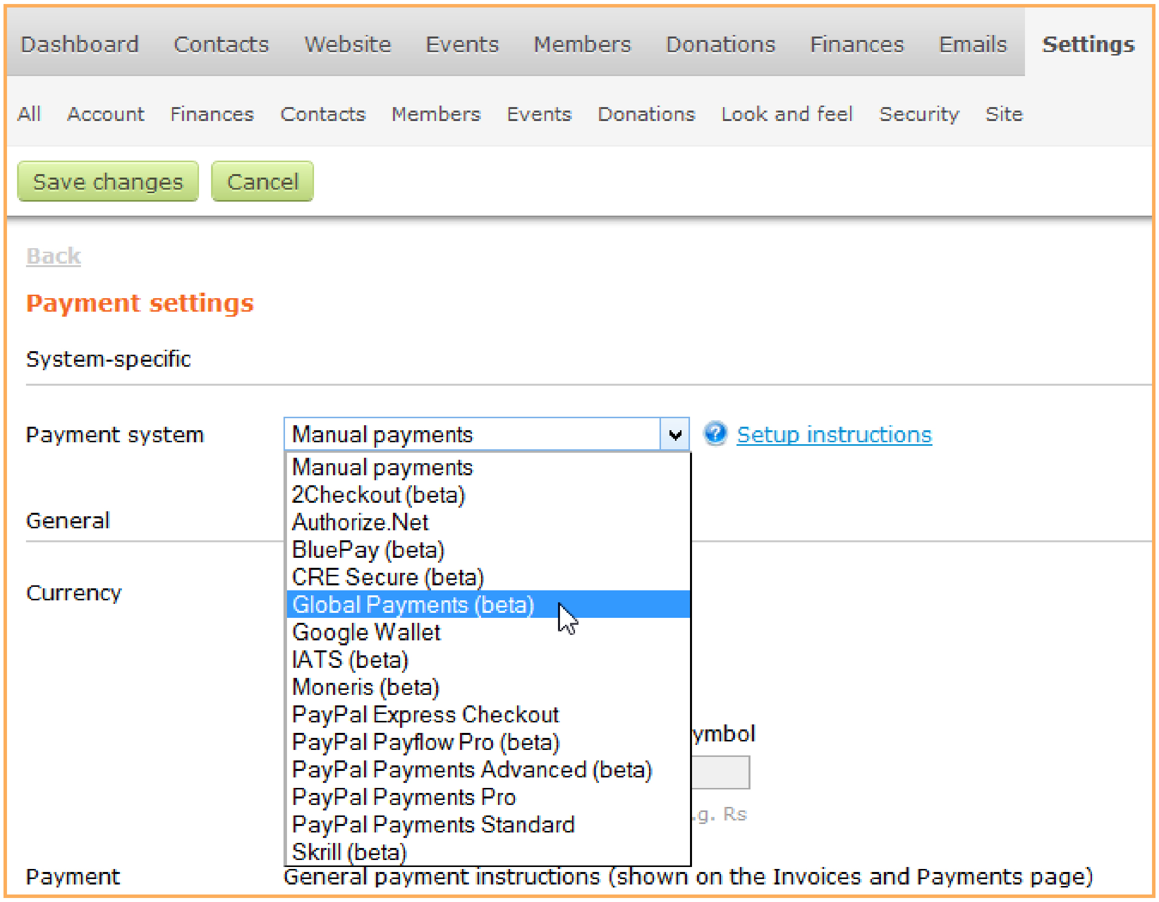


Payment settings for Global Payments

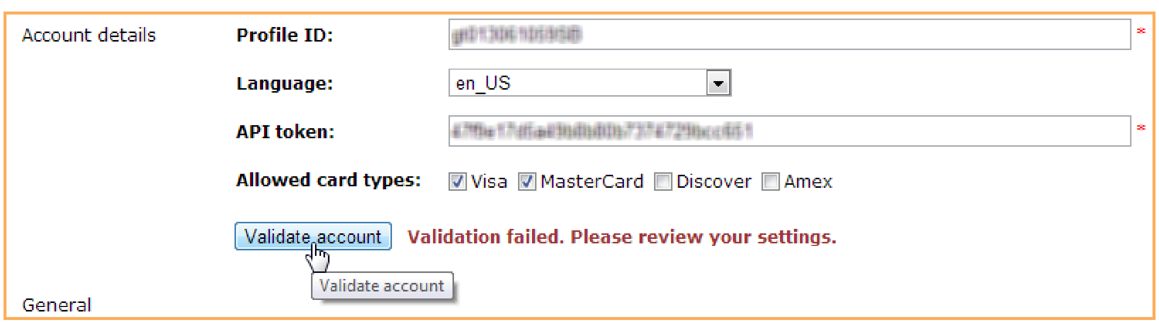
To integrate your Global Payments account into your Wild Apricot site, follow these steps:

Read more/less

1. Under the **Settings** menu, click **Finances**.
2. From the **Finances** settings screen, click **Payment settings**.
3. On the **Payment settings** screen, click the **Edit** button.
4. Click the **Payment system** drop-down list and select **Global Payments (beta)**.



5. If you want to begin accepting online payments immediately, click the **Live** radio button. If you want to test your settings using test or sandbox accounts provided by your payment provider, click the **Test/Sandbox** radio button. While in test mode, your payment provider will accept or decline your test transactions as it would live transactions, but will not charge any credit cards or update any bank accounts. Wild Apricot will, however, create payment records and update Wild Apricot balances as it would with live transactions. For more information, see Live vs. test/sandbox modes.
6. In the **Profile ID** field, enter your Global Transport profile ID.
7. Click the **Language** drop-down and select the language to be used on the payment screen.
8. Enter your account's **API token**.
9. Select the credit card types you want to accept. (These should match what you have set up in your Global Payments account.)
10. Click **Validate account** to make sure your account details are valid.



If the account validation fails, check to make sure you entered the account details properly.

11. Click the **Default country** drop-down list and select the country where the majority of your visitors reside. Your selection will appear as the default country to your customers.
12. Select the currency you want to use in your transactions.

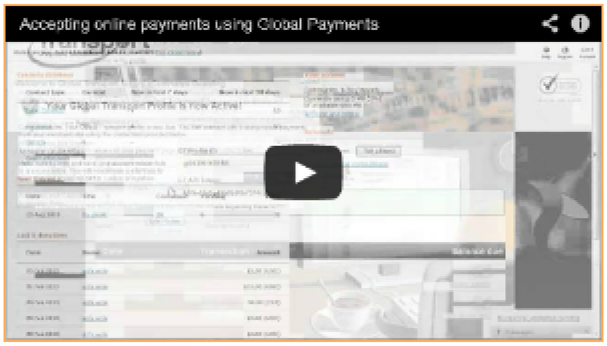
    Note: *Do not change the currency after your site begins accepting online payments. If you change the currency, existing payment records will not be recalculated and will no longer display correct amounts.*
13. In the **Instructions** fields, add payment instructions to be displayed to your customers.

14. Click **Save changes**.

Now that you have set up your Wild Apricot site to receive online payments, a **Pay online** button will appear after a visitor to your site clicks the **Confirm** button while applying for membership or registering for an event.

Recurring payments

Recurring payments are not supported by Global Payments.



Video: Integrating Global Payments (4:48)

On this page:

Expand all sections

See also:

- Online payments
- Payments overview

IATS

Accepting online payments using iATS Payments

iATS Payments provides an online payment processing service exclusively for non-profit organizations. Using iATS, you can accept online credit card payments on your Wild Apricot website. Before you can integrate your Wild Apricot site with iATS, you must have an iATS Payments account.

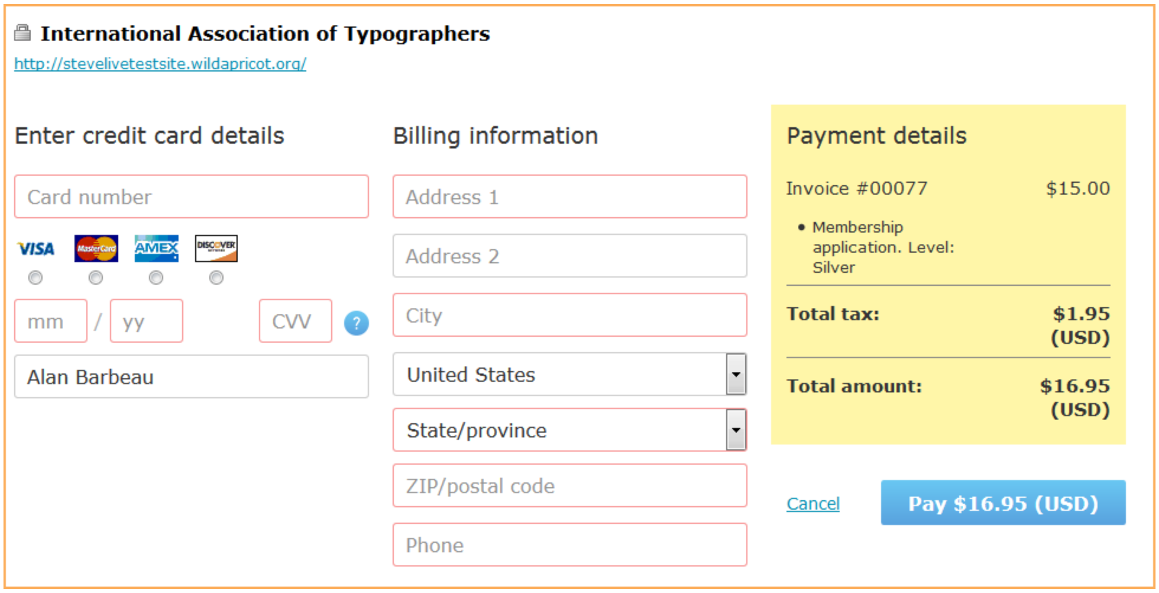
> Support for iATS is being provided without full testing in a live environment. During this initial implementation – the beta release – certain features such as recurring payments and automatic refunds will not be supported. For more information, see What does "beta" mean?.

Paying using iATS Payments

Once you've integrated your iATS Payments account with your Wild Apricot site, visitors to your site can pay online for membership fees and event registrations, and make donations.

Read more/less

When a visitor fills out an integrated online form on your Wild Apricot website (e.g. membership application or event registration) and chooses to pay online, they will be directed to a secure Wild Apricot payment form to make the payment.



On the form, they fill out their credit card details and their billing information, then click the **Pay** button to complete the payment.

After the payment is processed, the visitor is returned to the Invoices and payments tab on their member profile, where an invoice will appear, along with a payment entry, if the payment was successful.

> For security reasons, credit card information is not stored in Wild Apricot. Instead, it is securely transmitted to iATS where it is processed. iATS then returns the status of the payment transaction, which is recorded in your Wild Apricot transaction details.

Integrating your iATS Payments account with Wild Apricot

Before you can set up your Wild Apricot site to accept online payments through iATS, you must have an iATS Payments merchant account.

Read more/less

To qualify for an iATS Payments merchant account, your organization must be a registered nonprofit and will be required to provide the following documentation:

- Confirmation of your tax-exempt status with the IRS or CRA
- Verification of a bank account for deposits with a pre-printed void cheque
- Financial statements to confirm your current and past financial history

> If you want to test how your iATS account integrates with Wild Apricot, you can switch your iATS account to test mode within your iATS account settings.

What you need to get started

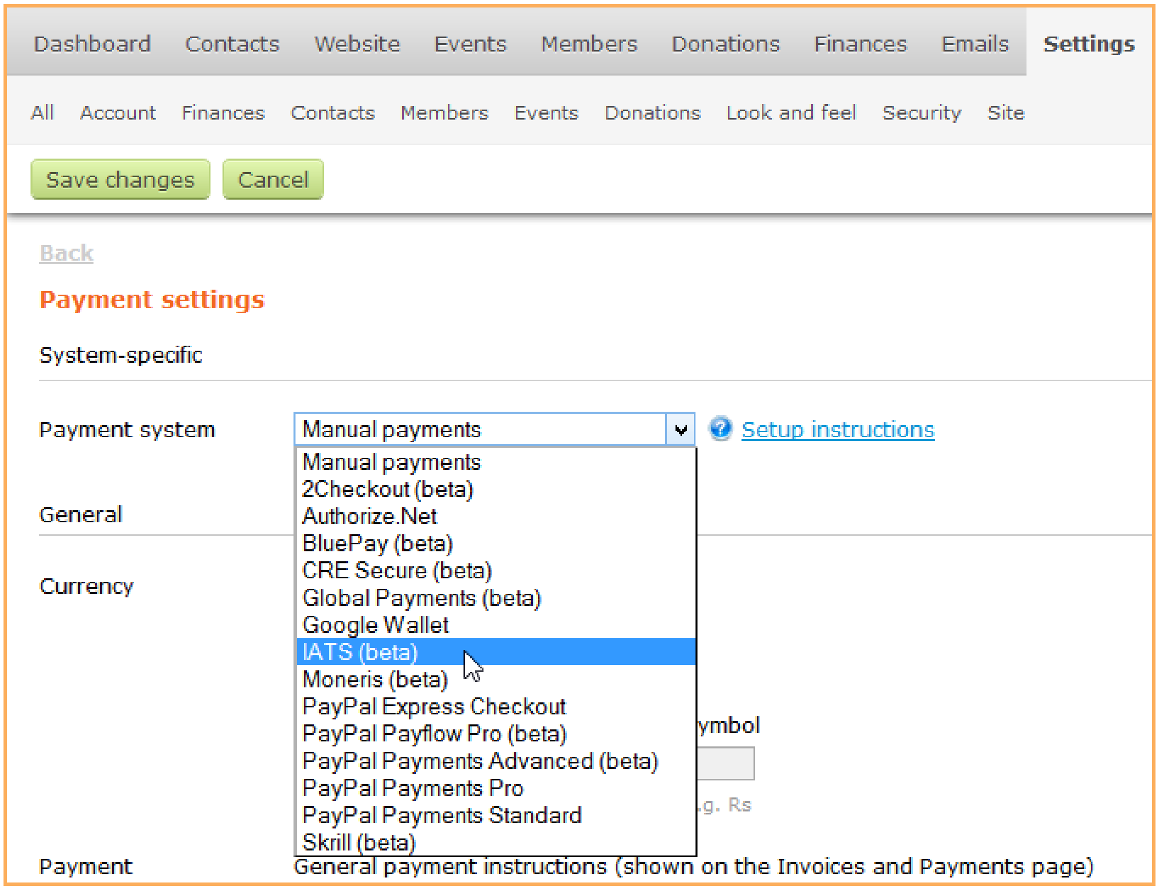
To integrate your iATS Payments account with Wild Apricot, you will need your client code and your password. Your client code and password are sent to you by iATS when your merchant account is activated.

Payment settings for iATS

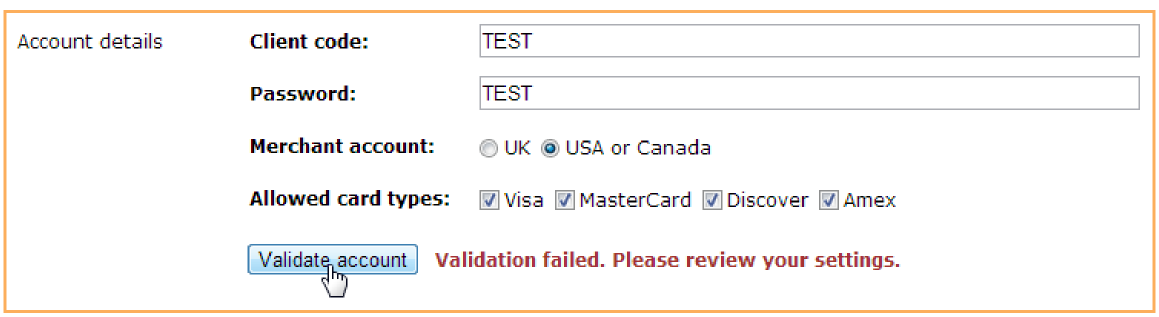
Once you have an iATS Payments account, follow these steps to integrate iATS into your Wild Apricot site:

Read more/less

1. Under the **Settings** menu, click **Finances**.
2. From the **Finances** settings screen, click **Payment settings**.
3. On the **Payment settings** screen, click the **Edit** button.
4. Click the **Payment system** drop-down list and select **iATS (beta)**.



5. In the **Client code** field, enter your iATS client code.
6. Enter your account password.
7. Indicate whether your merchant account is located in the USA, UK, or Canada.
8. Select the credit card types you want to accept. (These should match what you have set up in your iATS account.)
9. Click **Validate account** to make sure your iATS account details are valid.



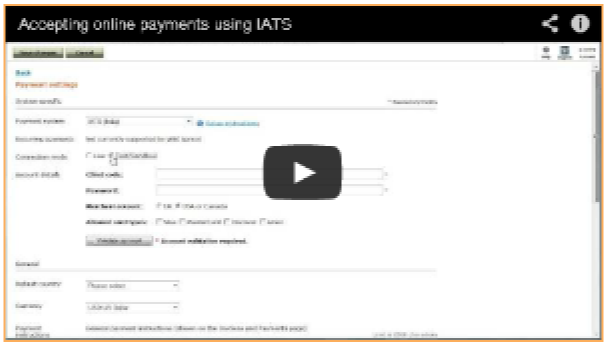
   If the account validation fails, check to make sure you entered the account details properly.
10. Click the **Default country** drop-down list and select the country where the majority of your visitors reside. Your selection will appear as the default country to your customers.
11. Select the currency you want to use in your transactions.

    Note: *Do not change the currency after your site begins accepting online payments. If you change the currency, existing payment records will not be recalculated and will no longer display correct amounts.*
12. In the **Instructions** fields, add payment instructions to be displayed to your customers.
13. Click **Save changes**.

Now that you have set up your Wild Apricot site to receive online payments, a **Pay online** button will appear after a visitor to your site clicks the **Confirm** button while applying for membership or registering for an event.

Recurring payments

Recurring payments are supported by iATS but are not supported by Wild Apricot during the initial implementation of this payment system.



Video: Integrating with iATS Payments (4:15)

On this page:

Expand all sections

See also:

- Online payments
- Payments overview

Moneris

Accepting online payments using Moneris (eSELECTplus)

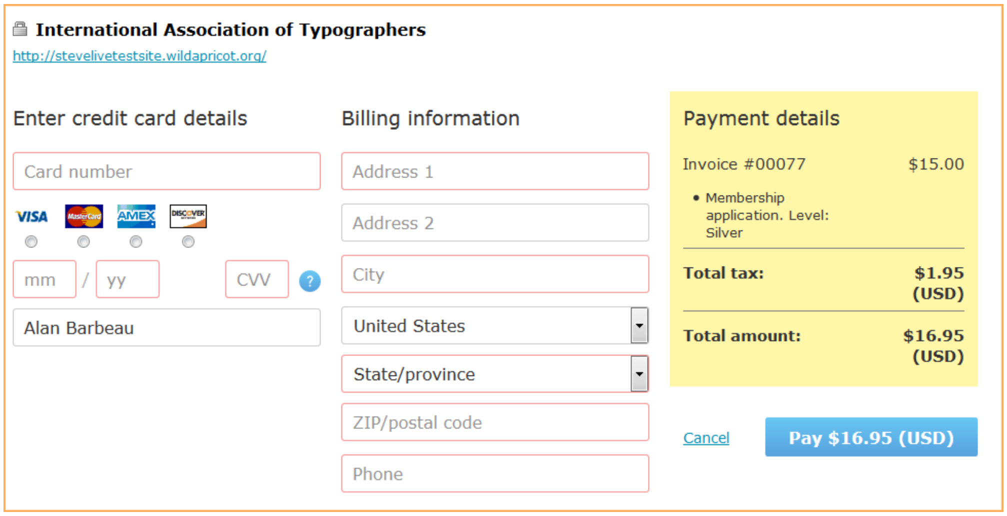
Moneris provides an online payment processing service called eSELECTplus that allows you to accept online credit card payments on your Wild Apricot website. Before you can integrate your Wild Apricot site with Moneris, you must have an eSELECTplus merchant account.

Paying using Moneris

Once you've integrated Moneris with your Wild Apricot site, visitors to your site can pay online for membership fees and event registrations, and make donations.

Read more/less

When a visitor fills out an integrated online form on your Wild Apricot website (e.g. membership application or event registration) and chooses to pay online, they will be directed to a secure Wild Apricot payment form to make the payment.



On the form, they fill out their credit card details and their billing information, then click the **Pay** button to complete the payment.

After the payment is processed, the visitor is returned to the Invoices and payments tab on their member profile, where an invoice will appear, along with a payment entry, if the payment was successful.

For security reasons, credit card information is not stored in Wild Apricot. Instead, it is securely transmitted to Moneris where it is processed. Moneris then returns the status of the payment transaction, which is recorded in your Wild Apricot transaction details.

Setting up your eSELECTplus account

Before you can set up your Wild Apricot site to accept online payments through Moneris, you must have an eSELECTplus merchant account.

While setting up your eSELECTplus account, be sure to activate the **eFraud** option. (For instructions on activating this option, contact Moneris directly.)

If you do not activate the **eFraud** option, you cannot successfully integrate your eSELECTplus account with your Wild Apricot site.

Recurring payments

If you want to set up recurring payments for membership fees, you must enable the Vault feature for your store.

Integrating your eSELECTplus account with Wild Apricot

Once you've set up your eSELECTplus account, you can integrate it into your Wild Apricot site.

What you need to get started

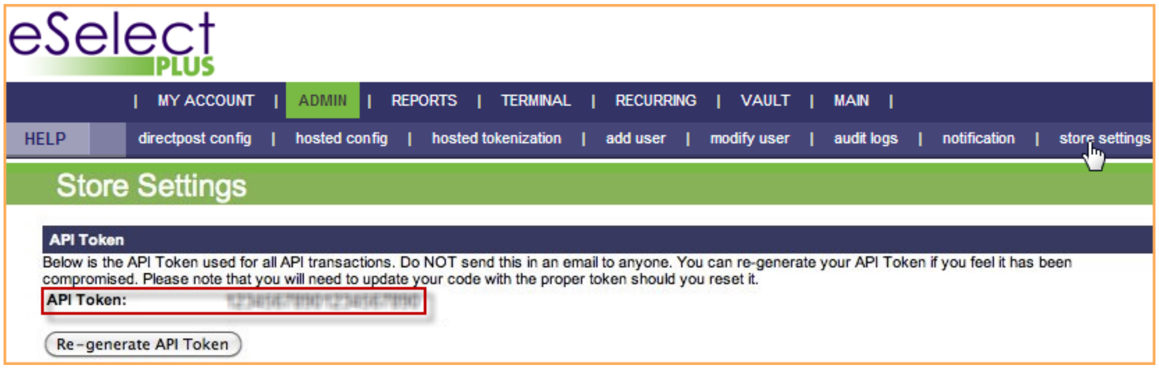
Instructions for third-party payment systems are provided as a courtesy and may contain out of date information or screen clips. For the latest instructions, consult the payment provider's website.

To integrate your eSELECTplus account with Wild Apricot, you will need your store ID and API token.

Read more/less

Your store ID is contained in the welcome message you received from Moneris, and is the same one you use to log into your Moneris administration panel.

To find your API token, log into your Moneris account, click the **Admin** tab then click **Store settings**. The 20-digit API token will appear – or can be generated – on this screen.

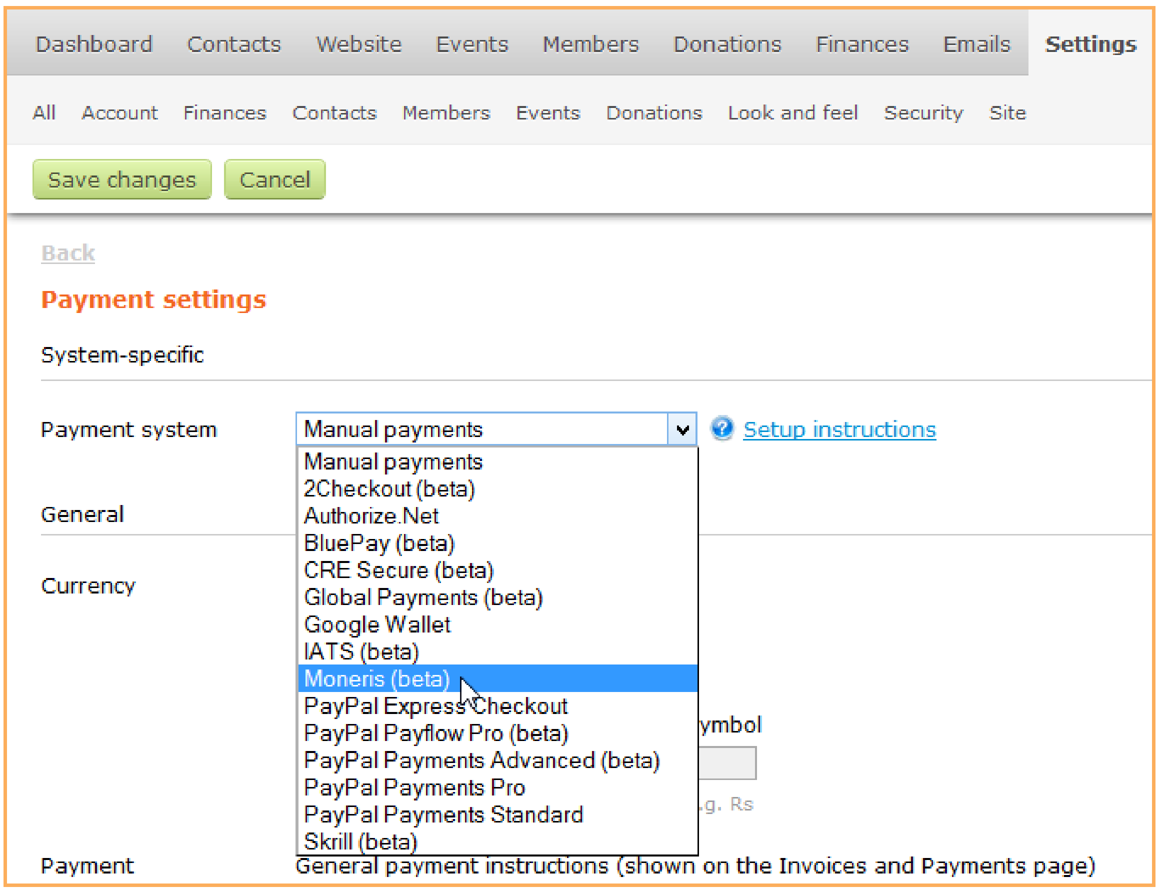


Payment settings for Moneris

Once you have an eSELECTplus account, follow these steps to integrate Moneris into your Wild Apricot site:

Read more/less

1. Under the **Settings** menu, click **Finances**.
2. From the **Finances** settings screen, click **Payment settings**.
3. On the **Payment settings** screen, click the **Edit** button.
4. Click the **Payment system** drop-down list and select **Moneris**.



5. If you want to begin accepting online payments immediately, click the **Live** radio button. If you want to test your settings using test or sandbox accounts provided by your payment provider, click the **Test/Sandbox** radio button. While in test mode, your payment provider will accept or decline your test transactions as it would live transactions, but will not charge any credit cards or update any bank accounts. Wild Apricot will, however, create payment records and update Wild Apricot balances as it would with live transactions. For more information, see Live vs. test/sandbox modes.
6. In the **Store ID** field, enter the store ID associated with your eSELECTplus account.
7. In the **API token** field, enter the API token that appears on the **Site settings** page in your eSELECTplus account.
8. Indicate whether your merchant account is located in the USA or Canada.

9. Select the credit card types you want to accept. (These should match what you have set up in your eSELECTplus account.)
10. Click the **Default country** drop-down list and select the country where the majority of your visitors reside. Your selection will appear as the default country to your customers.
11. Select the currency you want to use in your transactions.
__Note:__ Do not change the currency after your site begins accepting online payments. If you change the currency, existing payment records will not be recalculated and will no longer display correct amounts.
12. In the **Instructions** fields, add payment instructions to be displayed to your customers.
13. Click **Save changes**.

Now that you have set up your Wild Apricot site to receive online payments, a **Pay online** button will appear after a visitor to your site clicks the **Confirm and proceed with payment** button while applying for membership or registering for an event.

Video: Integrating Moneris (5:08)

On this page:

- Paying using Moneris
- Setting up your eSELECTplus account
- Recurring payments
- Integrating your eSELECTplus account with Wild Apricot
    - What you need to get started
    - Payment settings for Moneris

Expand all sections

See also:

- Recurring payments
- Online payments
- Payments overview

PayPal account setup

PayPal account setup

Instructions for third-party payment systems are provided as a courtesy and may contain out of date information or screen clips. For the latest instructions, consult the payment provider's website.

If you are using any of the following PayPal payment systems to accept online payments on Wild Apricot...

- PayPal Payments Standard
- PayPal Express Checkout
- PayPal Payments Pro

...we recommend you set up your PayPal account as instructed below. These instructions do **not** apply if you are using PayPal Payments Advanced or PayPal Payflow Pro to process online payments.

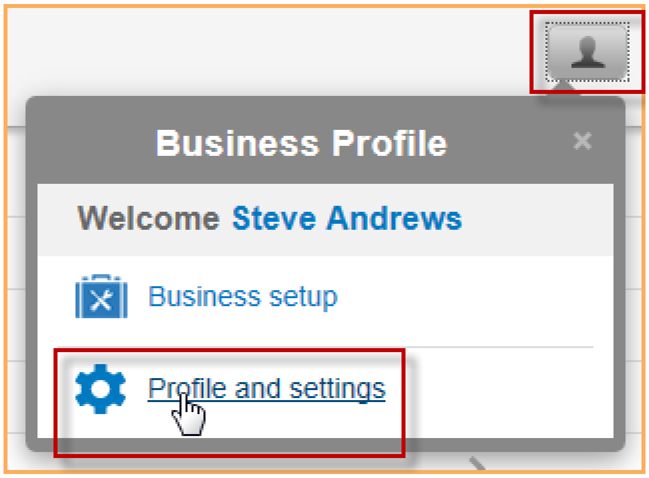
Set the language encoding

To avoid product names being incorrectly displayed by PayPal, you need to make sure the language encoding is properly set in your PayPal merchant account.

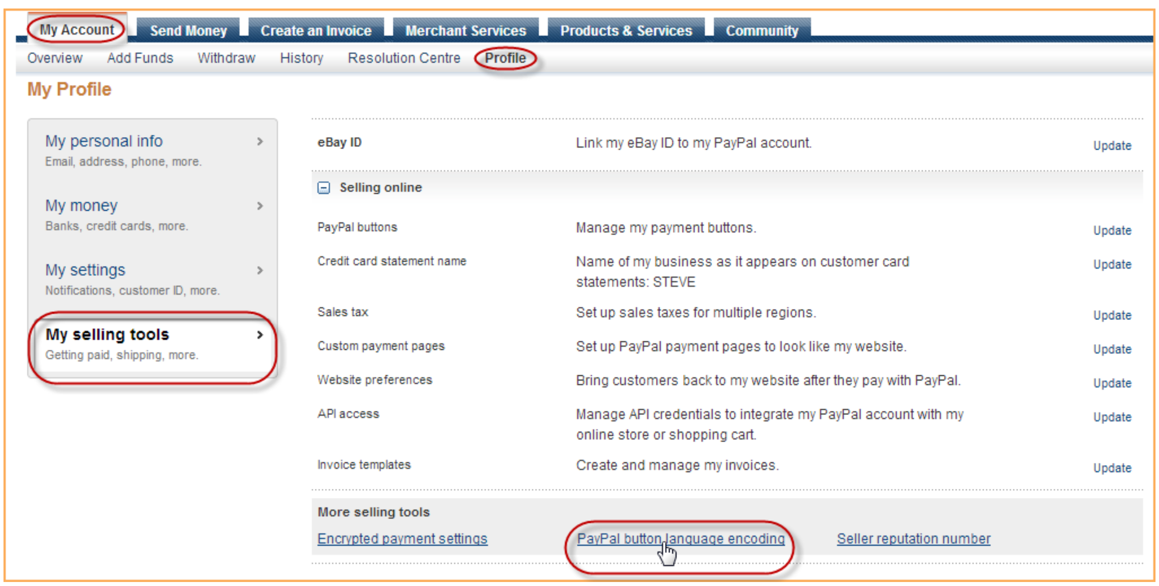
Read more/less

To set the language encoding, follow these steps:

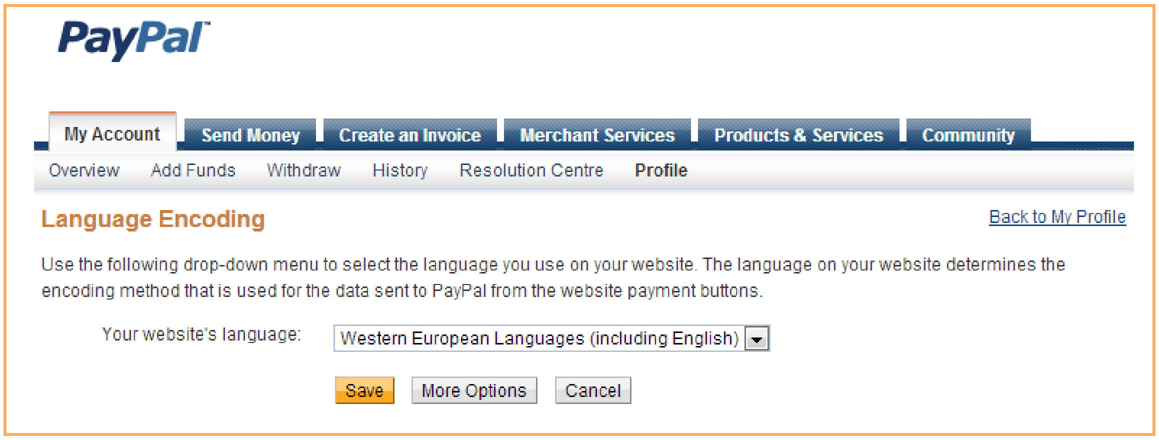
1. Go to the PayPal website and log into your PayPal account.
2. Click the Profile icon in the upper right corner of the PayPal screen.
3. Under **Business Profile**, click **Profile and settings**.



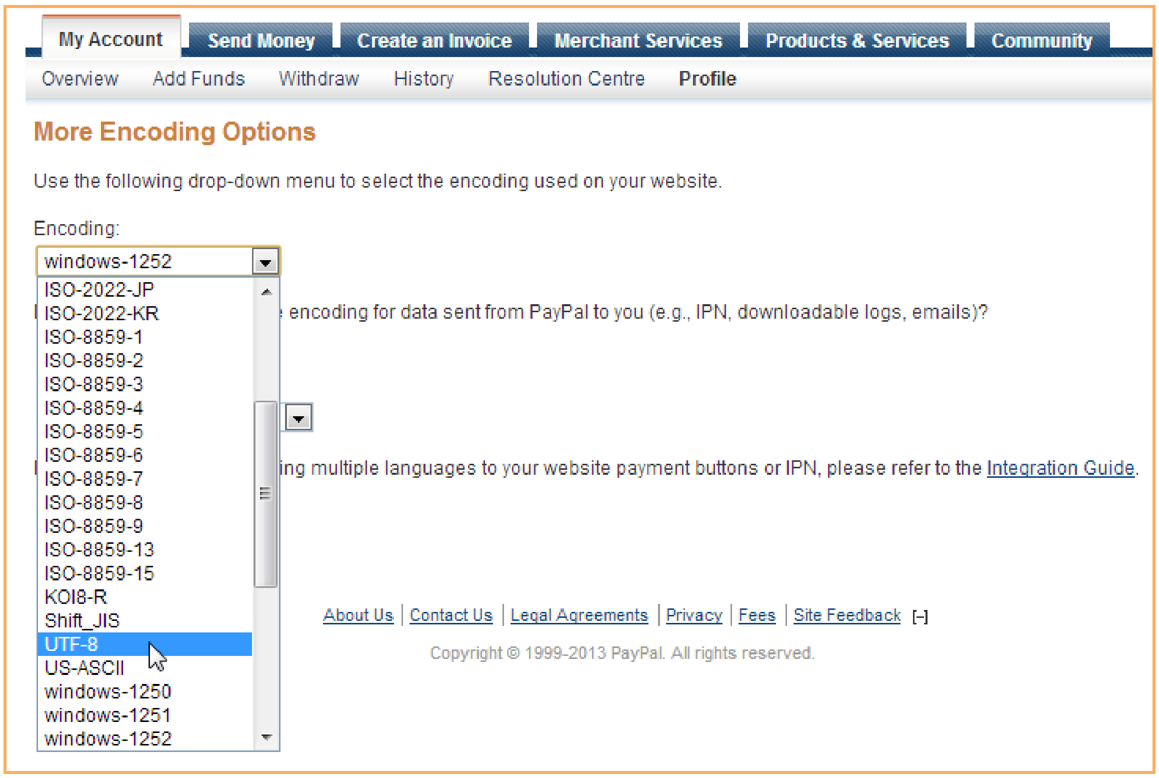
4. Within the My Profile screen, click **My selling tools** (on the left).
5. Click the **PayPal button language encoding** link at the bottom under **More selling tools**.



6. Ensure that the setting for **Your website's language** is correct.



7. Click the **More Options** button.
8. Clicking the **Encoding** drop down and select the **UTF-8** option.



9. Leave the **Do you want to use the same encoding for data sent from PayPal to you (e.g., IPN, downloadable logs, emails)?** option set to **Yes**.
10. Click the **Save** button.

Allow multiple payments per invoice ID

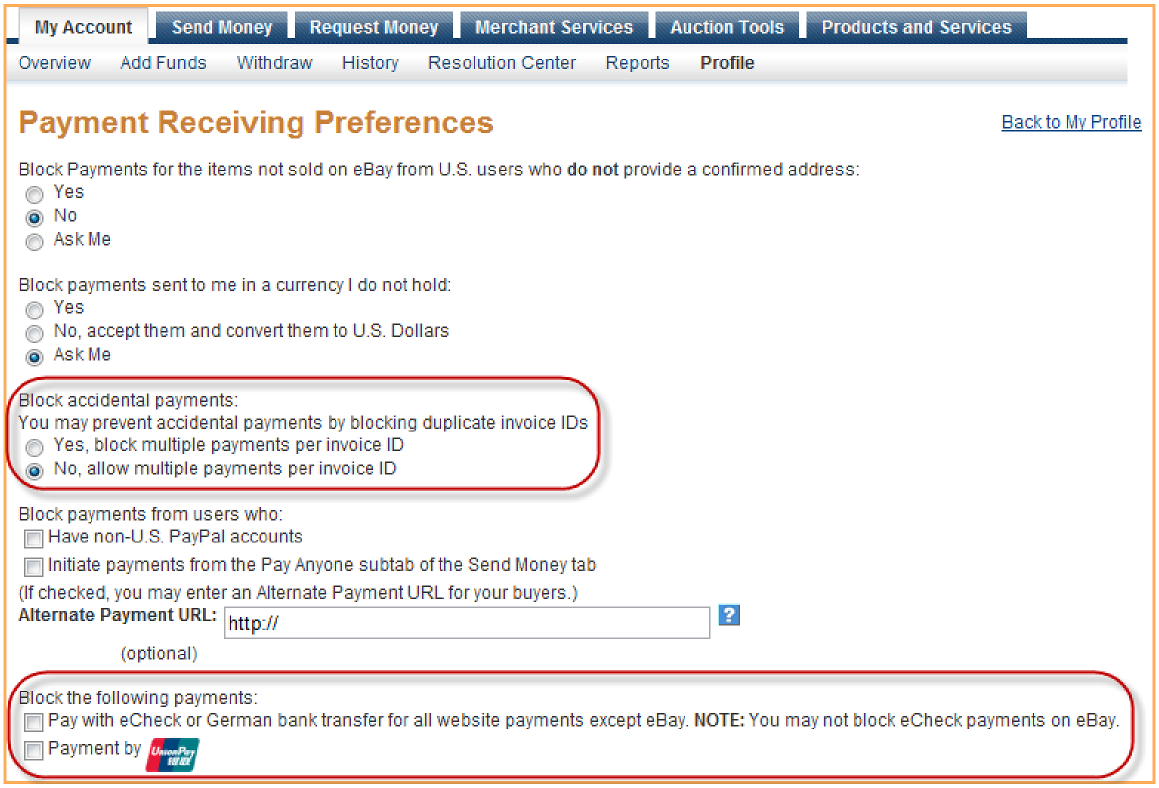
There are several cases in which you might want to enable multiple payments per invoice ID.

Read more/less

- Without this option enabled, any existing invoices that use the same invoice number as Wild Apricot invoices will generate an error.
- There are times when a member may need to pay the same invoice multiple times. After the invoice has already been paid through PayPal, the administrator can modify (increase) the original transaction / invoice amount to reflect new additions the member wants, e.g. the member forgot to include a t-shirt, guest registrations or simply registered for the wrong thing. If the member tries to pay the invoice balance online then PayPal might refuse the additional payment as a duplicate (same invoice ID).
- In rare cases, enabling this option is a necessary workaround for recurring payments to work with PayPal Payments Pro.

To turn this option on:

1. Click the Profile icon in the upper right corner of the PayPal screen.
2. Under **Business Profile**, click **Profile and settings**.
3. Click **My selling tools** .
4. Under **Getting paid and managing my risks**, click **Update** beside **Block payments**.
5. In the **Block accidental payments** section, select **No, allow multiple payments per invoice ID**.



6. Uncheck the **Pay with eCheck for website and SmartLogo payments** option. An eCheck is an electronic funds transfer that withdraws money directly from payer bank account. It can take up to nine business days for payments sent by eCheck to clear and the transaction will stay in Pending status during that whole time.

> With this option enabled, users might get double charged for the same transaction if PayPal is slow to respond and they click the **Pay** button a second time.

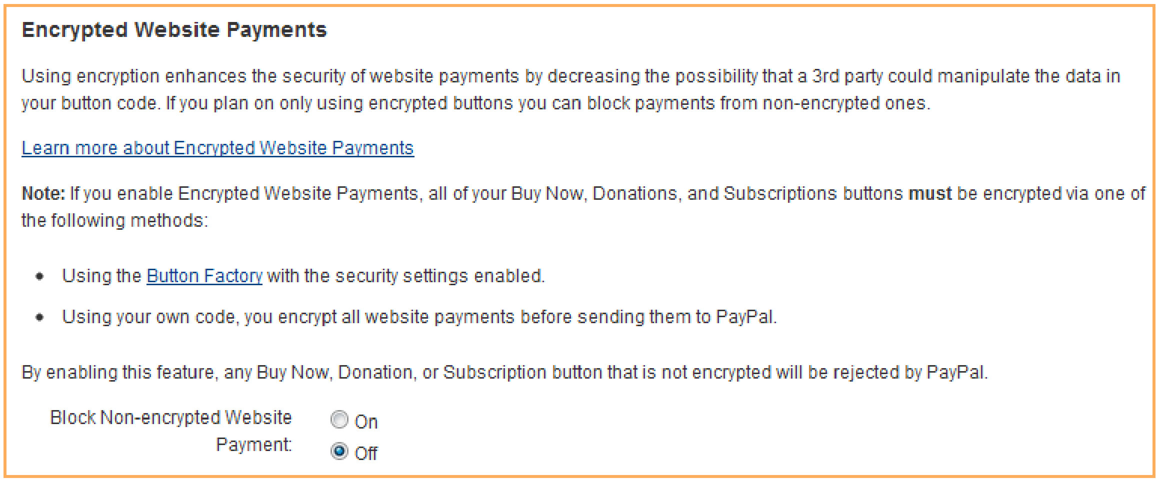
Turn off encrypted website payments

We recommend turning off the **Encrypted Website Payments** option as it might not properly work with Wild Apricot integration (don't worry, this would not affect the security of your account).

Read more/less

To turn off this option:

1. Click the Profile icon in the upper right corner of the PayPal screen.
2. Under **Business Profile**, click **Profile and settings**.
3. Click **My selling tools**.
4. Click **Update** beside **Website preferences** under **Selling Online**.
5. Under **Block Non-encrypted Website Payment**, select **Off**.



Enable IPN

IPN is PayPal's payment message service that sends a notification back to your Wild Apricot account (e.g. payment completed, failed, etc).

Read more/less

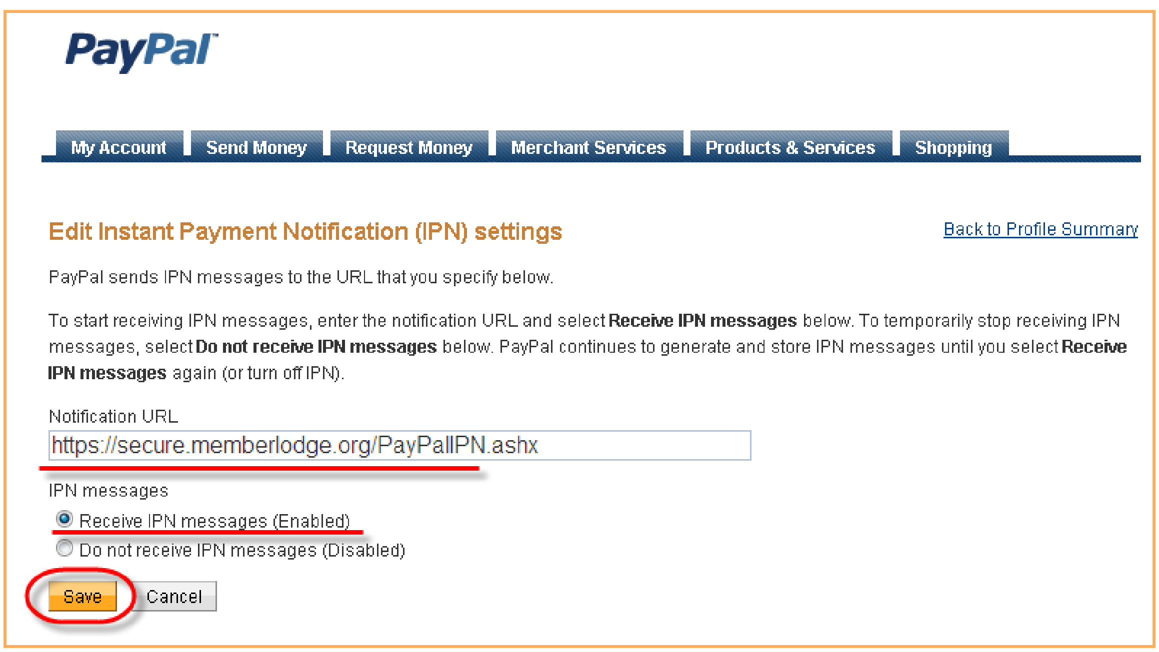
These messages will always be sent back to your account even if the user closes their browser before they are directed to a confirmation page.

To enable instant payment notification (IPN) in your PayPal account:

1. Click the Profile icon in the upper right corner of the PayPal screen.
2. Under **Business Profile**, click **Profile and settings**.
3. Click **My selling tools** .
4. Click **Update** beside **Instant payment notifications** under **Getting paid and managing my risks**.
5. Click the **Choose IPN settings** button.
6. Enter the following in the **Notification URL** field:

```
https://secure.memberlodge.org/PayPalIPN.ashx
```

7. Click **Receive IPN messages (Enabled)**.



8. Click **Save**.

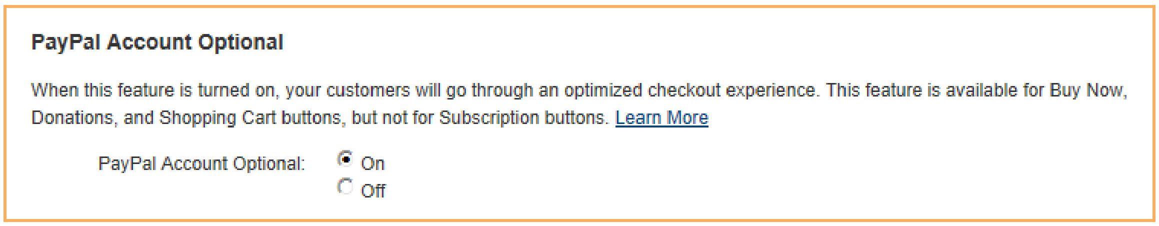
Enabling/disabling credit card payments

Within your PayPal account, you can control whether credit card payments can be accepted for PayPal Express Checkout, PayPal Payments Standard, and the Express Checkout option within PayPal Payments Pro.

Read more/less

To enable or disable credit card payments, follow these steps:

1. Click the Profile icon in the upper right corner of the PayPal screen.
2. Under **Business Profile**, click **Profile and settings**.
3. Click **My selling tools**.
4. Click **Update** beside **Website preferences** under **Selling Online**.
5. Under **PayPal Account Optional**, set the option to **On** to enable credit card payments or to **Off** to disable them.



6. Click **Save**.

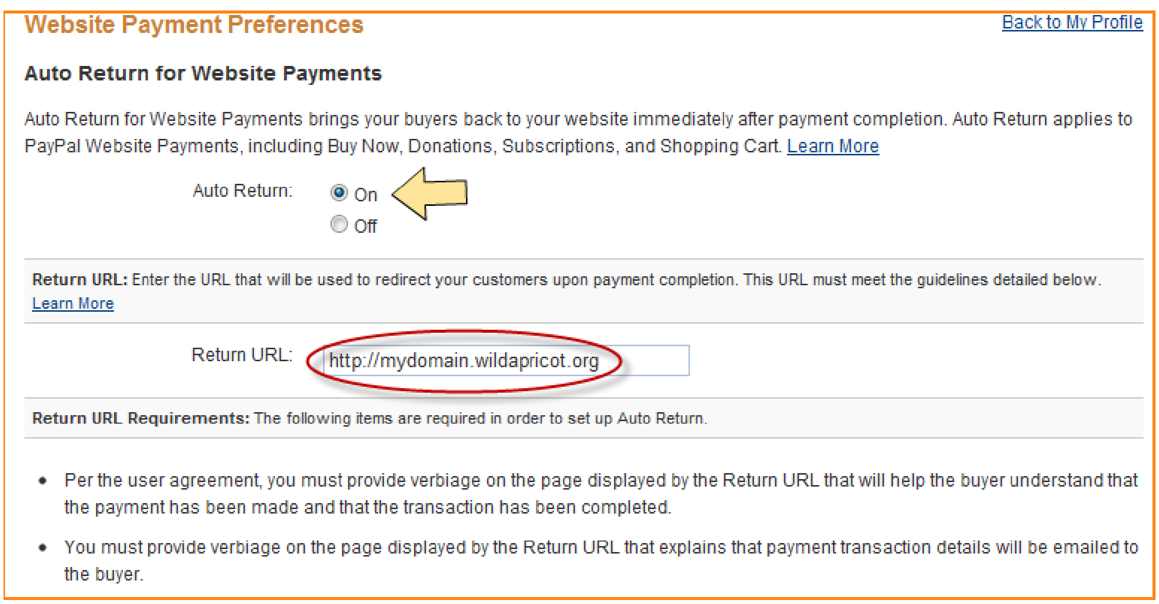
Set up PDT (PayPal Payments Standard only)

When you set up Wild Apricot to work with PayPal Payments Standard, you need to enter your PDT token. PDT (Payment Data Transfer) is a secure method to retrieve the details about a PayPal transaction so that you can display them to your customer.

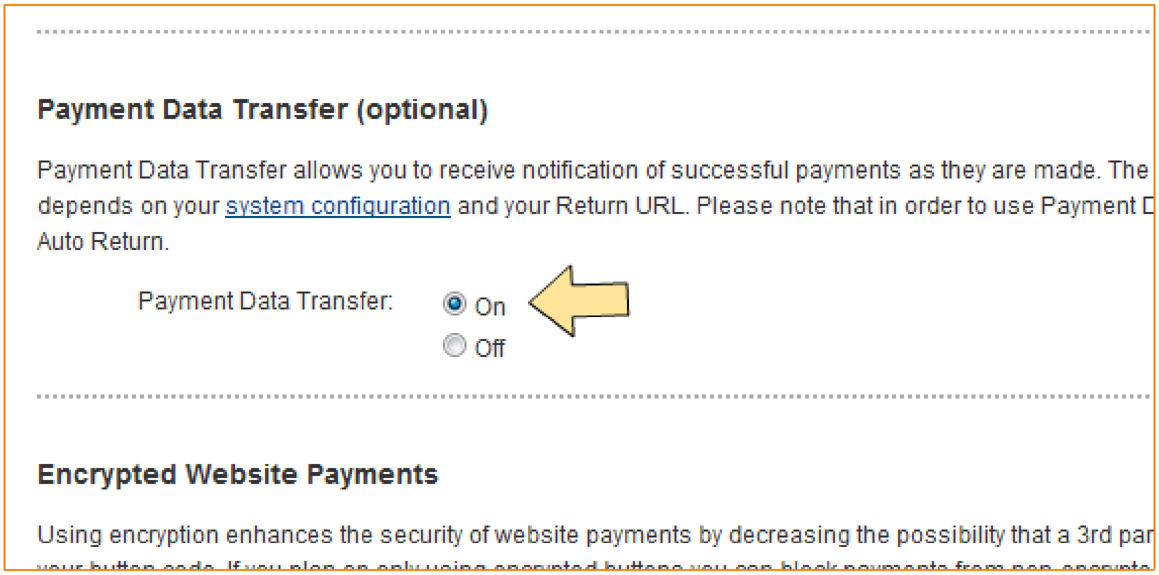
Read more/less

To set PDT in your PayPal account:

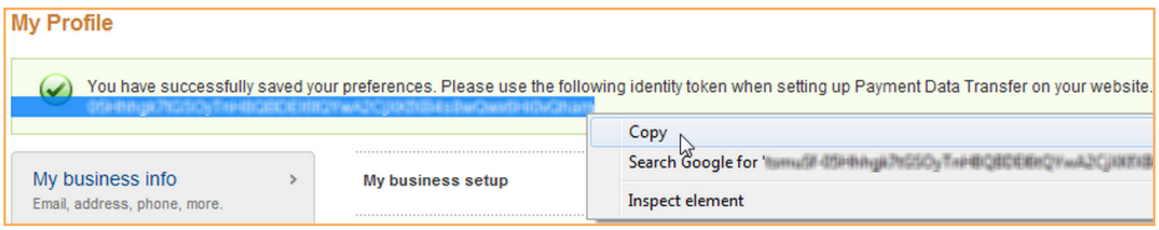
1. Click the Profile icon in the upper right corner of the PayPal screen.
2. Under **Business Profile**, click **Profile and settings**.
3. Click **My selling tools**.
4. Click **Update** beside **Website preferences** under **Selling Online**.
5. Under **Auto Return for Website Payments**, enable auto return for payments by switching the option to **On** from **Off**.
6. Enter your Wild Apricot site URL in the **Return URL** field (e.g. http://mydomain.wildapricot.org).



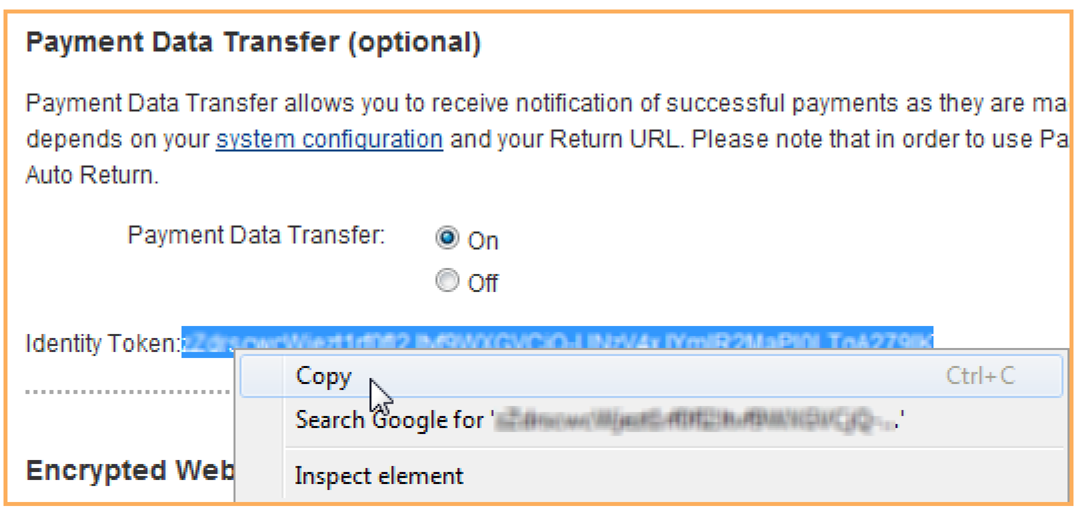
7. Then scroll down to the **Payment Data Transfer** section and also switch this option to **On**.



8. Click **Save**.
9. The PDT token is now displayed on your profile screen. You can copy the token, then go into your Wild Apricot account under **Settings > Finances > Payment settings**, and paste it in the **PDT token** field.



To view your PDT token at a later date, return to the Payment Data Transfer section on the Website Payment Preferences screen.



Resending IPN Messages

Sometimes payments can successfully go through in PayPal but due to some glitch they are not automatically recorded in Wild Apricot. In this case, re-sending the IPN messages from within your PayPal account can help.

Read more/less

To resend the IPN messages, follow these steps:

1. Go to the PayPal website and log in to your account.
2. Click the Profile icon in the upper right corner of the PayPal screen.

3. Under **Business Profile**, click **Profile and settings**.
4. Within the My Profile screen, click **My selling tools** (on the left).
5. Click **Update** beside **Instant payment notifications** under **Getting paid and managing my risks** .
6. Click the **IPN History page** link.
7. Select the IPNs to be resent.
8. Click the **Resend Selected** button.

> ⚠ Only sent and failed IPNs can be resent.

On this page:

- Set the language encoding
- Allow multiple payments per invoice ID
- Turn off encrypted website payments
- Enable IPN
- Enabling/disabling credit card payments
- Set up PDT (PayPal Payments Standard only)
- Resending IPN Messages

Expand all sections

PayPal Express Checkout

Accepting online payments using PayPal Express Checkout

PayPal Express Checkout is a payment method you can use to accept online credit card payments on your website. You can use it for one-time payments or recurring payments .

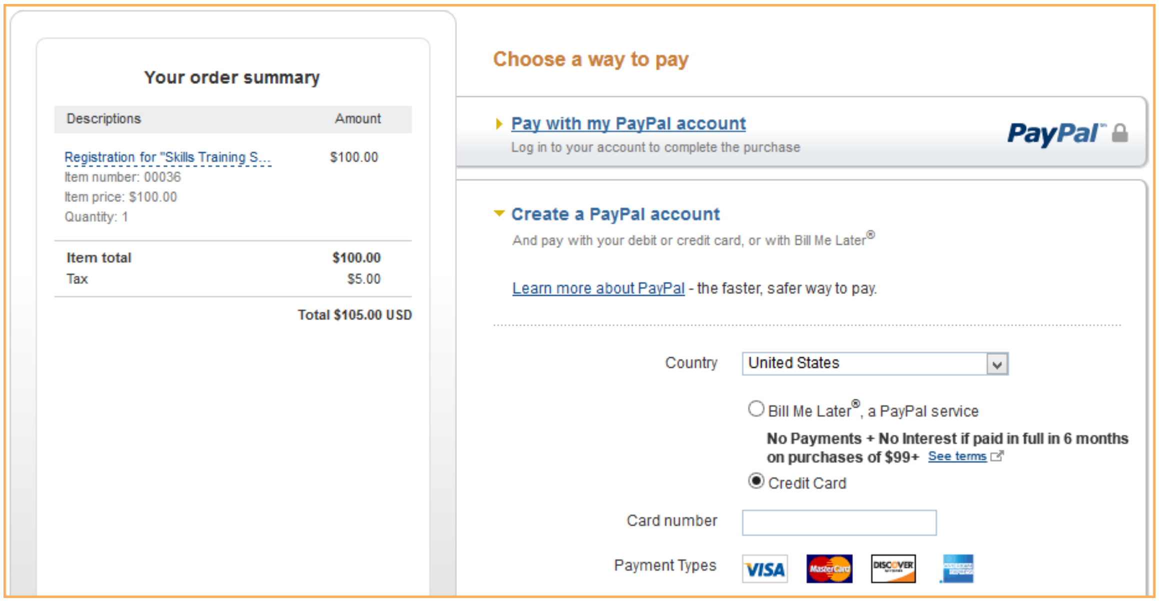
Before you can set up your Wild Apricot site to work with PayPal Express Checkout, you must set up an account with PayPal.

Paying using PayPal Express Checkout

Once you've integrated your PayPal account with your Wild Apricot site, visitors to your site can pay online for membership fees and event registrations, and make donations.

Read more/less

When a visitor fills out an integrated online form on your Wild Apricot website (e.g. membership application or event registration) and chooses to pay online, they will be redirected to PayPal's site where they can use their PayPal account or their credit or debit card to make the payment.



Membership applicants for levels with recurring payments must use their PayPal account.

From here, they can log into their PayPal account or enter their credit card or debit card details. Then they will be returned to the Wild Apricot site, where they can confirm and complete the purchase.

For information about the transaction – including transaction ID and status – check your PayPal account's IPN (Instant Payment Notification) history. To view your IPN history, go to PayPal, click **My Account**, then under **History** select **IPN History**.

Integrating your PayPal account with Wild Apricot

Instructions for third-party payment systems are provided as a courtesy and may contain out of date information or screen clips. For the latest instructions, consult the payment provider's website.

To accept online payments using PayPal Express Checkout, you must have a Business or Premier PayPal account. See PayPal account setup for recommended account settings.

Recurring payments

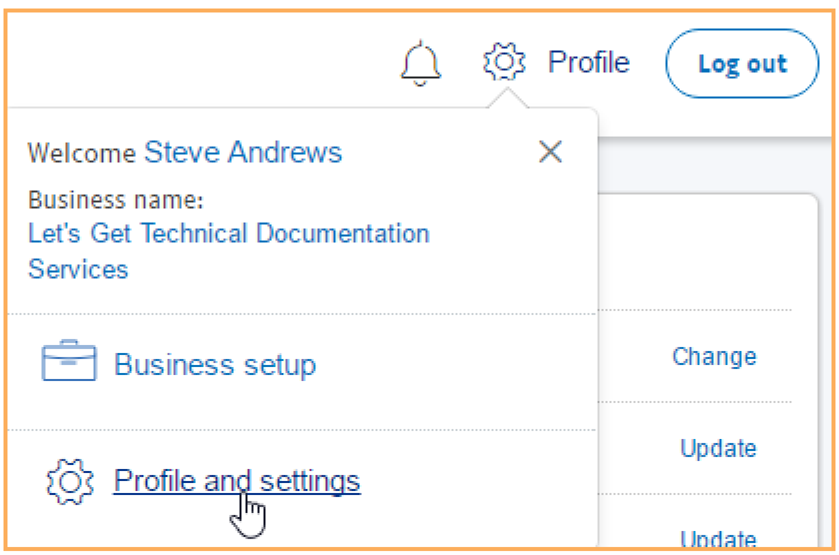
If you want to set up recurring payments for membership fees, you must enable instant payment notification (IPN) in your PayPal account. For instructions on enabling IPN, see Recurring payments.

What you need to get started

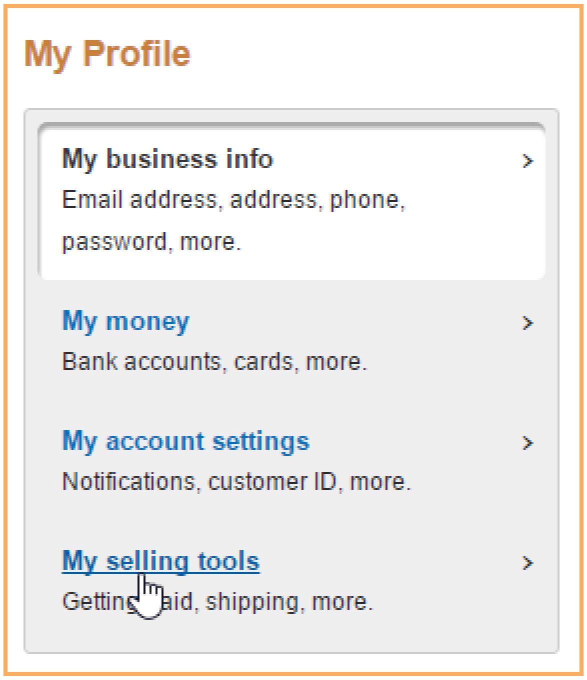
To integrate your PayPal account with Wild Apricot, you will need your PayPal account ID (your email address), your API username, your API password, and your API signature. To view or request your API credentials, follow these steps:

Read more/less

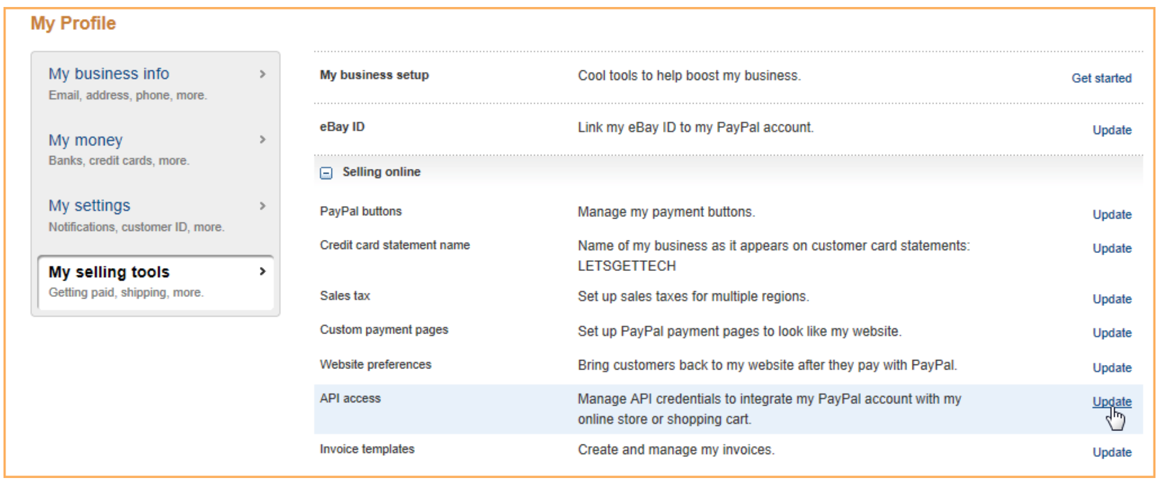
1. Log into your PayPal account.
2. Click the **Profile** option, then Profile and settings.



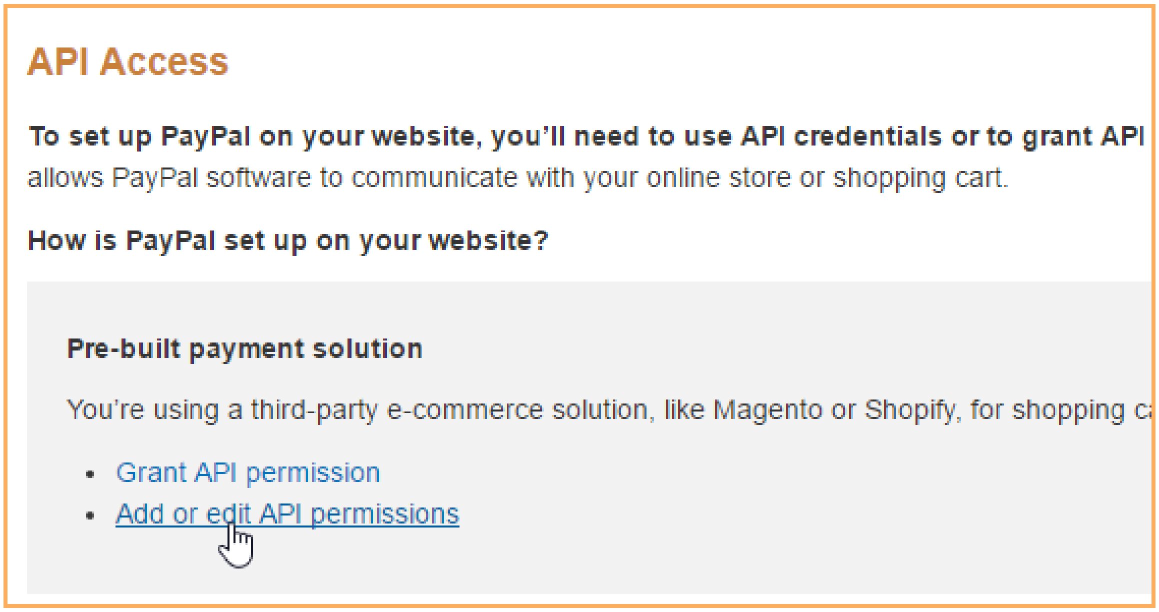
3. Click **My selling tools**.



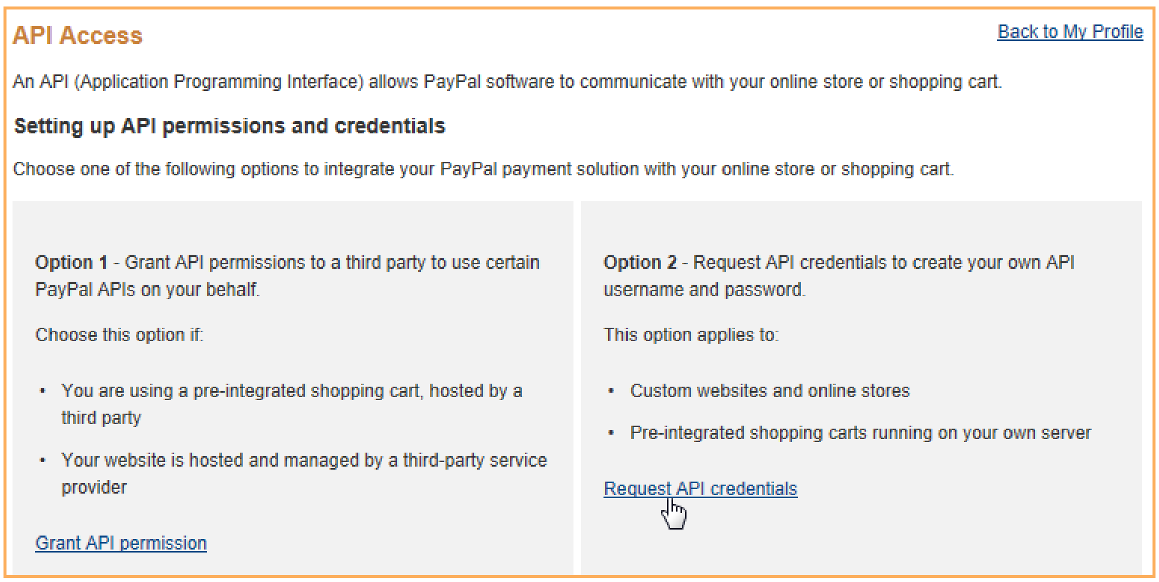
4. Click **Update** beside **API Access** under **Selling online**.



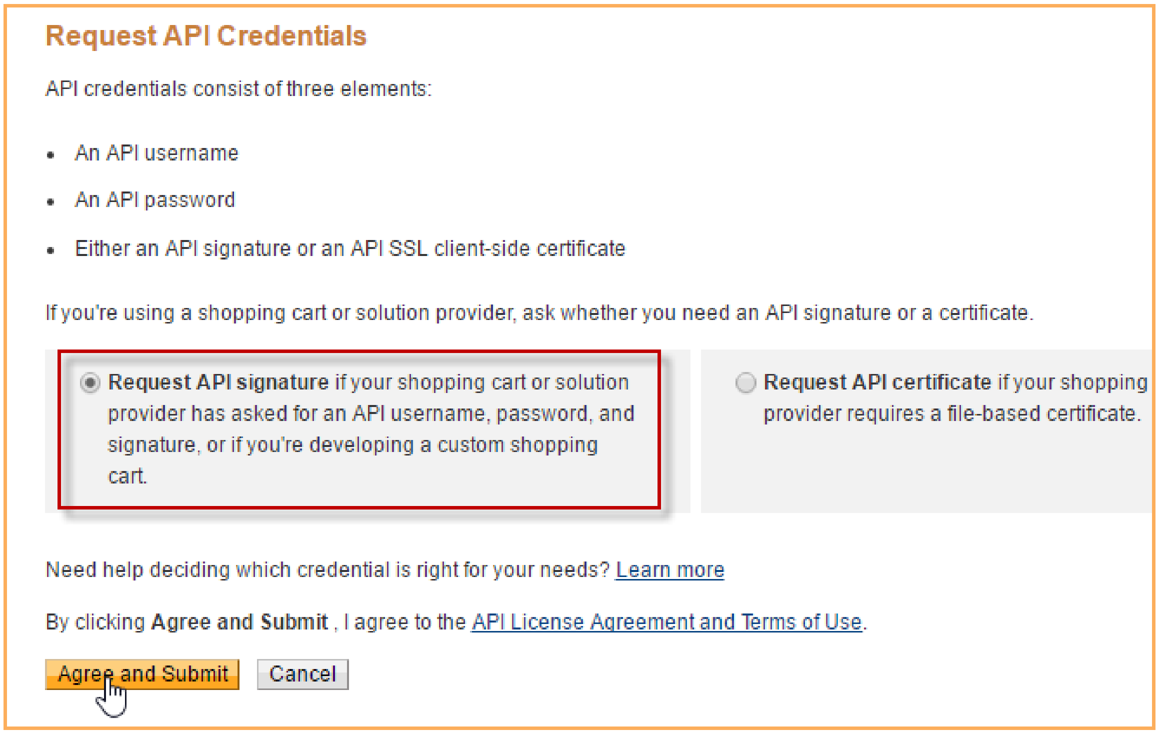
5. From the API Access screen, click the **Add or edit API permissions** link.



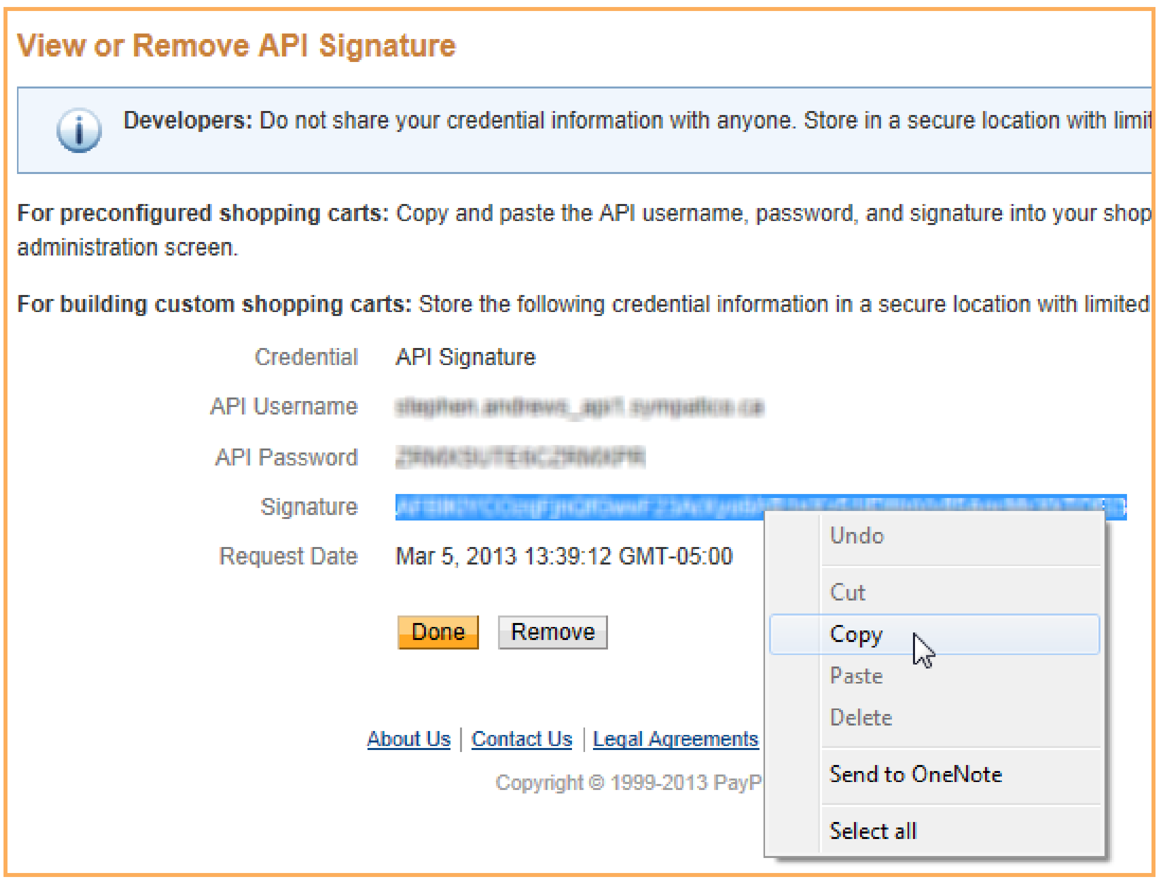
6. If you haven't requested API credentials before, click the **Request API credentials** link. If you have previously requested API credentials, click **View API signature**.



7. If you haven't requested your API credentials before, make sure the **Request API signature** option is selected then click the **Agr ee and Submit** button. (This step doesn't occur if you are asking to view previously requested credentials.)



8. The details of your API signature now appears. You can copy them and paste them into your Wild Apricot settings.

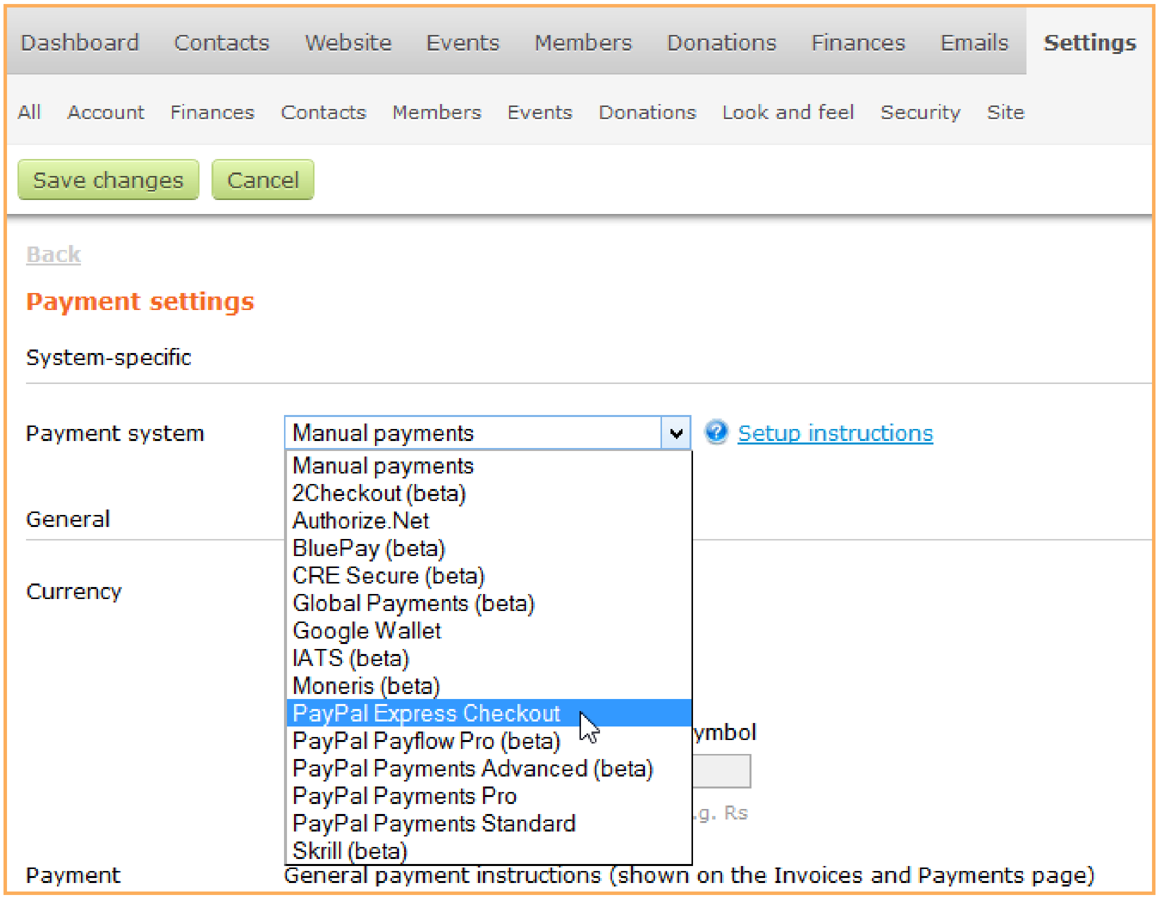


Payment settings for PayPal Express Checkout

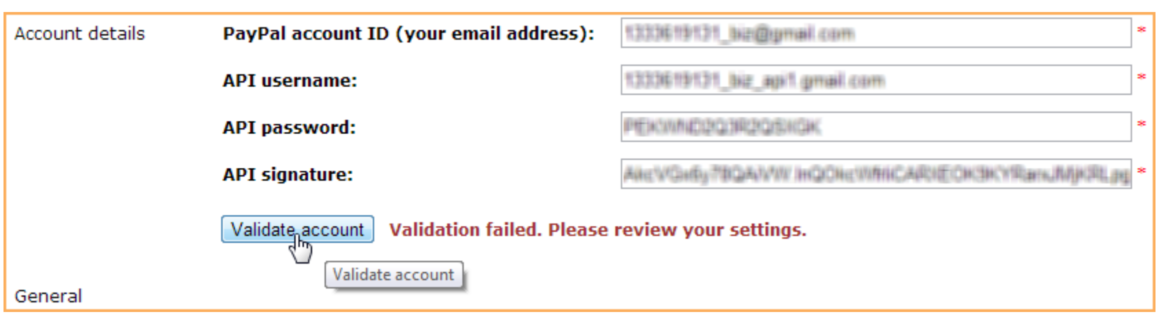
Once you have set up your PayPal account, follow these steps to integrate it with your Wild Apricot site:

Read more/less

1. Under the **Settings** menu, click **Finances**.
2. From the **Finances** settings screen, click **Payment settings**.
3. On the **Payment settings** screen, click the **Edit** button.
4. Click the **Payment system** drop-down list and select **PayPal Express Checkout**.



5. If you want to begin accepting online payments immediately, click the **Live** radio button. If you want to test your settings using test or sandbox accounts provided by PayPal, click the **Test/Sandbox** radio button. While in test mode, your payment provider will accept or decline your test transactions as it would live transactions, but will not charge any credit cards or update any bank accounts. Wild Apricot will, however, create payment records and update Wild Apricot balances as it would with live transactions. For more information, see Live vs. test/sandbox modes.
6. Enter your **PayPal account ID** (your email address).
7. Enter your **API username**, **API password**, and **API signature**.
8. Select the credit card types you want to accept. (These should match what you have set up in your PayPal account.)
9. Click **Validate account** to make sure your PayPal Express Checkout account details are valid.



If the account validation fails, check to make sure you entered the account details properly.

10. Select the default country you want to display to the customers for online payments.
11. Select the currency you want to use in your transactions. (This should match your PayPal account.)

Note: Do not change the currency after your site begins accepting online payments. If you change the currency, existing payment records will not be recalculated and will no longer display correct amounts.

12. Add payment instructions to be displayed to the customer.
13. Click **Save changes**.

Now that you have set up your Wild Apricot site to receive online payments, a **Pay online** button will appear after a visitor to your site clicks the **Confirm** button while applying for membership or registering for an event.

Troubleshooting

If you encounter problems using PayPal Express Checkout to process transactions on your Wild Apricot site, check the following:

- Contact PayPal to see if there are any issues with your PayPal account (you may have missed some payments, for example).
- Check your Wild Apricot audit log for transaction errors and compare them to the list of PayPal error codes.

Video: Integrating PayPal Express Checkout (6:27)

On this page:

Expand all sections

See also:

- PayPal account setup
- Online payments
- Payments overview
- Recurring payments

PayPal Payflow Pro

Accepting online payments using PayPal Payflow Pro

Payflow Pro is a payment gateway that allows you to accept online credit card payments on your Wild Apricot website. You can use it for one-time payments or recurring payments . Before you can set up your Wild Apricot site to work with PayPal Payflow Pro, you must set up an account with PayPal.

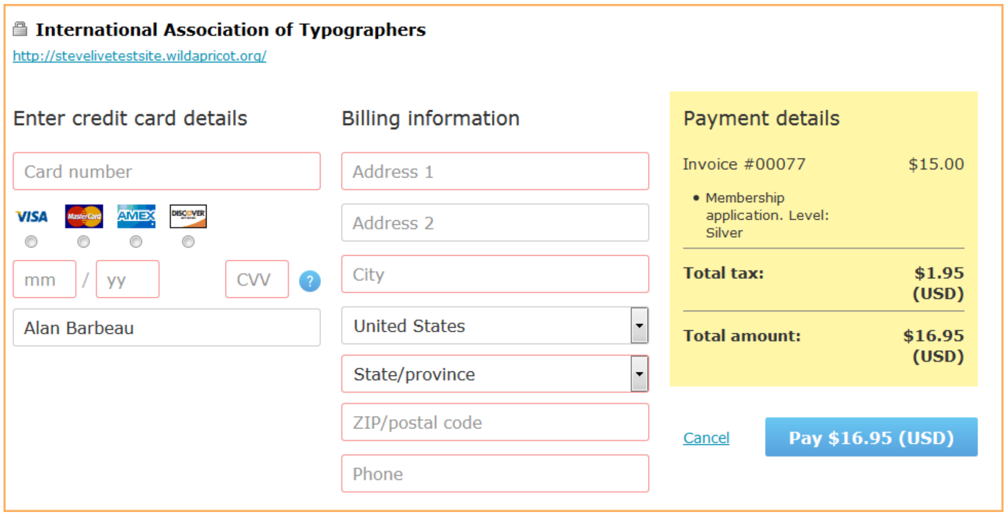
> Support for PayPal Payflow Pro is being provided without full testing in a live environment. During this initial implementation – the beta release – certain features such as automatic refunds will not be supported. Support for recurring payments is being provided. For more information, see What does "beta" mean?

Paying using PayPal Payflow Pro

Once you've integrated PayPal Payflow Pro with your Wild Apricot site, visitors to your site can pay online for membership fees and event registrations, and make donations.

Read more/less

When a visitor fills out an integrated online form on your Wild Apricot website (e.g. membership application or event registration) and chooses to pay online, they will be directed to a secure Wild Apricot payment form to make the payment.



On the form, they fill out their credit card details and their billing information, then click the **Pay** button to complete the payment.

After the payment is processed, the visitor is returned to the Invoices and payments tab on their member profile, where an invoice will appear, along with a payment entry, if the payment was successful.

For security reasons, credit card information is not stored in Wild Apricot. Instead, it is securely transmitted to PayPal where it is processed. PayPal then returns the status of the payment transaction, which is recorded in your Wild Apricot transaction details.

Integrating your PayPal Payflow Pro account with Wild Apricot

Instructions for third-party payment systems are provided as a courtesy and may contain out of date information or screen clips. For the latest instructions, consult the payment provider's website.

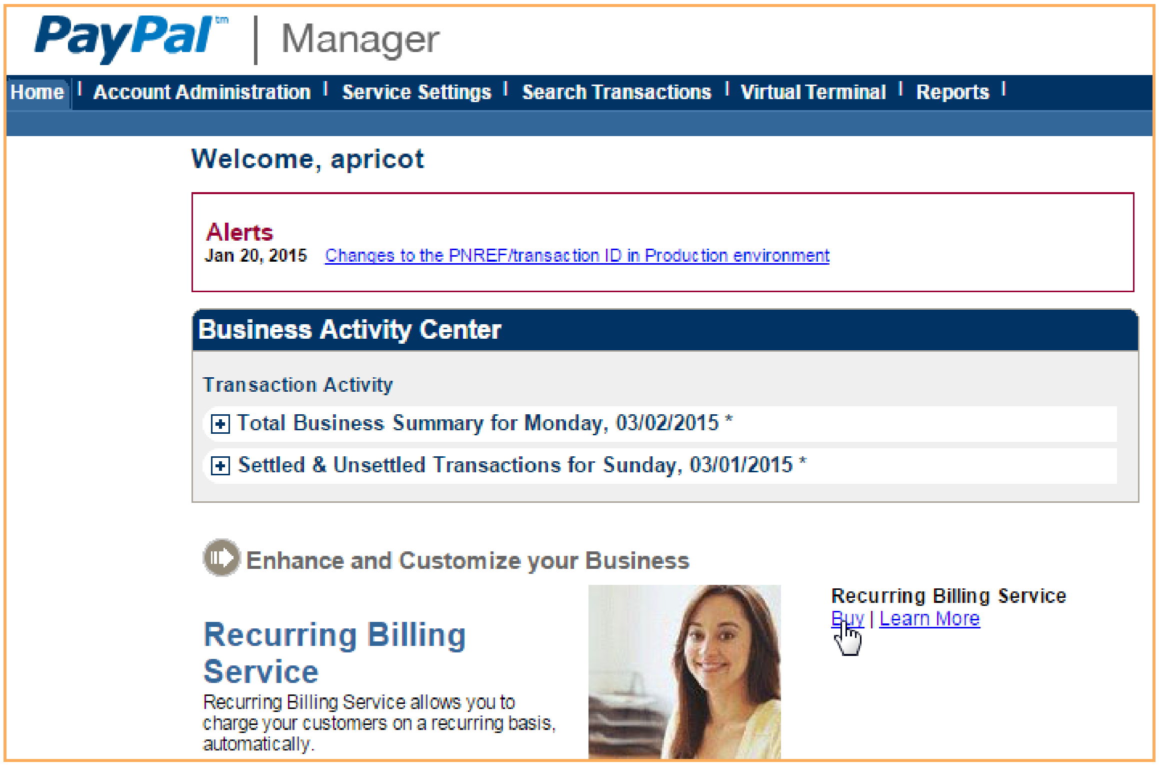
Before you can set up your Wild Apricot site to accept online payments through PayPal Payflow Pro, you must have a PayPal Payflow Pro account. To create a PayPal Payflow Pro account, click here. Once you've set up your PayPal account, you can integrate it into your Wild Apricot site.

Other Wild Apricot administrators with full access privileges will be able to see your payment account credentials, so you might consider limiting administrative privileges accordingly. For example, you could grant full privileges until site setup is complete then remove or restrict the administrator privileges before setting up online payments.

Recurring payments

PayPal Payflow Pro supports recurring payments as a specialized add-on, available at an additional cost. If you want to set up recurring payments on your Wild Apricot site using PayPal Payflow Pro, you must sign up for the Recurring Billing Service.

Read more/less



Once you've set up your PayPal account and Wild Apricot account to support recurring payments, you can test your settings.

What you need to get started

To integrate your PayPal Payflow Pro account with Wild Apricot, you'll need the following information:

Read more/less

Field	Description
Partner	The ID provided to you by the authorized PayPal reseller who registered you for Payflow Pro. If you purchased your account directly from PayPal, use *PayPal*.
Merchant Login	Your merchant login ID that you created when you registered for the account.

<table>
<tr><td>User</td><td>If you have set up multiple users on your account, you'll need the ID of the user authorized to process transactions. If you haven't set up additional users on the account, then enter your merchant ID as the user. To manage users on your account, go to your PayPal account and click the Manage Users tab under Account Administration.

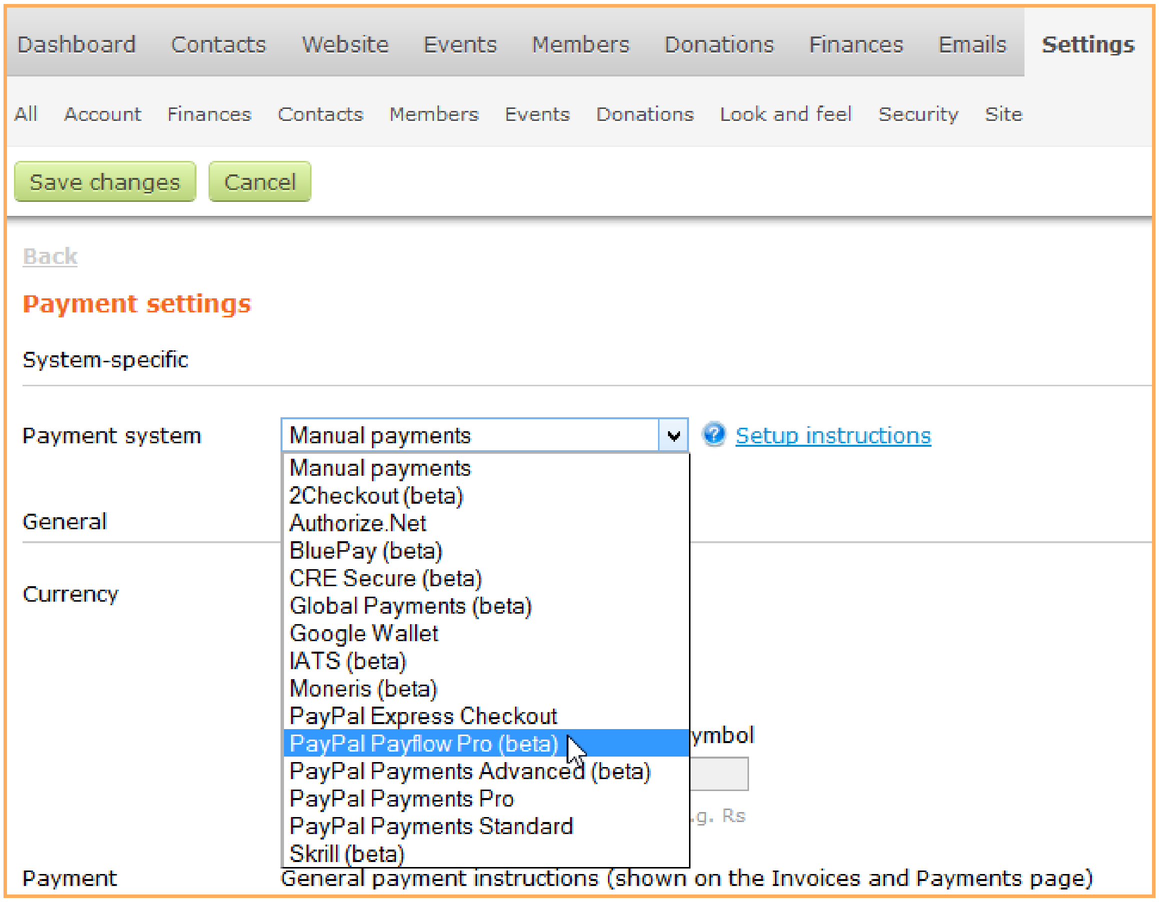

Managing PayFlow users</td></tr>
<tr><td>Password</td><td>The password you created when you registered for the account.</td></tr>
</table>

Payment settings for PayPal Payflow Pro

Once you have a PayPal Payflow Pro account, follow these steps to integrate PayPal Payflow Pro into your Wild Apricot site:

Read more/less

1. Under the **Settings** menu, click **Finances**.
2. From the **Finances** settings screen, click **Payment settings**.
3. On the **Payment settings** screen, click the **Edit** button.
4. Click the **Payment system** drop-down list and select **PayPal Payflow Pro (beta)**.



5. If you want to begin accepting online payments immediately, click the **Live** radio button. If you want to test your settings using test or sandbox accounts provided by PayPal, click the **Test/Sandbox** radio button. While in test mode, your payment provider will accept or decline your test transactions as it would live transactions, but will not charge any credit cards or update any bank accounts. Wild Apricot will, however, create payment records and update Wild Apricot balances as it would with live transactions. For more information, see Live vs. test/sandbox modes.
6. In the **Partner** field, enter the ID provided to you by the authorized PayPal reseller who registered you for Payflow Pro. If you purchased your account directly from PayPal, use *PayPal*.
7. In the **Merchant login** field, enter your merchant login that you created when you registered for your PayPal Payflow Pro account.
8. In the **User** field, enter the ID of the user authorized to process transactions on your account. If you haven't set up additional users on the account, then enter your merchant ID.
9. In the **Password** field, enter the password you created when you registered for your PayPal Payflow Pro account.
10. Select the credit card types you want to accept. (These should match what you have set up in your PayPal Payflow Pro account.)
11. Click **Validate account** to make sure your PayPal Payflow Pro account details are valid. If the account validation fails, check to make sure you entered the account details properly.
12. Click the **Default country** drop-down list and select the country where the majority of your visitors reside. Your selection will appear as the default country to your customers.
13. Select the currency you want to use in your transactions.
    Note: *Do not change the currency after your site begins accepting online payments. If you change the currency, existing payment records will not be recalculated and will no longer display correct amounts.*
14. In the **Instructions** fields, add payment instructions to be displayed to your customers.
15. Click **Save changes**.

Now that you have set up your Wild Apricot site to receive online payments, a **Pay online** button will appear after a visitor to your site clicks the **Confirm** button while applying for membership or registering for an event.

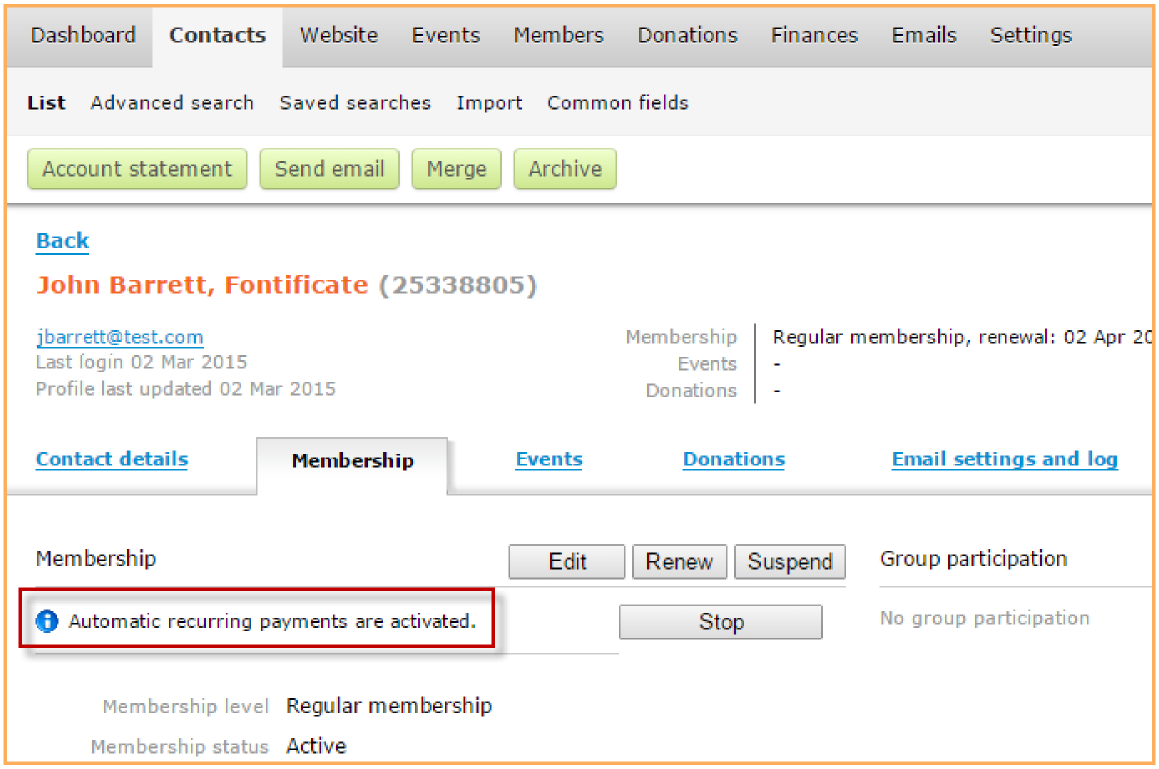
Testing recurring payments settings

To test whether recurring payments have been properly set up in your Wild Apricot account, follow these steps:

Read more/less

1. Make sure the status of your PayPal account is **Test**.

2. Within your Wild Apricot payment settings, set the **Connection mode** to **Test/Sandbox**.
3. Enter your account details, validate them, then save your changes.
4. Log out of your Wild Apricot account, or open your Wild Apricot account in another browser.
5. Now, test your recurring payment settings by applying as a test member to a membership level with recurring payments enabled. You can use the following test credit card:
   Number: 4111111111111111
   Expiry date: any date in the future
   CVV code: 000
6. Once the payment transaction is complete, check whether a recurring profile was created in PayPal. To do so, log into PayPal Manager then go to **Service Settings**, select **Recurring Billing**, and then **Manage Profiles**.
7. Check whether current payments have been enabled for the test member in Wild Apricot. To do so, open the member's contact details within admin view and click the **Membership** tab. A notice indicating that recurring payments have been activated should appear.



8. Once your test is successfully completed, go to PayPal Manager and switch the **Status** of your PayPal account to **Live**.
9. In Wild Apricot, go to the Payment settings screen and switch the **Connect mode** to **Live**.

Troubleshooting

If you have any troubles processing payments with PayPal Payflow Pro:

- Try to run a test transaction yourself and see what message you get from PayPal. You can then contact PayPal support with exact details.
- Check your PayPal account type. To accept credit card payments, you need Business or Premier account. Personal PayPal accounts cannot accept credit card payments. (See Which account type is right for you?)
- See Failed online payments

Video: Integrating PayPal Payflow Pro (5:0
3)

On this page:

Expand all sections

See also:

- Online payments
- Payments overview
- Recurring payments

PayPal Payments Advanced

Accepting online payments using PayPal Payments Advanced

PayPal Payments Advanced is a payment gateway that allows you to accept online payments on your Wild Apricot website. Before you can set up your Wild Apricot site to work with PayPal Payments Advanced, you must set up an account with PayPal.

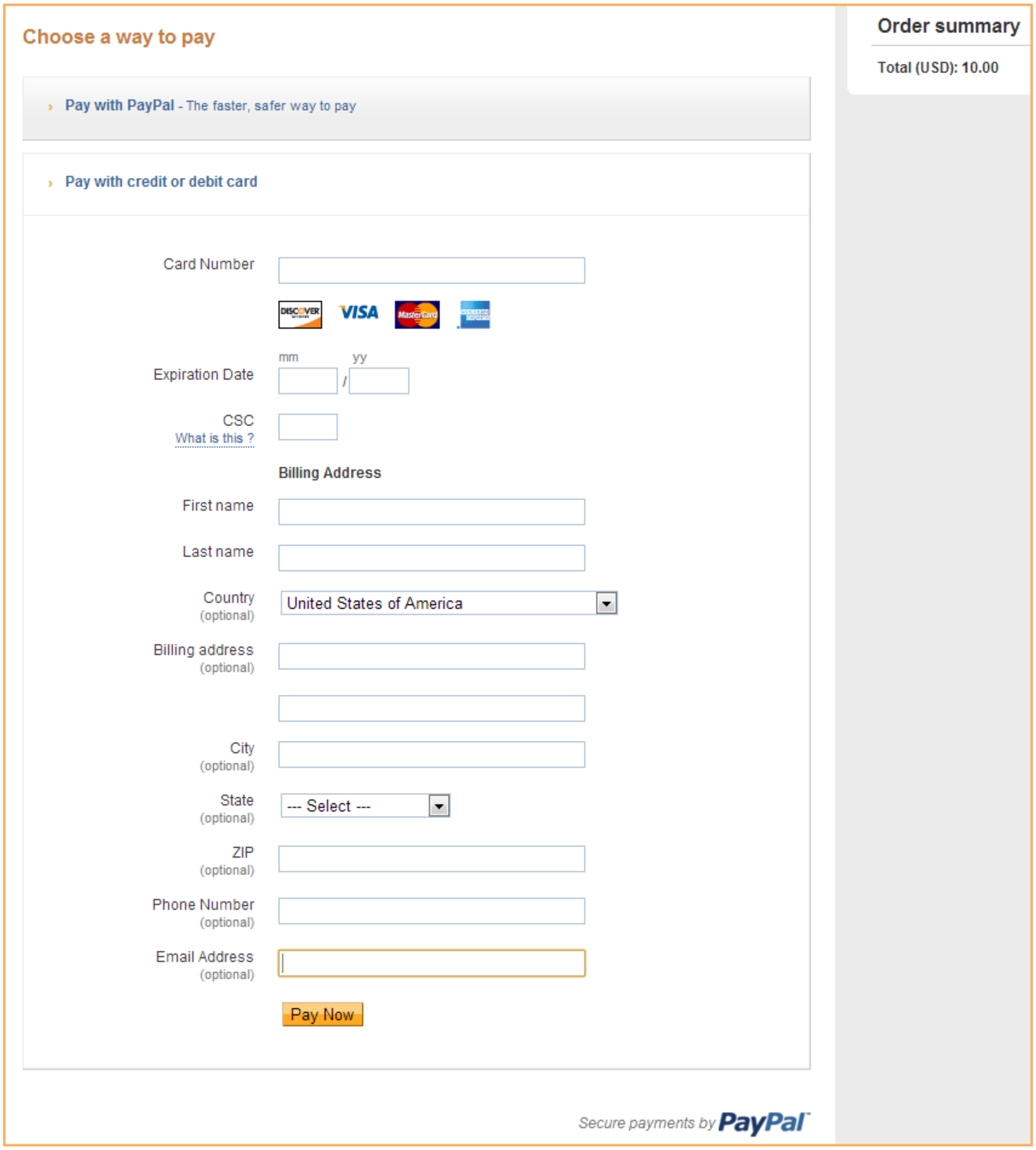
> Support for PayPal Payments Advanced is being provided without full testing in a live environment. During this initial implementation – the beta release – certain features such as automatic refunds will not be supported. For more information, see What does "beta" mean?

Paying using PayPal Payments Advanced

Once you've integrated your PayPal account with your Wild Apricot site, visitors to your site can pay online for membership fees and event registrations, and make donations.

Read more/less

When a visitor fills out an integrated online form on your Wild Apricot website (e.g. membership application or event registration) and chooses to pay online, they will be redirected to PayPal's site to make the payment.



From here, they can log into their PayPal account or pay with their credit or debit card.

After the payment is processed, the visitor is returned to the Invoices and payments tab on their member profile, where an invoice will appear, along with a payment entry, if the payment was successful.

For information about the transaction – including transaction ID and status – check your PayPal account's IPN (Instant Payment Notification) history. To view your IPN history, go to PayPal, click **My Account**, then under **History** select **IPN History**.

Setting up your PayPal account

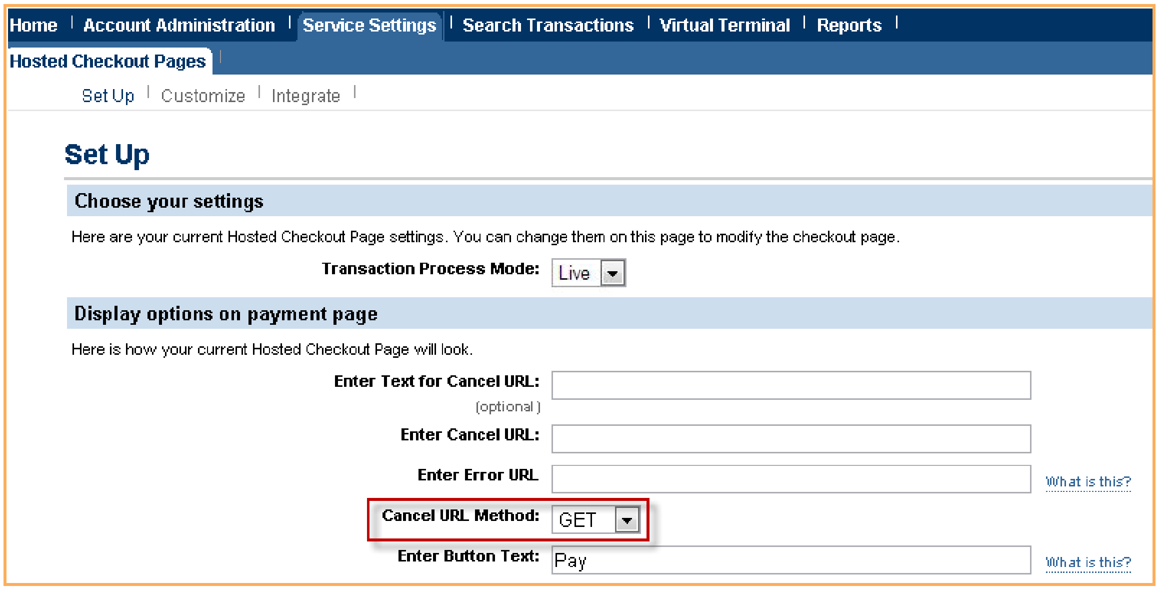
Instructions for third-party payment systems are provided as a courtesy and may contain out of date information or screen clips. For the latest instructions, consult the payment provider's website.

To accept online payments through PayPal Payments Advanced, you must have a Business or Premier PayPal account.

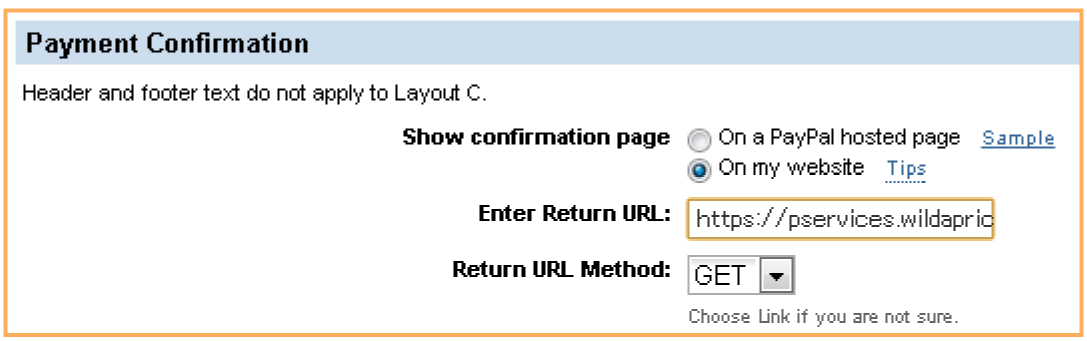
Read more/less

To configure your PayPal account to work with Wild Apricot, you need to log into your PayPal Manager, then click the **Service Settings** t ab and adjust the following settings on the **Set Up** page.

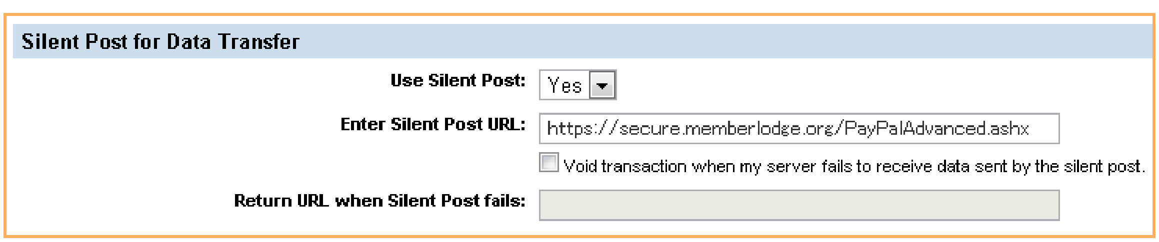
- Select **GET** as the **Cancel URL Method** under **Display options on payment page**.



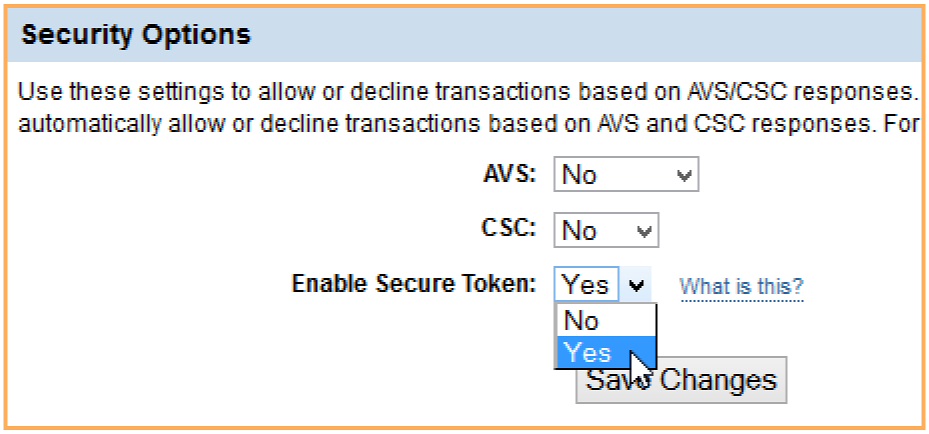
- Under **Payment Confirmation:**
  - Set **Show confirmation page** to **On my website**.
  - Set the **Return URL** to https://pservices.wildapricot.com/Transfer.ashx
  - Set the **Return URL Method** to **GET**.



- Under **Silent Post Data Transfer**:
  - Set **Use Silent Post** to **Yes**.
  - Set the **Silent Post URL** to https://secure.memberlodge.org/PayPalAdvanced.ashx



- Under **Security Options**:
  - Set **Enable Secure Token** to **Yes**.



- Click **Save Changes**.

> If you choose to customize your checkout page, pick either Layout A or Layout B. Wild Apricot does not currently support Layout C.

Integrating your PayPal account with Wild Apricot

Once you've set up your PayPal account, you can integrate it into your Wild Apricot site.

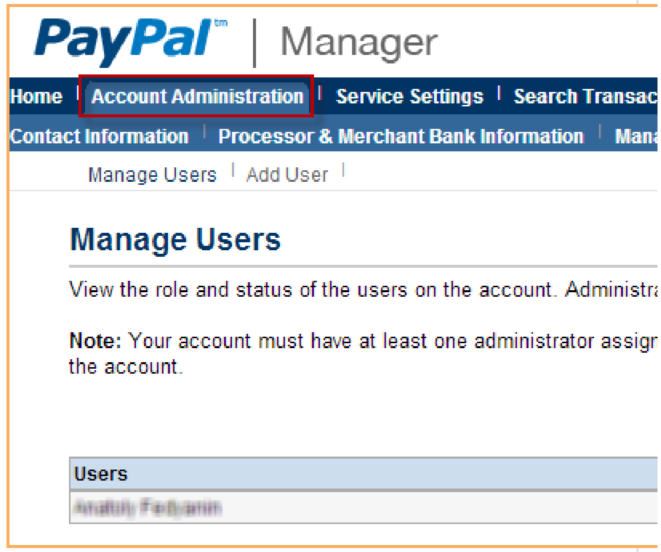
> Other Wild Apricot administrators with full access privileges will be able to see your payment account credentials, so you might consider limiting administrative privileges accordingly. For example, you could grant full privileges until site setup is complete then remove or restrict the administrator privileges before setting up online payments.

What you need to get started

To integrate your PayPal Payments Advanced account with Wild Apricot, you'll need the following information:

Read more/less

Field	Description
Partner	The ID provided to you by the authorized PayPal reseller who registered you for PayPal Payments Advanced. If you purchased your account directly from PayPal, use *PayPal*.
Merchant Login	Your merchant login ID that you created when you registered for the account.

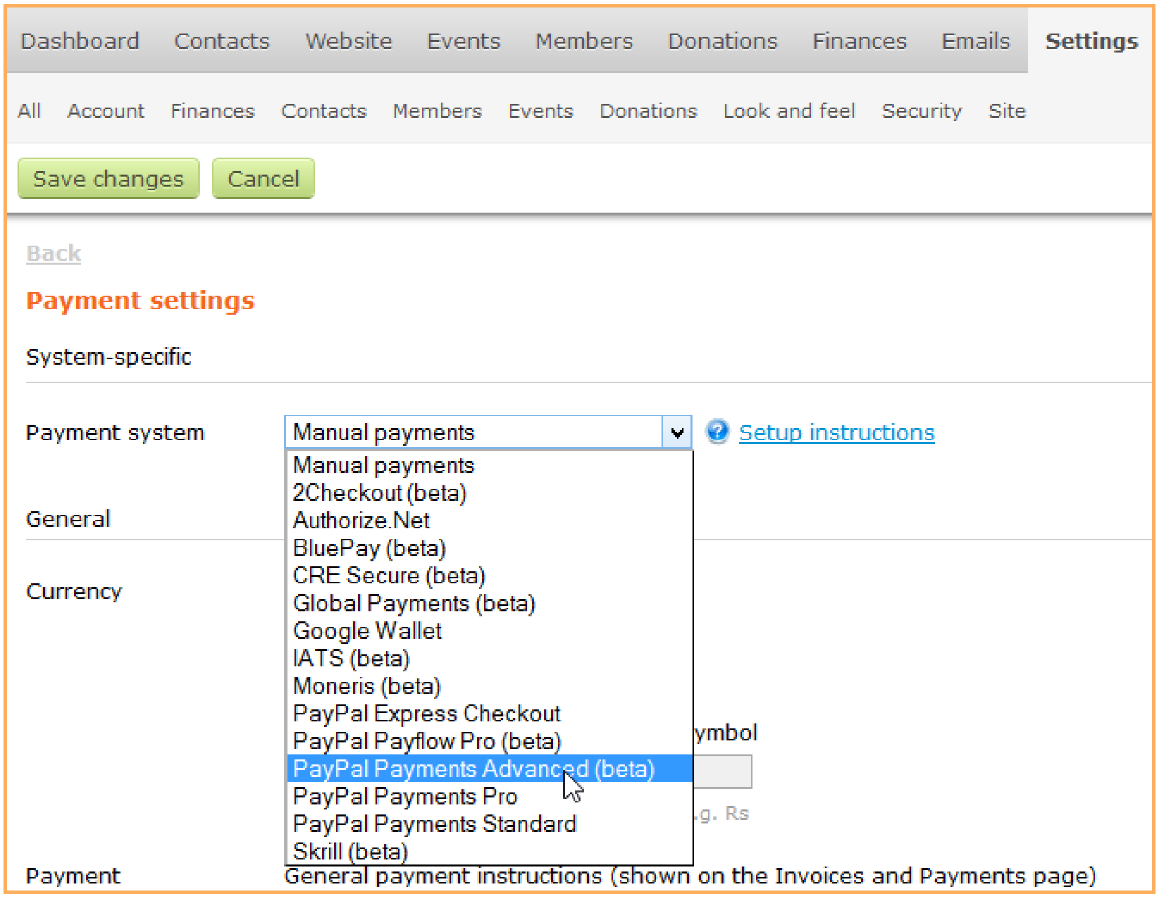
User	If you have set up multiple users on your account, you'll need the ID of the user authorized to process transactions. If you haven't set up additional users on the account, then enter your merchant ID as the user. To manage users on your account, go to your PayPal account and click the **Manage Users** tab under **Account Administration**. 
Password	The password you created when you registered for the account.

Payment settings for PayPal Payments Advanced

To integrate your PayPal Payments Advanced account into your Wild Apricot site, follow these steps:

Read more/less

1. Under the **Settings** menu, click **Finances**.
2. From the **Finances** settings screen, click **Payment settings**.
3. On the **Payment settings** screen, click the **Edit** button.
4. Click the **Payment system** drop-down list and select **PayPal Payments Advanced**.



5. If you want to begin accepting online payments immediately, click the **Live** radio button. If you want to test your settings using test or sandbox accounts provided by PayPal, click the **Test/Sandbox** radio button. While in test mode, your payment provider will accept or decline your test transactions as it would live transactions, but will not charge any credit cards or update any bank accounts. Wild Apricot will, however, create payment records and update Wild Apricot balances as it would with live transactions. For more information, see Live vs. test/sandbox modes.
6. In the **Merchant login** field, enter your merchant login ID that you created when you registered for your PayPal Payments Advanced account.
7. In the **Partner** field, enter the ID provided to you by the authorized PayPal reseller who registered you for PayPal Payments Advanced. If you purchased your account directly from PayPal, use *PayPal*.
8. In the **User** field, enter the ID of the user authorized to process transactions on your account. If you haven't set up additional users on the account, then enter your merchant ID.
9. In the **Password** field, enter the password you created when you registered for your PayPal account.
10. Click **Validate account** to make sure your PayPal account details are valid. If the account validation fails, check to make sure you entered the account details properly.
11. Click the **Default country** drop-down list and select the country where the majority of your visitors reside. Your selection will appear as the default country to your customers.
12. Select the currency you want to use in your transactions.
    Note: *Do not change the currency after your site begins accepting online payments. If you change the currency, existing payment records will not be recalculated and will no longer display correct amounts.*
13. In the **Instructions** fields, add payment instructions to be displayed to your customers.
14. Click **Save changes**.

Now that you have set up your Wild Apricot site to receive online payments, a **Pay online** button will appear after a visitor to your site clicks the **Confirm** button while applying for membership or registering for an event.

Recurring payments

Recurring payments are not supported within PayPal Payments Advanced.

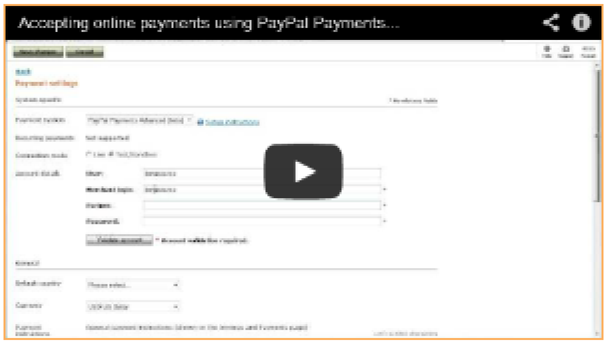
Troubleshooting

If someone trying to pay an invoice on your site receives a **Checkout Error: PayPal Express Checkout is not setup on this account** mess age, you should make the following change to your PayPal account:

1. Go to PayPal and log into your PayPal Manager.
2. Click the **Service Settings** tab.
3. Click the **Set Up** link.
4. Within the **Choose your settings** section, switch the **Transaction Process Mode** from **Test** to **Live**.

If you have any other troubles processing payments with PayPal Payments Advanced:

- Try to run a test transaction yourself and see what message you get from PayPal. You can then contact PayPal support with exact details.
- Check your PayPal account type. To accept credit card payments, you need Business or Premier account. Personal PayPal accounts cannot accept credit card payments. (See Which account type is right for you?)
- See Failed online payments



Video: Integrating PayPal Payments Advanced (4:48)

On this page:

- Paying using PayPal Payments Advanced
- Setting up your PayPal account
- Integrating your PayPal account with Wild Apricot
  - What you need to get started
  - Payment settings for PayPal Payments Advanced
- Recurring payments
- Troubleshooting

Expand all sections

See also:

- Online payments
- Payments overview

PayPal Payments Pro

Accepting online payments using PayPal Payments Pro

PayPal Payments Pro is a payment system you can use to accept online credit card payments on your website. It can be used for one-time payments or recurring payments.

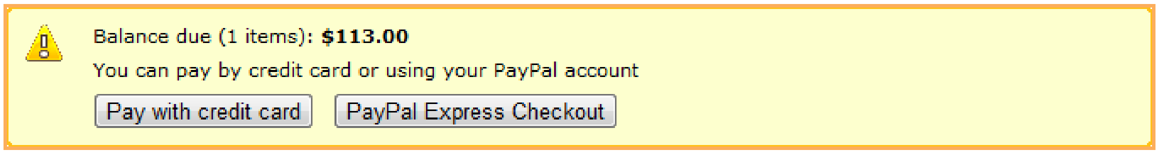
> PayPal Payments Pro is a monthly subscription service. If you're not paying a monthly fee to PayPal, you're probably using PayPal Express Checkout.

Before you can set up your Wild Apricot site to work with PayPal Payments Pro, you must set up an account with PayPal.

Paying using PayPal Payments Pro

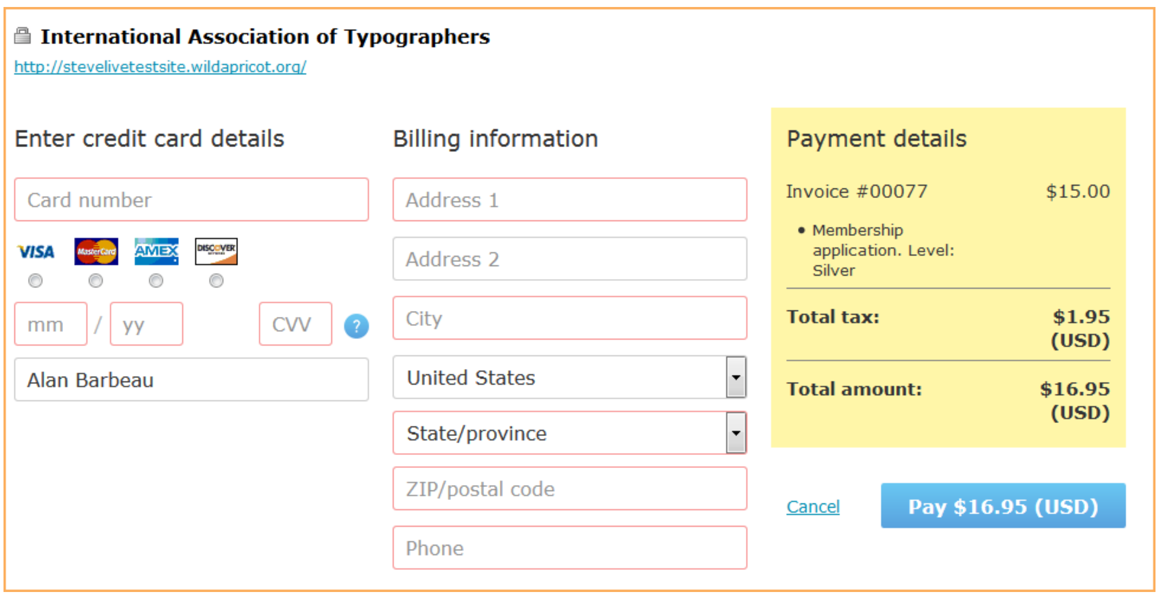
Once you've integrated your PayPal account with your Wild Apricot site, visitors to your site can pay online for membership fees and event registrations, and make donations.

When a visitor fills out an integrated online form on your Wild Apricot website (e.g. membership application or event registration) and clicks the **Confirm** button, they will have the choice of paying with a credit card or paying using PayPal Express Checkout.



Using a credit card

If they choose to pay with a credit card, they will be redirected to a secure Wild Apricot payment form to make the payment.
Read more/less

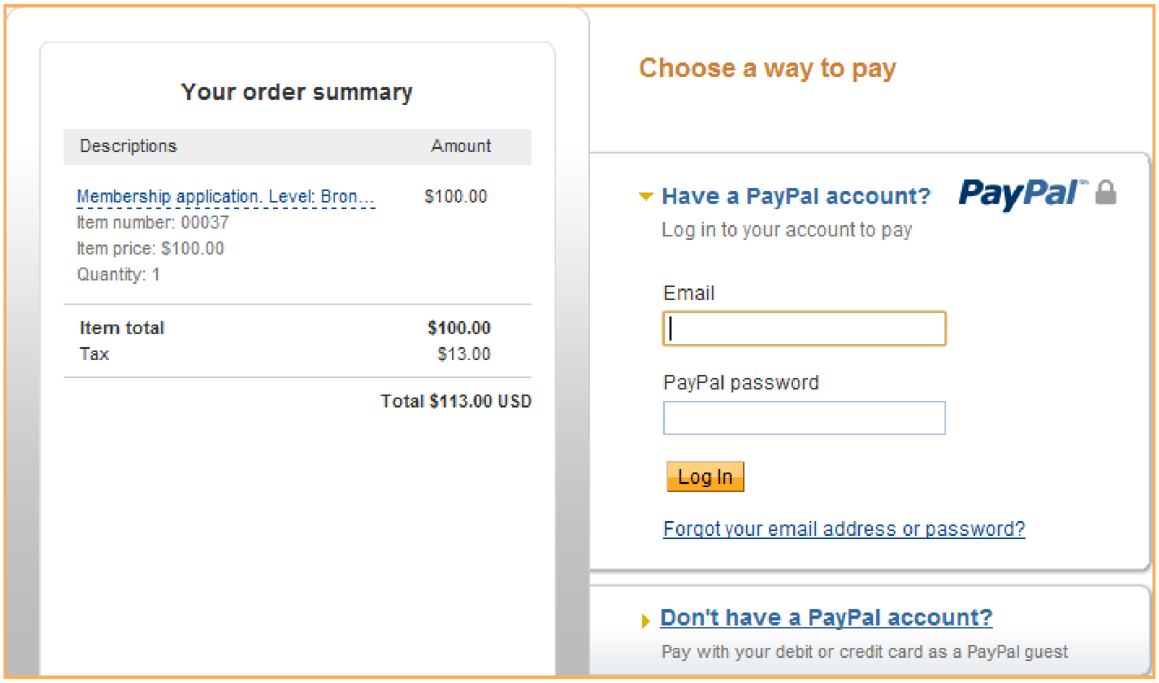


On the form, they fill out their credit card details and their billing information, then click the **Pay** button to complete the payment.

Wild Apricot does not store credit card information. Instead, it is securely transmitted to PayPal where it is processed. PayPal then returns the status of the payment transaction, which is recorded in your Wild Apricot transaction details.

Using PayPal Express Checkout

If they choose PayPal Express Checkout, they will be redirected to PayPal's site where they can use their PayPal account or their credit or debit card to make the payment.
Read more/less



Membership applicants for levels with recurring payments must use their PayPal account.

From here, they can log into their PayPal account or enter their credit card or debit card details. Then they will be returned to the Wild Apricot site, where they can confirm and complete the purchase.

For information about the transaction – including transaction ID and status – check your PayPal account's IPN (Instant Payment Notification) history. To view your IPN history, go to PayPal, click **My Account**, then under **History** select **IPN History**.

Integrating your PayPal account with Wild Apricot

Instructions for third-party payment systems are provided as a courtesy and may contain out of date information or screen clips. For the latest instructions, consult the payment provider's website.

To accept online payments through PayPal Payments Pro, you must have a PayPal Business account. See PayPal account setup for recommended account settings.

Recurring payments

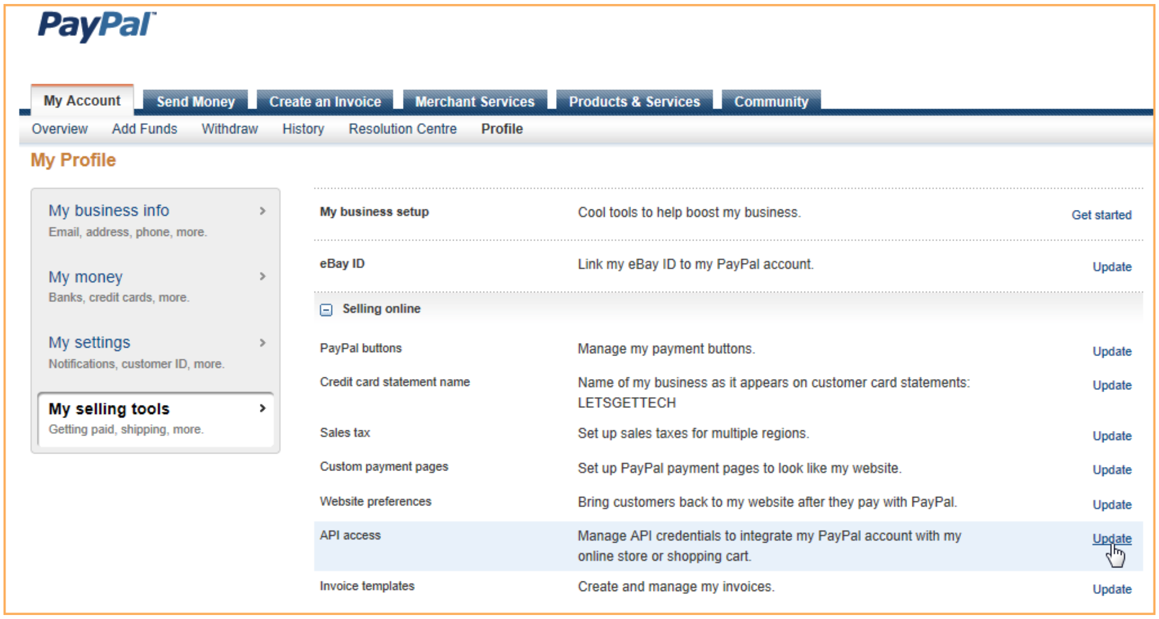
If you want to set up recurring payments for membership fees, you must enable instant payment notification (IPN) in your PayPal account. For instructions on enabling IPN, see Recurring payments . You should also subscribe to the Recurring Payments service . If you do not subscribe to this service, members can only pay for recurring memberships using the **PayPal Express Checkout** button. Any attempts to pay using the **Pay with credit card** option will fail.

What you need to get started

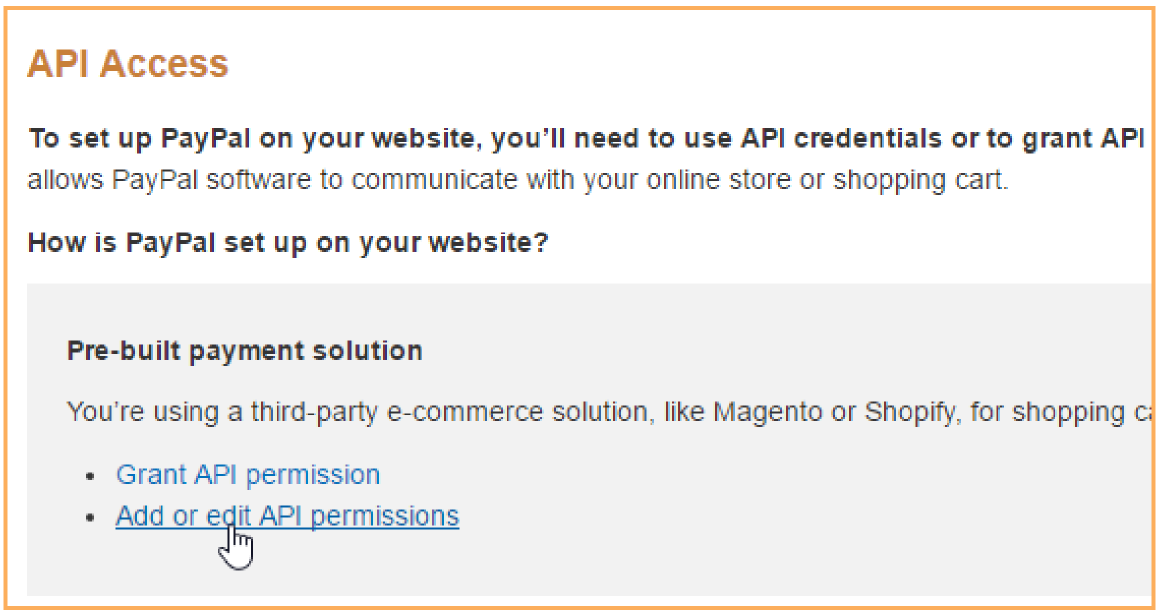
To integrate your PayPal account with Wild Apricot, you will need your PayPal account ID (your email address), your API username, your API password, and your API signature. To view or request your API credentials, follow these steps:

Read more/less

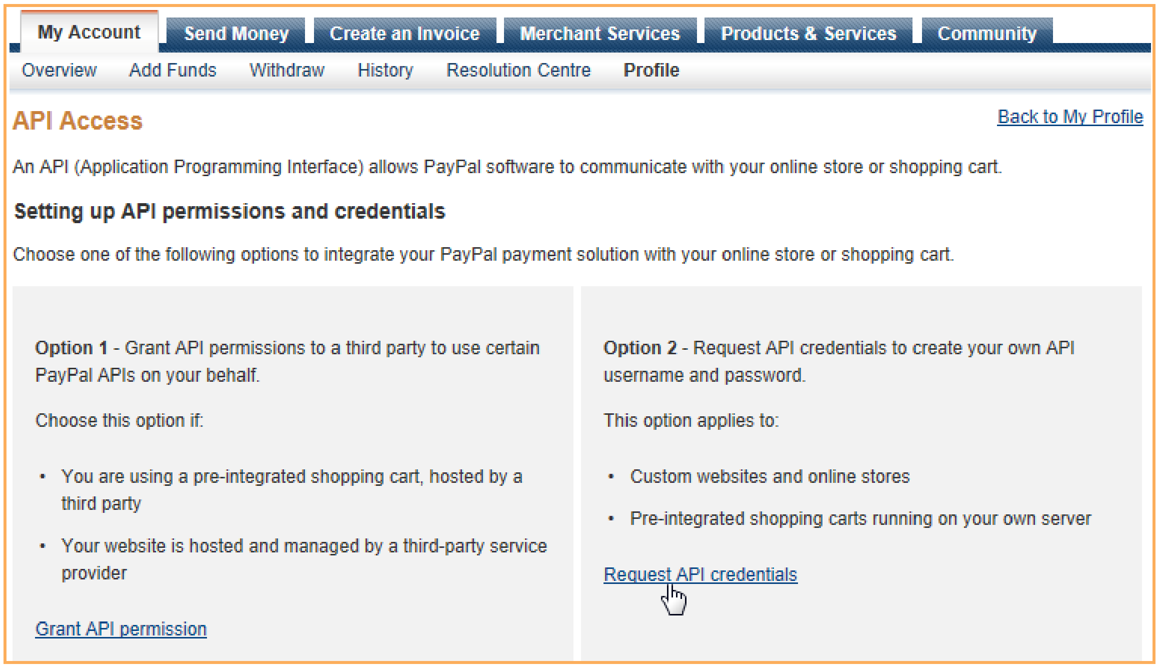
1. Log into your PayPal account.
2. Click the **Profile** tab.
3. Click **My selling tools**.
4. Click **Update** beside **API Access** under **Selling online**.



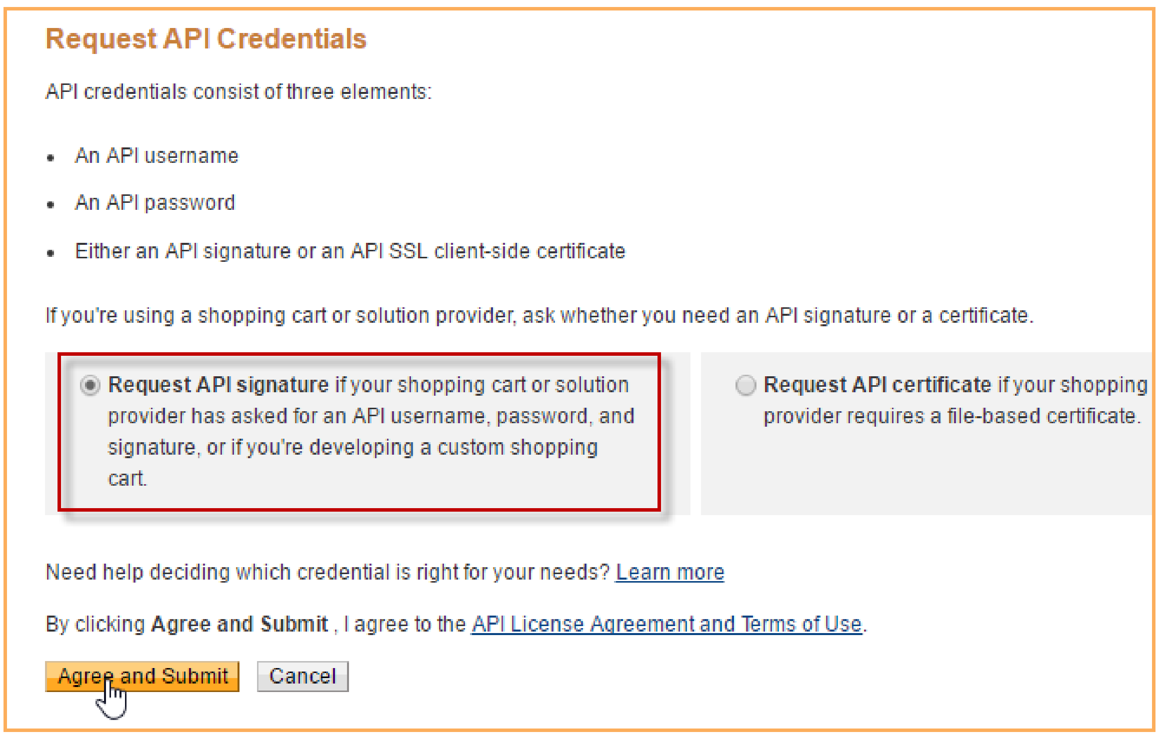
5. From the API Access screen, click the **Add or edit API permissions** link.



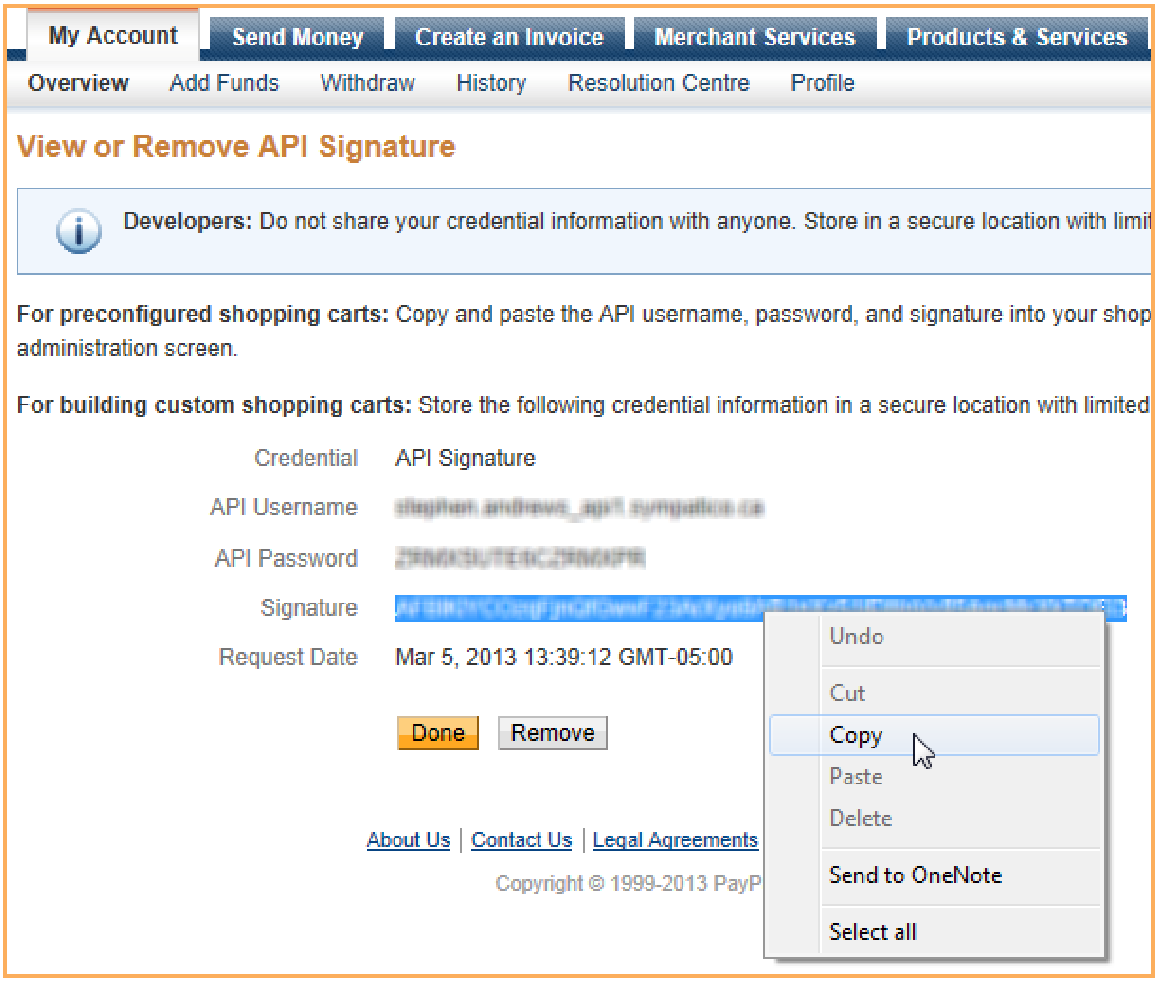
6. If you haven't requested API credentials before, click the **Request API credentials** link. If you have previously requested API credentials, click **View API signature**.



7. If you haven't requested your API credentials before, make sure the **Request API signature** option is selected then click the **Agr ee and Submit** button. (This step doesn't occur if you are asking to view previously requested credentials.)



8. The details of your API signature now appears. You can copy them and paste them into your Wild Apricot settings.



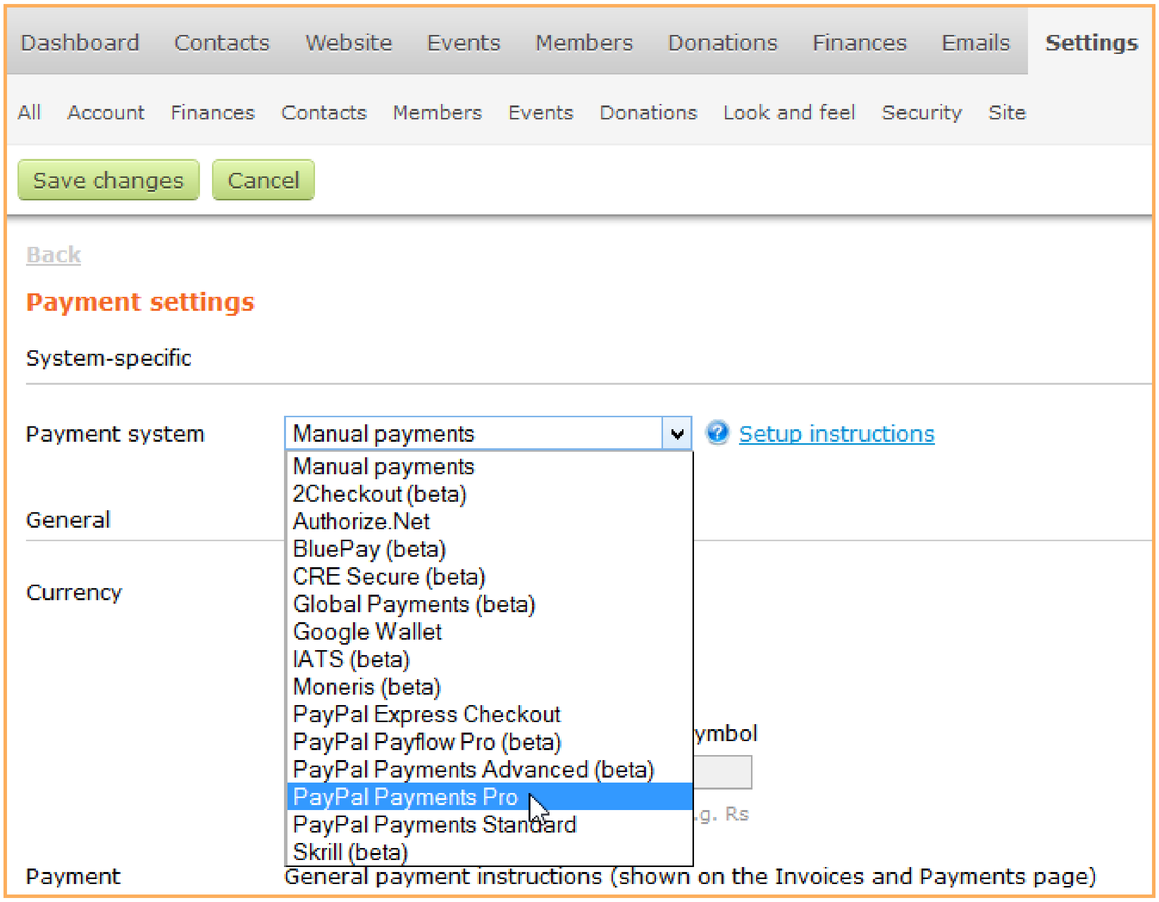
⚠ In rare cases, it is necessary to enable multiple payments per invoice ID within your PayPal settings to get recurring payments to work with PayPal Payments Pro.

Payment settings for PayPal Payments Pro

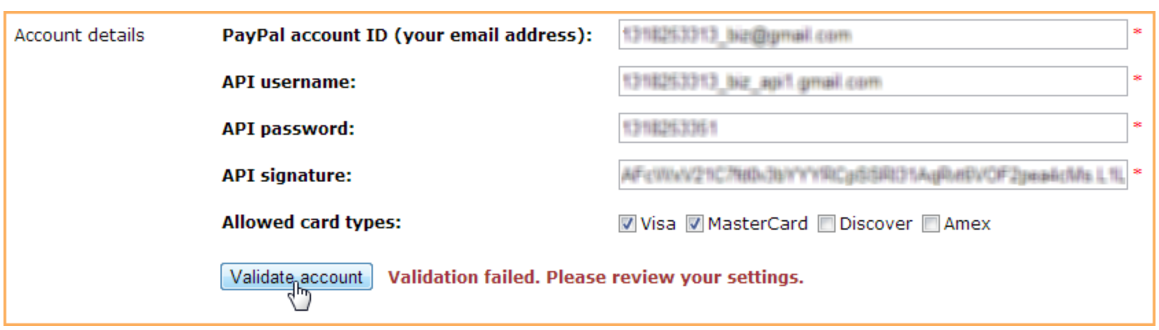
Once you have set up your PayPal account, follow these steps to integrate it with your Wild Apricot site:

Read more/less

1. Under the **Settings** menu, click **Finances**.
2. From the **Finances** settings screen, click **Payment settings**.
3. On the **Payment settings** screen, click the **Edit** button.
4. Click the **Payment system** drop-down list and select **PayPal Payments Pro**.



5. If you want to begin accepting online payments immediately, click the **Live** radio button. If you want to test your settings using tes t or sandbox accounts provided by PayPal, click the **Test/Sandbox** radio button. While in test mode, your payment provider will accept or decline your test transactions as it would live transactions, but will not charge any credit cards or update any bank accounts. Wild Apricot will, however, create payment records and update Wild Apricot balances as it would with live transactions. For more information, see Live vs. test/sandbox modes.
6. Enter your **PayPal account ID** (your email address).
7. Enter your **API username**, **API password**, and **API signature**.
8. Select the credit card types you want to accept. (These should match what you have set up in your PayPal account.)
9. Click **Validate account** to make sure your account details are valid.



If the account validation fails, check to make sure you entered the account details properly.

10. Select the default country you want to display to the customers for online payments.
11. Select the currency you want to use in your transactions. (This should match your PayPal account currency.)

    Note: *Do not change the currency after your site begins accepting online payments. If you change the currency, existing payment records will not be recalculated and will no longer display correct amounts.*
12. Add payment instructions to be displayed to the customer.
13. Click **Save changes**.

Troubleshooting

If you encounter problems using PayPal Payments Pro to process transactions on your Wild Apricot site, check the following:

- Make sure you have accepted PayPal's billing agreement. After your PayPal account has been approved, you need to accept the billing agreement from within your PayPal Pro account.
- Contact PayPal to see if there are any issues with your PayPal account (you may have missed some payments, for example).
- Check your Wild Apricot audit log for transaction errors and compare them to the list of PayPal error codes.

Video: Integrating PayPal Payments Pro (7:08)

On this page:

Expand all sections

See also:

- PayPal account setup
- Online payments
- Payments overview

PayPal Payments Standard

Accepting online payments using PayPal Payments Standard

PayPal Payments Standard is a payment method you can use to accept online credit card payments on your website. You can use it for one-time payments or recurring payments .

> ⓘ If you are using PayPal Payments Standard, you should consider the PayPal Express Checkout option since it provides better support for recurring payments for the same cost.

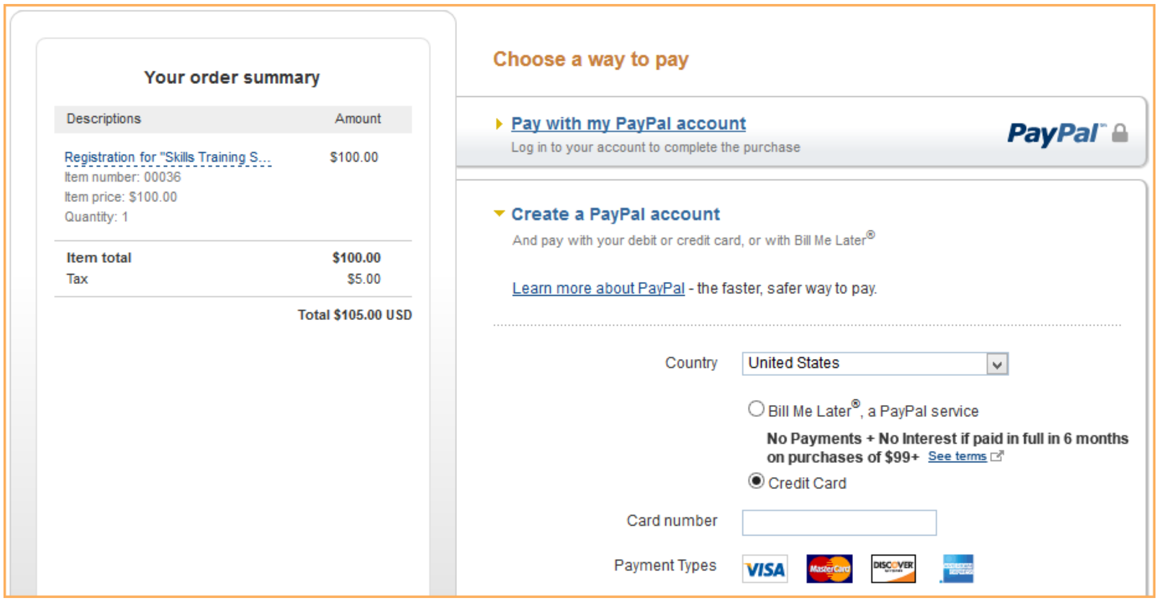
Before you can set up your Wild Apricot site to work with PayPal Payments Standard, you must set up an account with PayPal.

Paying using PayPal Payments Standard

Once you've integrated your PayPal account with your Wild Apricot site, visitors to your site can pay online for membership fees and event registrations, and make donations.

Read more/less

When a visitor fills out an integrated online form on your Wild Apricot website (e.g. membership application or event registration) and chooses to pay online, they will be redirected to PayPal's site to make the payment.



From here, they can log into their PayPal account or pay with their credit or debit card.

Membership applicants for levels with recurring payments must use their PayPal account.

After the transaction is completed, PayPal displays a confirmation page. The confirmation page will include a link back to your Wild Apricot site.

For information about the transaction – including transaction ID and status – check your PayPal account's IPN (Instant Payment Notification) history. To view your IPN history, go to PayPal, click **My Account**, then under **History** select **IPN History**.

Integrating your PayPal account with Wild Apricot

Instructions for third-party payment systems are provided as a courtesy and may contain out of date information or screen clips. For the latest instructions, consult the payment provider's website.

To accept online payments through PayPal Payments Standard, you must have a Business or Premier PayPal account. See PayPal account setup for recommended account settings.

Recurring payments

If you want to set up recurring payments for membership fees, you must enable instant payment notification (IPN) in your PayPal account. For instructions on enabling IPN, see Recurring payments.

What you need to get started

To integrate your PayPal Payments Standard account with Wild Apricot, you will need your PayPal account ID (your email address) and your PDT identity token.

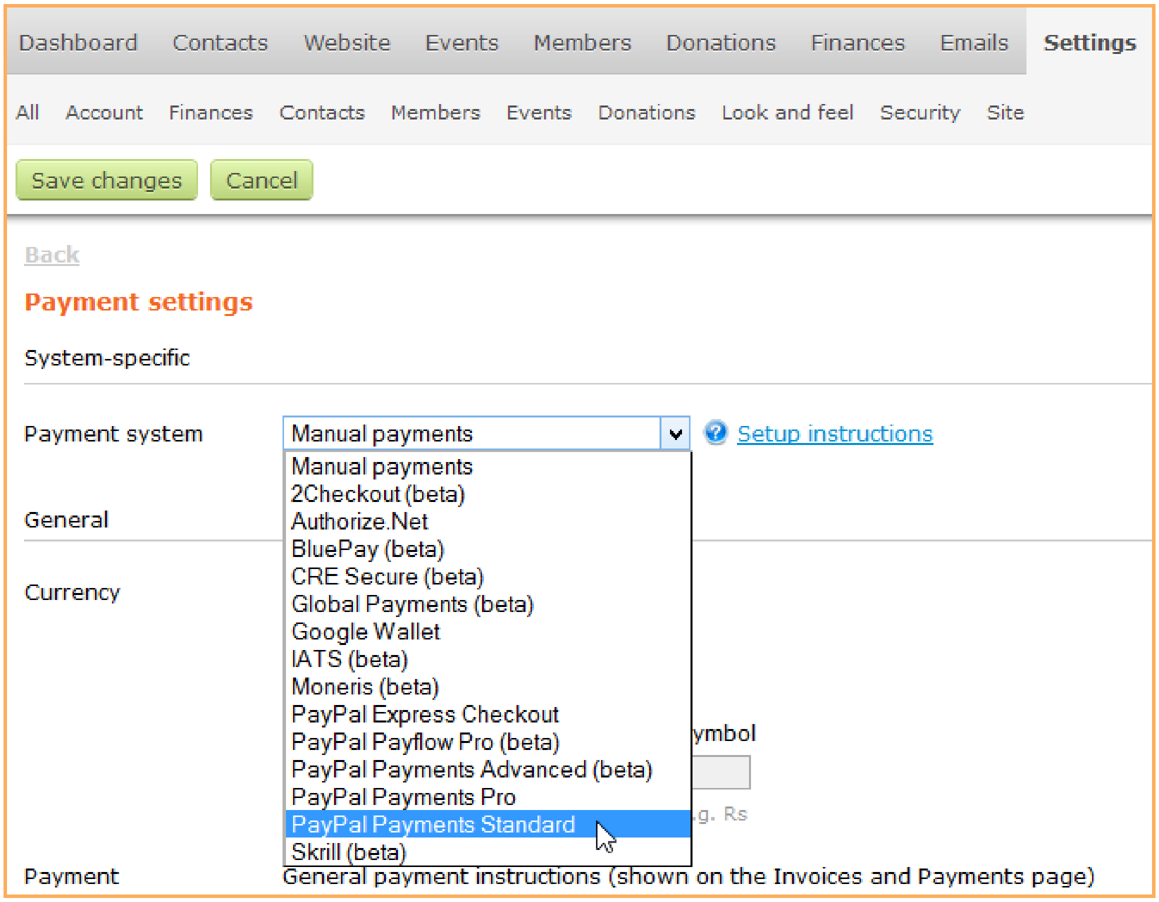
Payment settings for PayPal Payments Standard

Once you have set up your PayPal account, follow these steps to integrate it with your Wild Apricot site:

Read more/less

1. Under the **Settings** menu, click **Finances**.

2. From the **Finances** settings screen, click **Payment settings**.
3. On the **Payment settings** screen, click the **Edit** button.
4. Click the **Payment system** drop-down list and select **PayPal Payments Standard**.



5. If you want to begin accepting online payments immediately, click the **Live** radio button. If you want to test your settings using tes t or sandbox accounts provided by PayPal, click the **Test/Sandbox** radio button. While in test mode, your payment provider will accept or decline your test transactions as it would live transactions, but will not charge any credit cards or update any bank accounts. Wild Apricot will, however, create payment records and update Wild Apricot balances as it would with live transactions. For more information, see Live vs. test/sandbox modes.
6. Enter your **PayPal account ID** (your email address).
7. Enter your **PDT identity token**.
8. Select the default country you want to display to the customers for online payments.
9. Select the currency you want to use in your transactions. (This should match your PayPal account currency.)

   Note: *Do not change the currency after your site begins accepting online payments. If you change the currency, existing payment records will not be recalculated and will no longer display correct amounts.*
10. Add payment instructions to be displayed to the customer.
11. Click **Save changes**.

Now that you have set up your Wild Apricot site to receive online payments, a **Pay online** button will appear after a visitor to your site clicks the **Confirm** button while applying for membership or registering for an event.

Troubleshooting

If you have any troubles processing payments with PayPal Payments Standard:

- Try to run a test transaction yourself and see what message you get from PayPal. You can then contact PayPal support with exact details.
- Check your PayPal account type. To accept credit card payments, you need Business or Premier account. Personal PayPal accounts cannot accept credit card payments. (See Which account type is right for you?)
- Check your PayPal account settings (see PayPal account setup)
- See Failed online payments

Video: Integrating PayPal Standard (6:44)

On this page:

Expand all sections

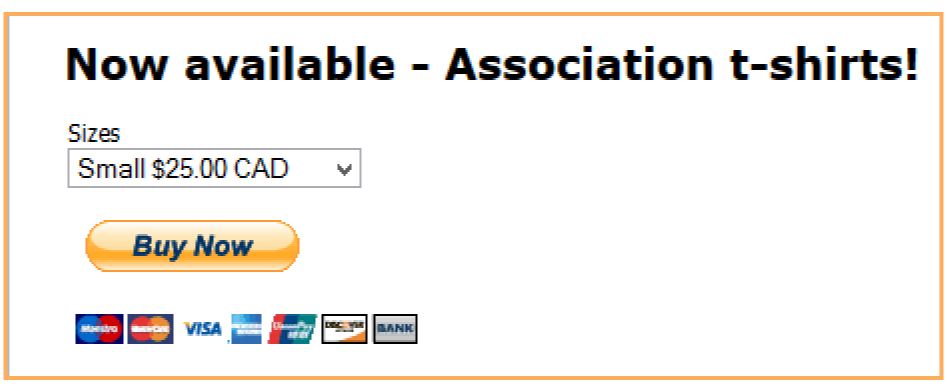
See also:

- Online payments
- Payments overview
- Recurring payments

Adding PayPal buttons

Adding PayPal buttons

Once you've set up your Wild Apricot site to accept online payments using PayPal, payments for event registrations, membership fees, and donations are handled automatically by Wild Apricot. If you want visitors to be able to make direct payments to your PayPal account for other items, you can add PayPal buttons to pages on your site. You might want use these buttons to sell merchandise since Wild Apricot does not currently offer an integrated online store. (For instructions on using third-party providers to set up an online store, see Setting up an online store.)

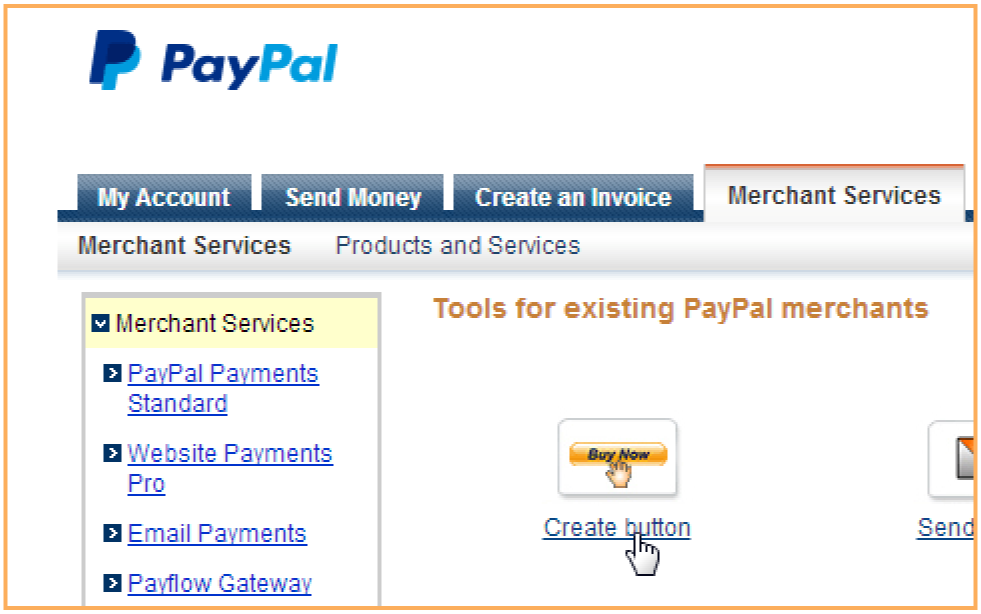


Purchases made using third-party online stores will not be recorded in your Wild Apricot database.

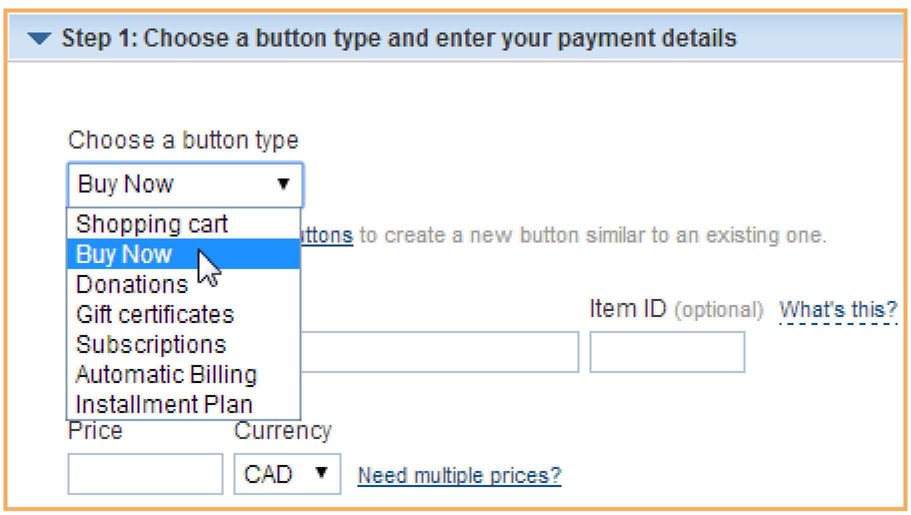
You can insert code to display a PayPal button into a content gadget or custom HTML gadget on a page or page template.

To add a PayPal button to a page or page template on your Wild Apricot site, follow these steps:

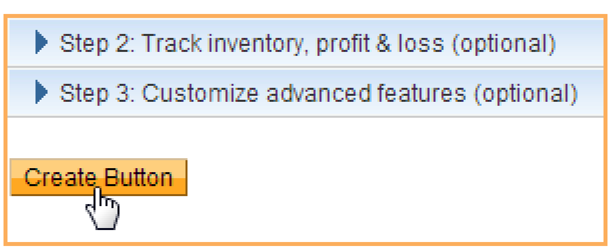
1. Sign in to your PayPal account.
2. Click the **Merchant Services** tab.
3. Click the Create button link.



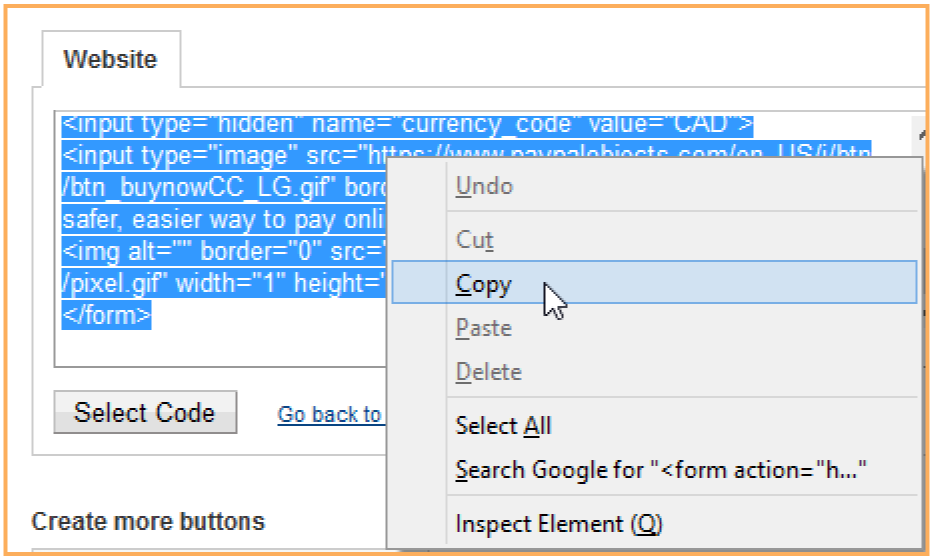
4. Choose the type of button you want to add.



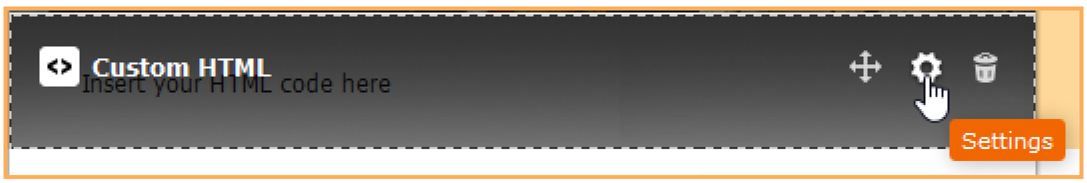
5. Enter the item details and customize your button using the options provided.
6. Click **Create button** at the bottom of the screen.



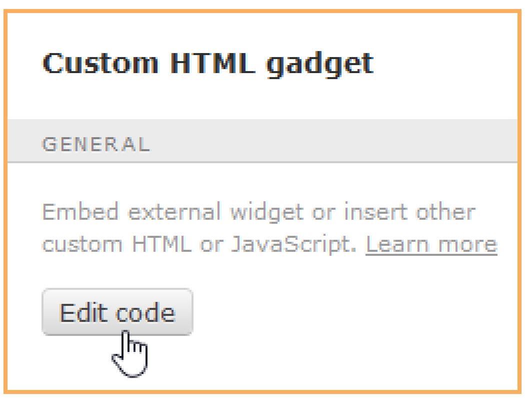
7. Select and copy the button code.



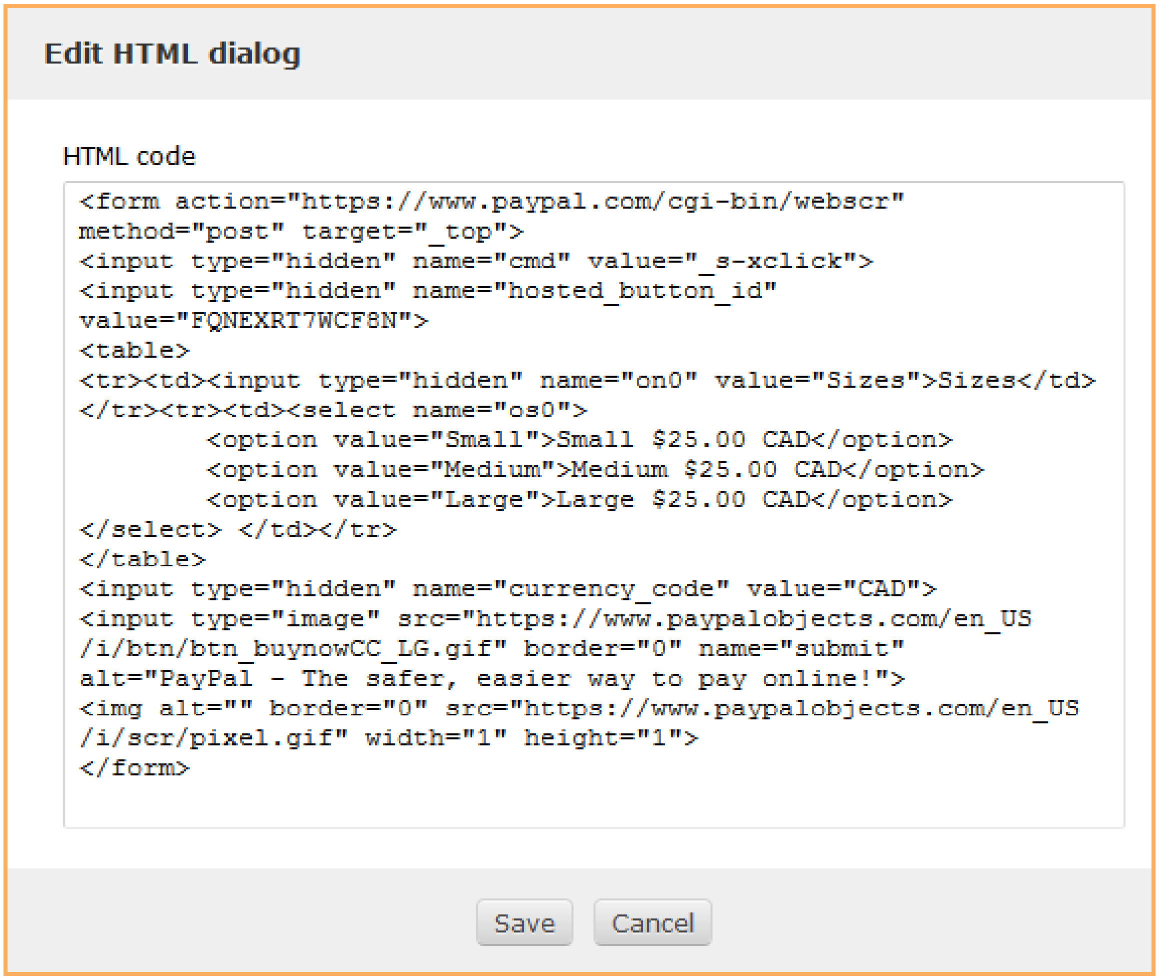
8. In Wild Apricot, go to **Site pages** (under the **Website** tab) and add a custom HTML gadget to the page or page template where you want the button to appear.
9. Hover over the custom HTML gadget then click the **Settings** icon.



10. Within the settings panel on the left, click the **Edit code** button.



11. In the code window that appears, paste the button code and click **Save**.



12. Click the **Save** button to save the changes to your page.

The PayPal button should now appear on your site page.

> Instead of creating a custom HTML gadget to execute the code, you can use the Snippet feature to embed the button code within a content gadget. For more information on using the Snippet feature, see Inserting and modifying HTML or JavaScript.

Skrill

Accepting online payments using Skrill (formerly Moneybookers)

Skrill (formerly Moneybookers) is an online payment processing service that allows you to accept online credit card payments on your website. Before you can integrate your Wild Apricot site with Skrill, you must have a Skrill account .

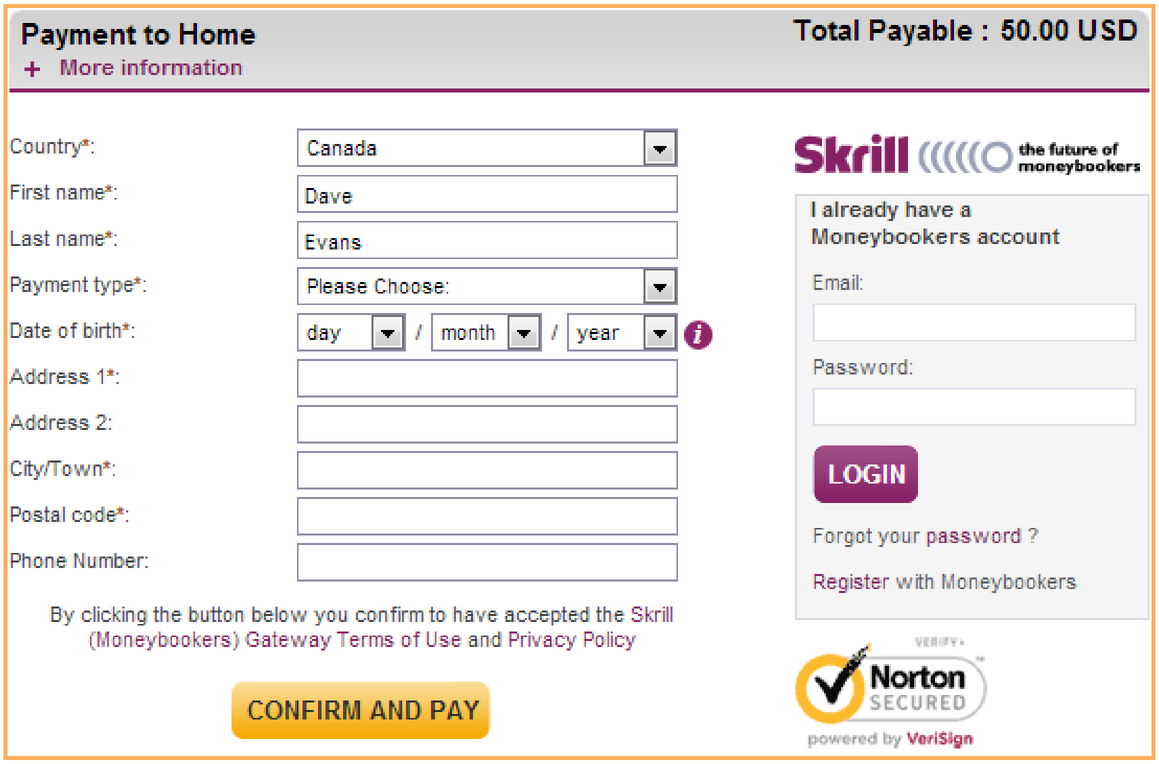
> Support for Skrill is being provided without full testing in a live environment. During this initial implementation – the beta release – certain features such as recurring payments and automatic refunds will not be supported. For more information, see What does "beta" mean?

Paying using Skrill

Once you've integrated your Skrill account with your Wild Apricot site, visitors to your site can pay online for membership fees and event registrations, and make donations.

Read more/less

When a visitor fills out an integrated online form on your Wild Apricot website (e.g. membership application or event registration) and chooses to pay online, they will be redirected to a secure Skrill payment screen (on moneybookers.com) to make the payment.



On the Skrill payment screen, they fill out their billing information, choose whether to pay by credit card or bank transfer, then click the **Co nfirm and Pay** button to complete the transaction.

After the payment is processed, the visitor is returned to the Invoices and payments tab on their member profile, where an invoice will appear, along with a payment entry, if the payment was successful.

For security reasons, credit card information is not stored in Wild Apricot. Instead, Skrill receives and processes the payment details, then returns the status of the payment transaction, which is recorded in your Wild Apricot transaction details.

Integrating your Skrill account with Wild Apricot

Instructions for third-party payment systems are provided as a courtesy and may contain out of date information or screen clips. For the latest instructions, consult the payment provider's website.

Before you can set up your Wild Apricot site to accept online payments through Skrill, you must have a Skrill account. To create a Skrill account, click here.

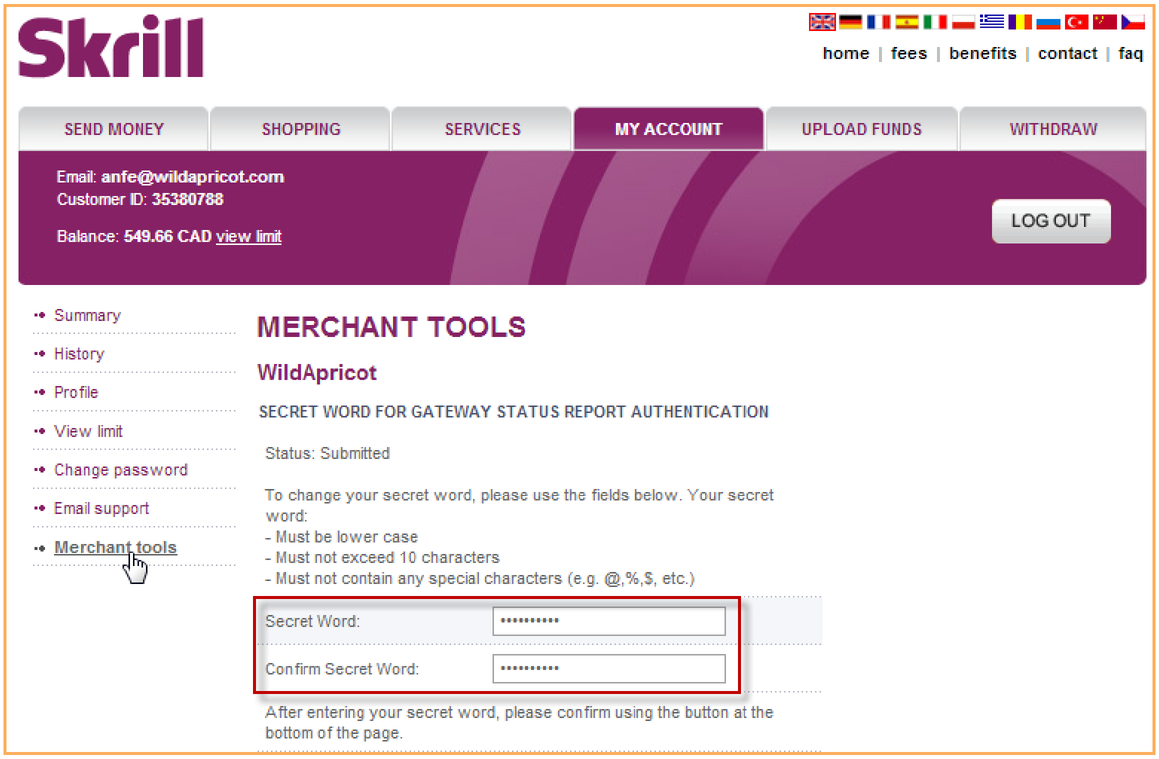
What you need to get started

To integrate your Skrill account with Wild Apricot, you will need the email associated with your Skrill account and your secret word. If you have a new account, you'll need to set up a secret word.

To set up a secret word for your Skrill account, follow these steps:

Read more/less

1. Log into your Skrill account.
2. Click the **My Account** tab at the top.
3. Click the **Merchant tools** link along the left.
4. Enter your secret word in the two fields.



5. Click the **Confirm** button at the bottom of the page.

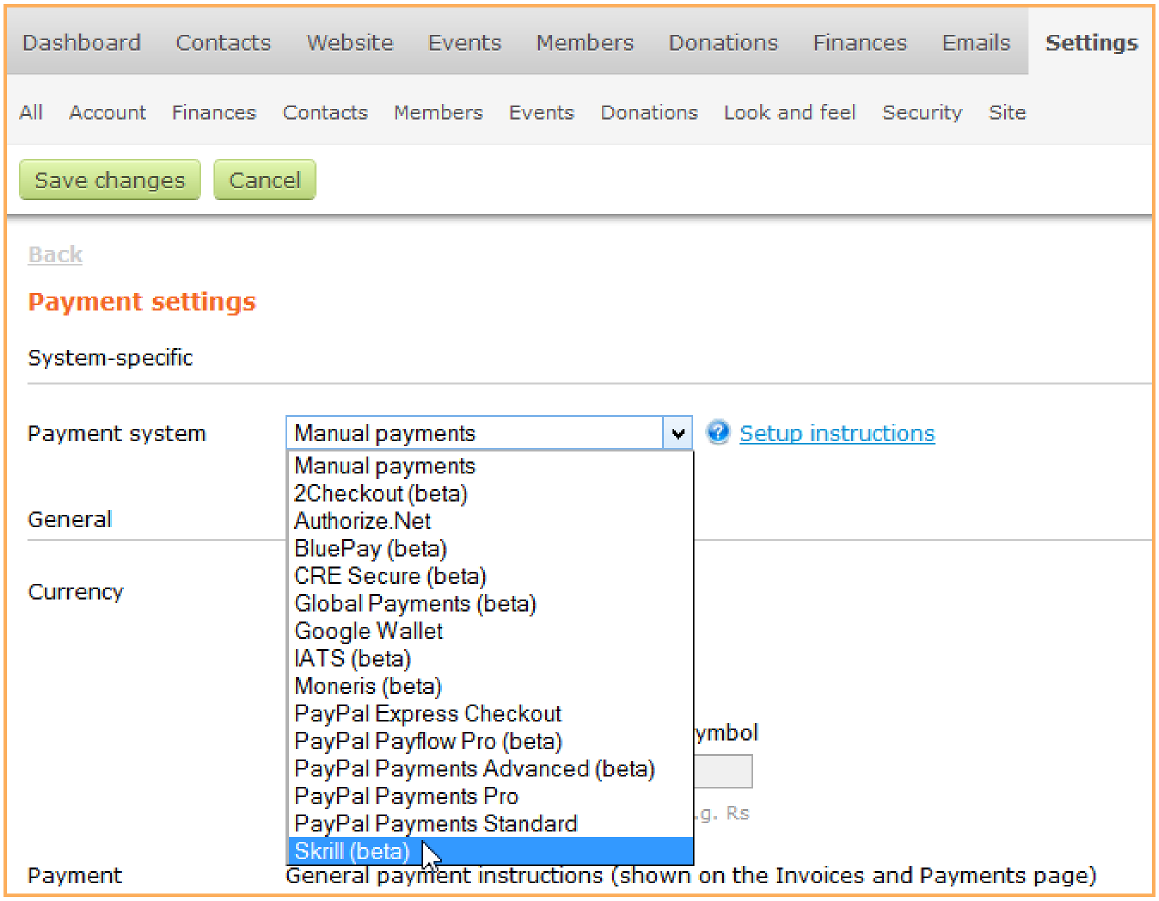
> If the **Merchant tools** link does not appear or is disabled, email **merchantservices@moneybookers.com** and request the option to be enabled for your account.

Payment settings for Skrill

Once you have a Skrill account, follow these steps to integrate Skrill into your Wild Apricot site:

Read more/less

1. Under the **Settings** menu, click **Finances**.
2. From the **Finances** settings screen, click **Payment settings**.
3. On the **Payment settings** screen, click the **Edit** button.
4. Click the **Payment system** drop-down list and select **Skrill (beta)**.



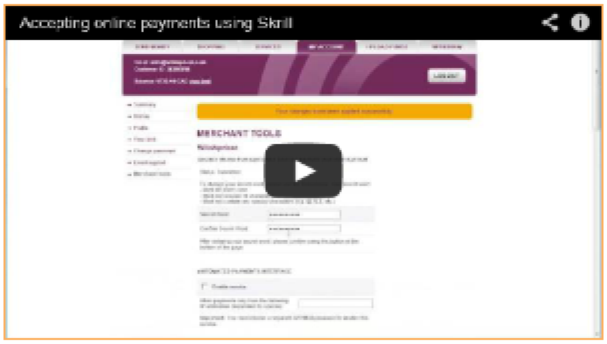
5. If you want to begin accepting online payments immediately, click the **Live** radio button. If you want to test your settings using test or sandbox accounts provided by your payment provider, click the **Test/Sandbox** radio button. While in test mode, your payment provider will accept or decline your test transactions as it would live transactions, but will not charge any credit cards or update any bank accounts. Wild Apricot will, however, create payment records and update Wild Apricot balances as it would with live transactions. For more information, see Live vs. test/sandbox modes.
6. In the **Pay to email** field, enter the email address associated with your Skrill account.
7. Click the **Language** drop-down and select the language to be used on the payment screen.
8. Enter your account's **Secret word**.
9. Leave the **Default country** selection as is. Skrill will ignore this selection and instead use the customer's IP address to determine the default country value.
10. Select the currency you want to use in your transactions.

    Note: *Do not change the currency after your site begins accepting online payments. If you change the currency, existing payment records will not be recalculated and will no longer display correct amounts.*
11. In the **Instructions** fields, add payment instructions to be displayed to your customers.
12. Click **Save changes**.

Now that you have set up your Wild Apricot site to receive online payments, a **Pay online** button will appear after a visitor to your site clicks the **Confirm** button while applying for membership or registering for an event.

Recurring payments

Recurring payments are supported by Skrill but are not supported by Wild Apricot during the initial implementation of this payment system.



Video: Integrating Skrill (4:37)

On this page:

- Paying using Skrill
- Integrating your Skrill account with Wild Apricot
    - What you need to get started
    - Payment settings for Skrill
- Recurring payments

Expand all sections

See also:

- Online payments
- Payments overview

Stripe

Accepting online payments using Stripe

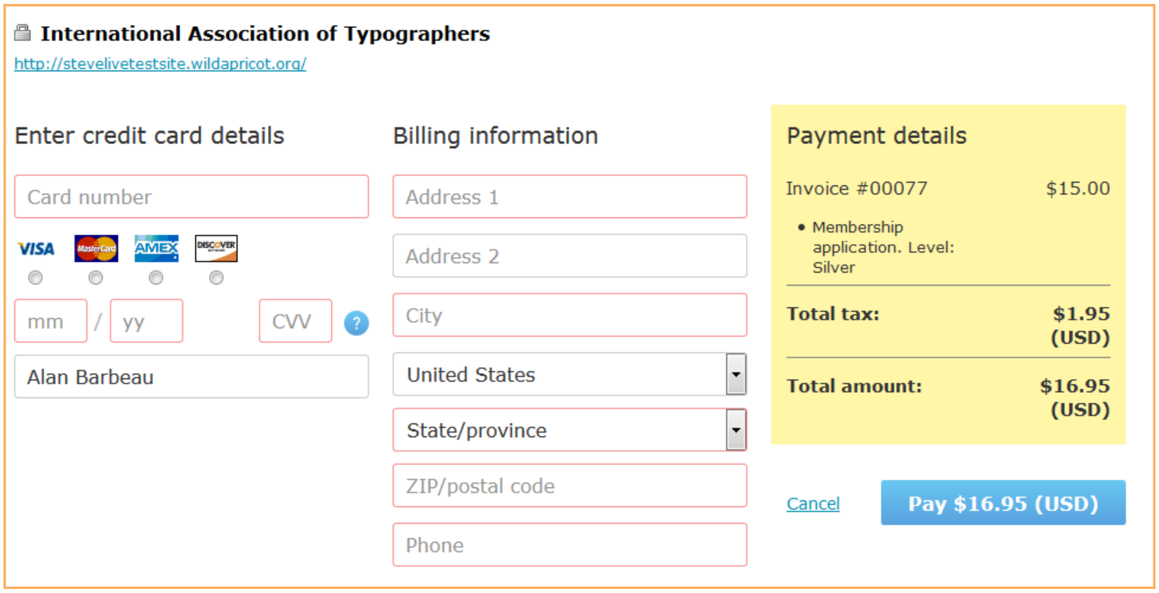
Stripe is an online payment processing service that allows you to accept online credit card payments on your Wild Apricot website. Stripe supports recurring payments (aka subscriptions) and does not require you to set up a merchant account.

Paying using Stripe

Once you've integrated Stripe with your Wild Apricot site, visitors to your site can pay online for membership fees and event registrations, and make donations.

Read more/less

When a visitor fills out an integrated online form on your Wild Apricot website (e.g. membership application or event registration) and chooses to pay online, they will be directed to a secure Wild Apricot payment form to make the payment.



On the form, they fill out their credit card details and their billing information, then click the **Pay** button to complete the payment.

After the payment is processed, the visitor is returned to the Invoices and payments tab on their member profile, where an invoice will appear, along with a payment entry, if the payment was successful.

For security reasons, credit card information is not stored in Wild Apricot. Instead, it is securely transmitted to Stripe where it is processed. Stripe then returns the status of the payment transaction, which is recorded in your Wild Apricot transaction details.

Integrating your Stripe account with Wild Apricot

Instructions for third-party payment systems are provided as a courtesy and may contain out of date information or screen clips. For the latest instructions, consult the payment provider's website.

Before you can set up your Wild Apricot site to accept online payments through Stripe, you must set up a Stripe account.

Within your Stripe account, set your account status to Test if you want to test your Stripe setup on Wild Apricot, or set it to Live if you want to begin accepting payments immediately.

Wild Apricot does not support the use of webhooks with Stripe accounts.

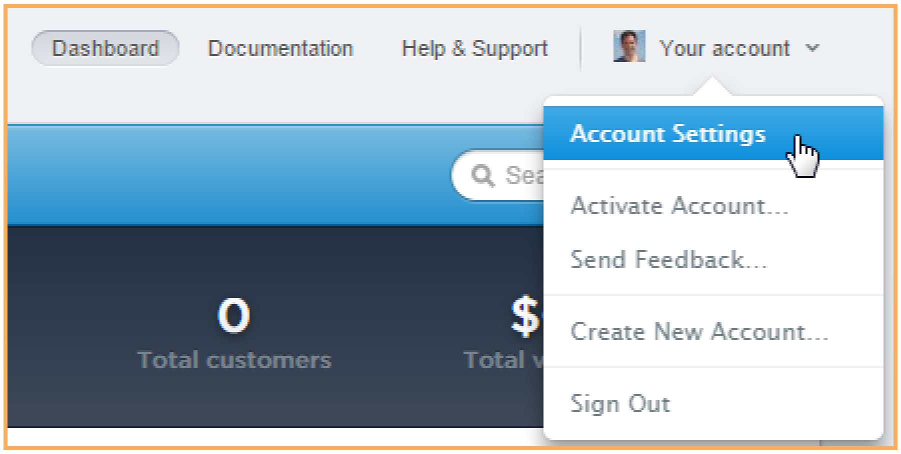
Once you've set up your Stripe account, you can integrate it into your Wild Apricot site.

What you need to get started

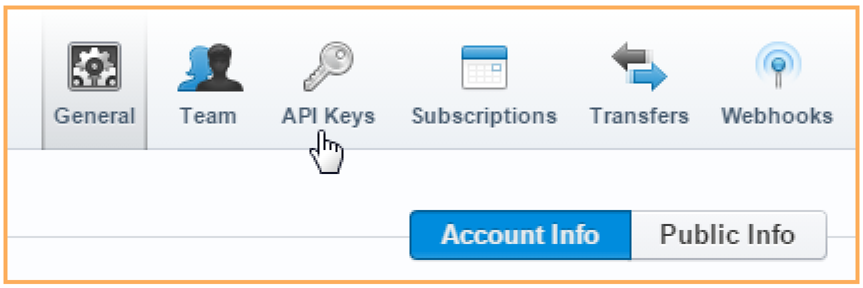
To integrate your Stripe account with Wild Apricot, you will need to copy your secret API key. To find your secret key, follow these steps:

Read more/less

1. Sign into your Stripe account.
2. Click **Your Account** from the upper right corner of your dashboard.
3. Click the **Account settings** option.



4. Click the **API keys** tab.



5. From the API keys page, copy your secret key. If you want to test your Stripe setup, copy the **Test Secret Key**. If you want to accept payments right away, copy the **Live Secret Key**.

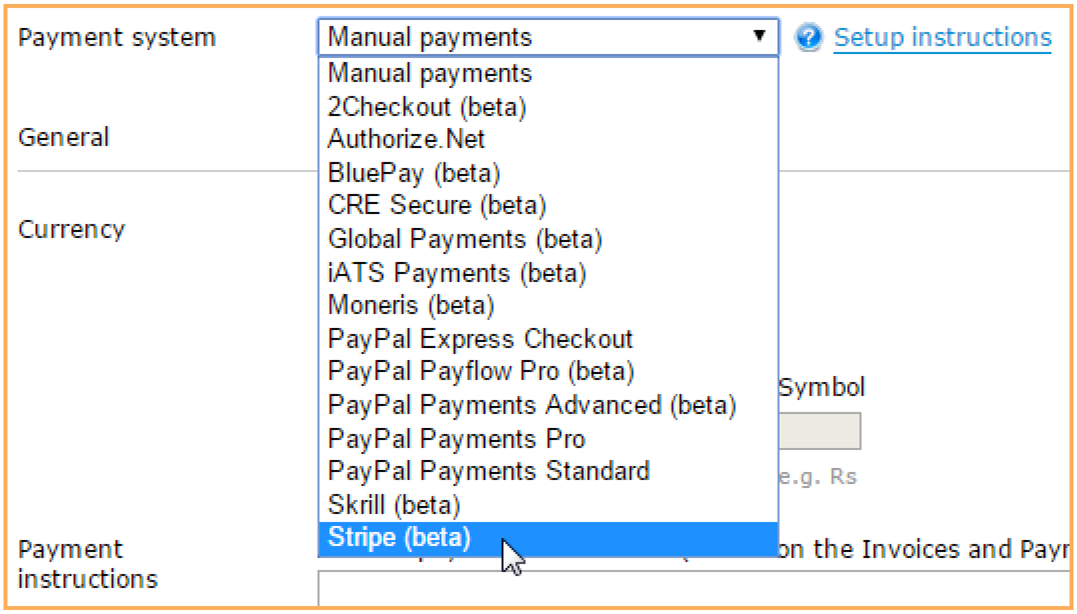
Using the secret key, you can integrate your Stripe account into your Wild Apricot site.

Payment settings for Stripe

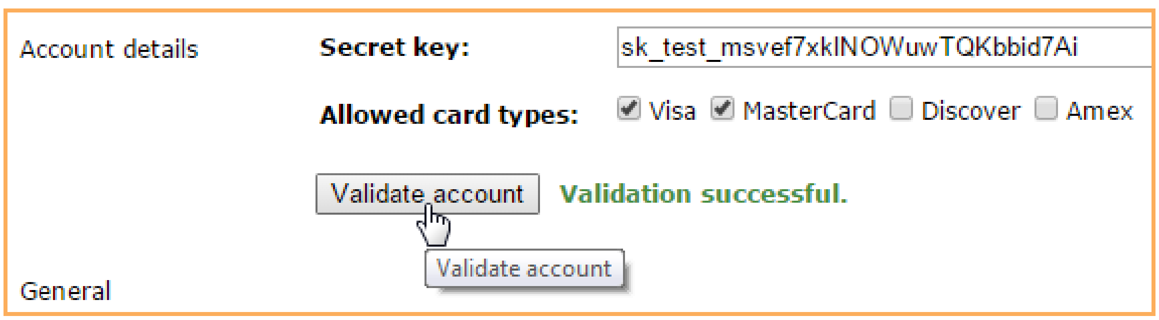
Once you have copied your secret key from your Stripe account, follow these steps to integrate Stripe into your Wild Apricot site:

Read more/less

1. Under the **Settings** menu, click **Finances**.
2. From the **Finances** settings screen, click **Payment settings**.
3. On the **Payment settings** screen, click the **Edit** button.
4. Click the **Payment system** drop-down list and select **Stripe**.



5. If you want to begin accepting online payments immediately, click the **Live** radio button. If you want to test your settings using test credit card numbers provided by Stripe, click the **Test/Sandbox** radio button. While in test mode, your payment provider will accept or decline your test transactions as it would live transactions, but will not charge any credit cards or update any bank accounts. Wild Apricot will, however, create payment records and update Wild Apricot balances as it would with live transactions. For more information, see Live vs. test/sandbox modes.
6. In the **Secret key** field, paste the secret key you copied from your Stripe account.
7. Select the credit card types you want to accept.
8. Click **Validate account** to make sure your Stripe account key is valid.



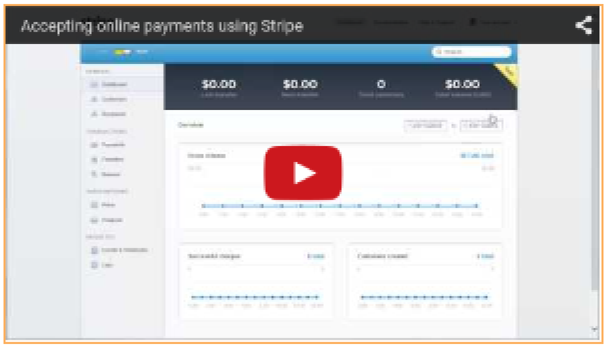
If the account validation fails, check to make sure you entered the account details properly.

9. Click the **Default country** drop-down list and select the country where the majority of your visitors reside. Your selection will appear as the default country to your customers.
10. Select the currency you want to use in your transactions.

> Do not change the currency after your site begins accepting online payments. If you change the currency, existing payment records will not be recalculated and will no longer display correct amounts.

11. In the **Instructions** fields, add payment instructions to be displayed to your customers.
12. Click **Save changes**.

Now that you have set up your Wild Apricot site to receive online payments through Stripe, a **Pay online** button will appear after a visitor to your site clicks the **Confirm** button while applying for membership or registering for an event.



Video: Accepting online payments using Stripe (4:21)

On this page:

- Paying using Stripe
- Integrating your Stripe account with Wild Apricot
    - What you need to get started
    - Payment settings for Stripe

Expand all sections

See also:

- Recurring payments
- Online payments
- Payments overview

Processing credit card payments in admin view

Processing credit card payments in admin view

Depending on which online payment system you are using, administrators can process credit card payments from admin view in Wild Apricot. For example, a member might call you with their credit card details and asks you to renew his or her membership.

Processing of credit card payments by administrators is not supported for PayPal Standard, PayPal Payments Advanced, 2Checkout, and Skrill payment systems.

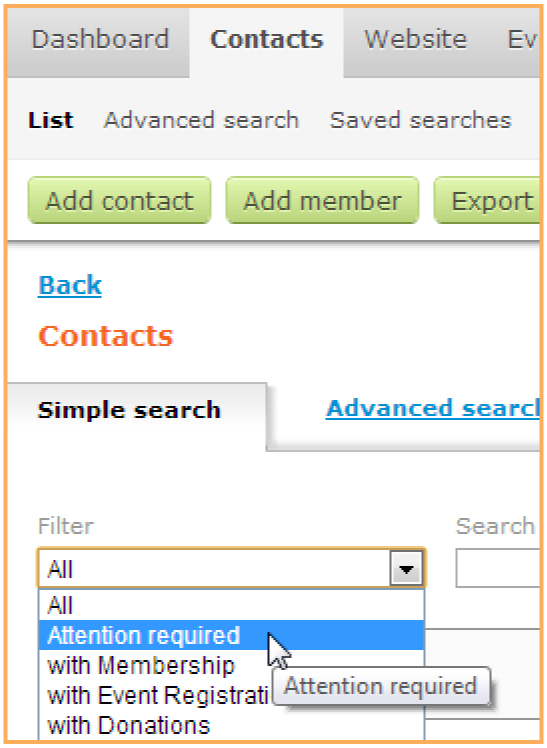
Processing credit card payments using a supported payment system

Administrators can only process credit card payments related to a specific invoice. Payments cannot be charged to an individual's account, only to an invoice.

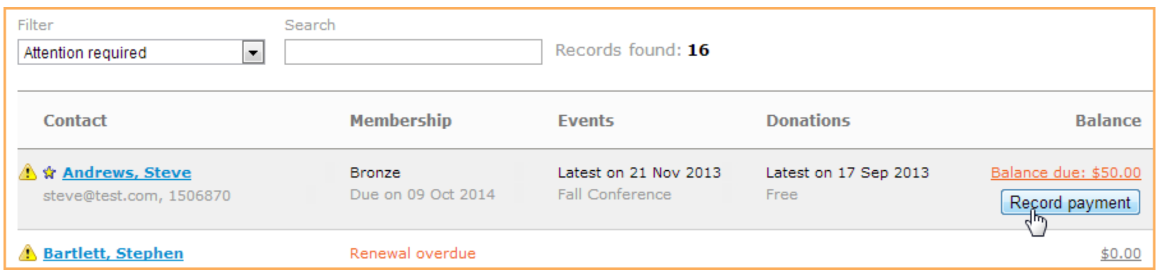
Read more/less

Administrators can process both one-time and recurring payments. Recurring payments will be set up in the member's payment system profile, and Wild Apricot's audit log will display a corresponding entry. For example, setting up a recurring Authorize.Net payment would be recorded in the log as *Authorize.net customer profile for recurring payment created. Profile ID= *******.

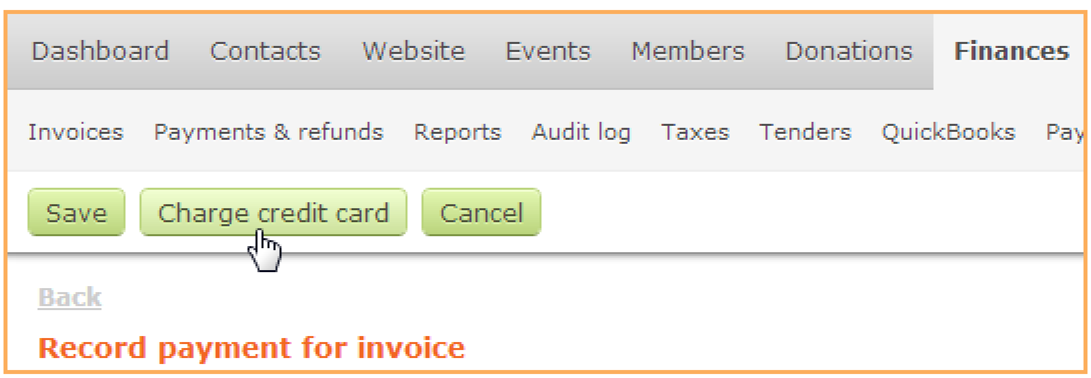
To process a payment related to an invoice, you first have to find the invoice with a balance due. To search for unpaid invoices, click the **List** option under the **Contacts** menu and select **Attention required** from the **Filter** drop-down.



To open the unpaid invoice, click the **Record payment** button.



On the screen that appears, click the **Charge credit card** button.



If the **Charge credit card** button is missing or grayed out, it is because we do not support processing credit card payments by administrators for your online payment system.

On the next screen, enter the credit card details and click the **Pay** button. A confirmation message will appear after the payment has been successfully processed.

Processing credit card payments with an unsupported payment system

If you are not using one of the payment systems that support credit card processing in admin view, there are still a couple of ways an administrator can process a credit card payment for a member.

Read more/less

- Email the invoice to yourself, and then view it online using the **View online** link in the invoice. This will allow you to pay any invoice online without logging in first. For this to work, make sure you include the **View online** link in the invoice (see Customizing invoices and receipts).
- Log into the site as the member and then pay the invoice. If you don't know the member's password, you could always ask the member to give it to you, or you can change it.

On this page:

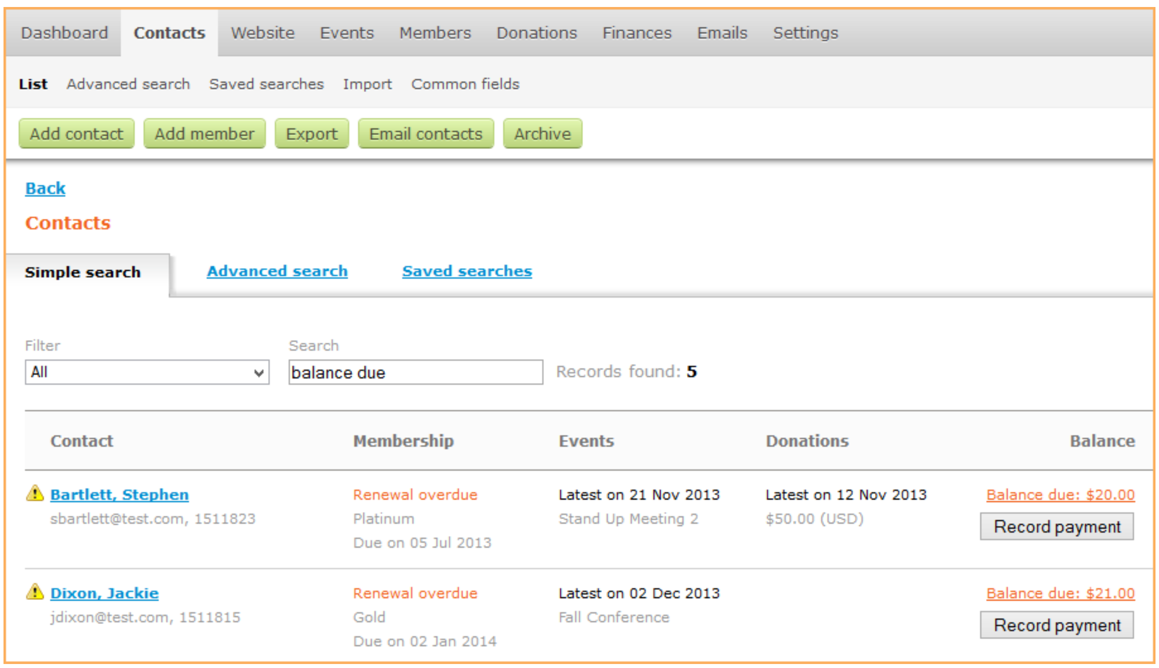
- Processing credit card payments using a supported payment system
- Processing credit card payments with an unsupported payment system

Failed online payments

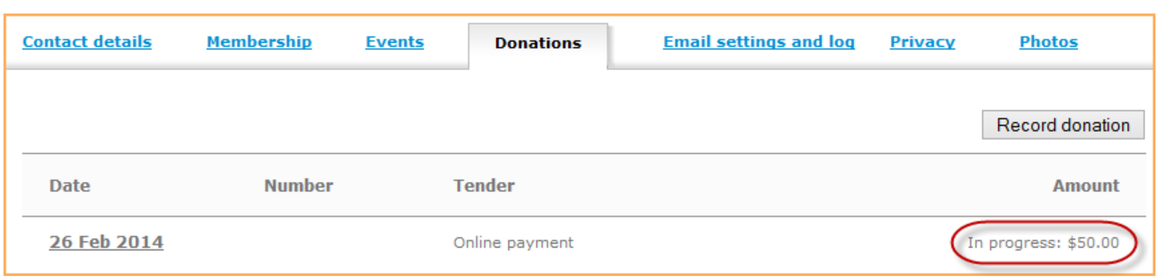
Failed online payments

When visitors to a Wild Apricot site perform self-service transactions – such as applying for membership or registering for an event – an invoice is automatically generated (unless the membership or event is free). If online payments have been enabled for the site, then these invoices – as well as manual invoices created by an administrator – can be paid online from the contact's profile.

Until the invoice is paid, the transaction is shown as unpaid and the record will show a balance due (in the case membership and event transactions).



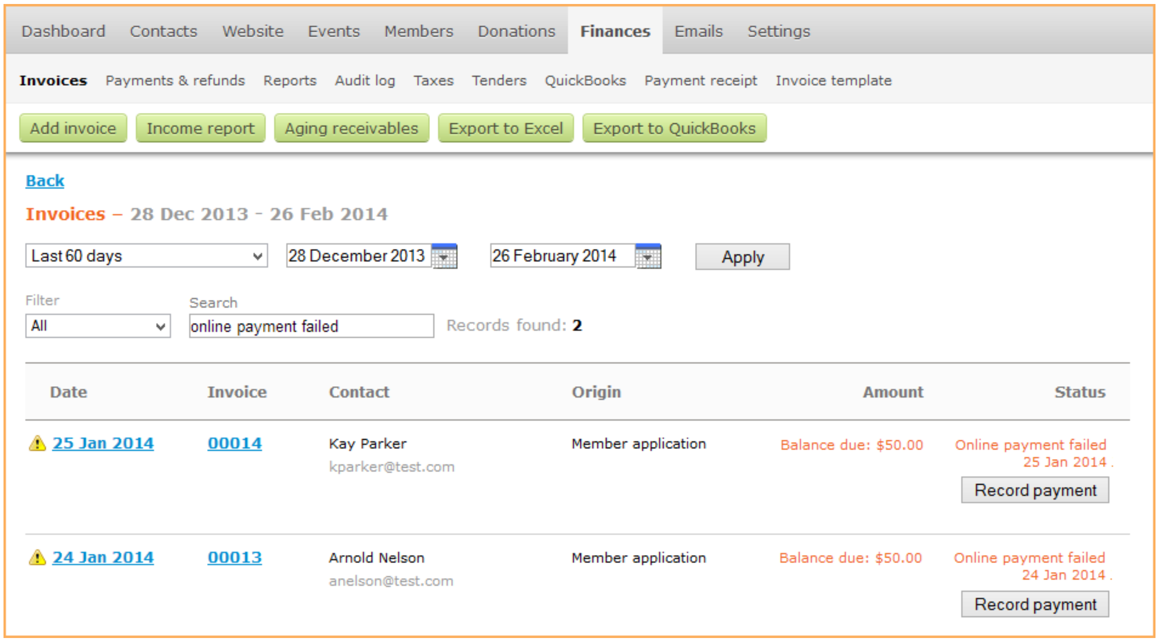
Donations, unlike all other payments, have no associated invoice, so they will appear on the contact's Donations tab as *In progress* until they are confirmed and completed.



When a contact pays online and the payment is successfully processed by payment gateway, a number of records are automatically updated:

- The payment is applied (settled) to its corresponding invoice and a receipt is generated (see Recording payments and credits, and settling invoices)
- If the payment is for a member, the membership details are updated according to your membership level settings
- If the payment is for an event registration, the registration status is marked as completed

However, when a contact attempts to pay online and the payment is rejected, the invoice is given an *Online payment failed* status.



If the payment is for a membership fee, event fee, or a manual invoice, the contact can just log in and try again to pay for these unpaid invoices. Alternatively, you can arrange a manual payment method, such as cheque. In this case, you would manually record the payment once it is received.

In some cases, a contact may forget about or choose not to complete a transaction. In the case of membership and event payments, the invoice will indefinitely appear as *Unpaid*. For donations, the invoice will be marked *In progress* for 24 hours, and after that, it will be automatically marked *Probably abandoned*.

If you don't believe a transaction is likely to be completed, you can delete the original transaction, which will result in the invoice being automatically deleted.

There is also a possibility (although very rare) that a person has in fact completed payment, but due to a technical malfunction, this was not recorded in the Wild Apricot system. In this case, the only resolution is for the person to contact you and report the problem. Once you investigate this and confirm that payment has indeed been received to your merchant account, you can find the transaction in question and manually record the payment on the invoice.

> ⓘ You can also check the audit log for more information on the payment.

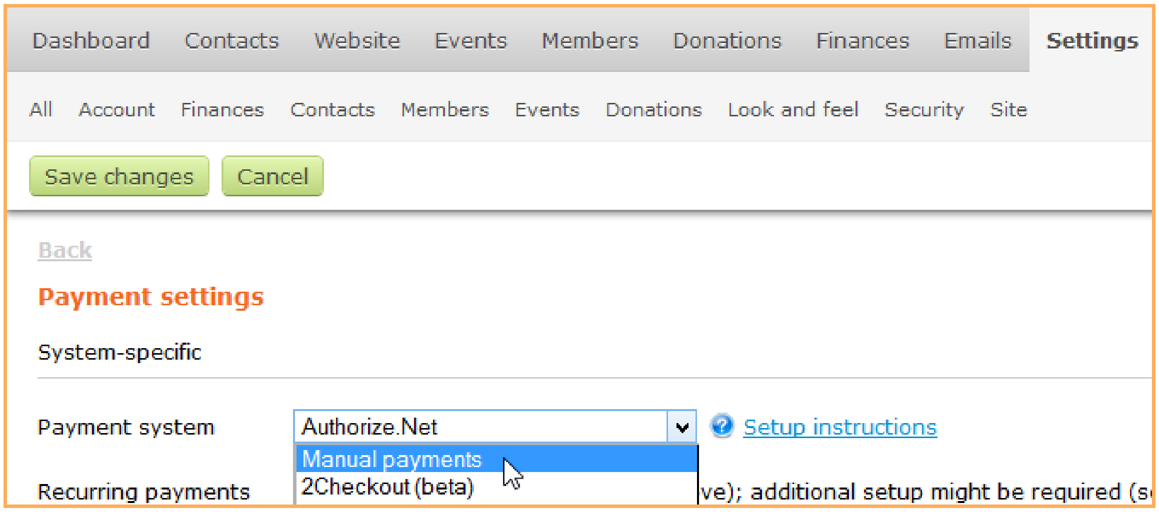
Manual payments

Manual payments

On the **Payment settings** screen, you indicate how your organization accepts payments. You can choose to process payments using an online payment system , to only handle payments manually, or to accept both manual and online payments. Manual payments – aka offline payments – are payments received outside of Wild Apricot, such as check, cash, wire transfer, or credit card payments received outside of your Wild Apricot site.

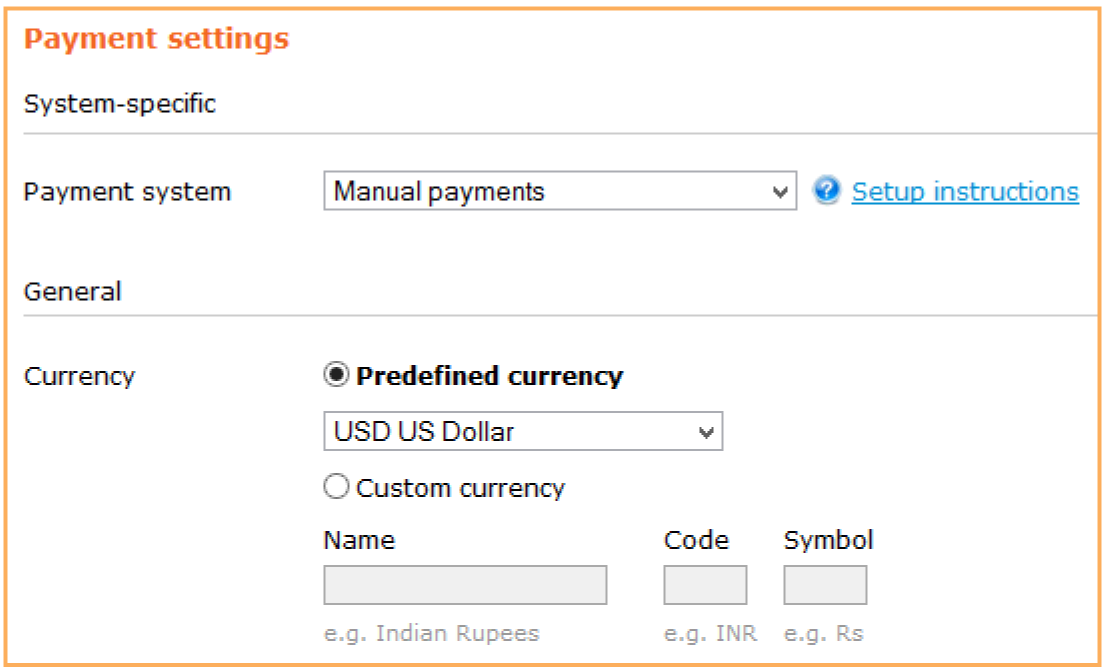
To display the **Payment settings** screen, click **Finances** under the **Settings** menu, then click **Payment settings**.

If you don't want to accept online payments, you can click the **Payment system** drop-down and select the **Manual payments** option.



With manual payments selected, you can only manually record offline payments. To accept both online and manual payments, set up your online payment system – you will still be able to record manual payments.

You must choose the default country you want to display to customers, and the currency you want to use in your transactions (and in your reports). You can choose a predefined currency or enter your own custom currency. If you enter your own custom currency, you must specify the currency name, code, and symbol.



You should also provide payments instructions so that your customers understand your manual payment procedure, since Wild Apricot will only generate an invoice when manual payment is the selected payment system.

See also:

- Recording payments and credits, and settling invoices

Recurring payments

Recurring payments

You can set up recurring payments – aka preauthorized payments or subscriptions – so that membership dues can be automatically charged on a regular schedule. This saves your members the trouble of having to manually renew their membership.

ⓘ Recurring payments are available only for membership fees (not for events or donations), and only for Community plans and higher (see Functionality by billing plan).

After you've configured your payment settings, you can enable recurring payments for individual membership levels.

If recurring payments are enabled for a particular membership level, then members paying online for that membership level will not have any option other than agreeing to recurring payments. You can, however, set up another similar membership level without recurring payments enabled to accommodate members who do not want to consent to recurring payments.

Recurring payments are currently supported for the following payment systems:

- Authorize.Net
- Moneris
- PayPal Express Checkout
- PayPal Payflow Pro
- PayPal Payments Pro
- PayPal Payments Standard
- Stripe

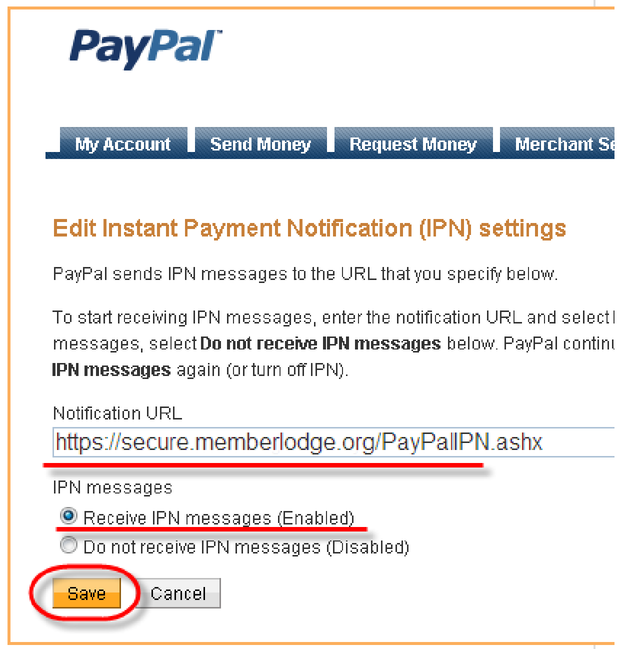
Setting up recurring payments

To set up recurring payments with one of the supported payment systems, follow these steps:

1. Set up an account

Set up an account with one of the supported payment systems.
Read more/less

If you choose...	Then...
Authorize.Net	Subscribe to their Customer Information Manager (CIM) service.
Moneris	Enable the Vault feature for your store.
PayPal Payflow Pro	Subscribe to the Recurring Billing service.
PayPal Payments Pro	Subscribe to the Recurring Payments service. If you do not subscribe to this service, members can only pay for recurring memberships using the **PayPal Express Checkout** button. Any attempts to pay using the **Pay with credit card** option will fail.
PayPal Payments Standard or Express Checkout	Membership applicants for levels with recurring payments must have a PayPal account – they can't pay with a credit card without creating a PayPal account first (a limitation of the PayPal Payments Standard system).

any PayPal payment system	You must have a PayPal Business account, and must enable instant payment notification (IPN) in your PayPal account. To enable IPN: 1. Click the **Profile** tab under **My Account**. 2. Click **My selling tools**. 3. Click **Update** beside **Instant payment notifications** under **Getting paid and managing my risks**. 4. Click the **Choose IPN settings** button. 5. Enter the following in the **Notification URL** field: `https://secure.memberlodge.org/PayPalIPN.ashx` 6. Click **Receive IPN messages (Enabled)**.  7. Click **Save**.
Stripe	Proceed with configuring your payment settings on Wild Apricot

2. Configure your payment settings

Once you have an account set up, follow the appropriate set of instructions below to configure your payment settings for your payment system.

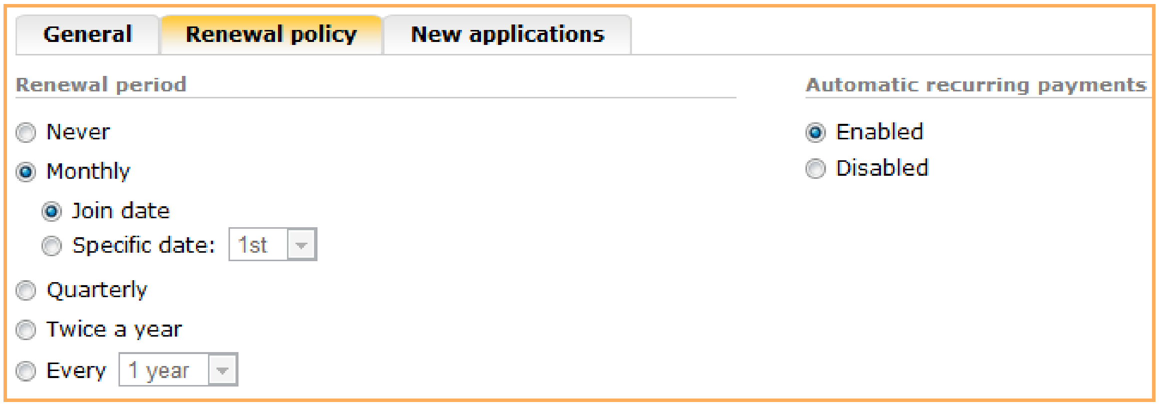
Read more/less

- Payment settings for Authorize.Net
- Payment settings for Moneris
- Payment settings for PayPal Express Checkout
- Payment settings for PayPal Payflow Pro
- Payment settings for PayPal Payments Standard
- Payment settings for Stripe

3. Enable recurring payments for membership level(s)

After you have configured your payment settings, go to the **Renewal policy** page for the appropriate membership level (by clicking **Levels** under the **Members** menu) and select a **Renewal period** (if one is not already selected), then enable the **Automatic recurring payments** option.

Read more/less



Repeat for each appropriate membership level then Click **Save**.

If you choose a specific date rather than the join date for a renewal period, new members will be billed the full membership fee for the period between the join date and the first renewal date. You can enable prorating of membership fees for levels with automatic recurring payments only if you are using Authorize.Net, Moneris, or Stripe as your payment system.

> Recurring payments are not supported for renewal periods greater than 1 year.

PayPal and trial periods

If your site is using PayPal Payments Standard, the membership fee for the period between the join date and the first renewal date may be split into multiple charges billed as *trial periods* by PayPal.

Read more/less

For example, if somebody applies for a $10 membership on February 18th and renewal settings of membership level are set to **Monthly > Specific date > 15th** (of every month), PayPal will create a subscription with the following parameters:

- "trial period" from February 18th to March 15th at a cost of $10
- monthly regular payments of $10 starting on March 15th

PayPal's trial period has two limitations:

- if you are using days as the basis for your trial period, they cannot exceed 90. After that you will have to use months.
- if there are two trial periods where the first period is not free, then the second trial period must also not be free.

If the recurring start date is a long time off, PayPal will create two trial periods. For example, if the membership costs $100 and is renewed annually on the 1st of January, then member who subscribed on February 15th will have the following subscription records:

- first "trial period" for 10 months until December 15th for $99.99
- second "trial period" from December 16th to December 31 for $0.01
- annual regular subscription payments of $100 starting on January 1st

> You might consider switching to PayPal Express Checkout, PayPal Payflow Pro, or Authorize.Net to avoid these issues.

Changing recurring payments

After you've set up recurring payments for membership levels, a member may want to cancel recurring payments or change membership levels. You, as a site administrator, might want change a level's membership fee or renewal policy.

The sections below describe how these changes are handled.

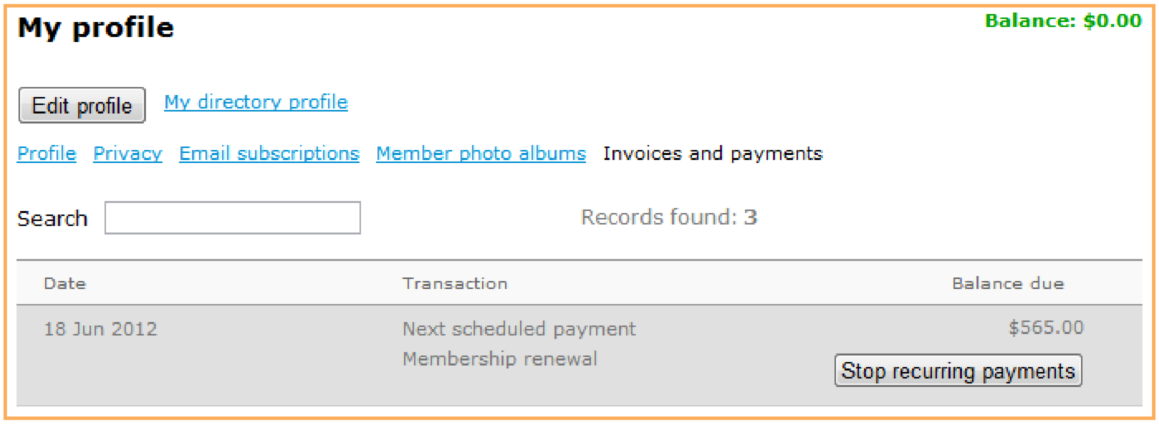
Cancelling recurring payments

Depending on how the member pays for their membership, the member can cancel recurring payments either from their member profile or from their PayPal profile. A Wild Apricot site administrator can also cancel a recurring payment, either from Wild Apricot or from their payment system account.

Read more/less

By members who pay with a credit card

Members who pay for their membership by credit card can stop recurring payments from their Wild Apricot member profile page. To do so, they would click the **Invoices and payments** tab in their profile then click **Stop recurring payments** button beside the membership renewal transaction.



The member will be asked to confirm their request.

Applies to: *PayPal Express Checkout, PayPal Payflow Pro, Authorize.Net, Moneris, Stripe*

By members who pay via PayPal

Members who pay for their membership using a PayPal account can stop recurring payments from their PayPal account by cancelling the subscription. To cancel the subscription, they:

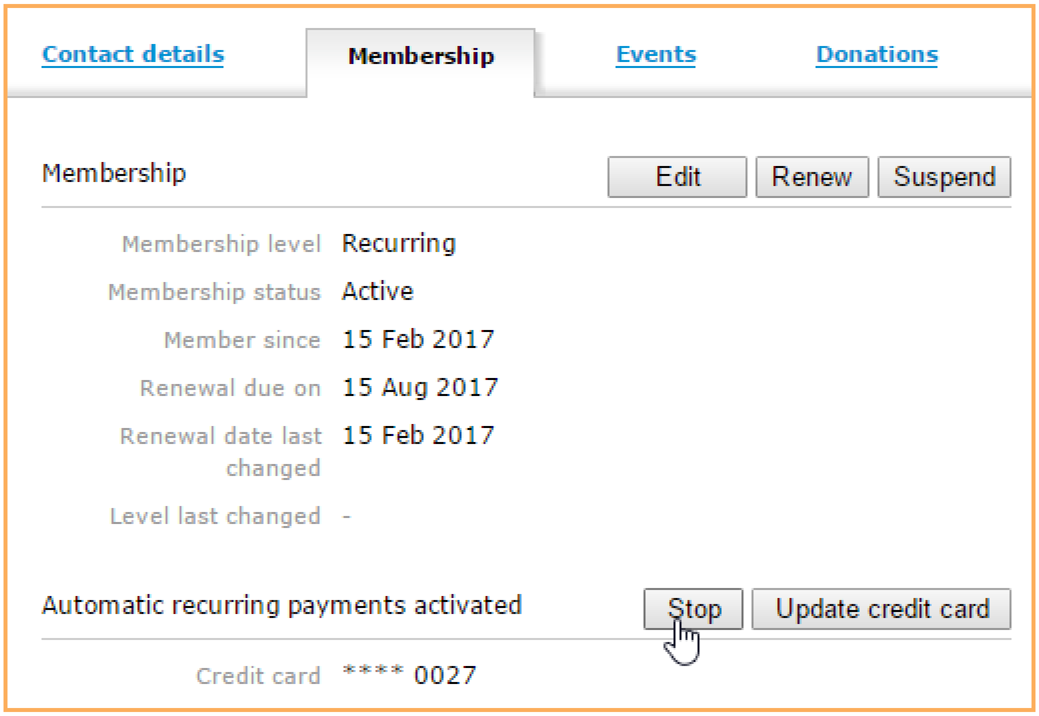
1. Log in to their PayPal account.
2. Click **Profile** near the top of the page.
3. Click **My money**.
4. Click **Update** in the **My preapproved payments** section.
5. Click **Cancel** or **Cancel automatic billing** and follow the instructions.

If the member paid using their PayPal account via PayPal Express Checkout, they can also cancel the recurring payment from their Wild Apricot member profile.

Applies to: *PayPal Standard, PayPal Express Checkout, PayPal Payflow Pro*

By Wild Apricot administrators

If your site uses PayPal Express Checkout, Authorize.Net, Moneris, or Stripe, you can stop recurring payments from the member's membership details. On the **Membership** tab, click the **Stop** button. You will be asked to confirm your request.



You can also stop the recurring payment from your organization's PayPal, Authorize.Net, Moneris, or Stripe account.

If your site uses PayPal Standard, you can only stop the recurring payment from your organization's PayPal account.

Cancelling a recurring payment does not affect the member's membership status.

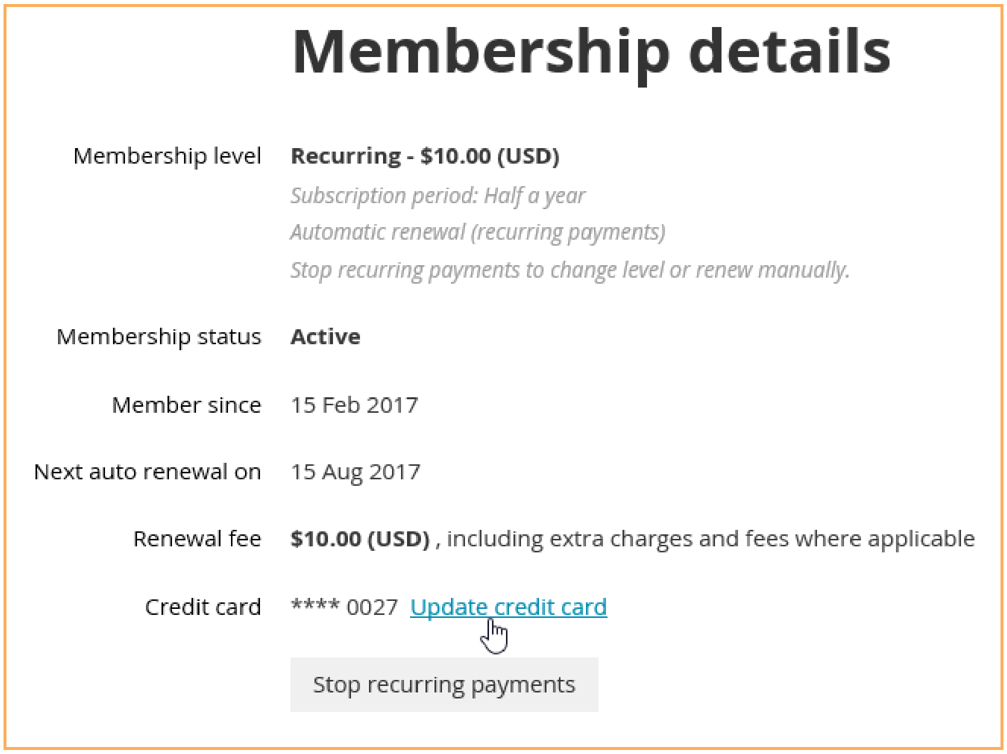
Changing credit card information

Members paying via PayPal Payflow Pro, Authorize.Net, Moneris, or Stripe for their recurring membership fees can change their credit card information from their member profile. Members paying via PayPal Express Checkout, PayPal Payments Standard, or PayPal Payments Pro need to update the credit card information on their PayPal profile.

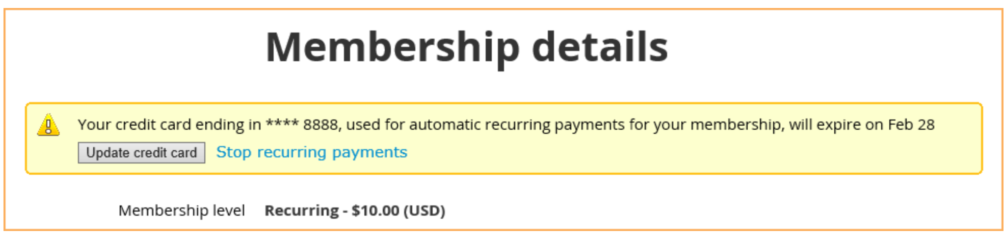
Administrators can update the credit card details from the **Membership** tab of the member's contact record.

Read more/less

For members paying via PayPal Payflow Pro, Authorize.Net, Moneris, or Stripe for recurring payments, an **Update credit card** link will appear on their member profile under the **Membership details** heading.



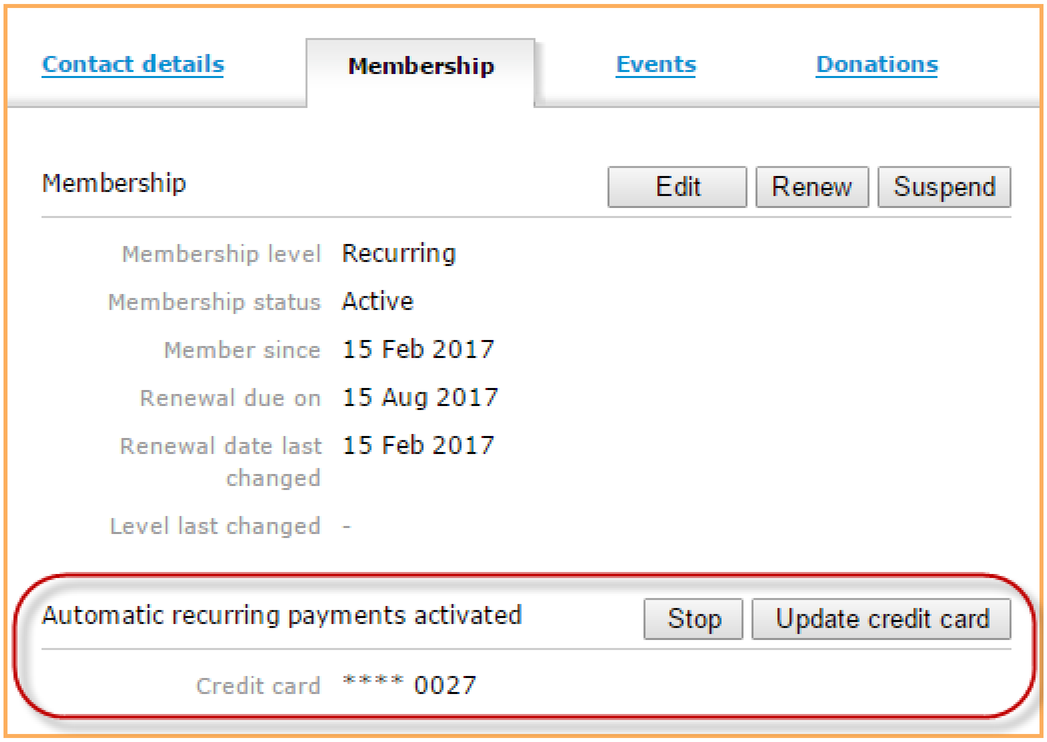
Clicking this link will allow them to update their credit card details. If their existing credit card is within 2 weeks of expiry, an **Update credit card** button will appear within a yellow warning box at the top of the **Membership details** section.



If their credit card has already expired, the button will appear within a red warning box.

Emails will be automatically sent to members when their credit card is 2 weeks from expiry, and when the card actually expires. You can control the delivery of these emails from the Renewal notifications section on the **Renewal policy** tab for each membership level.

Administrators can update credit card information for members paying via PayPal Payflow Pro, Authorize.Net, Moneris, or Stripe by clicking the **Update credit card** button on the **Membership** tab of the member's contact record.



You could also update their credit card information from their recurring profile on your payment system account.

Changing a member's membership level

If a member upgrades to a membership level with recurring payments enabled, they will follow the recurring payment process as a new member would. If a member who is currently set up to make recurring payments changes membership levels, the effect of the change depends on which payment system your site is using.

Read more/less

Using Authorize.Net, Moneris, or Stripe

Any changes to membership level will be automatically reflected in the membership fee charged to the member.

Using PayPal

A change to membership level will not have any effect on the member's recurring subscription. To change the level, you must **first** cancel the member's recurring subscription on PayPal then change the membership level as required.

Changing membership fees

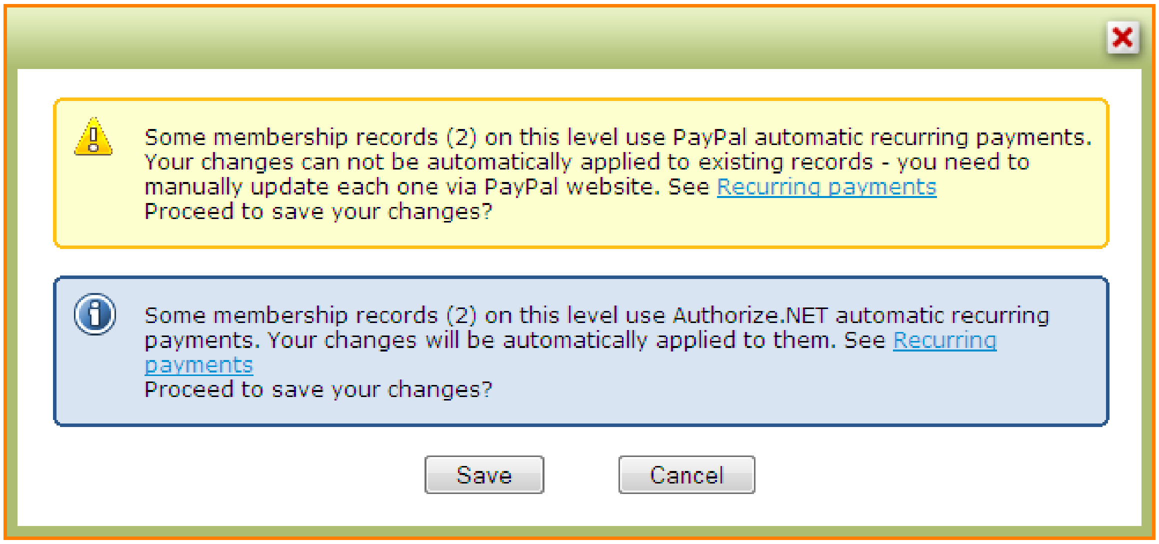
The effect of changing the membership fees for a level with recurring payments depends on which payment system you are using.

Using Authorize.Net, Moneris, or Stripe

If you change the membership fee for a level with recurring payments enabled, the change will affect existing members who will be charged the new fee on their next schedule payment date.

Using PayPal

If you change the membership fee for a level with recurring payments enabled, members will continue to be charged the old rates according to the existing PayPal payment profile, but will be invoiced the new amount within Wild Apricot, leading to future renewal invoices being under or overpaid. You'll have to manually update each member's recurring payments profile through your organization's PayPal account. A message will be displayed when a change like this takes place.



(For instructions on updating recurring payment subscriptions for your customers from your organization's PayPal account, click here.)

Changing the renewal period

The effect of changing the renewal period for a level with recurring payments also depends on which payment system you are using.

Using Authorize.Net, Moneris, or Stripe

If you change the renewal period for a level with recurring payments enabled, the change will be applied to existing members. The renewal date will be shifted according to the current renewal settings.

Using PayPal

When you change the renewal period for a level with recurring payments enabled, the change will **not** affect existing members. If you want to change the renewal period for existing members, you have to make the change manually to each member record in Wild Apricot, and separately update each recurring payment profile in PayPal. Otherwise, the recurring payments will continue to take place as originally scheduled.

Enabling/disabling recurring payments for existing level

Any existing membership level can be changed to enable recurring payments. The next time a member renews their membership, they will follow the recurring payment process as a new member would.

Click/tap to expand/collapse

If you change a membership level to disable recurring payments, the effect will depend on the payment system your site uses. If you are using Authorize.Net, Moneris, PayPal Payflow Pro, PayPal Payments Pro, PayPal Express Checkout, or Stripe, the payments will be automatically cancelled for existing members. If you are using PayPal Payments Standard, you must cancel the recurring subscription for each member on PayPal.

Payment failures

If a recurring payment is not successfully processed, it will be retried, up to a specific number of attempts. The number of attempts depends on the payment system your site uses.

Read more/less

Payment system	Total # of attempts	Configurable?
Authorize.Net	10 (1 attempt every 6 hours)	No
Moneris	10 (1 attempt every 6 hours)	No
PayPal Payments Standard, PayPal Express Checkout	3 (2nd after 3 days, 3rd after another 5 days)	Yes, for each recurring profile from PayPal Manager
PayPal Payflow Pro	3 over 3 consecutive days	Yes, for each recurring profile from PayPal Manager

Stripe	4 (3, 5, and 7 days after 1st attempt)	Yes, from the **Subscriptions** tab of your account settings

If the recurring payment is still unsuccessful after the total number of attempts, the member's recurring payment profile (or subscription, in the case of Stripe) will be deleted, except for PayPal Payments Standard. For PayPal Payments Standard, an administrator can manually change or delete the recurring payment profile. (The recurring payment profile contains information about the recurring payments, including the regular payment period. Deleting the profile cancels the recurring payment.)

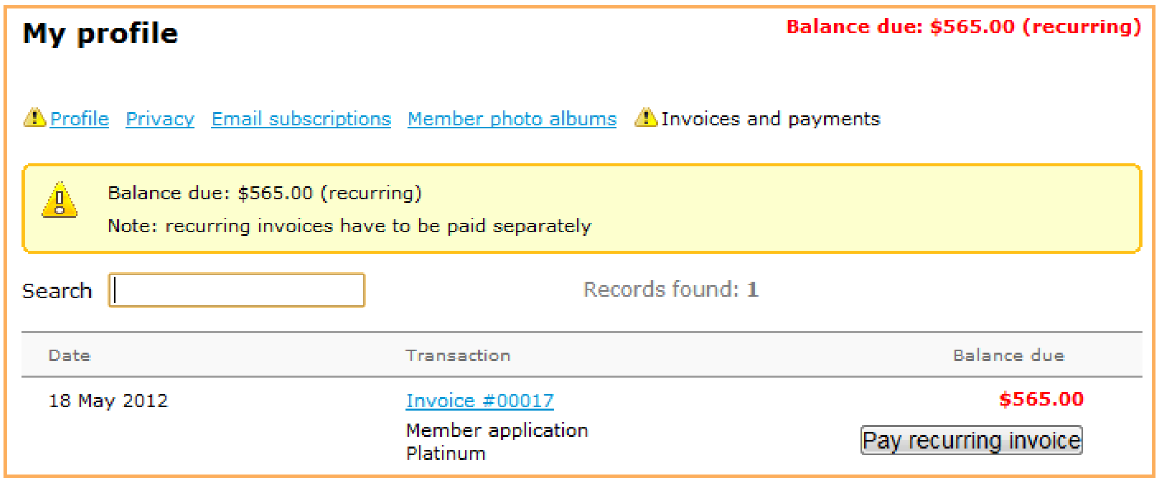
The profile deletion will be recorded in the audit log.

An *Recurring renewal failed* email will be automatically sent to the member and the organization contact, unless you have disabled these emails from the Renewal policy tab.

Paying for a membership with recurring payments enabled

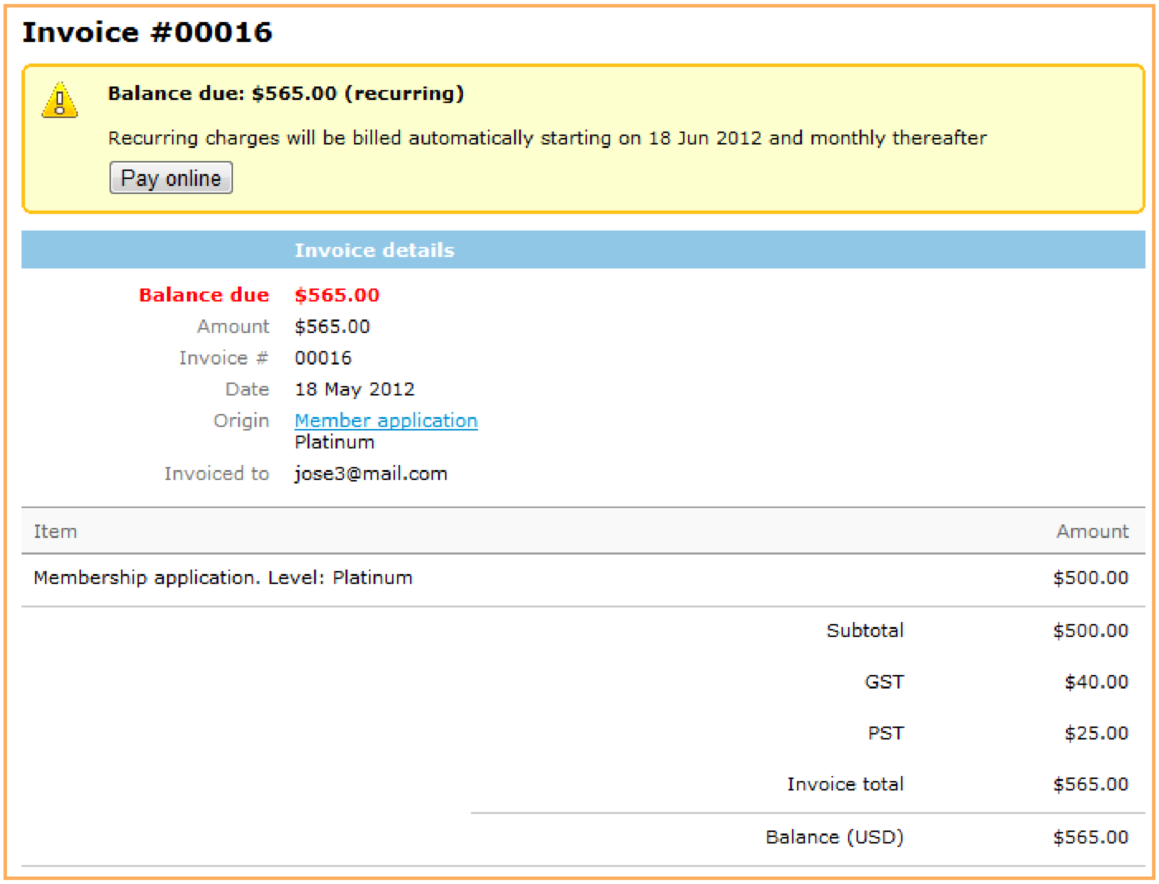
When a membership applicant selects a membership level with recurring payments enabled then clicks **Confirm**, a **Pay recurring invoice** button will appear instead of a **Pay online** button.

Read more/less



Recurring invoices have to be paid separately from other invoices.

When the applicant clicks the **Pay recurring invoice** button, a detailed invoice appears.



Discount coupons cannot be used with recurring payments.

To complete the payment, the applicant now clicks **Pay online**.

If you're using PayPal Payments Pro, the applicant will have the choice of clicking the **Pay with credit card** button or the **PayPal Express Checkout** button.

After completing the payment, the applicant will see a confirmation message. When subsequent payments are processed, the member will be emailed a payment receipt. For instructions on customizing payment receipts, see Customizing invoices and receipts.

Recurring payments can also be set up by an administrator. Doing so will update the member's payment system profile, and generate an entry in Wild Apricot's audit log. For example, setting up a recurring Authorize.Net payment would be recorded in the log as *Authorize.net customer profile for recurring payment created. Profile ID= ******. For more information, see Processing credit card payments in admin view.

Extra charges

If you're using Authorize.Net

If you're using Authorize.Net, Moneris, or Stripe to process payments, any extra charges will be included in subsequent payments only if you enabled the **Include in renewals** option for the extra charge field in your membership fields.

If you're using PayPal

If you're using PayPal, extra charges applied during the initial transaction will also be included in each subsequent payment even if you disable the **Include in renewals** option. If you do disable this option, the invoice amount for the recurring membership renewal will be different from the payment amount, resulting in an overpaid balance that will increase with each additional payment.

On this page:

Expand all sections

Recording payments and credits, and settling invoices

Recording payments and credits, and settling invoices

Settling invoices is the process of matching payments with invoices. A payment can be a full payment on an invoice, a partial payment, or a payment for several invoices. Payments can also be applied *on account* – recorded for a contact, then manually settled to outstanding invoices later.

There are two types of payments recorded in Wild Apricot: online payments, such as credit card payments, and manual or offline payments, for payments via check, cash, wire transfer, or other means.

When a person pays online, Wild Apricot automatically records the payment and settles it with the related invoice. If an invoice is paid manually, the payment must be recorded manually and then manually settled to one or more open invoices.

All payments, including payments recorded manually, will be reflected on the Invoices and payments page of the contact's profile.

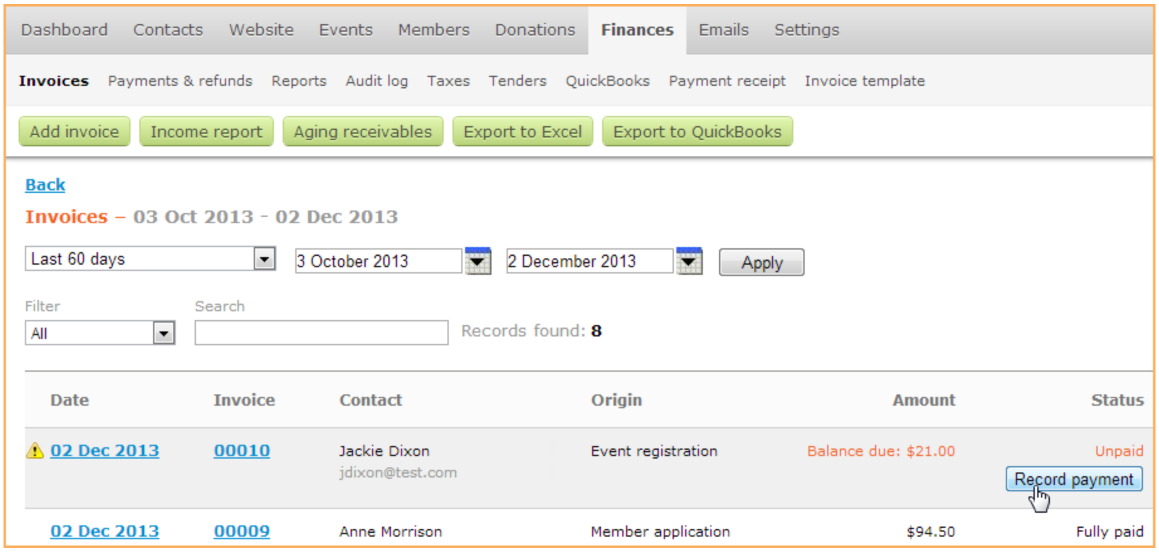
> Donations are recorded slightly differently. For more information, see Managing donations.

Recording a payment for a particular invoice

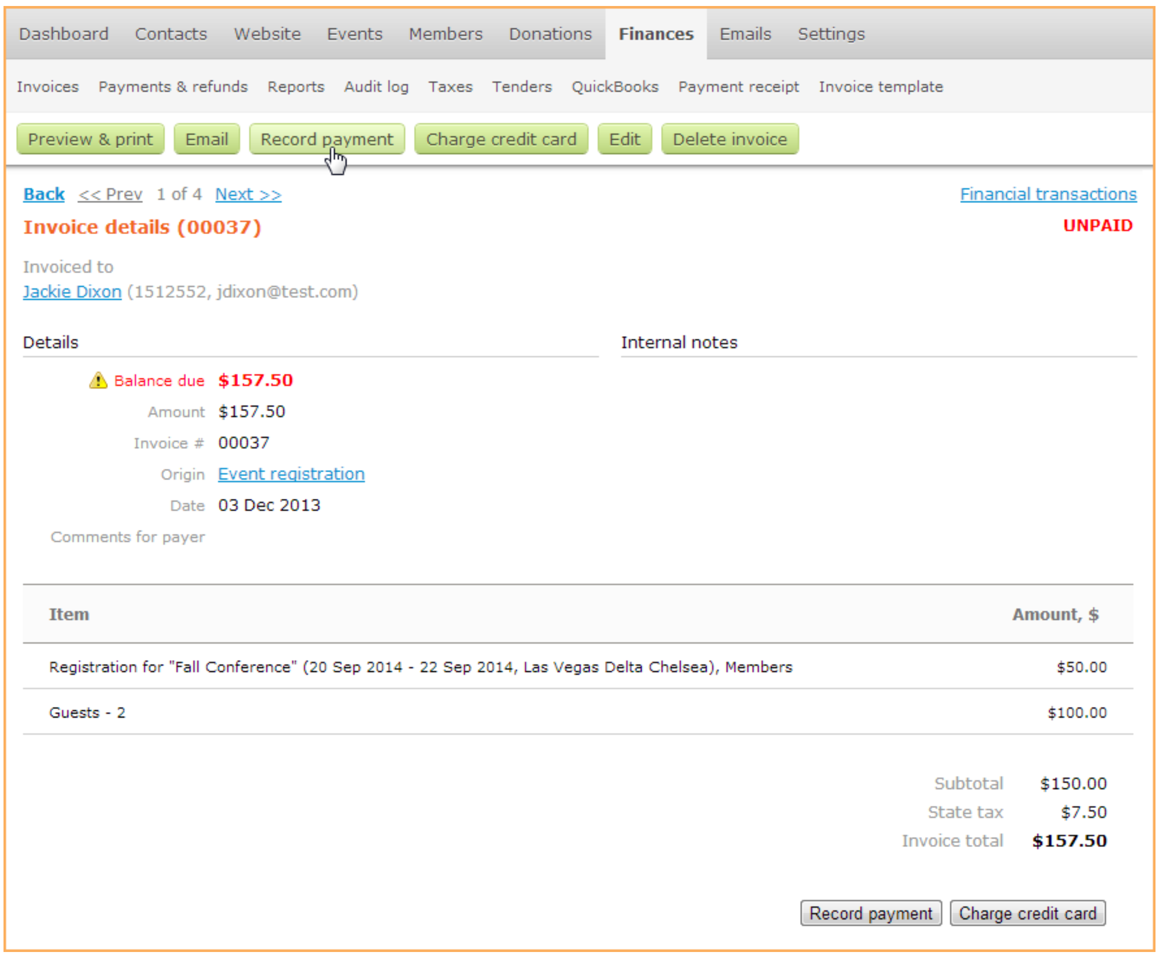
To record a manual or offline payment for a particular invoice, find the invoice with the outstanding balance then click the **Record Payment** button.

Read more/less

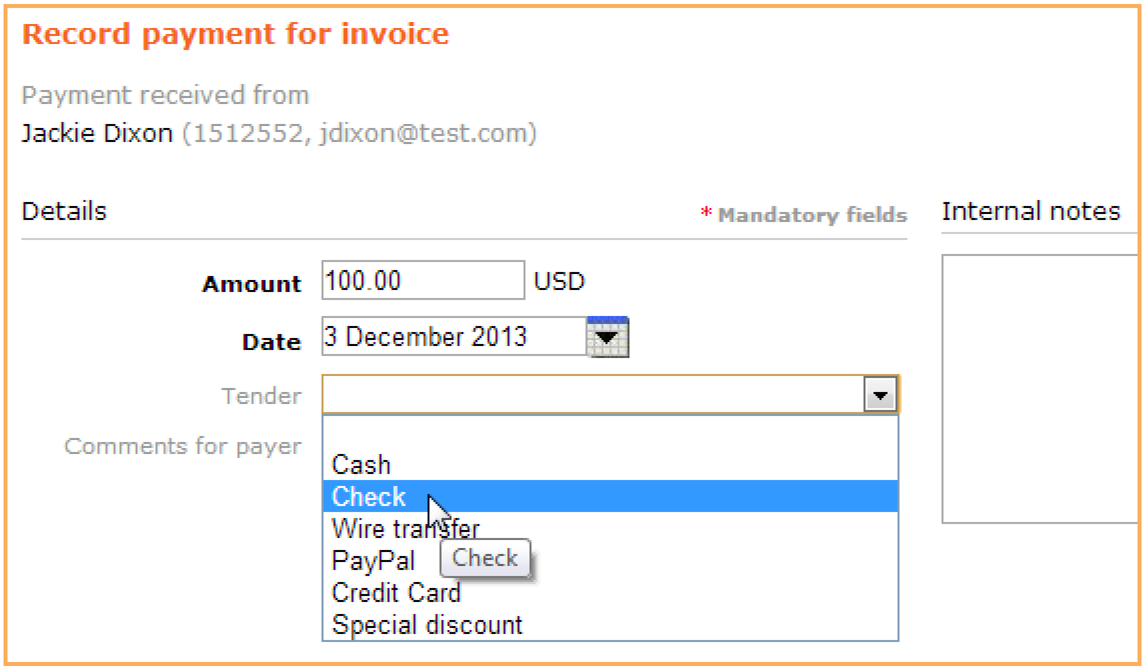
The **Record Payment** button appears beside open invoices in the invoices list...



...and on the **Invoice details** screen.



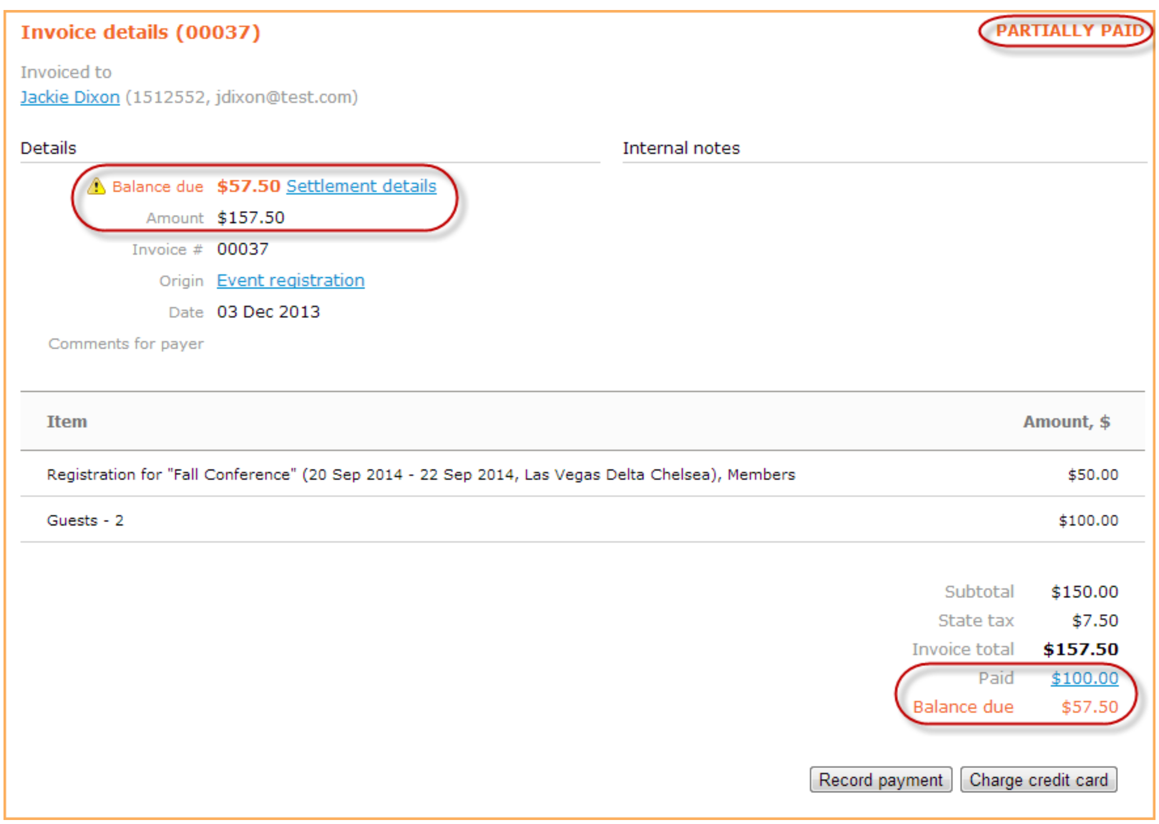
After you click the **Record payment** button, you enter the amount of the payment and the date of the payment, and select the payment tender.



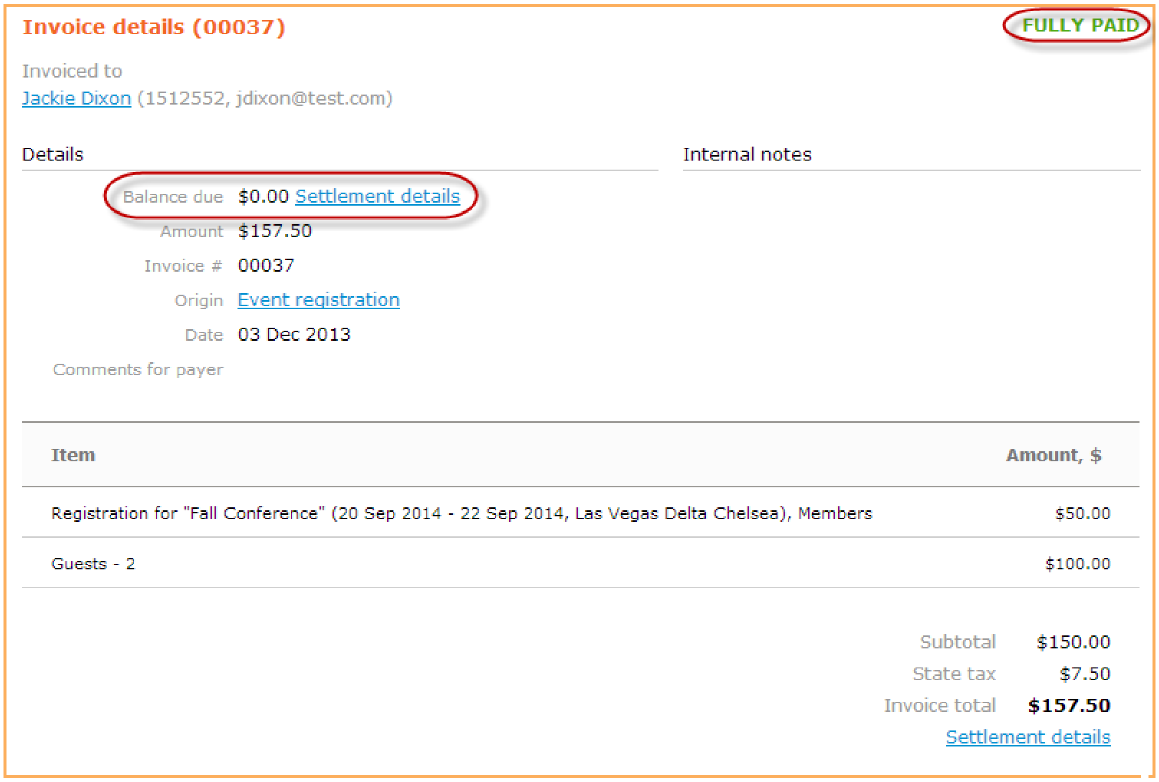
The payment amount must be equal to or less than the invoice amount. The payment tender indicates how the payment was received. Classifying payments by tender makes reconciliation and reporting easier. The payment report, for example, displays a summary of payments broken down by tender. For online payments, the tender is recorded automatically (e.g. *Online - Authorize.Net credit card payment*).

After you click the **Save** button, the payment amount will be settled against the invoice, and invoice and contact balances are updated accordingly.

If the payment was less than the outstanding invoice balance, then the invoice will be marked as partially paid.



If the payment was for the entire outstanding balance of the invoice, then the invoice will be marked as fully paid.



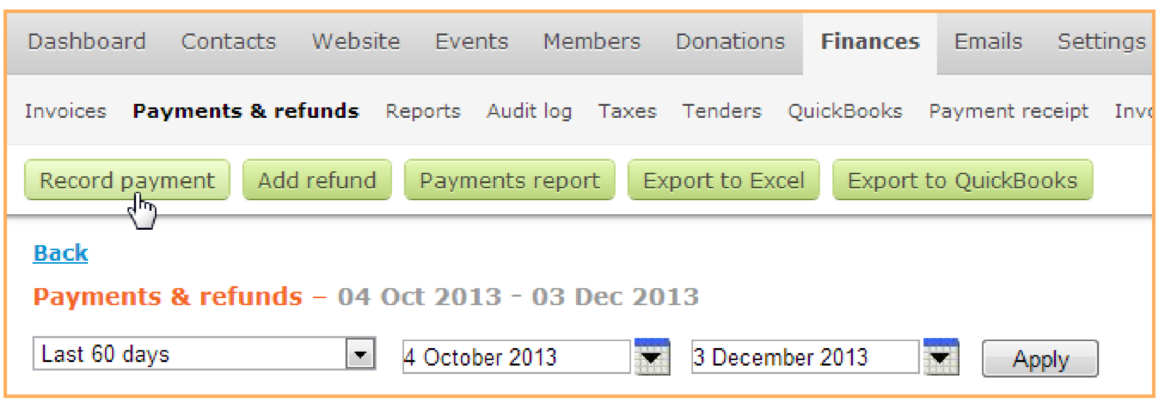
Recording credits or payments on account

Credits and payments on account are both recorded as payments made by a contact. Once recorded, the payments can be applied towards future invoices.

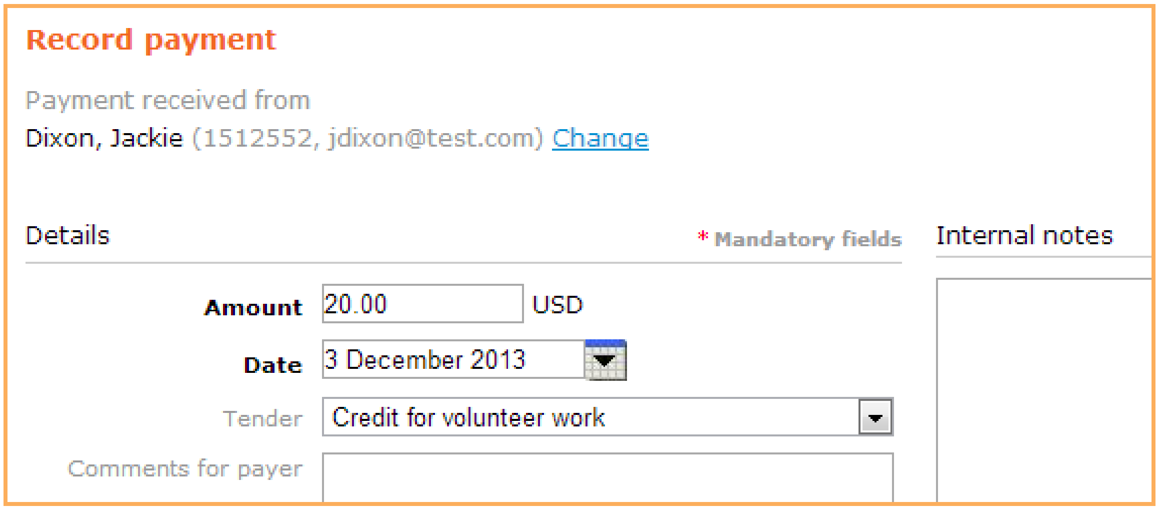
Read more/less

You can also provide discounts which reduce or eliminate the invoice balance rather than apply a credit towards the full invoice. Discounts can be set up for selected event registration types and membership levels, or manually applied to specific invoices.

To record a credit on account, you record the payment without first selecting an invoice. To record a payment without applying it to an invoice, hover over the **Finances** menu and select the **Payments & refunds** option. From the **Payments & refunds** screen, click the **Re cord payment** button.

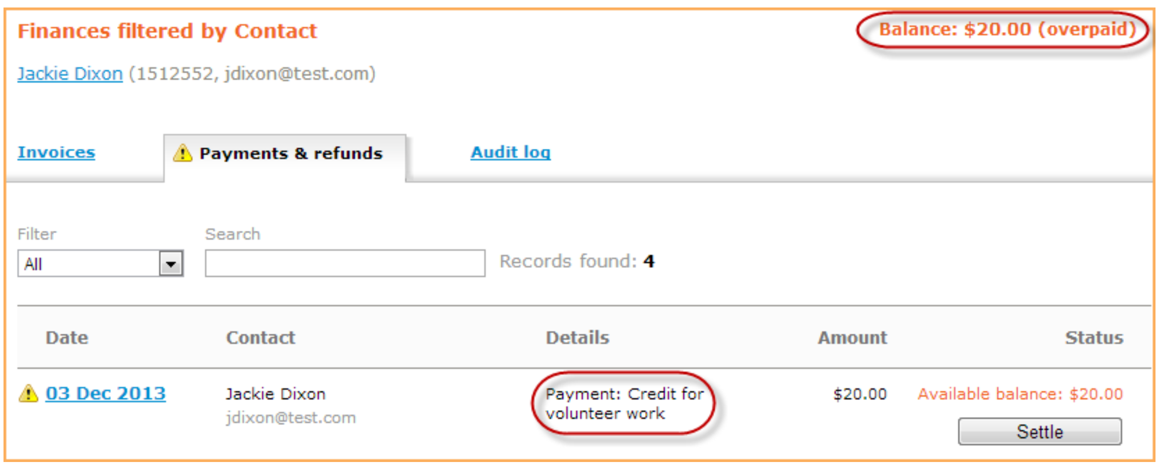


From the **Record payment** screen that appears, select the contact you want to record the payment for, enter the payment amount, select the payment tender, and record any internal notes.



You might want to use custom tenders such as "Credits for volunteer work" so you can track credits and payments on account.

When you are finished entering the payment details, click the **Save** button. The payment amount will be applied to the contact's account, possibly resulting in an overpaid balance (depending on whether the contact has unpaid invoices).

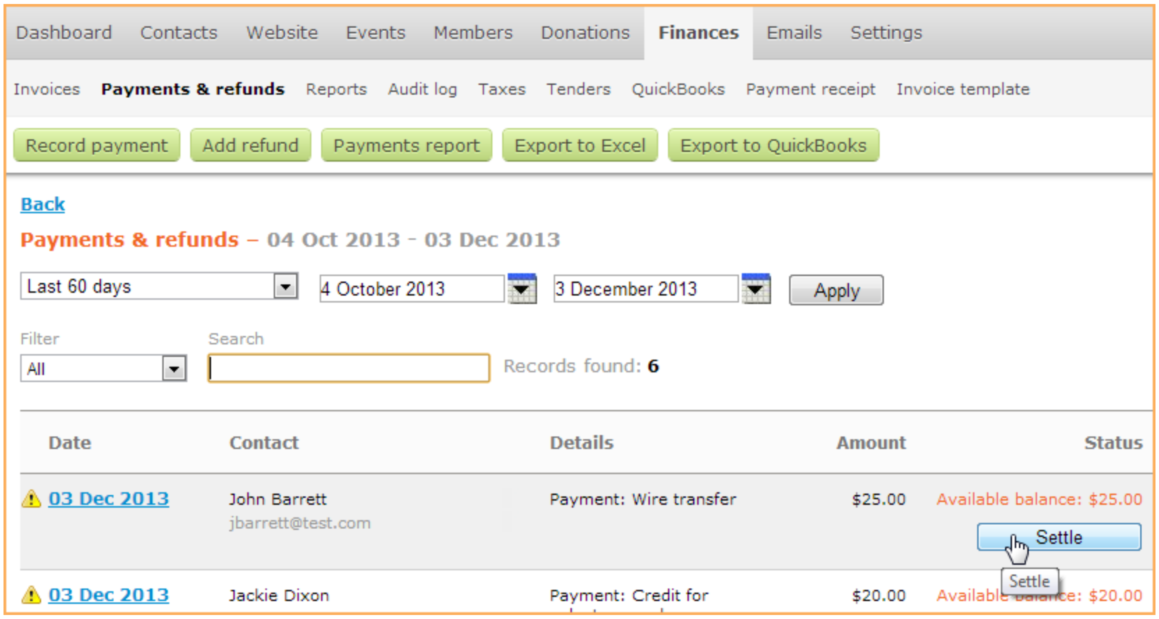


Settling invoices

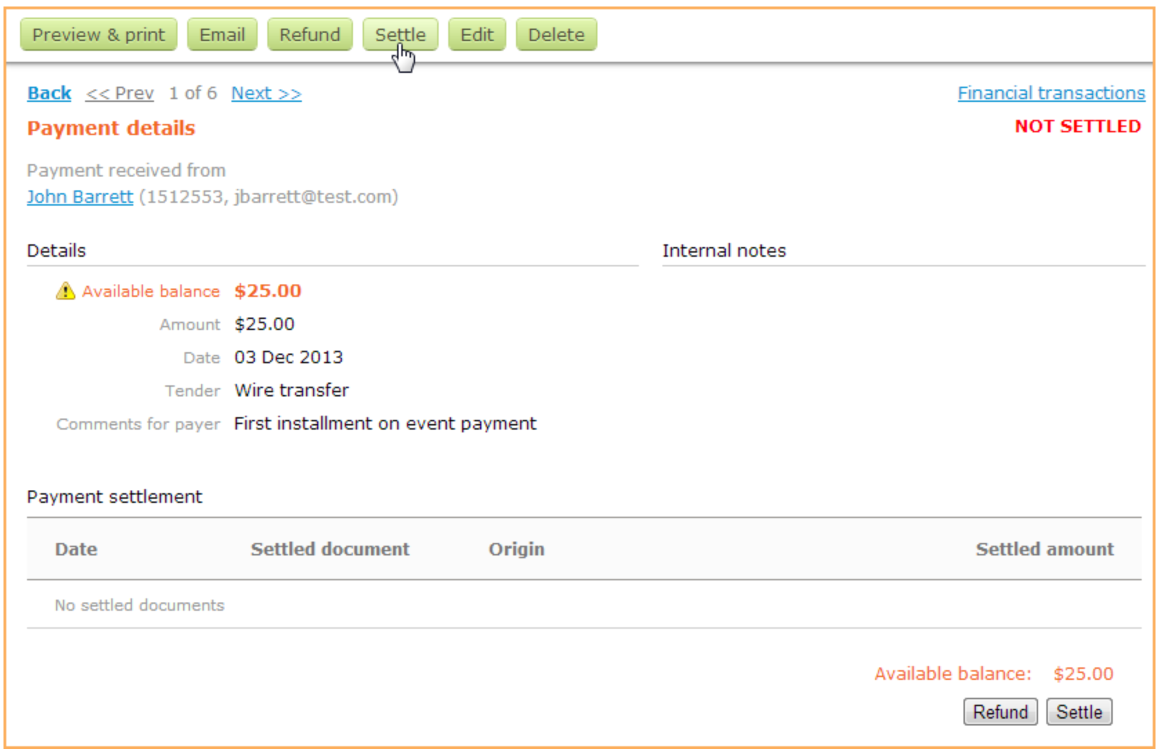
Any payment not already applied to an invoice can be settled to one or more open invoices.

Read more/less

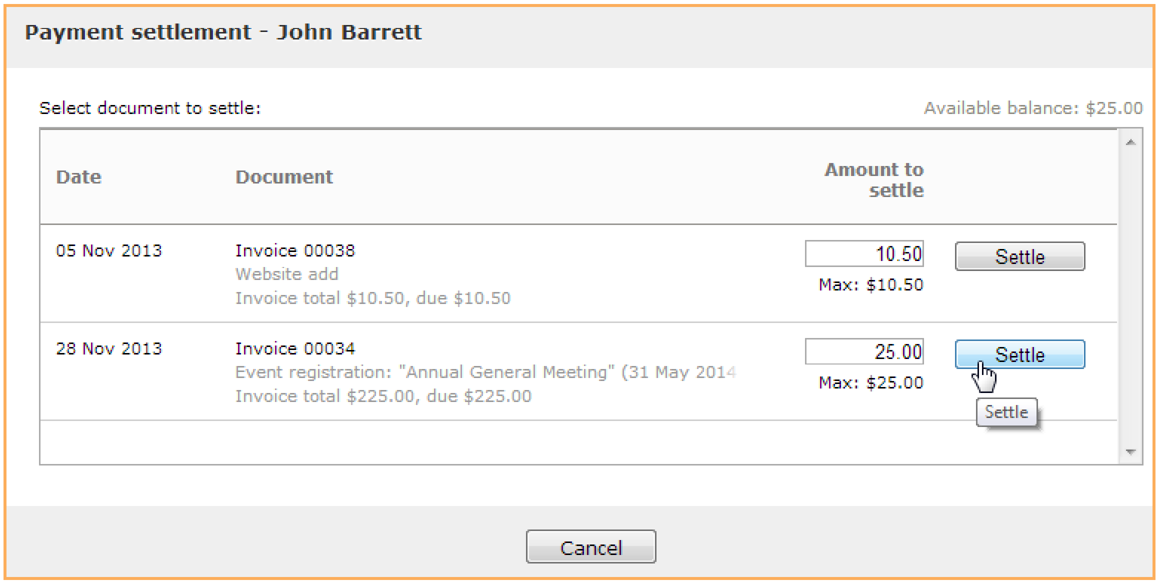
To settle a payment, display the list of payments by hovering over the **Finances** menu and selecting the **Payments & refunds** option. Now, either click the **Settle** button beside the payment in the list...



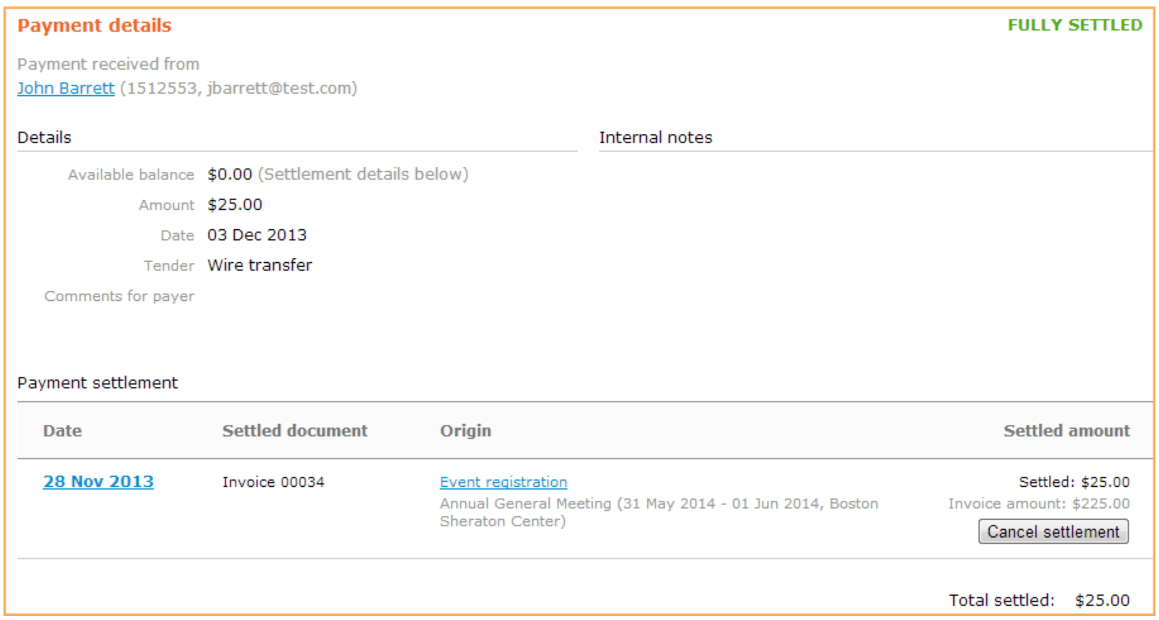
...or click the payment within the list, then click the **Settle** button from the payment details.



From the **Payment settlement** screen, enter the amount to be applied to one or more open invoices then click the **Settle** button beside each invoice.



You do not have to apply the entire amount of the payment. If you apply the full amount of the payment to invoices, then the payment will be marked as fully settled.

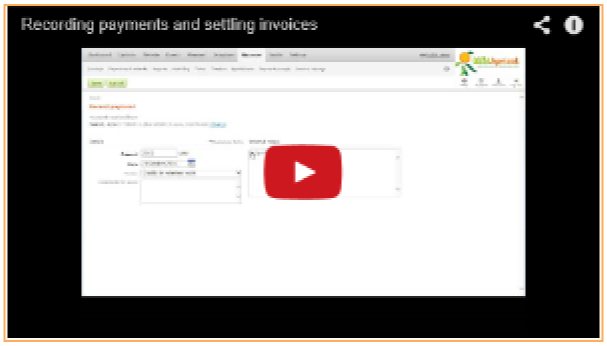


Otherwise, the payment will be marked as partially settled.

Payment receipts

Payment receipts are sent automatically for online payments only. For manually recorded payments, you must manually email the receipt to the contact.

You can customize the payment receipt , used for both online and manual payments, by adding text, graphic, macros, and more.



Recording payments and settling invoices
(5:08)

On this page:

- Recording a payment for a particular invoice
- Recording credits or payments on account
- Settling invoices
- Payment receipts

Expand all sections

See also:

- Invoices
- Payments
- Payment tenders
- Financial management overview
- View account history and pay invoices
- Adjusting or canceling a payment or refund
- Refunds

Payment tenders

Payment tenders

The payment tender is the method by which a payment was received. Cash, check, wire transfer, PayPal, and credit card are all examples of tenders.

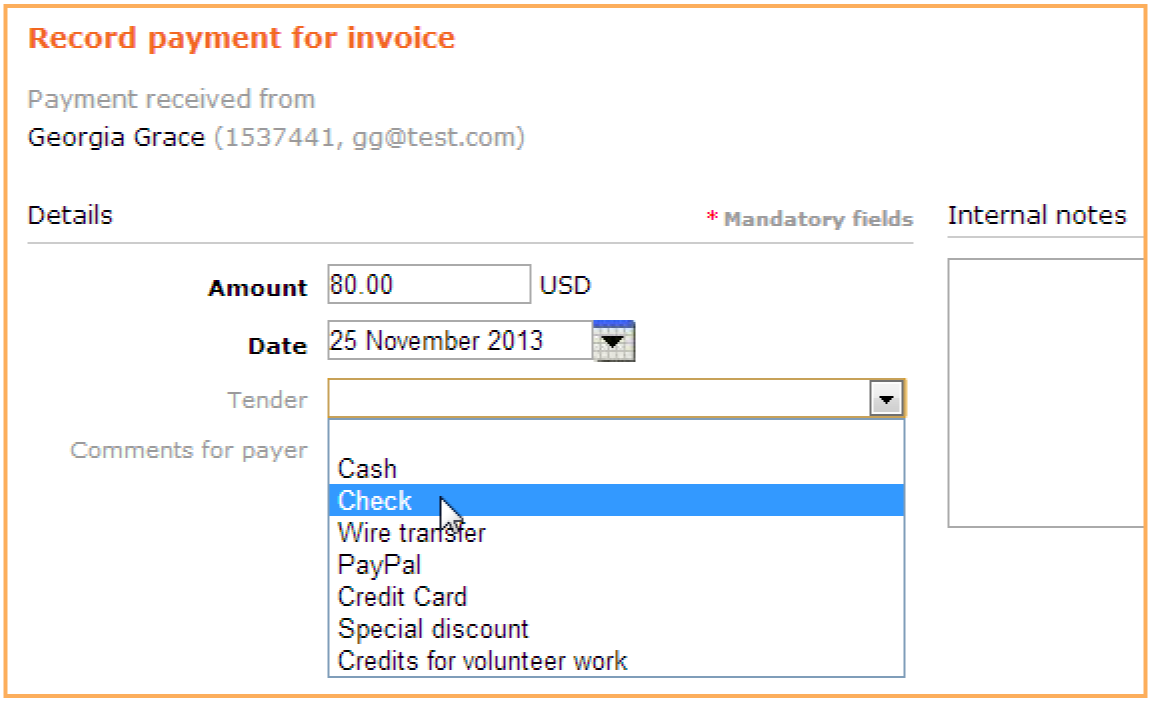
Using payment tenders allows you to classify payments, making reconciliation and reporting easier. The payment report, for example, displays a summary of payments broken down by tender.

For online payments, tender is recorded automatically (for example, *Online - Authorize.Net credit card payment*). For manual payments, you select the tender when you record the payment.

You can customize the list of tenders by adding, removing, and renaming tenders.

Selecting a payment tender

When you record a manual payment, you can select the tender from the list.
Read more/less

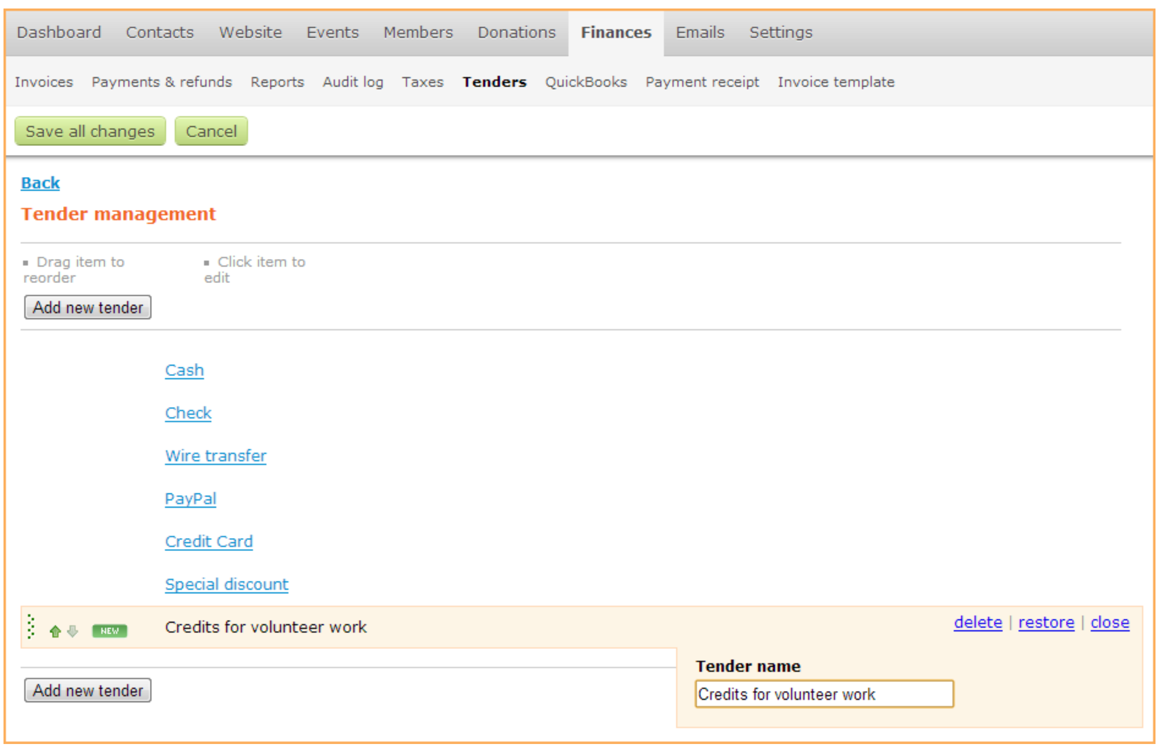


Customizing payment tenders

To customize the list of tenders, hover over the **Finances** menu and select the **Tenders** option.

Read more/less

From the screen that appears, you can add or modify payment tenders.



To add a tender, click the **Add new tender** button. To modify an existing tender, click on it within the list.

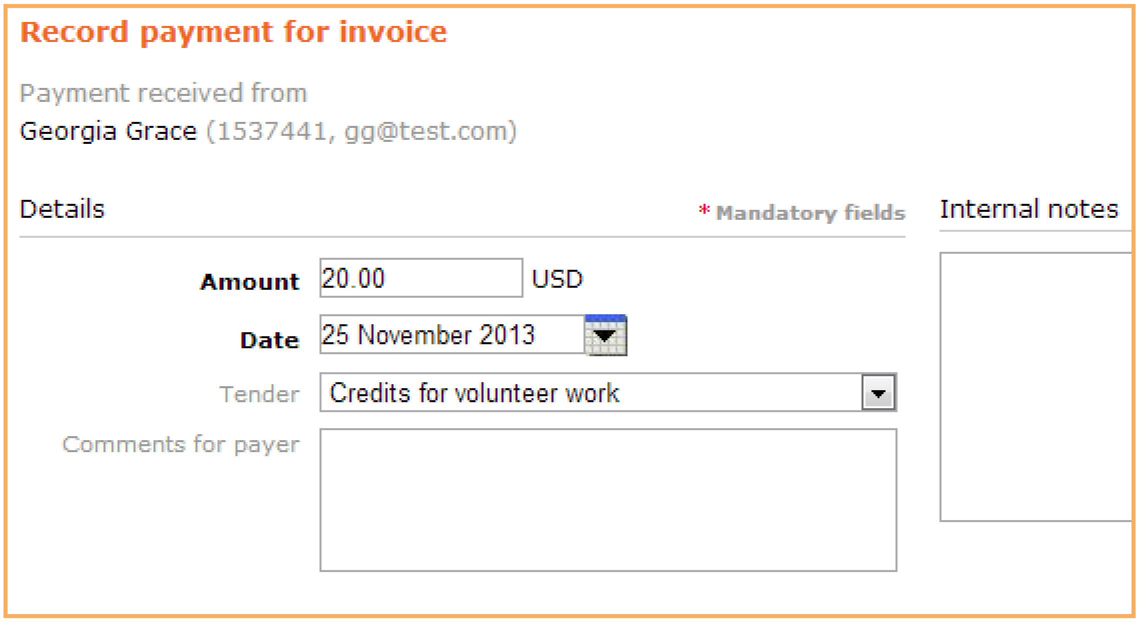
After you are finished modifying your payment tenders, click **Save all changes**.

Using payment tenders for credits or discounts

You can also use tenders to track special cases such as credits or discounts.

Read more/less

If you want to apply a credit to someone’s account so they can use it towards future invoices, you record the credit just like a new payment. Using a custom tender such as “Credits for volunteer work”, you enter the credit amount as the payment amount, resulting in an overpaid balance.



The balance can later be applied to one or more open invoices.

Similarly, you can record a payment to act as a discount towards membership fees or any other charge. In this case, you could use a payment tender such as "Discount coupon". The discount payment can be settled to the invoice for the membership fees, resulting in a lower outstanding balance.

You can also provide a discount towards membership fees using discount coupons. Discount coupons are used to reduce the invoice balance rather than apply a partial payment against the full invoice.

Payments report broken down by tender

The payments report displays a summary of payments, donations, and refunds broken down by payment tender.

Read more/less

Summary	Total	Nov - 2012	Dec - 2012	Jan - 2013
Authorize.NET Credit Card	26.25	0.00	0.00	0.00
Check	210.00	150.00	0.00	0.00
Credit Card	341.50	0.00	100.00	15.75
Credits for volunteer work	20.00	0.00	0.00	0.00
No tender	388.50	0.00	0.00	52.50
PayPal	884.00	300.00	50.00	162.75
Wire transfer	25.00	0.00	0.00	0.00
Grand Total	1,895.25	450.00	150.00	231.00

The report is further broken down by invoiced payments, donations, and refunds.

To generate a payments report, follow these steps:

1. Hover over the **Finances** menu and select the **Reports** option.
2. Click the **Payments** link.
3. Select a date range – when the income was recorded or received.
4. Select the invoice/payment type(s) you are interested in. You can filter the report by invoice origin – events, payments, donations, or manually created invoices – or by payment status – fully paid, partially paid or unpaid.

5. Click **Generate report**.

On this page:

Expand all sections

See also:

- Recording payments and credits, and settling invoices
- Adjusting or canceling a payment or refund
- Online payment

Adjusting or canceling a payment or refund

Adjusting or canceling a payment or refund

There are various situations when you might need to adjust or cancel a payment or refund:

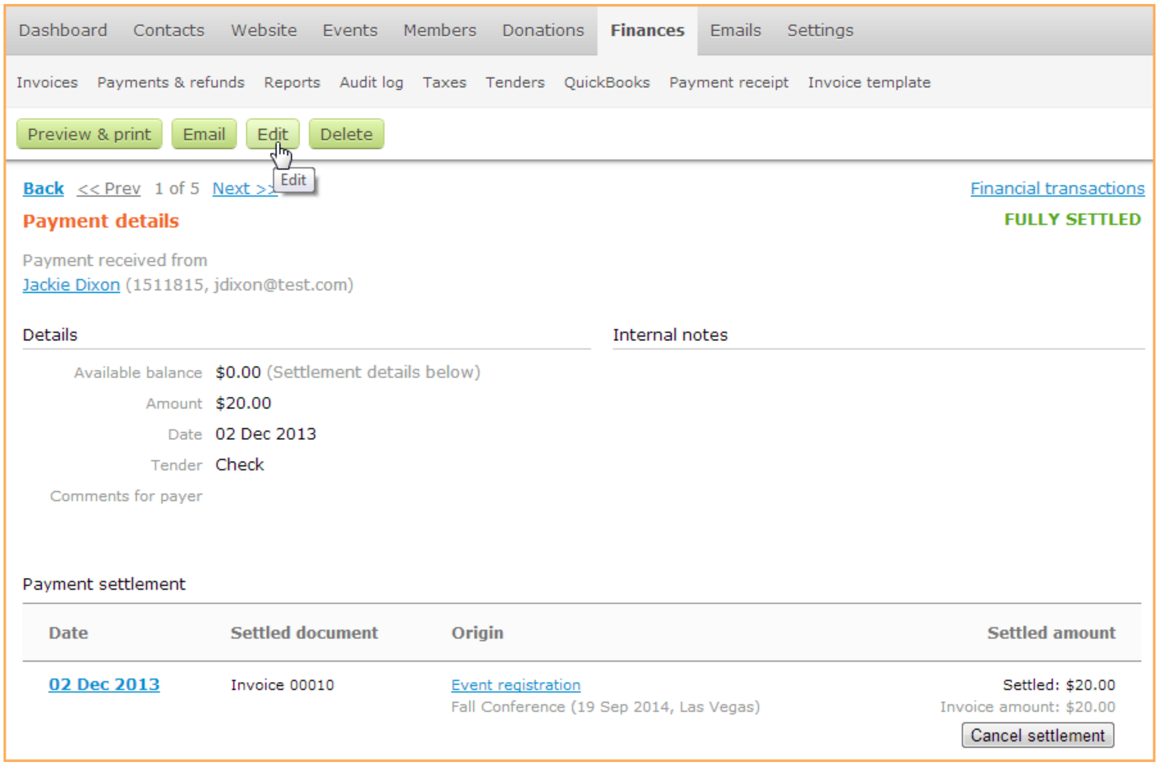
- It was entered with incorrect details, such as contact name, date, amount, or tender.
- You might want to add some internal notes (e.g. record check number) or apply tax.
- The check has bounced and you want to cancel the payment.

Adjusting payments

To adjust a recorded payment – whether settled or unsettled – follow these steps:

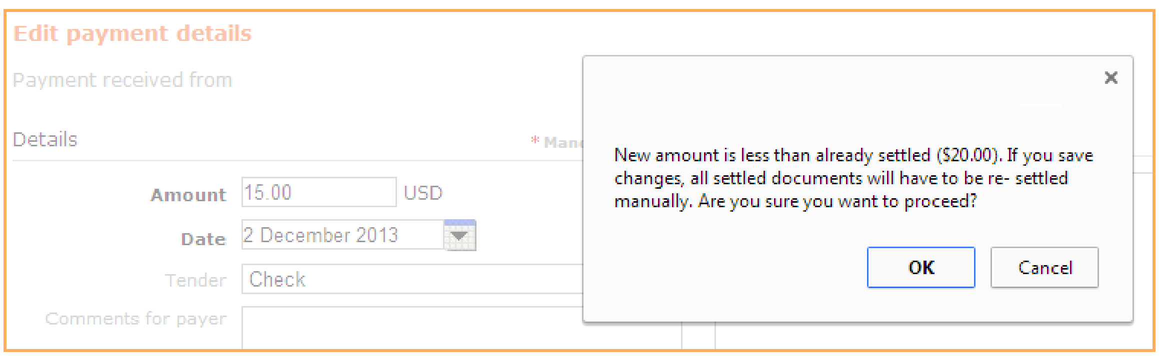
Read more/less

1. Hover over the **Finances** menu and select the **Payments & refunds** option.
2. Find the payment within the list and click on it.
3. From the payment details, click the **Edit** button.



4. Adjust the payment details as required.
5. Click the **Save** button. Payment details and contact records, including balance, are automatically updated.

When you attempt to adjust the amount of a partially or fully settled payment to less than the settled amount, you will be warned that saving your change will result in the settlement being automatically canceled.



If you proceed with the change, you'll need to manually settle the payment.

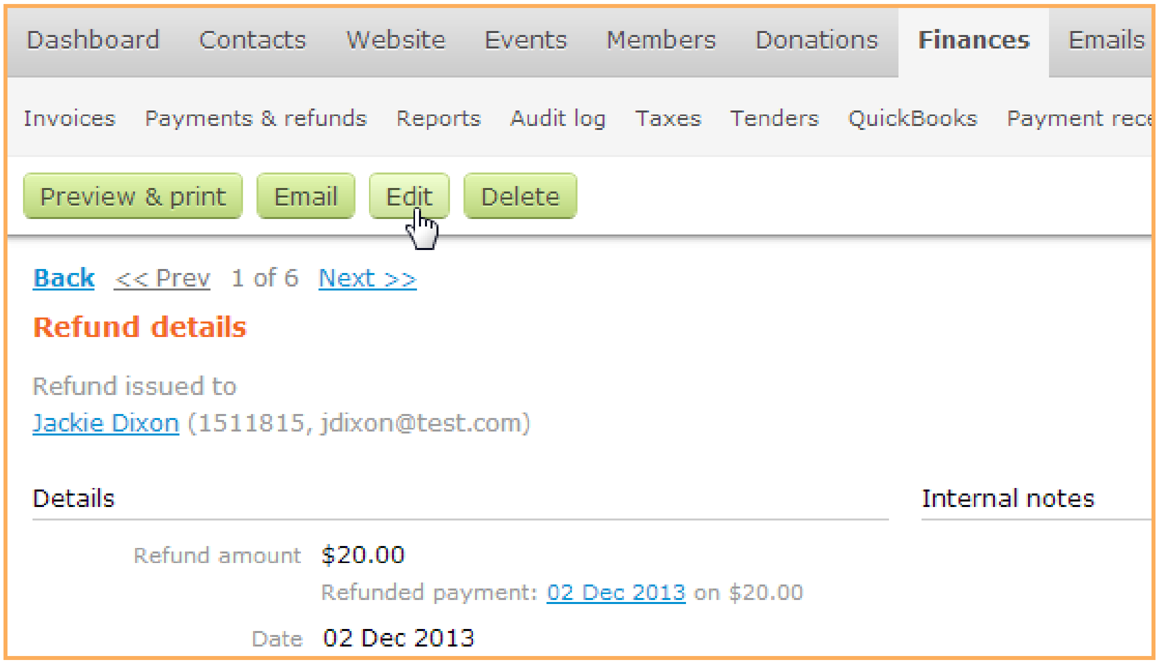
Adjusting refunds

You can adjust a refund as you would any payment. For settled refunds, you cannot modify the refund amount.

Read more/less

To adjust a refund, follow these steps:

1. Hover over the **Finances** menu and select the **Payments & refunds** option.
2. Find the refund within the list and click on it.
3. From the refund details, click the **Edit** button.



4. Adjust the refund details as required. For settled refunds, you cannot modify the refund amount.
5. Click the **Save** button.

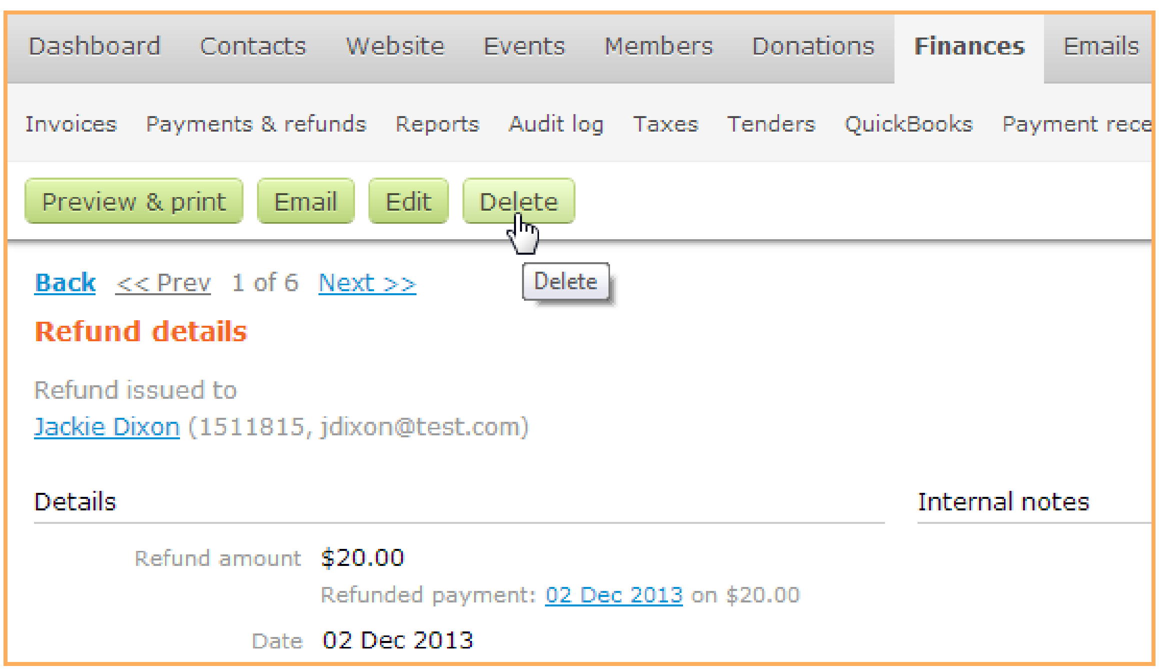
Canceling payments and refunds

You can cancel a payment or refund by deleting it. Any settlements associated with the payment or refund will be automatically canceled.

Read more/less

To cancel a payment or refund, follow these steps:

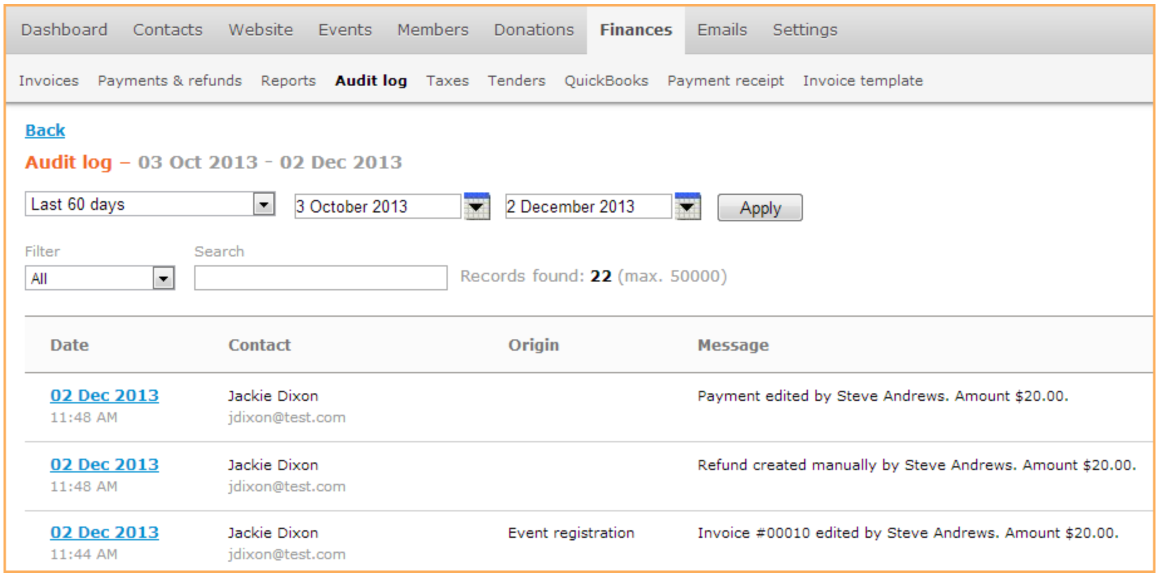
1. Hover over the **Finances** menu and select the **Payments & refunds** option.
2. Find the payment or refund within the list and click on it.
3. From the payment or refund details, click the **Delete** button.



4. You will be prompted to confirm the deletion. Click **Yes** to proceed with the deletion.

Tracking changes

The audit log records all important financial activities on your account, including the modification or deletion of payments and refunds.
Read more



To view the audit log, hover over the **Finances** menu and select the **Audit log** option.

On this page:

- Adjusting payments
- Adjusting refunds
- Canceling payments and refunds
- Tracking changes

Expand all sections

See also:

- Payments Overview
- Recording payments and credits, and settling invoices

Refunds

Refunds

In Wild Apricot, you can process and track refunds for payments you have already received.

There are two types of refunds:

- automatic – for online payments to payment systems that support automatic refunds.
- manual – for manual payments and other offline payments.

All refunds are related to payment records in your Wild Apricot account, and can be automatically or manually settled to a particular payment.

A refund can be full, when a complete payment amount is returned, or partial, when only a partial amount is returned. Therefore, a payment record can be refunded and settled with one or more partial refunds.

For information on applying a credit to an account, see Recording payments and credits, and settling invoices.

Automatic refunds

Automatic refunds are online refunds that are issued outside of Wild Apricot but are automatically recorded and settled within your Wild Apricot account.
Read more/less

Automatic refunds are supported by the following payment systems:

- PayPal Standard

- PayPal Payments Pro
- PayPal Express Checkout

To issue a refund for payments using one of the supported payment systems, a Wild Apricot administrator follows these steps:

1. Log into your PayPal account.
2. Find the payment transaction you want to refund.
3. Within the payment details, click the **Issue Refund** or similarly named button or option.
4. Indicate the amount of the refund.
5. Save or otherwise complete the refund.

A refund notice will be created and automatically sent to Wild Apricot after the administrator confirms the refund. After receiving a refund notice, Wild Apricot will perform the following actions:

- Record a confirmation that the refund notice was received.
- Create a new refund record.
- Find the corresponding payment and automatically settle the refund with the payment. If the corresponding payment is not found or if the refund notice is not received by Wild Apricot (e.g. due to some technical malfunction) then the refund has to be processed manually.

If you issue an automatic refund for a settled payment, the refund will be applied to the payment and the corresponding invoice will become unpaid.

Manual refunds

You can issue a manual refund for any payment recorded in Wild Apricot. Manual refunds are typically used in the following cases:

- Refund is for a manual payment
- Refund was issued manually outside of Wild Apricot (e.g. by check or cash) for an online payment
- Refund was issued by an online payment system that does not support automatic refunds
- Refund was issued by an online payment system that does support automatic refunds but Wild Apricot did not receive the refund notification

> Wild Apricot does not process any transactions, so recording manual refunds in Wild Apricot will not result in the transfer of any funds. The transferring of funds associated with a manual refund must be initiated by you from within your payment processor.

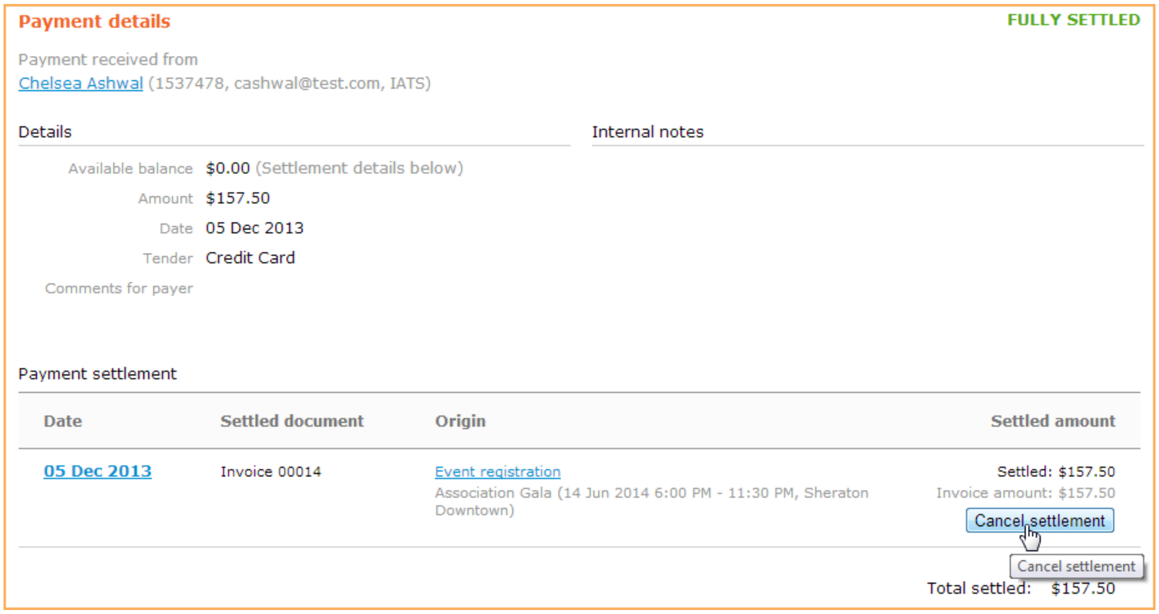
Issuing a refund against a payment

Usually, a refund is recorded for a corresponding payment. You can only refund payments that have open balance (not fully settled to one or more invoices).

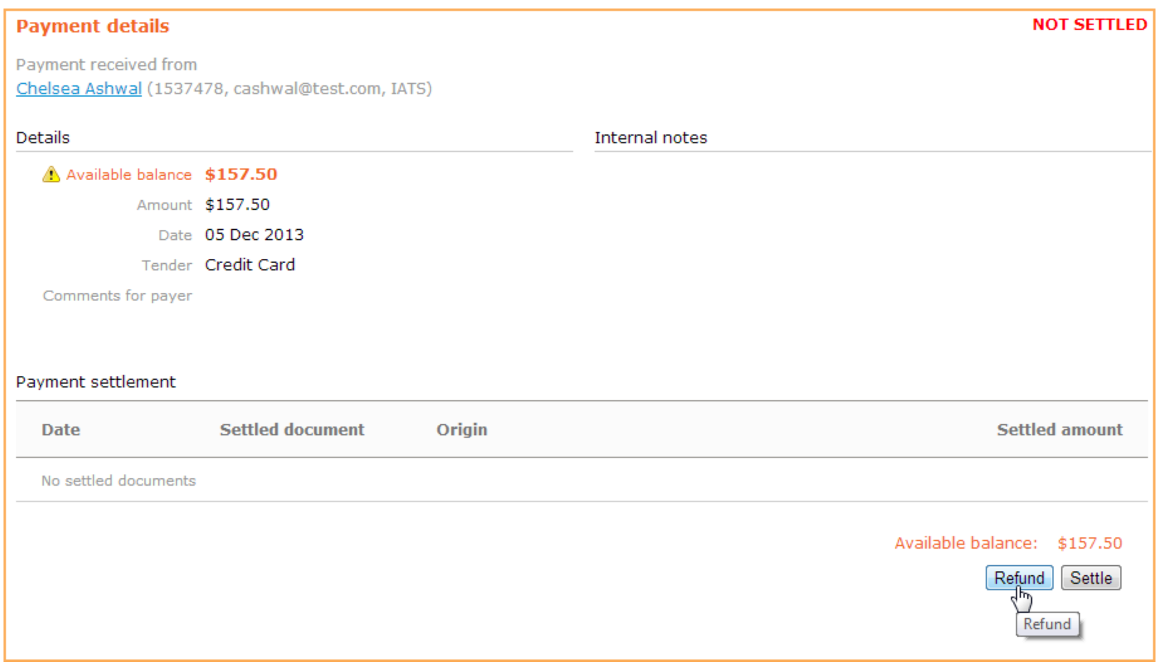
Read more/less

To issue a refund against a particular payment, follow these steps:

1. Find the payment in question, either from a contact's financial transactions list or from the Payments & refunds screen within the **Finances** module.
2. If the payment is already settled, click the **Cancel settlement** button.



3. Now that your payment record has available balance, you can proceed with the refund by clicking the **Refund** button.
4. On the next screen, you can adjust the details of the refund, and record a custom payment tender – the method by which the refund was issued.
5. When you are finished entering the refund details, click the **Refund** button.



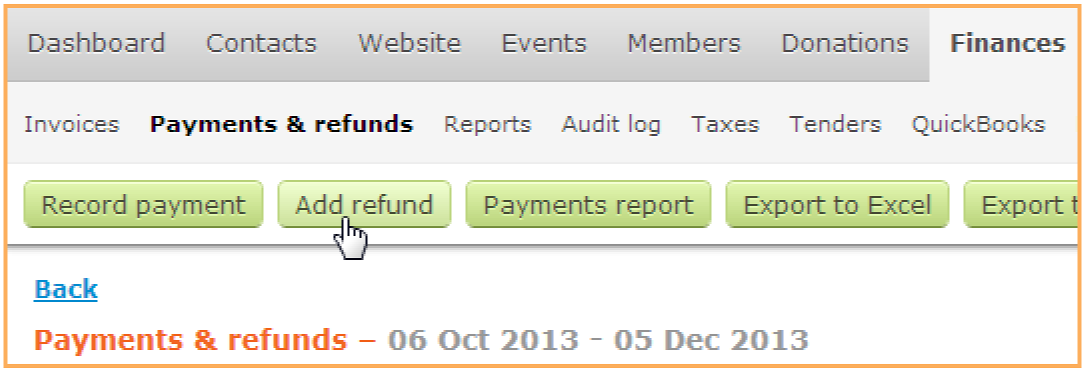
Issuing refunds to an account

Instead of issuing a refund for a particular payment, you can issue a refund directly to a contact's account without settling the refund to any particular payment. You can, at any time in the future, settle the refund to a payment.

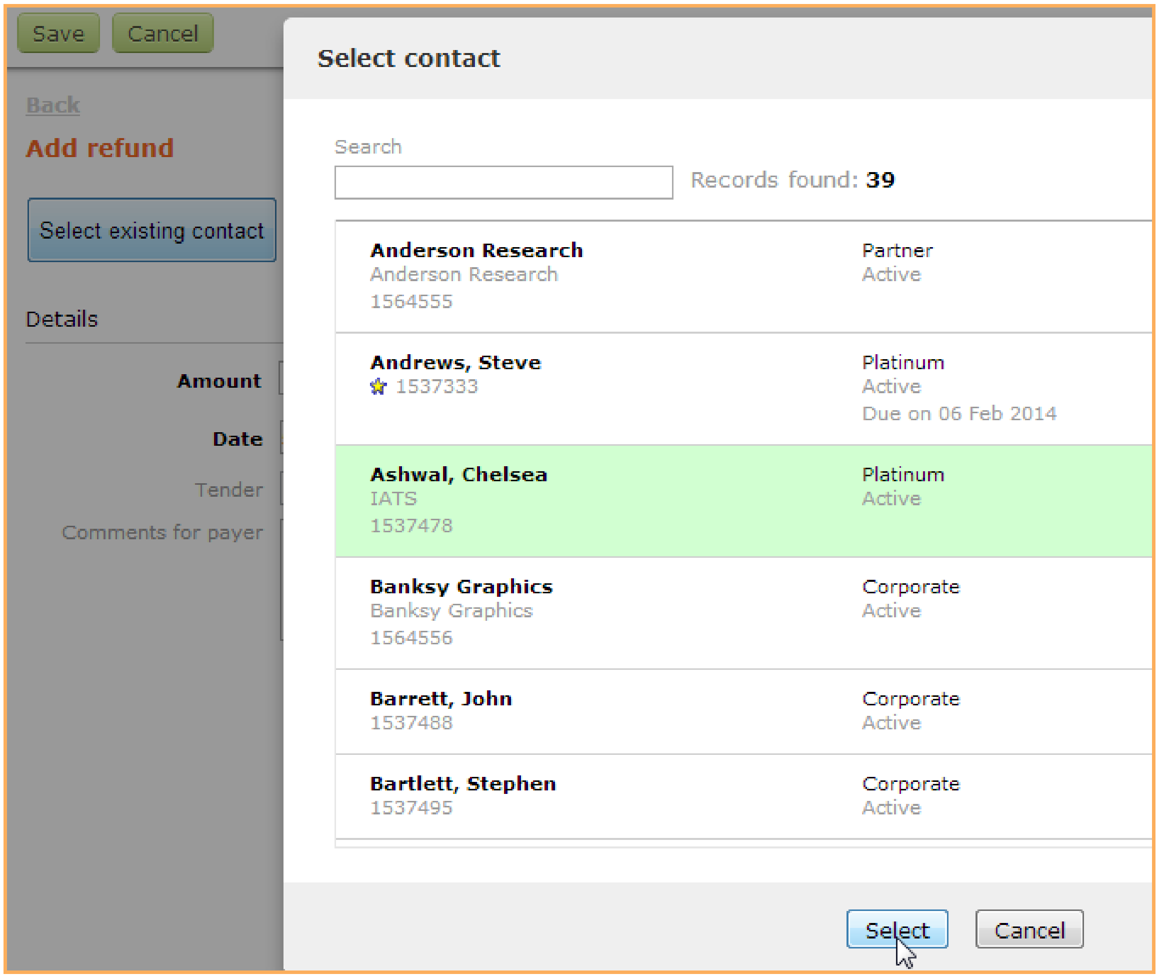
Read more/less

To issue a refund to an account, follow these steps:

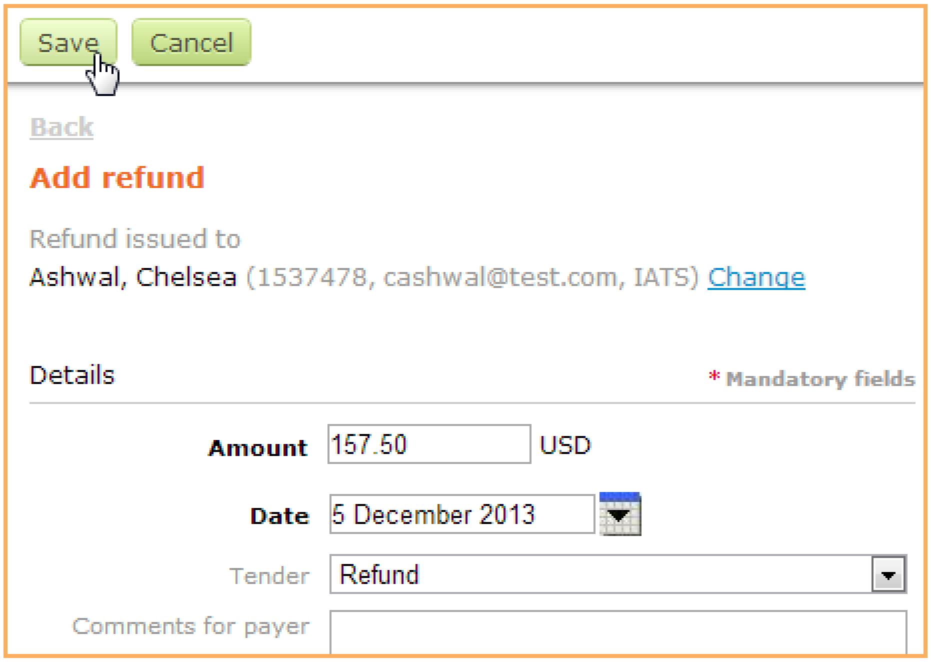
1. Hover over the **Finances** menu and select the **Payment & refunds** option.
2. From the **Payments & refunds** screen, click the **Add refund** button.



3. On the **Add refund** screen, click **Select existing contact** and then select the contact from the list.



4. After you select the contact, fill out the refund details and click the **Save** button.



The refund will reduce the available balance for the contact. The refund will be marked as not settled. To settle the refund, you need to find an unsettled payment for the contact and settle it with the refund.

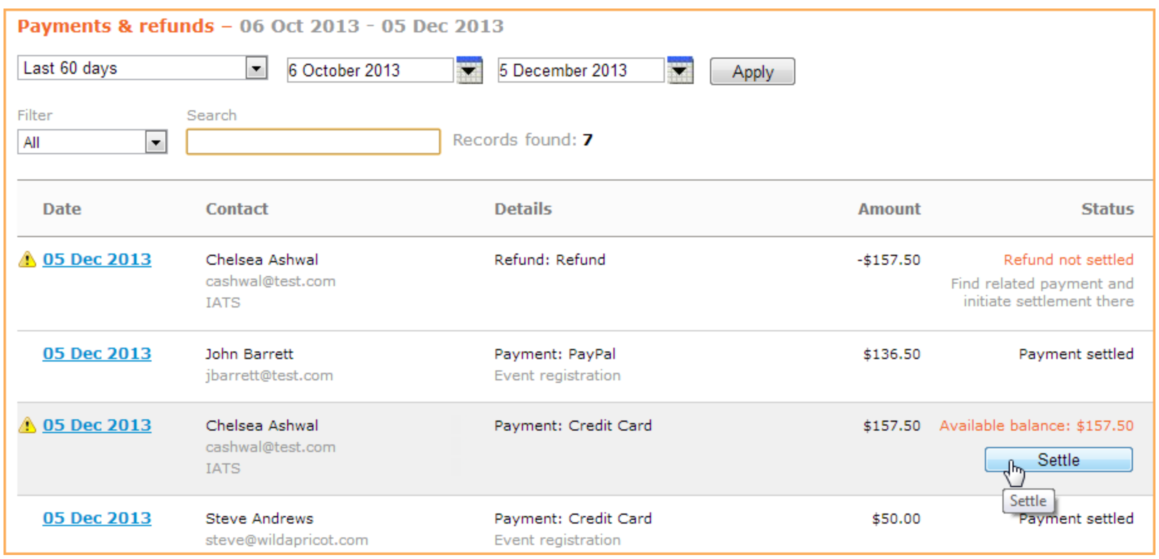
Manually settling refunds

Refunds initiated from PayPal are automatically settled with the corresponding payment. Refunds issued against a recorded payment are settled with that payment. However, if you record a refund to a contact's account, you can settle the refund manually.

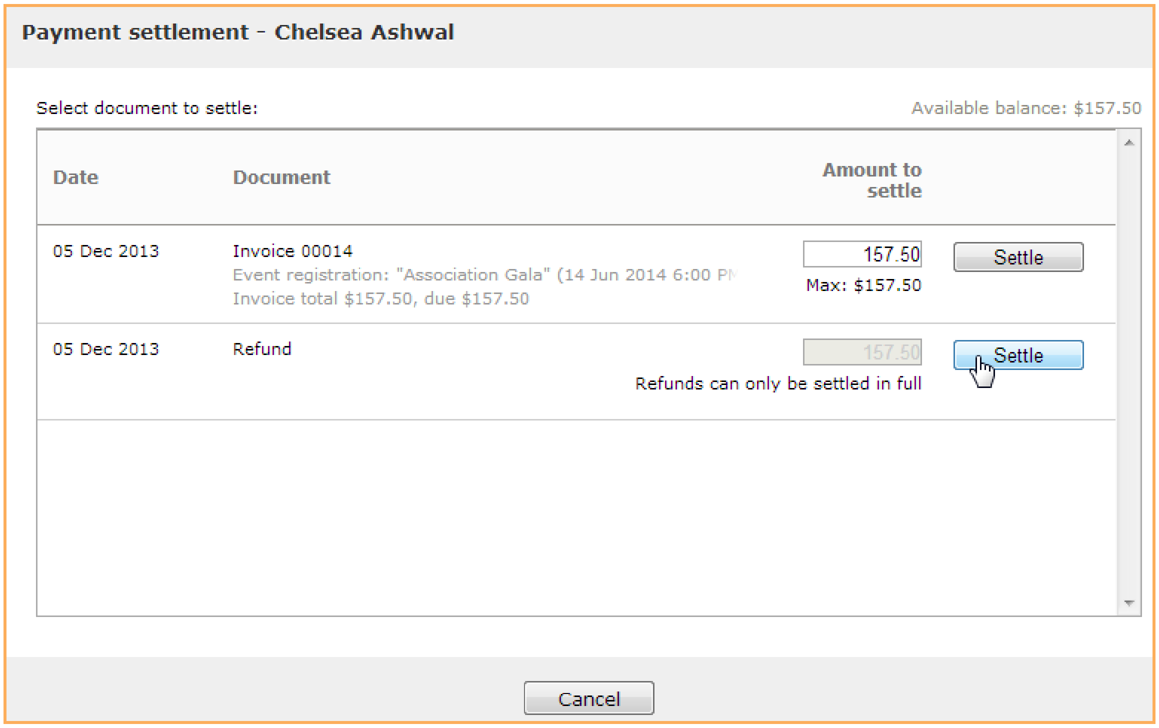
Read more/less

To manually settle a refund, follow these steps:

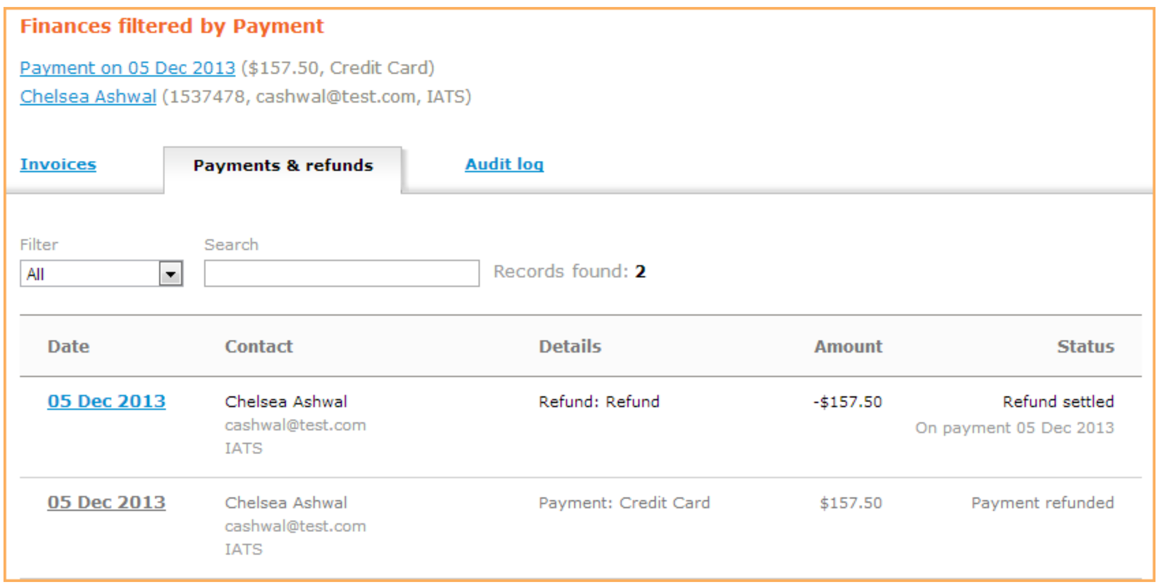
1. Find the payment to which you want to settle the refund.
2. Click the **Settle** button for that payment.



3. In the window that appear, click the **Settle** button beside the refund.



Now, the payment and refund are both marked as settled.



Video: Refunds (3:53)

On this page:

Expand all sections

Discounts and complimentary transactions

Discounts and complimentary transactions

You may wish to offer selected members discounts towards event registration, membership fees, or other charges. Discounts can be partial or total, resulting in a complimentary – i.e. free – transaction.

A discount – which reduces or eliminates the invoice balance – is distinct from a credit which is added to a contact's account balance then later applied towards the invoice.

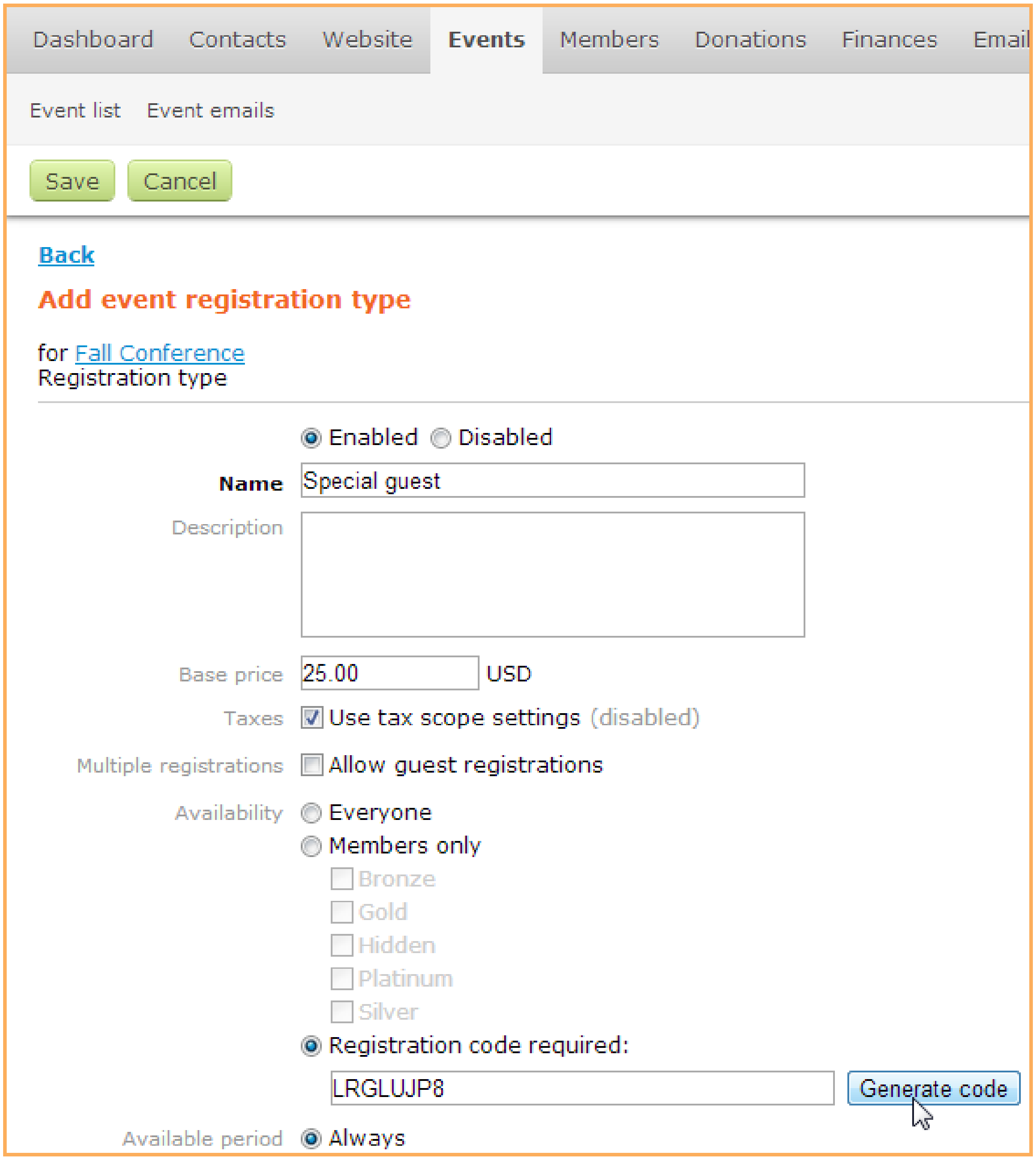
The options for providing discounts differs depending on whether the discount is towards event registration, membership fees, or other charges.

Event registration discounts

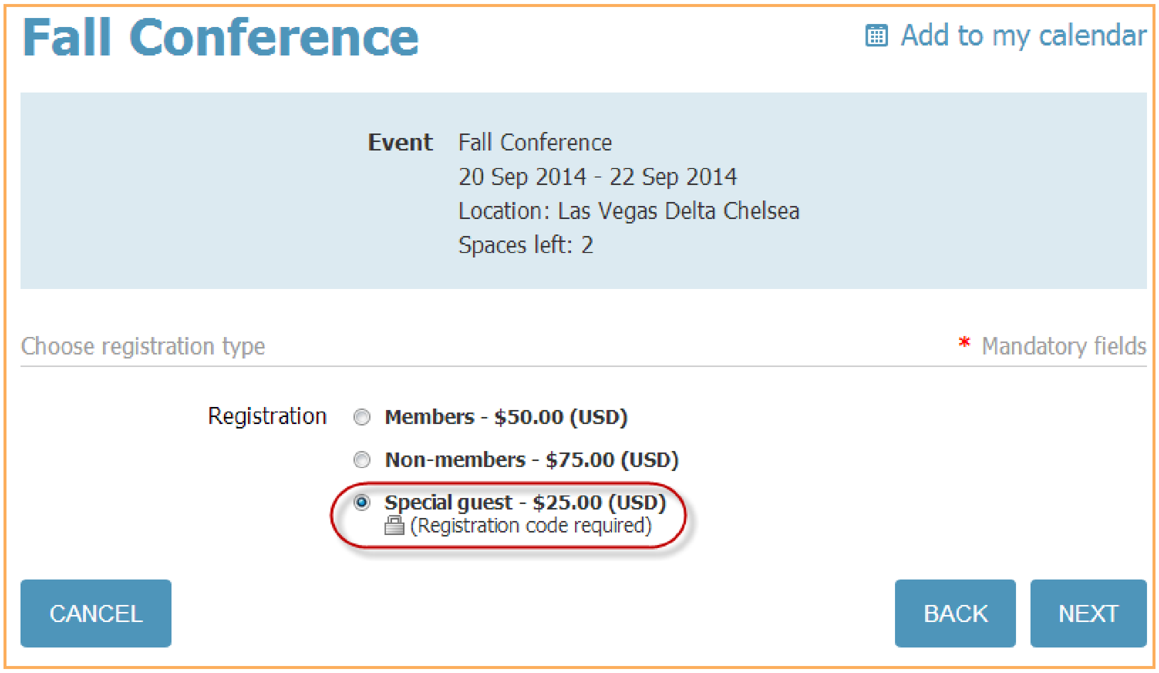
Discounts for event registration can be provided using event coupon codes.

Read more/less

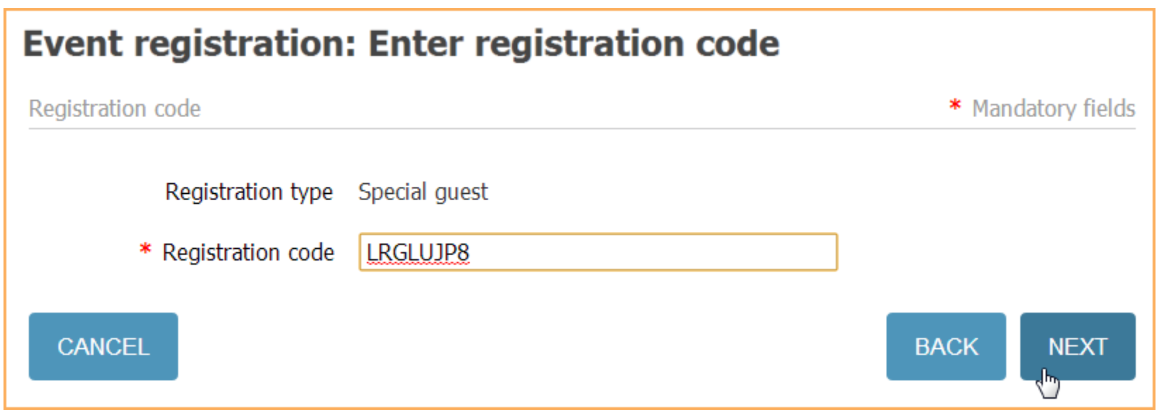
To create an event coupon code, you create a special event registration type with a reduced base price, and click the **Registration code required** option under **Availability** . You can then enter the coupon code yourself or click the **Generate code** button to create a randomly generated code.



The discount code can be provided to members and other supporters by email or any other method. On the event registration form, they select the special registration type...



...and enter the coupon code.



Membership discounts

Membership discounts can be provided using membership discount coupons. You can use discount coupons to offer free trials, early renewal incentives, or reduced first-year memberships. You can control whether each discount coupon applies to new memberships, membership renewals, and member level changes.

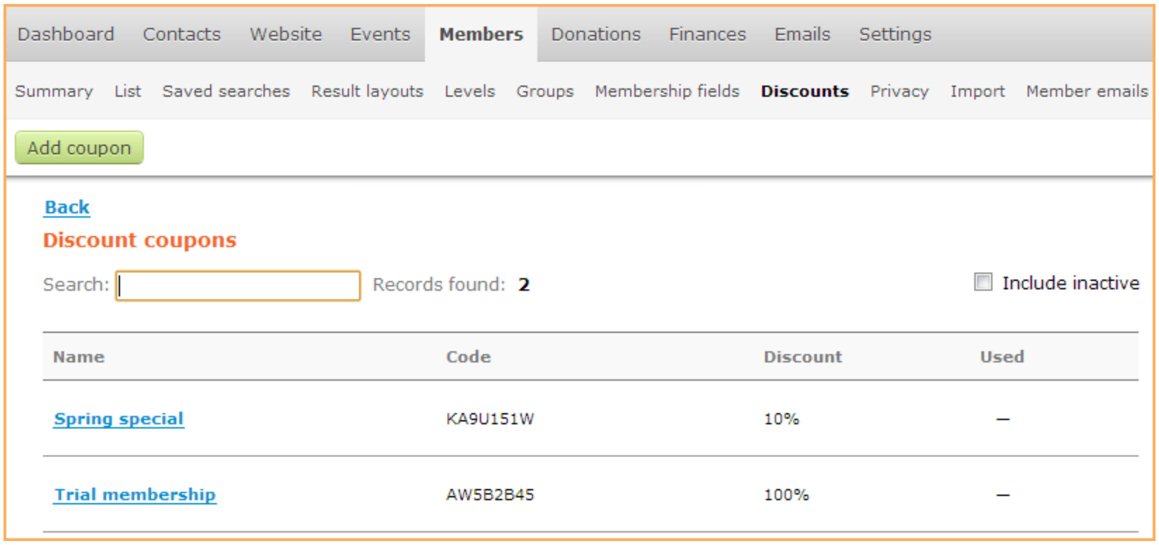
> You cannot use membership discount coupons for free membership levels, or for levels that use automatic recurring payments. Also, you cannot use discounts for a renewal if the **Generate and email invoice** option is enabled for that membership level.

Creating membership discounts

Read more/less

To create a membership discount, follow these steps:

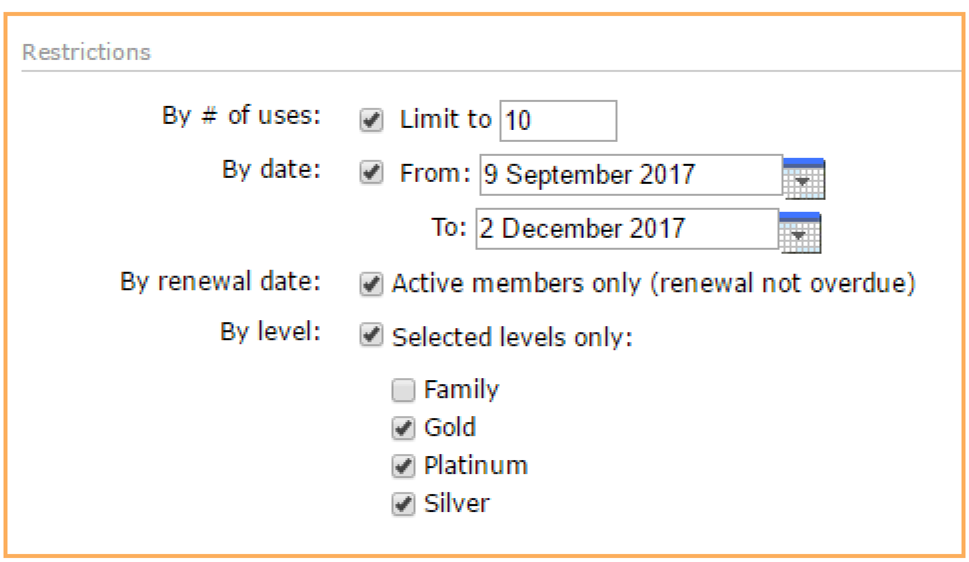
1. Hover over the **Members** menu and select the **Discounts** option. The **Discount coupons** screen appears.



2. Click the **Add coupon** button.
3. Specify the following general information:

Option	Description
Active	Controls whether the coupon is active. Unchecking this option allows you to disable the coupon without deleting it.
Name	The name used to identify the coupon.
Code	The discount coupon code. You can enter the coupon code yourself or click the **Generate code** button to create a randomly generated code. The code must be unique among the membership discount coupons, and is not case sensitive.
Reduce cost by	The amount of the discount as a percentage or a dollar amount. You cannot enter a negative amount or a percentage in excess of 100.

4. Indicate whether you want the discount to be available for new membership, membership renewals, and member level changes.
5. If you want, you can restrict the coupon to a certain number of uses, to a certain time period, to active members only (excluding those whose renewal is overdue), or to selected membership level(s).



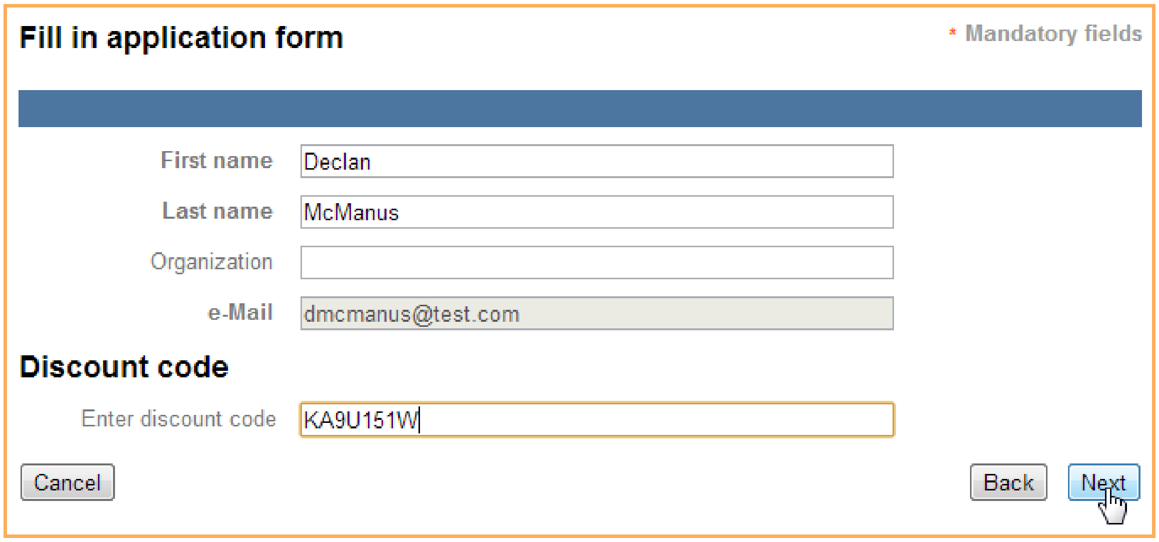
> ⚠ You cannot restrict the number of uses if you set the discount to 100% because invoices are not generated – and the number of uses are not counted – when the fee is reduced to zero.

6. Once you are finishing setting up the coupon, click the **Save** button.

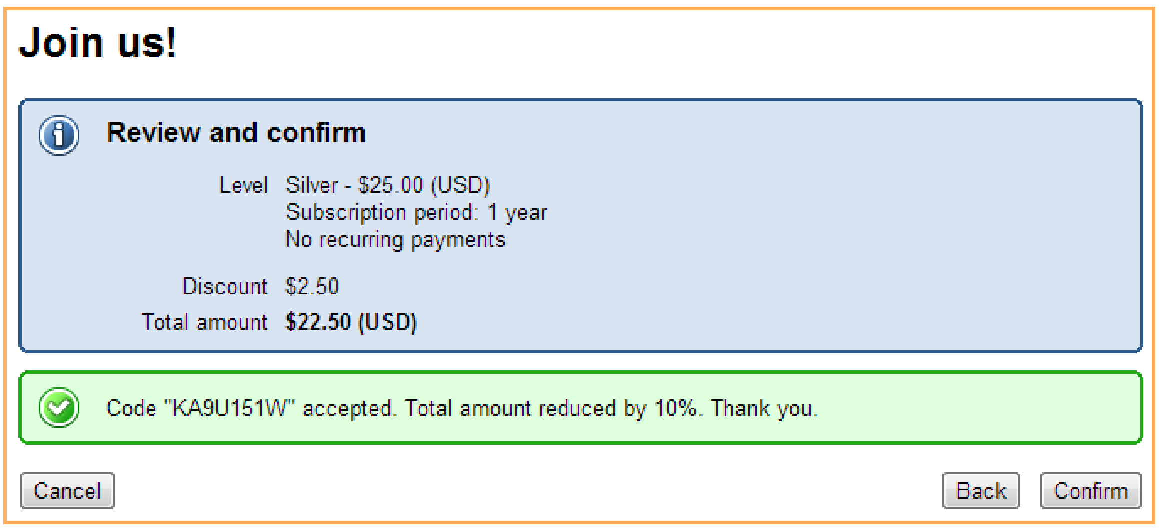
Using membership discounts

Read more/less

Depending on how you set up the discount, a **Discount code** field will appear on the detailed application form when a visitor applies for membership, renews their membership, or request a level change.



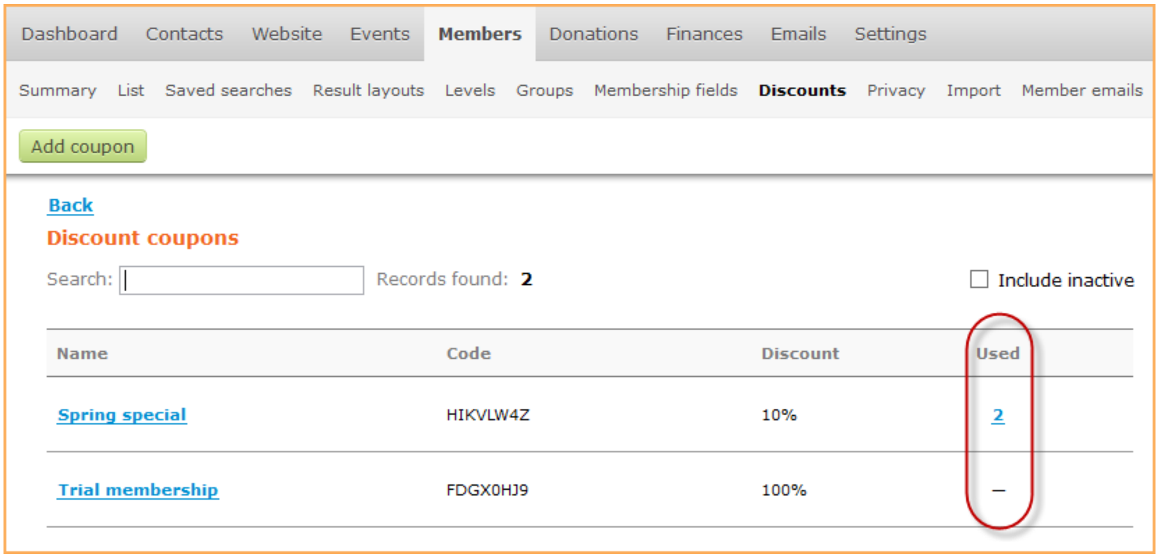
After the discount code is entered into the field, the discount will be applied to the membership fee, and a confirmation message will appear.



Tracking membership discount use

Read more/less

On the **Discount coupons** screen, the **Used** column indicates how many times each discount coupon was used.



Coupons with a 100% discount are not tracked because invoices are not generated when the fee is reduced to zero.

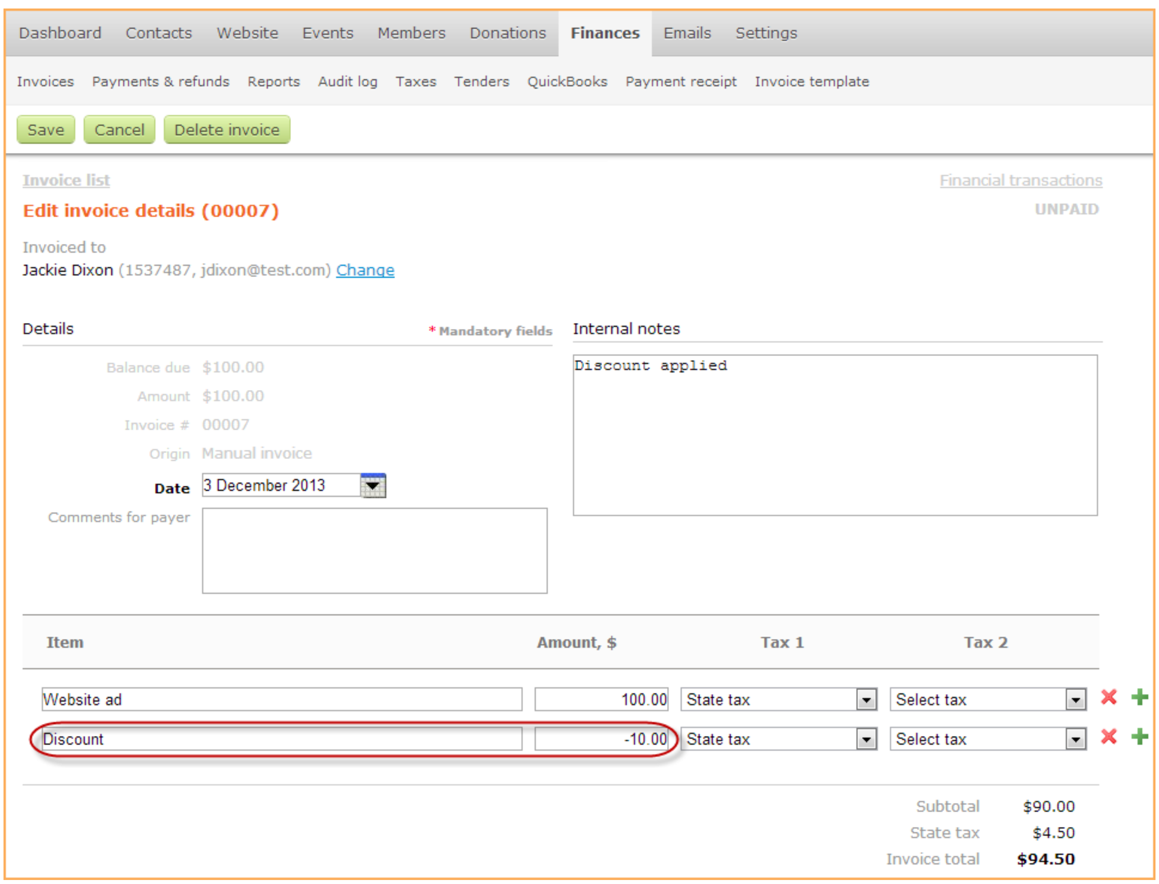
Discount coupons vs. pro-rating

You can use discount coupons instead of pro-rating new membership fees if you want to reduce a specific amount each month. For example, if someone joins in June, they get $10 off, $20 off in July, $30 off in August, etc., you can create separate discount coupons only active for that specific month. Pro-rating would not work in this case since it is automatically calculated.

Entering discounts manually

To provide a discount for other charges, or to enter a discount for event registration and membership fees manually, you can edit the invoice and add an item for the discount with a negative amount.

Read more/less



This will update the invoice and contact balances. However, the original transaction will not be changed. and there will be a discrepancy between the transaction amount and invoice amount.

For complimentary transactions – those with no cost at all – you can delete the invoice altogether. However, this will result in a transaction without a corresponding invoice. Transactions without invoices will not be included into your income reports.

Instead of providing a discount, you can provide a credit towards the full cost of the invoice.

On this page:

Expand all sections

See also:

- Issuing manual invoices
- Recording payments and credits, and settling invoices
- Prorating membership dues for new applications

Managing donations

Managing donations

You can set up your Wild Apricot site to accept donations, so visitors to your site can provide financial support to your organization. Donations can be made through a donation form on your site or recorded manually by administrators.

Donations do not generate invoices in Wild Apricot. Instead, donations are only recorded when the payment is received. For this reason, donations do not affect contact balance and are not settled.

Once a donation is processed, it can be modified, deleted, or refunded. You can view a list of donations by date or by donor, and export the donations records to a spreadsheet.

> You cannot import donation records from another source into Wild Apricot.

Adding an online donation form

Donation forms – like other site content – are inserted as gadgets , in this case, a donation form gadget .

Read more/less

You can choose the donation fields you want displayed on the donation form as part of the settings for the donation form gadget. One of your donation fields is the **Amount** field, a system field that cannot be renamed, deleted, or excluded from the donation form.

If the visitor viewing the donation form is not logged in, common fields will appear on the form as well. You can choose the common fields you want to appear on the form as part of the donation form gadget settings, but you cannot exclude the **Email** field.

Common fields that are set to administrator-only access will not appear.

You can create custom donation fields to allocate a donation to a specific fund or fundraising campaign, or collect information on your donors. Also, you can set the **Amount** field to accept any amount and/or predefined amounts. For more information on setting up and using donation forms, see Donation forms.

To enable online donations, you need to set up online payments.

To track the success of your fundraising efforts, you can add a donation goal gadget to a page on your site. The donation goal gadget displays a progress bar that measures progress towards your financial goal. Within the donation goal gadget's settings, you set the goal.

You can embed a Wild Apricot donation form into another website using widgets.

Manually recording a donation

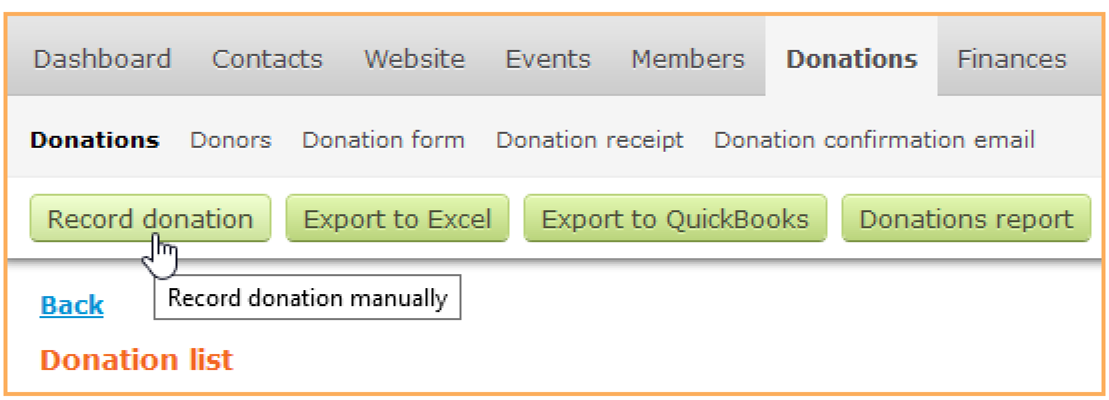
Administrators can manually record a donation received from a contact, whether the payment was made by cash, cheque, credit card, PayPal, or any other tender method.

Read more/less

For instructions on setting up a donation page so visitors to your site can make a donation online, see Donation forms.

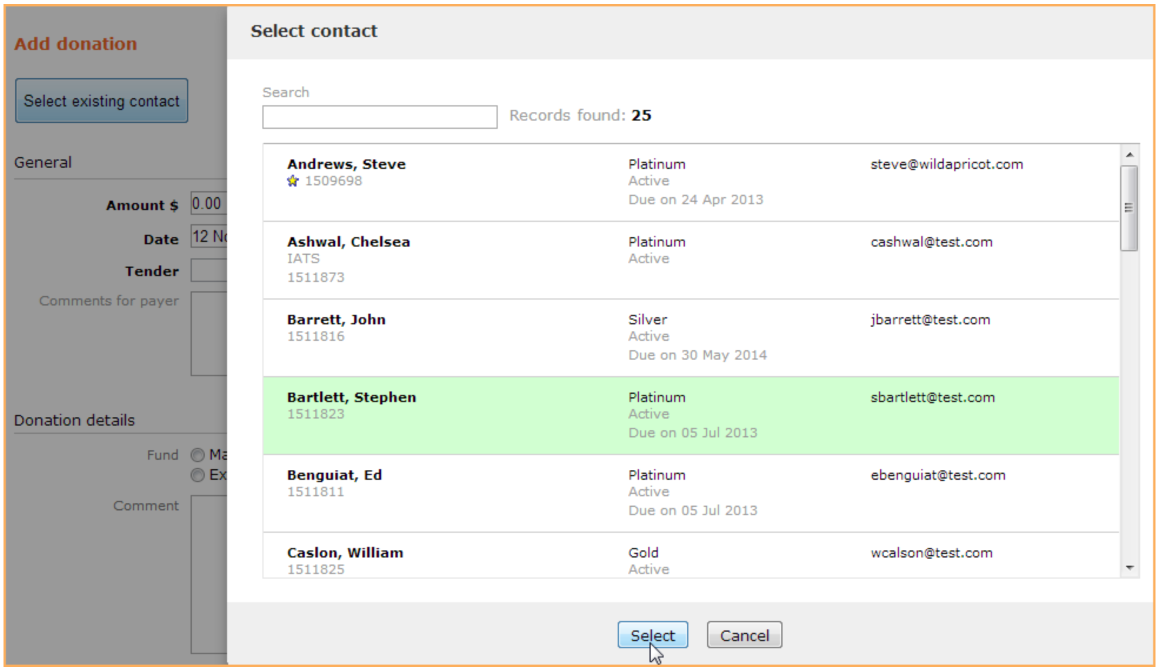
To manually record a donation, follow these steps:

1. Go to the Donations module.
2. Click the **Record donation** button.

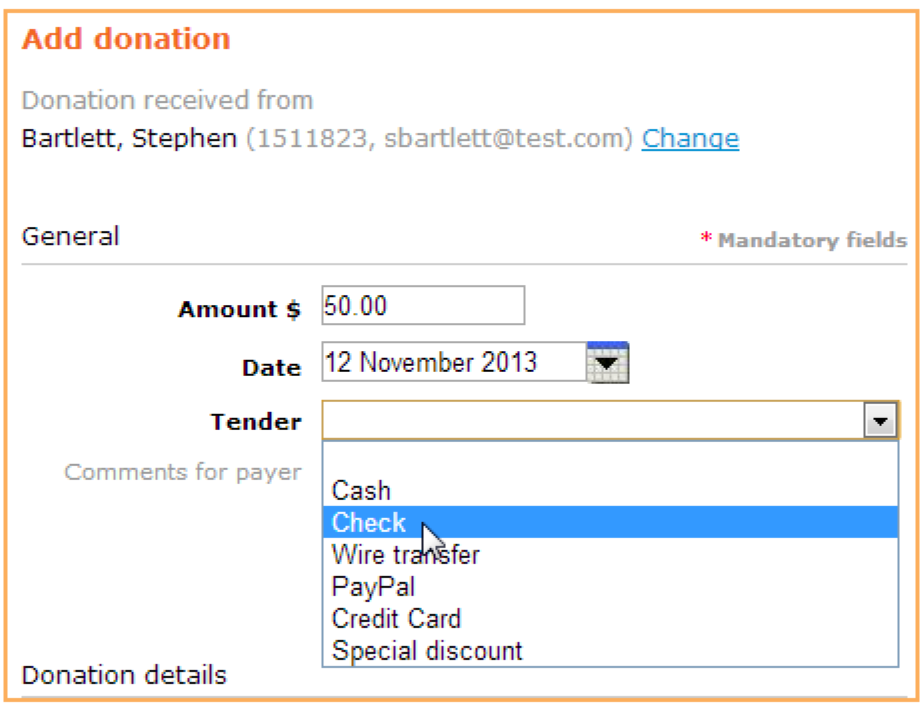


3. From the Add Donation screen that appears, click the **Select existing contact** button and select the contact who made the

donation.



4. Enter the amount of the donation.
5. Select the date of the donation.
6. Optionally, choose a tender method – the way in which the donation payment was received.



7. Enter any comments or notes regarding the donation.
8. Complete any custom donation fields that were added to the donation form.
9. Click the **Save** button.

The donation has now been recorded, and the details of the donation are now displayed. The following options are available from the donation details screen:

Option	Description

Preview & print	Print the donation receipt.
Donation receipt	Email the donation receipt. A donation receipt is not sent automatically when you manually record a donation. You can customize the email message before sending it.
Edit	Modify the donation details. See below for more information on modifying donations.
Refund	Refund the donation. See below for more information on refunding donations.
Delete	Delete the donation. See below for more information on deleting donations.

A confirmation email is not sent to the donor when a donation is added manually.

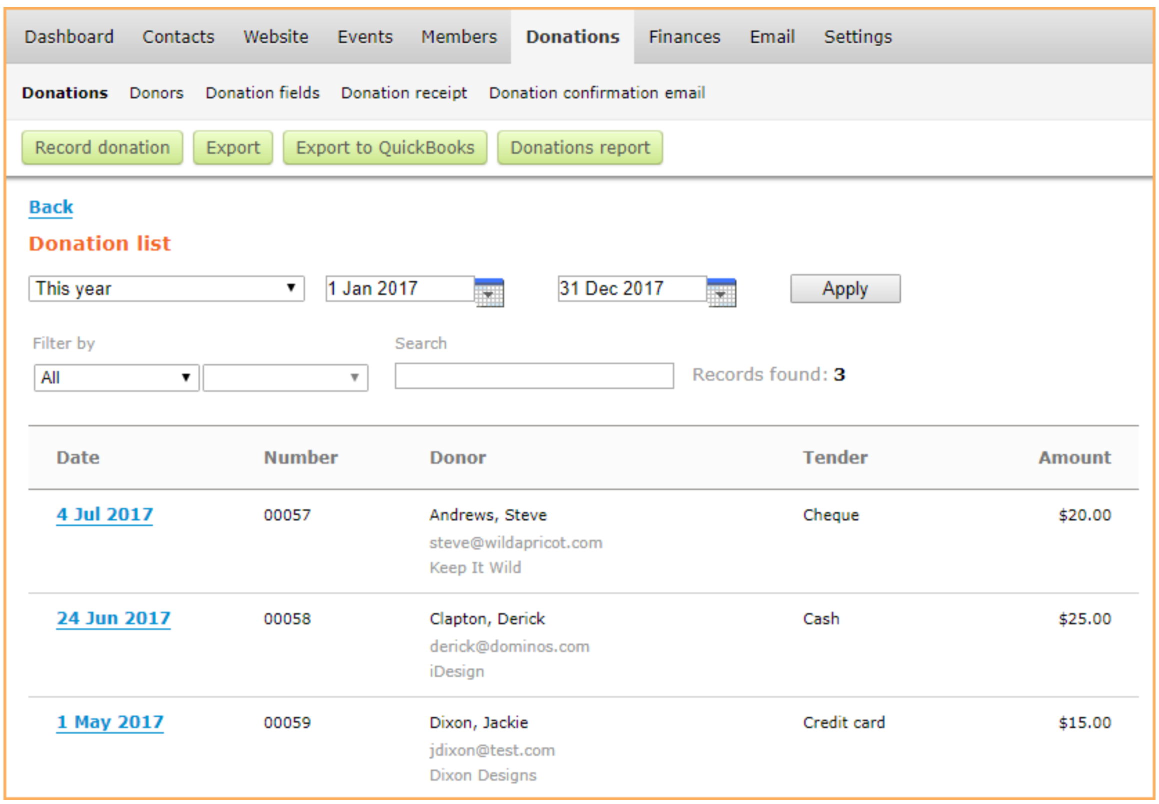
Displaying donations

You can display a list of individual donations, a list of donors, or all the individual donations for a particular donor.

Displaying individual donations

Read more/less

To display a list of individual donations, click the **Donations** menu. From the Donation module, you'll see a list of donations in chronological order.



The list includes donations made through a donation form on your website and donations recorded manually by an administrator. Multiple donations by the same donor are recorded separately.

For each donation, the following information is displayed:

Column	Description

Date	Date of the donation, plus payment details for online payments or any internal notes recorded by the administrator.
Number	Donation receipt number.
Donor	Donor's name and email.
Tender	How the donation payment was made. See Payment tenders.
Amount	The amount of the donation.

To view the details of a particular donation, click it within the list.

The following options are available from the donation list:

Option	**Description**
Record donation	Manually record a donation.
Export to Excel	Export the list as a spreadsheet to Excel.
Export to QuickBooks	Export the list to QuickBooks.
Donations report	Generate a graphical summary of your donations. See Donation reports.

You can filter the donations list in a number of different ways. You can:

- Select or specify a date filter
- Selecting a filter from the **Filter** drop-down
- Type text to be matched in the **Search** field

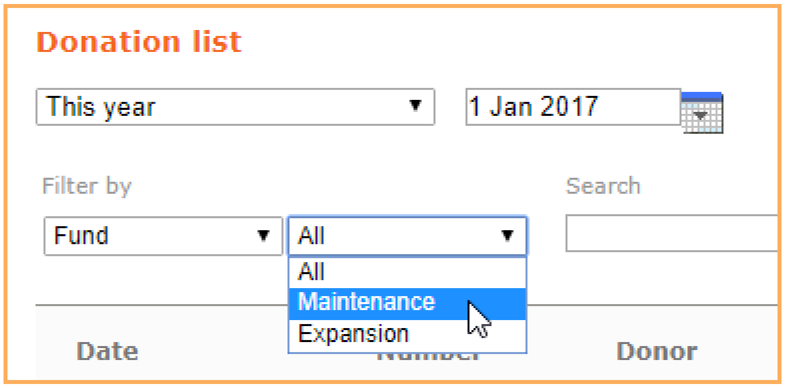
After selecting or entering a date range, click the **Apply** button to apply the range.

The following filters are available from the **Filters** dropdown:

Filter	**Description**
All	All donations.
Online payment	Donations submitted online, excluding those recorded manually.
Attention required	Donations that are likely abandoned. You may wish to delete these donations using the instructions below.
In progress	Donations that were initiated but not completed, typically because of payment issues (e.g. client card client, no response from payment processor, etc.)

Refunded	Donations that were refunded.
Tender	Donations made using a particular tender method.
Donation fields	Any custom donation field of the dropdown or radio buttons type.

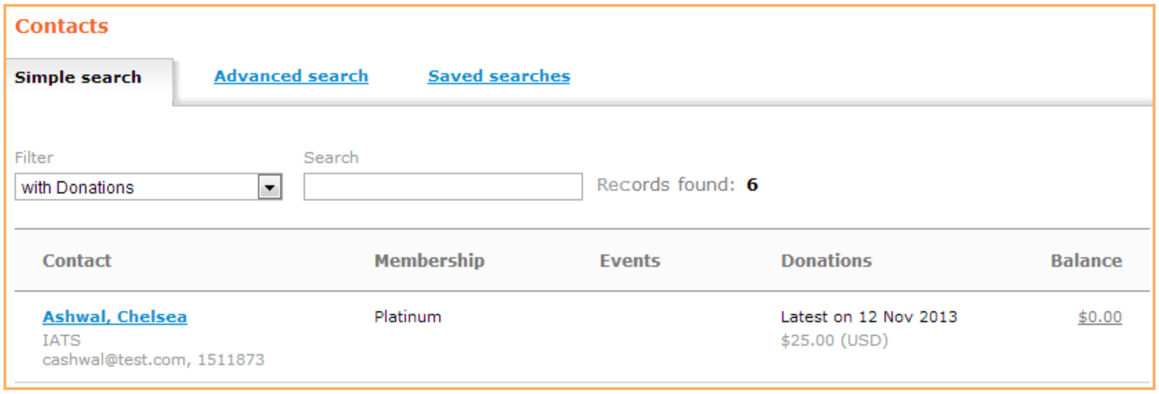
If you select Tender or a donation field as the filter, you can select a specific value from the second **Filter by** dropdown.



Displaying donors

Read more/less

To display a list of donors, click the **Donors** option under the Donations menu.



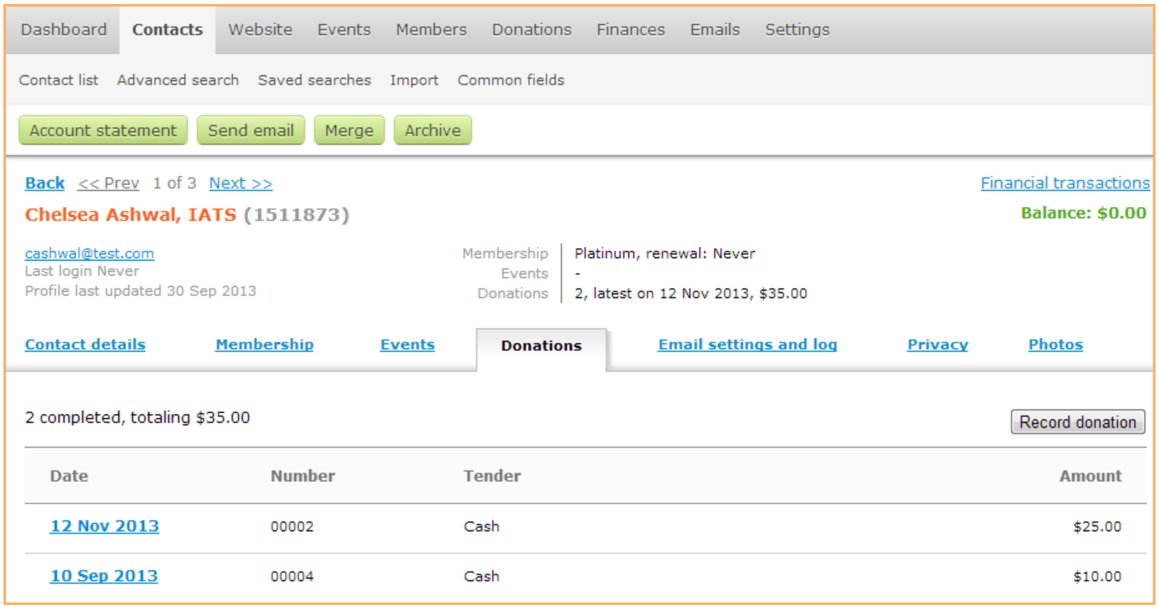
Note that this is your contacts list filtered using the **with Donations** filter.

You can perform a keyword search to search for specific donors within the list. You can export this list to a spreadsheet or use it as the basis for an email blast. Clicking a donor within the list will take you to their contact record.

Displaying a contact's donation history

Read more/less

To view a list of all donations made by a particular contact, go to the contact's contact record and click the **Donations** tab.



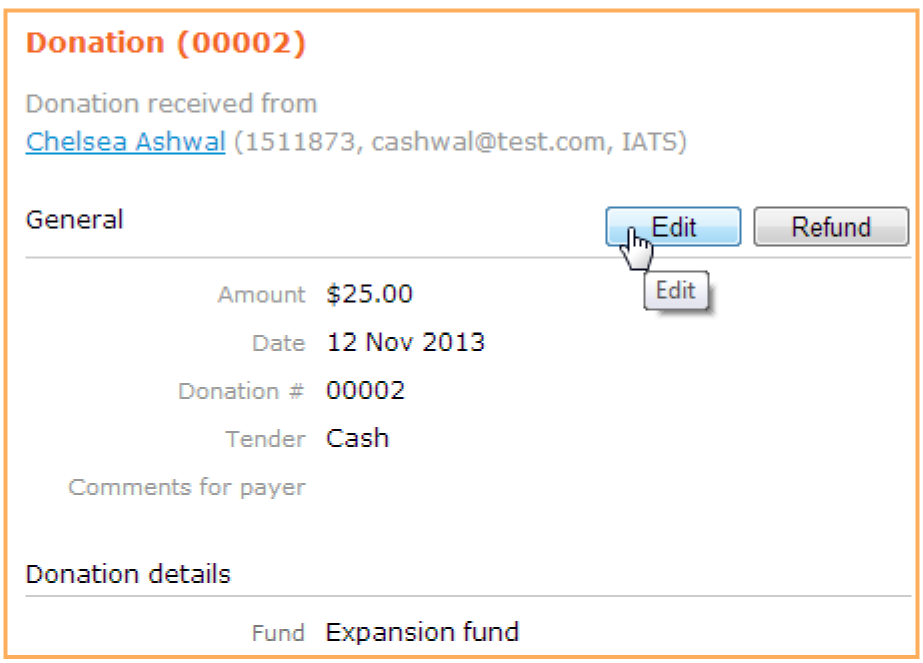
To record another donation for this contact, click the **Record donation** button.

To view the details of a particular donation, click it within the list. From the donation details screen, you can modify, refund, or delete the donation.

Modifying a donation

To modify a donation, click the donation within the list then click either **Edit** button.

Read more/less



For each donation, you can change the donation amount, date, and tender, as well as any comments or values entered into custom donation fields.

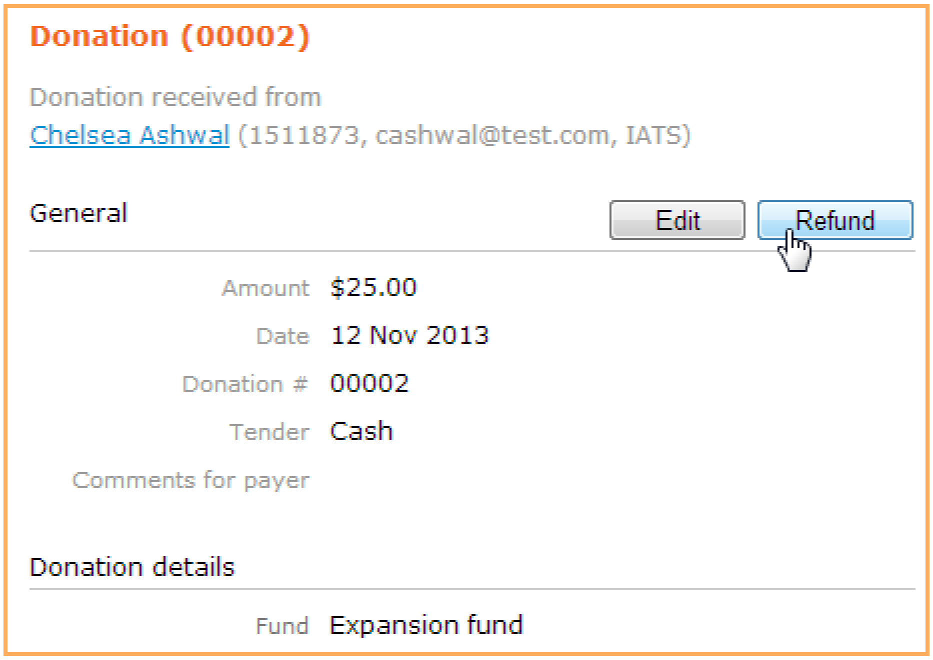
Refunding a donation

Refunding a donation is just like refunding any payment .

Read more/less

Recording a refund through Wild Apricot doesn't actually return the donation to the donor – it only makes a record of it in the system. To return an online refund, you need to do it from your payment gateway.

To refund a donation, click the donation within the list then click either **Refund** button.



On the donation screen, you can enter the amount and date of the refund, and the tender – the method by which the refund was issued. You can issue a full or partial refund.

After you click **Save**, the refund details screen appears. From here, you can print or email a refund note. Refund notes are not automatically emailed when you refund a donation.

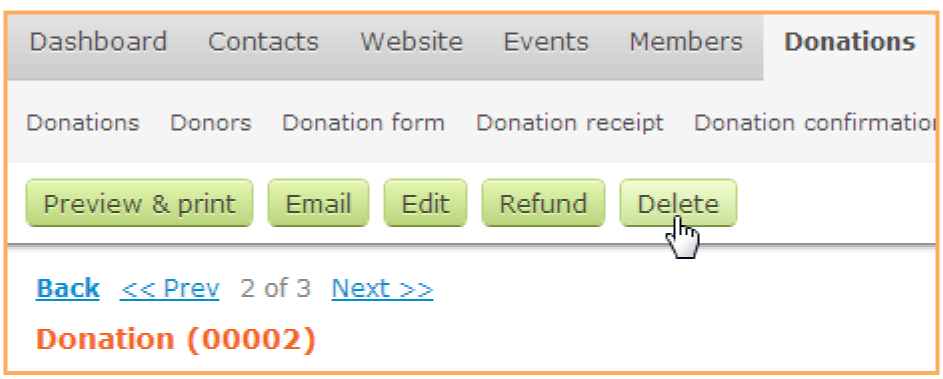
Fully refunded donations will still appear in the contact's donation history. You can click the entry within the donation history to view the details of the original donation. An entry for the refund itself will appear on the **Payments & refunds** screen within the Finances module.

Deleting a donation

Deleting a donation erases the donation record.

Read more/less

To delete a donation, click the donation within the list then click the **Delete** button.



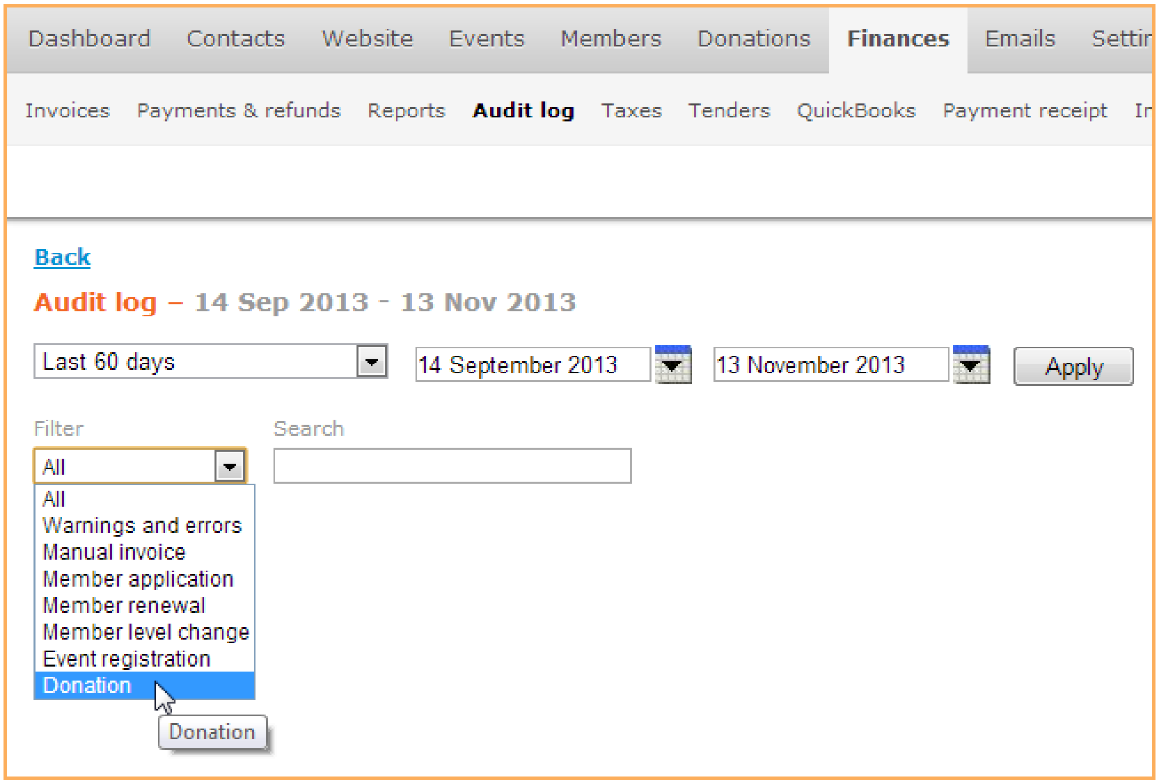
The deleted donation will no longer appear in the contact's donation history.

Tracking donation changes

Any and all changes to donation records – additions, modifications, deletions, and refunds – are automatically recorded in the audit log .

Read more/less

You can filter the audit log to display just donation changes by selecting the **Donations** filter.

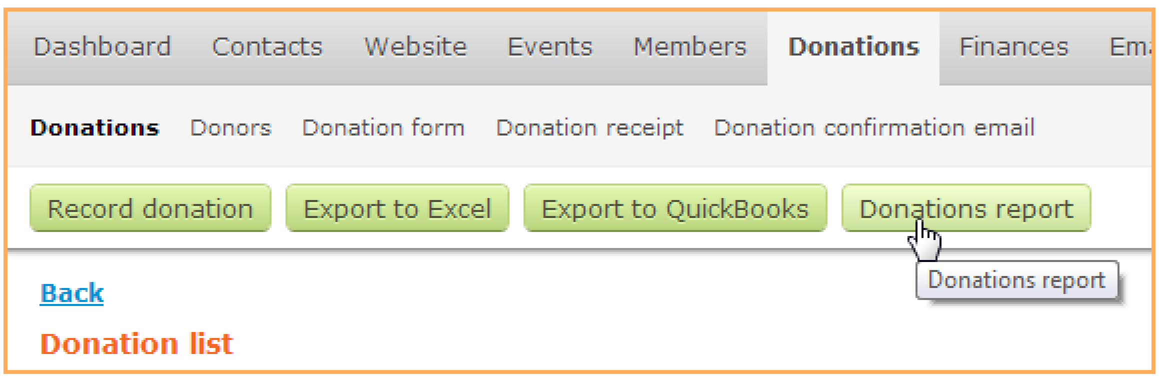


Donation reports

From the Finances module, you can display a graphical summary of your donations.

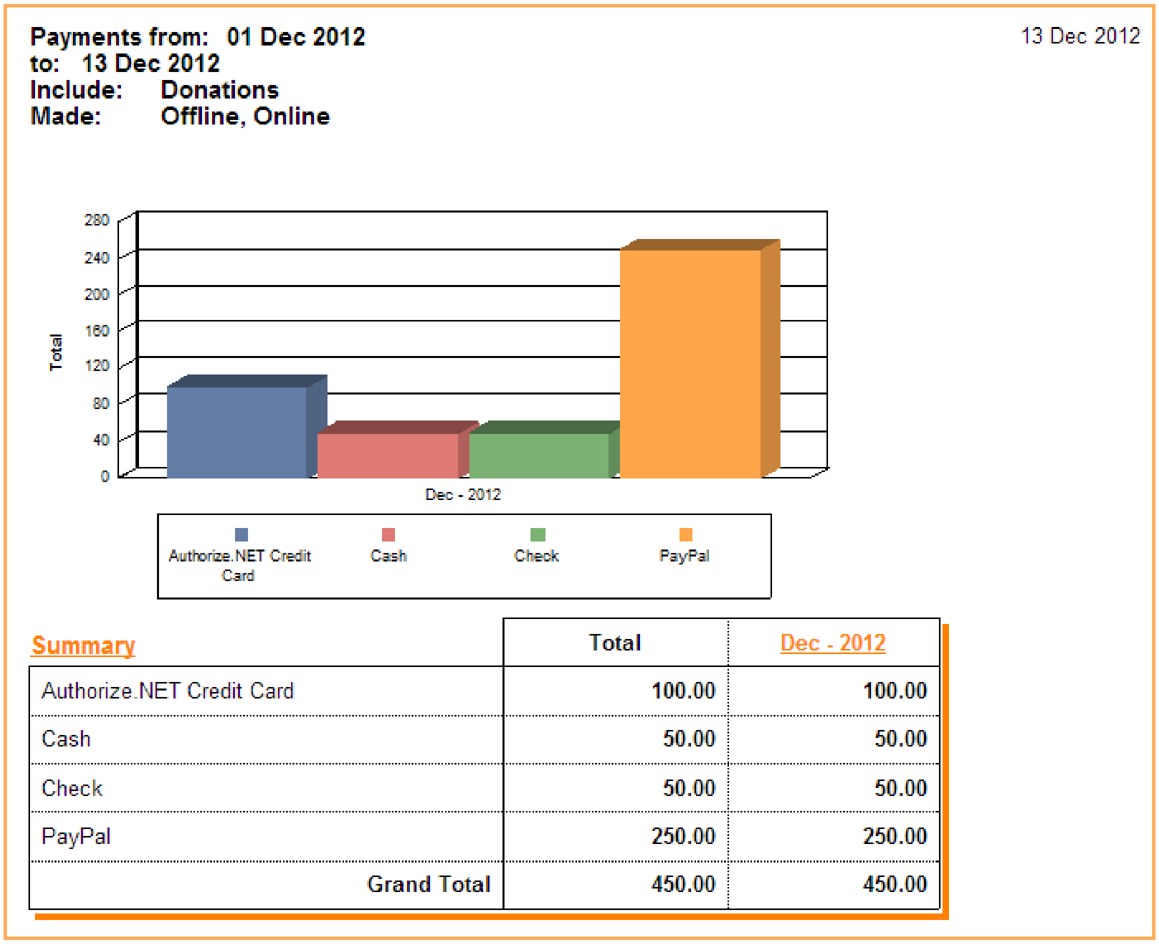
Read more/less

To generate a donations report, click the **Donations** option under the **Donations** menu then click the **Donations report** button.

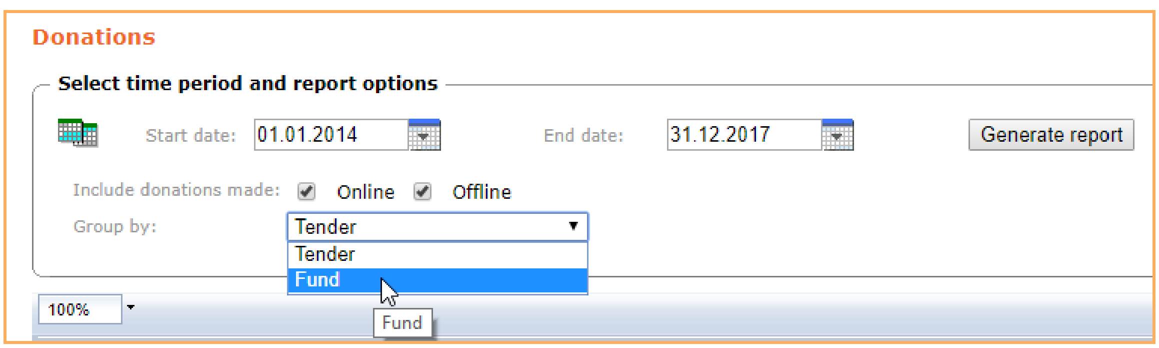


Alternatively, you can access this report by selecting the **Reports** option under the **Finances** menu.

The donations report shows a graphical breakdown of all donations by payment tender.



You can filter the report by date, and by online vs offline payments, and group the results by tender, or by any donation field of the dropdown or radio buttons type.



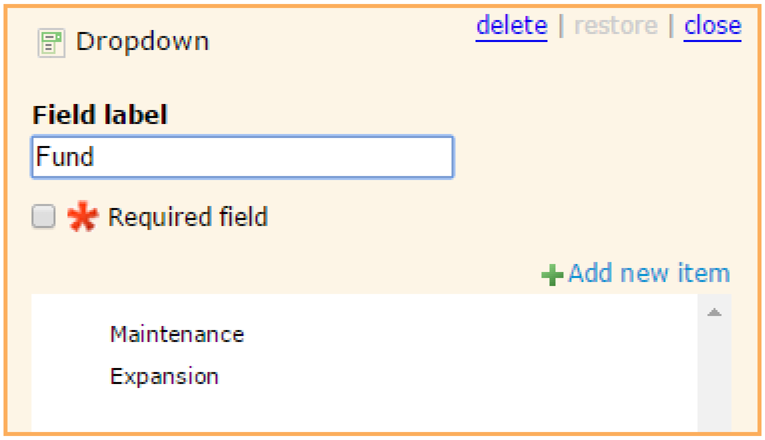
Managing multiple donation types

Your organization might want to distinguish between different kinds of donations, or direct donations towards different funds.

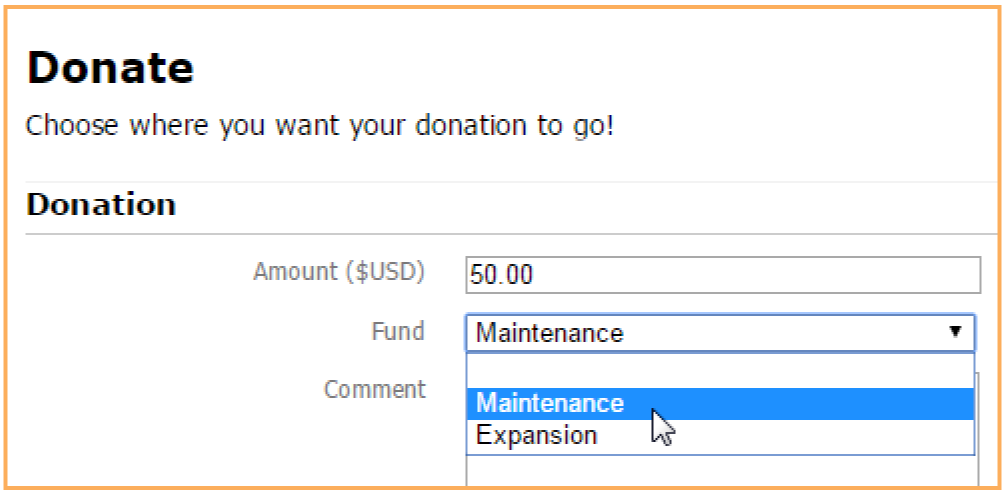
Read more/less

For example, you might be soliciting donations for both a maintenance fund and an expansion fund. To manage multiple donation types, follow these steps:

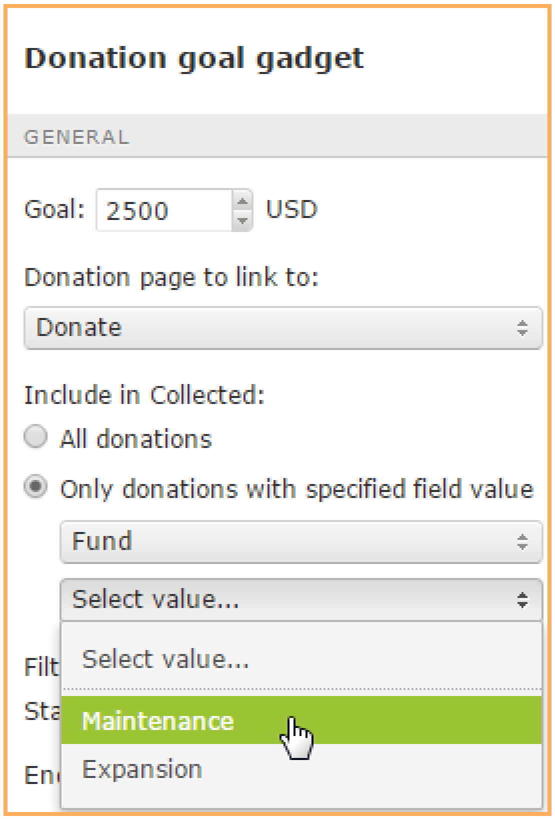
1. Set up a donation field to distinguish between the donation types. The field should be a required field, and should be a drop-down, radio buttons or multiple choice field, with the choices being the different donation types.



2. Add a donation gadget to a page, and add a content gadget instructing your donors to select the donation type.



3. To keep track of the fundraising progress for each donation type, add separate donation goal gadgets and point the **Include in Collected** setting to the appropriate donation type field value.



4. To keep track of the amounts raised for the different donation types, you can go to your donations list and export the list to an Excel spreadsheet. Within Excel, you can sort the spreadsheet by the donation type field value.

Recurring donations

Currently, Wild Apricot does not support recurring donations. As a workaround, you could create a dedicated membership level for donations, and enable recurring payments for that membership level.

Managing pledges

There is currently no way to properly track pledges in Wild Apricot. However, a workaround is available.

Read more/less

A donation is treated like payment received, without any accompanying invoice. Once you record a donation, it's considered received in full at that point.

One workaround you can use to record a pledge:

1. Create manual invoices and use them to track pledges.
2. Once the pledge payment is received, record it as usual, then settle it to the previously created pledge invoice.

> The downside of this approach is that these invoices and payments will not be included under donations in reporting but will be reported separately under payments.

On this page:

- Modifying a donation
- Refunding a donation
- Deleting a donation
- Tracking donation changes
- Donation reports
- Managing multiple donation types
- Recurring donations
- Managing pledges

Expand all sections

See also:

- Donation forms
- Donation goal gadget
- Customizing the donation confirmation email
- Personalized fundraiser pages
- Emailing or printing invoices and receipts
- Refunds
- Financial reports

Personalized fundraiser pages

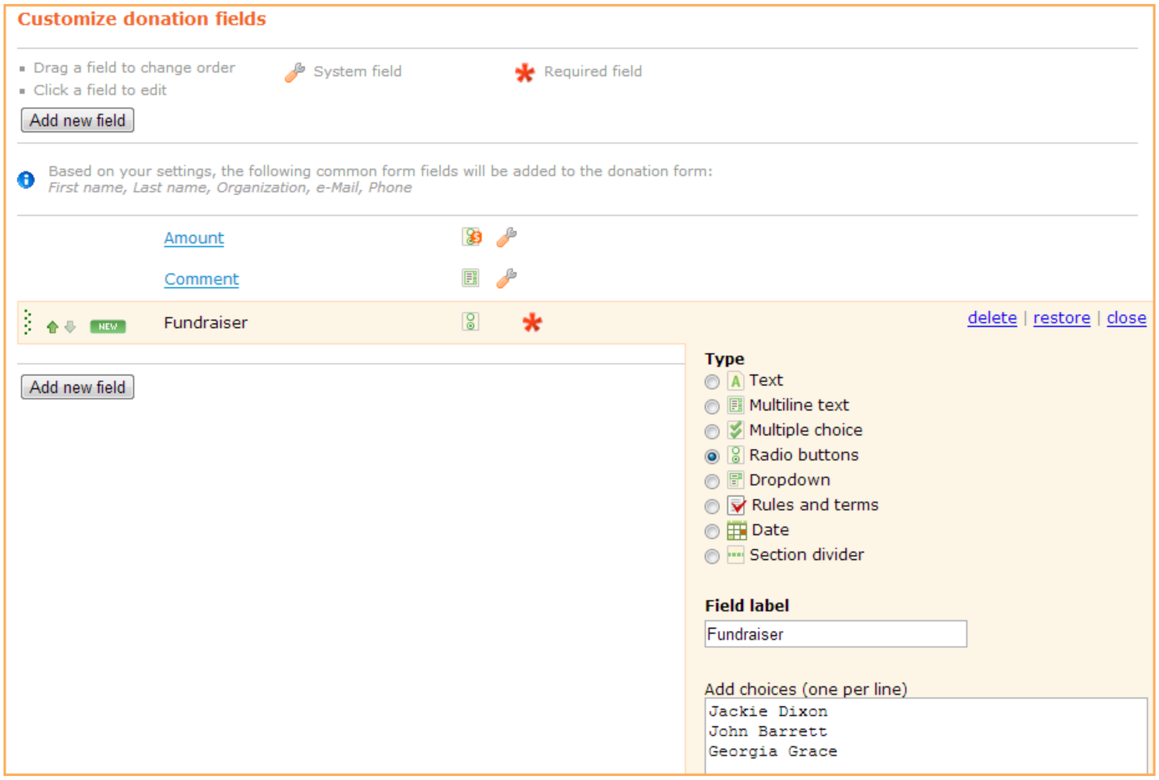
Creating personalized fundraiser pages

Some organizations have multiple fundraisers raising money at the same time – working on separate projects or in competition with each other on the same project. In this case, you might want to create separate personalized pages showing how much each fundraiser has raised.

To set up personalized fundraiser pages, follow these steps:

Step 1: Customize the donation fields

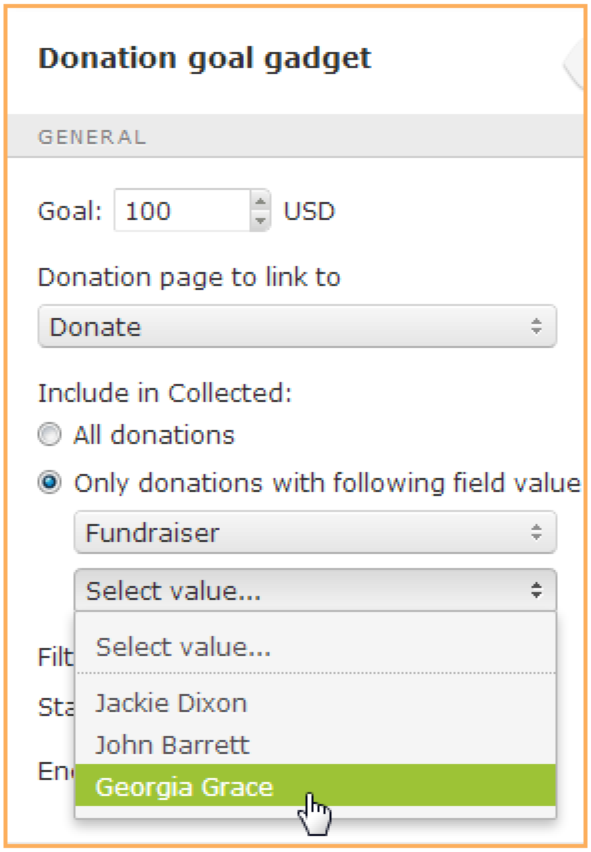
Suppose we have 3 fundraisers. Create a new donation field with a field type of **Radio buttons** – listing the names of the 3 fundraisers – and set it to be a required field.



To customize your donation fields, hover over the **Donations** menu and select the **Donation fields** option.

Step 2: Customize the fundraiser pages

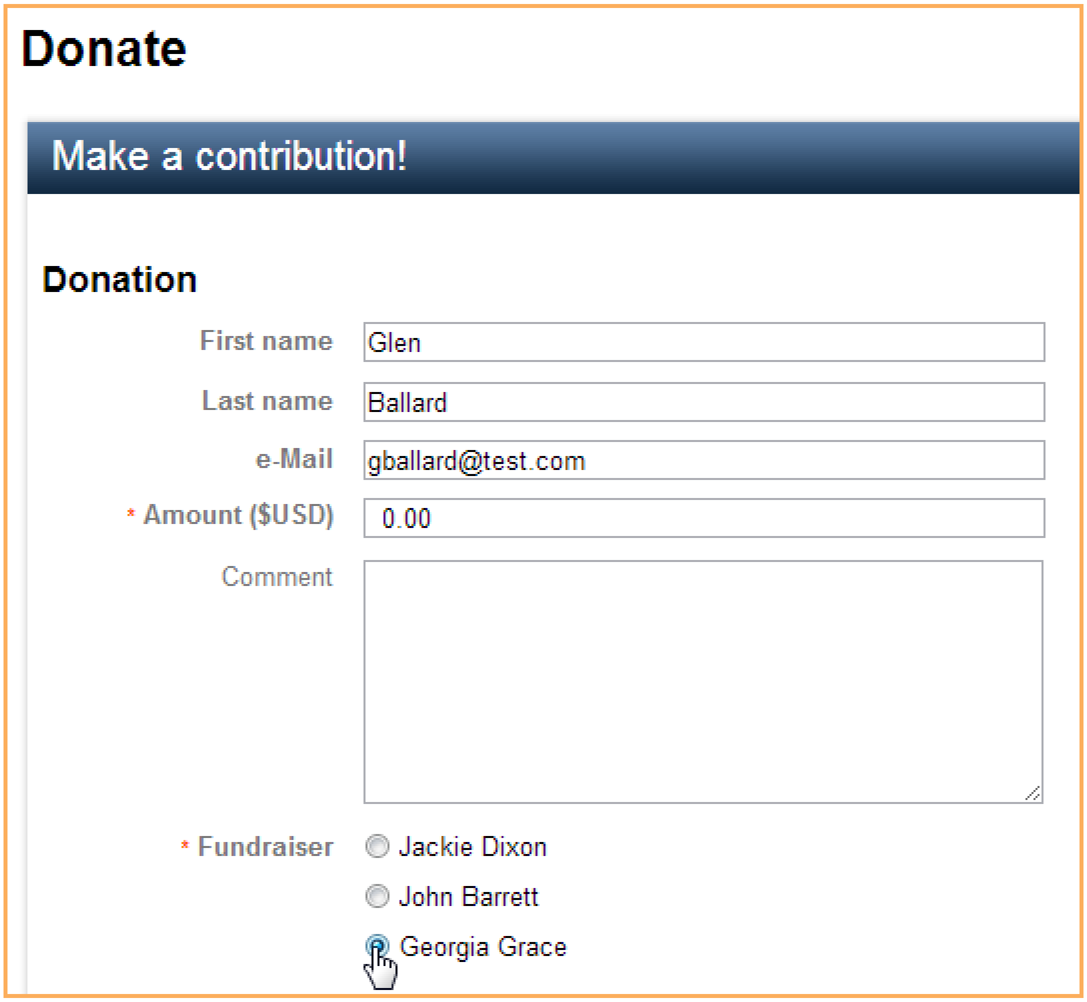
1. Add 3 new web pages, one for each fundraiser.
2. Add a donation goal gadget to each fundraiser page.
3. Modify the donation gadget settings to only count donations for that particular fundraiser.



4. Use a content gadget to add text, links, or images above and/or below the donation goal gadget.

Using the donation form

When your donors complete the donation form, they would select the appropriate fundraiser name:



On this page:

- Step 1: Customize the donation fields
- Step 2: Customize the fundraiser pages
- Using the donation form

See also:

- Managing donations

Setting up and applying taxes

Setting up and applying taxes

You can set up sales taxes (applied on top of your prices) or VAT (included in your prices) and apply them to transactions. You can automatically calculate taxes and show them on invoices, and run reports to show taxes billed or collected.

You can apply taxes to:

- membership invoices
- event invoices
- manual invoices

> You cannot apply taxes to donations.

What you need to know

Click/tap to expand/collapse

- Self service transactions that generate invoices (event registration, membership application, membership renewal, and membership level change) will calculate applicable taxes based on your tax settings. Manually created invoices will include an option to apply taxes to items on the invoice.
- You can set up multiple taxes and apply up to two taxes per transaction. Different tax combinations can be set up for different contact field values (e.g. purchaser state/province).
- You can also set up exceptions for different membership levels and event registration types. There are a number of scenarios where this level of flexibility would come in handy:
    - Some members are tax exempt, and you have grouped them in their own membership level.
    - You are treating recurring donations (which are not taxable) as a membership level.
    - You need to disable taxes for events taking place in certain locations

Tax settings

To set up taxes for your site, hover over the **Finances** menu and select the **Taxes** option. From the **Tax settings** page, you can:

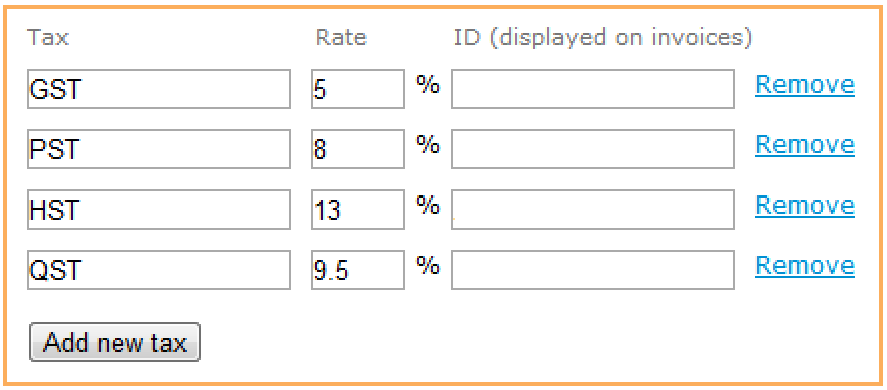
- add taxes and set tax rates
- choose between sales tax and VAT
- choose the default tax combination
- provide for different tax combinations to be applied based on a common field value

Adding and removing taxes

Click/tap to expand/collapse

To add a tax, click the **Add new tax** button. Enter the tax name, the tax rate, and your tax account ID (which will appear on invoices).

To remove a tax, click **Remove** beside the tax.



You can create any number of different taxes.

Tax policy: sales taxes or value-added tax?

Click/tap to expand/collapse

Under **Tax policy**, you indicate whether taxes are added to the total price during checkout (sales tax) or included in the total price (value-added tax or VAT). Sales taxes are typically used in Canada and the United States, while VAT is more common in European countries, as well as Russia, China, India, and Scandinavian countries.

Your choice will apply to all the taxes you have created.

Tax rules: how taxes are calculated

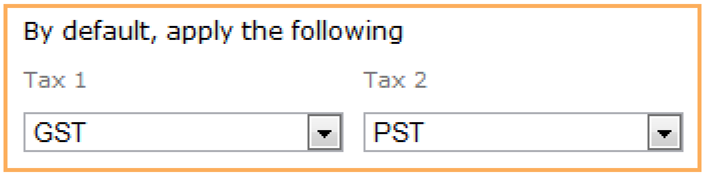
Click/tap to expand/collapse

After setting up your taxes and defining your tax policy, you can:

- choose the default tax combination
- set the conditions for overriding the default tax combination using common field values
- choose the types of invoices to which taxes apply

Choosing a default tax combination

You can choose up to 2 taxes to be applied by default, in the absence of any other overriding condition.

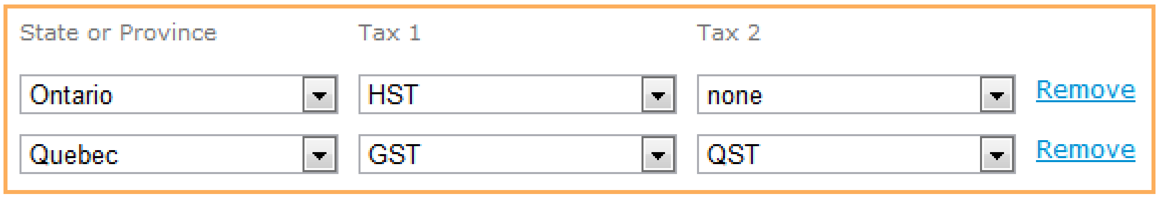


The taxes you select will be applied separately to the purchase price.

Overriding the default using common field values

Since sales taxes can vary from one jurisdiction to another, you can provide for different tax combinations to be applied based on the value of a common field. These settings will override the default tax combination.

For example, if you've set up a common field called State/Province, you can select this field then define different tax combinations for each state or province.



> ⚠ Only common fields whose field type is radio buttons or dropdown can be used.

To set the conditions for overriding the default tax combination, follow these steps:

1. Check the **Override default based on contact's common field** checkbox.
2. Choose the common field from the drop-down list (e.g. State or Province).
3. Choose a value for the common field (e.g. Quebec).
4. Choose up to 2 taxes to be applied to contacts with that common field value.
5. Click **Add rule** to choose taxes for other field values (e.g. Ontario).

Tax scope: choosing where to apply tax

Click/tap to expand/collapse

After you have set up the tax calculations, you can choose whether you want to apply them to membership invoices and event invoices. Regardless of your choices here, you can define exceptions for specific membership levels and event registration types.

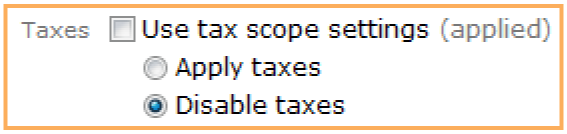
> ⓘ For manual invoices, taxes are selected while generating the invoice.

When you are done setting up your taxes, click **Save changes**.

Setting tax exceptions

For each membership level and event registration type, you can choose whether to follow the tax scope settings, or ignore the tax scope and apply or disable tax for this membership level or event registration type.

Read more/less



You can make this choice on the **General** tab for each membership level, and when adding or editing an event registration type.

If you enable **Use tax scope settings**…	Taxes will be applied to invoices for this membership level or registration type according to your tax scope settings. If the word *(applied)* appears at the end of the option, then tax has been enabled for this invoice type.
If you disable **Use tax scope settings**…	You can override your tax scope settings by clicking the **Enable taxes** or **Disable taxes** option. If the word *(applied)* appears at the end of the **Use tax scope settings** option, you can click **Disable taxes** below to disable taxes for this membership level or registration type. If the word *(disabled)* appears, you can enable taxes for this membership level or registration type by clicking **Enable taxes**.
If you choose **Disable taxes**…	Taxes will be **not** applied to this membership level or event registration type regardless of any other tax setting.
If you choose **Apply taxes**…	Taxes will be applied to this membership level or event registration type regardless of any other tax setting. Taxes will be applied according to your tax settings.

After you have made your choice, click **Save**.

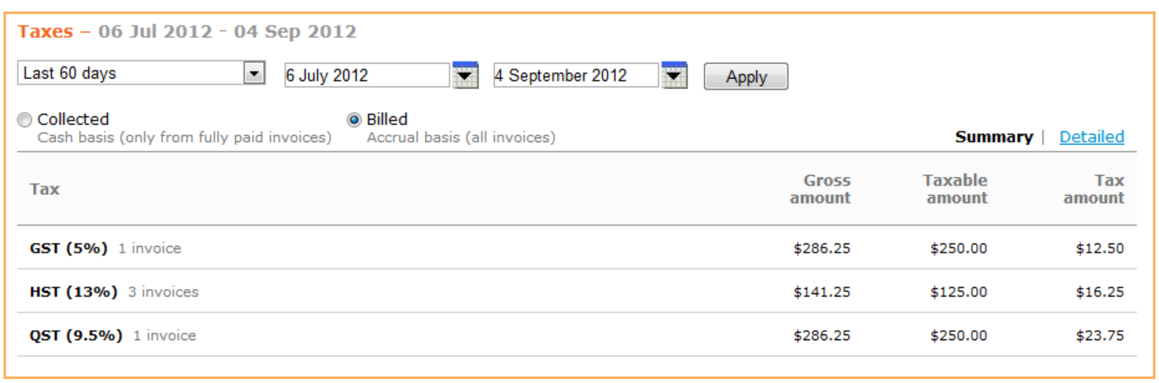
Tax reports

You can generate reports summarizing or detailing the taxes billed and collected during different time periods.

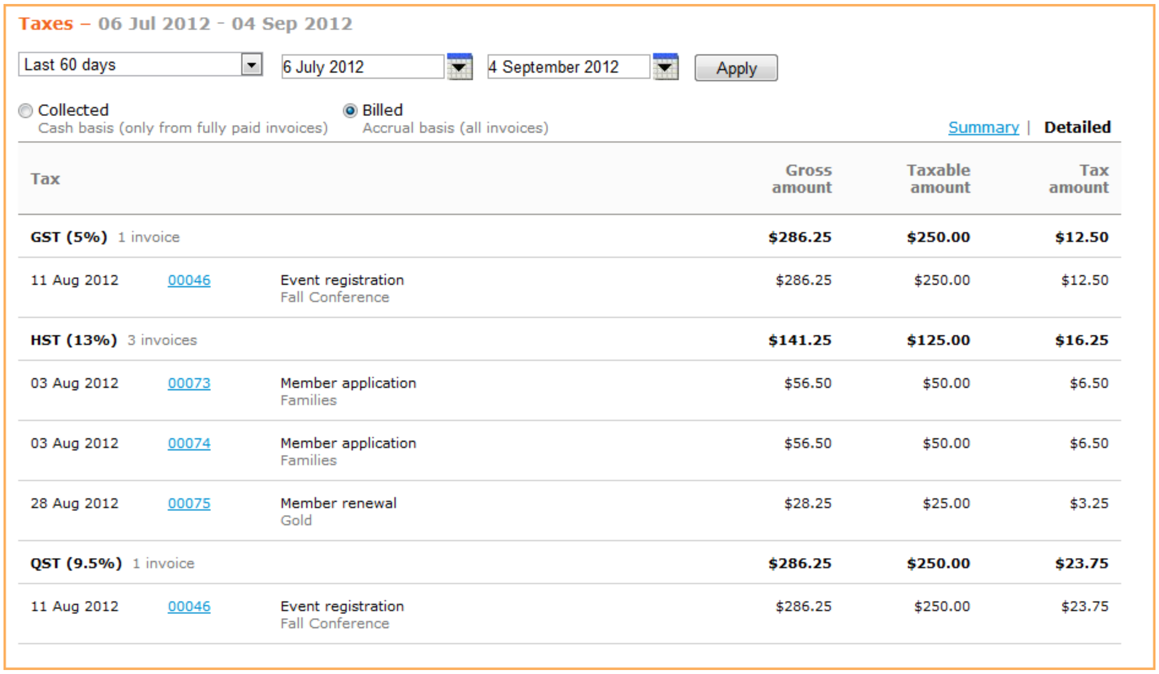
Read more/less

To generate a tax report, hover over the **Finances** menu and select the **Reports** option. Within the report list, click the **Taxes** link.

By default, a summary report is displayed.



To view a detailed report, displaying individual entries for each invoice, click **Detailed**.



By default, the detailed tax report shows the gross amount billed, the taxable amount, and the amount of tax billed (from all invoices, whether they have been paid or not). To view the amount collected (from **fully paid** invoices only), click **Collected**.

You can filter the report by date. You can select from one of the predefined date filters (last 60 days, this month, this year, last month, last year), or use the calendar controls to select your own date range.

You can export the tax report to a PDF file or to an Excel file.

Limitations and workarounds

Compound tax

Wild Apricot does not currently support *compound tax*, where a tax is calculated on the subtotal after another tax has been applied, instead of separately on the gross amount billed. If you live in a jurisdiction that applies a compound tax, you can adjust the percentage of your second tax to take the compounding effect into account. For example, if the first tax is 5% and the second tax is 10%, you can set the second tax to 10.5% to achieve the compounding effect. The formula for this is:

```
CompoundTax2 = Tax2 + (Tax1 / Tax2)
```

On this page:

Expand all sections

Financial reports

Financial reports

From the Finances module, you can generate various financial reports to help you manage your organization's finances. You can generate the following kinds of reports:

- Income report – summary of your income based on the invoices in the system within a selected period and by transaction type.
- Payments report – summary of payments, donations and refunds, in other words your cashflow transactions. Based on the payments and refunds in the system, within a selected period and by tender type.
- Aging receivables – list of all contacts with outstanding balances classified by outstanding days.
- Account statement – statement report for a particular account – list and totals of invoices, payments, refunds and donations.
- Tax reports – for taxes billed and collected during different time periods.

You can also generate financial reports specific to donations and events from other Wild Apricot modules:

- Donations report – similar to the payments report but filtered to display donations only
- Event payments report – shows each event's registrations, fees, and payment received broken down by registration type

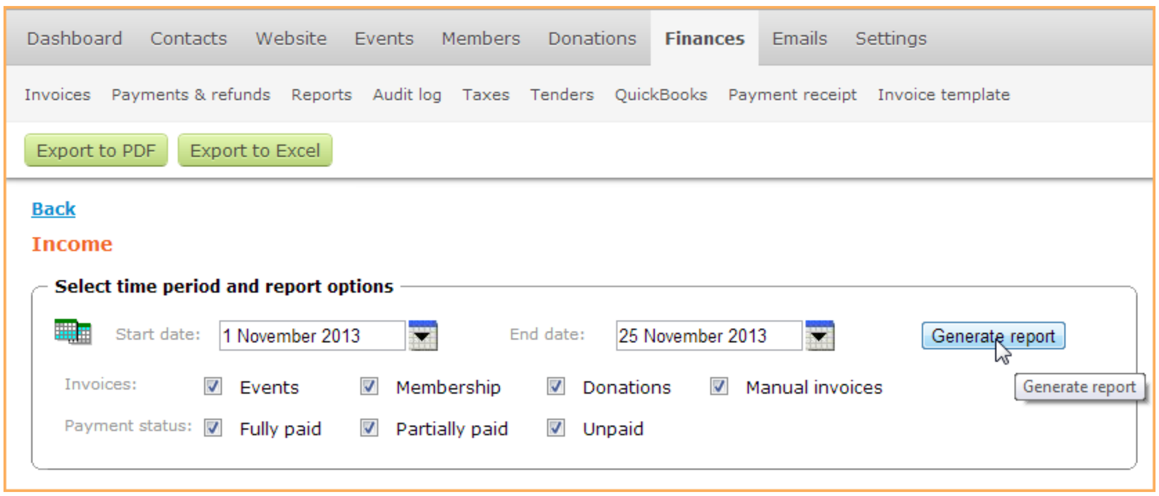
These reports can be exported to Excel or to PDF format.

Income report

The income report is a summary of all your income, based on the invoices in the system (see Invoices).

To generate an income report, follow these steps:
Read more/less

1. Hover over the **Finances** menu and select the **Reports** option.
2. Click the **Income** link.
3. Select the date range – when the income was recorded or received.
4. Select the invoice/payment type(s) you are interested in. You can filter the report by invoice origin – events, payments, donations, or manually created invoices – or by payment status – fully paid, partially paid or unpaid.

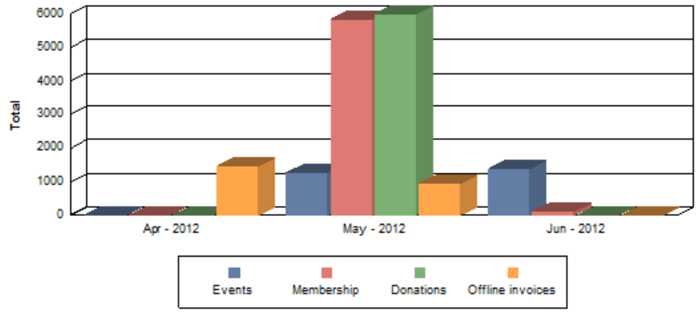


5. Click **Generate report**.

The report displays a graphical breakdown of all the income by source...

01 Apr 2012 to 01 Jul 2012
Events, Membership, Donations, Offline invoices
All invoices

27 Nov 2012



Summary	Total	Apr - 2012	May - 2012	Jun - 2012
Events	**2,655.50**		1,271.25	1,384.25
Membership	**5,961.08**		5,830.75	130.33
Donations	**6,000.00**		6,000.00	
Offline invoices	**2,426.85**	1,469.00	946.55	11.30
Grand Total	**17,043.43**	**1,469.00**	**14,048.55**	**1,525.88**

...followed by a breakdown of income from memberships and events.

Events	Total	May - 2012	Jun - 2012
Annual General Meeting	**508.50**	508.50	
Fall Conference	**2,147.00**	762.75	1,384.25
Total	**2,655.50**	**1,271.25**	**1,384.25**

Membership		Total	May - 2012	Jun - 2012
Deleted	Renewals	**1,130.00**	1,130.00	
	Total	**1,130.00**	1,130.00	
Bronze	New	**525.83**	452.00	73.83
	Total	**525.83**	452.00	73.83
Gold	New	**1,472.75**	1,416.25	56.50
	Total	**1,472.75**	1,416.25	56.50
Silver	New	**2,832.50**	2,832.50	
	Total	**2,832.50**	2,832.50	
	Total	**5,961.08**	**5,830.75**	**130.33**

Payments report

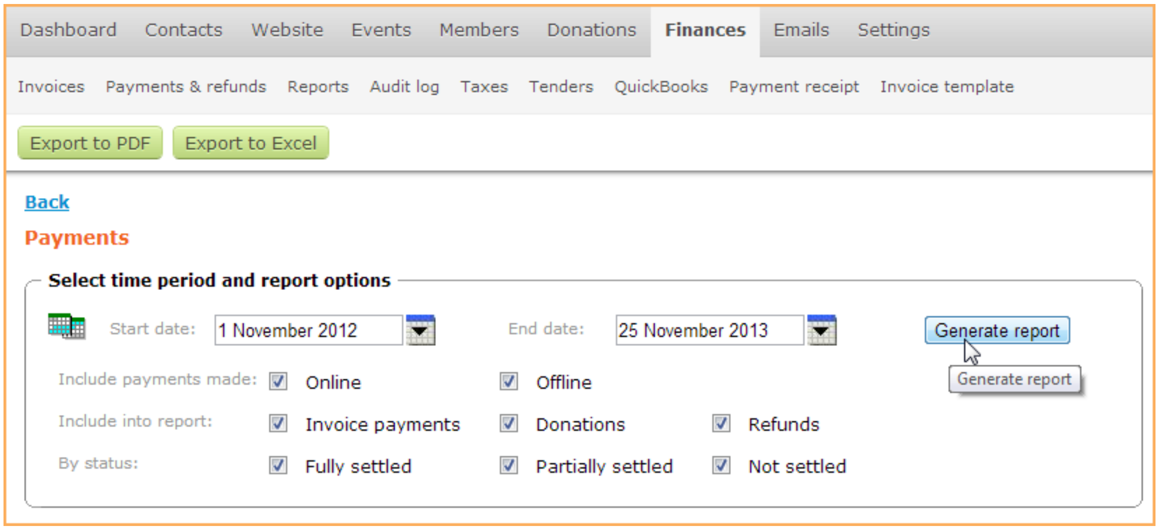
The payments report displays a summary of payments, donations, and refunds – i.e. your cash flow transactions – based on the payments and refunds in the system (see payments overview).

To generate a payments report, follow these steps:

Read more/less

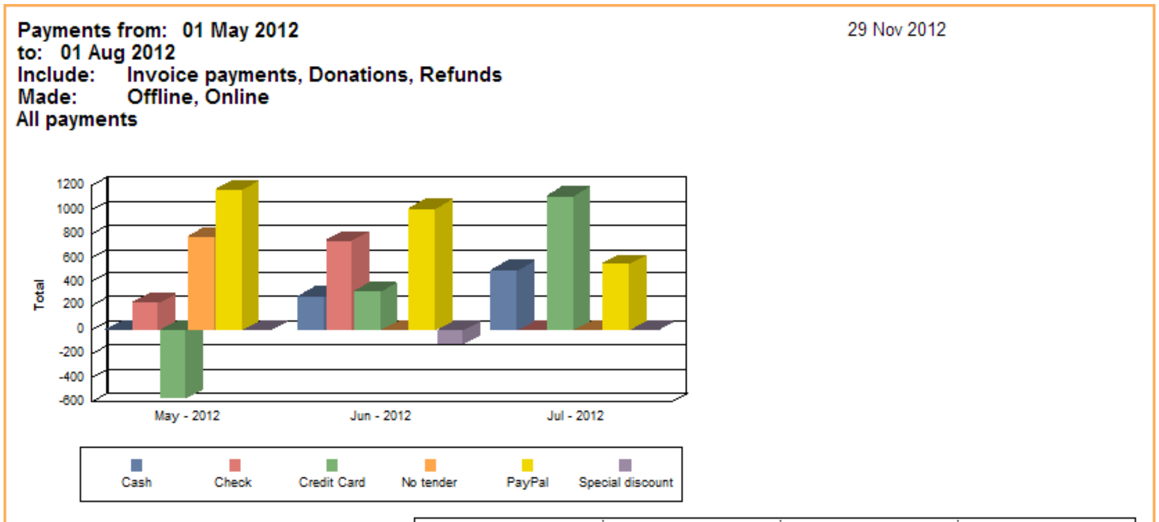
1. Hover over the **Finances** menu and select the **Reports** option.
2. Click the **Payments** link.

3. Select the date range – when the payments were recorded or made.
4. Select the invoice/payment type(s) you are interested in. You can filter the report by online vs offline payments, payment type – invoices, donations, and refunds – and by payment status – fully paid, partially paid or unpaid.



5. Click **Generate report**.

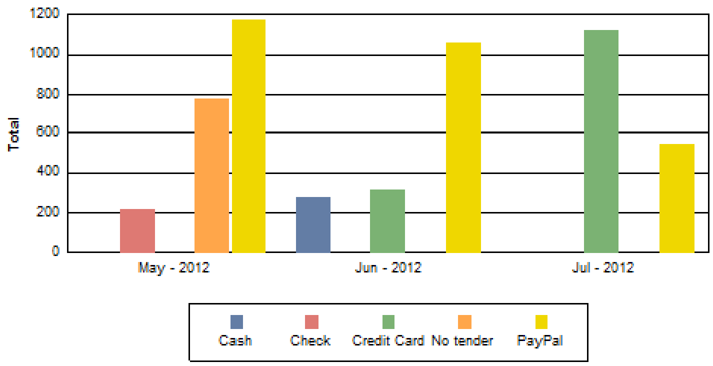
The generated payment report shows a graphical breakdown of all the payments by payment tender.



Summary	Total	May - 2012	Jun - 2012	Jul - 2012
Cash	782.50	0.00	282.50	500.00
Check	976.00	226.00	750.00	0.00
Credit Card	876.60	-565.00	322.05	1,119.55
No tender	778.00	778.00	0.00	0.00
PayPal	2,734.60	1,169.55	1,017.00	548.05
Special discount	-113.00	0.00	-113.00	0.00
Grand Total	6,034.70	1,608.55	2,258.55	2,167.60

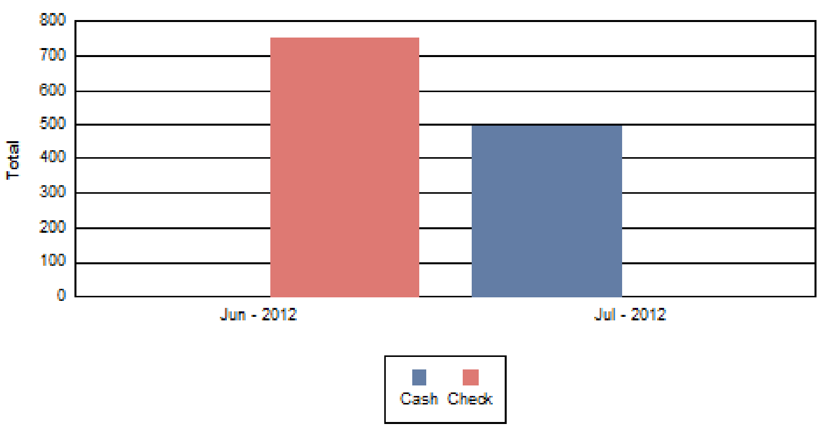
The report is further broken down by invoiced payments, donations, and refunds.

Invoice payments



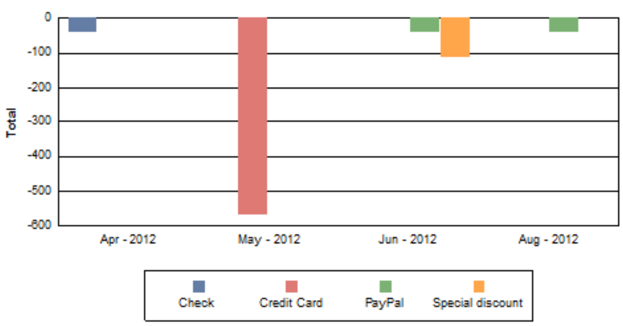
	Total	May - 2012	Jun - 2012	Jul - 2012
Cash	282.50	0.00	282.50	0.00
Check	226.00	226.00	0.00	0.00
Credit Card	1,441.60	0.00	322.05	1,119.55
No tender	778.00	778.00	0.00	0.00
PayPal	2,774.15	1,169.55	1,056.55	548.05
Total	5,502.25	2,173.55	1,661.10	1,667.60

Donations



	Total	Jun - 2012	Jul - 2012
Cash	500.00	0.00	500.00
Check	750.00	750.00	0.00
Total	1,250.00	750.00	500.00

Refunds



	Total	Apr - 2012	May - 2012	Jun - 2012	Aug - 2012
Check	-39.55	-39.55	0.00	0.00	0.00
Credit Card	-565.00	0.00	-565.00	0.00	0.00
PayPal	-79.10	0.00	0.00	-39.55	-39.55
Special discount	-113.00	0.00	0.00	-113.00	0.00
Total	-796.65	-39.55	-565.00	-152.55	-39.55

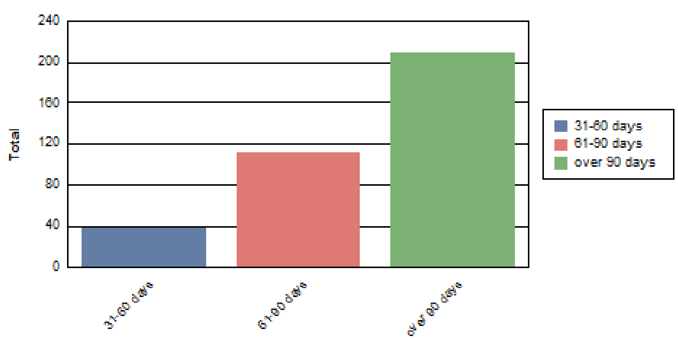
Aging receivables report

The aging receivables report is a list of all contacts with outstanding balances, broken down by the number of days that the balance has been outstanding-- 30, 60, 90 and over 90 days due.

Read more/less

Aging receivables - as of 27 Nov 2012

27 Nov 2012



	0-30 days	31-60 days	60-90 days	over 90 days	Total
Richards Mark			113.00		113.00
Grace Georgia				113.00	113.00
Rivera Diego				62.15	62.15
Headley Alvin		39.55			39.55
Mann Terence				33.90	33.90
Total		39.55	113.00	209.05	361.60

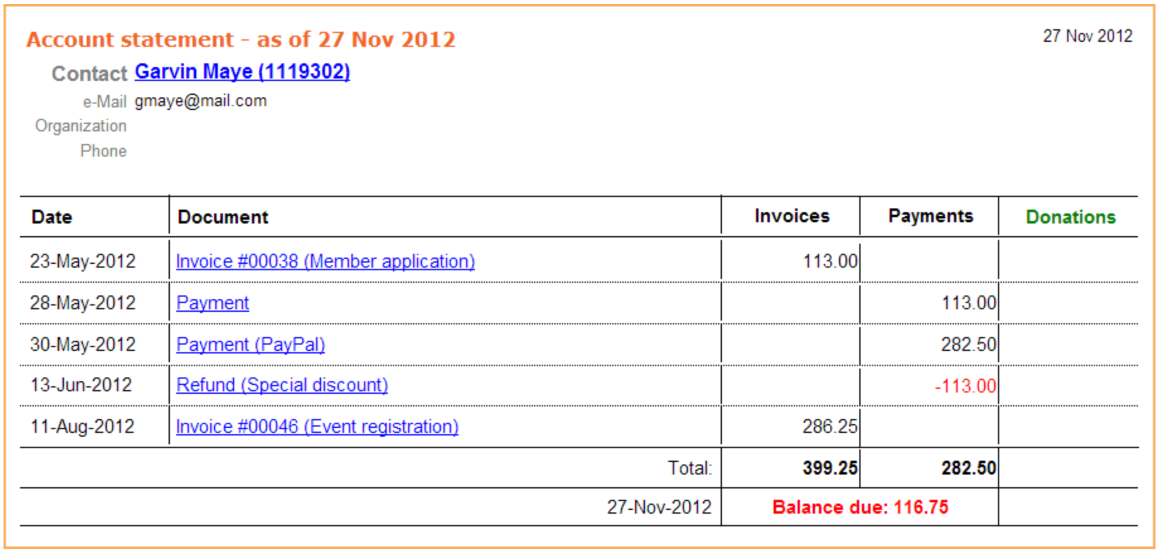
To generate an aging receivables report, follow these steps:

1. Hover over the **Finances** menu and select the **Reports** option.
2. Click the **Aging receivables** link.

Account statement

An account statement lists invoices, payments, refunds, and donations for a particular contact.

Read more/less



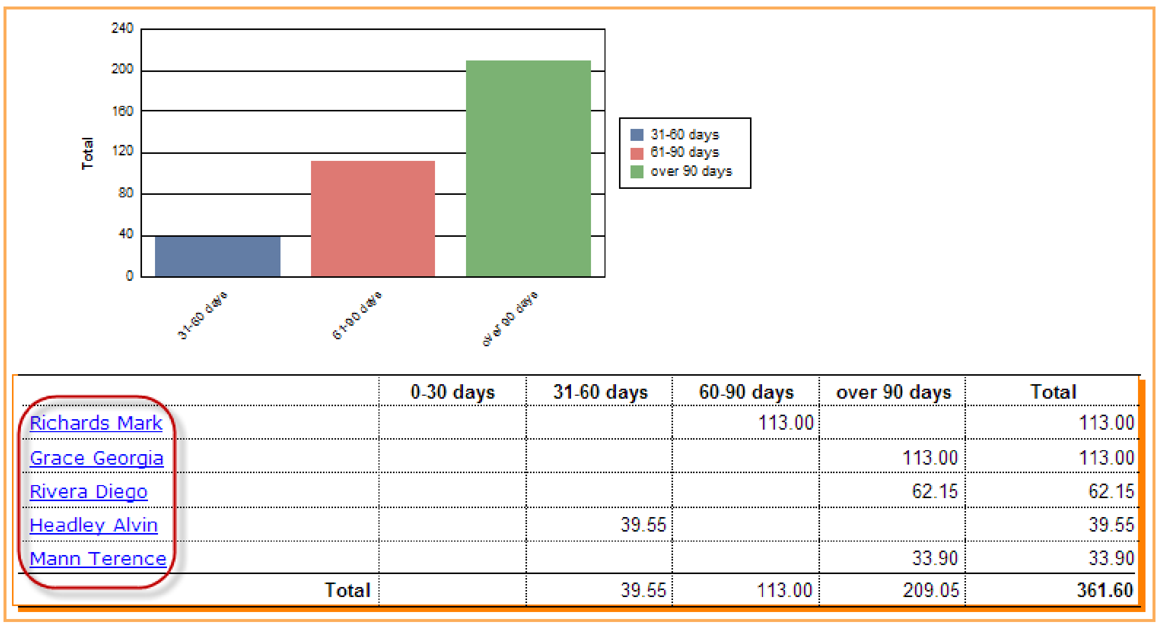
Account statement - as of 27 Nov 2012 27 Nov 2012

Contact Garvin Maye (1119302)
e-Mail gmaye@mail.com
Organization
Phone

Date	Document	Invoices	Payments	Donations
23-May-2012	Invoice #00038 (Member application)	113.00		
28-May-2012	Payment		113.00	
30-May-2012	Payment (PayPal)		282.50	
13-Jun-2012	Refund (Special discount)		-113.00	
11-Aug-2012	Invoice #00046 (Event registration)	286.25		
	Total:	**399.25**	**282.50**	
	27-Nov-2012	**Balance due: 116.75**		

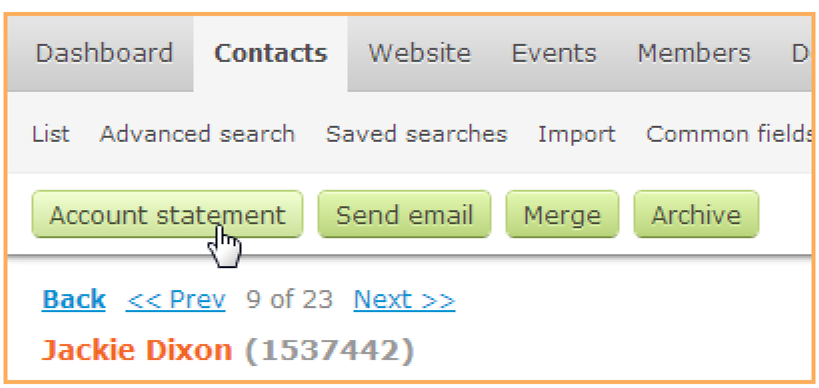
There are two different ways to display an account statement for a contact:

- From the aging receivables list, click on the contact's name to bring up their account statement.



	0-30 days	31-60 days	60-90 days	over 90 days	Total
Richards Mark			113.00		113.00
Grace Georgia				113.00	113.00
Rivera Diego				62.15	62.15
Headley Alvin		39.55			39.55
Mann Terence				33.90	33.90
Total		39.55	113.00	209.05	**361.60**

- From a contact's record, click the **Account statement** button.



Taxes report

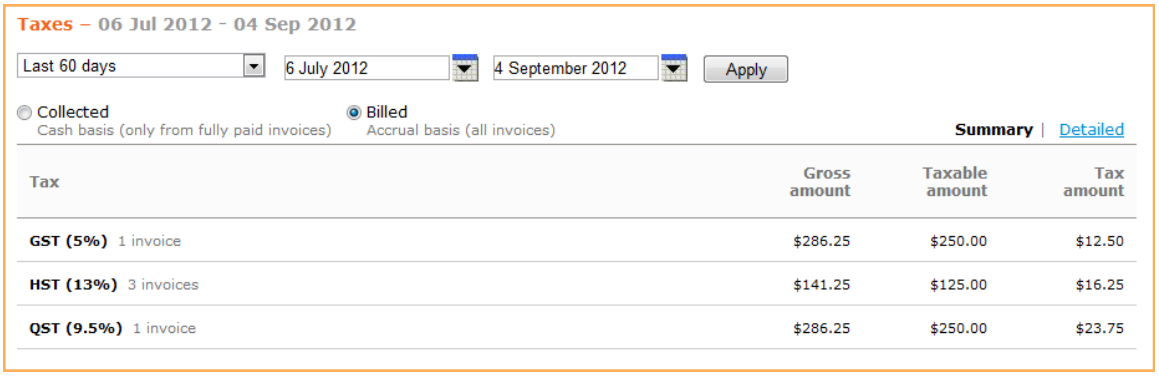
The taxes report shows the taxes billed and collected during different time periods.

To generate a tax report, follow these steps:

Read more/less

1. Hover over the **Finances** menu and select the **Reports** option.
2. Click the **Taxes** link.

By default, a summary report is displayed.



Taxes – 06 Jul 2012 - 04 Sep 2012

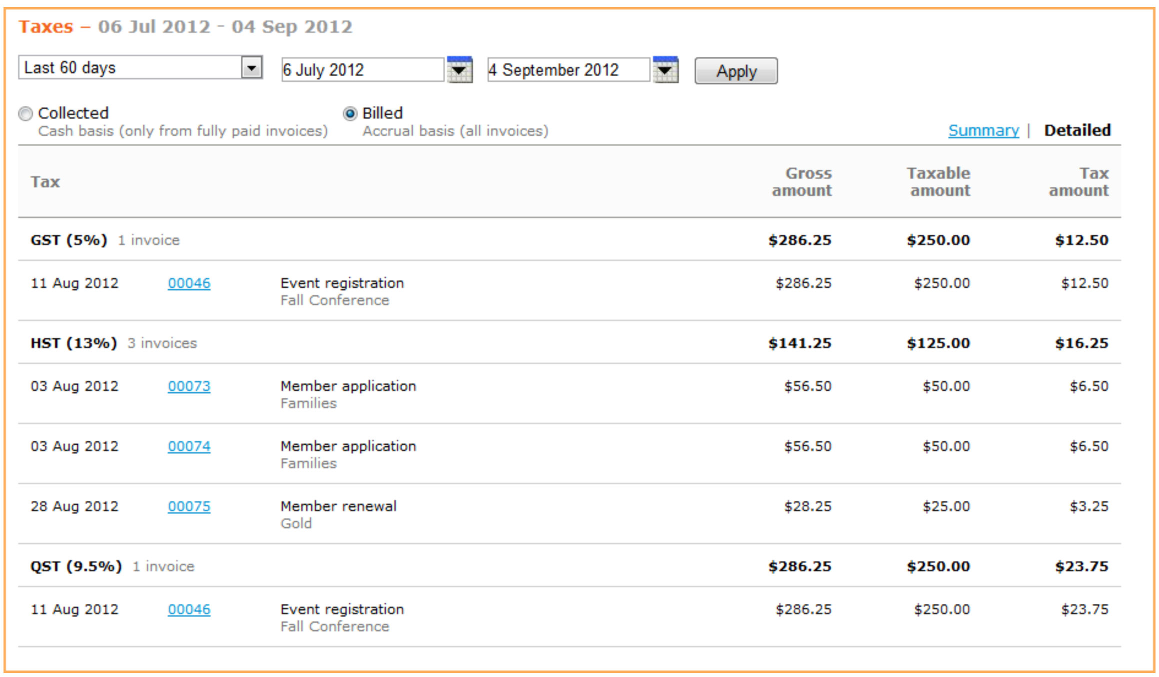
Last 60 days | 6 July 2012 | 4 September 2012 | Apply

Collected — Cash basis (only from fully paid invoices)
Billed — Accrual basis (all invoices)

Summary | Detailed

Tax	Gross amount	Taxable amount	Tax amount
GST (5%) 1 invoice	$286.25	$250.00	$12.50
HST (13%) 3 invoices	$141.25	$125.00	$16.25
QST (9.5%) 1 invoice	$286.25	$250.00	$23.75

To view a detailed report, displaying individual entries for each invoice, click **Detailed**.



Taxes – 06 Jul 2012 - 04 Sep 2012

Last 60 days | 6 July 2012 | 4 September 2012 | Apply

Collected — Cash basis (only from fully paid invoices)
Billed — Accrual basis (all invoices)

Summary | Detailed

Tax			Gross amount	Taxable amount	Tax amount
GST (5%) 1 invoice			**$286.25**	**$250.00**	**$12.50**
11 Aug 2012	00046	Event registration Fall Conference	$286.25	$250.00	$12.50
HST (13%) 3 invoices			**$141.25**	**$125.00**	**$16.25**
03 Aug 2012	00073	Member application Families	$56.50	$50.00	$6.50
03 Aug 2012	00074	Member application Families	$56.50	$50.00	$6.50
28 Aug 2012	00075	Member renewal Gold	$28.25	$25.00	$3.25
QST (9.5%) 1 invoice			**$286.25**	**$250.00**	**$23.75**
11 Aug 2012	00046	Event registration Fall Conference	$286.25	$250.00	$23.75

By default, the detailed tax report shows the gross amount billed, the taxable amount, and the amount of tax billed (from all invoices, whether they have been paid or not). To view the amount collected (from **fully paid** invoices only), click **Collected**.

You can filter the report by date. You can select from one of the predefined date filters (last 60 days, this month, this year, last month, last year), or use the calendar controls to select your own date range.

On this page:

Expand all sections

Audit log

Audit log

The audit log records all the key financial transactions on your account, including:

- the creation of invoices and receipts
- the processing, modification, or deletion of payments, and
- the issuing of refunds.

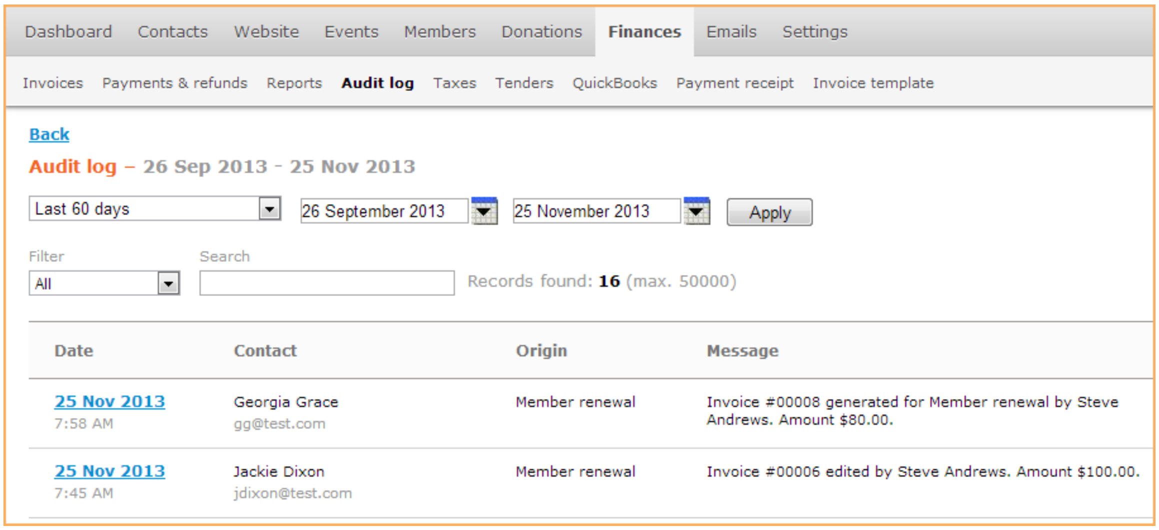
The primary purpose of the audit log is for troubleshooting – to help you figure out why a particular transaction took place.

> ⓘ You cannot delete entries from the audit log.

Viewing the audit log

To view the audit log, hover over the **Finances** menu and select the **Audit log** option.

Read more/less



For each entry, the following information is displayed:

Column	Description
Date	The date and time the activity was recorded. The date and time are displaying using the timezone defined in your organization details.
Contact	Name and email of contact associated with the transaction.
Origin	Type of transaction that triggered the log entry.
Message	A summary of the transaction that took place.

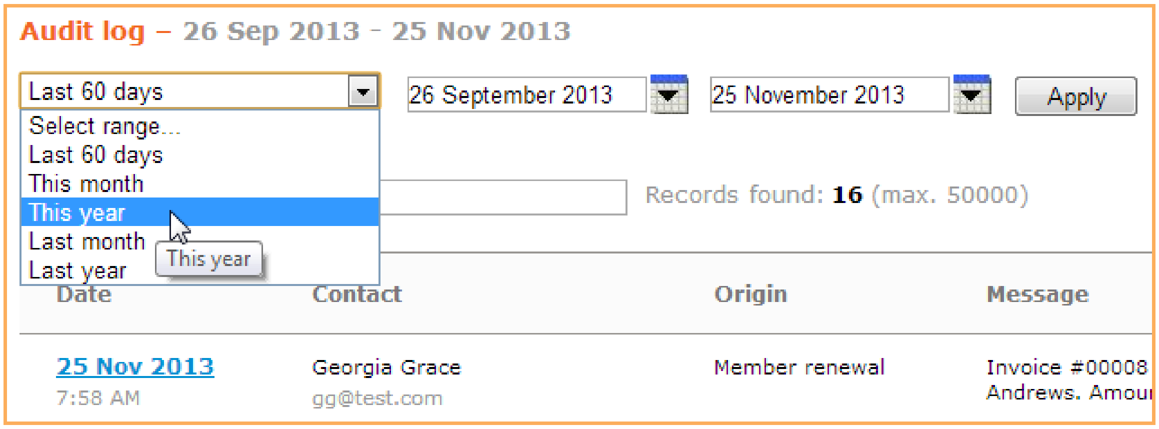
There is no limit on the number of transactions that can be stored in your audit log. There is a limit of 50,000 on the number of transactions that can be retrieved and displayed on the audit log at any one time. To view any additional transactions, you can apply a date filter or another filter to narrow down the search.

Filtering the audit log

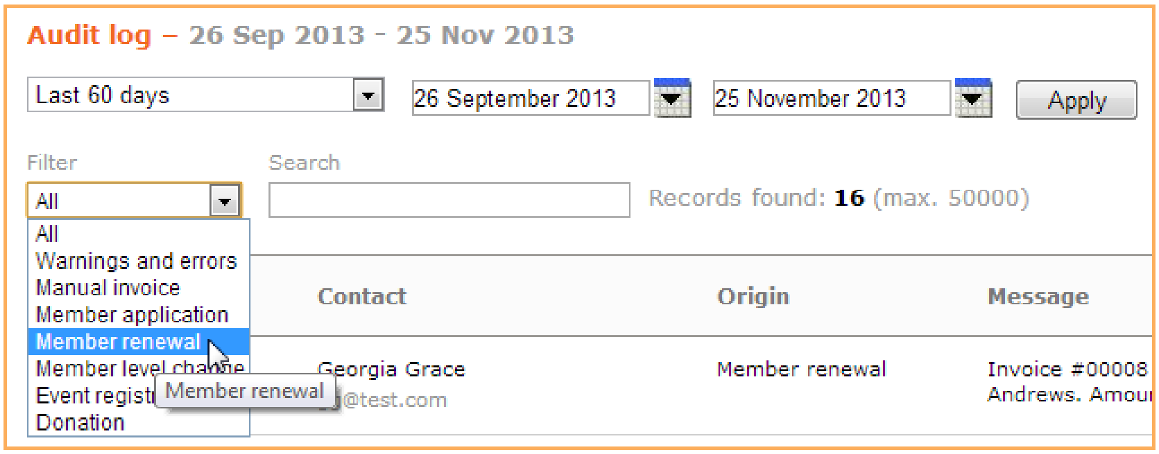
The log can be filtered by date, by transaction type, or by entering a search keyword.

Read more/less

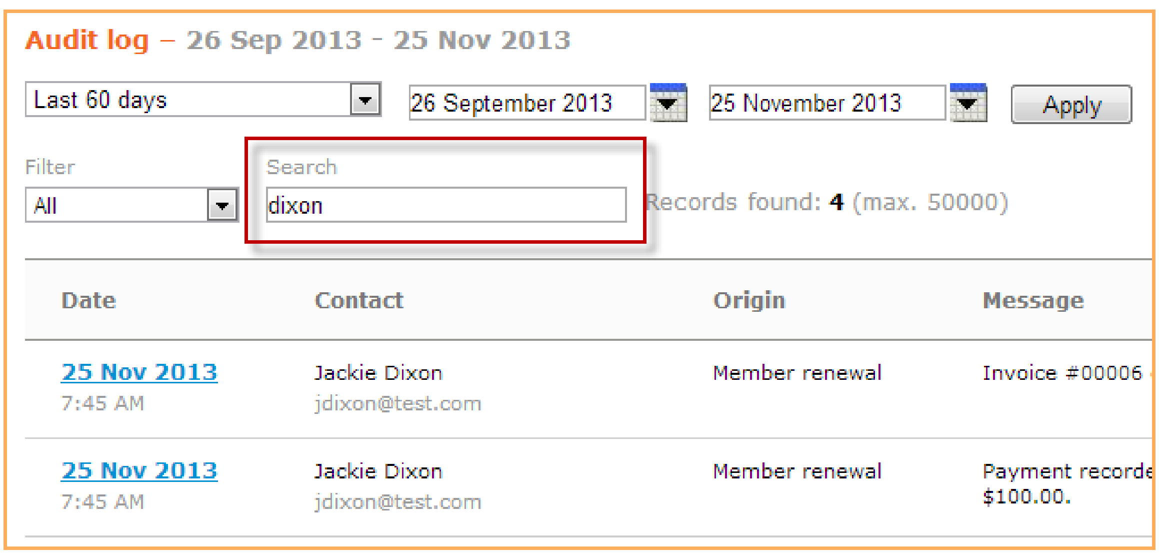
To filter the audit log by date, select a predefined date range from the **Select range** drop down, or enter the start and end dates of the range in the two date fields to the right. In either case, click the **Apply** button to apply the date filter.



To filter the log by transaction type, click the **Filter** drop-down and select the type of transaction you want to view.



If you want to view transactions for a particular contact, you can enter their name or email address, or any other identifier, in the **Search** fi eld.



Viewing entry details

To view details for a particular audit log entry, click on the entry within the log. For different kinds of activities, the following information is logged.

Online payments

Read more/less

Document creation

Action	Priority	Message
Online payment completed	Info	Payment received via {PAYMENT_GATEWAY_NAME}. Amount {PAYMENT_TOTAL_AMOUNT}.
Online donation completed	Info	Online donation received via {PAYMENT_GATEWAY_NAME}. Amount {PAYMENT_TOTAL_AMOUNT}
Online refund completed	Info	Refund automatically generated via {PAYMENT_GATEWAY_NAME}. Amount {REFUND_TOTAL_AMOUNT}.
Invoice created for online payment	Info	Invoice #{INVOICE_NUMBER} automatically generated for {ORIGIN_NAME}. Amount {INVOICE_TOTAL_AMOUNT}.

Settlement

Action	Priority	Message
Payment settled with invoice	Info	Payment {PAYMENT_TOTAL_AMOUNT} automatically settled with invoice #{INVOICE_NUMBER}.
Payment not settled with invoice	Warning	Warning: Unable to automatically settle payment with invoice #{INVOICE_NUMBER}
Refund settled with payment	Info	Refund {REFUND_TOTAL_AMOUNT} automatically settled with payment. Original payment amount {PAYMENT_TOTAL_AMOUNT}.
Online refund not settled due to correlated payment not found	Warning	Warning: Unable to find correlated payment for online refund from {PAYMENT_GATEWAY_NAME}. Refund amount {REFUND_TOTAL_AMOUNT}.
Refund settlement suppressed for partial refunds	Warning	Warning: Unable to automatically settle refund {REFUND_TOTAL_AMOUNT} with original payment from {PAYMENT_GATEWAY_NAME}. Please note that refund amount may include shipping or tax.
Refund not settled with payment	Warning	Warning: Unable to automatically settle refund {REFUND_TOTAL_AMOUNT} with payment.

Online gateway error

Action	Priority	Message
Online payment error	Error	Error: {PAYMENT_GATEWAY_NAME} - {ERROR_CODE}{GATEWAY_SPECIFIC_ERROR_MESSAGE}

Manual administration

Read more/less

Action	Priority	Message
Custom (manual) invoice manually created	Info	Invoice #{INVOICE_NUMBER} created manually by {CURRENT_USER_FULL_NAME}. Amount {INVOICE_TOTAL_AMOUNT}.
Generic invoice manually created	Info	Invoice #{INVOICE_NUMBER} generated manually for {ORIGIN_NAME} by {CURRENT_USER_FULL_NAME}. Amount {INVOICE_TOTAL_AMOUNT}.
Invoice deleted	Info	-
Invoice changed	Info	<Invoice #> edited by <admin name> <Amount>.
Payment manually created	Info	Payment recorded manually by {CURRENT_USER_FULL_NAME}. Amount {PAYMENT_TOTAL_AMOUNT}.
Payment deleted	Info	-
Payment changed	Info	Payment edited by <name> <amount>.
Donation manually created	Info	Donation created manually by {CURRENT_USER_FULL_NAME}. Amount {DONATION_TOTAL_AMOUNT}.
Donation deleted	Info	-
Donation changed	Info	Donation edited by <name><Amount>.
Refund created	Info	Refund created manually by {CURRENT_USER_FULL_NAME}. Amount {REFUND_TOTAL_AMOUNT}.
Refund deleted	Info	-
Refund changed	Info	Refund edited by <name>< Amount>

Recurring payments

Read more/less

Recurring profile created

Payment Gateway	Priority	Message
PayPal Standard	Info	PayPal Standard subscription (recurring payment) created. Subscription ID=<name>
PayPal Pro	Info	PayPal Pro recurring payments profile created. Profile ID=<name>
Authorize.NET	Info	Authorize.NET customer profile for recurring payments created. Profile ID=<name>

Recurring ended

Payment Gateway	Priority	Message

PayPal Standard	Info	PayPal Standard subscription (recurring payment) ended. Subscription ID=<name>
PayPal Pro	Info	PayPal Pro recurring payment ended. Profile ID=<name>

Recurring canceled

Payment Gateway	Action	Priority	Message
PayPal Standard	Cancel Notification received	Info	PayPal Standard subscription (recurring payment) was canceled. Subscription ID=<name>
PayPal Pro	Manually deleted on WA side by admin or member	Info	PayPal Pro recurring payments profile was manually deleted by <name>Profile ID=<name>
PayPal Pro	Deleted on PayPal side. Notification received	Info	PayPal Pro recurring payments profile was deleted. Profile ID=<name>
Authorize.Net	Manually deleted on WA side by admin or member	Info	Authorize.NET customer profile (for recurring payments) was manually deleted by <name>. Profile ID=<name>
Authorize.Net	Deleted due to maximum failed payment attempts reached	Warning	Authorize.NET customer profile (for recurring payments) was deleted because failed payment attempts limit was reached. Profile ID=<name>
Authorize.Net	Deleted by any other way	Info	Authorize.NET customer profile (for recurring payments) was deleted. Profile ID=<name>

Payments (refunds) for deleted entities

Read more/less

Action	Priority	Message
Payment received (application, renewal, upgrade, event registration) for deleted contact	Error	Error: Payment received for already deleted contact. .<Contact ID> <Payment>. <Amount>
Donation received for deleted contact (donor)	Error	Error: Donation received for already deleted contact. <Donor ID>. <Payment>. <Amount>
Refund recceived (application, renewal, upgrade, event registration, donation) for deleted contact	Error	Error: Refund received for already deleted contact. <Contact , Refund, Amount>
Donation payment for deleted donation, Payment for deleted event registration, Payment for deleted event	Error	Error: Unable to match received payment to existing transactions. <Contact, Payment, Amount>

Refund for deleted donation Refund for deleted event registration Refund for deleted event	Error	Error: Unable to match received refund to existing transactions. <Contact, Refund, Amount>

Override confirmed donations

Read more/less

Action	Priority	Message
Donation payment received but donation already manually confirmed by admin	Warning	Warning: Donation received via <Source, Amount> - but original donation record was already confirmed. Donation amount and tender were updated with newly received data.

On this page:

Expand all sections

Exporting to QuickBooks

Exporting to QuickBooks

You can use Wild Apricot to manage your accounts receivable, but to manage your general ledger or accounts payable, you'll need a dedicated accounting system. QuickBooks is a popular choice for small organizations, so Wild Apricot provides an export feature so you can transfer financial data – invoices, payments, refunds, and donations – and customer records from Wild Apricot to QuickBooks.

> Recording payments in Wild Apricot then exporting them to QuickBooks is more efficient than recording payments in QuickBooks since you would have to manually record them in Wild Apricot as well to maintain correct balances for your contacts.

When you export Wild Apricot data, you generate a QuickBooks IIF file, which can be imported into QuickBooks 2002 or later. (The IIF file cannot be imported into QuickBooks Online directly, but you might be able to find some third party tools that can help you doing this.)

Before you generate an export file, you must properly set up both QuickBooks and Wild Apricot. Then, you can filter the data you want to export, preview the transactions, and generate the export file.

Exporting to QuickBooks workflow

Below is a summary of the workflow involved in reconciling Wild Apricot transactions with QuickBooks.

In QuickBooks...

1. Set up your accounts.
2. Optionally, set up your classes.

In Wild Apricot's export settings for QuickBooks...

1. Control how the customer will be identified.
2. Specify the accounts to be updated.
3. Choose the classes to be used to classify transactions.

In Wild Apricot's Finances or Donations module...

1. Export your customer records.
2. Export your transactions.

In QuickBooks...

1. Import the customer records.
2. Import the transactions.
3. Apply payments to invoices.

As more transactions take place, you would repeat the process of exporting then importing new customer records and transactions, using date filters to avoid importing duplicate records.

This steps are described in detail below.

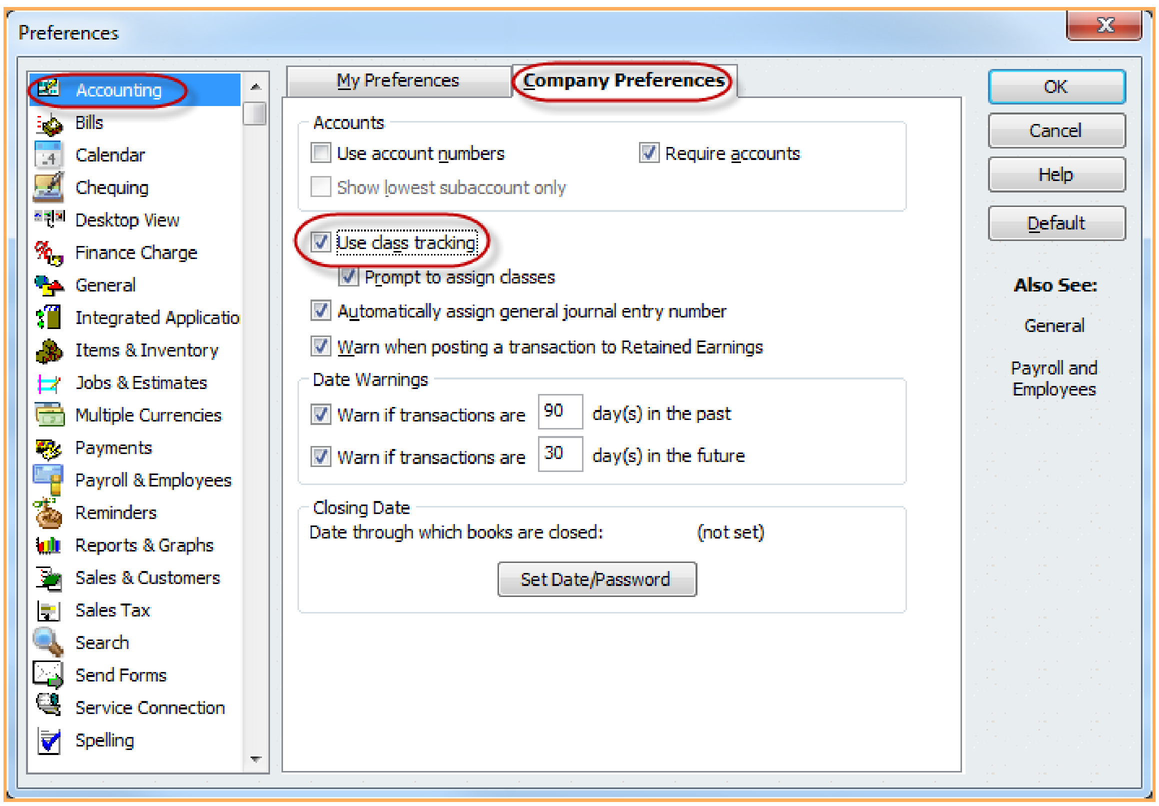
Setting up QuickBooks to receive Wild Apricot data

Before you import data from Wild Apricot into QuickBooks, you should create a backup of your current QuickBooks data. You might also consider importing your Wild Apricot data into a test QuickBooks company file to ensure that your import is producing the desired result before you import into an actual, live company data file.

As part of the export file, Wild Apricot uses QuickBooks *classes* to classify transactions. If you want to organize transactions by class, you must turn on class tracking in QuickBooks. To enable class tracking in QuickBooks, follow these steps:

Read more/less

1. In QuickBooks, click the **Edit** menu.
2. On the left side of the Preferences dialog, click **Accounting**.
3. Click the **Company Preferences** tab.
4. Check the **Use class tracking** checkbox.



You can enable class tracking before or after you import your Wild Apricot data.

You do not have to set up your classes in QuickBooks before importing from Wild Apricot – the appropriate classes will be automatically created as part of the import process. However, you should set up any accounts that you want to update with your Wild Apricot data; otherwise, the accounts will be automatically created in QuickBooks as a bank account.

If you do not already have your customers set up in QuickBooks, you should export customer records from Wild Apricot and import them into QuickBooks before importing transactions.

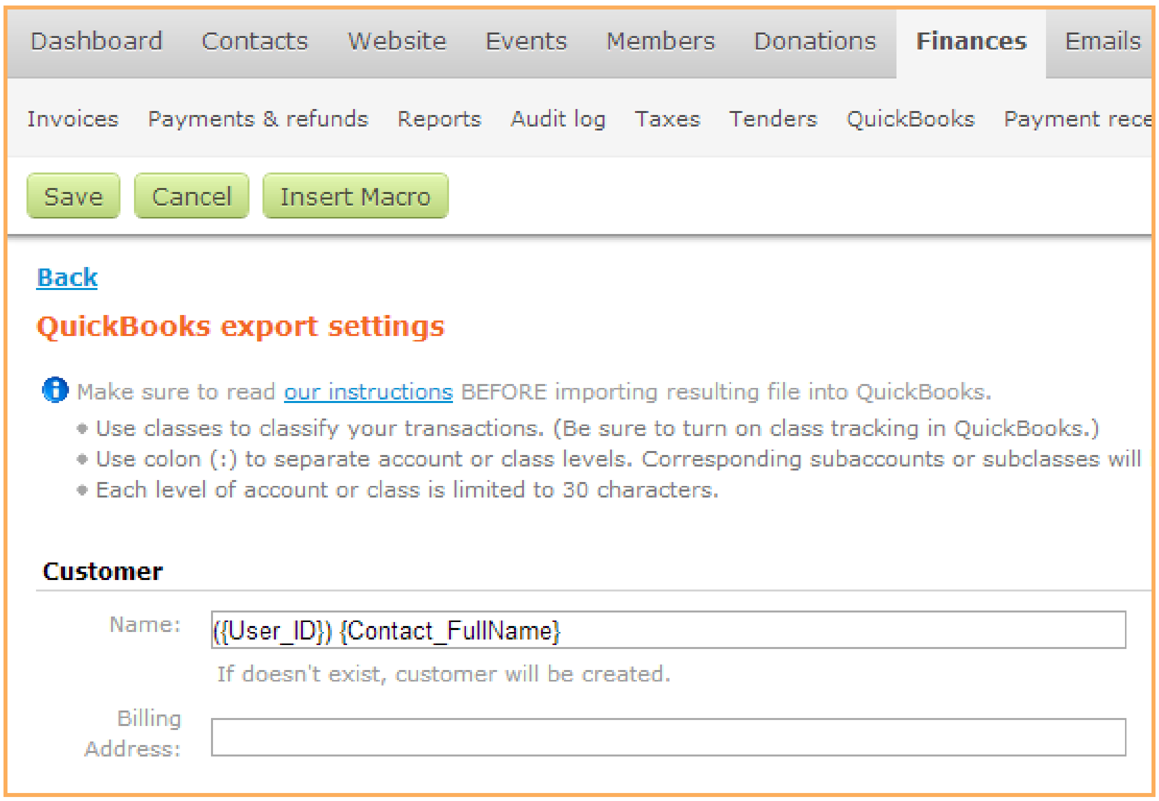
Setting up Wild Apricot to export to QuickBooks

From the **QuickBooks export settings** screen, you can control how customers are identified, choose the accounts to be updated, and specify the classes to be used to classify transactions in QuickBooks.

To display the **QuickBooks export settings** screen, hover over the **Finances** menu then select the **QuickBooks** option. From the **QuickBooks export settings** screen, click the **Edit** button to enter edit mode.

Customer settings

To control how customers are identified in QuickBooks, you enter one or more macros in the **Name** field under **Customer** .
Read more/less



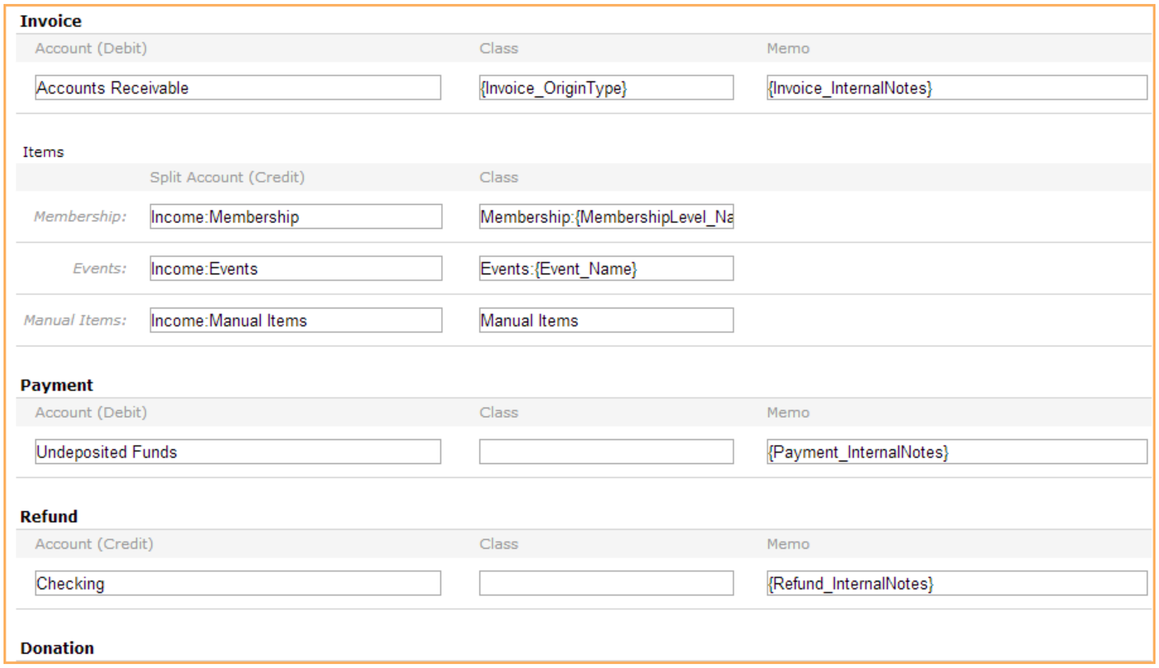
By default, the customer is identified using the {User_Id} and {Contact_FullName} macros. For a list of macros you can use in QuickBooks settings, see below.

Make sure you identify your customers the same way each time you export from Wild Apricot. Otherwise, you may create duplicate customer records when you import into QuickBooks.

You can also specify the customer's billing address by adding a macro that points to a custom contact field.

Specifying accounts and classes

For each type of transaction – invoice, payment, refund, and donation – you specify the account to be updated, and the class used to categorize the transaction.
Read more/less



For example, invoices can be classified by {Invoice_OriginType} – the source of the invoice as displayed in the **Origin** column on the **Invoices** screen in Wild Apricot. Individual invoice items are exported as descriptions.

If the classes being imported do not already exist in QuickBooks, they will be automatically created. Any accounts that do not already exist will be created as a new bank account.

You can provide for any notes to be exported along with the transaction by entering macros in the **Memo** fields.

Macros for export settings

The following is a list of macros that you can use in your export settings for QuickBooks.
Read more/less

Macro Name	Description
{ContactField_Organization}	The contact's organization.
{ContactField_First_Name}	The contact's first name.
{ContactField_Last_Name}	The contact's last name.
{Contact_FullName}	The contact's full name.
{User_ID}	The contact's unique identifying number.
{ContactField_Email}	The contact's email address.
{MembershipLevel_Name}	The name of the membership level.
{Membership_Fee_Type}	The membership fee type (e.g. New, Renewal, Change Level).
{Event_Name}	The name of the event.
{Event_Date}	The date of the event.
{Invoice_Number}	The invoice number.
{Invoice_Date}	The date of the invoice.
{Invoice_OriginType}	The origin of the invoice as identified on the *Invoices* screen (e.g. Membership, Events, Custom).

{Invoice_InternalNotes}	Any internal notes entered for the invoice.
{Invoice_PublicMemo}	Any comments to be displayed to the payer.
{Invoice_Status}	The status of the invoice.
{Payment_Date}	The date of the payment.
{Payment_Tender}	The tender used to classify the payment.
{Payment_InternalNotes}	Any internal notes entered for the payment.
{Refund_Tender}	The method by which the refund was issued.
{Refund_InternalNotes}	Any internal notes entered for the refund.
{Refund_PubilcMemo}	Any comments to be displayed to the payer.
{Donation_Number}	The donation number.
{Donation_Date}	The date of the donation.
{Donation_Comments}	Any internal notes entered for the donation.
{Donation_PublicMemo}	Any comments to be displayed to the payer.
{ContactField_customfieldname}	The value of a custom common field.
{MemberField_customfieldname}	The value of a custom membership field.

Exporting Wild Apricot data

After you have properly set up both QuickBooks and Wild Apricot, you can filter the data you want to export, preview the transactions, and generate the export file.

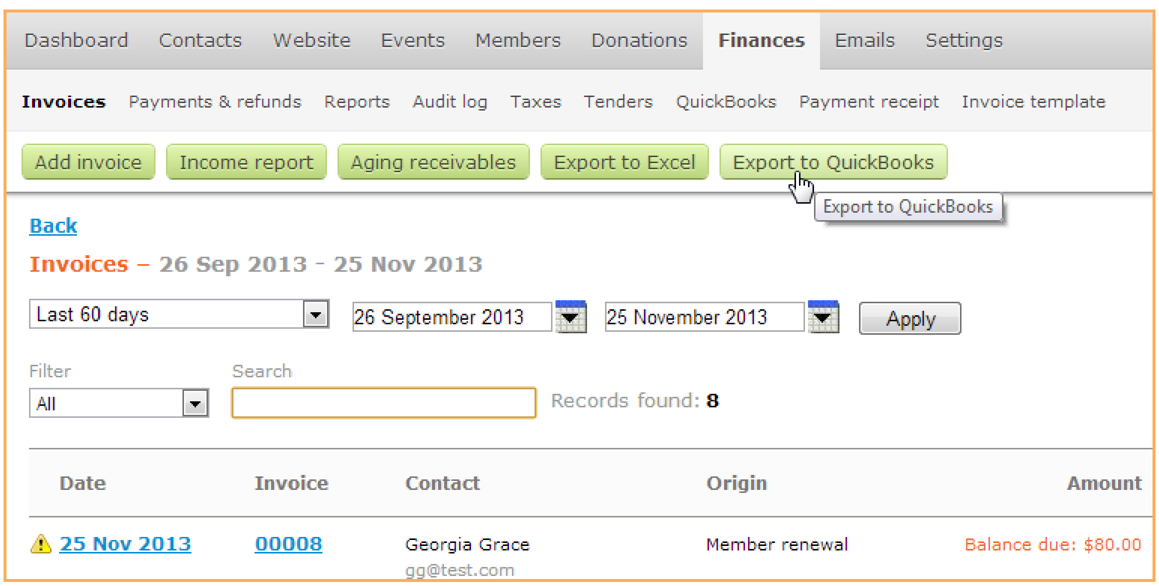
Filtering the data

The first step in the export process is to filter the data you want to export.

Read more/less

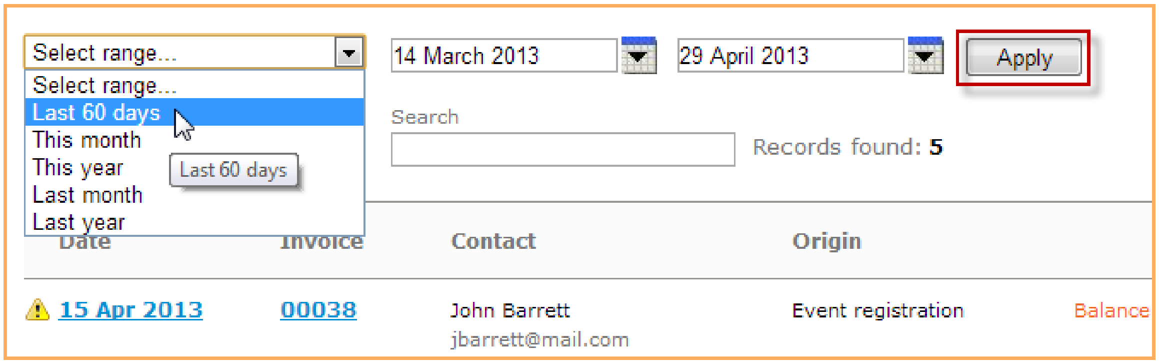
To export invoices or payments and refunds, hover over the **Finances** menu then select the **Invoices** option or the **Payments & refunds** option. To export donations, hover over the **Donations** menu and select the **Donations** option.

In each case, you can filter the data to be exported then click the **Export to QuickBooks** button, or click the button then filter the data from the next screen that appears.



Before clicking the **Export to QuickBooks** button, you can filter the data by date, by transaction type, or by entering a search keyword.

To filter the data by date, select a predefined date range from the **Select range** drop down, or enter the start and end dates of the range in the two date fields to the right. In either case, click the **Apply** button to apply the date filter.

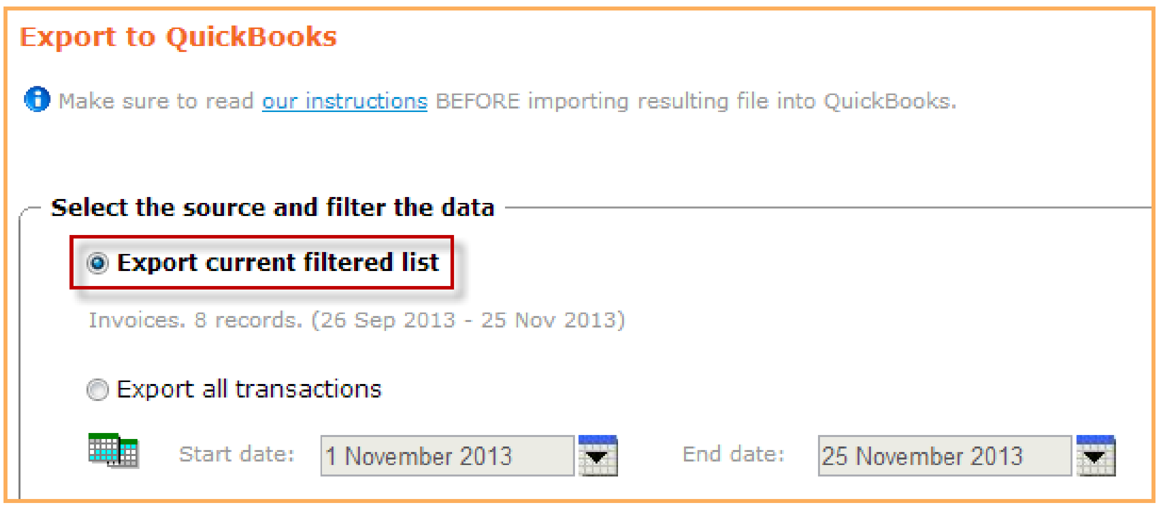


To filter the log by transaction type, click the **Filter** drop-down and select the type of transaction you want to view.

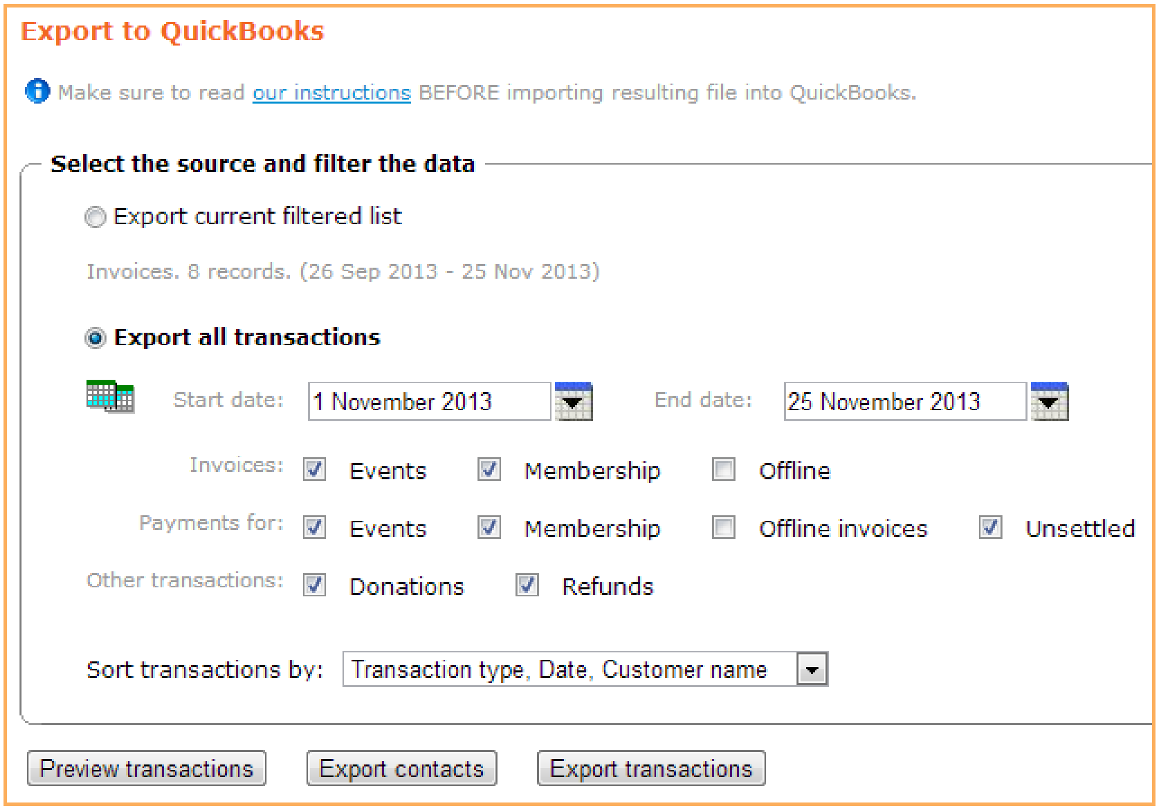
If you want to view transactions for a particular contact or set of contacts, you can enter a search string in the **Search** field.

After you click the **Export to QuickBooks** button, you can choose between exporting the currently displayed transactions, exporting all transactions, or choosing a different set of filter options.

If you want to export the currently displayed transactions, make sure the **Export current filtered list** radio button is selected.



If, instead, you click the **Export all transactions** radio button, you can export all invoices, payments, donations, refunds, regardless of which screen you are currently on. You can export the complete set of transactions or filter it by date or transaction type.

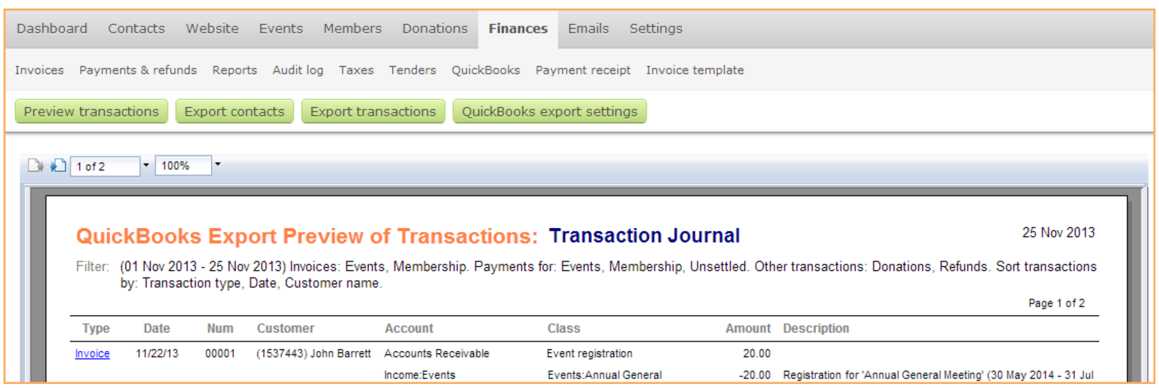


You can also sort the data by any combination of transaction type, date, and customer name.

Previewing transactions

To preview the transactions to be exported before generating the export file, click the **Preview transactions** button.

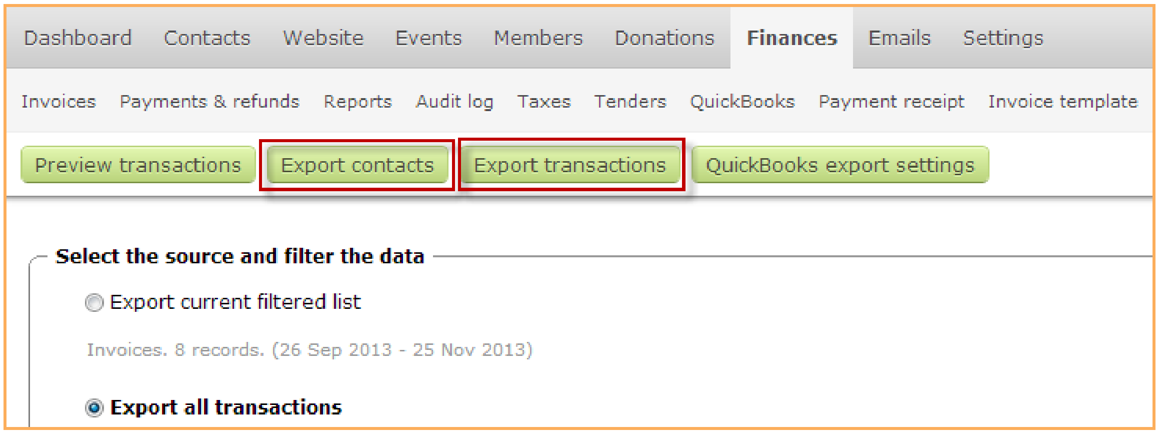
Read more/less



Generating the export file

When you are finished filtering and previewing the data, click the **Export transactions** button to export the currently displayed transactions or click the **Export customers** button to export the contact records associated with the transactions.

Read more/less



If you just export the transactions, customer records will be created in QuickBooks for each new contact associated with the imported transactions using the **Name** macro in your QuickBooks export settings, but the records will be empty apart from the **Customer Name** field.

Whether you choose to export transactions or customers, the data will be exported to an IIF (Intuit Interchange Format) file.

Importing into QuickBooks

You can import the generated IIF file into QuickBooks 2002 or later.

Read more/less

QuickBooks Online does not itself support IIF files, instead you have to look for 3rd party tools e.g. from Intuit and AaaTeX might help you accomplish this (See also How to import Journal Entries using IIF files into QuickBooks Online using Transaction Pro Importer.) Note however we cannot guarantee these 3rd party tools are compatible with the Wild Apricot IIF file.

> Before importing into QuickBooks, you should back up your QuickBooks data, since the import cannot be undone.

To import an IIF file into QuickBooks 2002 or later, you must be logged in as the QuickBooks Administrator, and in single-user mode – to prevent other users from accessing data as it is being imported. If you have not created users and roles in your company file, you are logged in as the Admin user by default.

> QuickBooks has certain limits on the maximum number of records for list items and transactions. For more information, see http://support.quickbooks.intuit.com/support/Articles/INF12412.

To import an IIF file into QuickBooks 2002 and later, follow these steps:

1. In QuickBooks, click the **File** menu.
2. Click the **Utilities** option.
3. Click the **Import** option.

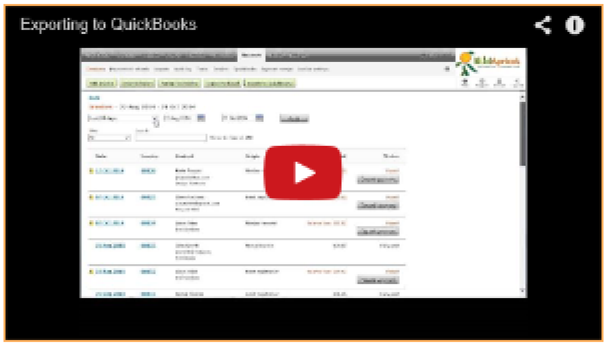
   > In earlier versions of QuickBooks, the **Import** option appears directly within the **File** menu.

4. Click the **IIF Files** option.
5. Select the IIF file to be imported.
6. Click the **Open** button.

Your transactions will now be imported, and assigned to accounts and classes according to your Wild Apricot export settings. Any accounts that do not already exist will be created as a new bank account. Any classes that do not already exist in QuickBooks will be automatically created. Individual invoice items will be added to your items list.

> Because of limitations with the IIF file format, links between invoices and payments will not be maintained. To restore them, you must open each imported payment in the Receive Payments window and apply it to the appropriate invoice. This will mark the invoice as paid. If you do not assign a payment to an invoice and mark the invoice as paid, it will not show up in any reports.

For more help with the import process, please visit the Intuit QuickBooks Community site in the Importing and Exporting Data forum.



Video: Exporting to Quickbooks (7:07)

On this page:

Expand all sections

See also:

- Exporting members and other contacts
- Bulk changes using import and export

Events

Events

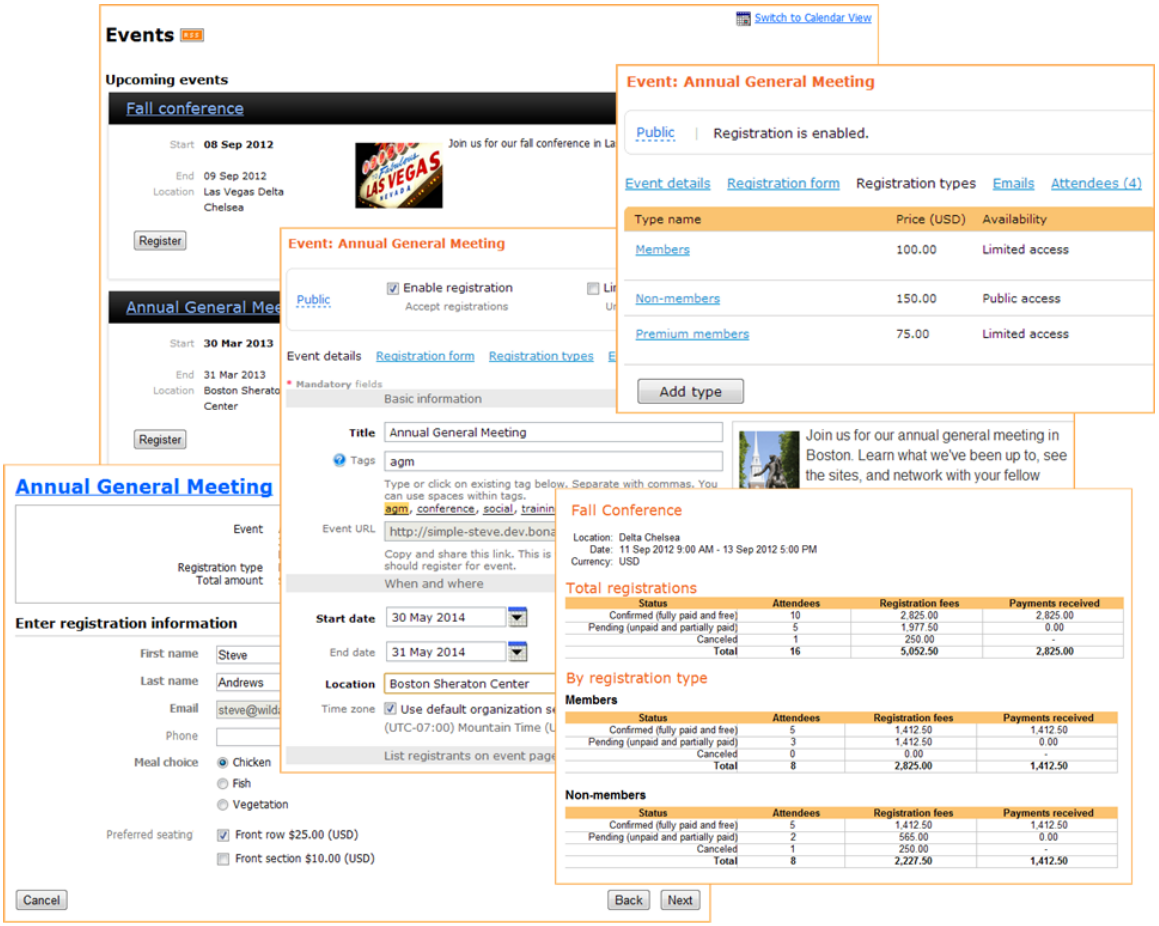
With Wild Apricot's events module, you can set up any number of events and publish them in an events calendar on your Wild Apricot site (or another website). From the events calendar, visitors can view event details, sign up for events, register guests, and pay registration fees online.

You can organize various types of events, including:

- conventions, conferences, and seminars
- board meetings
- training sessions and webinars
- social events

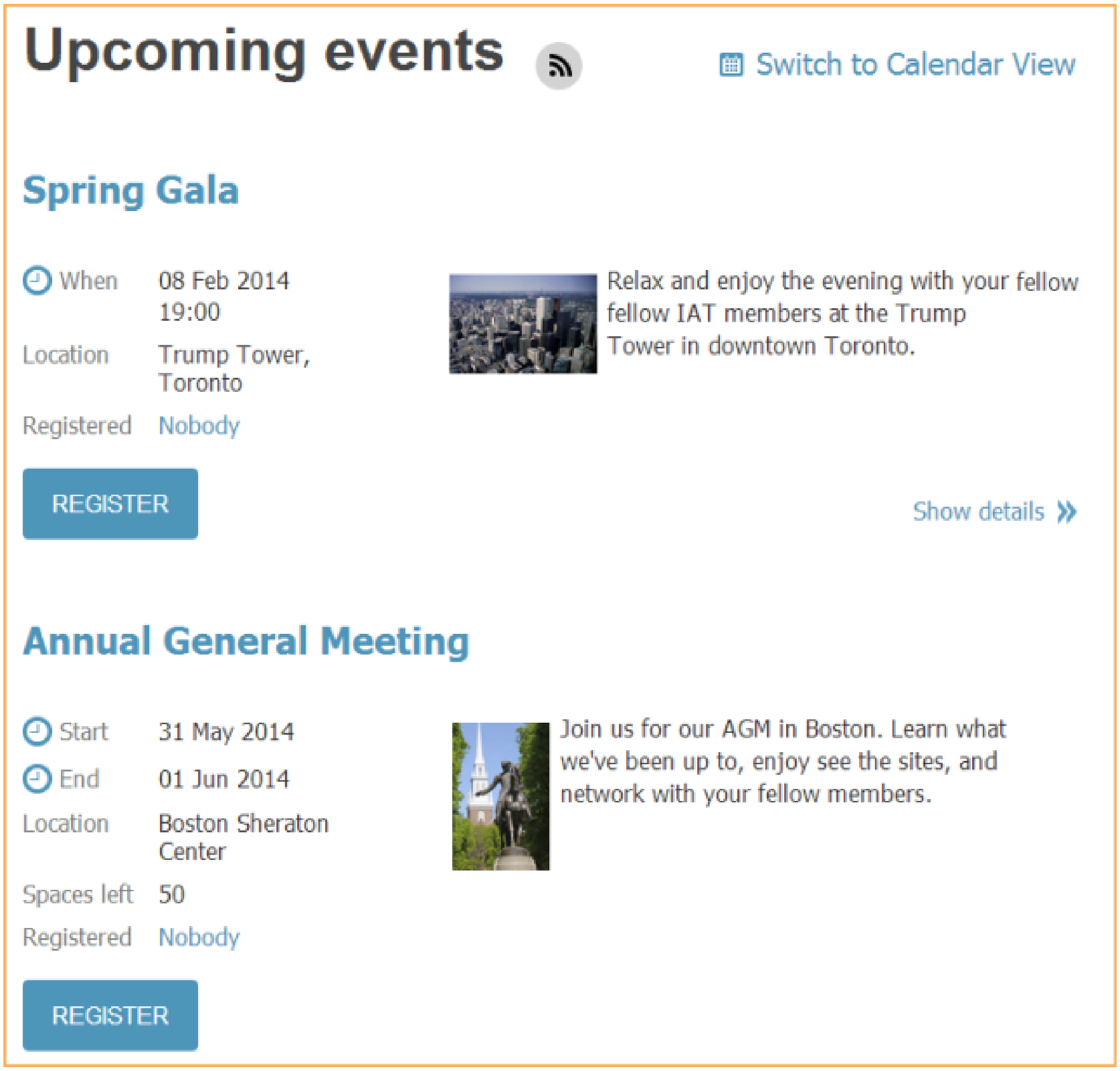
Wild Apricot allows you to customize the events calendar, the event registration form, and the event emails (announcements and reminders). You can use the registration form to collect information about attendees (like meal preferences and breakout session choices) and to provide additional event options (like golf or concert tickets) available at a separate cost.

You can restrict each event to selected membership levels, and set up multiple ticket types – aka registration types – so you can charge different prices for different event packages or for different kinds of attendees.



Adding an event calendar page

So that visitors to your site can see your events and register for them, you can add an event calendar to a page on your website – and make the page accessible to non-administrators.



Event calendars – like other site content – are inserted as gadgets, in this case, an event calendar gadget.

After you add an event calendar gadget to a page, you can adjust the event calendar gadget settings, to control how events are displayed and filter the calendar using event tags. You can also restrict access to the page on which the event calendar appears by membership levels , members groups , or administrators only.

Whether an event appears on an event calendar can also depend on its visibility – which you can restrict by membership level , member groups , or limit to administrators only

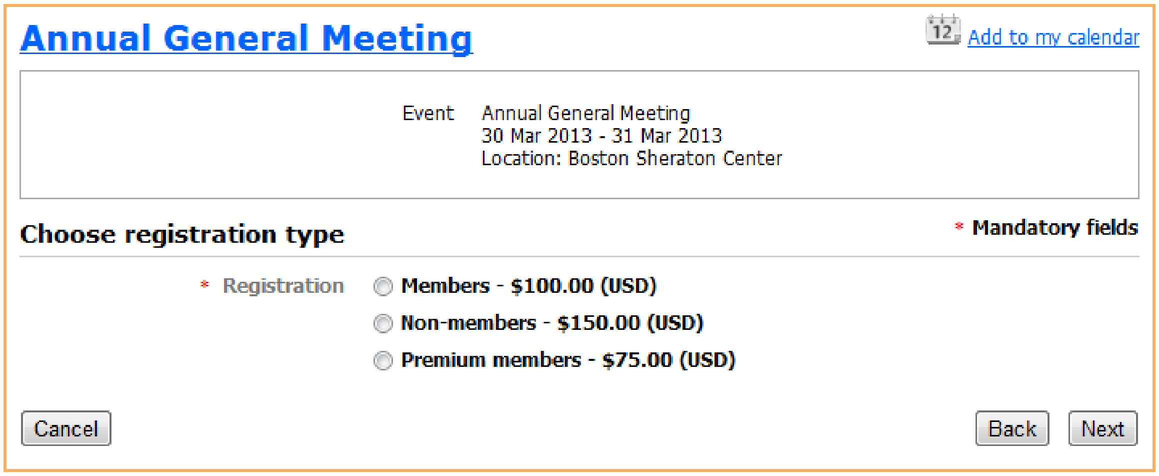
You can set up multiple event calendars, each displaying a different set of events (e.g. training vs. social events).

You can also add an upcoming event gadget to a page on your site, and insert or email links to specific events.

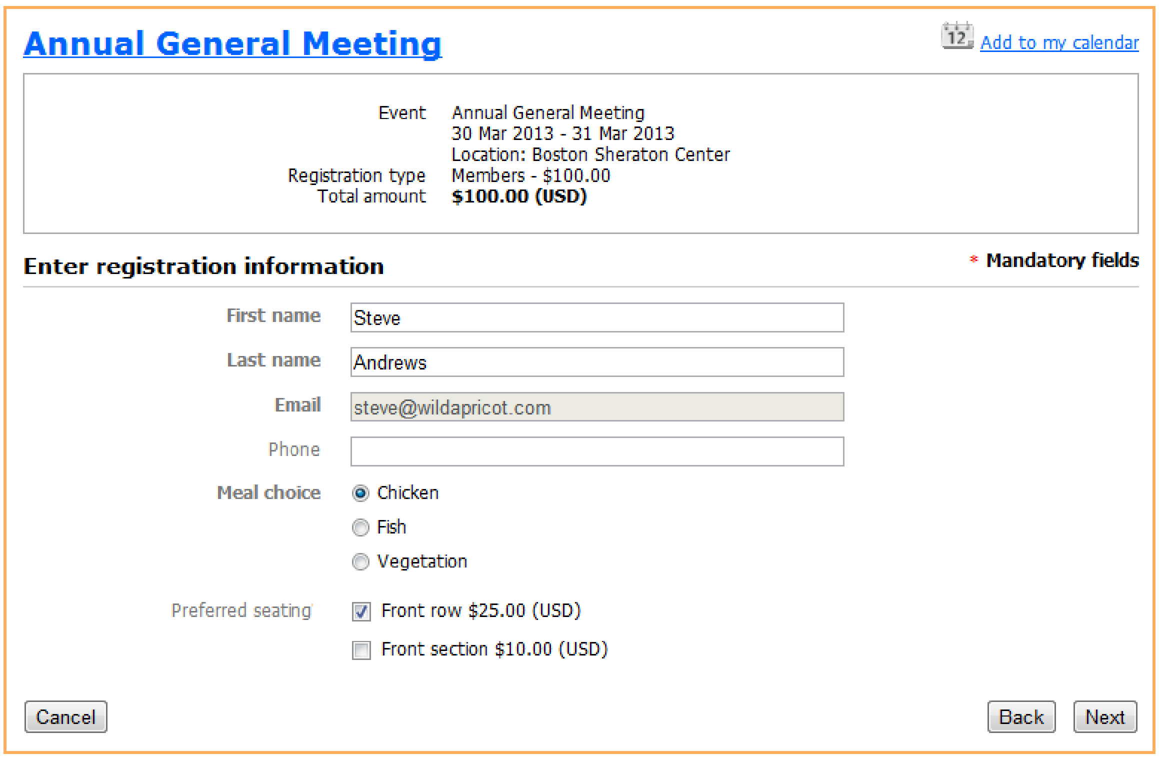
Registering for an event

Once an event is set up and online registration is enabled, it will appear on your event calendar – where your visitors to your site can view details and register for the event.

When registering for an event, visitors may be asked to choose a registration type. Depending on whether they are logged on or not, some member-only registration types may not be available.



After selecting a registration type, registrants fill out the registration form, and select additional event options, if any (e.g. meal preference, event sessions). If the event is set up with a guest registration option, the registrant will be able to record guest registrations.



What happens next depends on how the event was set up.

- If only offline payment was enabled, then the registrant will have the option of cancelling or confirming the registration. If the registrant clicks the **Confirm** button, an invoice will be emailed to them – unless invoice emails have been disabled from the Invoice and receipt settings – and a registration summary will be displayed. From the registration summary, the registrant can choose to view or pay the outstanding invoice.
- If only online payment is enabled, then a **Pay online** button will appear. Clicking the **Pay online** button will take the registrant to the online payment screen for your site's payment provider.
- If both online and offline payment is enabled, then two buttons will be displayed: **Pay online** and **Invoice me**. Clicking the **Pay online** button will take the registrant to the online payment screen for your payment provider. Clicking the **Invoice me** button will result in the registrant being emailed an invoice – which they can pay online or offline – and a registration summary being displayed. From the registration summary, the registrant can choose to view or pay (online) the outstanding invoice.

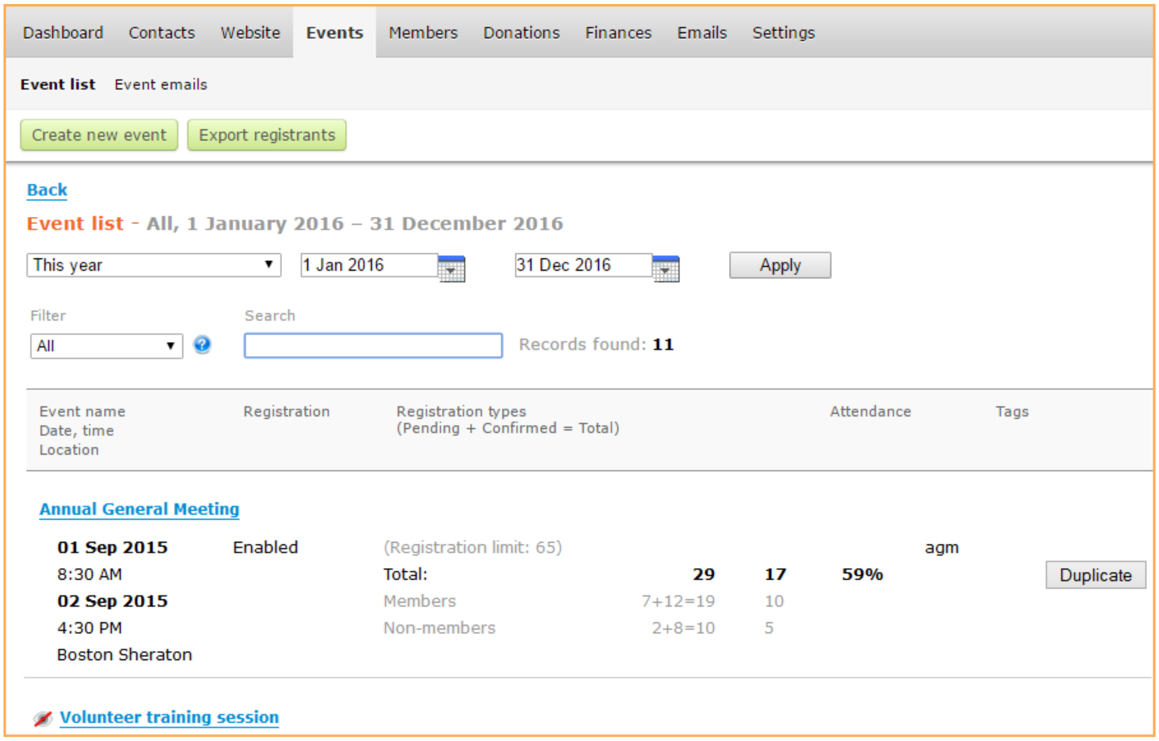
When paying using PayPal Payments Pro, the **Pay online** button with be replaced with two buttons: **Pay with credit card**, and **Pay Pal Express checkout**.

New registrants are automatically added to the registrants list – and the contact database, if they're not already there. Whether guests are automatically added to your contact database depends on the **Guest registration** setting that appears within the event details for each event.

Wild Apricot will automatically generate an invoice and payment record for each attendee, and send event registration confirmations and payment receipts, as well as notifications to site administrators and event administrators.

Setting up an event

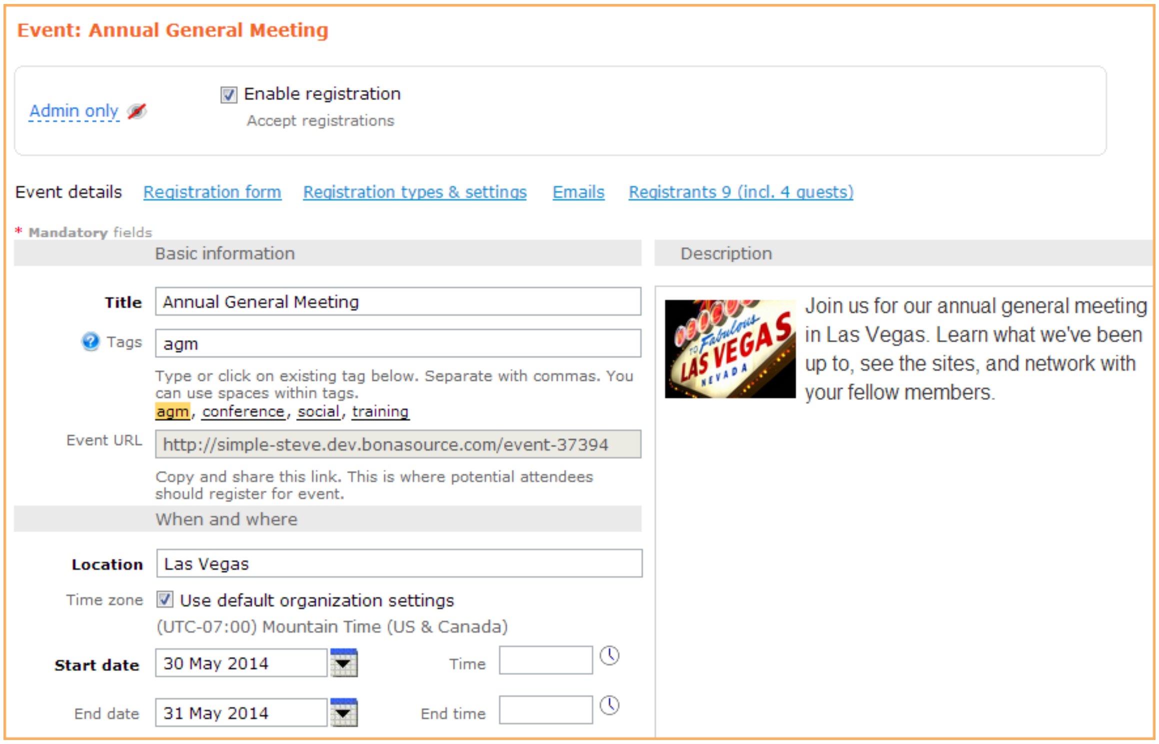
With an event calendar added to your site, you can starting setting up events. You create and manage your Wild Apricot events from the **Eve nts** module.



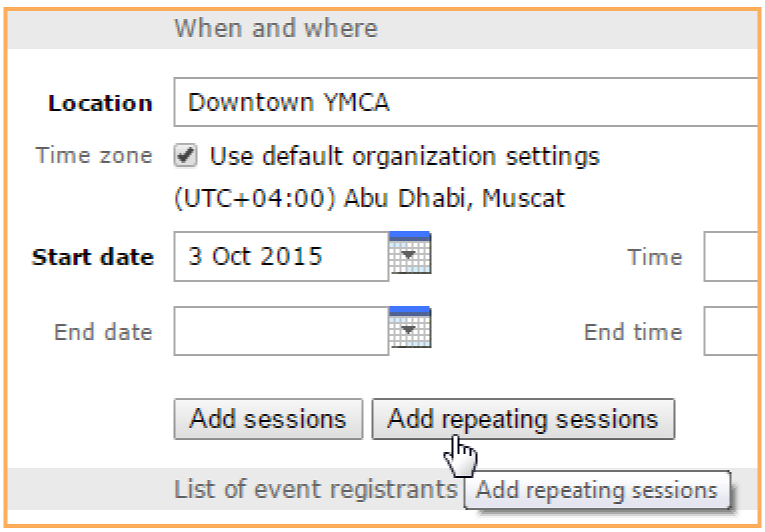
You can manage an existing event by clicking on it within the list. To add a new event, you click the **Create new event** button. To duplicate an existing event, you click the **Duplicate** button beside the event within the list. If you copy an event, the new event will inherit its settings from the existing event but access will be set to admin only. If you create an event from scratch, it will initially be set to admin only access with registration disabled.

Providing event details

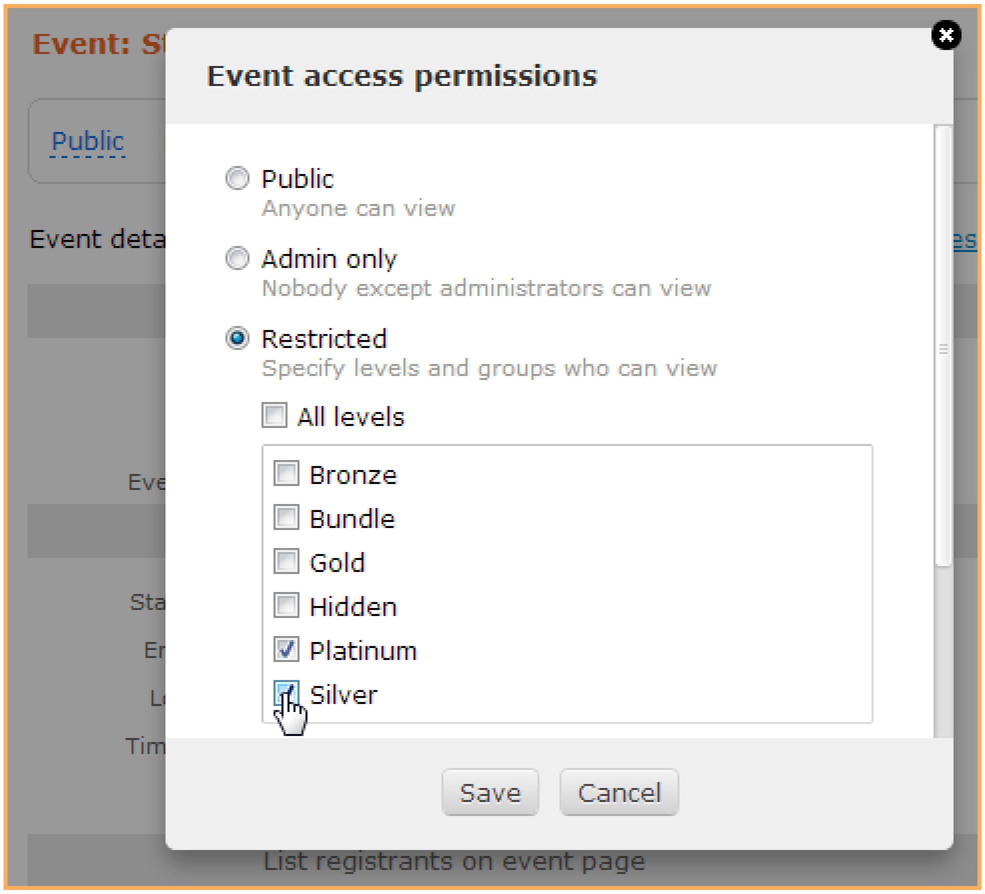
After you've created or copied the event, the **Event details** screen appears. From here, you specify the event name, location, date, and cost, and control the kinds of visitors that can see and register for the event. You can also control whether guests are automatically added to your contact database.



For events that consist of multiple sessions, you can add individual sessions manually and/or specify the schedule of regularly recurring sessions.



You can restrict the visibility of the event by membership level, member groups, or limit access to administrators only.



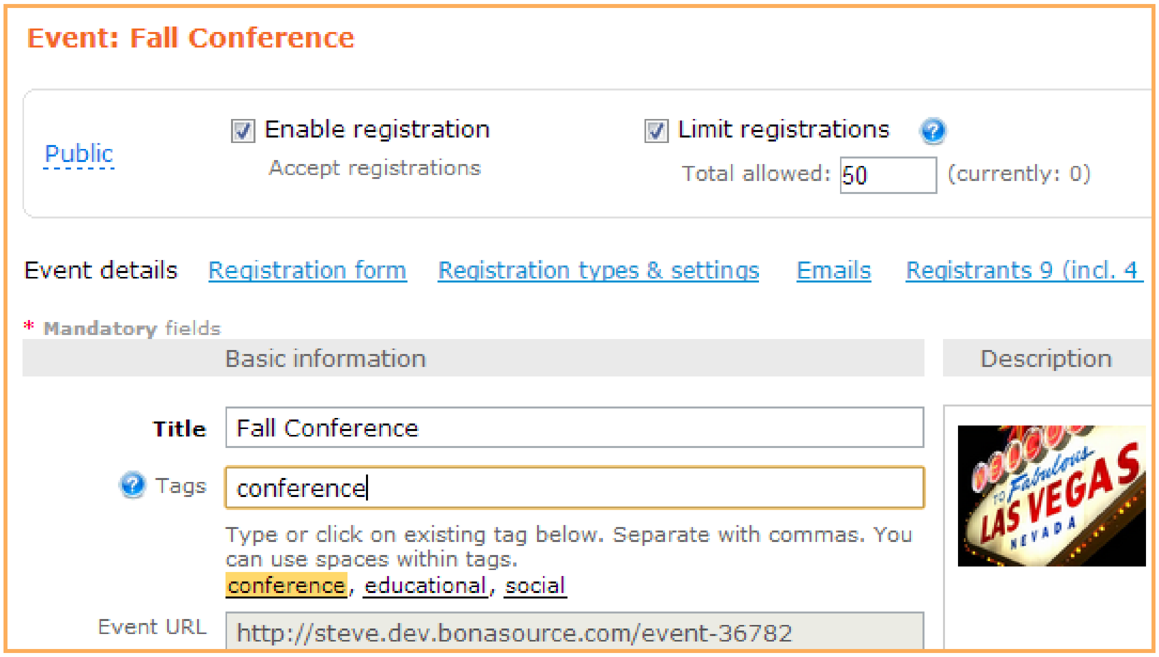
Restricted events will only appear on an event calendar for members whose membership level or member group has been granted access.

If you want to offer a preview of an upcoming event, you can make the event accessible without enabling registration.

Categorizing events

Tags can be used to categorize events so you can display different kinds of events on separate event calendars. For example, you could set up one calendar for educational events and another for social events.

You can assign an unlimited number of tags to each event and use those tags to limit the kinds of events appearing on your event calendar page.

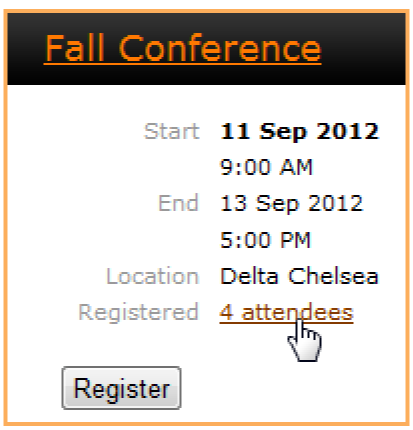


Publicizing the attendees list

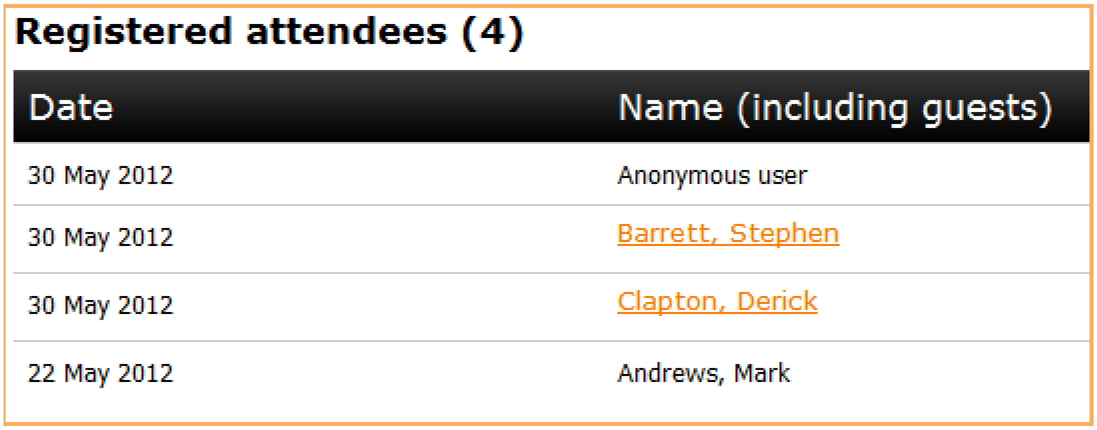
For each event, you can choose whether to publish a list of registrants. Doing so may encourage others to register or promote networking.

To publish a list of registrants, check the **Show registrants who want to be listed** option within your event settings. You can control whether the attendees list is visible to all visitors or just members, and whether the list includes pending registrations (for which payment has not yet been received).

If you enable this option, a **Registered** link will appear for the event on the event calendar and on the event details.



Clicking the link will display the name of each registrant and the date of registration. If the registrant is a member, their name will be linked to their profile.



Registered attendees (4)

Date	Name (including guests)
30 May 2012	Anonymous user
30 May 2012	Barrett, Stephen
30 May 2012	Clapton, Derick
22 May 2012	Andrews, Mark

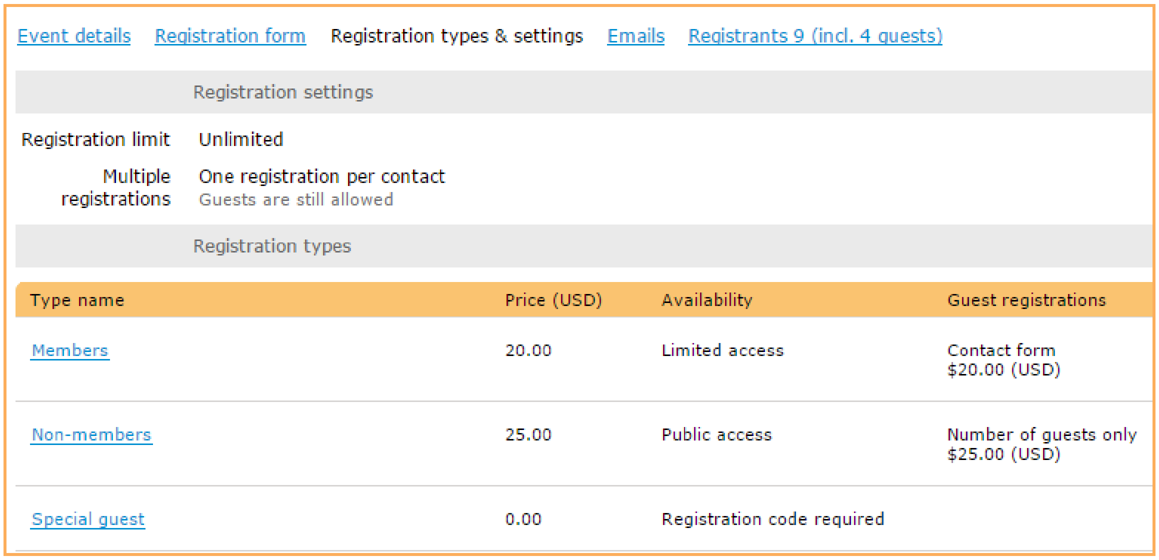
The registrant will be listed as **Anonymous user** if the registrant has unchecked **Include name in list of event registrants** on the registration form, or if a member has agreed to be added to the list but does not share his information with the public (see Member privacy settings).

Customizing the registration form

You can customize the main registration form by excluding common fields from your contact database, and adding custom event fields. For example, you can add an event field for meal selection, and another to offer preferred seating. Depending on how you set up the field, an additional cost can be added at checkout.

Setting up ticket types

For each event, you can set up different ticket types aka registration types. Setting up registration types allows you to charge different prices for different event packages or for different kinds of attendees. For example, you might want to charge more for non-members, or less for premium members.



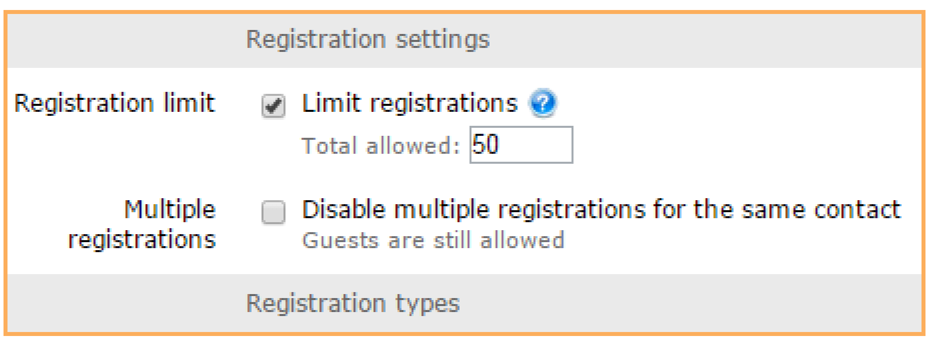
You can cap the number of registrations for each registration type – offering, for example, a limited number of discount student registrations, or offer early-bird discounts by making a registration type only available within a certain date range.

You can enable guest registrations so that registrants can register other people at the same time as they submit their own registration. You can choose to collect contact information for each guest or just ask for the total number of guests. You can also choose whether to charge a special guest price for the event or just use the base price.

You have to set up at least one registration type before you can enable an event for registration.

Capping registrations

If you have events with limited space, you can choose to cap your event to a specific number of registrations. You can limit the number of registrations for the entire event, or for specific registration types.



When the registration number is reached, event registration will be automatically disabled (though administrators can still register attendees beyond the registration limit).

Once you set a registration limit for an event or registration type, you can enable an event waitlist .

Controlling multiple registrations

Y ou can also control whether visitors can register multiple times for the same event. You can enable multiple registrations either for the entire event or for individual registration types. Whether multiple registrations are disabled or not, an administrator can still set up multiple registrations for a contact, but will be warned about the existing registration.

Setting up event emails

For each event, you can set up and schedule multiple email announcements and event reminders, as well as registration messages. You can customize the emails for each event, and/or modify the email templates used as the basis for future events. You can include a **Not attending** button in your announcements so that invitees can let you know if they are definitely not going to register.

For more information, see Event emails .

Designating an event organizer

For each event, you can designate an event organizer who will receive all event-related administrative emails, as well as a copy of event announcements and reminders. If you want to monitor individual registrations, you can provide for the event organizer to also receive event registration notifications. By default, the event organizer is the designated contact for your organization (see Organization details).

Enabling registration

Before you can enable registration, you must save the event and set up at least one registration type. You can only save an event after entering the event title and start date.

To enable registration after saving the event and setting up at least one registration type, follow these steps:

1. Click the event within the events list (if you're not already busy setting up the event)
2. Click the **Edit** button (if you're not already in edit mode).
3. Check the **Enable registration checkbox**.
4. Click the **Save** button to save your changes.

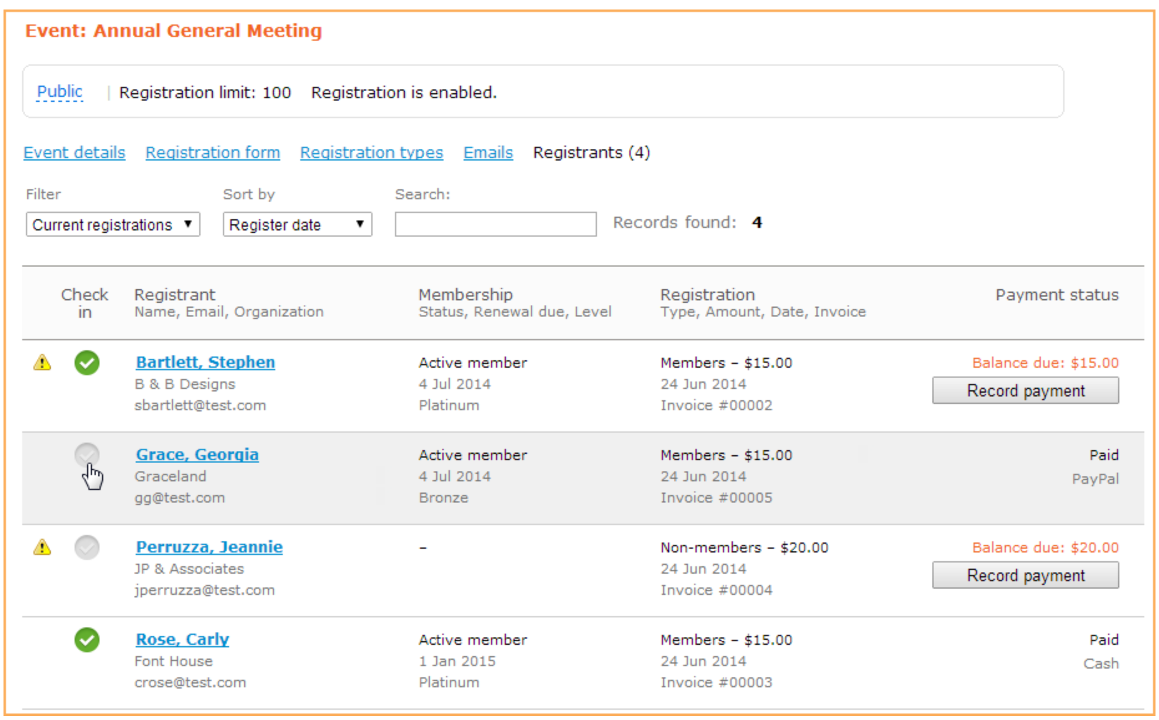
Promoting your event

There are a number of ways you can promote your Wild Apricot event:

- Set up automatic announcements to be sent to people in your Wild Apricot database. You can schedule event announcements and reminders to be automatically delivered a certain number of days before the event.
- Send automatic reminders to people who have already registered.
- Send out email blasts with event information and a link to event details.
- Promote your event on social media (e.g., Facebook, Twitter) and provide a link to your event details.

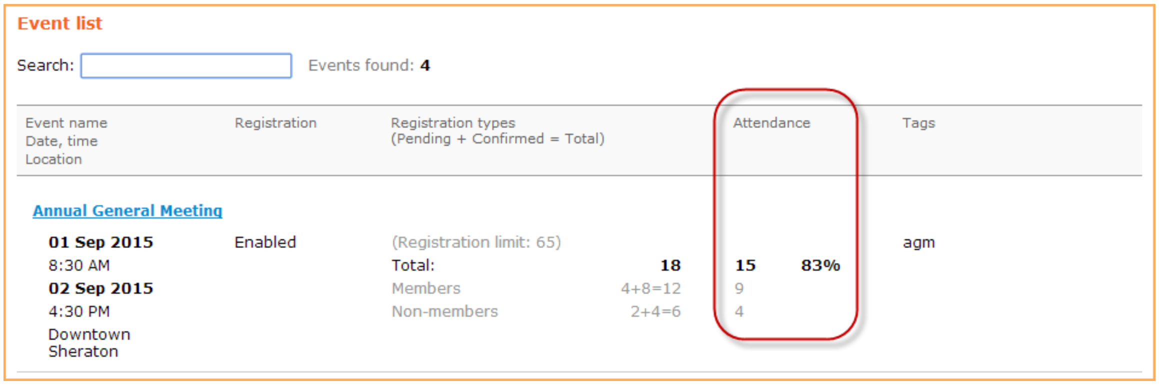
Tracking attendance

You can check in registrants to record their attendance, either from the browser version of Wild Apricot, or using Wild Apricot's mobile app.



If you don't have a computer at the event, you can generate and print an attendance report that you can use to manually record attendance. You can then use the completed attendance report as a reference while recording attendance in Wild Apricot.

After you've recorded the attendance for an event, you can view the number and percentage of attendees from the events list.

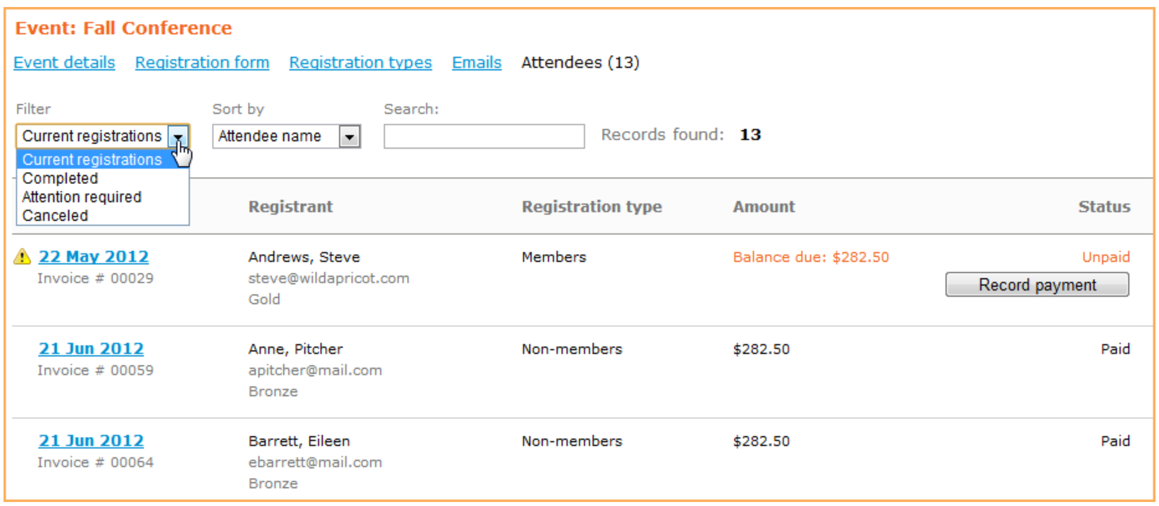


Managing events

As an administrator, you can always check how registration for your event is proceeding. For each event, you can view:

- a list of registrants for the event
- details of individual registrations
- summary of event payments
- summary of event choices

You can filter the attendee list by registration status, and sort it by registration date, attendee name, or registration type.



The event payments report lists the number of attendees, the amount collected, and the amount owing, broken down by registration type.

Fall Conference

Location: Delta Chelsea
Date: 11 Sep 2012 9:00 AM - 13 Sep 2012 5:00 PM
Currency: USD

Total registrations

Status	Attendees	Registration fees	Payments received
Confirmed (fully paid and free)	10	2,825.00	2,825.00
Pending (unpaid and partially paid)	5	1,977.50	0.00
Canceled	1	250.00	-
Total	**16**	**5,052.50**	**2,825.00**

By registration type

Members

Status	Attendees	Registration fees	Payments received
Confirmed (fully paid and free)	5	1,412.50	1,412.50
Pending (unpaid and partially paid)	3	1,412.50	0.00
Canceled	0	0.00	-
Total	**8**	**2,825.00**	**1,412.50**

Non-members

Status	Attendees	Registration fees	Payments received
Confirmed (fully paid and free)	5	1,412.50	1,412.50
Pending (unpaid and partially paid)	2	565.00	0.00
Canceled	1	250.00	-
Total	**8**	**2,227.50**	**1,412.50**

If your event registration form includes options such as meal choices or special seating, the registration fields report summarizes the choices made by event registrants.

Event registration fields report

Annual General Meeting
01 Sep 2015 at Downtown Sheraton

Fields and options	Selected	Participant details				
Food choice		Event attendee	Organization	Email	Status	Checked in
Chicken	6	Bartlett, Stephen	B & B Designs	sbartlett@test.com	confirmed	Yes
		Dixon, Jackie	Dixon Designs	jdixon@test.com	pending	No
		Grace, Georgia	Graceland	gg@test.com	confirmed	No
		Hynde, Christine	Typeline	chynde@test.com	pending	No
		Rose, Carly	Font House	crose@test.com	confirmed	No
		Sandino, Augusto	Design Partners	sandino@test.com	pending	No
Halal	1	Ashwal, Amria	Design Planet	aashwal@test.com	pending	No
Vegetarian	2	Mann, Terence	Mann Oh Mann	tmann@test.com	pending	No
		Perruzza, Jeannie	JP & Associates	jperruzza@test.com	confirmed	Yes
No entry	1					

When your event is set up with a payment option, Wild Apricot will automatically generate an invoice and payment record for each attendee.

Setting up and managing events (13:39)

On this page:

See also:

- Events list
- Setting up events
- Event emails
- Providing a Not attending option
- Publishing your event calendar
- Adding an event to calendar programs
- Self-service online event registration process
- Registering and paying for another contact
- Adding event registrants manually
- Guest event registration
- Viewing event registration information
- Searching for contacts with event registrations
- Tracking event attendance
- Cancelling events and registrations

Events list

Events list

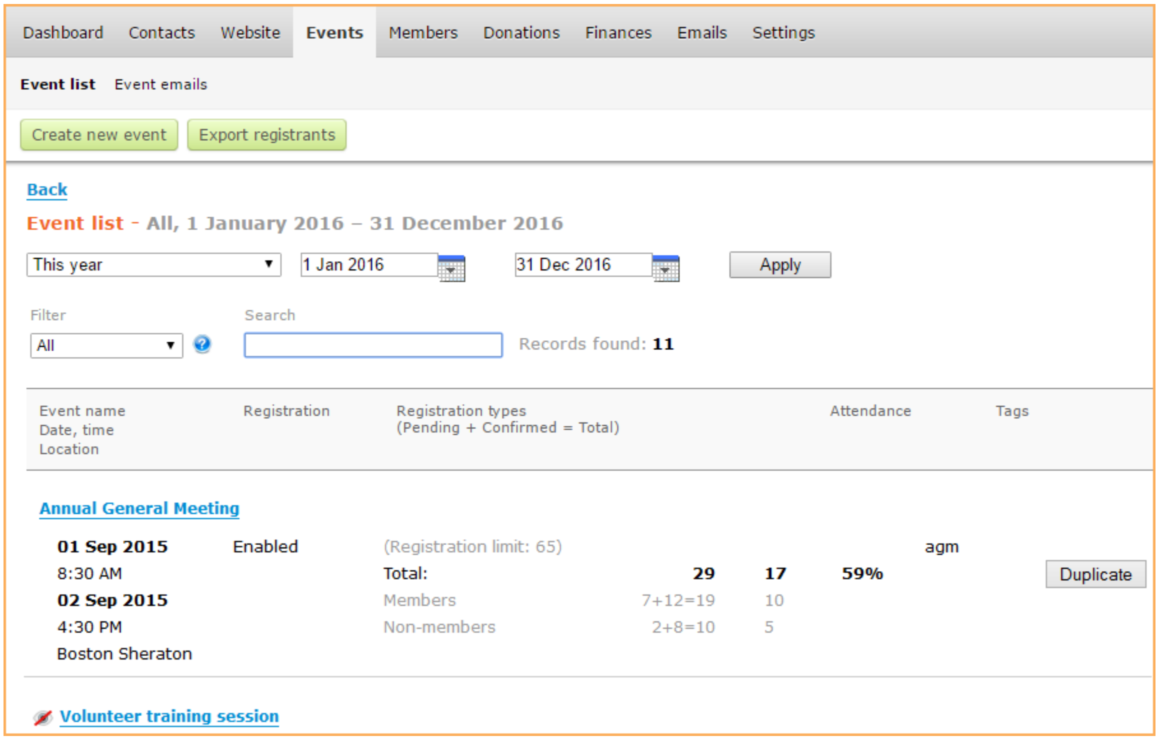
The events list displays the events you have set up for your site. Wild Apricot allows you to create an unlimited number of events. You can have multiple events open for registration at the same time.

So that visitors to your site can see your events and register for them, you can add an event calendar gadget to your website – and make the page accessible to non-administrators. You can set up multiple event calendar pages, each displaying a different set of events (e.g. training vs. social events). For more information, see Publishing your event calendar.

Managing events

To create and manage events for your site, hover over the **Events** menu and select the **Event list** option. The event list that appears displays a filtered list of your events.

Read more/less



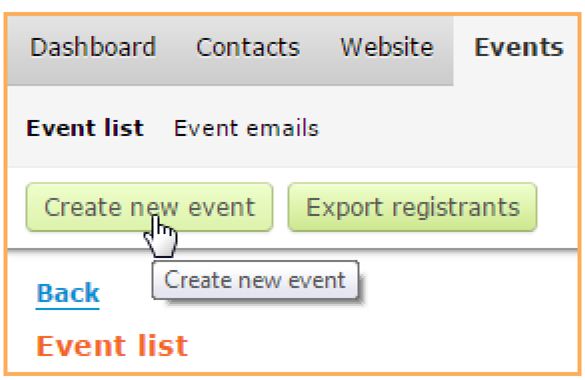
By default, only your upcoming events are listed, except those whose access is set to admin only. You can change which events are displayed by selecting a different option from the **Filter** drop-down. You can further filter the list by selecting a date filter, and by entering a search string in the **Search** field. For more information, see Filtering the event list (below).

For each event, the title, date and time, location, registration status, registration types (with total registrations for each type), and tags are shown. The registrations are divided into confirmed and pending (payment not yet received) registrations.

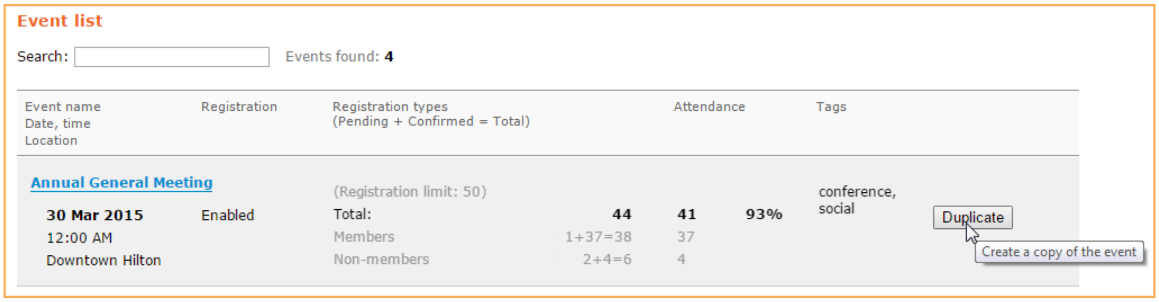
Adding an event

To add a new event, click the **Create new event** button from the events list.

Read more/less



You can create a copy of an existing event by clicking the **Duplicate** button beside the event within the events list.



The new duplicate event will be saved as an admin-only event but will not be opened, allowing you to continue to make more copies of the event. The word **(copy)** will be appended to the name of the duplicate event to distinguish it from the original one. All event settings will be duplicated, other than event access permissions, multiple sessions, and the list of registrants.

You can also duplicate an event from its event details.

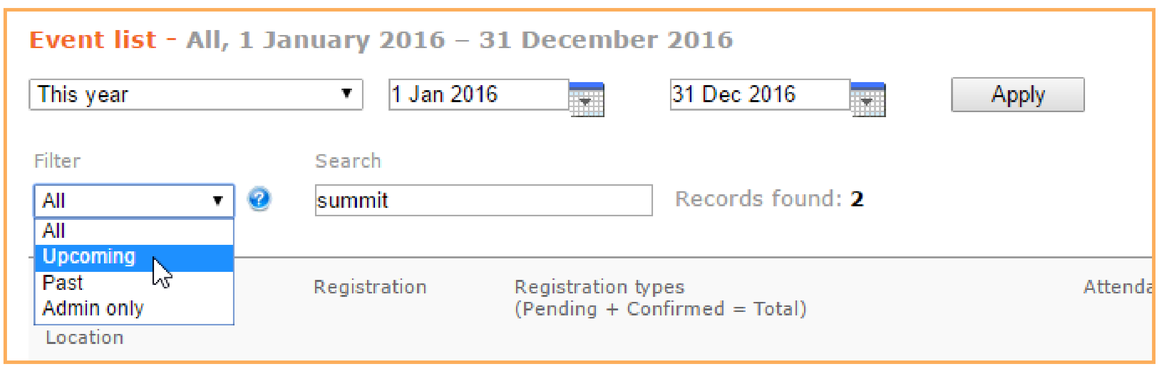
For more information, see Setting up events.

Filtering the event list

You can filter the event list in a number of different ways. You can:

- Select or specify a date filter
- Selecting a filter from the **Filter** drop-down
- Type text to be matched in the **Search** field

Read more/less



After selecting or entering a date range, click the **Apply** button to apply the range.

The **Filter** drop-down includes the following options:

Option	Description	Sorting
All	All events, regardless of date or visibility	From furthest in the future to furthest in the past
Upcoming	All upcoming events, except those set to admin only	From soonest to furthest away
Past	All past events, regardless of visibility	From most recent to furthest in the past
Admin only	Upcoming admin-only events	From soonest to furthest away

A multi-session event will be included in past events only when all its sessions have taken place. If any of the sessions are in the future, then the event will be included in the list of upcoming events.

Using the **Search** field, you can filter using any of the displayed event information, including event name, location, registration status, and tags.

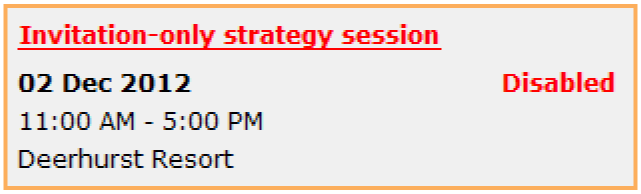
The three different filter options – the date filter, the **Filter** drop-down, and the **Search** field – can be combined to further narrow your event list. For example, if you select the **Upcoming** filter with a date range already selected, then only those upcoming events that take place within the specified date range will be listed.

Flagging different event types

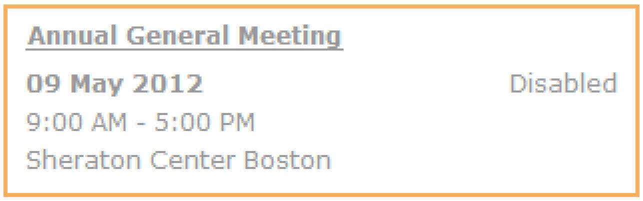
Different colors are used to flag different event types.

Read more/less

Events for which registration has been disabled are displayed in red.



Past events are grayed out but can still be modified (though no more registrations can be accepted).



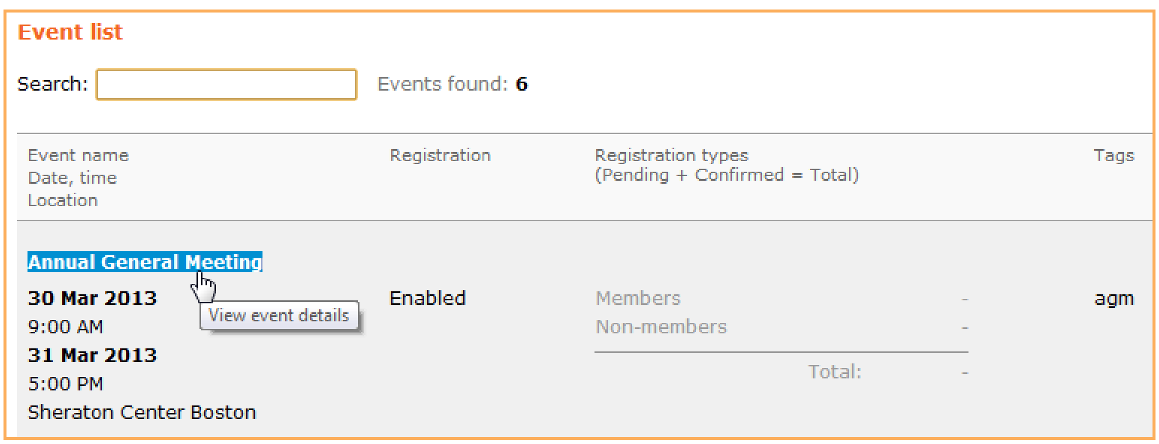
The following icons are used to flag different kinds of events within the events list.

Icon	Meaning
	Restricted event
	Admin-only event
	Multi-session event

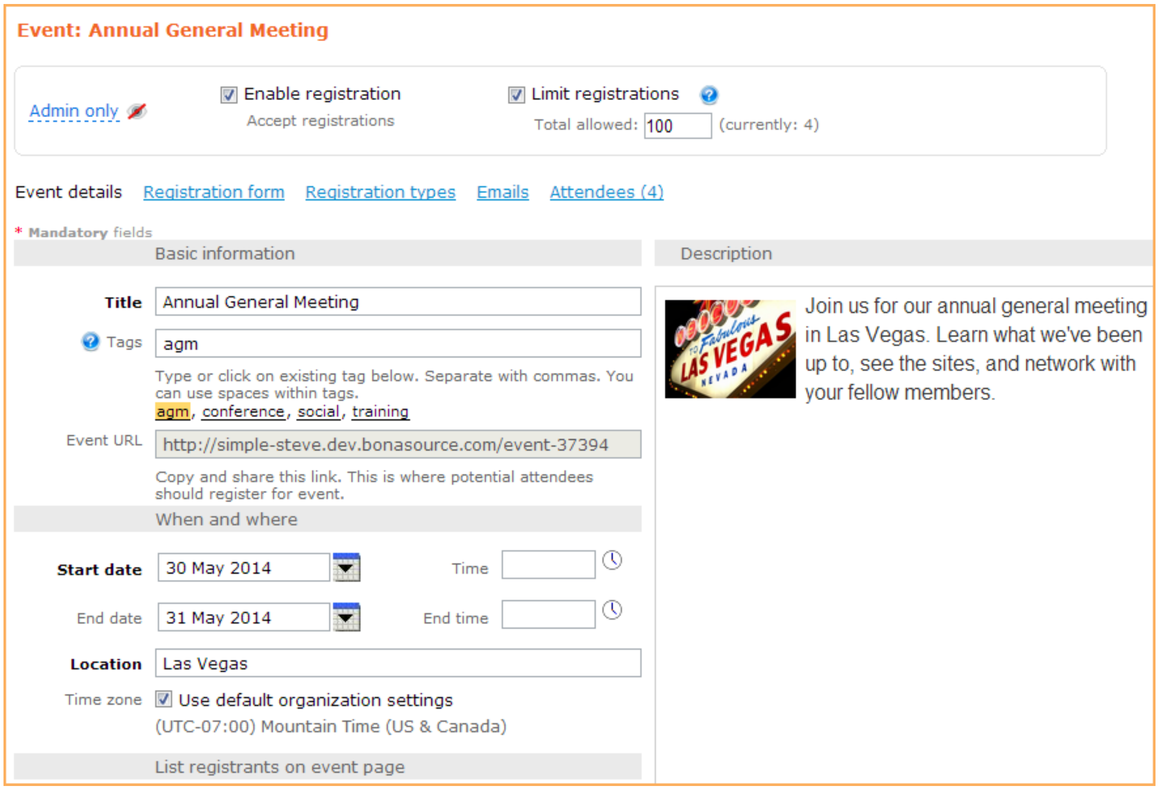
Viewing event details

To view details for a particular event (including a full list of registrants), click on the event within the list.

Read more/less



From the **Event details** screen, you can view event information such as event name, location, date, and cost, and control whether visitors to your site can see and register for the event. To modify any of this information, click the **Edit** button.



You can also set up registration types and event emails, and customize the registration form. For more information, see Setting up events
.

On this page:

- Managing events
- Adding an event
- Filtering the event list
- Flagging different event types
- Viewing event details

Expand all sections

See also:

- Cancelling events and registrations

Setting up events

Setting up events

You can create any number of events for your site. Visitors to your site can view event details, register for events, and pay for events online. Events can be used to organize conferences, classes, or any other activity that requires registration and/or online payment.

For each event, you can specify the event details, set up registration types and event emails, and customize the registration form. You can set registration limits for the entire event, and for individual registration types. You can add event-specific fields to the registration form, including options for extra cost items such as premium seating or meal choices. You can also designate an event organizer who will receive copies of event registration confirmations, event announcements and reminders, as well as replies to event emails.

Once you create an event and enable registration, it will automatically be listed on your event calendar, though you can filter the event calendar and control the visibility of individual events. So that visitors can see your events and register for them, you can add an event calendar gadget to a page on your website, and make the page accessible to non-administrators. For more information, see Publishing your event calendar .

You can also add an upcoming event gadget to a page on your site, and insert or email a link to a specific event by copying the **Event URL** within the event settings.

What you need to know

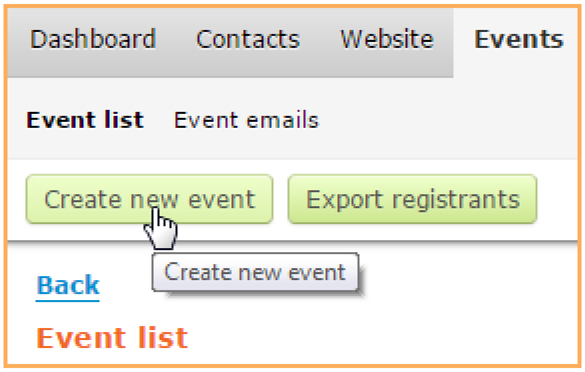
- Before you can save an event, you have to enter the event title and start date.
- Before you can enable registration, you have to set up at least one registration type.
- You must save your changes to event details before adding registration types.

Creating a new event

To add a new event, follow these steps:

Read more/less

1. Hover over the **Events** menu and select the **Event list** option.
2. From your events list, click the **Create new event** button.

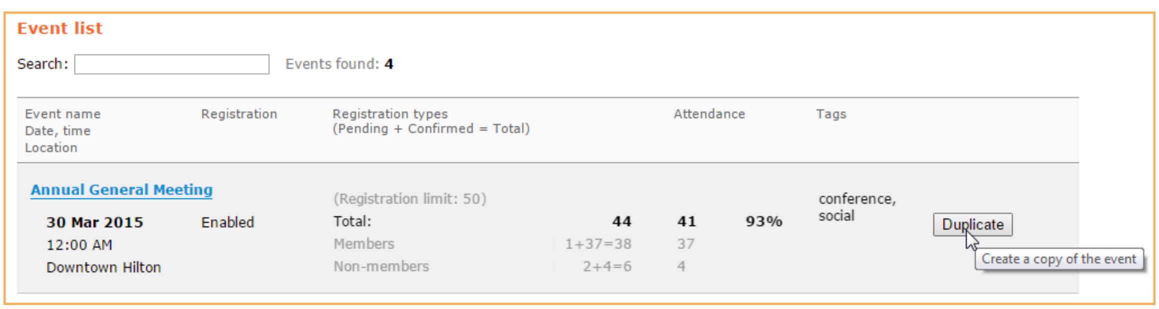


3. On the screen that appears, you can specify the event name, location, date, and cost of the event. The event title and start date are required fields. For more information, see Specifying event details (below).
4. After you enter the required information, you click the **Save** button to save the event.
5. Click the **Registration form** link to customize the event registration form. For more information, see Customizing the registration form .
6. Click the **Registration types & settings** link to set up your event registration types (or ticket types). You must create at least one registration type before you can enable registration for an event. For more information, see Event registration types . From the **Registration types & settings** tab, you can also set a registration limit for the event, and control whether multiple registrations are allowed.
7. Click the **Emails** link to set up email announcements, reminders, and confirmations for your event. For more information, see Event emails.
8. Click the **Event details** link to return to the event details screen. From here, you can enable registration, limit the number of registrants, and control who can access the event, either directly from the event calendar or via a link. Initially, access for new events is set to admin only. For more information, see Event visibility.

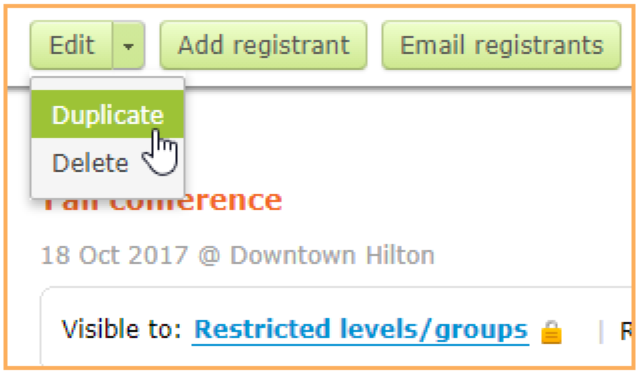
Copying an existing event

You can create a copy of an existing event by clicking the **Duplicate** button beside the event within the events list.

Read more/less



Alternatively, you could copy an event from its event details by clicking the down arrow beside the **Edit** button then clicking the **Duplicate** option.



The new duplicate event will be saved as an admin-only event but will not be opened, allowing you to continue to make more copies of the event. The word **(copy)** will be appended to the name of the duplicate event to distinguish it from the original one.

All event settings will be duplicated, other than event access permissions, multiple sessions, and the list of registrants.

> If you have repeated or recurring events, you can set up a generic version of the event and copy it to create each individual occurrence.

After duplicating an event, you can modify the duplicate event without affecting the original event that you copied.

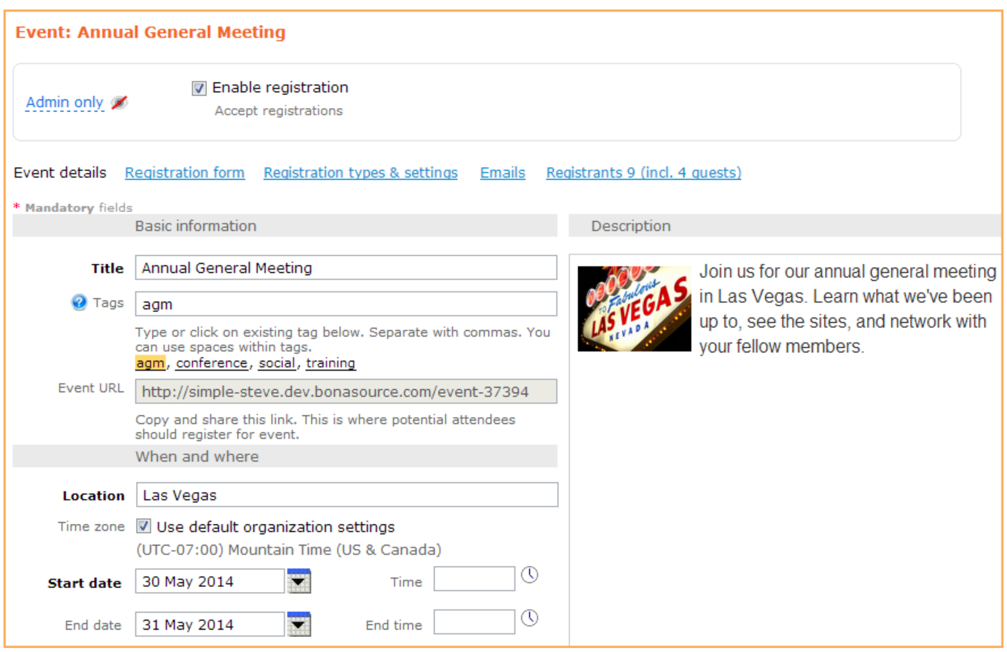
Modifying an existing event

To modify an existing event, click the event within the events list then click the **Edit** button.

Specifying event details

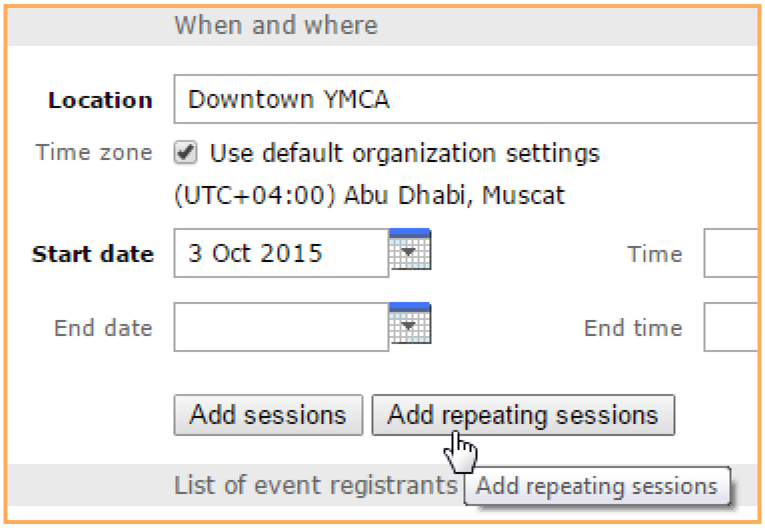
After you've created an event, the **Event details** screen appears. To view the **Event details** screen for an existing event, click the event within the events list.

Read more/less



From here, you can specify the event name, location, date, and cost, and control whether visitors to your site can see and register for the event. The event title and start date are required fields.

For events that consist of multiple sessions, you can add individual sessions manually and/or specify the schedule of regularly recurring sessions.

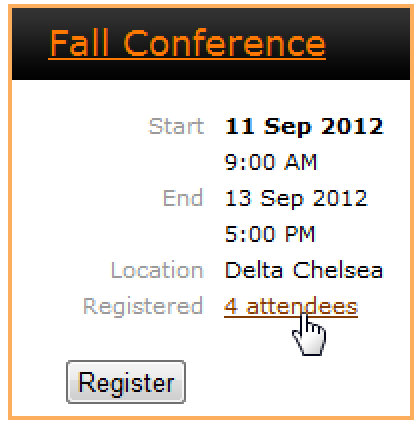


To begin modifying the event details, click the **Edit** button towards the top of the screen.

The following settings are available:

Setting	Description
Visible to	Controls who can view this event other on an event calendar or via a direct link. You can make this event public, restrict the visibility of the event by membership level, member groups, or limit access to administrators only. For more information, see Event visibility.
Enable registration	Controls whether people can register online. Disabling registration allows you to notify people about an event that does not require registration. Before you can enable registration, you have to create one or more registration types. Before you can set up registration types, you have to save your changes to the event details.
Title	The event name.
Event URL	The Internet address of the event details page for this event. You can share this link through social media or paste it into an email.
Tags	Labels used to categorize events (see Event categories). If you want to list different events on different event calendars, you can set each calendar to display only those events with a particular tag.
Description	A complete description of the event. You can use rich text formatting and insert pictures, documents, links, etc. For more information, see Using the content editor.
Additional event information	Information to be inserted in the registration confirmation email that goes out to registered participants. You could, for example, mention any cancellation fees. This information is inserted using the {Event_Extra_Info} macro. For instructions on customizing the registration confirmation email, see Event emails .
Location	The location of the event.
Time zone	Choose whether to use your organization's time zone or select a different one.

Start date	The event's start date. The date format is based on your organization's settings (see Organization Timezone).
Time	The start time of the event. The time format is based on your organization's settings (see Organization Timezone).
End date	The date the event ends.
End time	The time the event ends.
Add sessions	If your event consists of multiple sessions, you can click the **Add sessions** button to add sessions manually, or click the **Add repeating sessions** button to regularly recurring sessions. After you have added sessions, you can click the **Edit sessions** button to add, modify, or delete sessions. For more information, see Multi-session events.

Show registrants who want to be listed	Choose whether to publish a list of registrants for the event. Doing so may encourage others to register or promote networking. If you enable this option, a **Registered** link will appear for the event on the event calendar and on the event details.  Clicking the link will display the name of each registrant and the date of registration. If the registrant is a member, their name will be linked to their profile.  The registrant will be listed as **Anonymous user** if the registrant has unchecked **Include name in list of event registrants** on the registration form, or if a member has agreed to be added to the list but does not share his information with the public, and you have set your list to be visible to everyone (see Member privacy settings). You can control whether the registrants list is visible to all visitors or just members, and whether the list includes pending registrations (for which payment has not yet been received).
Include pending registrations	Choose whether to include pending registrations in the list of event registrants.

<table>
<tr>
<td>Guest registration</td>
<td>Controls whether guests are automatically added to your contact database after the main registrant confirms the registration. You have the following options:
<table>
<tr><th>Option</th><th>Description</th></tr>
<tr><td>Do not add new guests to contacts list</td><td>Guests will not be added to your contact database even if they provide contact details or complete the registration form.</td></tr>
<tr><td>Add new guests to contacts list only if email entered</td><td>Guests will be added to your contact database only if they provide an email address.</td></tr>
<tr><td>Add all new guests to contacts list</td><td>Guests will be added to your contact database even if they do not provide an email address.</td></tr>
</table>
</td>
</tr>
</table>

For instructions on providing registration messages and payment instructions, see Event registration types.

Customizing the registration form

You can customize the event registration form by adding event-specific fields to collect information such as seating or meal choice, and even up-sell some extra options to your registrants. You can also control which common fields appear on the registration form.

Read more/less

To add event-specific fields to the registration form – or choose the common fields that appear – click **Registration form**. For more information, see Customize event registration form.

You can also customize the appearance of the event registration form by modifying the event registration system page.

Setting up registration types

Setting up different registration types allows you to charge different prices for different event packages or for different kinds of attendees.

Read more/less

For example, you might want to charge more for non-members, or for special seating, and less for early-bird registrations. You can set registration limits – the number of tickets available – for each registration type, and define a registration window – the starting and end dates.

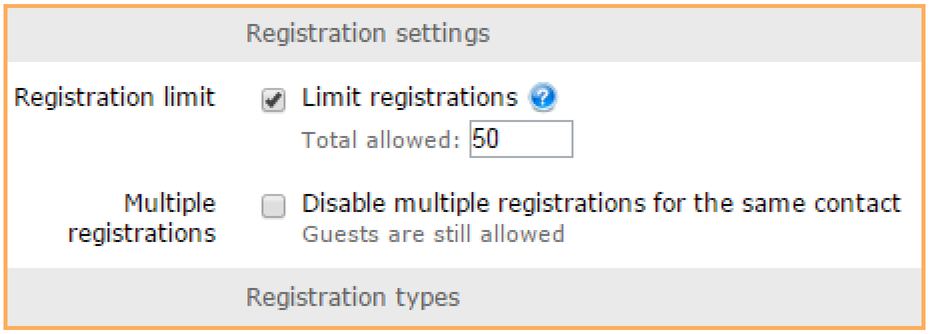
You have to set up registration types before you can enable an event for registration. To set up registration types for this event, click the **Registration types & settings** tab. For more information, see Event registration types. If you have made any changes to the event details, you must save them before you can jump to the registration types tab.

Setting a registration limit

You can limit the number of registrations for the entire event, or for specific registration types . When the registration limit is reached, registration will be automatically disabled for the event or the registration type, and the event organizer will receive an email notification.

Read more/less

To set an overall registration limit for the event, click the **Registration type & settings** tab, then check the **Limit registrations** check box and enter the registration limit.



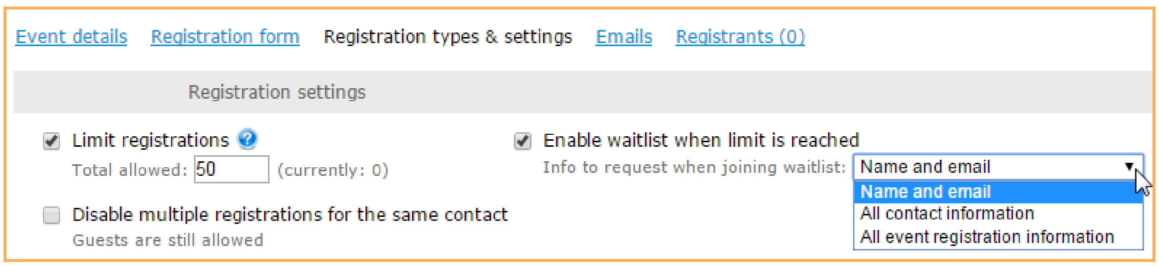
Enabling an event waitlist

Once you set a registration limit for an event or registration type, you can enable an event waitlist. You can enable a waitlist separately for each registration types and for the overall event.

To enable a waitlist for the entire event, follow these steps:

Read more/less

1. Go to the **Registration types & settings** tab for the event.
2. Click the **Edit** button to enter edit mode.
3. Make sure that the **Limit registrations** option is checked and a registration limit has been entered in the **Total allowed** field.
4. Check the **Enable waitlist when limit is reached** option.
5. Click the drop-down list and choose the how much information to collect from people wanting to join the waitlist.



6. Click **Save** at the top of the screen to save your changes.

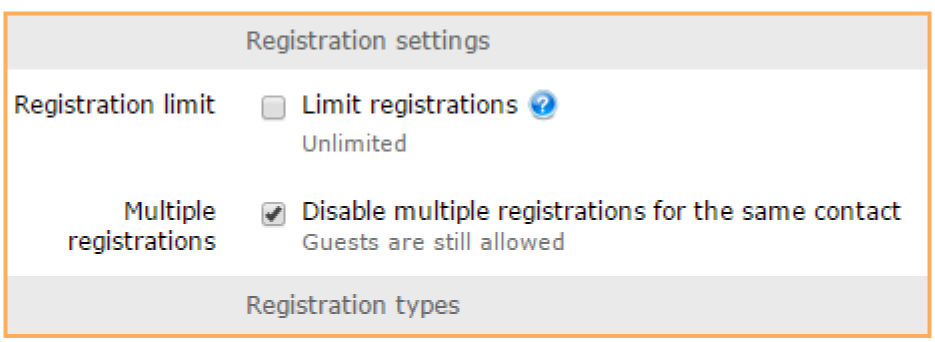
For more information, see Event waitlists.

Controlling multiple registrations

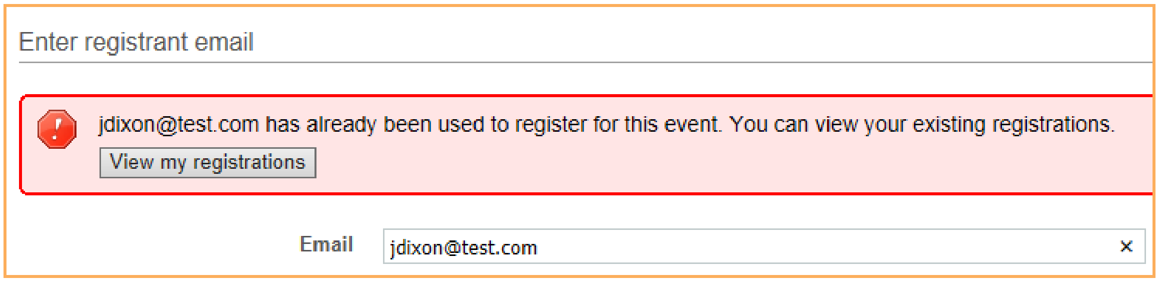
You can control whether visitors can register multiple times for the same event. You can enable multiple registrations either for the entire event or for individual registration types.

Read more/less

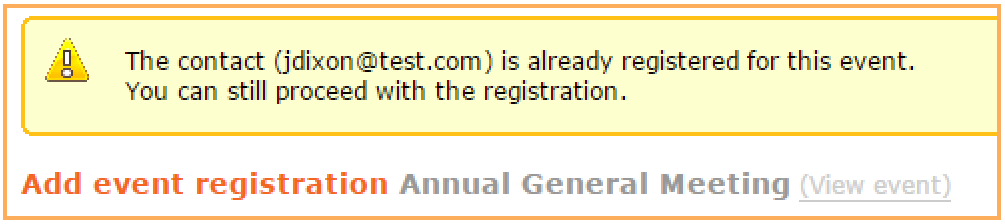
To enable or disable multiple registrations for the entire event, click the **Registration types & settings** tab and and uncheck or check th e **Disable multiple registrations for the same contact** option.



With this option checked – so that multiple registrations are disabled – an attempt by a registrant to register a second time will generate an error.



Whether the option is enabled or not, an administrator can still set up multiple registrations for a contact, but will be warned about the existing registration.

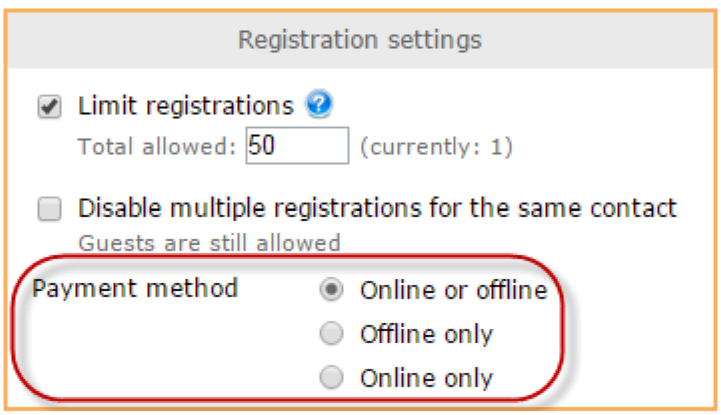


Choosing a payment method

You can control whether online and/or offline payments are accepted for the event. To choose the payment method for an event, follow these steps:

Read more/less

1. Go to the **Registration types & settings** tab for the event.
2. Click the **Edit** button to enter edit mode.
3. Choose a **Payment method** option.



4. Click **Save** at the top of the screen to save your changes.

> ⓘ The online option is only available if online payments have been enabled for your site.

Depending on which payment method option you choose, different payment workflows will take place after the registrant completes the registration form.

- If only offline payment was enabled, then the registrant will have the option of cancelling or confirming the registration. If the registrant clicks the **Confirm** button, an invoice will be emailed to them – unless invoice emails have been disabled from the Invoice and receipt settings – and a registration summary will be displayed. From the registration summary, the registrant can choose to view or pay the outstanding invoice.
- If only online payment is enabled, then a **Pay online** button will appear. Clicking the **Pay online** button will take the registrant to the online payment screen for your site's payment provider.
- If both online and offline payment is enabled, then two buttons will be displayed: **Pay online** and **Invoice me**. Clicking the **Pay online** button will take the registrant to the online payment screen for your payment provider. Clicking the **Invoice me** button will result in the registrant being emailed an invoice – which they can pay online or offline – and a registration summary being

displayed. From the registration summary, the registrant can choose to view or pay (online) the outstanding invoice.

> ⚠ When paying using PayPal Payments Pro, the **Pay online** button with be replaced with two buttons: **Pay with credit card**, and **PayPal Express checkout**.

Customizing event emails

To manage the announcements, reminders, and registration messages that are emailed for this event, click **Emails**. From the **Emails** tab, you can customize the emails, adding text, formatting, graphics, macros and links to each message. You can choose the recipients for event announcements, and schedule each email to be automatically delivered a certain number of days before the event, or you can manually send the email at any time. For more information, see Event emails .

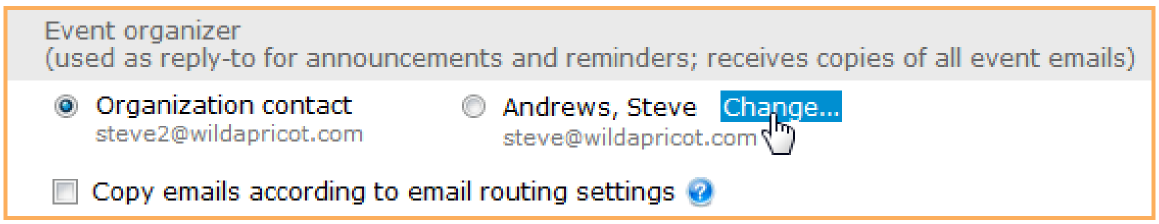
Changing the event organizer

From the **Emails** tab, you can also change the designated event organizer. The event organizer receives all event-related administrative emails, as well as a copy of event announcements and reminders, and is the default reply-to recipient for all emails related to this event.

Read more/less

If you want to monitor individual registrations, you can provide for the event organizer to also receive event registration notifications. (For more information, see Event emails). The event organizer will also be sent an email when the registration limit is reached for a particular event.

By default, the event organizer is the contact associated with the **Contact** email specified for your organization on the Organization details screen. If you want to change the event organizer to someone else, click the **Change** link under **Event organizer** after clicking the **Edit** button to enter edit mode.



From the window that appears, select a different contact to act as the event organizer.

You can also set up email routing to automatically send copies of system emails to specific administrator types and/or individual recipients. With email routing set up, you can check the **Copy emails according to email routing settings** option to send copies of event emails according to your settings.

If you want to send copies of event emails to multiple recipients – rather than a single event organizer – but don't want to use email routing, you could designate a contact representing an email group as the event organizer, with the email group's address as the contact address.

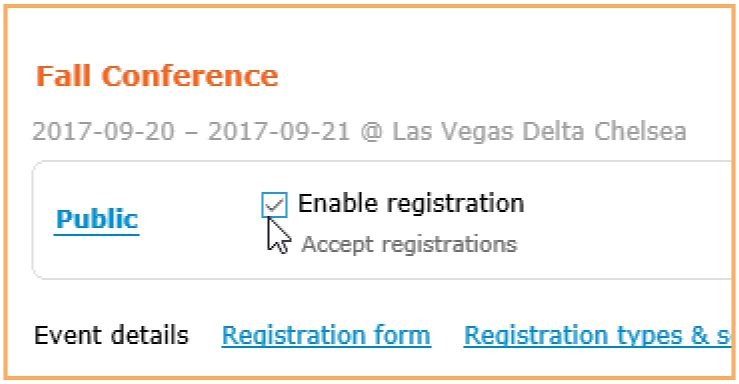
Enabling registration

Before you can enable registration, you must save the event and set up at least one registration type. You can only save an event after entering the event title and start date.

To enable registration after saving the event and setting up at least one registration type, follow these steps:

Read more/less

1. Click the event within the events list (if you're not already busy setting up the event)
2. Click the **Edit** button (if you're not already in edit mode).
3. Check the **Enable registration** checkbox.



4. Click the **Save** button to save your changes.

Character limits for events

Item	Limit
Name	255 characters
Description	50000 characters
Additional event information	2048 characters
Location	255 characters
Registration message	500 characters
Payment instructions	500 characters
Registration type name	256 characters

On this page:

Expand all sections

See also:

- Multi-session events
- Events list
- Event registration types
- Event categories (tags, labels)
- Event visibility
- Cancelling events and registrations
- Customizing event registration

form
- Extra event registration costs - dynamic event pricing
- Event emails
- Adding payment instructions
- Customizing invoices and receipts

Event details

Event details

After you've created or copied an event, the **Event details** screen appears. From here, you specify the event name, location, date, and cost, and control the kinds of visitors that can see and register for the event. You can also control whether guests are automatically added to your contact database.

What you need to know

Click/tap to expand/collapse

- Before you can save an event, you have to enter the event title and start date.
- Before you can enable registration, you have to set up at least one registration type.
- You must save your changes to event details before adding registration types.

How do you...?

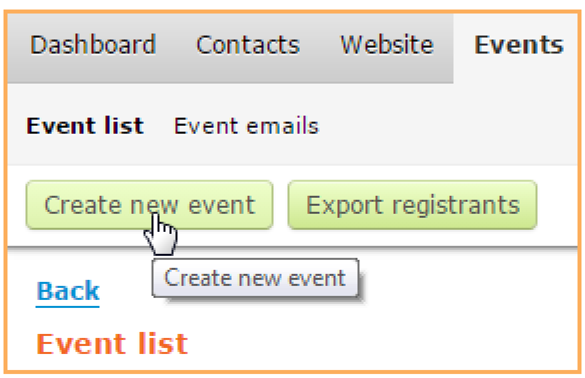
Click/tap to expand/collapse

Create an event

Adding an event

To create or add a new event, follow these steps:

1. Hover over the **Events** menu and select the **Event list** option.
2. From your events list, click the **Create new event** button.

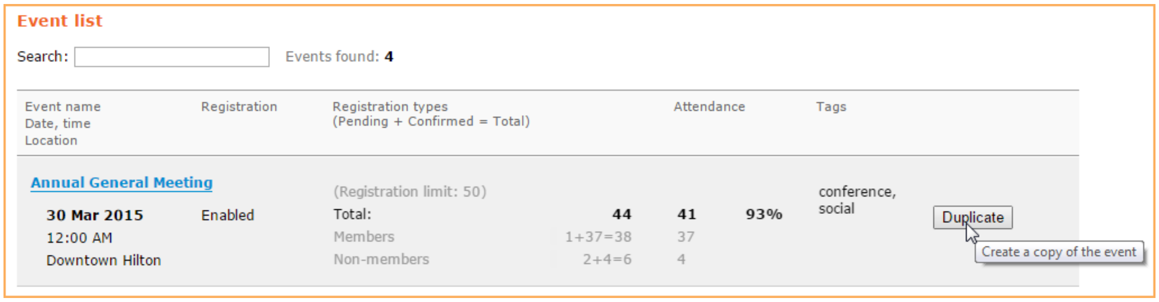


3. On the screen that appears, you can specify the event name, location, date, and cost of the event. The event title and start date are required fields.
4. After you enter the required information, you click the **Save** button to save the event.
5. Click the **Registration form** link to customize the event registration form. For more information, see Customizing the registration form .
6. Click the **Registration types & settings** link to set up your event registration types (or ticket types). You must create at least one registration type before you can enable registration for an event. For more information, see Event registration types . From the **Registration types & settings** tab, you can also set a registration limit for the event, and control whether multiple registrations are allowed.
7. Click the **Emails** link to set up email announcements, reminders, and confirmations for your event. For more information, see Event emails.
8. Click the **Event details** link to return to the event details screen. From here, you can enable registration, limit the number of registrants, and control who can access the event, either directly from the event calendar or via a link. Initially, access for new events is set to admin only. For more information, see Event visibility.

Copy an event

Copying an event

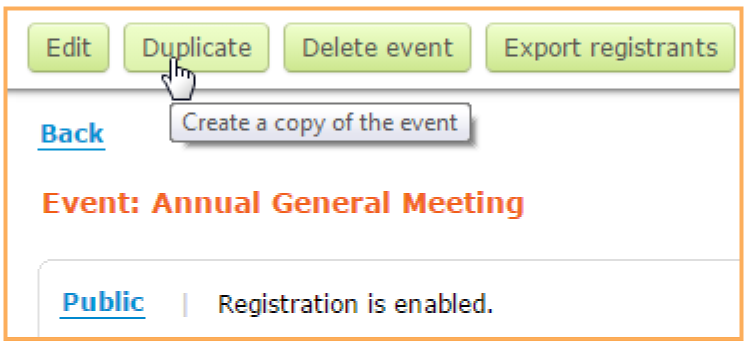
You can create a copy of an existing event by clicking the **Duplicate** button beside the event within the events list.



The new duplicate event will be saved as an admin-only event but will not be opened, allowing you to continue to make more copies of the event. The word **(copy)** will be appended to the name of the duplicate event to distinguish it from the original one.

All event settings will be duplicated, other than event access permissions, multiple sessions, and the list of registrants.

You can also duplicate an event from its event details.



ⓘ If you have repeated or recurring events, you can set up a generic version of the event and copy it to create each individual occurrence.

After duplicating an event, you can modify the duplicate event without affecting the original event that you copied.

Enable registration

Enabling registration

Before you can enable registration, you must save the event and set up at least one registration type. You can only save an event after entering the event title, location, start date, and description.

To enable registration after saving the event and setting up at least one registration type, follow these steps:

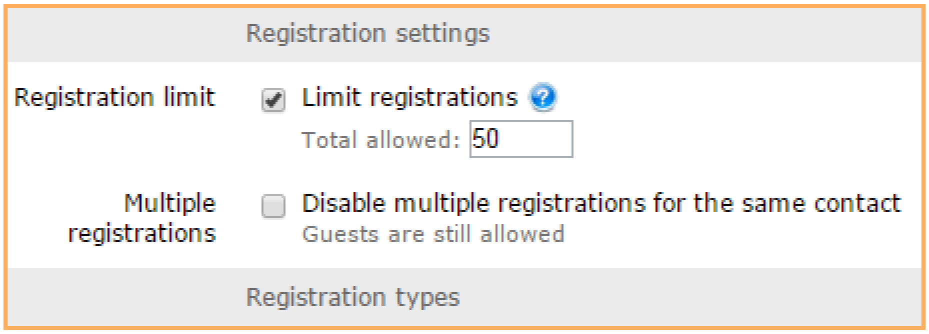
1. Click the event within the events list (if you're not already busy setting up the event)
2. Click the **Edit** button (if you're not already in edit mode).
3. Check the **Enable registration checkbox**.
4. Click the **Save** button to save your changes.

Set registration limits

Setting registration limits

You can limit the number of registrations for the entire event, or for specific registration types . When the registration limit is reached, registration will be automatically disabled for the event or the registration type, and the event organizer will receive an email notification.

To set an overall registration limit for the event, click the **Registration type & settings** tab, then check the **Limit registrations** ch eck box and enter the registration limit.



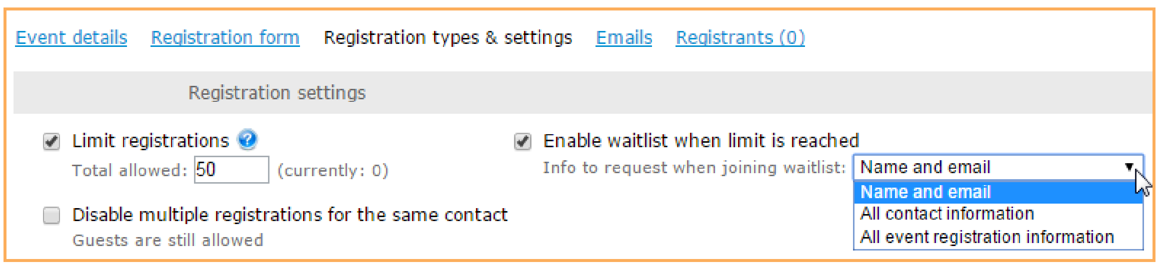
Enable an event waitlist

Enabling an event waitlist

Once you set a registration limit for an event or registration type, you can enable an event waitlist. You can enable a waitlist separately for each registration types and for the overall event.

To enable a waitlist for the entire event, follow these steps:

1. Go to the **Registration types & settings** tab for the event.
2. Click the **Edit** button to enter edit mode.
3. Make sure that the **Limit registrations** option is checked and a registration limit has been entered in the **Total allowed** field.
4. Check the **Enable waitlist when limit is reached** option.
5. Click the drop-down list and choose the how much information to collect from people wanting to join the waitlist.



6. Click **Save** at the top of the screen to save your changes.

For more information, see Event waitlists.

Control event access and visibility

Controlling event access and visibility

When you set up an event, you can restrict the visibility of the event by membership level, member groups, or limit access to administrators only. Restricted events will only appear on an event calendar for members whose membership level has been granted access.

You might want to restrict access to your event while you are setting it up, or you might want it to remain restricted to administrators so you can control and approve registrations individually. If you want to offer a preview of an upcoming event, you can make the event accessible without enabling registration.

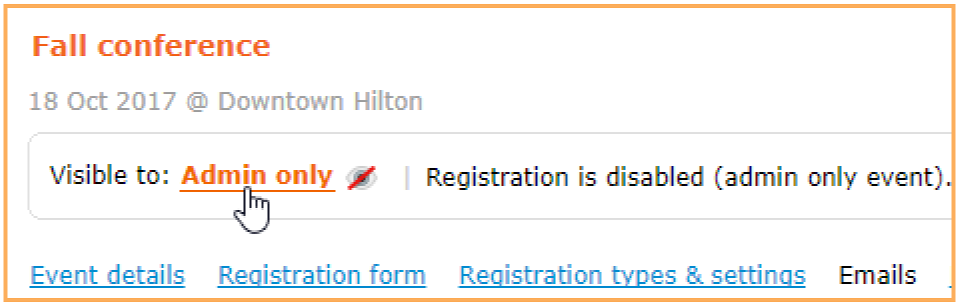
When you create an event, it will initially be restricted to administrators but with registration disabled.

> You can also filter event calendars by event tags, restrict access to individual registration types by membership level, and restrict access to the page on which the event calendar appears by membership levels, members groups, or administrators only.

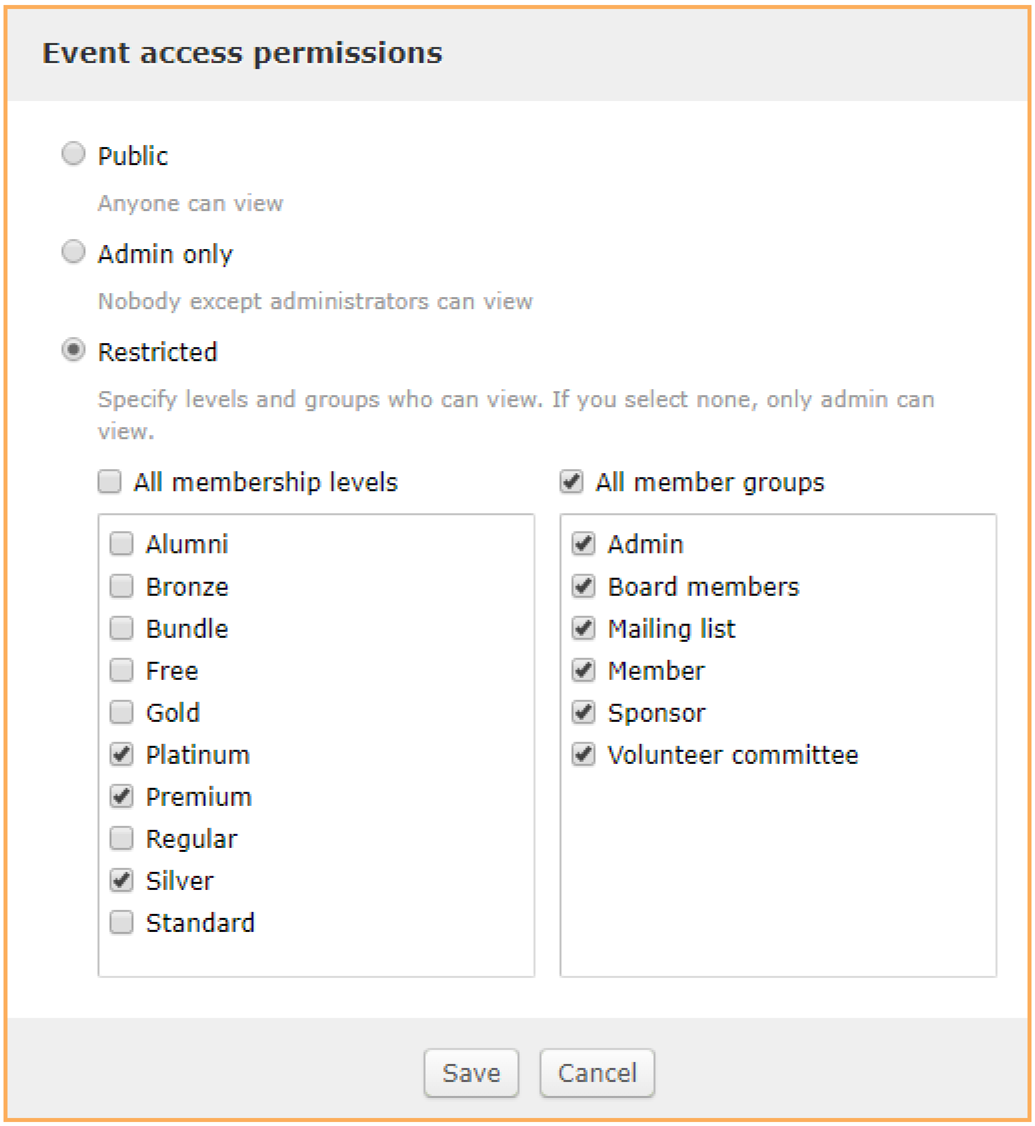
To control event visibility, follow these steps:

1. Hover over the **Events** menu and select the **Event list** option.
2. Select the event within the list.
3. Within the event details, click the **Edit** button to enter edit mode.

4. Click the link beside the **Visible to** heading displaying the current access level – **Admin only**, **Public**, or **Restricted levels/groups**.



5. Within the dialog that appears, click the appropriate access option.
6. If you select the **Restricted** option, check each of the membership levels or member groups you want to be able to see the event.

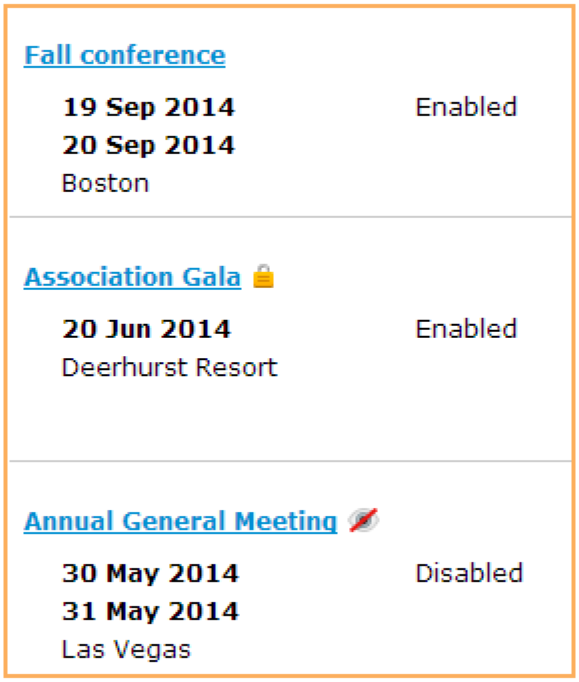


If you restrict access by both membership levels and membership groups, then members who belong to any of the selected levels **or** groups will be able to view the event. If you check the **All levels** or **All groups** option then all levels or groups – including any levels or groups added in the future – will be selected.

7. Click **Save** to save your choice.

8. Click **Save** to save the changes to your event.

Within your events list, restricted events are flagged by a lock icon, and admin-only events are indicated by a crossed-out eye.



Troubleshooting

My event is not appearing in my event calendar

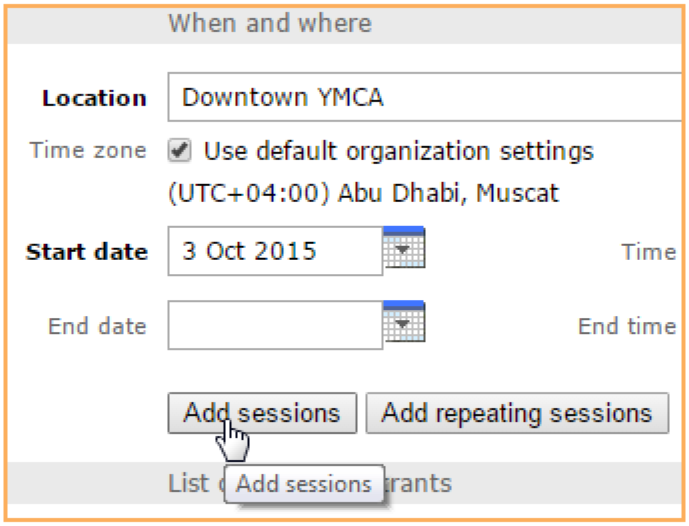
- Check the event access setting. If it's currently set to *Admin only*, change it to *Public* or *Restricted* (if you want to restrict access by membership levels and/or member groups).
- Check the settings for your event calendar. They might be set to filter the event calendar by event tag.

Set up multiple session events

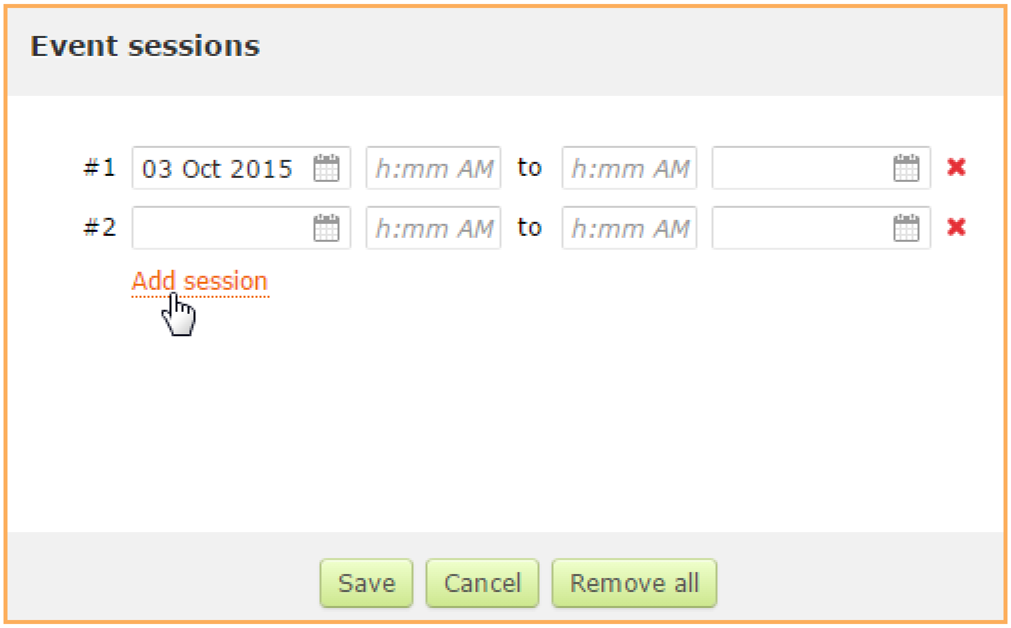
Adding sessions manually

To add individual event sessions manually while setting up an event, click the **Add sessions** button within the **When and where** section of the event details screen.

Read more/less



On the dialog that appears, enter the starting and ending date and time of the first session, then click **Add session** to add more sessions.



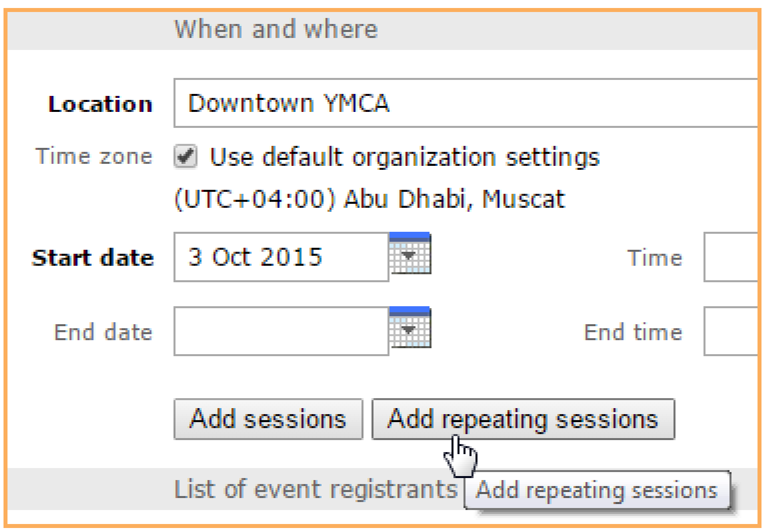
You can click the calendar control to select a date from the calendar. To remove sessions, click the **X** button beside the sessions you want to remove, or click the **Remove all** button to remove all event sessions.

Once you are finished adding sessions, click the **Save** button. The sessions will now be listed within the **When and where** sectio n of the event details.

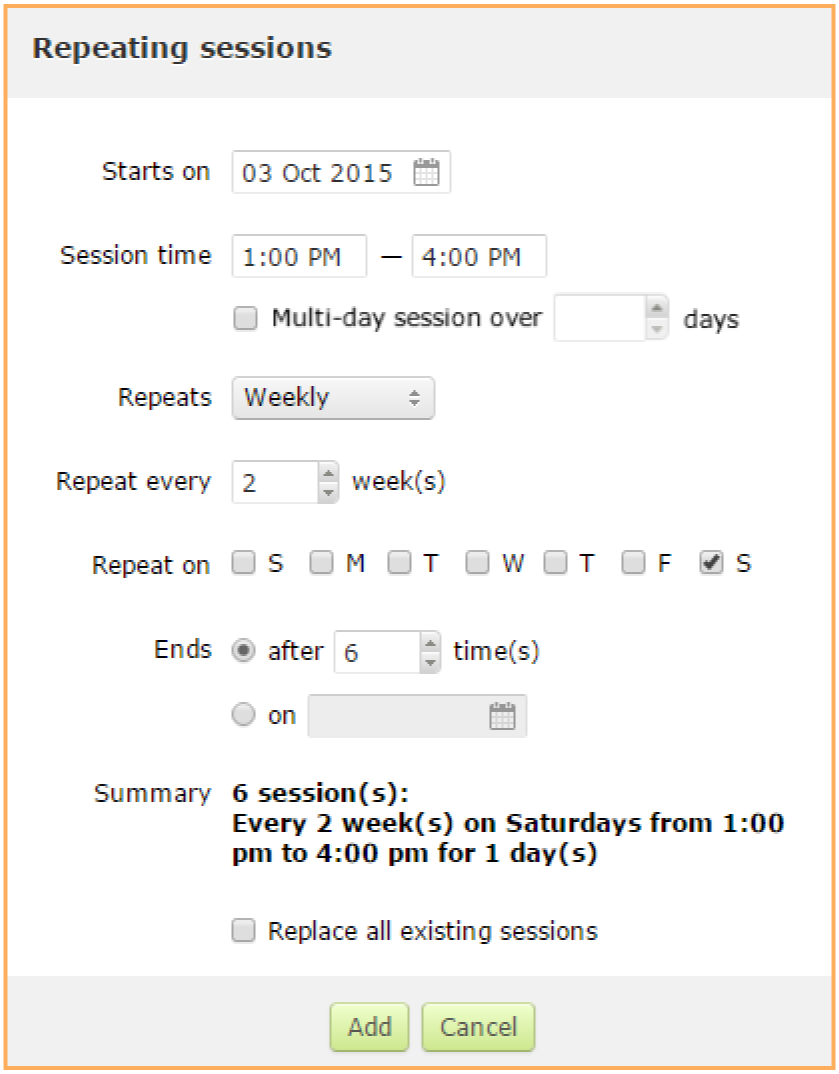
Adding repeating sessions

If event sessions repeat on a regular schedule – e.g. the 1st Monday of each month – you can quickly add multiple sessions by specifying the session schedule. To specify the schedule of repeating sessions, click the **Add repeating sessions** button within the **When and where** section of the event details screen.

Read more/less



On the dialog that appears, you can provide the details of the repeating sessions.



After specifying the first session date and time, you click **Repeats** and choose how often the session repeats. For example, if the session repeats on the same day every week, you'd pick **Weekly** as your **Repeats** option. For other examples, see Repeating session examples (below). If the sessions span multiple days, you can check the **Multi-day session** checkbox and specify the number of days over which the session takes place.

Finally, you indicate how many sessions make up the event by either specifying the total number of sessions in the **Ends** field or selecting an end date from the calendar control.

If you want the sessions you are adding here to replace any sessions already set up, check the **Replace all existing sessions** c heckbox. If this option is unchecked, these sessions will be added to any existing ones.

Here is a complete list of the options appearing on the **Repeating sessions** dialog:

Option	Description
Starts on	The start date of the first session to be added.
Session time	The start and end time of the session(s) being added.
Multi-day session	If sessions span multiple days, check this box and specify the number of days over which the session takes place.
Repeats	Controls whether the sessions repeat daily, weekly, monthly, or annually.

Repeat every *x* days/weeks/months/years	Controls the number of days, weeks, months, or years between repeating sessions. For examples, sessions that take place every other week would be set to repeat every 2 weeks.
Repeat on	For reasons that repeat weekly, controls which weekdays the sessions repeat on.
Repeat by	For sessions that repeat monthly, controls whether the sessions take place on the same day of the month (e.g. October 15th) or the same day of the week (e.g. the third Thursday in October).
Ends	Controls whether the sessions end after a particular number of sessions have taken place, or on a particular date.
Replace all existing sessions	Controls whether the repeating sessions you are adding at the moment will replace the sessions already set up for this event, or will be added to the existing sessions.

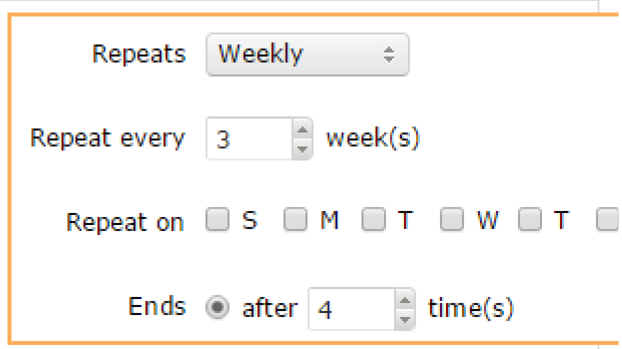
Once you are finished specify the repeating session schedule, click the **Add** button.

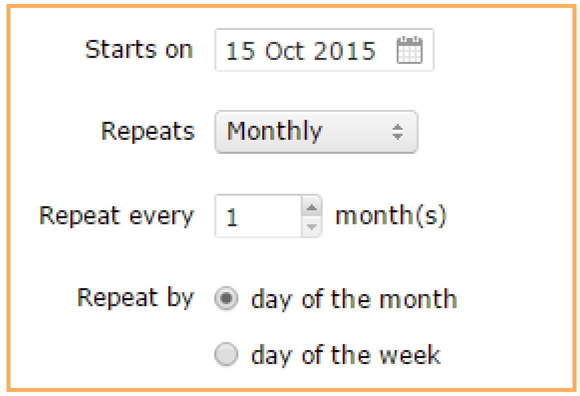
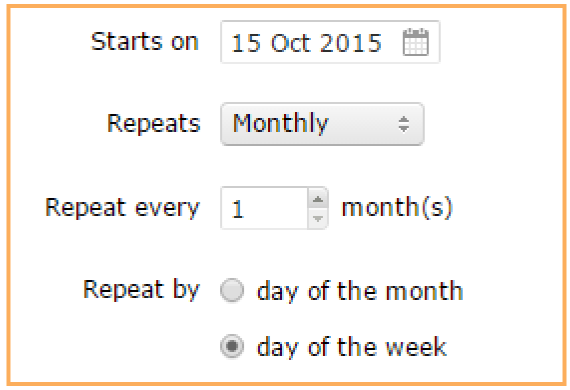
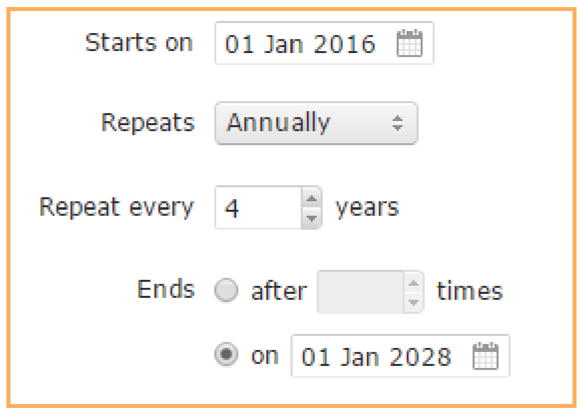
The sessions will now be listed within the **When and where** section of the event details.

After adding event sessions, you can modify or delete them, or add more.

Repeating session examples

Read more/less

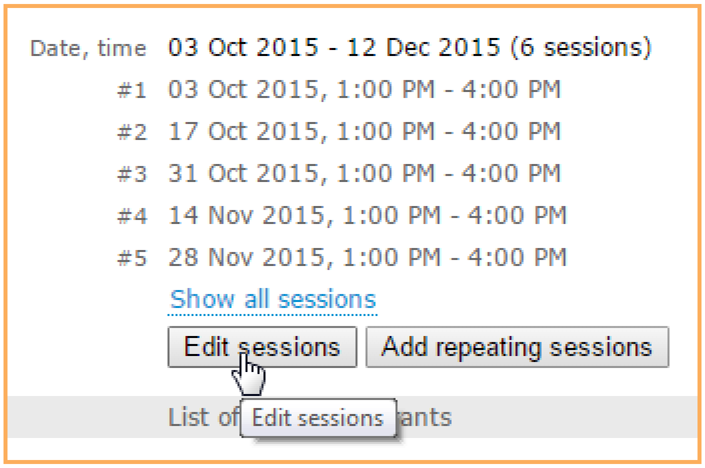
Example	Settings
Every other day for a total of 10 sessions	
Every third Saturday over a 12-week period	

Every month on the 15th	
Every month on the third Thursday	
Every 4 years on New Year's Eve until 2028	

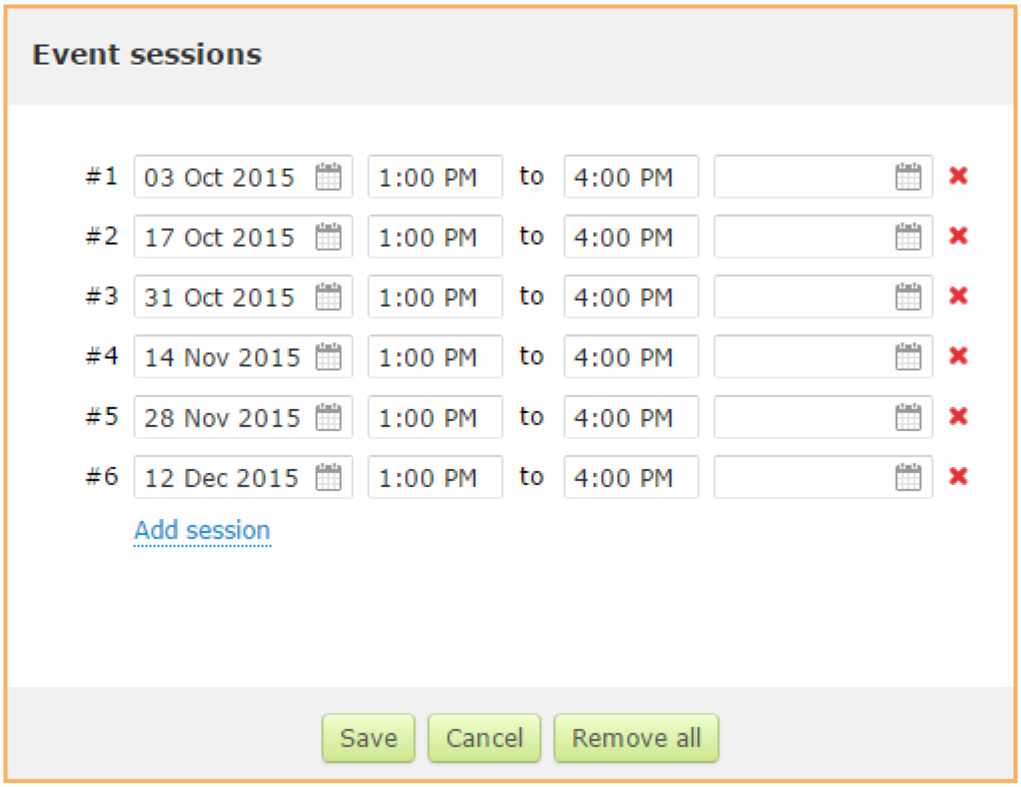
Modifying sessions

After you have added event sessions – whether manually or through the **Repeating sessions** dialog – you can modify and delete them, or add more. To modify event sessions, click the **Edit sessions** button within the **When and where** section of the event details.

Read more/less



From the dialog that appears, you can add, modify, and remove event sessions.



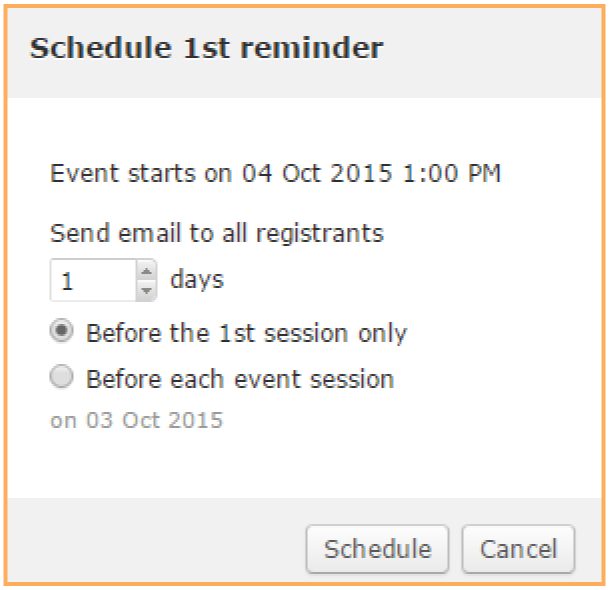
To add an event sessions, click the **Add session** button. To modify an event session, click within the box displaying the start or end date or time and enter a different value, or click the calendar control to select a date from the calendar.

To remove sessions, click the **X** button beside the sessions you want to remove, or click the **Remove all** button to remove all event sessions.

Scheduling emails for multi-session events

When scheduling reminders for multi-session events, the **Schedule** dialog allows you to choose whether to send before each event session, or just before the first session.

Read more/less



If the first session has already taken place, then the only option will be to send the reminder before each session.

Multi-session event email macros

The following macros be used in event emails for multi-session events:

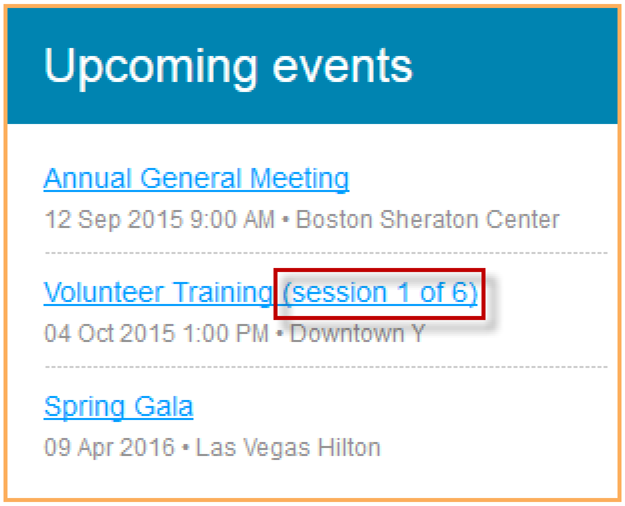
Read more/less

Macro	Description	Email type
Event_UpcomingSessionDate	The start date of the next upcoming session.	Reminder
Event_UpcomingSessionTime	The start time of the next upcoming session.	Reminder
Event_UpcomingSessionEndDate	The end date of the next upcoming session.	Reminder
Event_UpcomingSessionEndTime	The end time of the next upcoming session.	Reminder
Event_SessionsList	A list of all sessions (including past ones) using the following format: #1 <date range> #2 <date range> ...	all

How multi-session events appear to the public

Within an upcoming events gadget, each session will be displayed separately, with the session number automatically appended to the event name.

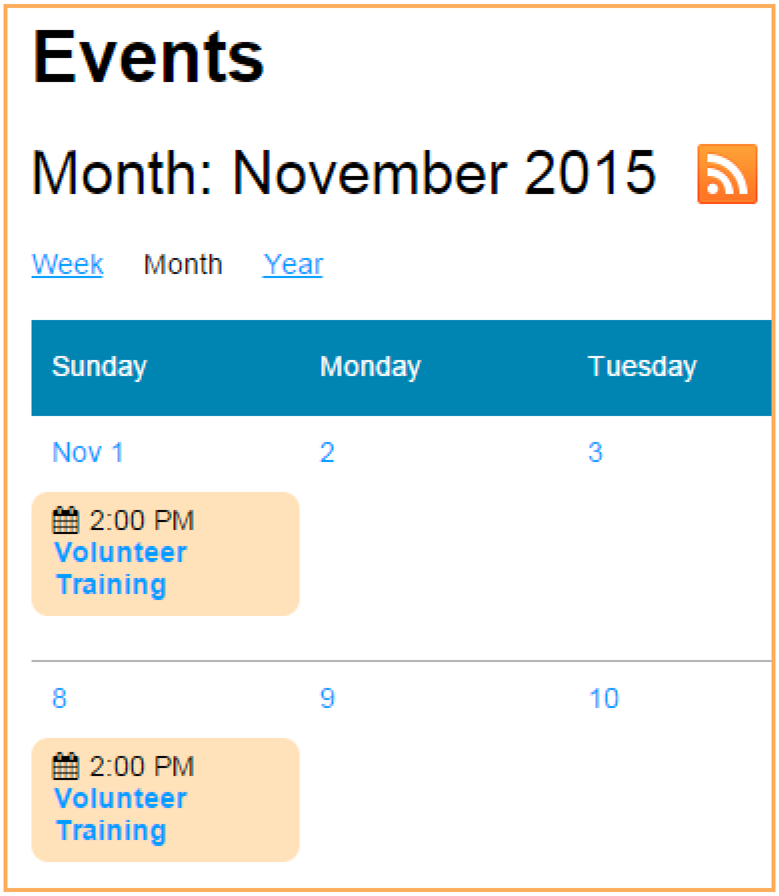
Read more/less



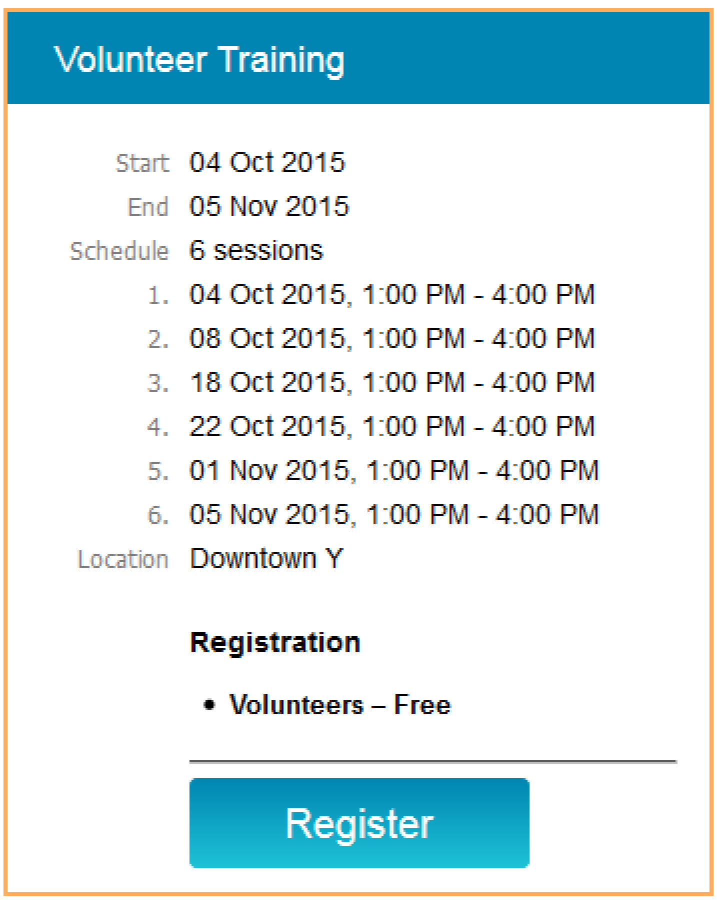
If you want, you can hide the session number within the upcoming events gadget.

Within event calendars, the summary of multi-session events will include the number of sessions.

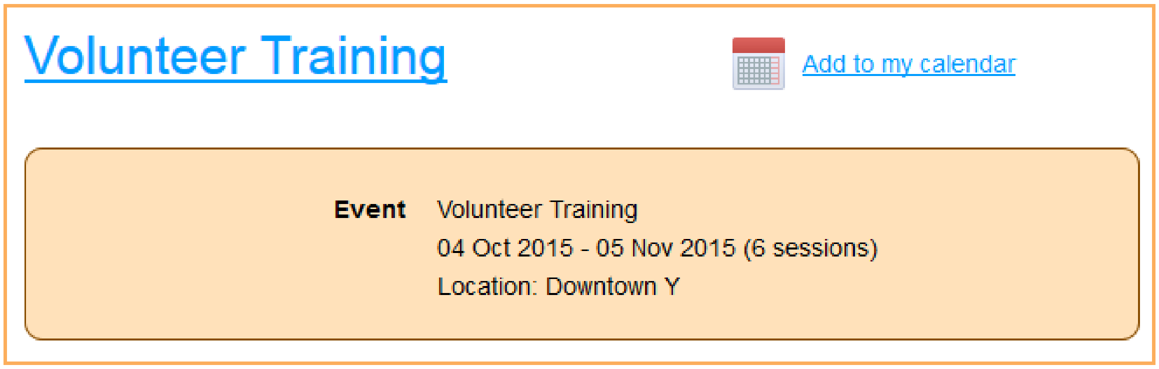
Within calendar view, individual sessions will appear separately.



Within the event details, the entire session schedule will be displayed.

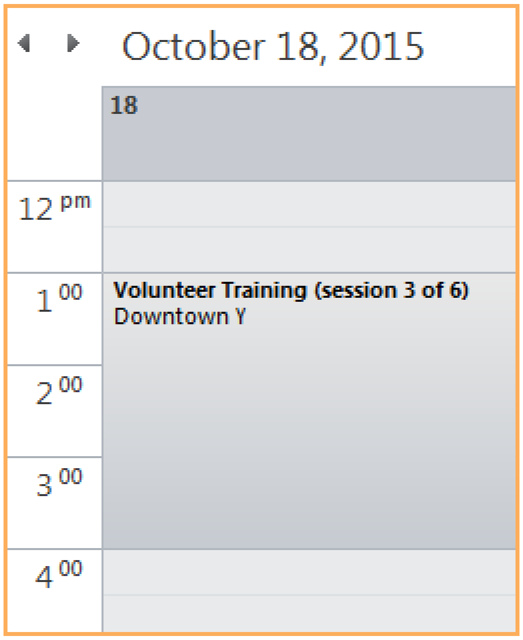


When a visitor clicks the **Register** button to register for the event, the event summary that appears on various registration screens will include the number of sessions, as well as the start and end dates.



Visitors register once for all event sessions. They cannot pick and choose which sessions they want to register for.

When exporting the event to an external calendar program, each session will appear separately, with the session number and the total number of sessions automatically added to the event name.



Hiding the session number within upcoming events gadgets

Within an upcoming events gadget, the session number is automatically appended to the event name. To remove the session number, follow these steps:

Read more/less

1. Go to **Settings** then click **Global JavaScript** (under **Site settings**).
2. On the **Global JavaScript** screen that appears, copy and paste the following code:

```
<script type="text/javascript">
$(function()
{
if( $('.WaGadgetUpcomingEvents').size() )
{
$('.WaGadgetUpcomingEvents a:contains("(session")').each(function()
{ var text = $(this).html(); var newText =
text.replace(/(\s+\(session[\w\s]+\))/, ""); $(this).html(newText); }
);
}
});
</script>
```

3. Click **Save**.

Checking in attendees at multi-session events

Currently, checking in attendees takes place at the event level, so attendees cannot be checked in for individual sessions.

Fields and options

Click/tap to expand/collapse

Public, Admin only, Restricted

Controls who can view this event on an event calendar or via a direct link . You can make this event public, restrict the visibility of the event by membership level , member groups , or limit access to administrators only. For more information, see Event visibility .

Enable registration

Controls whether people can register online. Disabling registration allows you to notify people about an event that does not require registration. Before you can enable registration, you have to create one or more registration types . Before you can set up registration types, you have to save your changes to the event details.

Title

The name of the event as it will appear to visitors on the event calendar and upcoming events gadgets.

Event URL

The Internet address of the event details page for this event. You can share this link through social media or paste it into an email.

Tags

Labels used to categorize events (see Event categories). If you want to list different events on different event calendars, you can set each calendar to display only those events with a particular tag.

Description

A complete description of the event. You can use rich text formatting and insert pictures , documents , links , etc. For more information, see Using the content editor .

Additional event information

Information to be inserted in the registration confirmation email that goes out to registered participants. You could, for example, mention any cancellation fees. This information is inserted using the {Event_Extra_Info} macro . For instructions on customizing the registration confirmation email, see Event emails .

Location

The location of the event. This will appear on event calendars and upcoming events gadgets.

Time zone

Choose whether to use your organization's time zone or select a different one.

Start/end date and time

The event's start date and time, and end date and time. The date format is based on your organization's settings (see Organization

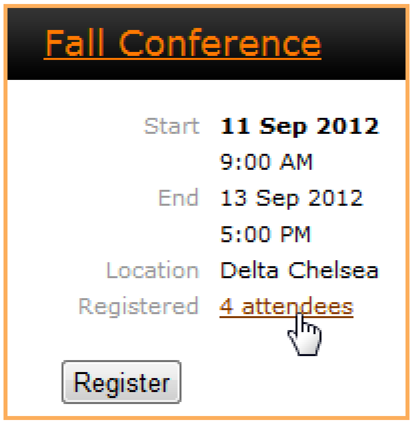
Timezone).

Add sessions/repeating sessions

If your event consists of multiple sessions, you can click the **Add sessions** button to add sessions manually, or click the **Add repeating sessions** button to regularly recurring sessions. After you have added sessions, you can click the **Edit sessions** button to add, modify, or delete sessions. For more information, see Multi-session events .

Show registrants who want to be listed

Choose whether to publish a list of registrants for the event. Doing so may encourage others to register or promote networking. If you enable this option, a **Registered** link will appear for the event on the event calendar and on the event details.



Clicking the link will display the name of each registrant and the date of registration. If the registrant is a member, their name will be linked to their profile.

The registrant will be listed as **Anonymous user** if the registrant has unchecked **Include name in list of event registrants** on the registration form, or if a member has agreed to be added to the list but does not share his information with the public, and you have set your list to be visible to everyone (see Member privacy settings).

You can control whether the registrants list is visible to all visitors or just members, and whether the list includes pending registrations (for which payment has not yet been received).

Include pending registrations

Choose whether to include pending registrations in the list of event registrants.

Guest registration

Controls whether guests are automatically added to your contact database after the main registrant confirms the registration. You have the following options:

Do not add new guests to contacts list
Guests will **not** be added to your contact database even if they provide contact details or complete the registration form.

Add new guests to contacts list only if email entered
Guests will be added to your contact database only if they provide an email address.

Add all new guests to contacts list
Guests will be added to your contact database even if they do not provide an email address.

Troubleshooting

Click/tap to expand/collapse

I can't add or modify registration types

- If you're on the **Registration types & settings** tab and the **Add type** button is grayed out, its because you are currently editing other event details. You cannot add or modify registration types while in edit mode. You have to click the **Save** button to save your changes or click the **Cancel** button to discard them.

I can't enable registration

- Check whether there are any registration types set up for the event. You have to set up at least registration type before you can enable registration.

- If there are registration types already set up, go to the **Event details** tab and click the **Edit** button to enter edit mode. Now, click the **Enable registration** check box and save your changes.

My event is not showing up on my event calendar

- Check the event access setting. If it's currently set to *Admin only*, change it to *Public* or *Restricted* (if you want to restrict access by membership levels and/or member groups).
- Check the settings for your event calendar. They might be set to filter the event calendar by event tag.

See also

Click/tap to expand/collapse

- Event registration types
- Guest event registration
- Customizing and controlling event emails
- Event categories (tags, labels)
- Customizing the registration form
- Extra event registration costs - dynamic event pricing
- Cancelling events and registrations
- Adding payment instructions
- Customizing invoices and receipts
- Exporting registrants
- Adding registrants manually
- Email registrants
- Event reports

On this page:

Multi-session events

Multi-session events

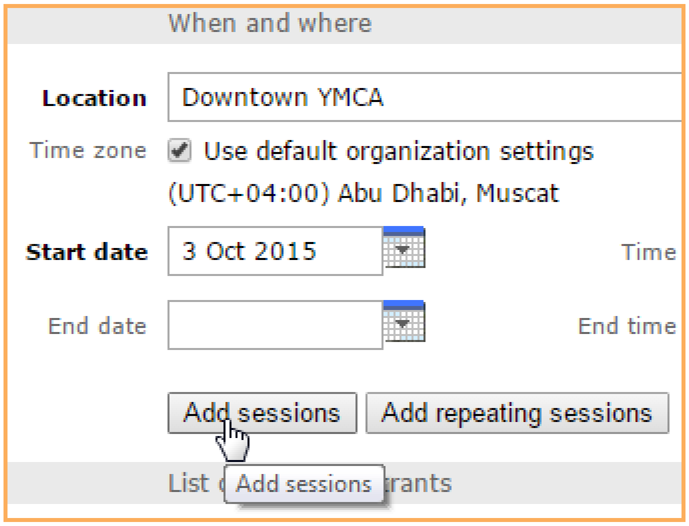
You can set up an event consisting of multiple sessions occurring on different days. You can add individual sessions manually and/or specify the schedule of regularly recurring sessions.

You can add up to 120 sessions per event.

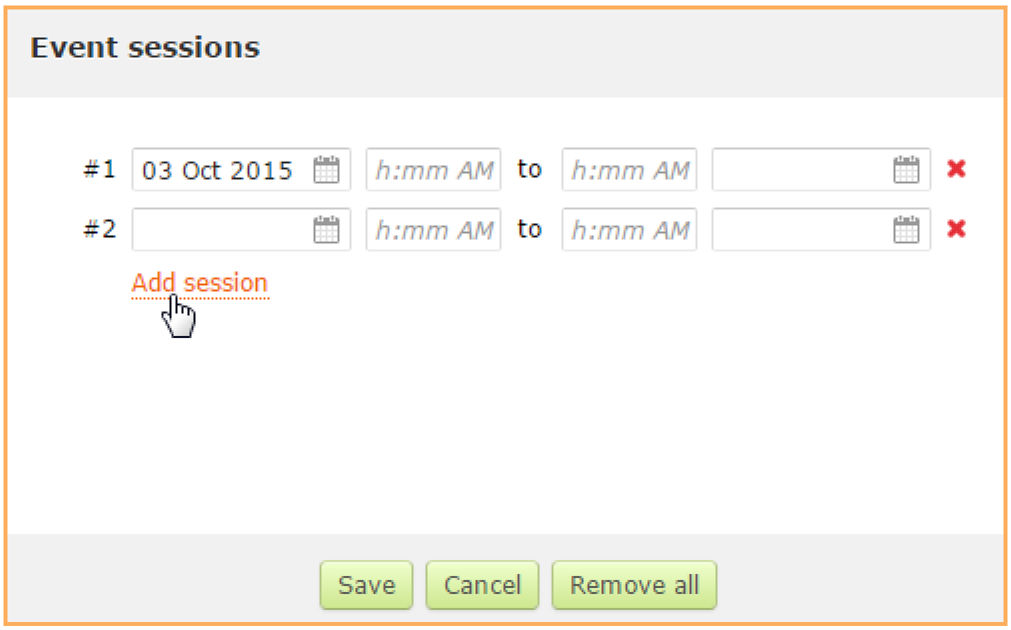
Adding sessions manually

To add individual event sessions manually while setting up an event, click the **Add sessions** button within the **When and where** section of the event details screen.

Read more/less



On the dialog that appears, enter the starting and ending date and time of the first session, then click **Add session** to add more sessions.



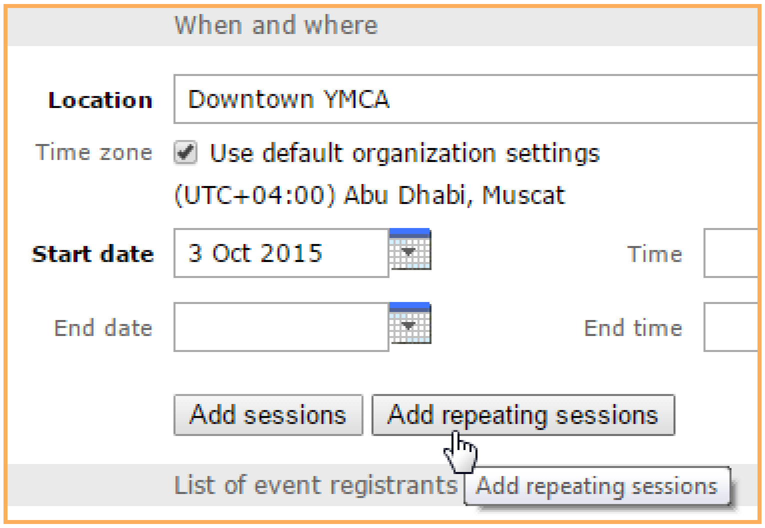
You can click the calendar control to select a date from the calendar. To remove sessions, click the **X** button beside the sessions you want to remove, or click the **Remove all** button to remove all event sessions.

Once you are finished adding sessions, click the **Save** button. The sessions will now be listed within the **When and where** section of the event details.

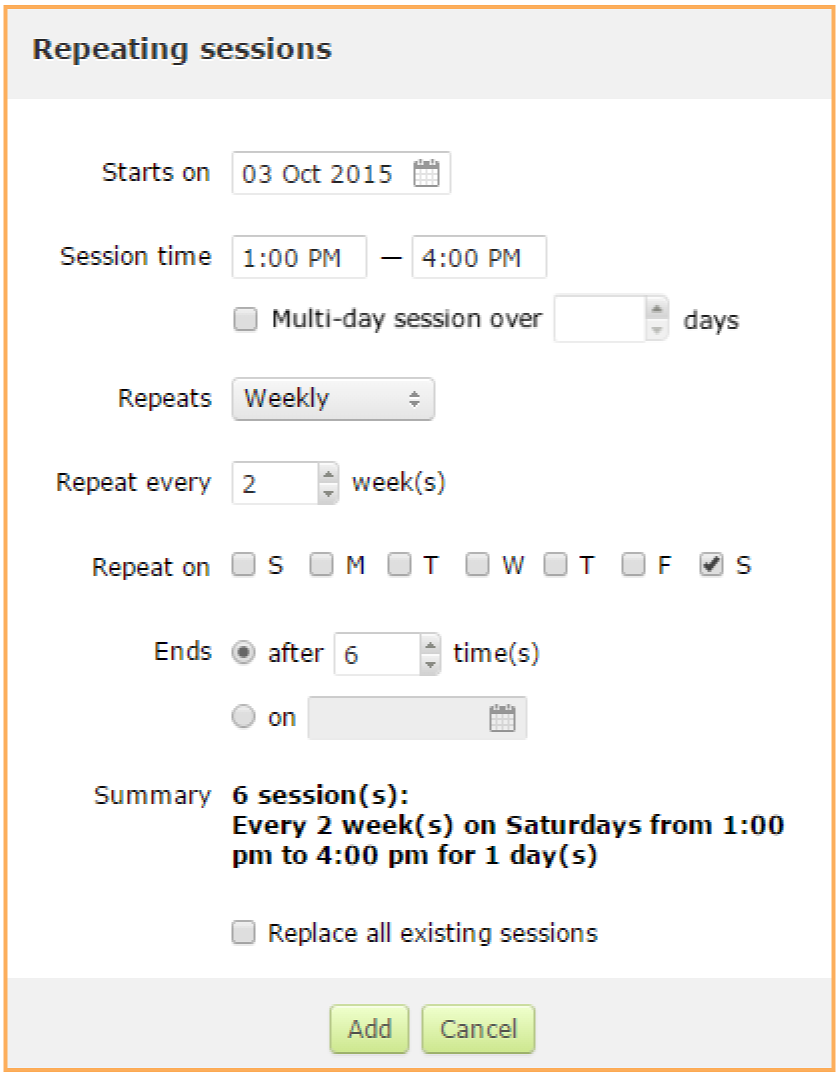
Adding repeating sessions

If event sessions repeat on a regular schedule – e.g. the 1st Monday of each month – you can quickly add multiple sessions by specifying the session schedule. To specify the schedule of repeating sessions, click the **Add repeating sessions** button within the **When and where** secti on of the event details screen.

Read more/less



On the dialog that appears, you can provide the details of the repeating sessions.



After specifying the first session date and time, you click **Repeats** and choose how often the session repeats. For example, if the session repeats on the same day every week, you'd pick **Weekly** as your **Repeats** option. For other examples, see Repeating session examples (below). If the sessions span multiple days, you can check the **Multi-day session** checkbox and specify the number of days over which the session takes place.

Finally, you indicate how many sessions make up the event by either specifying the total number of sessions in the **Ends** field or selecting an end date from the calendar control.

If you want the sessions you are adding here to replace any sessions already set up, check the **Replace all existing sessions** checkbox . If this option is unchecked, these sessions will be added to any existing ones.

Here is a complete list of the options appearing on the **Repeating sessions** dialog:

Option	Description
Starts on	The start date of the first session to be added.
Session time	The start and end time of the session(s) being added.
Multi-day session	If sessions span multiple days, check this box and specify the number of days over which the session takes place.
Repeats	Controls whether the sessions repeat daily, weekly, monthly, or annually.
Repeat every *x* days/weeks/months/years	Controls the number of days, weeks, months, or years between repeating sessions. For examples, sessions that take place every other week would be set to repeat every 2 weeks.
Repeat on	For reasons that repeat weekly, controls which weekdays the sessions repeat on.
Repeat by	For sessions that repeat monthly, controls whether the sessions take place on the same day of the month (e.g. October 15th) or the same day of the week (e.g. the third Thursday in October).
Ends	Controls whether the sessions end after a particular number of sessions have taken place, or on a particular date.
Replace all existing sessions	Controls whether the repeating sessions you are adding at the moment will replace the sessions already set up for this event, or will be added to the existing sessions.

Once you are finished specify the repeating session schedule, click the **Add** button.

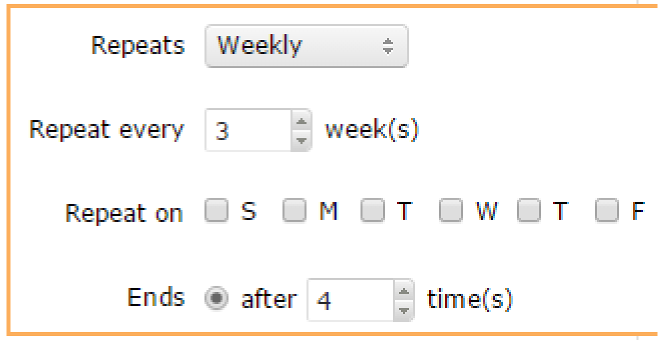
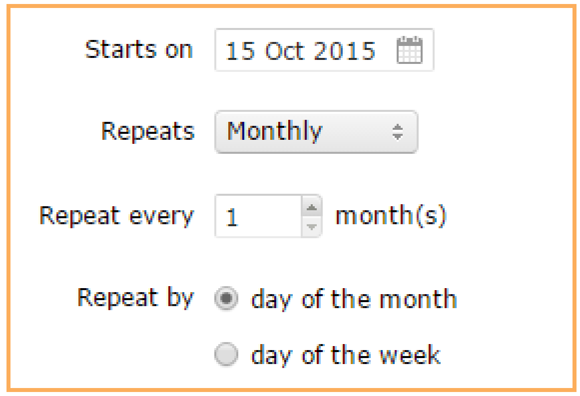
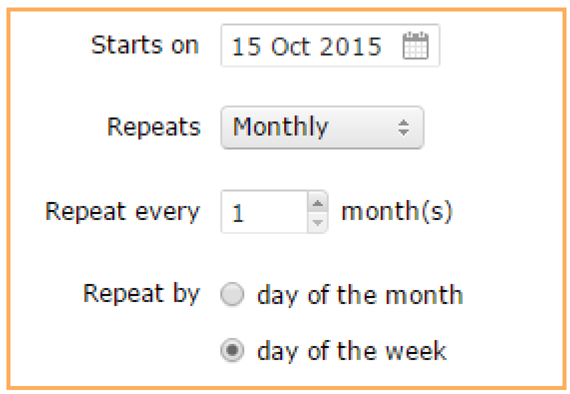
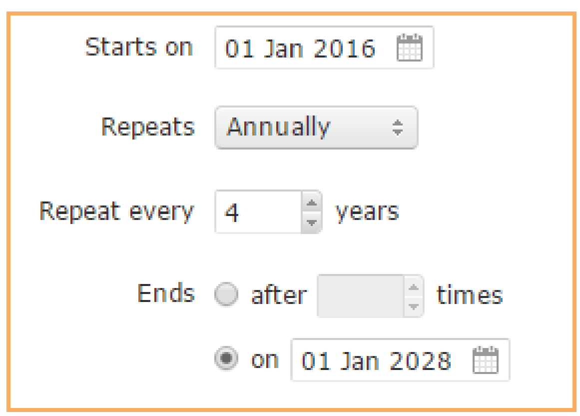
The sessions will now be listed within the **When and where** section of the event details.

After adding event sessions, you can modify or delete them, or add more.

Repeating session examples

Read more/less

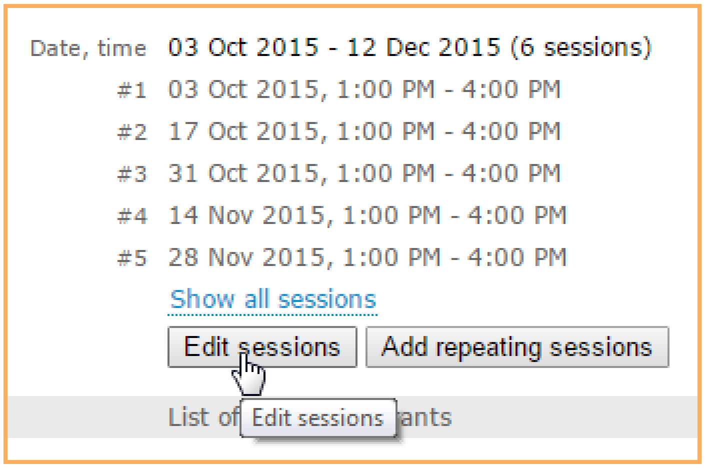
Example	Settings
Every other day for a total of 10 sessions	

Every third Saturday over a 12-week period	
Every month on the 15th	
Every month on the third Thursday	
Every 4 years on New Year's Eve until 2028	

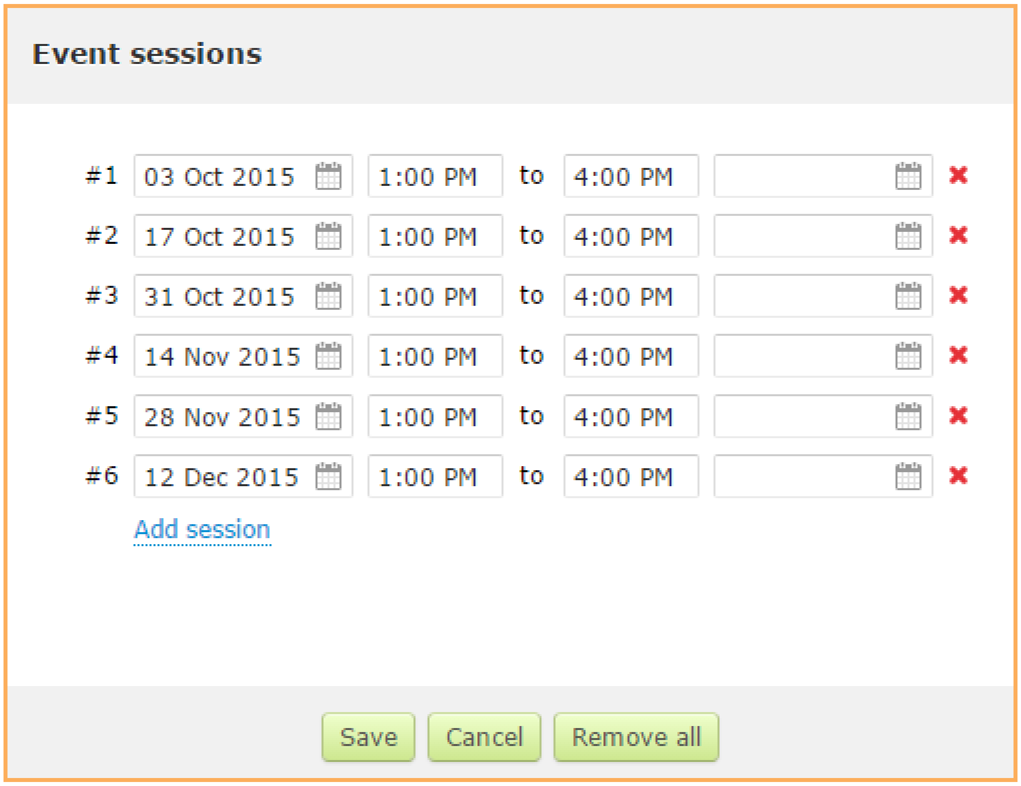
Modifying sessions

After you have added event sessions – whether manually or through the **Repeating sessions** dialog – you can modify and delete them, or add more. To modify event sessions, click the **Edit sessions** button within the **When and where** section of the event details.

Read more/less



From the dialog that appears, you can add, modify, and remove event sessions.



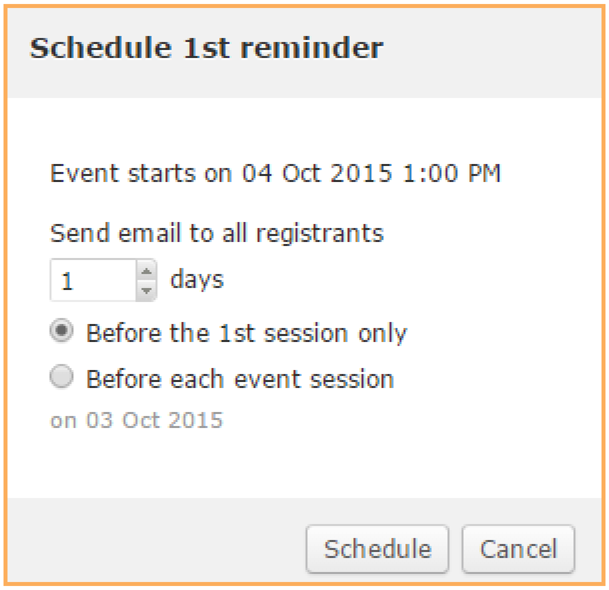
To add an event sessions, click the **Add session** button. To modify an event session, click within the box displaying the start or end date or time and enter a different value, or click the calendar control to select a date from the calendar.

To remove sessions, click the **X** button beside the sessions you want to remove, or click the **Remove all** button to remove all event sessions.

Scheduling emails for multi-session events

When scheduling reminders for multi-session events, the **Schedule** dialog allows you to choose whether to send before each event session, or just before the first session.

Read more/less



If the first session has already taken place, then the only option will be to send the reminder before each session.

Multi-session event email macros

The following macros be used in event emails for multi-session events:

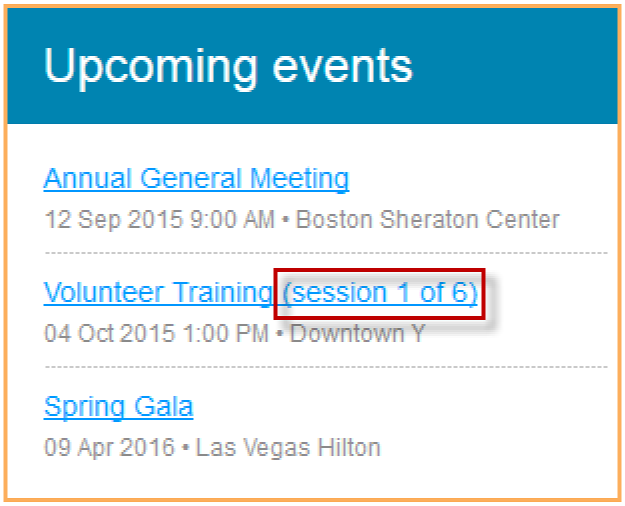
Read more/less

Macro	Description	Email type
Event_UpcomingSessionDate	The start date of the next upcoming session.	Reminder
Event_UpcomingSessionTime	The start time of the next upcoming session.	Reminder
Event_UpcomingSessionEndDate	The end date of the next upcoming session.	Reminder
Event_UpcomingSessionEndTime	The end time of the next upcoming session.	Reminder
Event_SessionsList	A list of all sessions (including past ones) using the following format: #1 <date range> #2 <date range> ...	all

How multi-session events appear to the public

Within an upcoming events gadget, each session will be displayed separately, with the session number automatically appended to the event name.

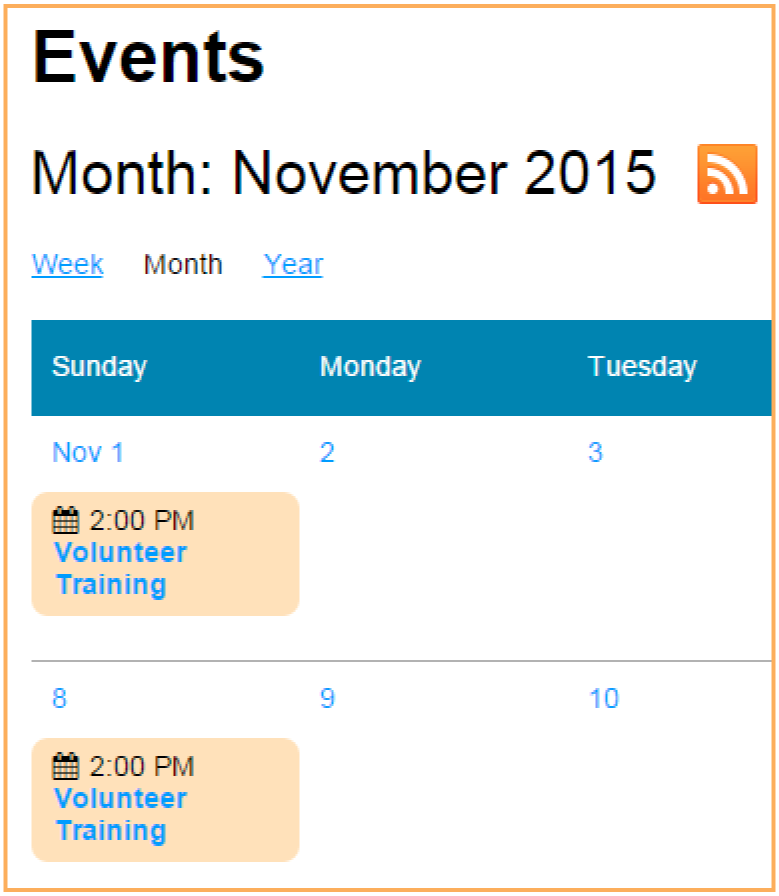
Read more/less



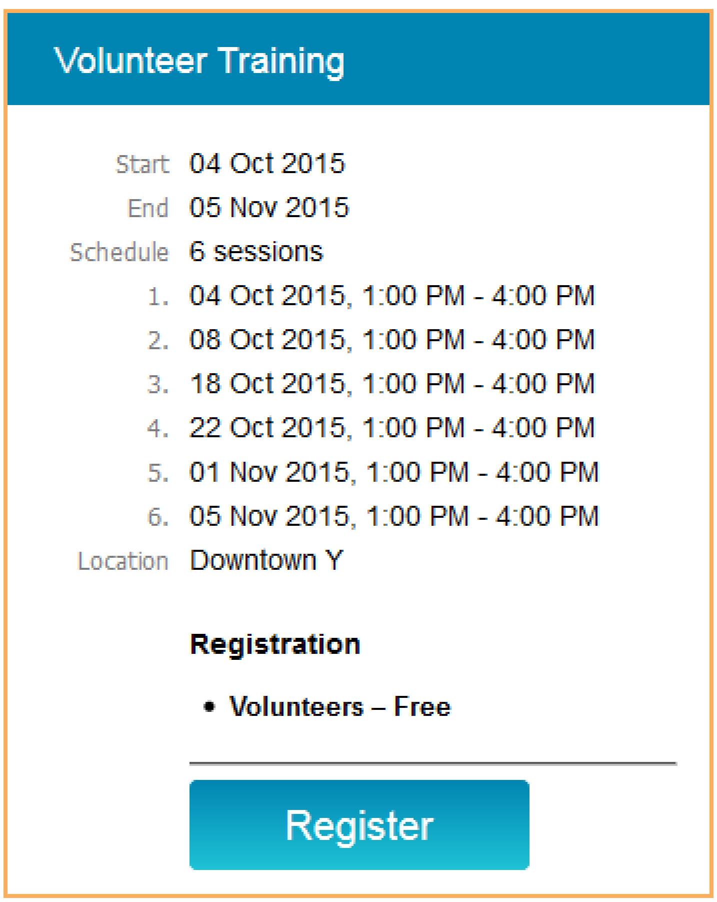
If you want, you can hide the session number within the upcoming events gadget.

Within event calendars, the summary of multi-session events will include the number of sessions.

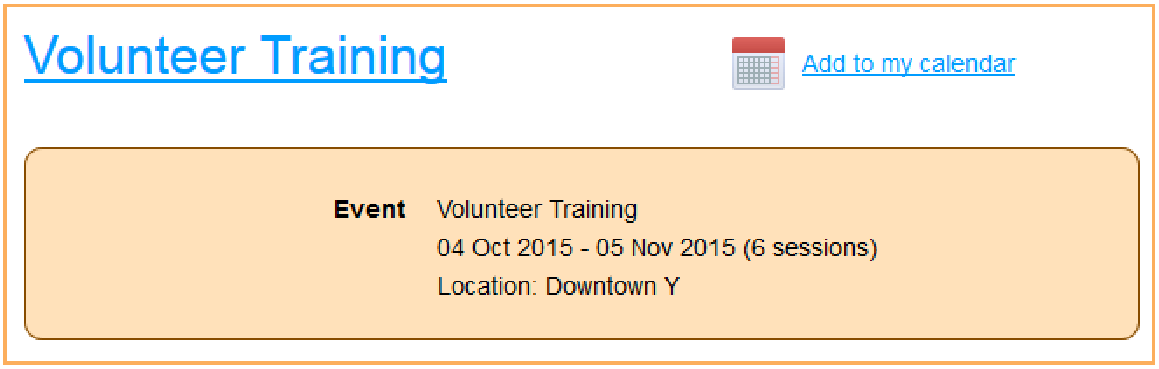
Within calendar view, individual sessions will appear separately.



Within the event details, the entire session schedule will be displayed.

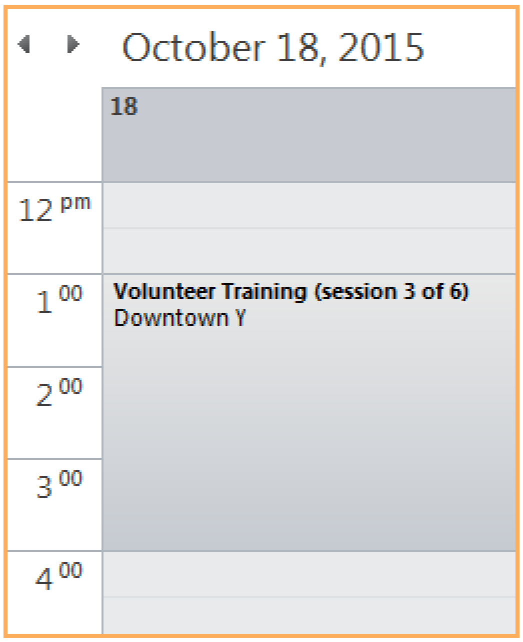


When a visitor clicks the **Register** button to register for the event, the event summary that appears on various registration screens will include the number of sessions, as well as the start and end dates.



Visitors register once for all event sessions. They cannot pick and choose which sessions they want to register for.

When exporting the event to an external calendar program, each session will appear separately, with the session number and the total number of sessions automatically added to the event name.



Hiding the session number within upcoming events gadgets

Within an upcoming events gadget, the session number is automatically appended to the event name. To remove the session number, follow these steps:

Read more/less

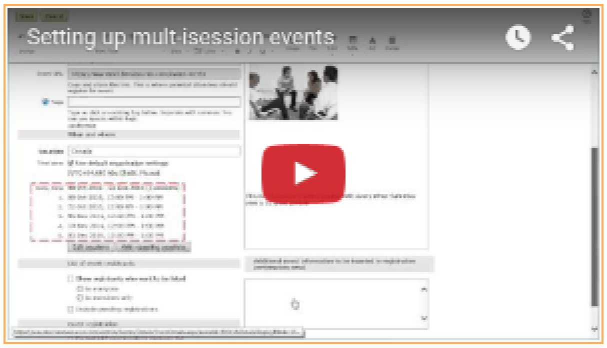
1. Go to **Settings** then click **Global JavaScript** (under **Site settings**).
2. On the **Global JavaScript** screen that appears, copy and paste the following code:

```
<script type="text/javascript">
$(function()
{
if( $('.WaGadgetUpcomingEvents').size() )
{
$('.WaGadgetUpcomingEvents a:contains("(session")').each(function()
{ var text = $(this).html(); var newText =
text.replace(/(\s+\(session[\w\s]+\))/, ""); $(this).html(newText); }
);
}
});
</script>
```

3. Click **Save**.

Checking in attendees at multi-session events

Currently, checking in attendees takes place at the event level, so attendees cannot be checked in for individual sessions.



Setting up multi-session events (4:16)

On this page:

Expand all sections

Event visibility

Event visibility

When you set up an event, you can restrict the visibility of the event by membership level, member groups, or limit access to administrators only. Restricted events will only appear on an event calendar for members whose membership level has been granted access.

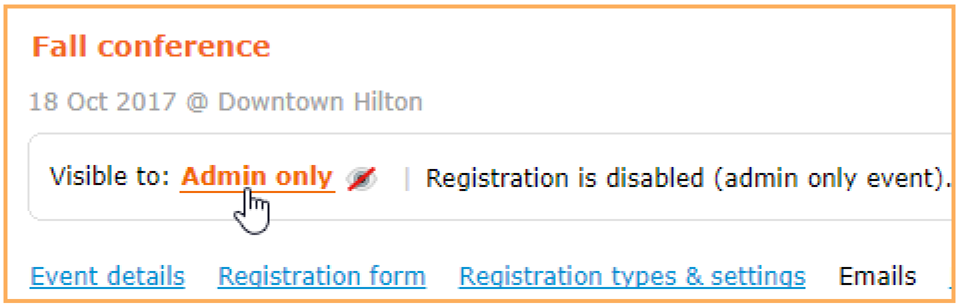
You might want to restrict access to your event while you are setting it up, or you might want it to remain restricted to administrators so you can control and approve registrations individually. If you want to offer a preview of an upcoming event, you can make the event accessible without enabling registration.

When you create an event, it will initially be restricted to administrators but with registration disabled.

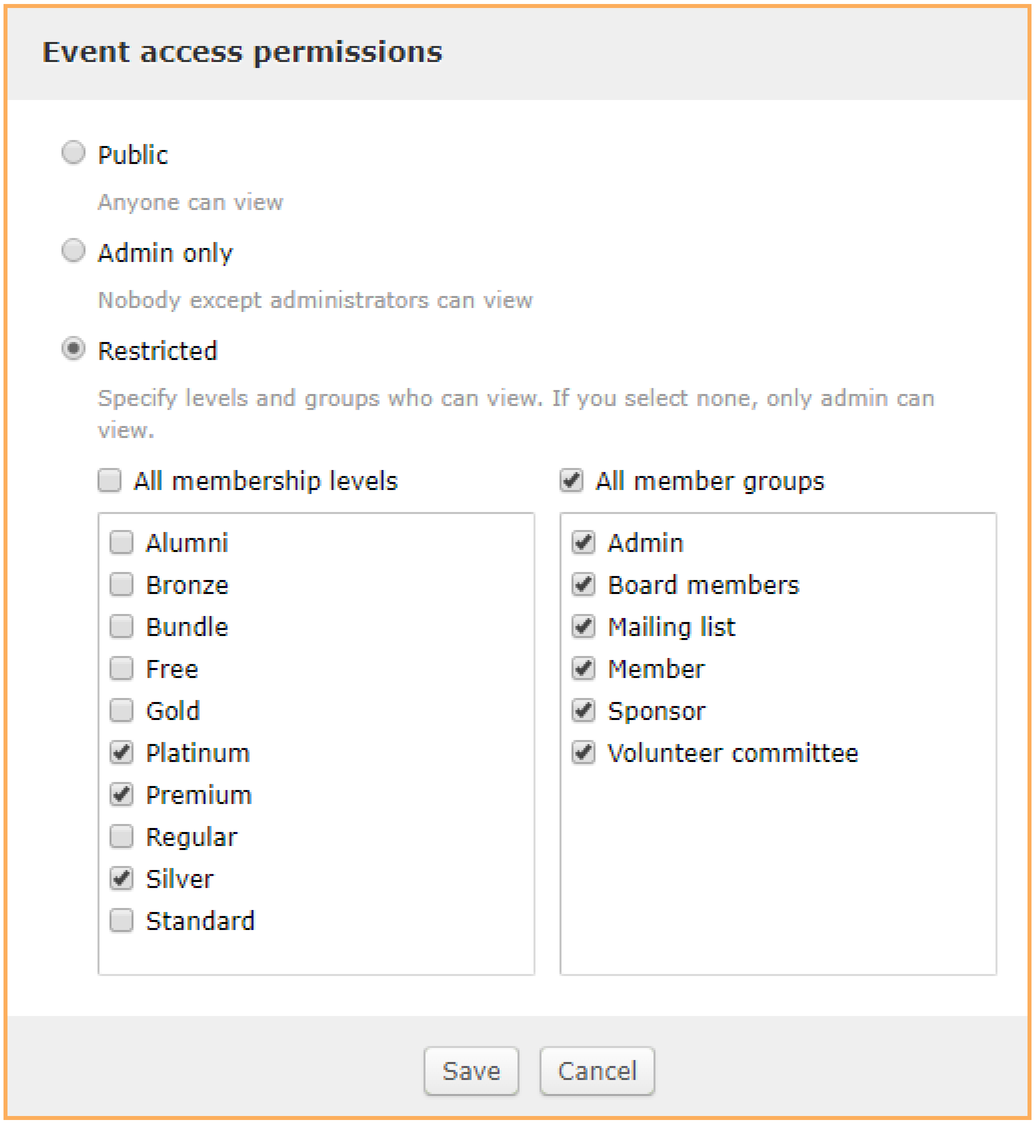
> You can also filter event calendars by event tags, restrict access to individual registration types by membership level, and restrict access to the page on which the event calendar appears by membership levels, members groups, or administrators only.

To control event visibility, follow these steps:

1. Hover over the **Events** menu and select the **Event list** option.
2. Select the event within the list.
3. Within the event details, click the **Edit** button to enter edit mode.
4. Click the link beside the **Visible to** heading displaying the current access level – **Admin only**, **Public**, or **Restricted levels/groups**.



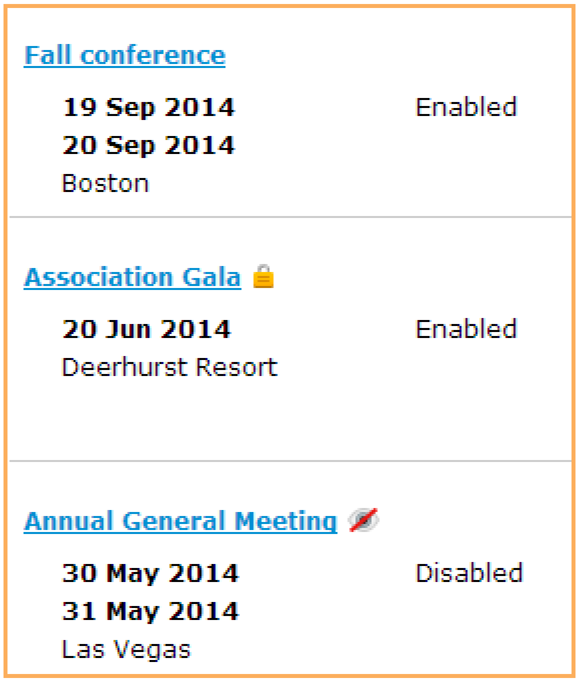
5. Within the dialog that appears, click the appropriate access option.
6. If you select the **Restricted** option, check each of the membership levels or member groups you want to be able to see the event.



If you restrict access by both membership levels and membership groups, then members who belong to any of the selected levels **or** groups will be able to view the event. If you check the **All levels** or **All groups** option then all levels or groups – including any levels or groups added in the future – will be selected.

7. Click **Save** to save your choice.
8. Click **Save** to save the changes to your event.

Within your events list, restricted events are flagged by a lock icon, and admin-only events are indicated by a crossed-out eye.



Troubleshooting

My event is not appearing in my event calendar

- Check the event access setting. If it's currently set to *Admin only*, change it to *Public* or *Restricted* (if you want to restrict access by membership levels and/or member groups).
- Check the settings for your event calendar. They might be set to filter the event calendar by event tag.

Capping event registrations

Capping event registrations

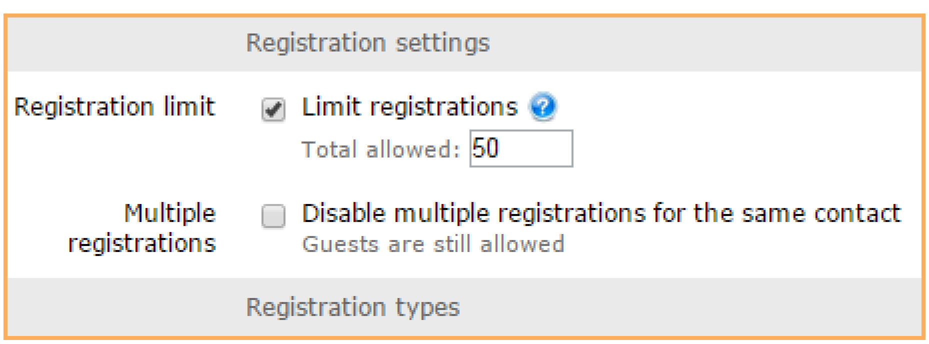
If you have events with limited space, you can choose to cap your event to a specific number of registrants (including guests). You can limit the number of registrants for the entire event, or for individual registration types . When the registration limit is reached, registration will be automatically disabled for the event or the registration type, and the event organizer will receive an email notification.

SHOW ME (2:57)

Once you set a registration limit for an event or registration type, you can enable an event waitlist.

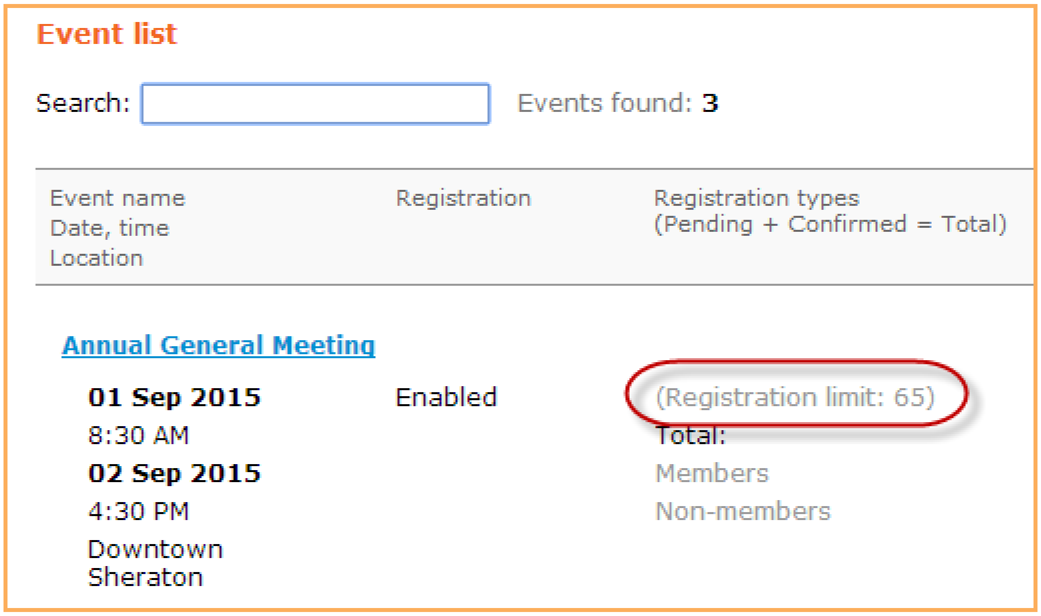
Setting a registration limit for the event

You can limit registration for the entire event on the event details page when you add or modify an event. To do so, click the **Registration type & settings** tab, then check the **Limit registrations** check box and enter the registration limit.

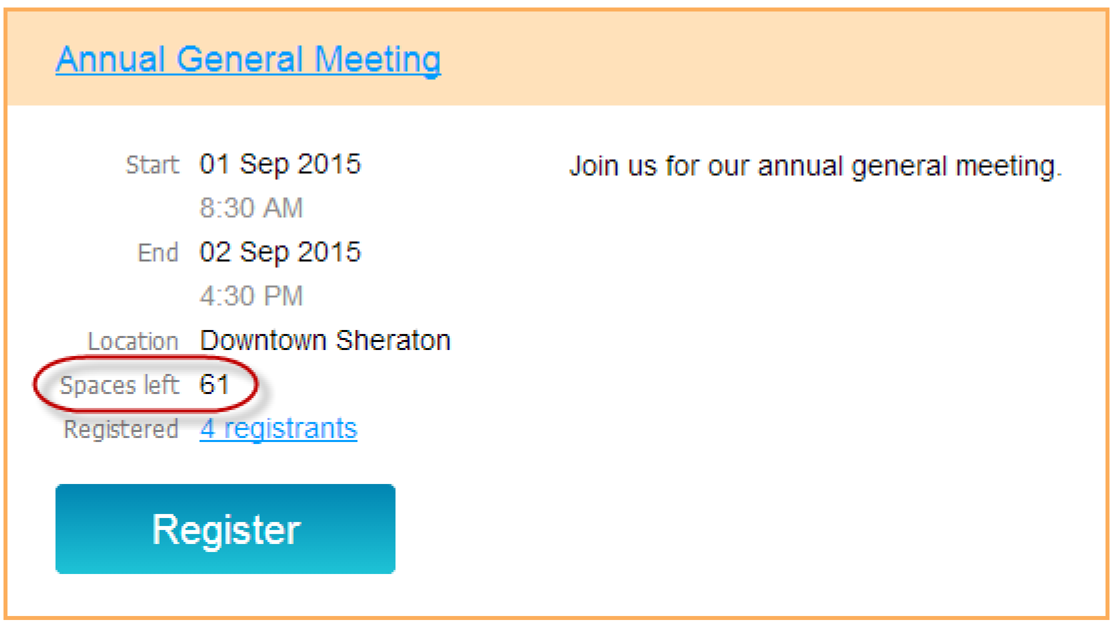


Viewing the event registration limit

The overall event limit will be displayed within your events list in admin view.

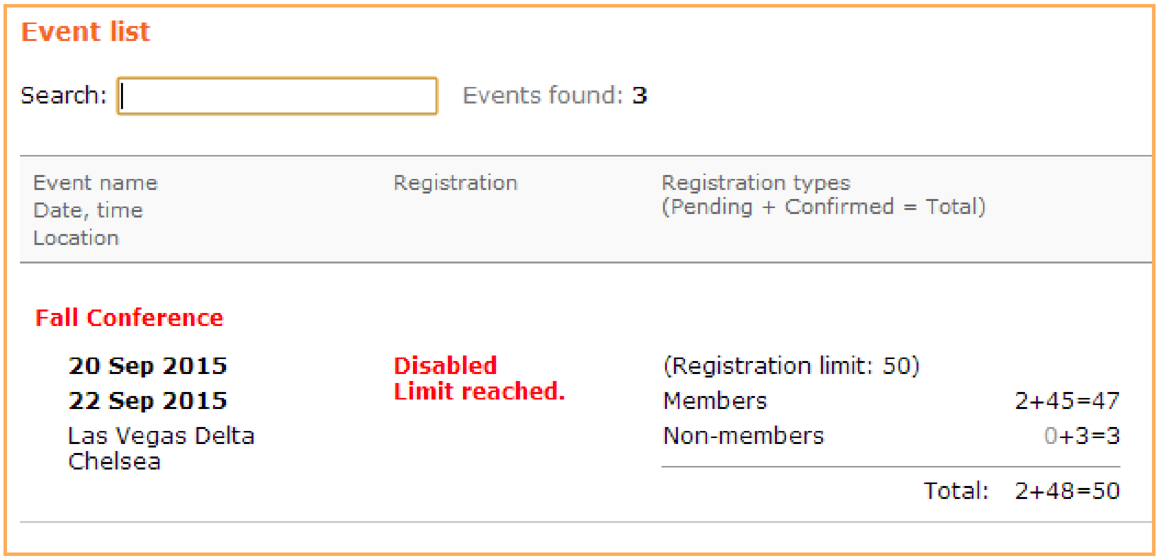


On your event calendar page, visitors will see the number of spaces left.

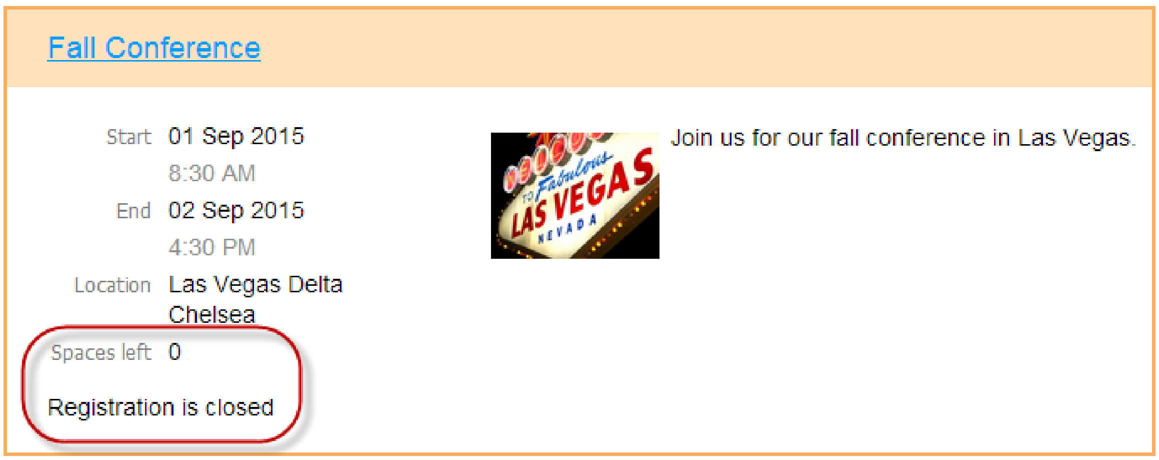


Reaching the event registration limit

After the event registration limit is reached, the registration will be closed and an email will be sent to the event organizer. On your event list, a message will be displayed in red.



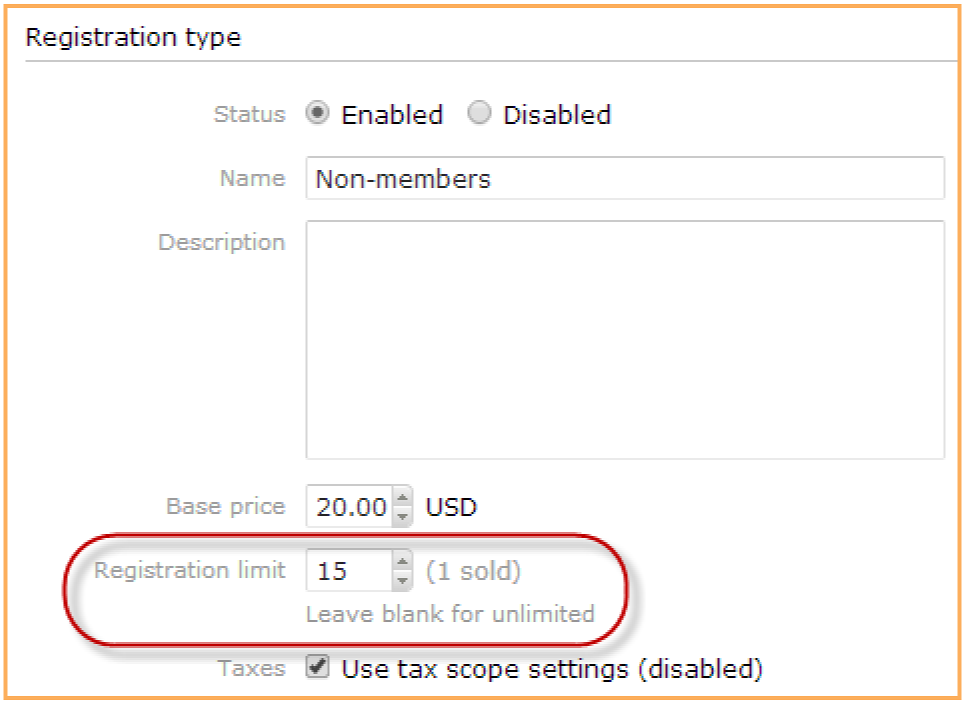
On your event calendar page, visitors will see that the event is closed for registration, and that there are no spaces left.



⚠ After the registration limit is reached, administrators can still register additional attendees manually.

Setting a registration limit for a registration type

You can set a limit registration for each registration type, separately or in addition to an overall event registration limit. While modifying a registration type, enter the limit in the **Registration limit** field.



Viewing the registration type limit

The registration type limits are displayed on the registration type list, along with the number of registrations sold for each type.

Reaching the registration type limit

When a registration type limit is reached, a **Sold out** message for that type appears within the registration type list, and the event organizer will be sent an email notification.

On the event calendar page, the sold-out registration type will no longer appear as a registration option.

Registration will continue to be open for other registration types.

Hiding the number of spaces left

You can hide the number of spaces left on the event calendar page, and on the Choose registration type screen.

Hiding the number of spaces on the event calendar page

To hide the number of spaces left on the event calendar page, add the following code to the CSS customization screen:

```
.eventRegistrationInfoSpacesLeft,
.eventInfoSpacesLeft {display: none;}
```

Hiding the number of spaces on the registration type screen

To hide the number of spaces left on the Choose registration type screen, add the following code to the CSS customization screen:

```
#idSectionEventRegistrationTypeSelectorContainer div[id*="spaceLimitContainer"] {
    display: none;
}
```

On this page:

Event waitlists

Event waitlists

Once an event reaches its registration limit – either for a particular registration type or for the event as a whole – you can set up a waiting list of prospective event registrants.

Enabling the waitlist

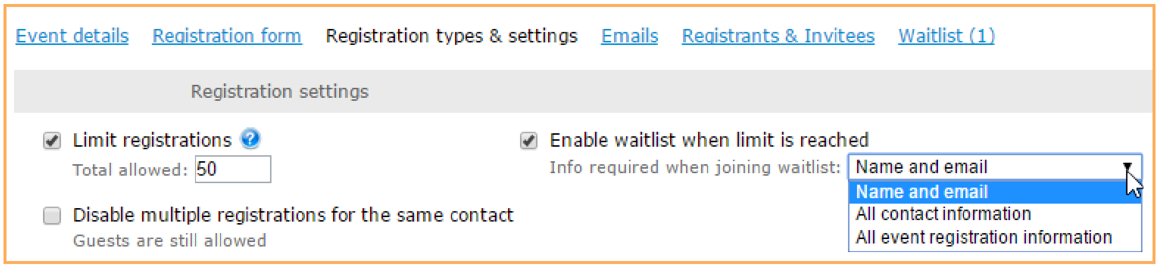
After you set a registration limit for an event, a waitlist option becomes available. You can enable a waitlist separately for each registration type and for the overall event.

Enabling the waitlist for the entire event

To enable a waitlist for the entire event, follow these steps:

Read more/less

1. Go to the **Registration types & settings** tab for the event.
2. Click the **Edit** button to enter edit mode.
3. Make sure that the **Limit registrations** option is checked and a registration limit has been entered in the **Total allowed** field.
4. Check the **Enable waitlist when limit is reached** option.
5. Click the drop-down list and choose how much information to collect from people wanting to join the waitlist.



6. Click **Save** at the top of the screen to save your changes.

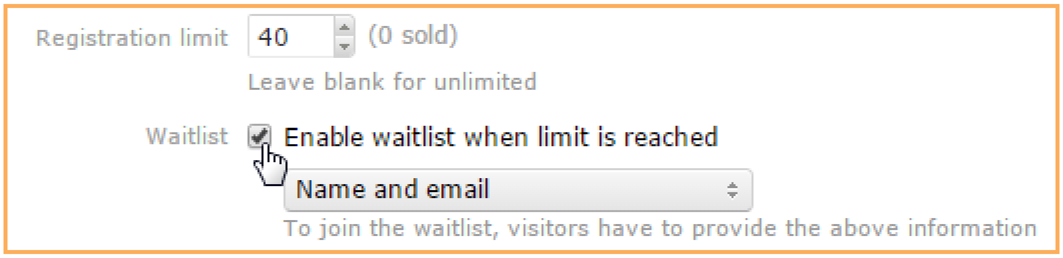
If you have registration limits for all registration types, and you don't enable waitlists for any of the registration types, then a waitlist will not be available even if you enable it at the event level.

Enabling the waitlist for a registration type

To enable a waitlist for a particular registration type, follow these steps:

Read more/less

1. Go to th e **Registration types & settings** tab for the event.
2. If you are in edit mode, click the **Save** button at the top of the screen to save your changes and exit edit mode.
3. Within the list of registration types, click the registration type you want to enable the waitlist for.
4. Within the registration type settings, m ake sure that a registration limit has been entered .
5. Che ck the **Enable waitlist when limit is reached** option.

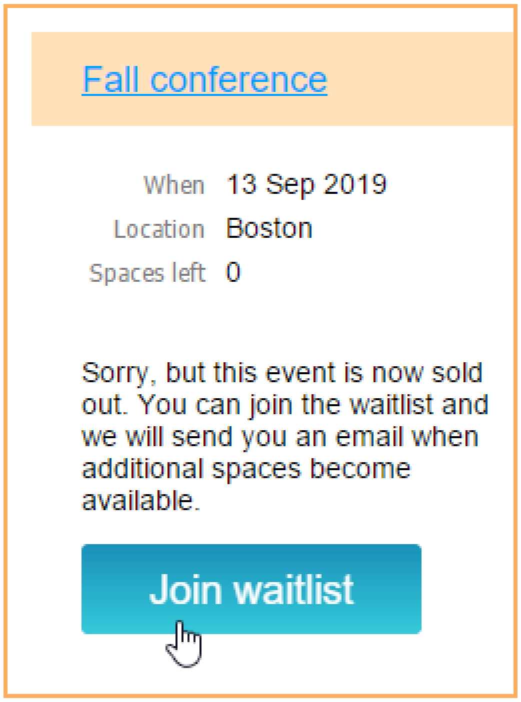


6. Click the **Waitlist** drop-down and choose how much information to collect from people wanting to join the waitlist.
7. Click the **Save** button to save your changes.

Joining the waitlist

When the waitlist is enabled and the registration limit is reached, an option appears within the event details on your public site to join the waitlist.

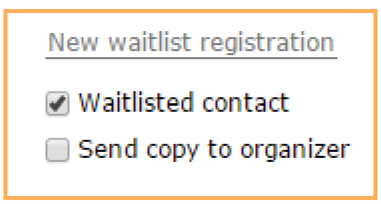
Read more/less



When the prospective registrant clicks the **Join waitlist** button, they will be prompted to choose a registration type, and to provide the information you specified.

After providing the information, the prospective registrant clicks another **Join waitlist** button and is added to the waitlist. Once on the waitlist, the prospective registrant will not receive any further announcements for this event.

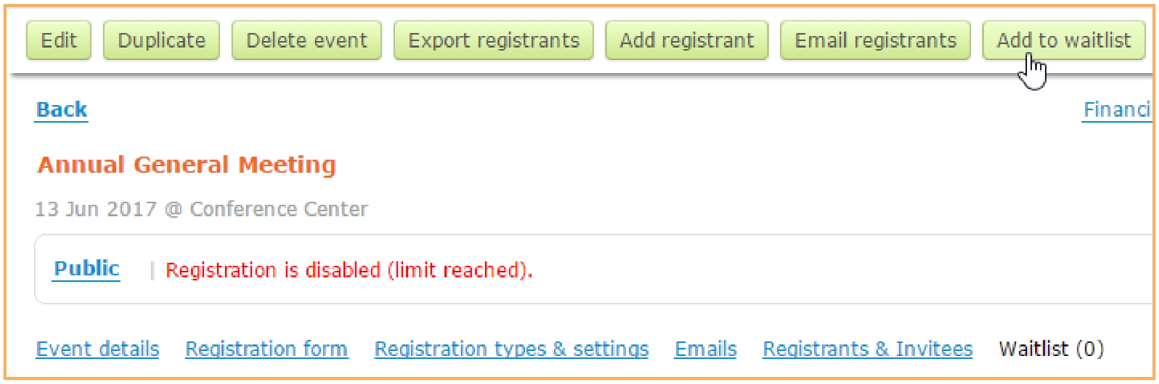
From the event's emails settings, you can choose to send a waitlist confirmation message to the prospective registrant, and a copy to the event organizer.



Adding to a waitlist

Administrators can manually add a contact to the event waitlist. When the waitlist is enabled, you can click the **Add to waitlist** button from the **Waitlist** tab to select a contact to be added to the waitlist.

Read more/less



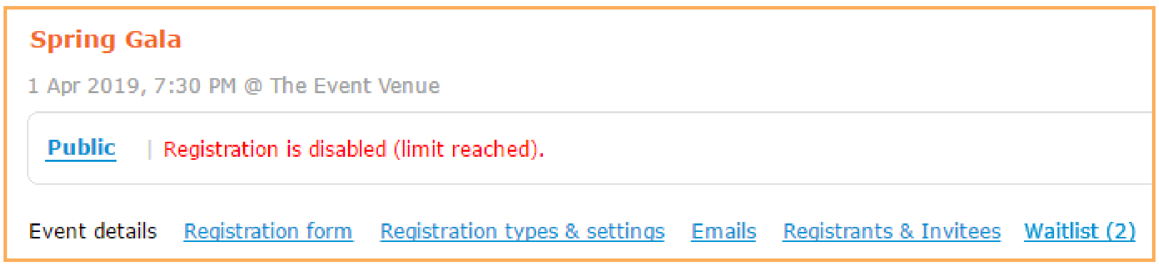
After you chose the contact to be added, you choose the registration type and provide the required information for the contact.

Once you save your changes, a waitlist registration is created for the contact you chose. Once on the waitlist, the contact will not receive any further announcements for this event.

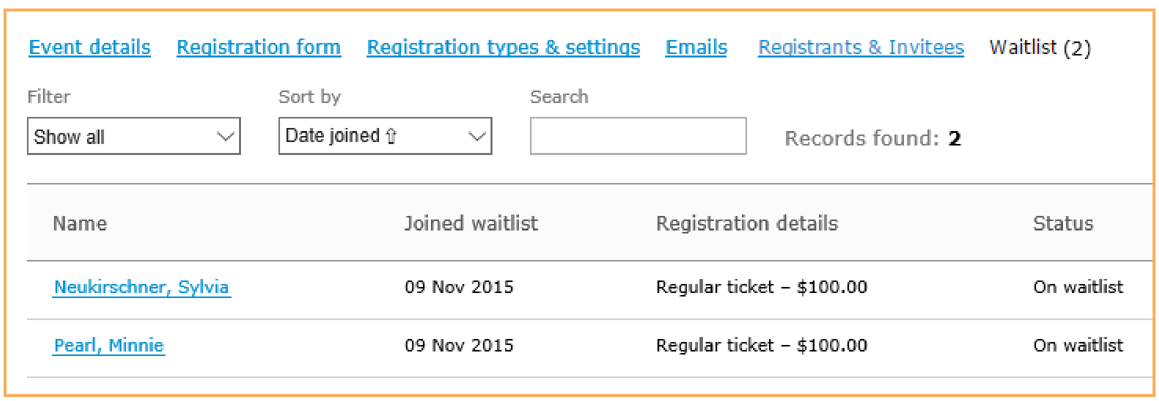
Working with the waitlist

Once a waitlist is enabled for an event, a **Waitlist** tab appears beside the **Registrants & invitees** tab.

Read more/less

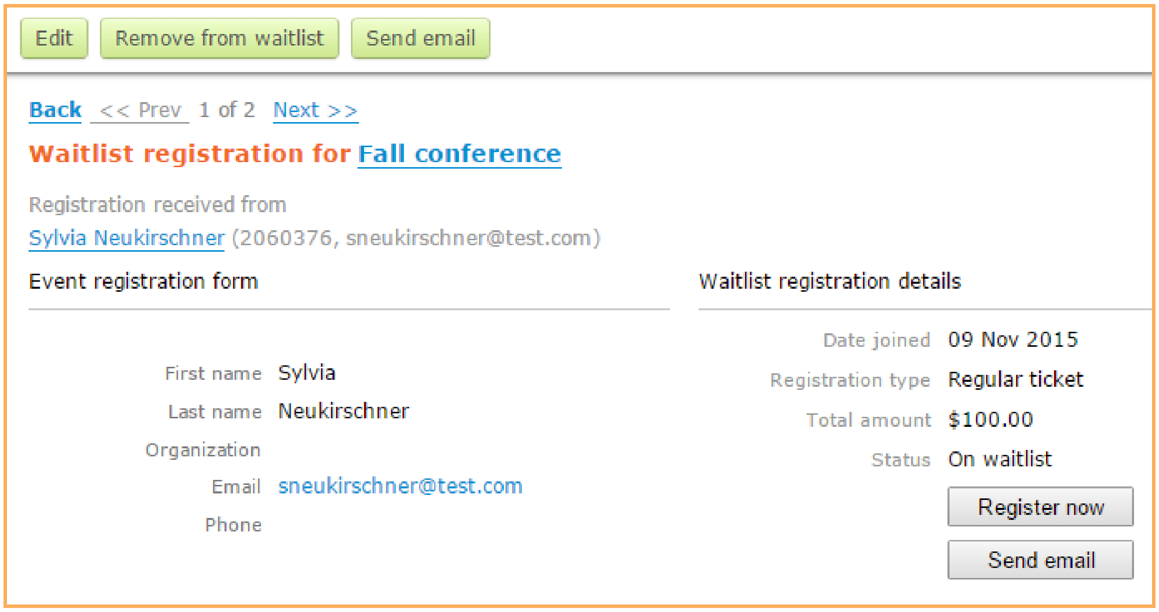


The Waitlist tab displays registration information for everyone on the waitlist.



The waitlist does not distinguish between contacts waiting for spaces within a particular registration type, and those waiting for overall event spaces.

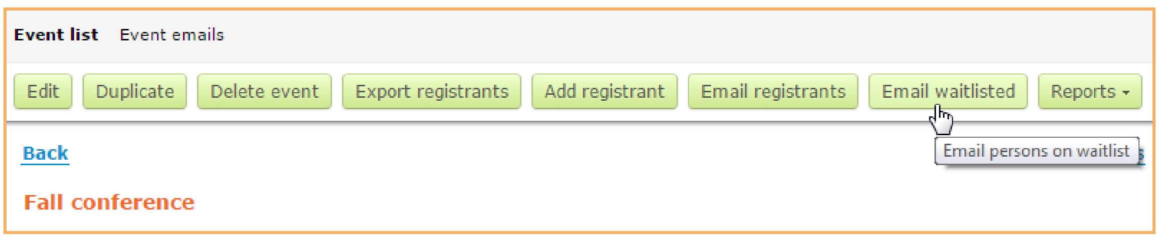
Within the **Waitlist** tab, you can click an entry to view the details of a particular waitlist registration.



From the waitlist registration record, an administrator can register the contact for the event, send an email to the contact, or remove the contact from the waitlist.

Contacts cannot remove themselves from waitlists.

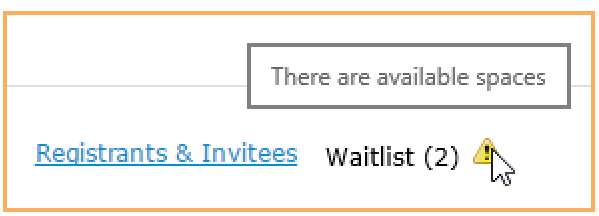
Administrators can email the entire waitlist from any tab on the event setup screen by clicking the **Email waitlisted** button.



Getting off the waitlist

If spaces become available for an event or registration type with a waitlist, a warning icon will appear on the **Waitlist** tab. When you hover over the icon, a message will appear informing you of the additional spaces.

Read more/less



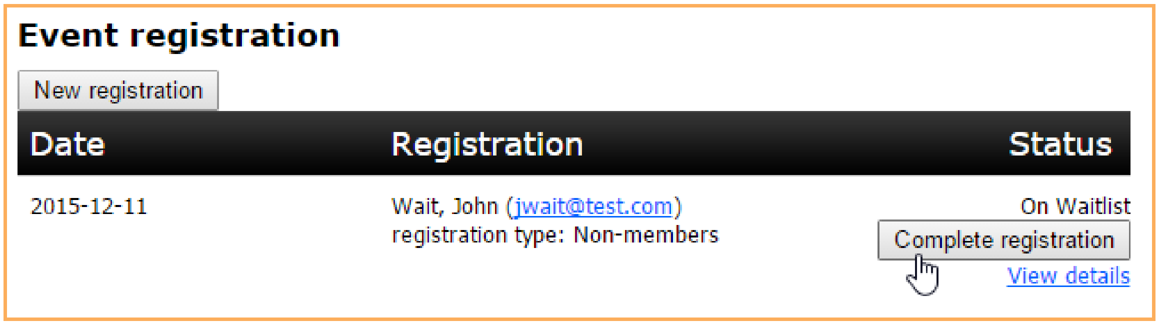
Automatic emails are **not** sent to either contacts on the waitlist or administrators when spaces become available.

Once spaces become available, there are two ways an administrator can get a contact off the waitlist and onto the registrant list:

- an administrator can manually register the contact by clicking the **Register now** button from the contact's waitlist registration record. To display a waitlist registration record for a contact, go to the **Waitlist** tab for the event, then click the contact within the list.

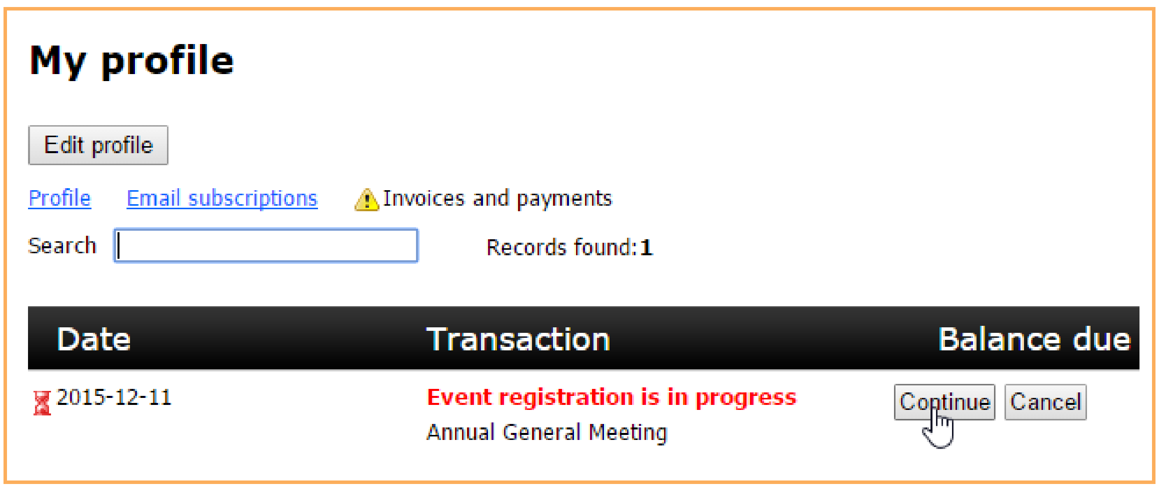
  If an administrator registers a contact for an event, the contact is automatically removed from the waitlist, but they are not automatically emailed an event confirmation. As with all manual event registrations, it is the responsibility of the administrator to send a manual confirmation message.

- an administrator can manually email the contact and invite them to visit the event details page and click the **Register** button to register for the event. After clicking the **Register** button, they click the **Complete registration** button on the event registration screen.

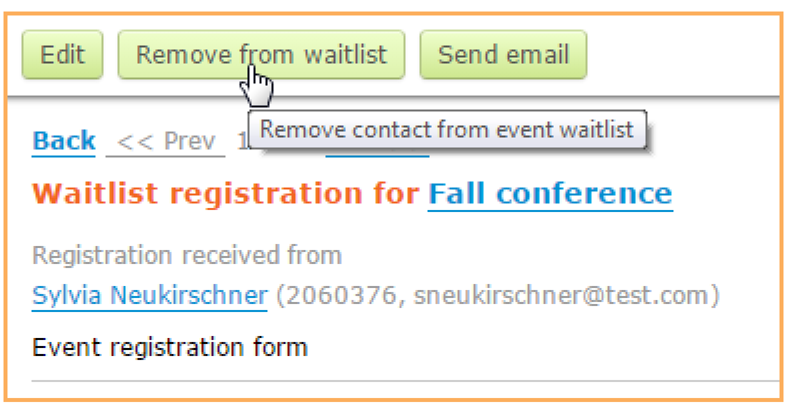


The email to the contact on the waitlist can include the event URL – which appears on the event details tab within the event setup screen – so that the contact can jump right to the event details on the public site.

Contacts on a waitlist can also complete their registration from within their profiles. On the **Invoices and payments** tab, they can click the **Continue** button to complete the registration for the event, or click Cancel to cancel the registration and remove themselves from the waitlist.



Administrators can remove a contact from a waitlist without registering them by displaying their waitlist registration record and clicking the **Remove from waitlist** button.



Being on a waitlist does not guarantee the contact the next available space at the event. When a space becomes available, it also appears available on the public event calendar and event details so that anyone can snap it up.

Video: Event waitlists (4:13)

On this page:

Expand all sections

See also:

- Capping event registrations

Event tags

Event tags

You can categorize events using event tags – aka event labels. You can assign an unlimited number of tags to each event and use these tags to group similar events.

What you can do with tags

- You can filter the events list in admin view by entering one or more event tags in the **Search** field.
- You can limit event calendars to listing only events with certain event tags. This allows you to create separate event calendars for each type of event.
- You can limit upcoming events gadgets to listing only events with certain event tags.
- You can color code different types of events on the calendar view of your event calendar using event tags

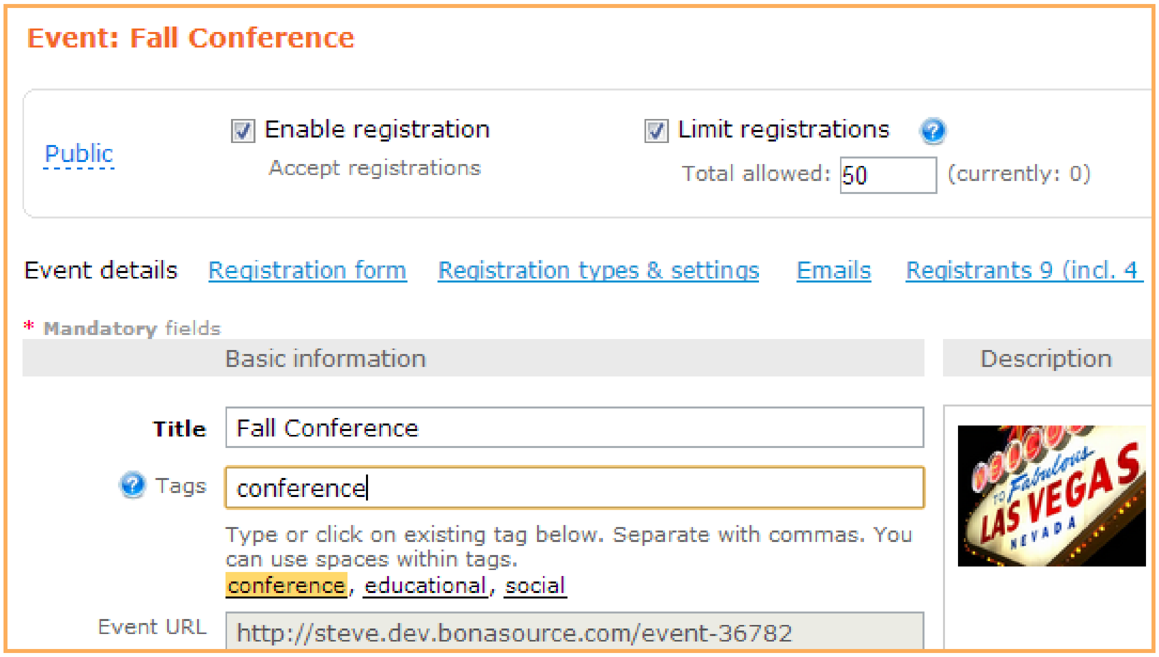
What you can't do with tags

- You cannot use the site search gadget to search for events by event tag.
- Event tags are not searched by Google and do not affect your site's Google rankings.

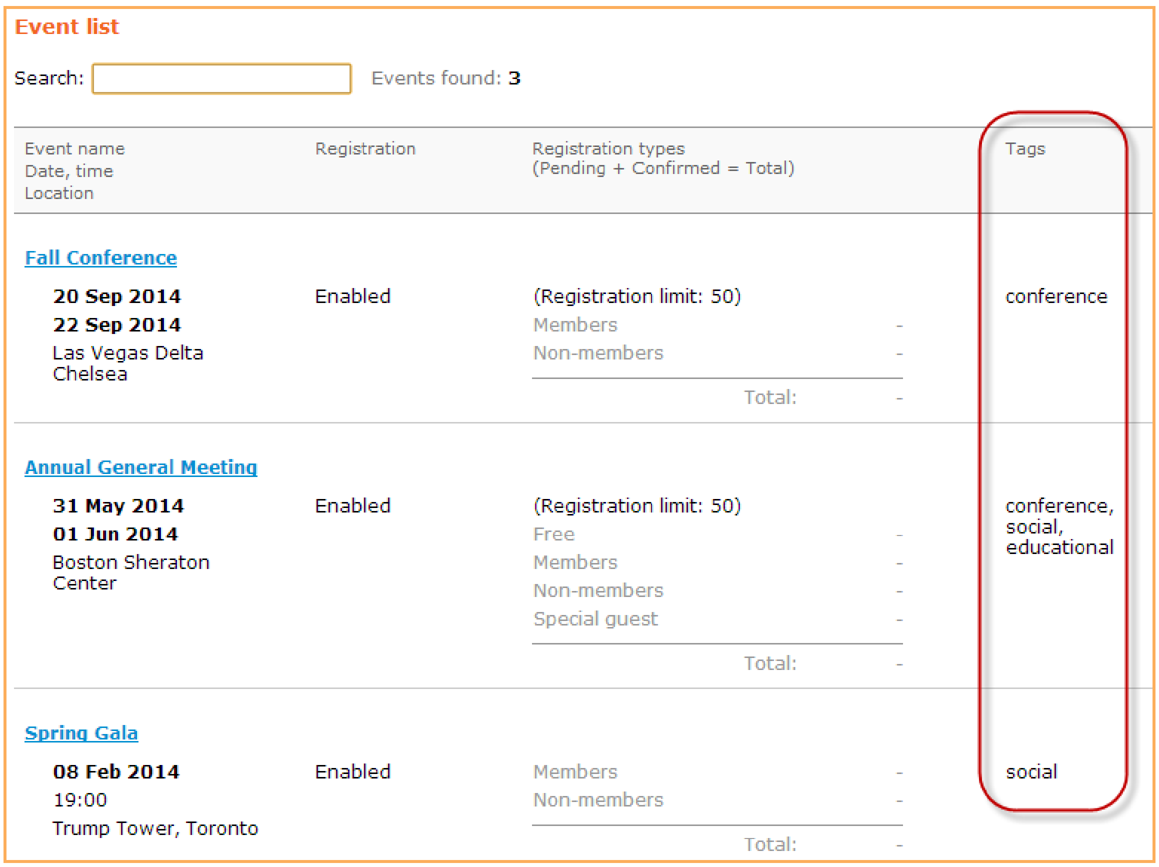
Adding tags

You can assign tags to events on the event details page when you add or modify an event.

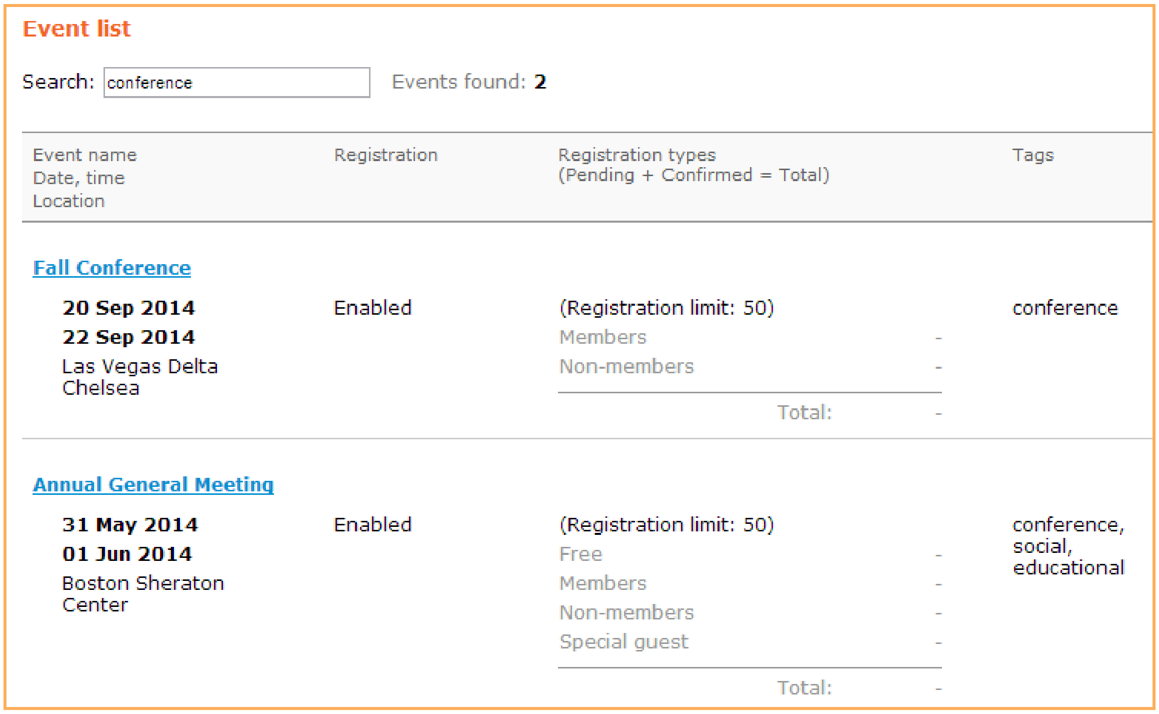
Read more/less



Tags are displayed on the event list in admin view.



You can quickly filter the list by typing a tag in the search field.



Removing tags

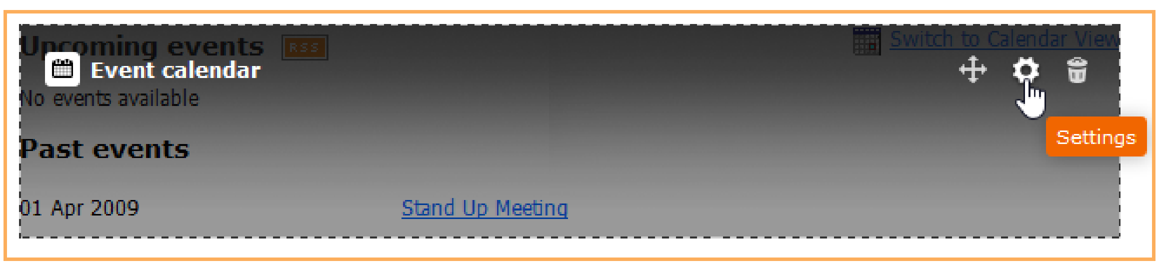
You can remove a tag for a particular event by going into edit mode and removing it from the **Tag** field. If you want to remove the tag completely, so it does not show up on your tag list (a tag might be no longer used or misspelled), you have to go into every event that has this tag assigned and remove it one by one.

Filtering event calendars using tags

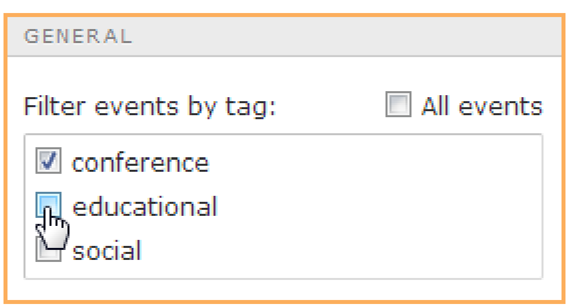
To filter an event calendar, so that it displays only events with certain event tags, follow these steps:

Read more/less

1. Click **Sites pages** under the **Website** menu and begin editing the site page where the event calendar appears.
2. Hover your pointer over the event calendar gadget and click the **Settings** icon.



3. Within the gadget settings panel on the left, check the tags you want to filter by.



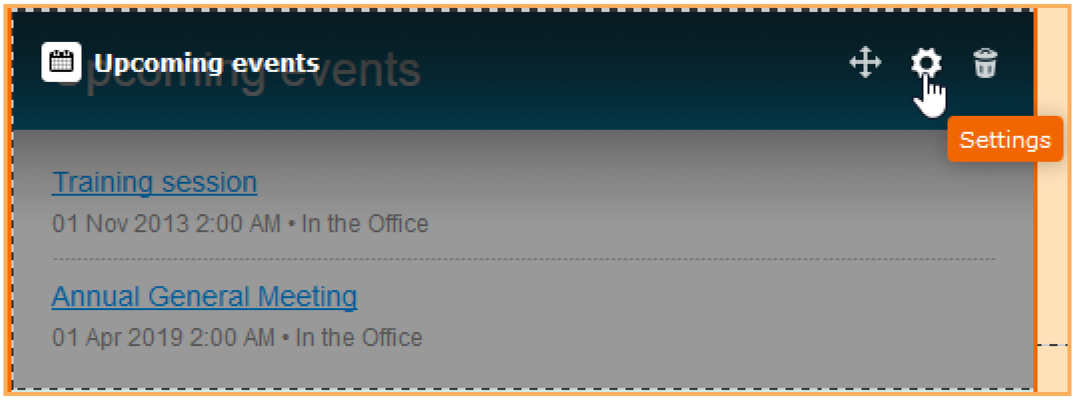
4. Click **Save** to save the changes to the page.

Filtering upcoming events gadgets using tags

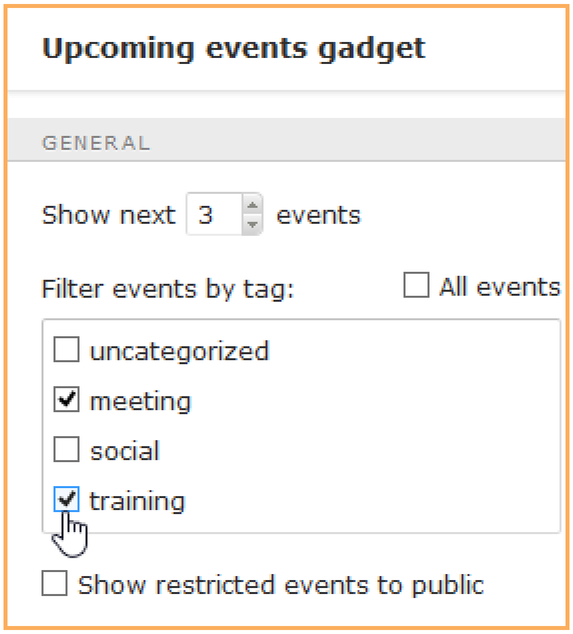
To filter an upcoming event gadget, so that it displays only events with certain event tags, follow these steps:

Read more/less

1. Click **Sites pages** under the **Website** menu and begin editing the site page where the upcoming events gadget appears.
2. Hover your pointer over the upcoming events gadget and click the **Settings** icon.



3. Within the gadget settings panel on the left, check the tags you want to filter by.

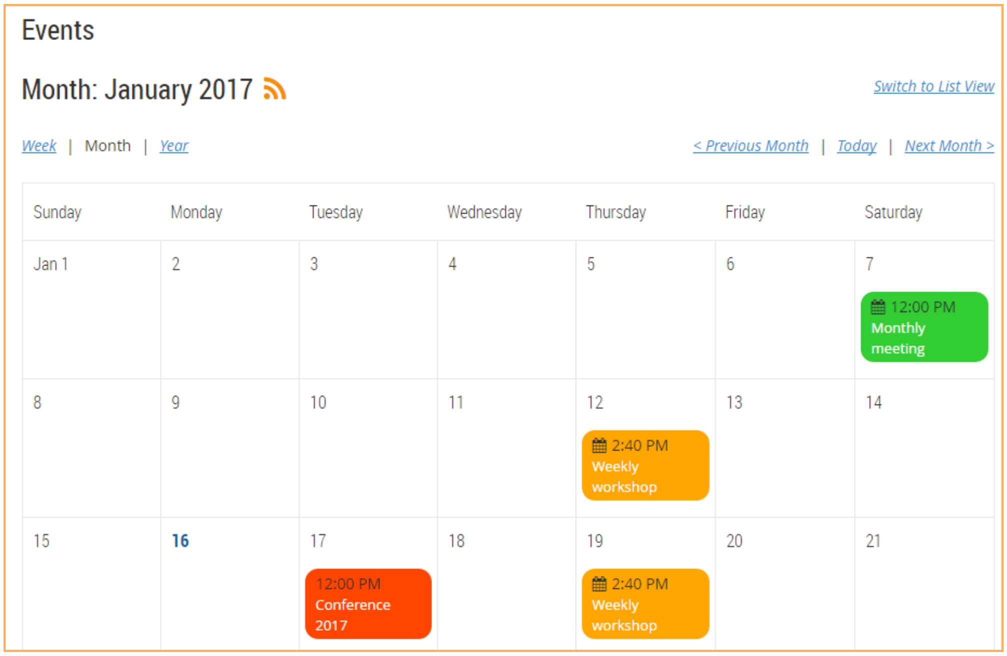


4. Click **Save** to save the changes to the page.

Color coding events using event tags

You can use event tags to color code different types of events on the calendar view of your event calendar.

Read more/less



To color code events on your event calendar, follow these steps:

1. Begin editing the site page on which your event calendar appears.
2. Add a custom HTML gadget directly below your event calendar gadget.
3. Add the following code to the custom HTML gadget.

```
<script>
// change color only on monthly view
if ($(".monthButtonLabel").length >0){
// add your tags and related colors using JavaScript function examples
below
  setEventBackground("workshop", "orange");
  setEventBackground("meeting", "LimeGreen");
  setEventBackground("conference", "#FF4500"); // another way to set color:
OrangeRed
}
function setEventBackground(tagName, bgcolor){
    $( "a[data-tags*='" + tagName + "']").parent().css("background-color",
bgcolor)
  .parent().find(".eventTime").parent().css("background-color", bgcolor);
}
</script>
```

4. Modify the setEventBackground elements within the code, changing the event tags (workshop, meeting, conference) to match the event tags you use, and changing the background colors to the colors you want to use (using either color names or hex codes). You can add or remove setEventBackground elements if necessary.
5. Save the changes to your code.
6. Save the changes to the page.

On this page:

Expand all sections

Customize event registration form

Customizing event registration forms

Wild Apricot allows you to customize the fields appearing on the registration form for each event. For example, you might want the registration form for your monthly seminars to collect different information than the registration form for your annual convention. You can add event-specific fields to collect information such as seating or meal choice, and even up-sell some extra options to your registrants. You can also choose which common fields appear on the registration form.

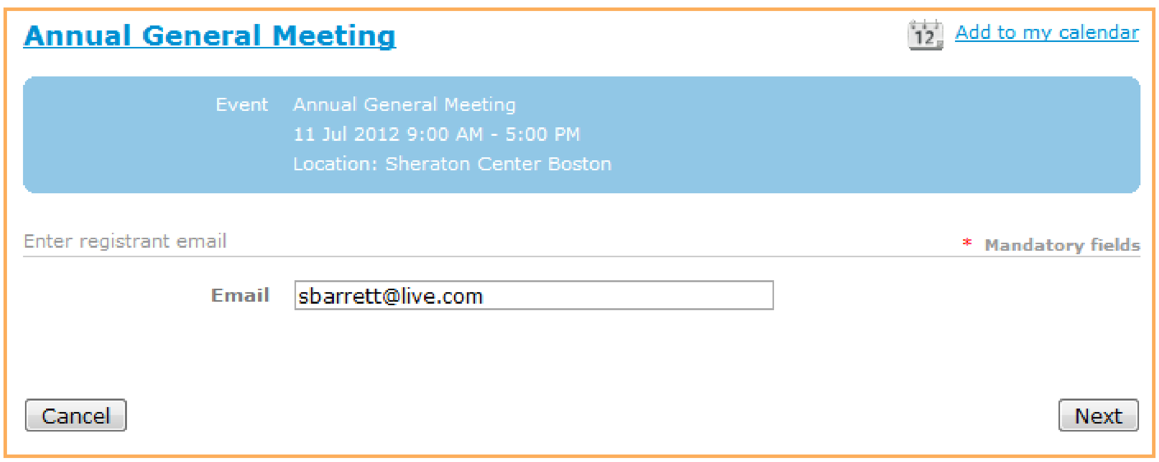
You can customize the appearance of the event registration form by modifying the event registration system page.

Using an event registration form

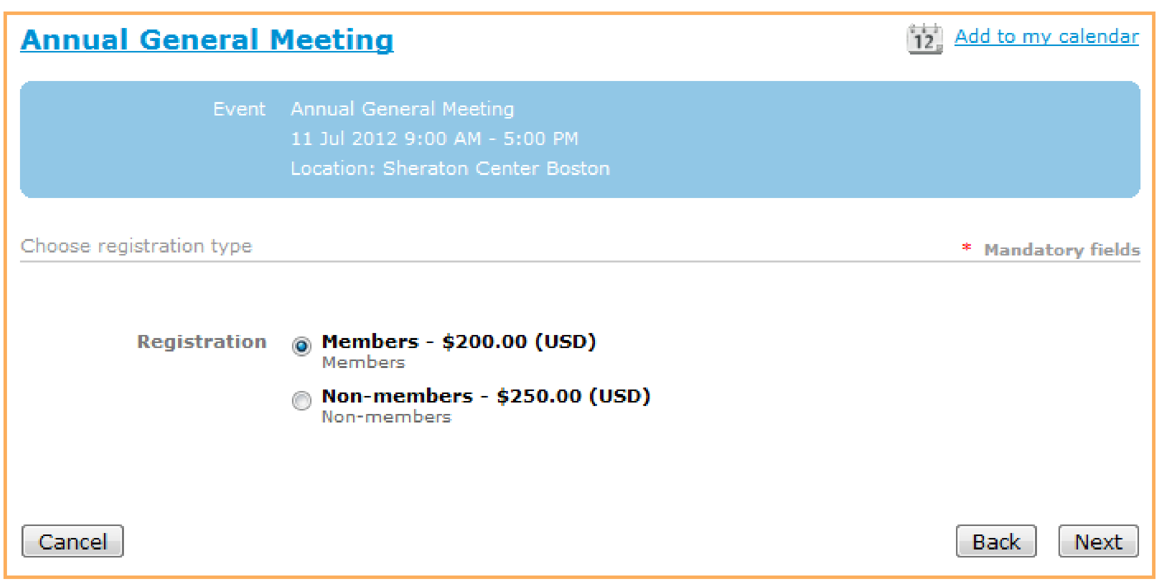
When visitors to your site click the **Register** button for an event, the following event registration forms appear:

Read more/less

1. First, they will be asked to enter their email address. If they are logged in, their email will already be filled in (though they can change it, to register another person).

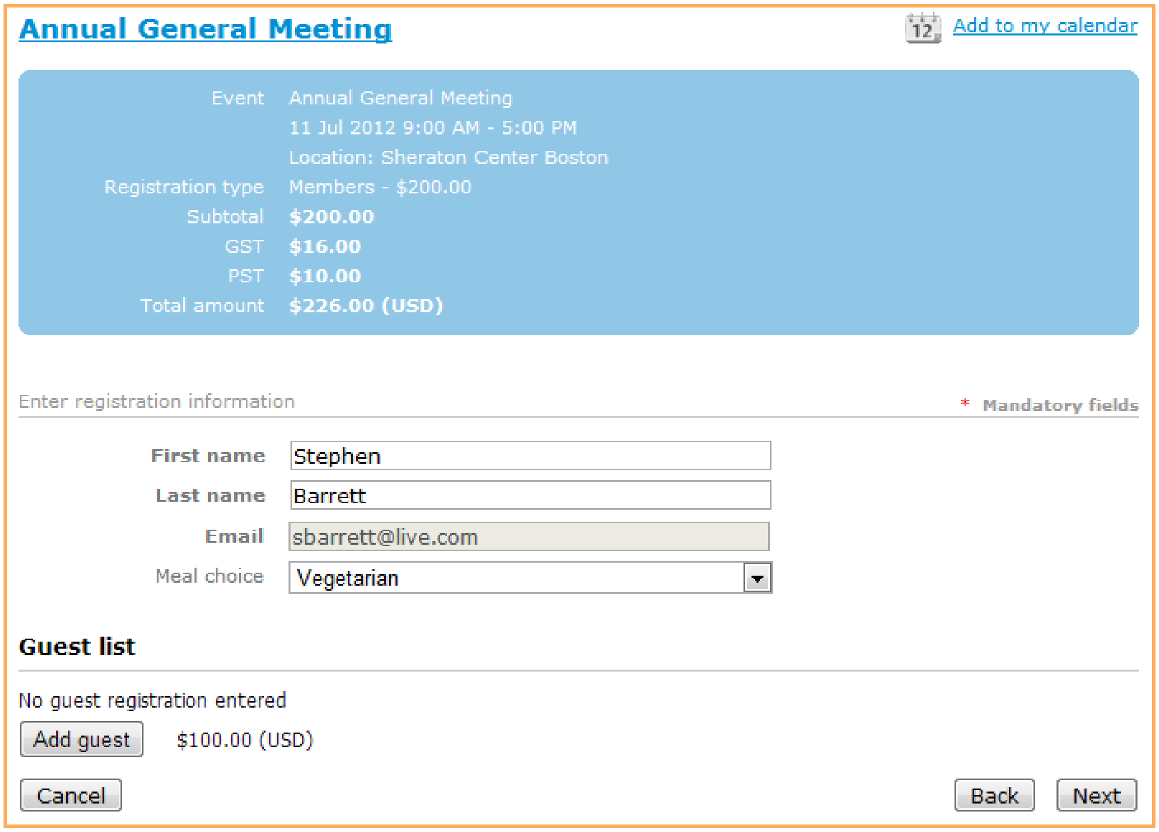


2. If there are multiple registration types, they will then be asked to select a registration type.



Depending on whether they are logged on or not, some member-only registration types may not be available. If they are not logged in, but their email is stored in your contact database, they will be prompted to log in. If their email is not stored in your contact database, they will be prompted to apply for membership.

3. Now, the main registration form appears.



Once they complete the form and click **Next**, the event record is created and they will be prompted to confirm the transaction. If the registrant is not currently in your database, a new contact record will be added and an email will be automatically sent to them with their password and other login information.

Customizing event fields

The main event registration form consists of two sections:

- contact fields
- events fields

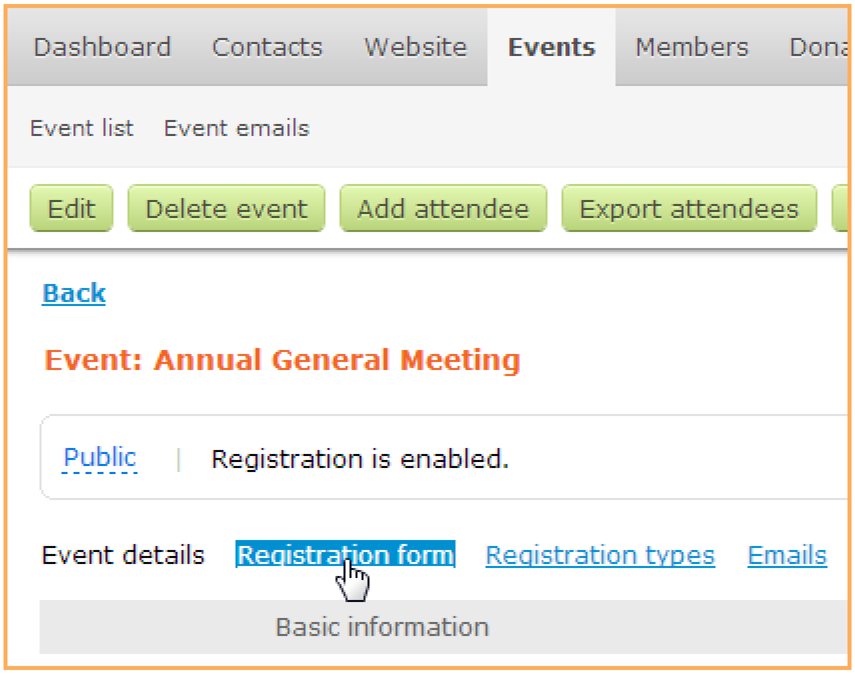
You can customize the main registration form by excluding common fields – contact fields used on various forms – and adding custom event fields. For example, you can add an event field for meal selection, and another to offer preferred seating. Depending on how you set up the field, an additional cost can be added at checkout.

> Values entered in common fields on event registration forms will not update corresponding fields in the registrant's contact record, but are stored separately within event registration records. See Customizing your common database fields for more information.

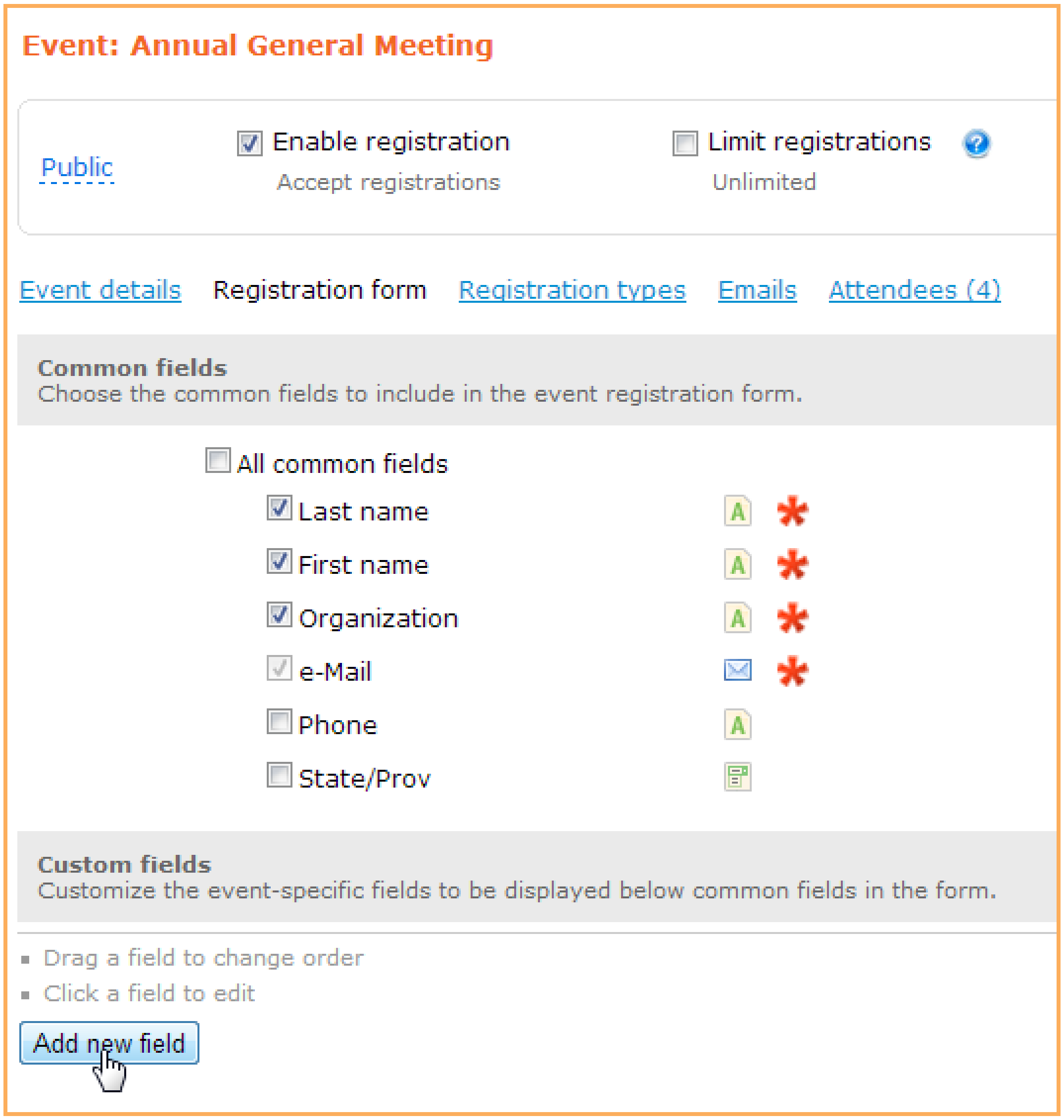
To customize an event registration form, follow these steps:

Read more/less

1. Hover over the **Events** menu and select the **Events list** option.
2. Within the event list, click on the event whose form you want to customize.
3. Click the **Registration form** link.



4. Click **Edit**.
5. From the screen that appears, you can choose which common fields to include, and add custom event fields for this event only.



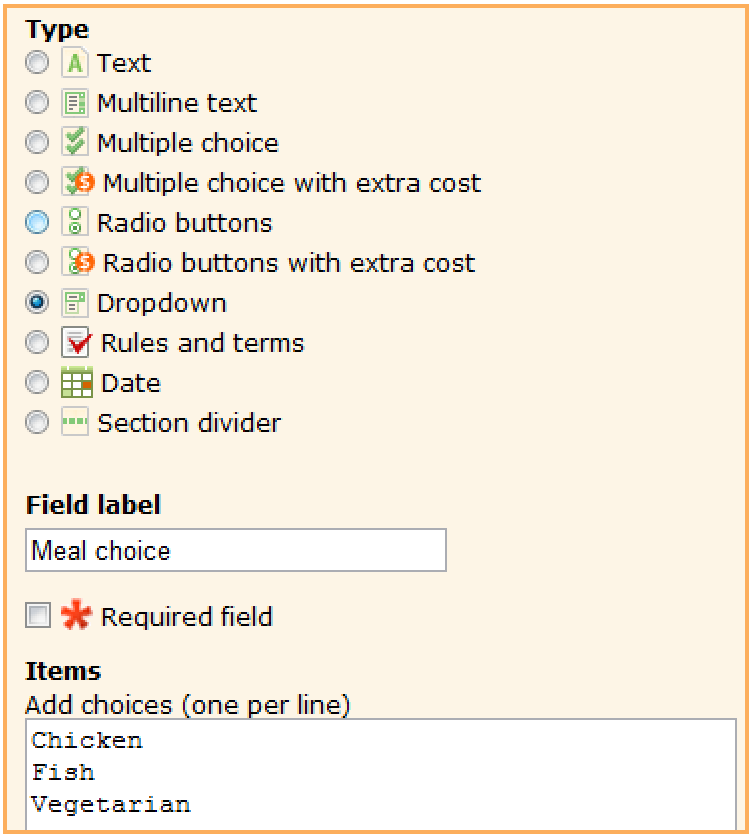
You cannot de-select the e-mail field.

6. When you are finishing making your changes, click **Save**.

Adding fields

To add a new field, click **Add new field**. For new fields, you can set the field type and change field settings.

Read more/less



The following field types are available:

Type	Description
Text	Simple text field, used for short entries.
Multiline text	Used for longer text entries of up to 3,000 characters.
Multiple choice	A set of checkboxes. See Working with list fields.
Multiple choice with extra charge	A set of checkboxes, each with an associated cost. Allows you to provide additional event options at a separate cost. For more information, see Extra event registration costs - dynamic event pricing .
Radio buttons	A set of mutually exclusive choices, arranged like buttons on a car radio. See Working with list fields.
Radio buttons with extra charge	A set of mutually exclusive choices, arranged like buttons on a car radio, each with an associated cost. Allows you to provide additional event options at a separate cost. For more information, see Extra event registration costs - dynamic event pricing .
Extra charge calculation	Provides the ability to order multiple items, or to charge an additional fee proportional to a value entered by the registrant. For organizational members, you might want to charge an extra fee based on their revenue, number of staff, or grants they've received. For more information, see Using the extra charge calculation field .
Dropdown	A set of mutually exclusive choices, arranged in a drop-down list. See Working with list fields.

Rules and terms	A checkbox with a link to documentation of waivers, terms of use, contractual conditions, etc. For more information, see Field for contractual terms.
Date	Displays a calendar control that can be used to select a date.
Section divider	Used to group and separate fields.

For each field, the following settings are available:

Setting	Description
Field label	The name used to identify the field. The field label must be unique among all event fields and common fields.
Required field	Controls whether the field has to be filled out before the form can be submitted. For all self-service online forms, (member application, email subscription, donation, and event registration), the Email field is always required.
Items	For multiple choice, radio buttons, and dropdown fields, you choose the options to be displayed. Click an existing option to change or remove it. Click **Add new item** to add more items to the list. See Working with list fields.
Field instructions	Instructions explaining how to use this field. For information on controlling the appearance of field instructions, see Adding field instructions.

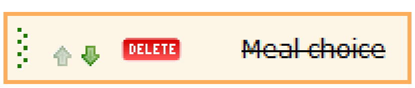
Deleting fields

Deleting a field will lose the data stored in that field for all current event registrants.

To delete a field, click it within the list, then click the **delete** link on the right.

Read more/less

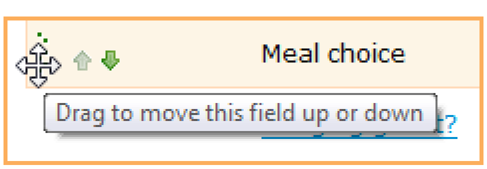
After you delete a field, it appears crossed out in the field list until you save your changes.



While the field appears crossed out, you can restore it by clicking the restore link.

Reordering fields

To change the order in which fields appear, you can drag and drop fields within the list, or you can click the green up and down arrows beside a field.



Changing colors and fonts

You can change the colors and text styles used on your event registration form from the Colors and styles screen. For a complete list of the elements you can modify, click here.

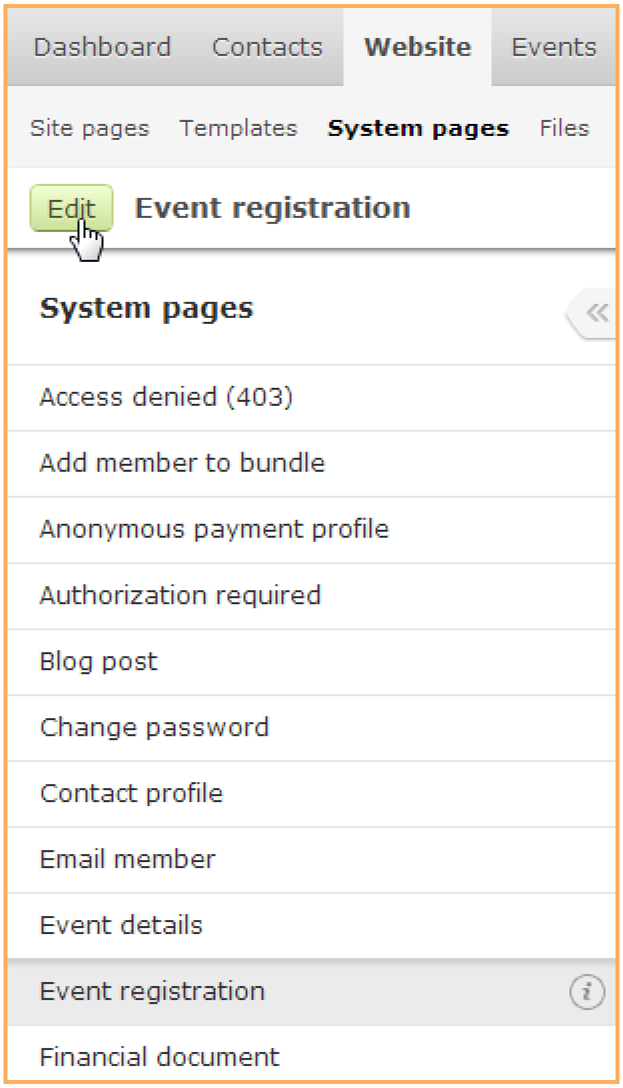
Any changes you make will be applied to other gadgets that use the same settings.

Modifying the event registration system page

You customize the system page used to display the event registration form by adding content .

To customize the event registration system page, follow these steps:
Read more/less

1. Hover over the **Website** menu and select the **System pages** option.
2. Within the system page list, select **Event registration**.
3. Click the **Edit** button.



Now, you can modify the system page in a number of ways. You can:

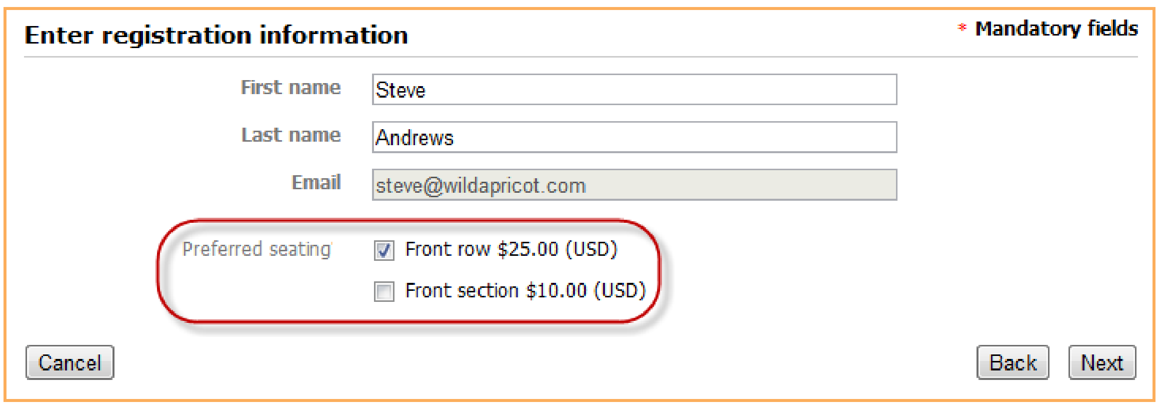
- Change the page template from the page settings on the left.
- Hover over the blue box – the system gadget that displays the actual registration form – and click the **Settings** icon to display the settings for the system gadget.
- Click the **Gadget** or **Layout** drop-downs to insert gadgets and layouts above or below the system gadget.

When you are finished modifying the event registration system page, click the **Save** button.

Extra event registration costs - dynamic event pricing

Extra event registration costs

For each event, you can charge extra for optional benefits or activities. For example, you could offer preferred seating or discounted concert tickets. The charges for these options would be in addition to the registration fee.



You can also add extra charges that are calculated using a value entered by the registrant. For example, you could add an option to purchase a specific of items, or charge a variable event surcharge based on organization size or income.

To provide optional extras at a separate cost for an event, you add custom event fields to the event registration form. Event fields are combined with common fields from your contact database to form the event record and populate the registration form.

There are two types of extra cost fields: static fields which provide options that registrants simply choose, and calculated extra charge fields which display an input field whose value is used to calculate the actual charge.

Adding static extra cost fields

Read more/less

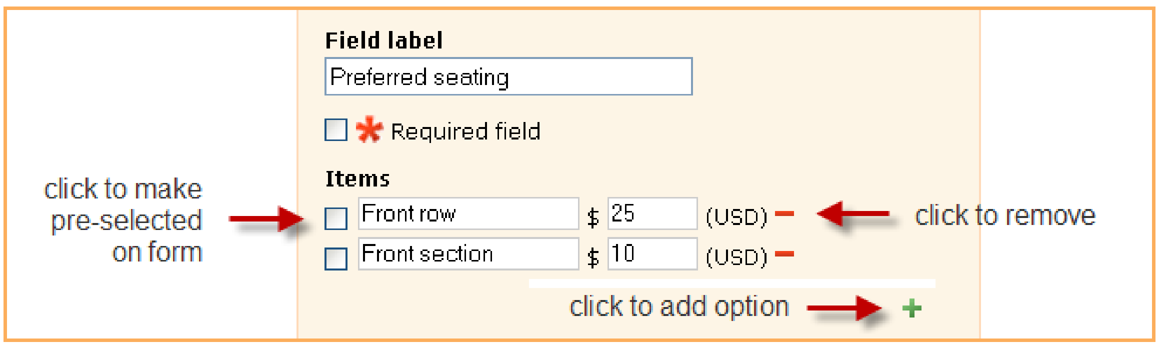
Static fields provide options that a registrant can choose or choose from, such as preferred seating or meal choice.

To add static extra cost fields to the registration form for an event, follow these steps:

1. Hover over the **Events** menu and select the **Event list** option.
2. Within the events list, click the event.
3. Click the **Registration form** link.
4. Click the **Edit** button towards the top of the screen.
5. Click the **Add new field** button.
6. Under **Type**, choose one of the following types for the new field.

Type	Description
Multiple choice with extra cost	A set of checkboxes, each with an associated cost. Choose this type if you want to allow the registrant to make multiple selections.
Radio buttons with extra cost	A set of mutually exclusive choices, arranged like buttons on a car radio, each with an associated cost. Choose this type if you want to allow the registrant to make a single choice from multiple options.

7. In the **Field label** box, enter a name for the field. The name will appear as the label for the field on the event registration form.
8. Under **Items**, choose the options to be displayed for this field on the event registration form, and specify the costs of each. Click **Add new item** to add items to the list. Click the minus sign beside an existing option to change or remove it. If you want an option to appear already selected on the form – to be checked by default – click the checkbox beside the item.



9. Enter **Field instructions** explaining how to use this field. For information on controlling the appearance of field instructions, see Adding field instructions.
10. Click **Save** to save your changes.

Adding calculated extra cost fields

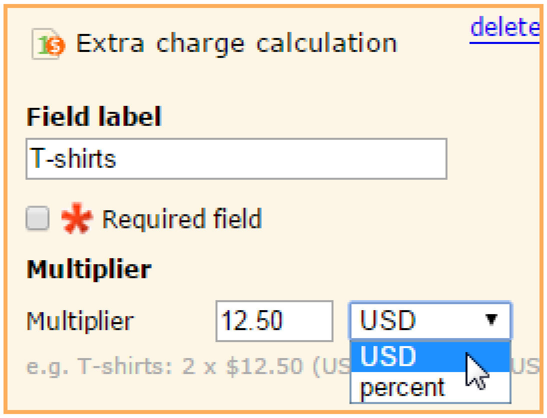
Read more/less

You can add calculated extra cost fields that calculate an extra charge using a value entered by the registrant. For example, you could add an option to purchase a specific of items, or charge a variable event surcharge based on organization size or income.

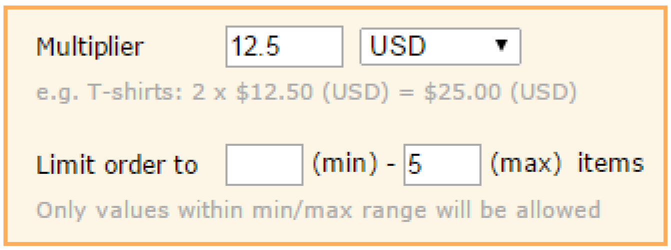
To add calculated extra cost fields to the registration form for an event, follow these steps:

1. Hover over the **Events** menu and select the **Event list** option.
2. Within the events list, click the event.
3. Click the **Registration form** link.
4. Click the **Edit** button towards the top of the screen.
5. Click the **Add new field** button.
6. Under **Type**, choose **Extra charge calculation** .
7. In the **Field label** box, enter a name for the field. The name will appear as the label for the field on the event registration form.
8. Under **Multiplier** , choose whether to specify a unit cost or a percentage to be applied to the entered value. To do so, click the dropdown that initially displays the currency you chose in your online payment settings , and choose the currency if you want to

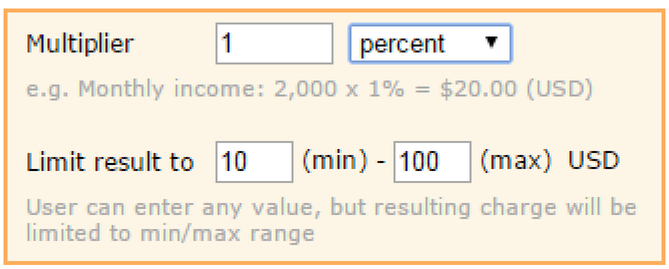
specify a unit cost, or **percent** if you want to apply a percentage to the entered value.



9. If you choose the currency, so you can specify a unit cost, you can also specify the minimum and maximum number of items you visitor can order.



If you are applying a percentage, you can specify a minimum and a maximum resulting value.



Values entered by the applicant or registrant that result in charge below the minimum or above the maximum will be automatically adjusted to fit within the limits.

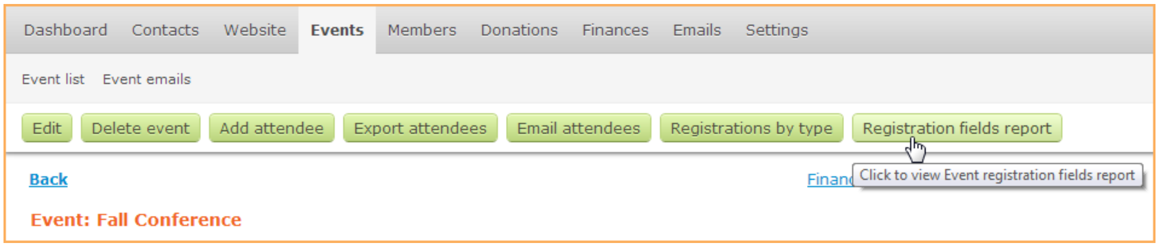
10. Enter **Field instructions** explaining how to use this field. For information on controlling the appearance of field instructions, see Adding field instructions.
11. Click **Save** to save your changes.

Generating a registration fields report

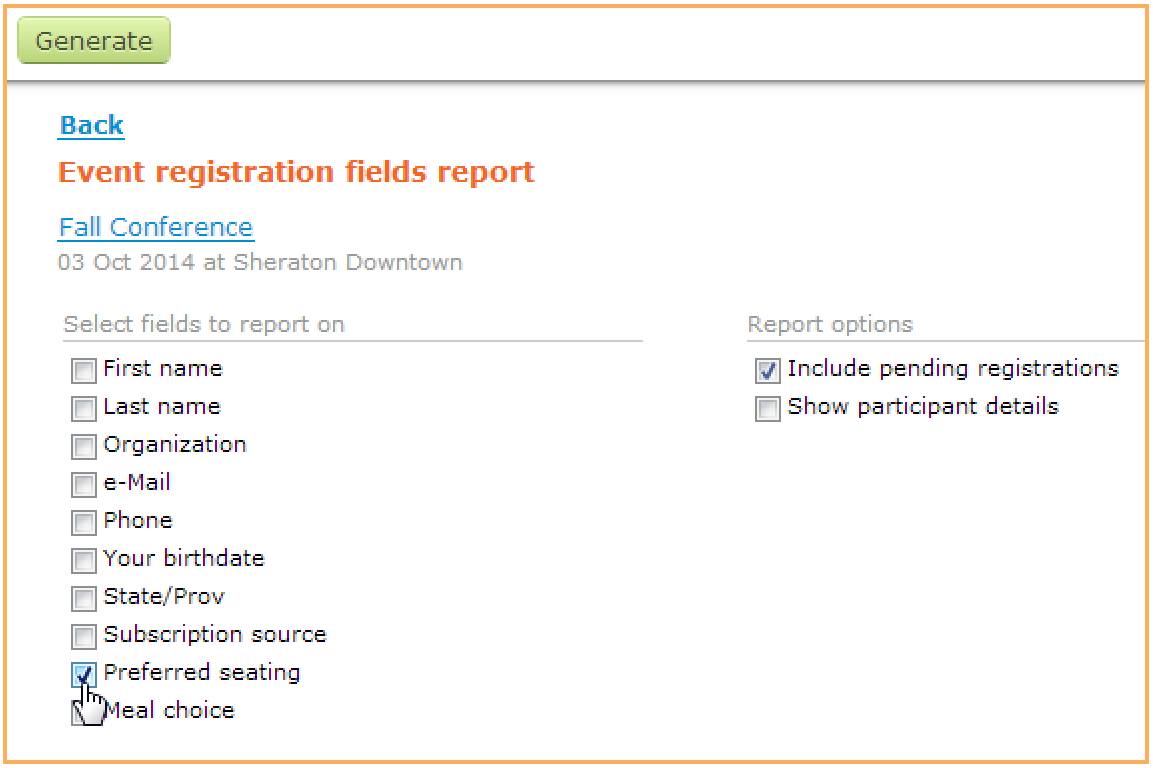
Read more/less

After you have begun receiving registrations for your event, you can generate a report summarizing the choices made by event registrants. To generate the report, follow these steps:

1. Hover over the **Events** menu and select the **Event list** option.
2. Click the event within the events list.
3. Within the event details, click the **Registration fields report** button.



4. Select the registration fields to be reported on, and indicate whether to include pending registrations and show attendees details.



5. Click **Generate**.

If you didn't choose to show attendee details, a simple count will be displayed:

If you chose to show attendee details, the report will display the name, email, and registration status for the registrants for each choice.

Event registration fields report

Annual General Meeting

30 Mar 2013 at Boston Sheraton Center

Fields and options	Selected	Participant details		
Preferred seating				
Front row $25.00 (USD)	3	Grace, Georgia	gg@hotmail.com	confirmed
		Hynde, Christine	chynde@mail.com	confirmed
		Rose, Carly	crose@mail.com	confirmed
Front section $10.00 (USD)	2	Clapton, Derick	derick@dominos.com	confirmed
		Mellor, John	woody@hotmail.com	confirmed
No entry	5			

On this page:

Expand all sections

Event coupon codes

Event coupon codes

You can offer a discounted event registration fee for selected registrants using event coupons – aka registration codes. Registrants can enter the coupon code when registering for the event.

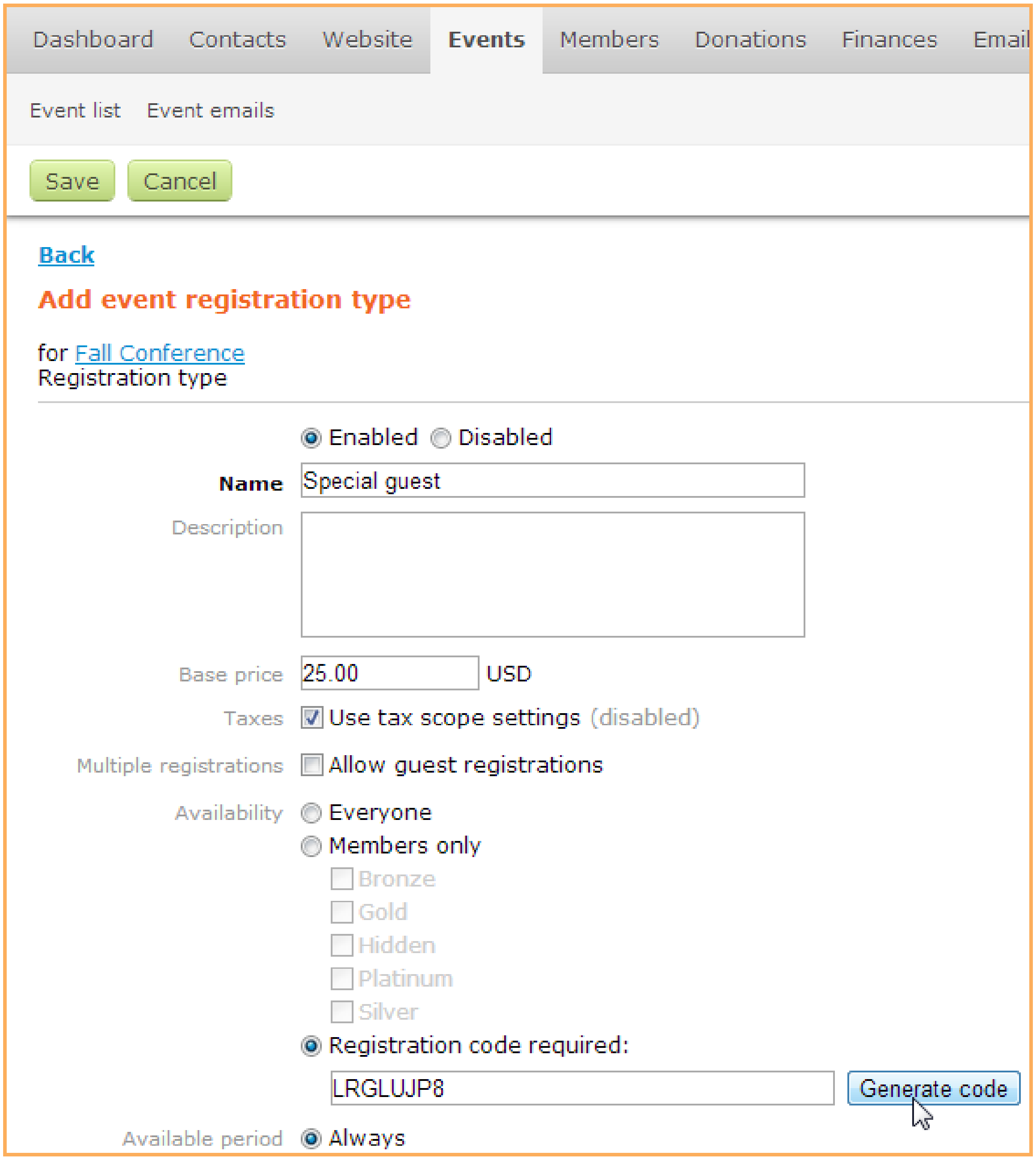
Setting up event coupons

Event coupons are set up separately for each event using special event registration types.

To create an event coupon, follow these steps:

Read more/less

1. Hover over the **Events** menu and select the **Event list** option.
2. Select the event within the list.
3. Click **Registration types & settings**. (If you have made any changes to the event details, you'll need to click the **Save** button to save them.)
4. Click **Add type**.
5. Enter a name for the registration type (e.g. Special guest).
6. Enter a reduced base price.
7. Click the **Registration code required** option under **Availability**.
8. Enter the coupon code yourself or click the **Generate code** button to create a randomly generated code.

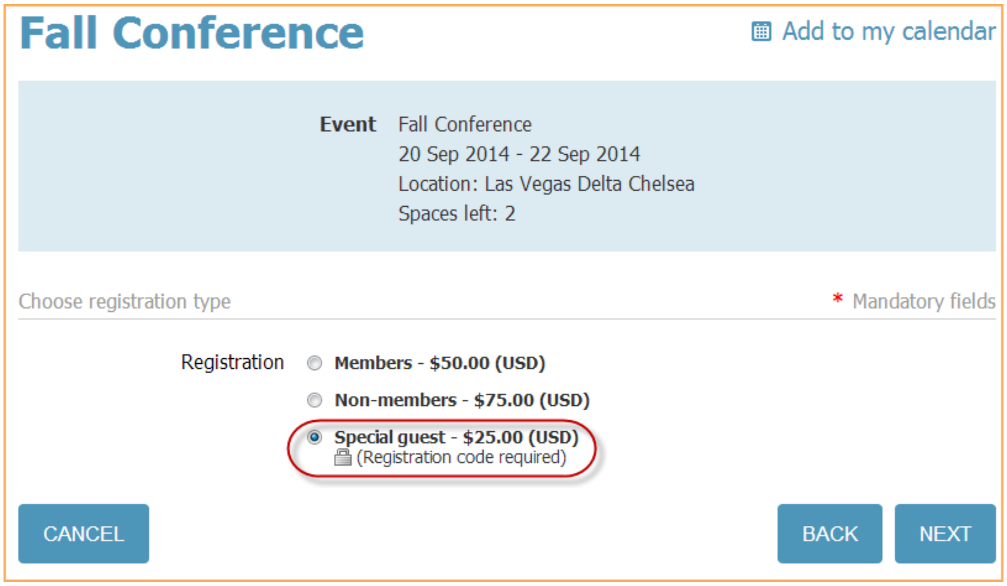


9. Click the **Save** button to save your changes.

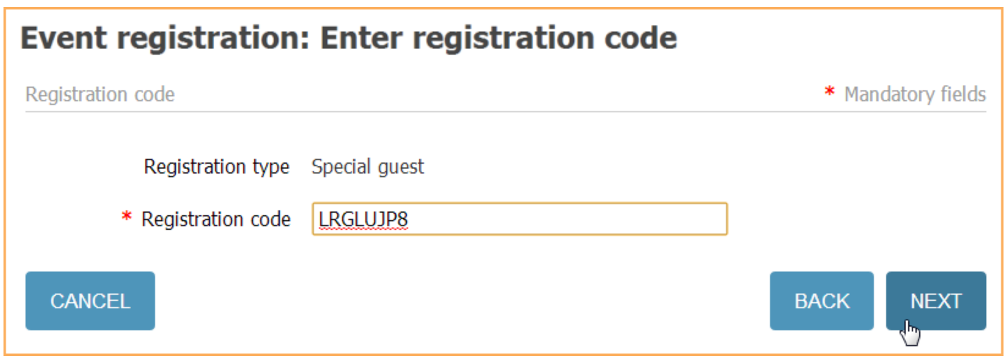
Using event coupons

The registration code can be provided to members and other supporters by email or any other method. On the event registration form, registrants select the registration type with the coupon code, indicated by a lock icon.

Read more/less



On the next screen, the registrant enters the coupon code.

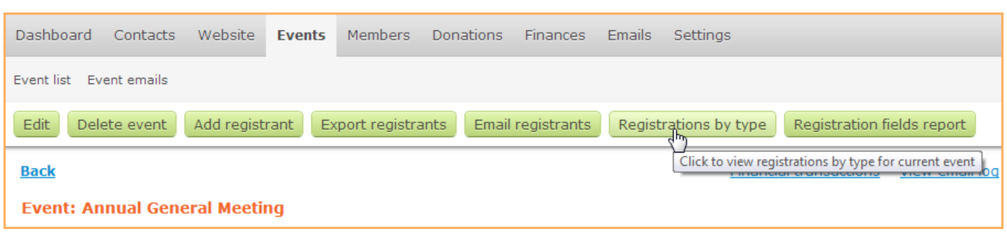


Tracking event coupon use

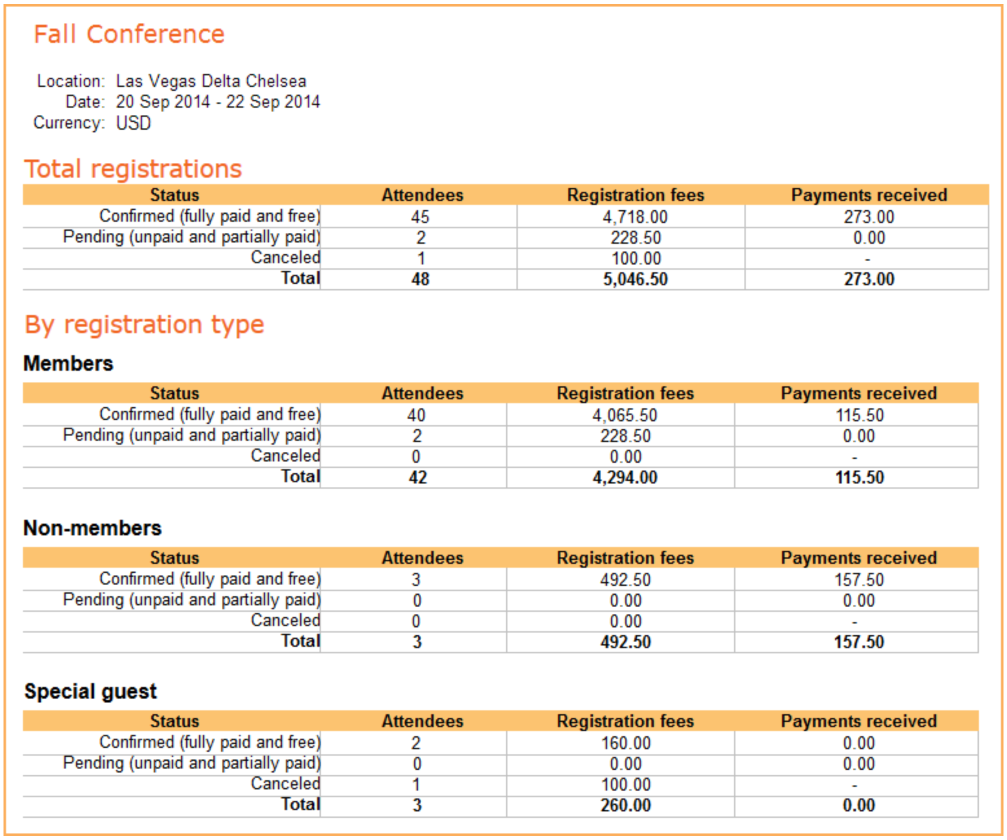
If you want to know how many people have used an event coupon for a particular event, follow these steps:

Read more/less

1. Hover over the **Events** menu and select the **Event list** option.
2. Click the event within the events list.
3. Within the event details, click the **Registrations by type** button.



The report that appears lists the number of attendees, the amount collected, and the amount owing, broken down by registration type.



Fall Conference

Location: Las Vegas Delta Chelsea
Date: 20 Sep 2014 - 22 Sep 2014
Currency: USD

Total registrations

Status	Attendees	Registration fees	Payments received
Confirmed (fully paid and free)	45	4,718.00	273.00
Pending (unpaid and partially paid)	2	228.50	0.00
Canceled	1	100.00	-
Total	**48**	**5,046.50**	**273.00**

By registration type

Members

Status	Attendees	Registration fees	Payments received
Confirmed (fully paid and free)	40	4,065.50	115.50
Pending (unpaid and partially paid)	2	228.50	0.00
Canceled	0	0.00	-
Total	**42**	**4,294.00**	**115.50**

Non-members

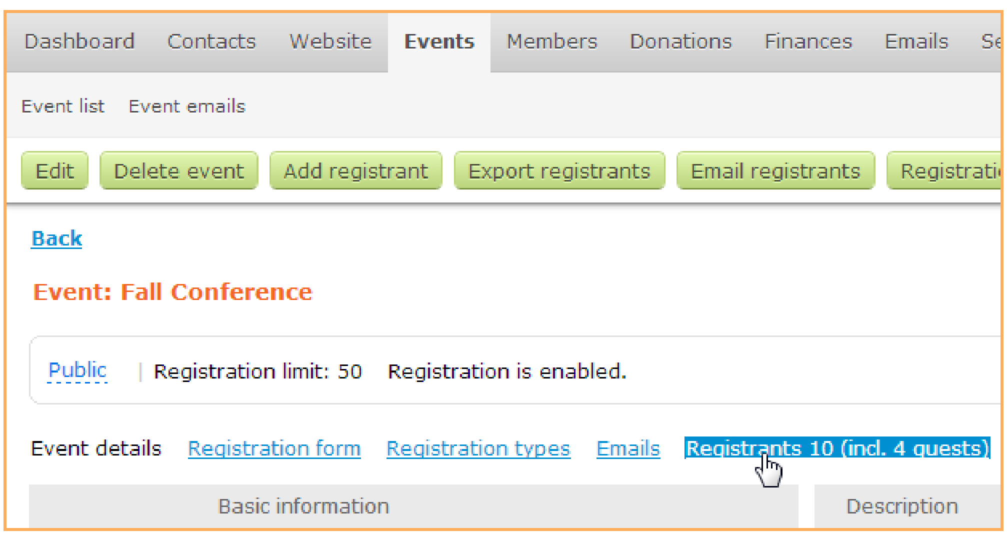
Status	Attendees	Registration fees	Payments received
Confirmed (fully paid and free)	3	492.50	157.50
Pending (unpaid and partially paid)	0	0.00	0.00
Canceled	0	0.00	-
Total	**3**	**492.50**	**157.50**

Special guest

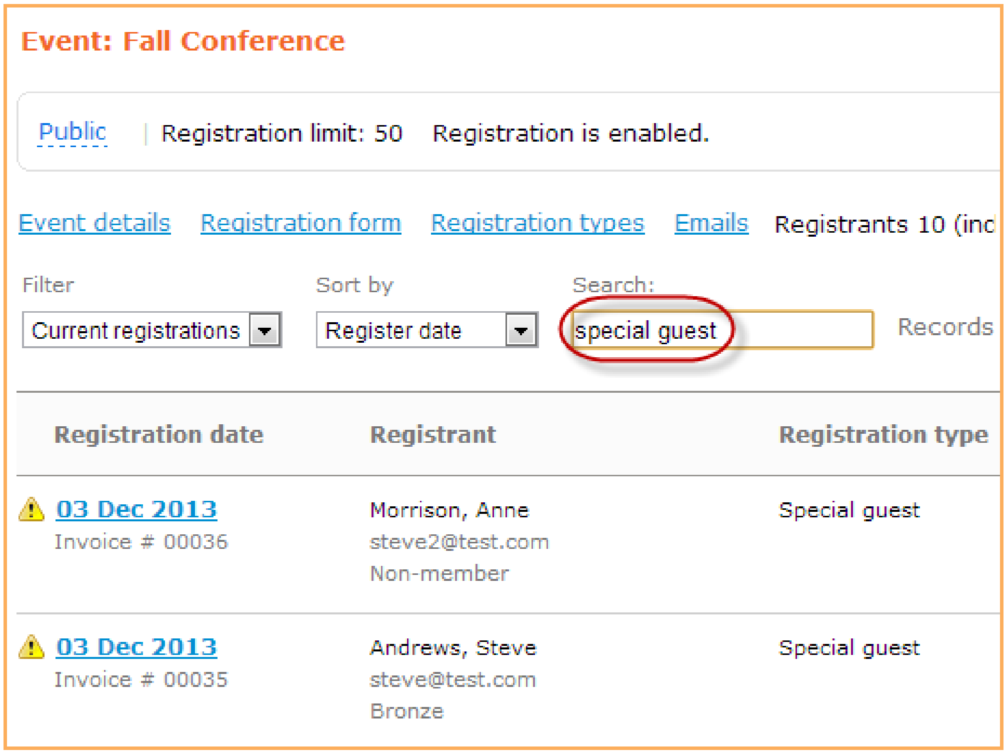
Status	Attendees	Registration fees	Payments received
Confirmed (fully paid and free)	2	160.00	0.00
Pending (unpaid and partially paid)	0	0.00	0.00
Canceled	1	100.00	-
Total	**3**	**260.00**	**0.00**

If you want to know which attendees have used an event coupon for a particular event, follow these steps:

1. Hover over the **Events** menu and select the **Event list** option.
2. Click the event within the events list.
3. Within the event details, click the **Attendees (** ***n*** **)** link.



4. Filter the list of attendees by entering the name of the event registration type associated with the coupon in the **Search** field.



On this page:

- Setting up event coupons
- Using event coupons
- Tracking event coupon use

Expand all sections

Registration types and settings

Registration types and settings

From the **Registration types & settings** tab, you can control various event settings and set up event registration types.

Registration settings

Registration settings apply to the entire event. The following event registration settings are available.

Limit registrations

Allows you to set a limit on the total number of registrations for the event. You can also set registration limits for individual registration types.

After the event registration limit is reached, the registration will be closed and an email will be sent to the event organizer. On your event calendar page, visitors will see that the event is closed for registration, and that there are no spaces left.

For more information, see Capping event registrations.

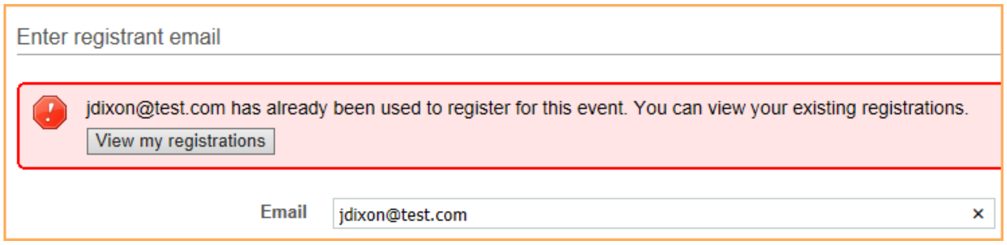
Enable waitlist when limit is reached

Controls whether prospective registrants can join a waitlist after the registration limit is reached for the event. (This option is only available after you've set a registration limit.) Using the accompanying drop-down list, you can choose the how much information to collect from people wanting to join the waitlist. When the waitlist is enabled, a **Join waitlist** button appears within the event details on your public site when the registration limit is reached. For more information, see Event waitlists .

Multiple registrations

Controls whether visitors can register multiple times for the same event. You can enable multiple registrations for the entire event or for individual registration types.

With this option checked – so that multiple registrations are disabled – an attempt by a registrant to register a second time will generate an error.



Whether the option is enabled or not, an administrator can still set up multiple registrations for a contact, but will be warned about the existing registration.

Payment method

Allows you to choose whether to accept online and/or online payments for the event. The online option is only available if online payments have been enabled for your site.

Depending on which payment method option you choose, different payment workflows will take place.

- If only offline payment is enabled, then an invoice will be emailed to the contact after they click the **Confirm** button – unless invoice emails have been disabled from the Invoice and receipt settings – and a registration summary will be displayed. From the registration summary, the contact can choose to view or pay the outstanding invoice.
- If only online payment is enabled, then a **Pay online** button will appear. Clicking the **Pay online** button will take the contact to the online payment screen for your site's payment provider.
- If both online and offline payment is enabled, then two buttons will be displayed: **Pay online** and **Invoice me**. Clicking the **Pay online** button will take the contact to the online payment screen for your payment provider. Clicking the **Invoice me** button will result in the contact being emailed an invoice – which they can pay online or offline – and a registration summary being displayed. From the registration summary, the contact can choose to view or pay (online) the outstanding invoice.

When paying using PayPal Payments Pro, the **Pay online** button with be replaced with two buttons: **Pay with credit card**, and **PayPal Express checkout**.

Event registration types

For each event, you can set up different registration types. Registration types are like ticket types for a particular event. Setting up registration types allows you to charge different prices for different event packages or for different kinds of attendees. For example, you might want to charge more for non-members, or for special seating.

You can cap the number of registrations for each registration type – separately from any overall event registration limits. For example, you might want to offer a limited number of lower cost student registrations. You can also define a registration window – starting and end dates – to allow for limited time discounts. As well, you can control whether contacts can register multiple times for the same event.

You have to set up registration types before you can enable an event for registration. Creating an event by copying an existing one will copy the registration types as well.

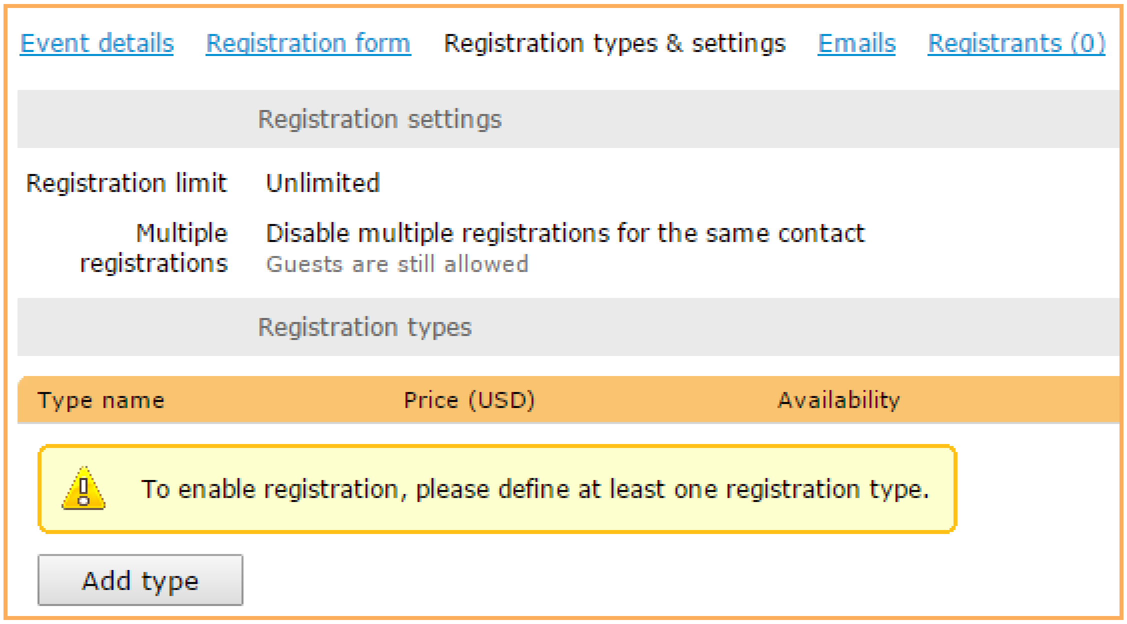
Managing registration types

To manage registration types for an event, follow these steps:

Read more/less

1. Hover over the **Events** menu and select the **Event list** option.
2. Select the event within the list.
3. Click **Registration types & settings** tab.

If you created the event from scratch, you will be prompted to create a registration type.



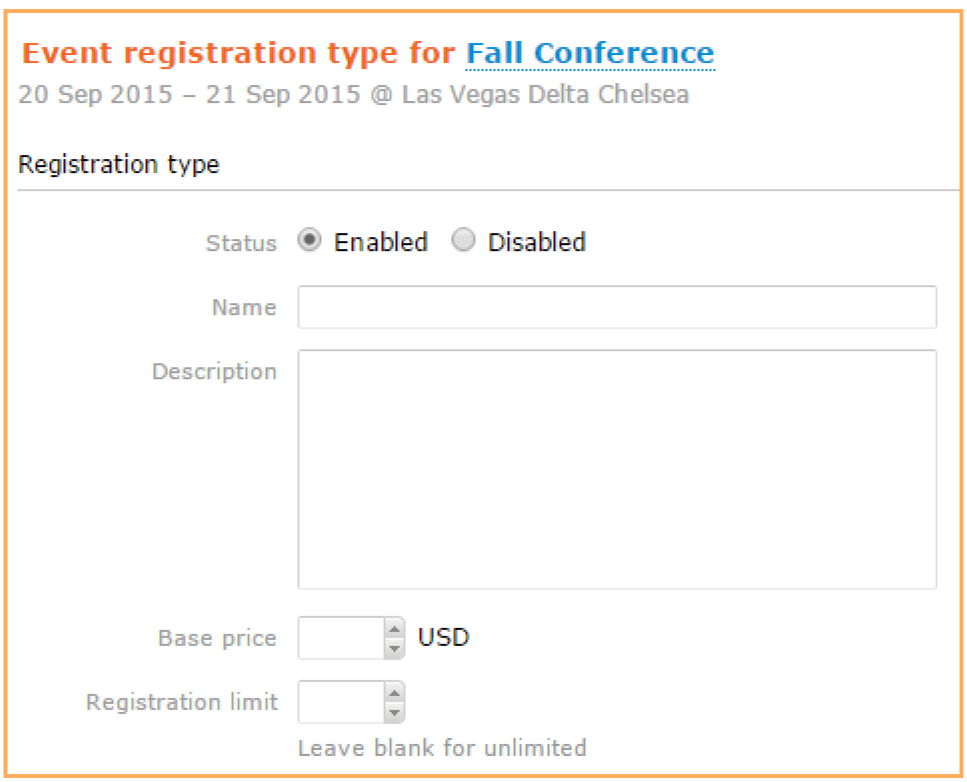
If the **Add type** button is grayed out, it's because you are currently editing other event details. You cannot add registration types while in edit mode. You have to click the **Save** button to save your changes or click the **Cancel** button to discard them.

Adding a registration type

To add a registration type, click the **Add type** button from the **Registration types & settings** screen. If this button is grayed out, you need to exit edit mode by clicking the **Save** or **Cancel** button.

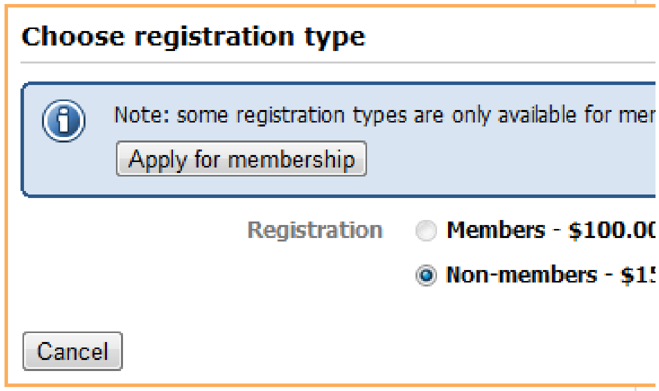
Read more/less

Once you click the **Add type** button, the following screen appears:



From here, you can control the following settings for the new registration type:

Setting	Description
Enabled/Disabled	Controls whether the registration type is active.
Name	Name used to identify the registration type (e.g. *Non-member* or *VIP seating*). This will be displayed to the registrant when asked to choose the registration type. Registration types are displayed in alphabetical order on the event registration form, so if you want to re-order them, you have to rename them or add numbers ahead of the names. If you have 10 or more events, the numbering should begin with 01 for proper alphabetical sorting. Similarly, if you have 100 or more events, the numbering should begin with 001.
Description	Description of the registration type.
Base price	Base price for this registration type. This does not include any additional event options available for a separate cost.
Registration limit	The maximum number of registrations allowed for this registration type. Leave this field blank if you don't want to set any limit. An overall registration can also be set for the event itself.
Waitlist	Controls whether prospective registrants can join a waitlist after the registration limit is reached for this type. (This option is only available after you've set a registration limit.) Using the accompanying drop-down list, you can choose the how much information to collect from people wanting to join the waitlist. When the waitlist is enabled, a **Join waitlist** button appears within the event details on your public site when the registration limit is reached. For more information, see Event waitlists.
Taxes	Choose whether to follow the tax scope settings, or ignore the tax scope and apply or disable tax for this registration type. See Setting up and applying taxes for more information.
Multiple registrations	Controls whether contacts can register multiple times for the same event. When multiple registrations are disabled at the event level, this option will not be available for individual registration types.
Guest registrations	If enabled, registrants can register guests at the same time that they submit their own registration. You can control whether to collect contact information for each guest, collect full registration information for each guest, or just ask for the total number of guests. Unless you choose to collect full registration information for each guest, you can charge a special guest price for the event.
Availability	Controls whether this registration type is available to everyone, just certain membership levels, or to anyone with the registration code you specify. Using registration codes allows you to offer discount pricing to selected people. Member-only registration types are not available to new members if their membership requires administrator approval, or if their membership requires payment before activation and payment has not yet been made.

Available period	Controls when this registration type is available. You can set a From date, a Through date, or both. Leave both fields blank if you don't want to set a date limit. Registration will remain open from 12:00 am on the From date, until 12:00 pm on the Through date.
If unavailable (Display options)	Determines what appears if this registration type is not available for a particular visitor. For example, you might have restricted registration to members only. You can choose to display the registration type grayed out with an option for non-members to sign up for membership...  ...or hide the registration type entirely.

Once you have finished setting up a registration type, click **Save**.

Modifying registration types

To modify a registration type, follow these steps:

Read more/less

1. Go to the **Registration types & settings** tab.
2. Click the registration type you want to modify.
3. Click the **Edit** button.
4. Make the necessary changes.
5. Click **Save**.

> If you can select a registration type for editing, it's because you are currently editing other event details. You cannot modify registration types while in edit mode. You have to click the **Save** button to save your changes or click the **Cancel** button to discard them.

Deleting registration types

> Before you can delete a registration type, you must remove everyone using the registration type from the registrants list and the waitlist.

To delete a registration type, follow these steps:

Read more/less

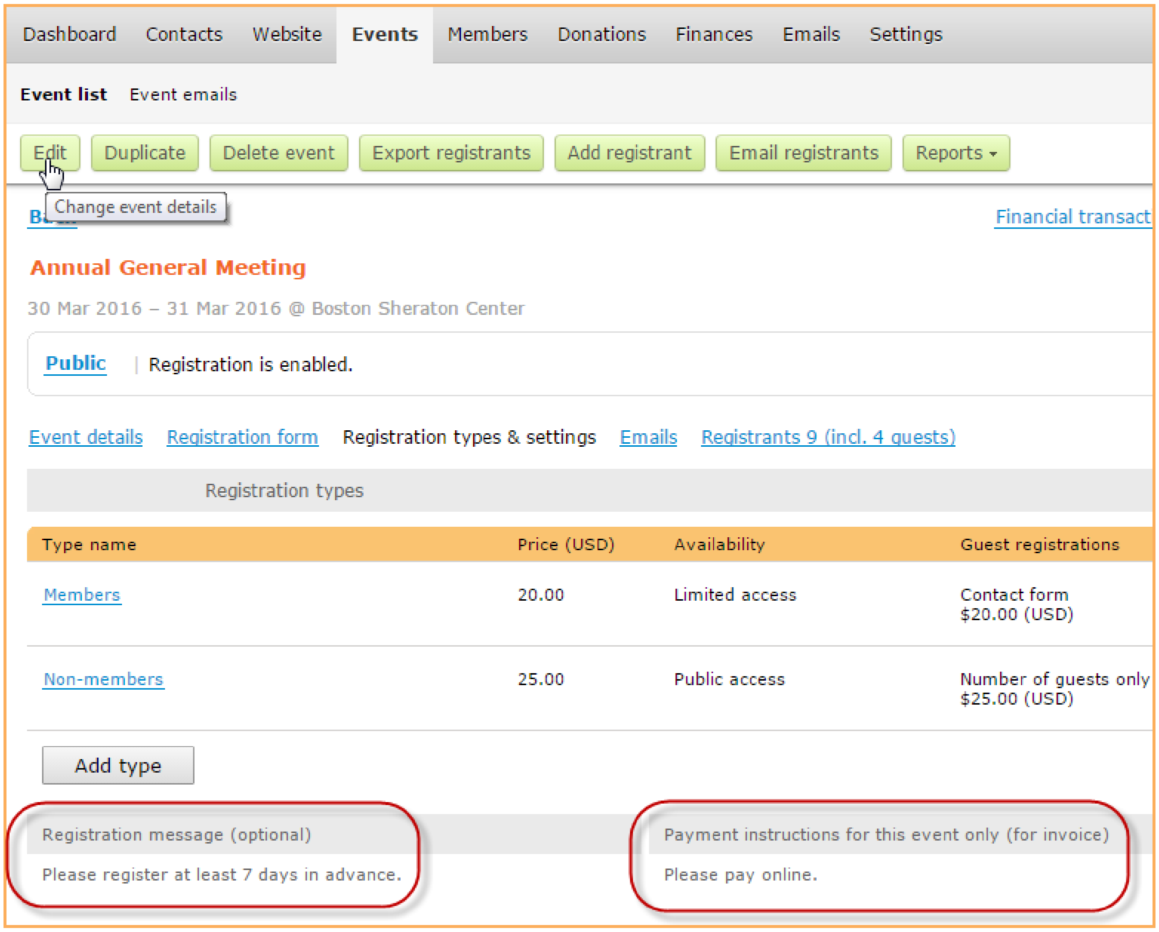
1. Go to the **Registration types & settings** tab.
2. Click the registration type you want to delete.
3. Click the **Delete** button.
4. Click **OK** when prompted to confirm the deletion.

Event registration message and payment instructions

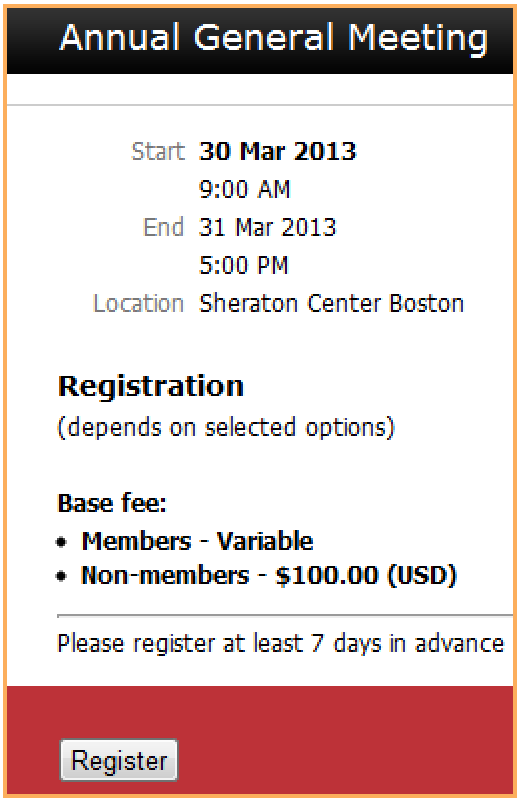
For each event, you can provide a registration message and payment instructions.

Read more/less

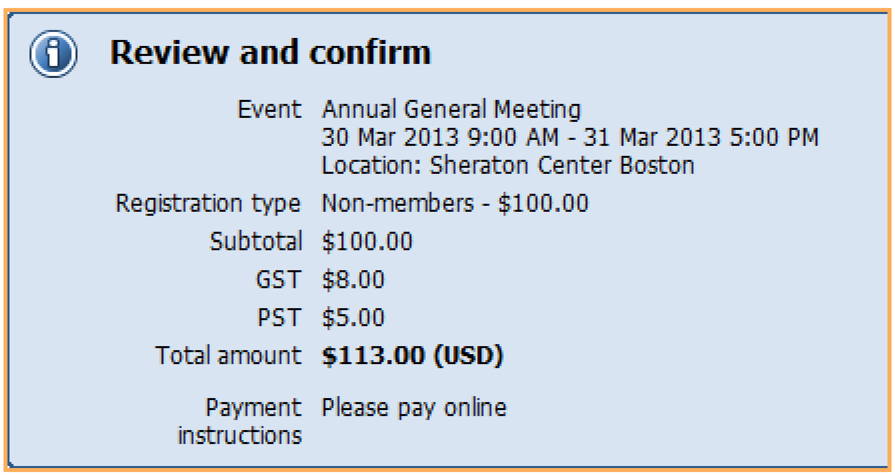
On the **Registration types & settings** tab, click the **Edit** button to enter edit mode.



The registration message is displayed on the event details page:



The payment instructions are shown on the payment confirmation screen:



The instructions you enter here will override the default event payment instructions entered in your payment settings.

On this page:

Expand all sections

See also:

- Extra event registration costs - dynamic event pricing
- Event coupon codes

Event emails

Event emails

For each event, you can set up multiple email announcements and event reminders to be sent, as well as registration messages. You can schedule each email to be automatically delivered a certain number of days before the event, or you can manually trigger the sending process at any time.

For announcements and registration messages, you can choose the types of contacts to be included as recipients. For announcements, you can include a **Not attending** button so that invitees can let you know if they are definitely not going to register. For more information, see Providing a Not attending option.

You can customize the generic event emails yourself, or you can use a previously sent email or choose one of the professionally designed email templates provided by Wild Apricot. In either case, you can add text, formatting, graphics, and links to the message. To personalize the message, you can use macros to insert specific information such as the recipient's first name or organization. After sending event emails, you can track whether they are delivered and opened.

⚠ The ability to customize event emails is not available for free plans. For more information, see Functionality by billing plan.

If you include similar content in emails for different events, you can modify the default event emails to include the shared content.

You can also email links to individual event pages.

Types of event emails

The following types of event emails can be sent.
Read more/less

Email type	Turn on/off?	Timing	Possible recipients
Announcement 1, 2, 3	Yes	*x* number of days before events	All contacts (other than those already registered or waitlisted for this event) or any combination of members, donors, attendees from past events, selected membership levels, selected member groups, saved contact and member searches, and all contacts without membership, registrations, or donations
Reminder 1, 2, 3	Yes	*x* number of days before events	Registrants (including guests)
Event registration confirmed	Yes	*For paid events:* after registration is paid or confirmed by administrator *For free events:* immediately	Registrant, registrant's guests, and/or event organizer

Event registration pending	Yes	*When registrant clicks **Pay online** button:* After 15 minutes, unless online payment has been completed *When registrant clicks **Confirm** or **Invoice me** button*: Immediately	Registrant, registrant's guests, and/or event organizer
New waitlist registration	Yes	Immediately	Registrant and/or event organizer
Invoice	Yes	*When registrant clicks **Pay online** button:* After 15 minutes, unless online payment has been completed *When registrant clicks **Confirm** or **Invoice me** button*: Immediately	Registrant and/or administrator
Receipt	Yes	When payment is received	Payer and/or administrator

For each event, you can control whether each type of message is sent, and who receives the messages. For announcements and reminders, you can control when the email is sent. For more information, see Email delivery options (below).

> Any changes to invoice and receipt settings will be applied to all invoices and receipts issued throughout your entire system, not just events.

All event emails can be customized. For more information, see Modifying event emails (below). For information on customizing invoice and receipt emails, see Customizing invoices and receipts .

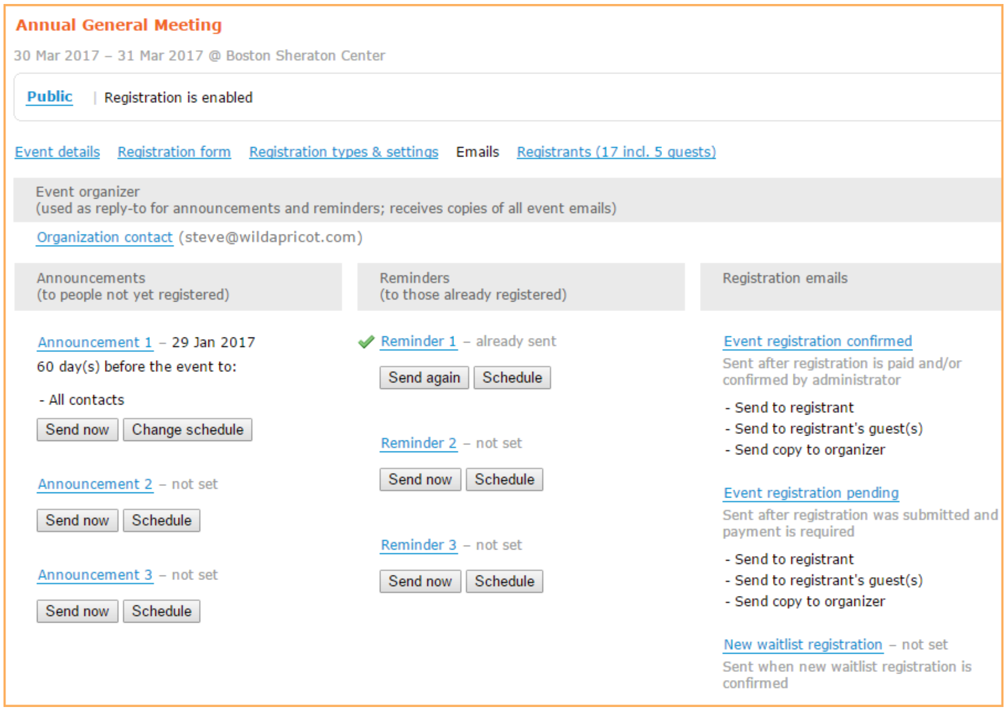
Setting up event emails

Settings up event emails involves customizing the emails, choosing which emails to send and when, and for some emails, choosing the recipients.

To set up the announcements, registration confirmations, and reminders for a particular event, follow these steps:

Read more/less

1. Hover over the **Events** menu and select the **Event list** option.
2. Select the event within the list.
3. Click the **Emails** link.



From here, you can set up the following event emails:

- announcements (up to 3)
- reminders (up to 3)
- registration confirmed (when registration is confirmed and/or paid)
- registration pending
- new waitlist registration

For announcements and reminders, you can schedule the delivery of the email, or send it immediately. For more information, see Email delivery options (below).

For announcements and registration messages, you can choose the recipients. For each event email, you can modify the content of the email.

Customizing event emails

You can customize each event email. You can compose the message yourself, use a previously sent email, or choose one of the professionally designed email templates provided by Wild Apricot.

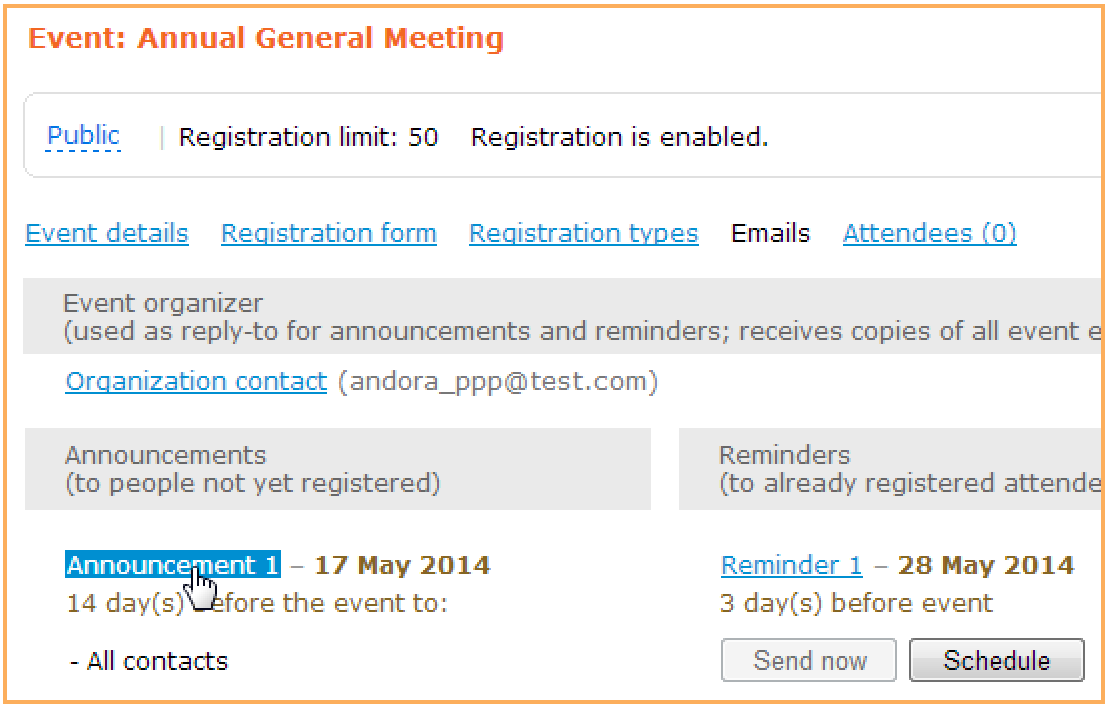
> ⚠ The ability to customize event emails is not available for free plans. For more information, see Functionality by billing plan.

If you create a new event by copying an existing event, the event emails will also be copied. When you create a brand new event, the event emails are copied from the default event emails.

To customize an event email, follow these steps:

Read more/less

1. Click the email link within the event emails page (e.g. **Announcement 1**).



2. From the screen that appears, click the **Edit** button.
3. Use the content editor to add or modify text, formatting, graphics, and links within the message. For more information on customizing emails, see Sending email blasts. You can also personalize the message by using macros to insert specific information such as the recipient's first name or organization. To add macros, click on the **{Macro}** button to access and insert the list of available event macros. For more information on customizing emails, see Sending email blasts.
4. Click **Save** to save the email.

To reset the email back to the default email, click the **Restore default** button.

> Event announcements that contain the {Registration buttons} macro will appear on the **Emails** tab with the phrase *Response requested* below the email link.

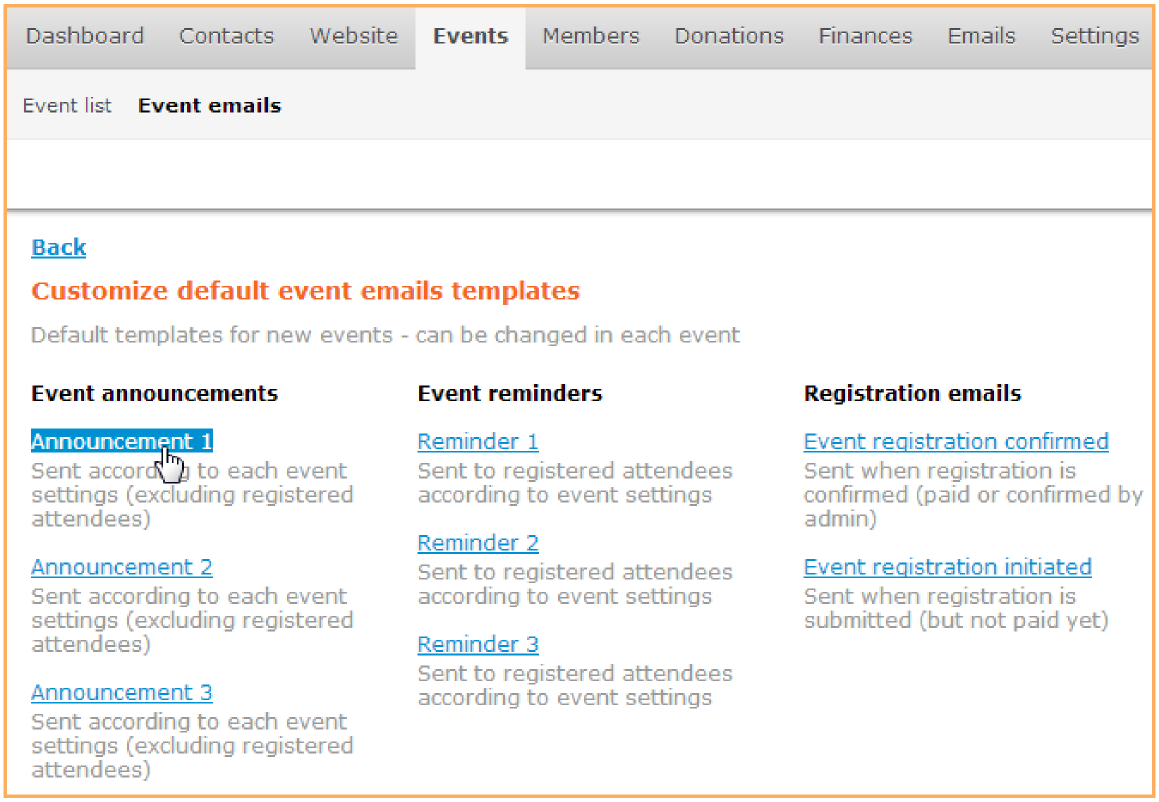
Modifying default event emails

When you create a brand new event, the event emails are copied from the default event emails. If you include similar content in emails for different events, you can modify the default event emails to include the shared content.

To modify default event emails, follow these steps:

Read more/less

1. Hover over the **Events** menu and select the **Event emails** option.
2. Click the default event email you want to modify (e.g. **Announcement 1**).

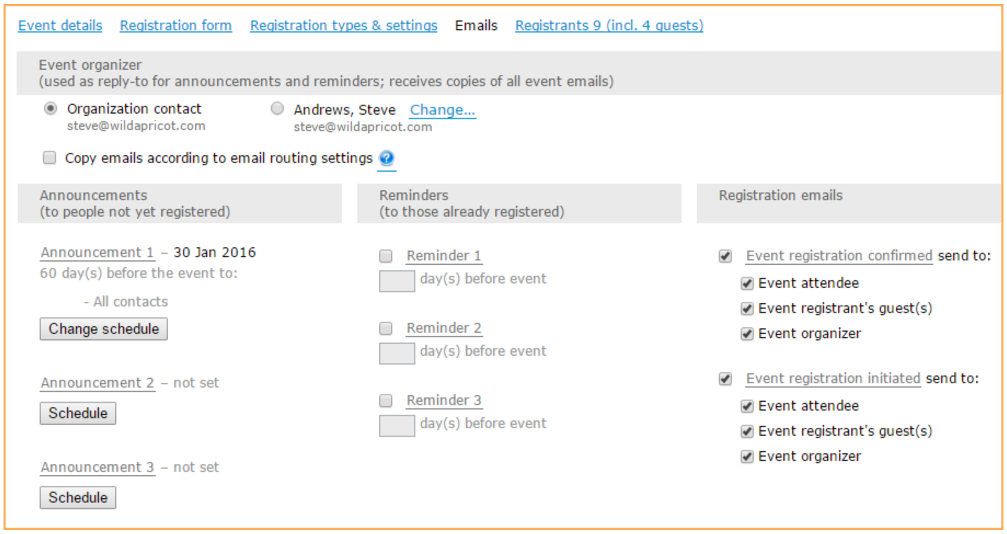


3. Click the **Edit** button.
4. Customize the message yourself or choose a previously sent email or email template to use as the basis for the email. To choose a previous email or an email template, click the **Copy from** button.
5. By default, event emails are basic emails without any layout. To apply a layout, click the **Layouts** icon towards the top of the screen, then select the layout you want to switch to, and click the **Apply** button. After applying a layout, you can click the Appearance icon and set a background color for the message, and change the font set. With a layout applied, you can click individual cells within the message and adjust cell settings, including background, padding, margins, and borders. For information on customizing emails, see Sending email blasts.
6. Click **Save** to save the default email.

Email delivery options

You can control whether announcements, reminders, and confirmation messages are sent. For announcements and registration messages, you can choose who should receive the email. For announcements and reminders, you can control how many days before the event the messages are sent. For announcements, you can also control who receives them.

To modify the email delivery options for an event, go the **Emails** page for the event then click the **Edit** button. The **Emails** page now displays options that allow you to control which messages are sent and when, and who receives them.



Scheduling event announcements

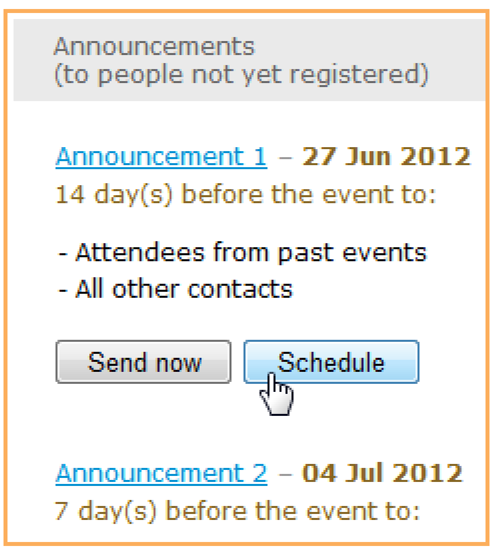
You can schedule the automatic delivery of event announcements, and choose the recipients. Schedule an event announcement involves specifying the number of days before the event to send the email, instead of a specific date. In that way, if the date of the event changes, you don't have to adjust your email schedule.

> You can only schedule the day of delivery, not the time. The time of delivery typically corresponds to the starting time of the event.

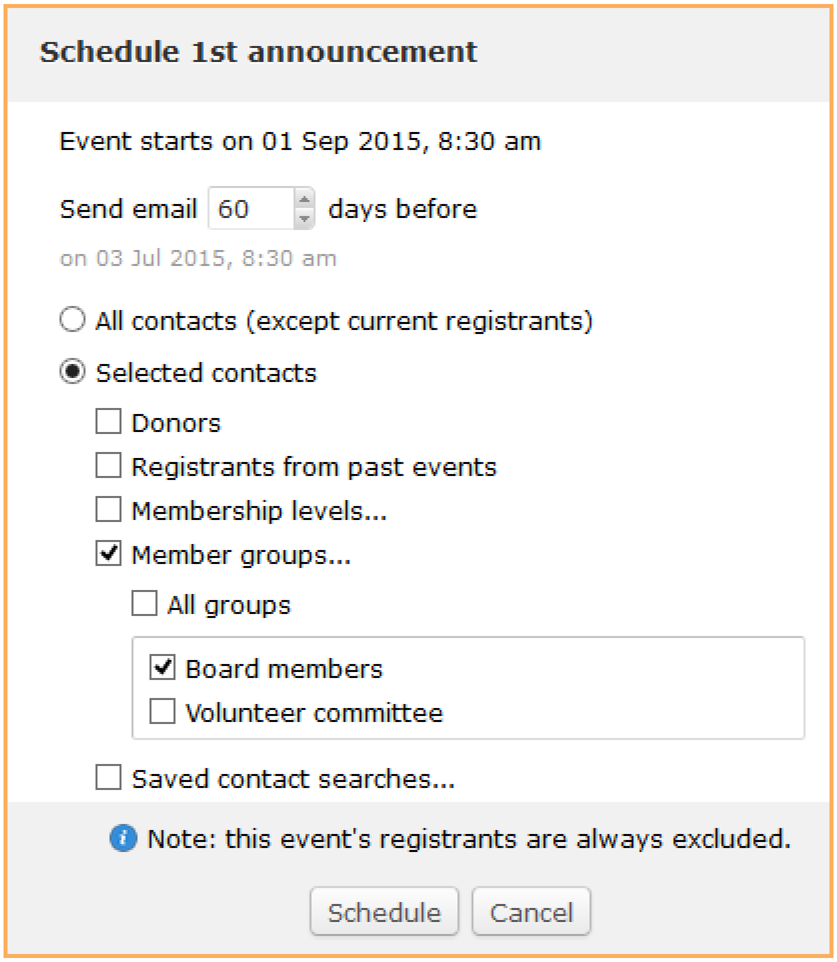
To schedule an event announcement, follow these steps:

Read more/less

1. Click the **Schedule** button below the announcement number (e.g. **Announcement 1**)



2. From the window that appears, enter the number of days in advance of the event you want to send the email.
3. Select the recipients for the email.



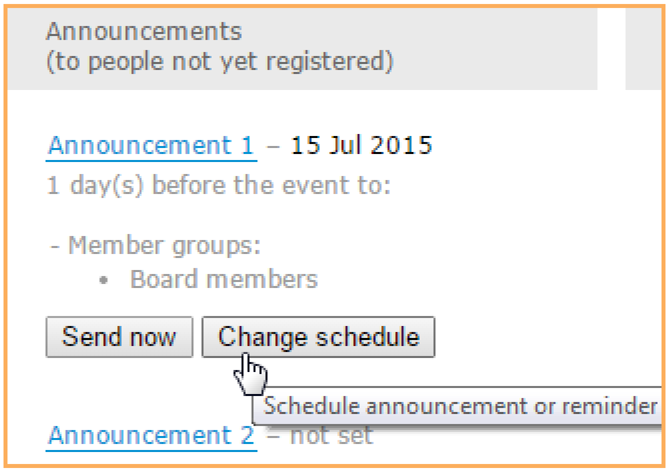
You can choose **All contacts** or any combination of:

- Members
- Donors
- Registrants from past events
- Selected membership levels
- Selected member groups
- Saved contact searches
- Saved member searches
- Contacts without membership, registrations, or donations

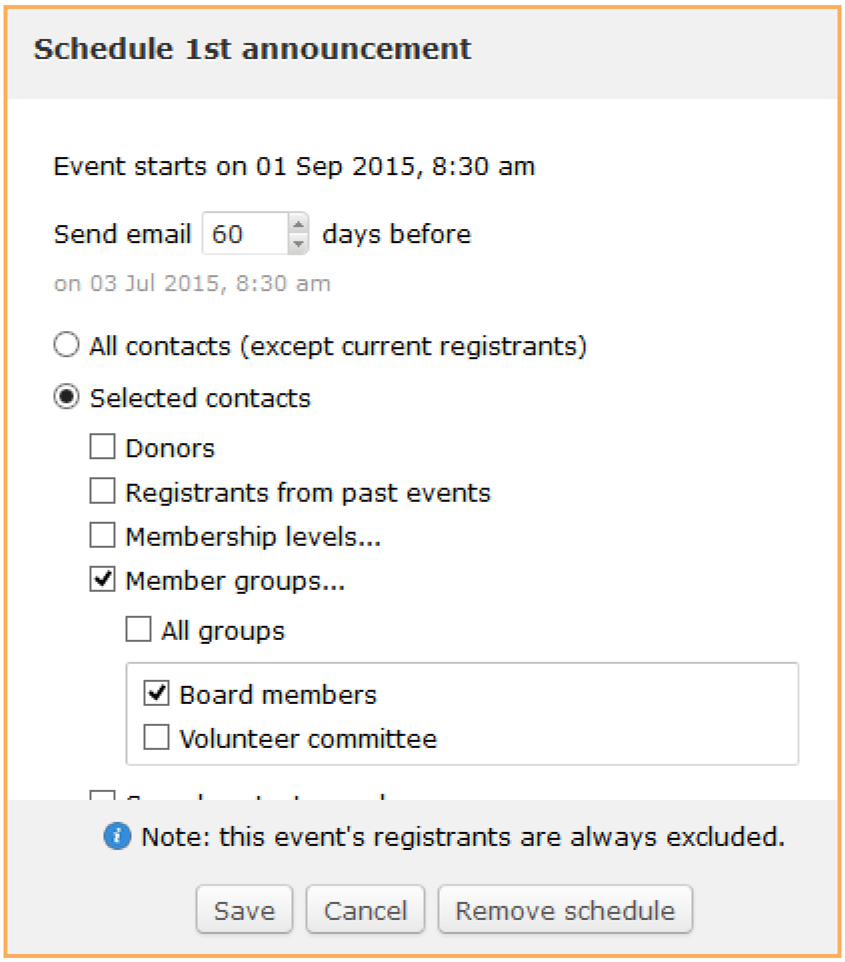
> ⚠ If you choose members to receive event announcement, they will receive them even if the event is not open to their membership level. For example, if the registration types for an event are only available for members at a Gold level, all members will receive the event emails whether or not they are Gold members.

4. Click the **Schedule** button.

Once you save the schedule by clicking the **Schedule** button within the dialog, the **Schedule** button for the announcement becomes **Cha nge schedule**.



To modify or remove the schedule, click the **Change schedule** button. From the dialog that appears, you can modify the schedule and click the **Save** button to save your changes, or click **Remove schedule** to unschedule the email.



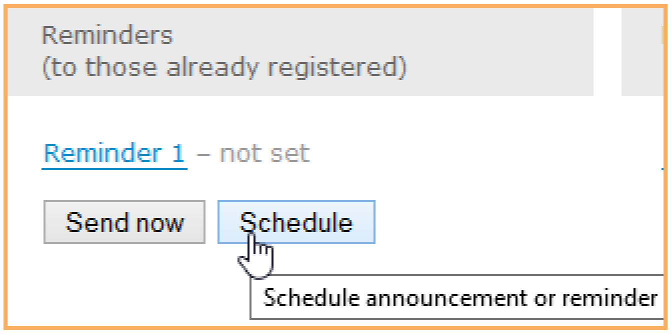
Scheduling event reminders

You can control when event reminders are sent, but you cannot select the recipients. Reminders go to all event registrants, including guests.

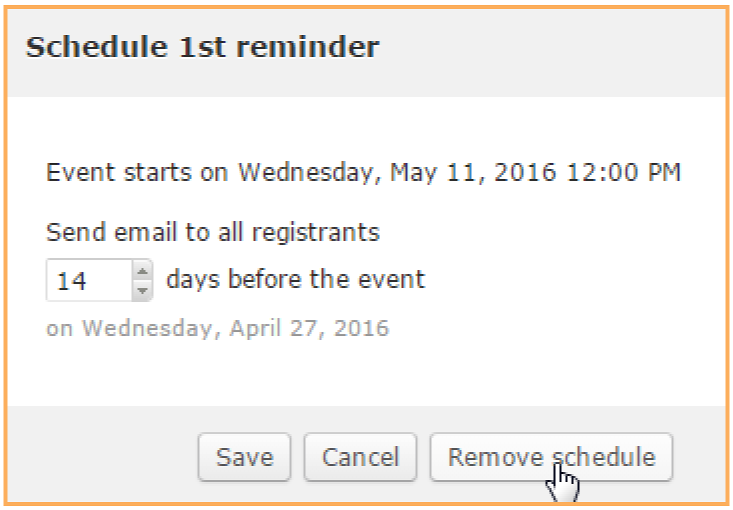
To schedule an event reminder, follow these steps:

Read more/less

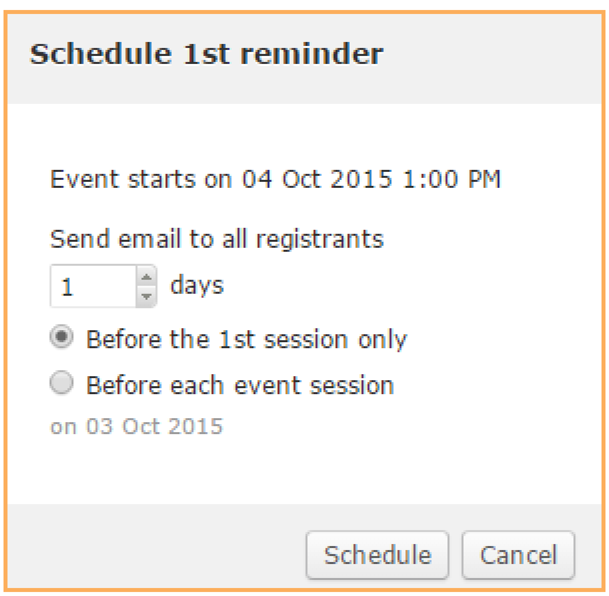
1. Click the **Schedule** button below the reminder number (e.g. **Reminder 1**)



2. From the window that appears, enter the number of days in advance of the event you want to send the reminder then click the **S chedule** button.



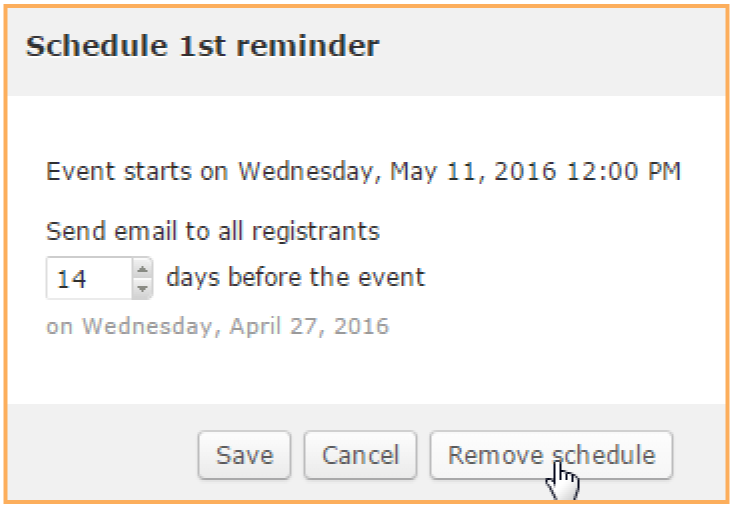
For multi-session events, you can choose whether to send before each event session, or just before the first session.



3. Click the **Save** button.

The **Schedule** button for the reminder now becomes a **Change schedule** button.

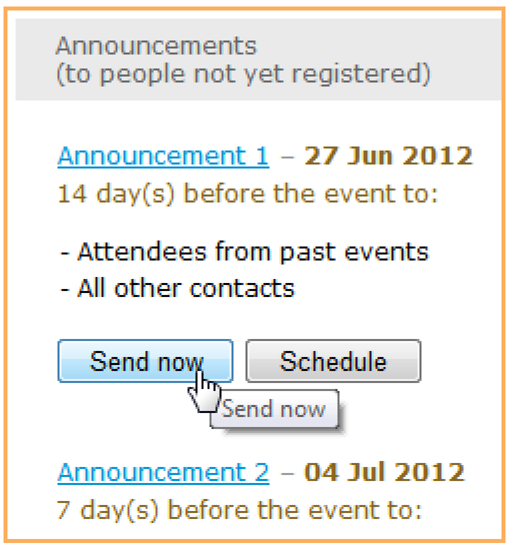
To modify or remove the schedule, click the **Change schedule** button. From the dialog that appears, you can modify the schedule and click the **Save** button to save your changes, or click the **Remove schedule** to unschedule the email.



Sending an announcement or reminder immediately

You can choose to send any announcement or reminder at any time. To send an announcement or reminder immediately, go to the **Emails** p age for the event then click the **Send Now** button.

Read more/less

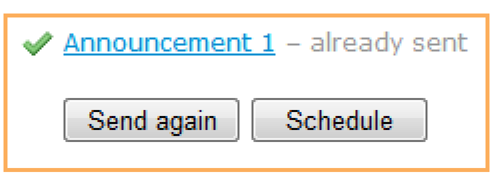


If you don't see the **Send now** button, it is because you are in edit mode. Click **Save** or **Cancel** to exit edit mode.

For announcements, a dialog will appear where you can select the email recipients. The recipients will default to all contacts (except current registrants) even if you've already scheduled the announcement with a different set of recipients.

Once you send your email, it is added to the email queue, and may take anywhere from a few minutes to a few hours to be actually delivered.

After an event email has been sent, all your scheduling and recipient settings for that event will be reset, and the **Send now** button will change to **Send again**. Also, a check mark will appear beside an email.



Clicking the **Send again** button will immediately add the email to the queue. You can modify the email before sending it again by clicking the link for that email.

Choosing recipients for registration emails

For registration confirmed and registration pending emails, you can choose whether to send them to the registrant, the registrant's guests, and/or the event organizer.

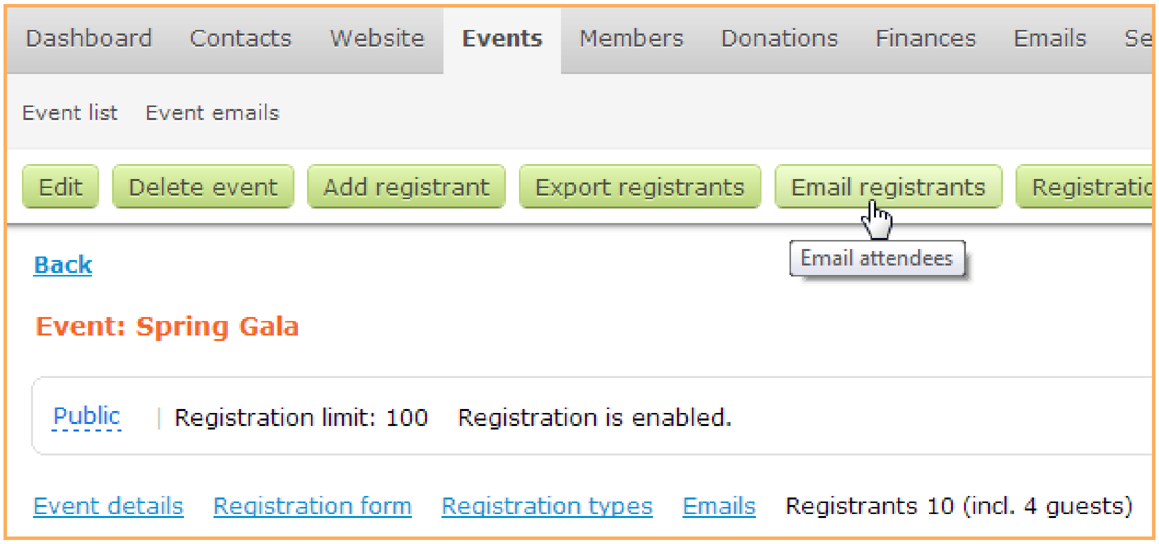
Registration pending emails are not sent in the case of free events. The registration confirmation email is only sent after the event registration fee is fully paid.

For new waitlist registration emails, you can choose whether to send them to the waitlist registrant and/or event organizer.

Emailing event registrants

While viewing the list of registrants, you can send an email blast to all of them – including guests – by clicking the **Email registrants** button.

Read more/less



You can create your email blasts from scratch or use one of the professionally designed email templates provided by Wild Apricot. In either case, you can add text, formatting, graphics, and links to the message. To personalize the message, you can use macros to insert specific information such as the recipient's first name or organization.

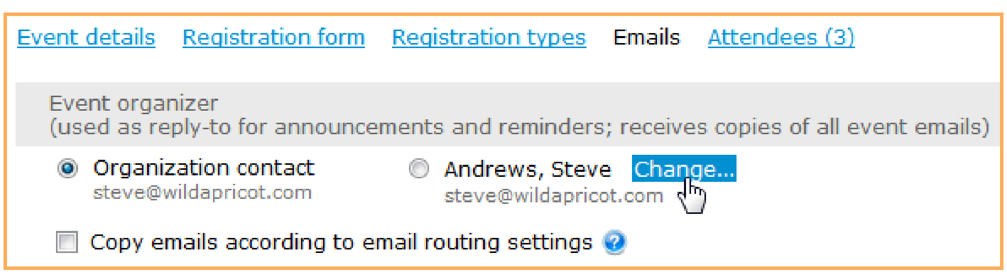
After you've sent your email blast, you can track opened, clicked, and undelivered mail, and review email failures. For more information, see Sending email blasts.

> Guest registrants receiving the email blast will be unable to use the **Unsubscribe** link to unsubscribe from future emails since they have not been added to your contact database.

Changing the event organizer

The event organizer receives all event-related administrative emails, as well as a copy of event announcements and reminders. If you want to monitor individual registrations, you can provide for the event organizer to also receive event registration notifications. (For more information, see Choosing email recipients). The event organizer will also be sent an email when the registration limit is reached for a particular event.

By default, the event organizer is the designated contact for your organization (see Organization details). If you want to change the event organizer to someone else, click the **Change** link.



If you want to send copies of event emails to multiple recipients – rather than a single event organizer – you could designate a contact representing an email group as the event organizer, with the email group's address as the contact address.

Routing event emails

You can also choose to send copies of event emails to other recipients (such as the event manager) according to your routing settings. If you want to route event emails, check the **Copy emails according to email routing settings** box. If this option is not selected, then your routing settings will be ignored for emails concerning this event.

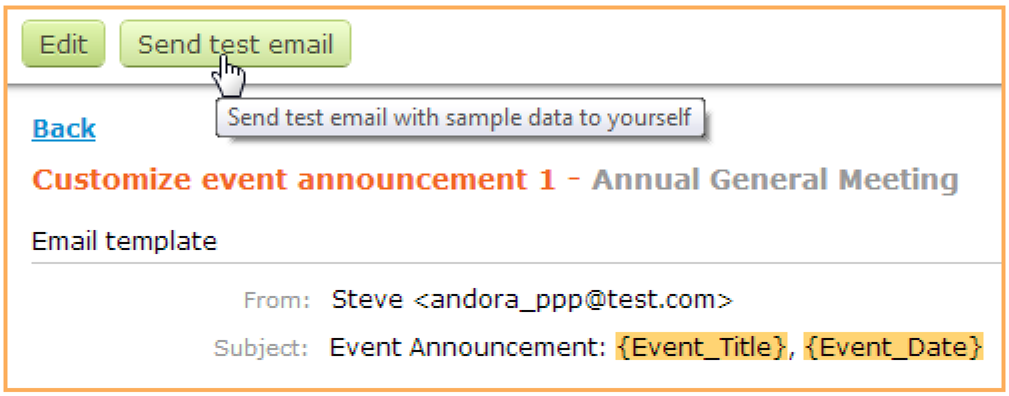
After you has chosen the recipients for each email, click **Save**.

Sending a test email

To send a test email to yourself, follow these steps:

Read more/less

1. From the **Emails** page for the event, click the email you want to send (e.g. **Announcement 1**).
2. Click **Test email**.



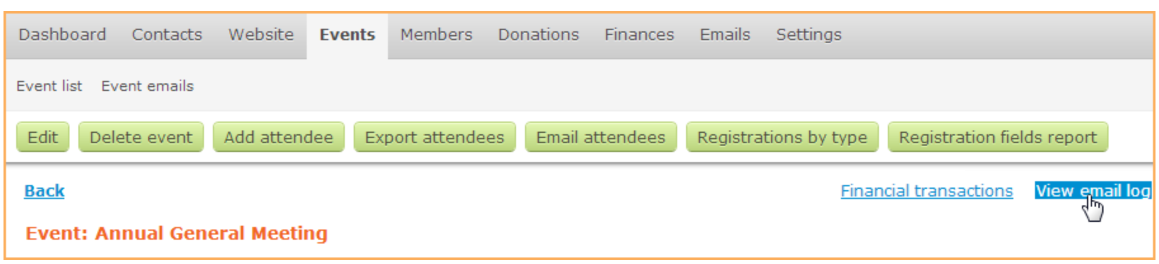
The test email will be sent to the email for your Wild Apricot account, not to the event organizer or the organization contact.

> Test emails use fake data in place of macros, not the actual data from your database. So, don't be alarmed if you see some unfamiliar content in the test message.

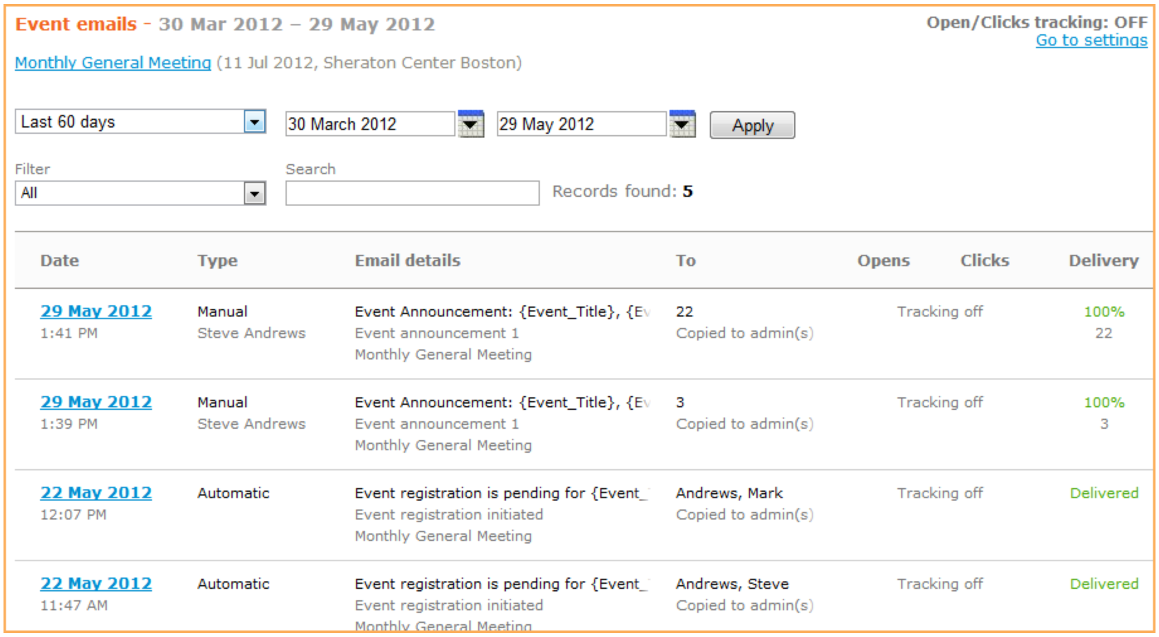
Tracking event emails

To view a summary of event emails for a particular event, go to the **Emails** page for that event then click the **View email log** link.

Read more/less



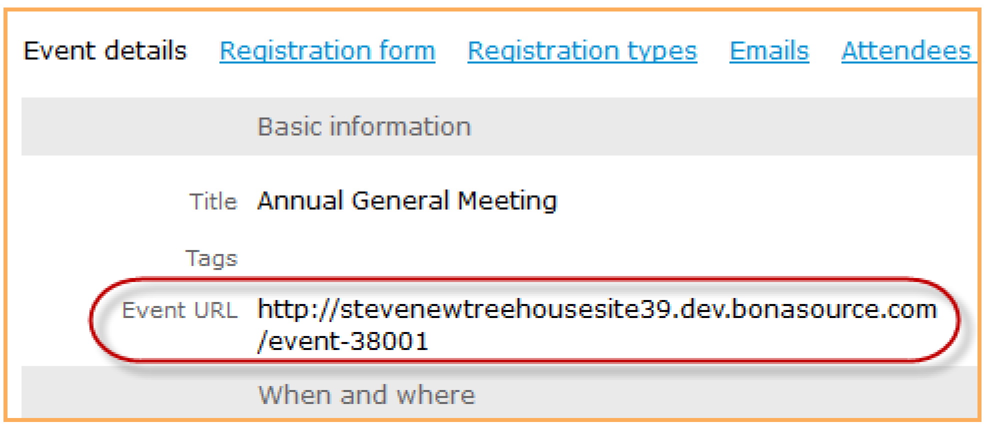
From the email log, you can view a summary of the emails for this event, including the number of recipients, failures, opens, and clicks.



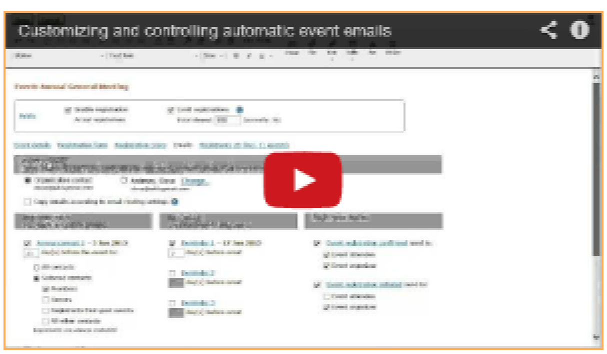
For each email, you view more details, including the failed and delivered email addresses, and the number of clicks for each link. For more information, see Log of sent emails.

Emailing links to specific events

You can insert or email a link to the details for a specific event. The URL for the event appears in the **Event URL** field on the **Event details** ta b for the event.



You can copy the URL and paste it as a link within an email or site page.



Video: Controlling and customizing event emails 2:55

On this page:

Expand all sections

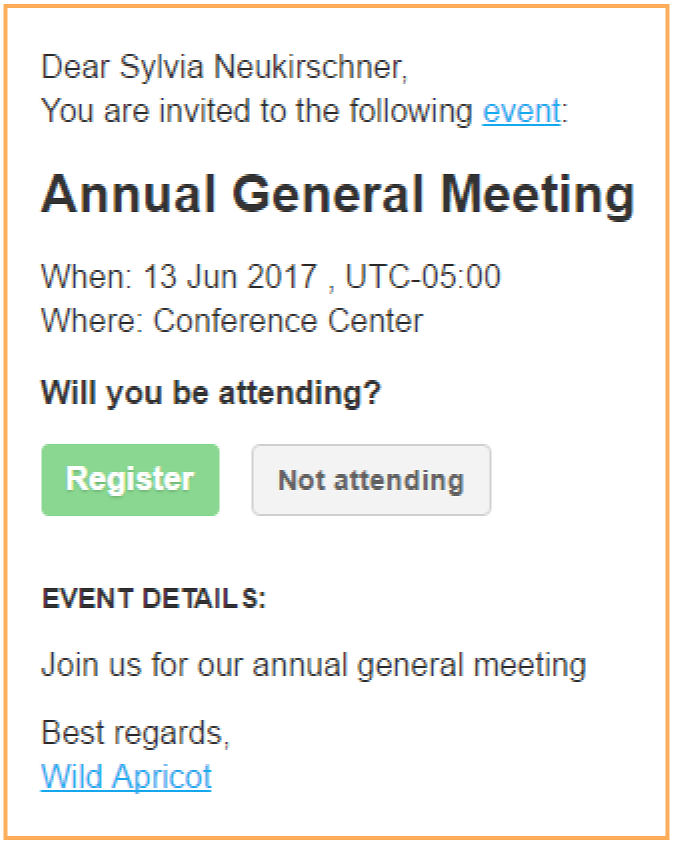
See also:

- Automatic emails schedule
- Log of sent emails
- Using macros in emails
- Custom domain setup

Providing a Not attending option

Providing a Not attending option

You can include a macro in your event announcement to display a **Not attending** button – along with a **Register** button – so that invitees can exclude themselves from future announcements for the current event.

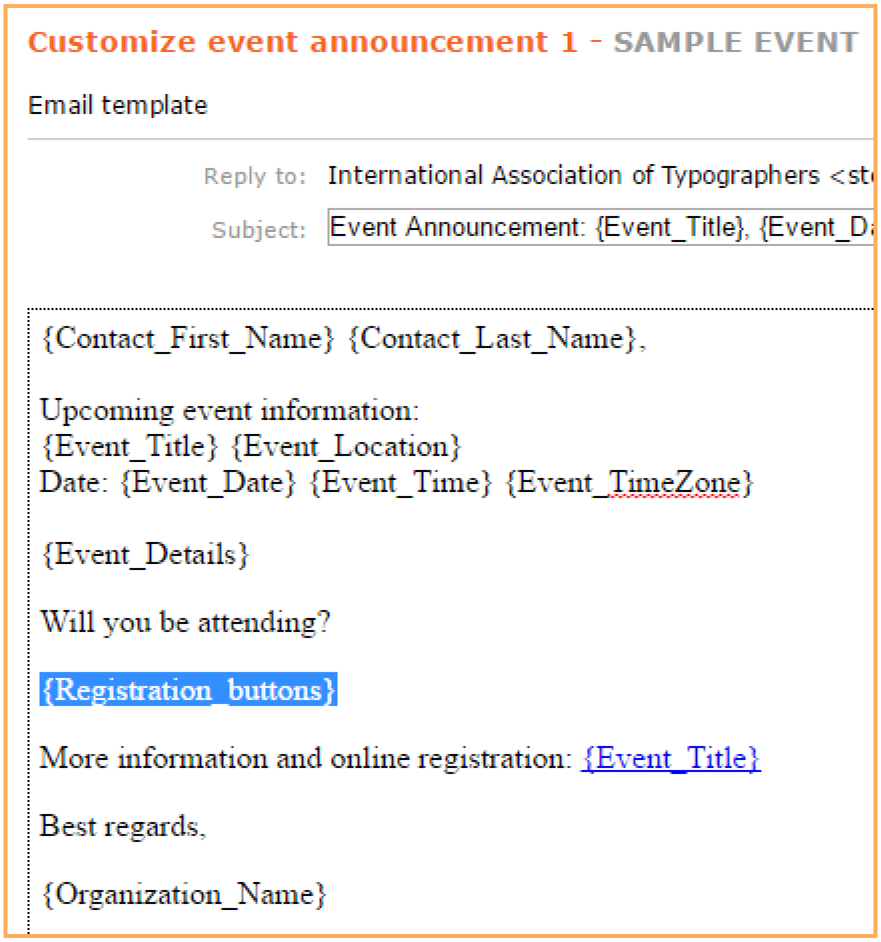


SHOW ME (2:22)

Displaying the registration buttons

To display the **Register** and **Not attending** buttons, you insert the {Registration buttons} macro into your event announcement email or email template.

Read more/less



The {Registration buttons} macro is only available for event announcements, not for event reminders.

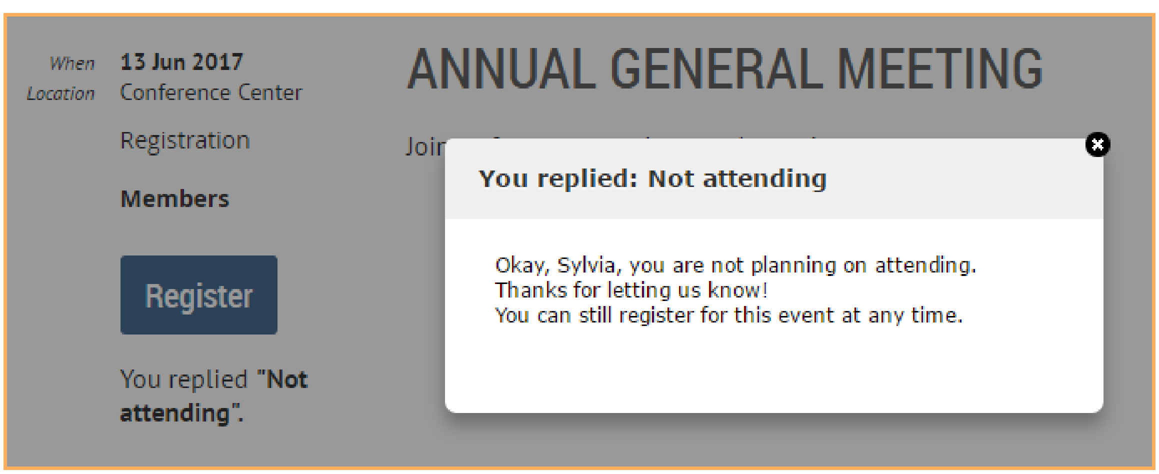
If you haven't customized your default announcement templates, the {Registration buttons} macro will be automatically included in event announcements for new events.

Emails that contain the {Registration buttons} macro will appear on the **Emails** tab with the phrase *Response requested* below the email link.

Using the registration buttons

When an invitee clicks the **Not attending** button within the email message, they will be automatically logged in to your site and taken to the event details, where a confirmation message will appear.

Read more/less

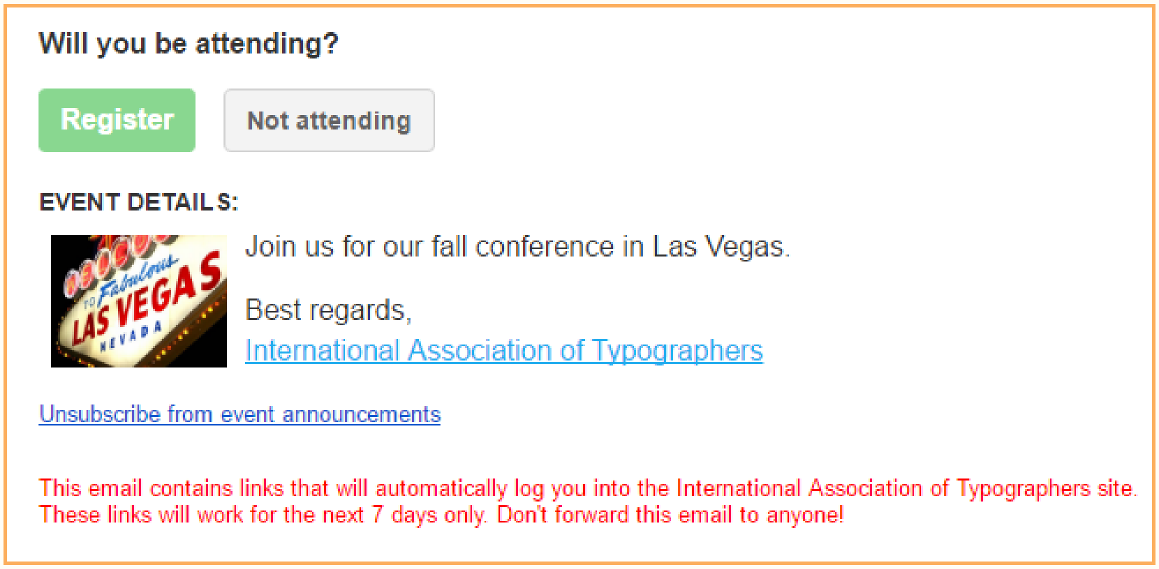


Recipients will logged onto your site using secure *https* access. If your site is using a custom domain as your primary domain without a security certificate installed, the browser will display a security warning. To avoid this warning, you can get a security certificate installed, or set your wildapricot.org domain as your primary domain.

Invitees who click the **Not attending** button will be automatically unsubscribed from all further announcements for this event. If they change their mind, they can register for the event at any time by clicking the **Register** button from the email or your event calendar.

If the invitee clicks the **Register** button within the email message, they will be logged in and taken to the registration form for the event.

Since clicking the buttons in the email will automatically log the person in, your recipients should not forward or otherwise share this email. A warning to this effect appears at the bottom of the email message, just below the Unsubscribe link.



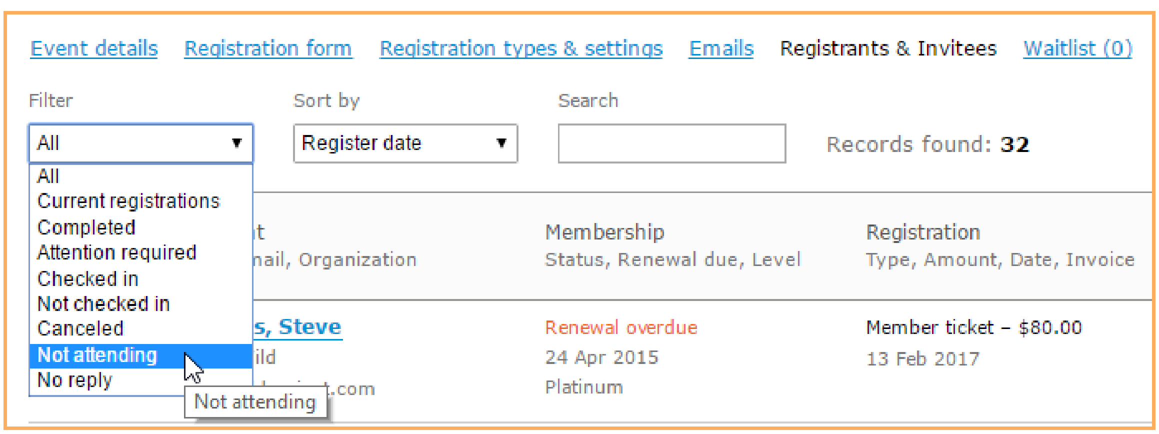
This warning cannot be moved or customized.

Viewing invitees' responses

To view your invitees' responses, go to the **Registrants & invitees** tab and click the **Filter** dropdown.

Read more/less

You can select the **Not attending** option to see which invitees are definitely not coming to your event, or the **No reply** option to see which invitees haven't responded either way.



If you select the **All** option, then all registrants and invitees will be displayed alphabetically in the following order: 1) registrants 2) invitees who are not attending 3) invitees who have not replied 4) cancelled registrants.

While you are on the **Registrants & invitees** tab, the **Email registrants** and **Export registrants** buttons will email and export the registrants and invitees currently listed.

> ⚠ Make sure the list of registrants and invitees is properly filtered before you click either of these buttons since the list can include non-registrants. On all other event tabs, these buttons will email and export only event registrants.

On this page:

- Displaying the registration buttons
- Using the registration buttons
- Viewing invitees' responses

Expand all sections

See also:

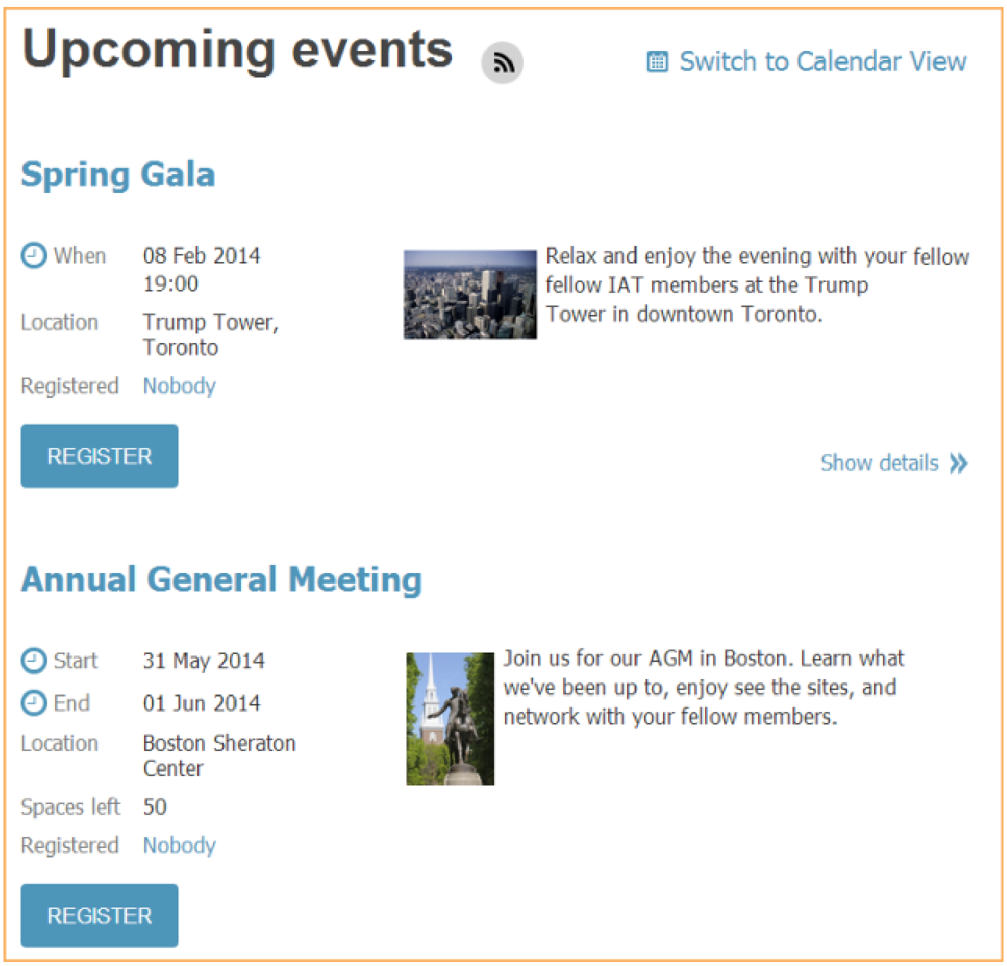
- Event emails

Publishing your event calendar

Publishing your event calendar

So that visitors to your site can see your events and register for them, you can add an event calendar to a page on your website – and restrict access to the page by membership level , member groups , or to administrators only. You can set up multiple event calendars, each displaying a different set of events (e.g. training vs. social events).

You can customize each event calendar by adding introductory text, choosing the default view, and controlling what type of events are included.



You can also control the visibility of individual events, so that only certain kinds of members – or only administrators – can see them.

Event calendars – like other site content – are inserted as gadgets, in this case, an event calendar gadget. You cannot add an event calendar gadget – or any other singular gadget – to a page template or system page.

You can also add an upcoming events gadget to display a list of upcoming events. Unlike an upcoming events gadget that lists only a limited number of upcoming events, the event calendar gadget can display all events, including past ones.

You can insert or email a link to a specific event by copying the **Event URL** within the event settings.

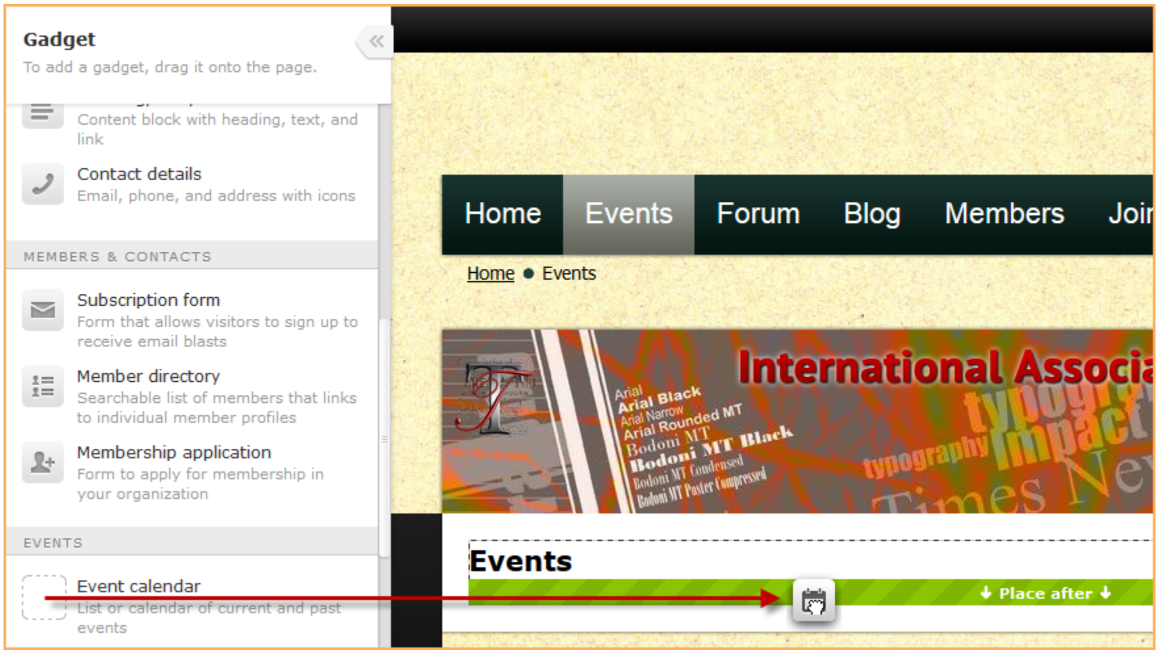
You can embed your Wild Apricot event calendar – or individual event details – into another website using widgets.

Adding an event calendar gadget

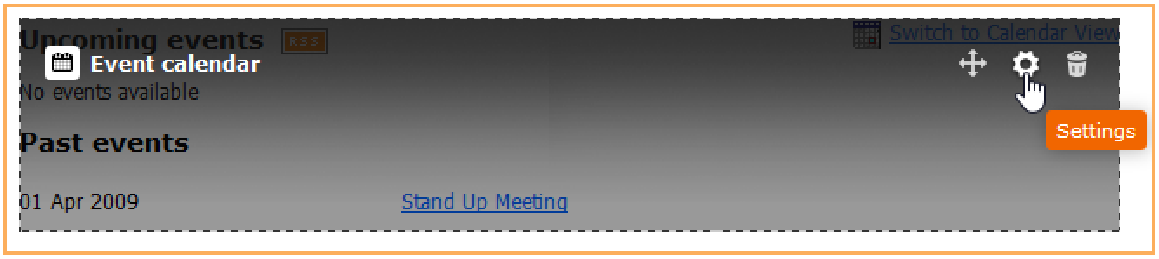
To add an event calendar gadget to a page, follow these steps:

Read more/less

1. Click **Sites pages** under the **Website** menu and create or begin editing the site page where you want the calendar to appear.
2. Click the **Gadget** list to display the list of available gadgets.
3. Drag the event calendar gadget from the list, and drop it where you want it to appear on the page. You can insert it into a cell within a layout, or above or below a layout.



   When a layout cell or placeholder is empty, a **Drop gadget or layout here** prompt will be displayed. When you drag a gadget over an empty layout cell or placeholder, it turns green, indicating that you can drop the gadget there. When you drag a gadget above or below a layout, a prompt will appear indicating that you can drop the gadget before or after the layout.
4. After you have dropped the gadget in the desired location, hover your pointer over it and click the **Settings** icon.



5. From the gadget settings panel on the left, choose the desired settings for the event calendar, including Among other things, you can choose which types of events are displayed, and which types of visitors can view the event calendar. For more information, see Adjusting event calendar settings (below).
6. Click **Save** to save the changes to the page.

For instructions on restricting access to the page, see Page access and visibility.

The event calendar page will now appear on your site, subject to any access restrictions you have set.

Adjusting event calendar settings

Now that you have added an event calendar gadget to a page, you can adjust the event calendar gadget settings. Within the gadget settings, you can control how events are displayed, and filter the calendar using event tags.

Gadget settings appear in a panel on the left side (which can be hidden to maximize the page design area). To display the settings panel, you position your pointer over the gadget – while editing a site page – then click the gadget settings icon.

You can modify the following settings for event calendar gadgets:
Read more/less

Setting	Description
Filter events by	You can filter the event calendar so that it displays only events with certain event tags. To filter the calendar, check only those event tags you want to include in the event calendar.
Show past events	Controls whether the calendar displays past events as well as upcoming events.
Show restricted events to public users	Choose whether to show events with restricted access to public visitors – those who are not signed in as members or administrators.
Show RSS icon	Controls whether an RSS icon appears on the event calendar beside each section title. By clicking on the RSS icon, visitors to your site can subscribe and be automatically notified of updates to the calendar in their RSS reader. If your event calendar appears on a page with restricted access, the RSS feed will not be accessible to your RSS reader.
Default view	Controls whether the events are displayed within a list or within a calendar.
Calendar scale	If you choose **Calendar** as the default view, you can choose whether the calendar displays the current week, month, or year.
Week starts on	If you choose **Calendar** as the default view, you can decide whether the week begins on Sunday or Monday.
Upcoming events section title	The heading for the upcoming events section.
Past events section title	The heading for the past events section.
Text to show when there are no events	Specify the text to be displayed if there are no events to display.
Margins	The amount of space – in pixels – that appears outside the gadget. You can set top, bottom, left, and right margins separately.
HTML ID	A unique identifier by which the gadget can be referenced within custom CSS or JavaScript code. The identifier is automatically generated but can be replaced with a more readable or memorable one (e.g. MyDonationGoalGadget).

CSS class	The name of a CSS class defined on the CSS customization scre en. You could, for example, enter the name *myClass*, where code similar to the following has been entered on the CSS customization screen:
	`.myClass .artBoxTitle {`
	`  font-family: georgia;`
	`  text-shadow: 1px 2px 1px rgba(0,0,0,0.6);`
	`}`

Inline style	CSS code to control the behavior or appearance of the gadget. For example, you could enter *width: 250px;* to control the gadget width.

Adding a title and description

You can add a title and description for your event calendar by inserting a content gadget ahead of the event calendar gadget. Within the content gadget, you can format the title and description using text styles. For more information, see Using the content editor.

Changing colors and fonts

You can change the colors and text styles used on your event calendar form from the Colors and styles screen. For a list of the elements you can change and the settings you choose to do so, see Colors and styles settings for event calendar gadgets. Any changes you make will be applied to other gadgets that use the same settings.

You can also color code different types of events on the calendar view of your event calendar using event tags. For more information, click here.

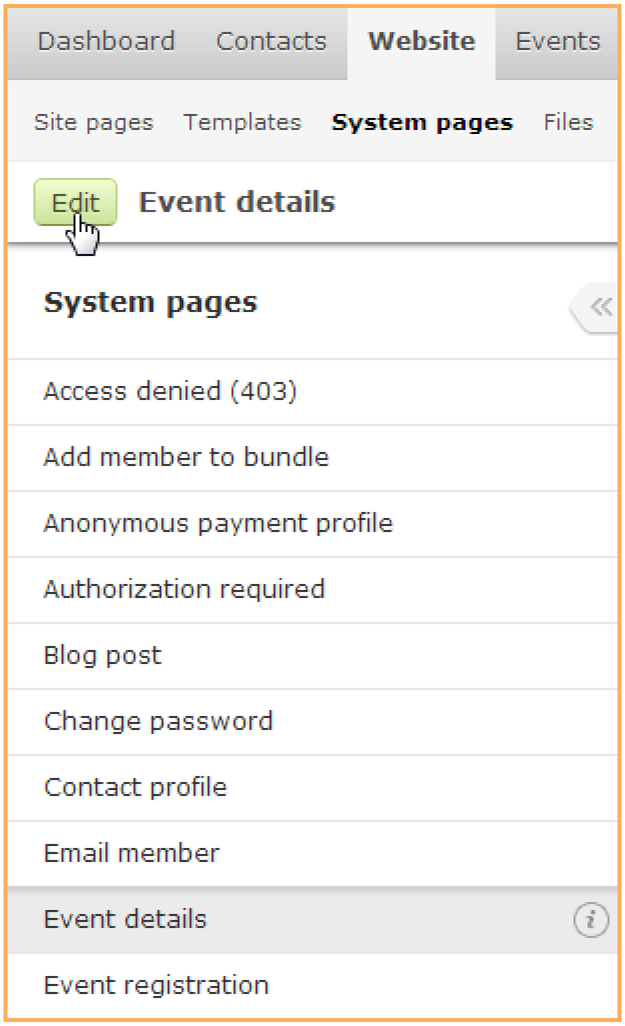
Customizing the event details system page

You customize the system page used to display individual event details. The event details page appears when a visitor clicks the **Show details** button within the event calendar.

To customize the event details system page, follow these steps:

Read more/less

1. Hover over the **Website** menu and select the **System pages** option.
2. Within the system page list, select **Event details**.
3. Click the **Edit** button.



Now, you can modify the system page in a number of ways. You can:

- Change the page template from the page settings on the left.
- Hover over the blue box – the system gadget that displays the actual event details – and click the **Settings** icon to display the settings for the system gadget.
- Click the **Gadget** or **Layout** drop-downs to insert gadgets and layouts above or below the system gadget.

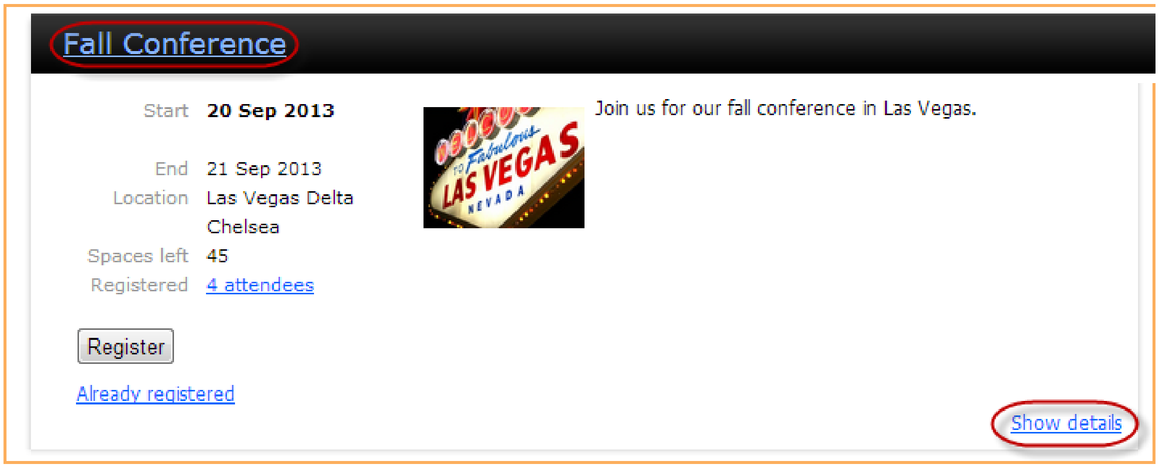
When you are finished modifying the event details system page, click the **Save** button.

Using the event calendar

A visitor to your site can view individual event details, change the calendar view, and subscribe to event calendar updates.

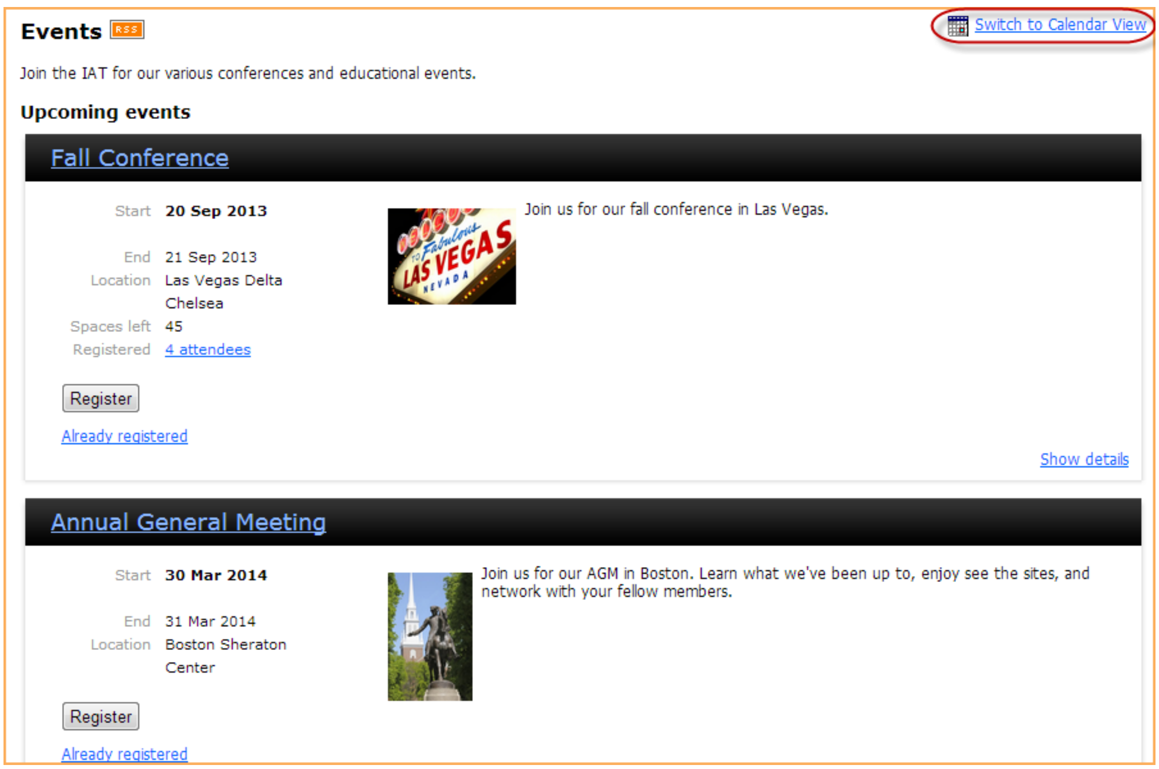
Viewing event details

To view details for a particular event, a visitor can either click the event title or the **Show details** link.

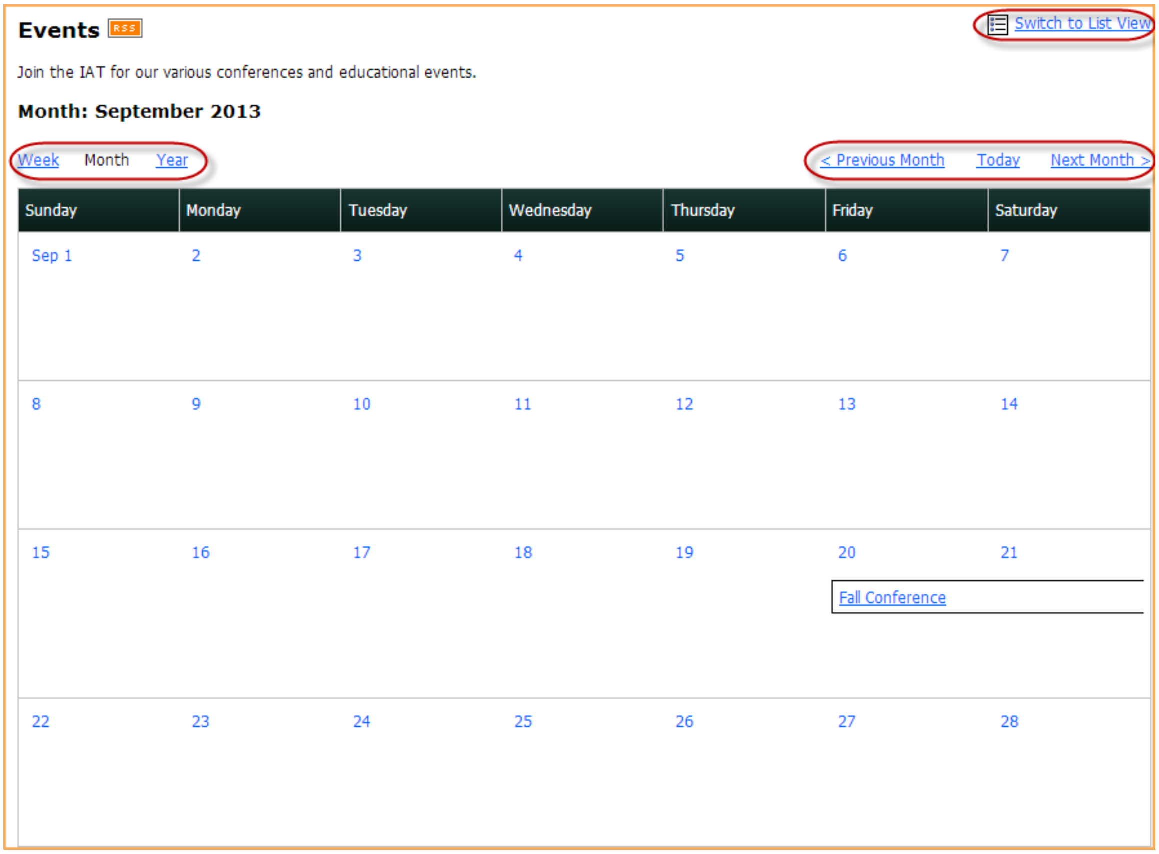


Switching between views

To switch from the list view of the event calendar page to the calendar view, a visitor clicks the **Switch to calendar view** link.

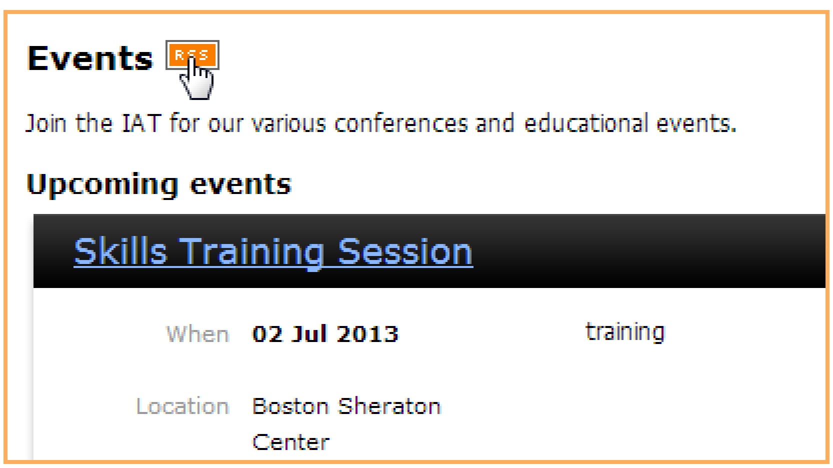


From the calendar view, the visitor can switch between – and scroll through – week, month, and year views, and switch back to list view by clicking the **Switch to list view** link.



Subscribing to event calendar updates

Unless you have disabled it within the event calendar gadget settings, an RSS icon will appear on each event calendar page.



By clicking on this icon, visitors to your site subscribe to your calendar and automatically receive updates through an RSS reader.

If your visitors are using Google Chrome, they may need to add a RSS subscription extension to their browser.

If you added your calendar to a restricted page, the RSS feed will not be accessible to any external reader software (as they cannot supply the appropriate username and password to access the RSS feed). A hidden calendar page can only be read within your site as a regular web page.

Troubleshooting

If an event does not appear on your event calendar, check the following:

- Check whether the event has been restricted to certain membership levels, member groups, or admin only
- Check whether the event calendar gadget has been set to filter events by event tags

On this page:

Expand all sections

See also:

- Event visibility
- Event tags
- Event calendar gadget
- Colors and styles settings for event calendar gadgets
- Event list widget
- Changing button labels

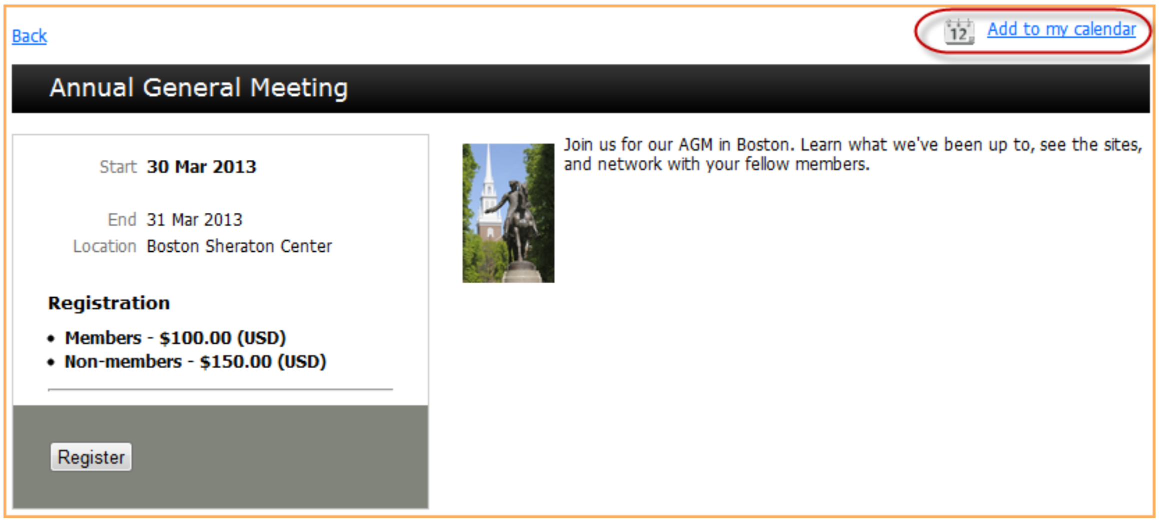
Adding an event to calendar programs

Adding an event to your calendar program

Any event in Wild Apricot can be added to calendar programs such as MS Outlook, Apple iCal, and Google Calendar.

SHOW ME – Google Calendar (1:25)

To add an event to your calendar, go to the event page in public view and open the event details. In the top-right corner of the event details, click **Add to my calendar**.



An .ICS (iCalendar) file will be generated containing the event details and a link to the event page. The file will be downloaded via your browser.

You can now import the downloaded .ICS file into most calendar programs, including MS Outlook, Apple iCal, and Google Calendar. Your calendar program will automatically use the timezone of the event to set the equivalent event time in your calendar.

Importing .ICS files into MS Outlook

To import the .ICS file into MS Outlook, follow these steps:

Read more/less

1. From your download folder, double click the .ICS file.
2. Click the **Open** button.
3. Enter any notes then click **Save and Close**.

or:

1. In Outlook, click the **File** menu or tab and select the **Open > Import** or **Import and Export** option (depending on your version of Outlook).
2. Select **Import an iCalendar (.ics) or vCalendar file (.vcs)** then click **Next**.
3. Find the downloaded .ICS file then click on **OK**.
4. Click **Import**.

Importing .ICS files into Apple iCal

To import the.ICS file into Apple iCal, follow these steps:

Read more/less

1. From your download folder, double click the .ICS file.
2. From the **Add Events** dialog that appears, select the calendar where you want the event to appear.
3. Click **OK**.

or:

1. Open iCal.
2. Click the **File** menu and select **Import**.
3. Find the downloaded .ICS file.
4. Click **Import**.
5. Select the calendar where you want the event to appear.
6. Click **OK**.

Importing .ICS files into Google Calendar

To import the .ICS file into Google Calendar, follow these steps:

Read more/less

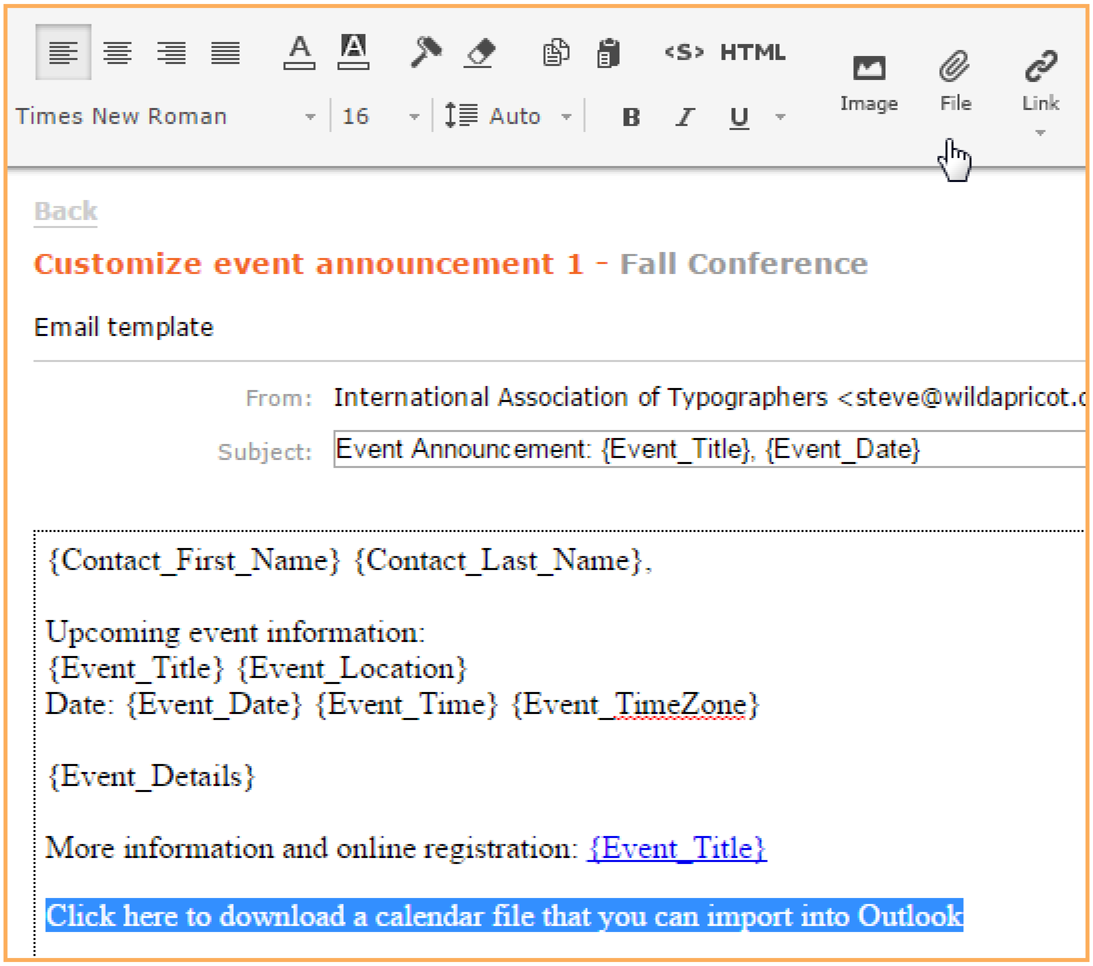
1. In Google Calendar, click the down-arrow next to **Other calendars**.
2. Select **Import calendar** from the menu that appears.
3. Click **Choose file** and find the downloaded .ICS file then click **Open**.
4. Select the Google Calendar where you'd like the event to appear, then click **Import**.

Emailing event calendar links

You can email a link to the event calendar file to event registrants as part of an event announcement or reminder, so they can easily add the event to their calendars. To email a link to an event calendar file, follow these steps:

Read more/less

1. Go to the public event page and open the event details.
2. In the top-right corner of the event details, click **Add to my calendar**. If prompted, save the .ICS file – containing the event details and a link to the event page – to your computer or network.
3. Go to admin view and select your event within the events list.
4. Click the **Events** tab.
5. Select the event announcement or reminder where you want the link to the .ICS file to appear.
6. Click the **Edit** button to begin editing the email.
7. Enter and select the text you want to use as the link text (e.g. "Click here to download a calendar file that you can import into Outlook or Google Calendar").
8. Within the content editor toolbar, click the **File** icon.



9. On the **Insert document** window that appears, click **Browse** and locate the .ICS file you downloaded.
10. Click the **Insert** button to insert a link to the file.
11. Click **Save** to save the changes to the email.

Troubleshooting

If the event time shown on your calendar does not match your event time, it may be due to timezone differences. Check that the event timezone specified in your Wild Apricot site is the same as the timezone on your computer or calendar. If you changed your timezone after your event had already been created, you need to go into the event and re-save it for the new timezone to take effect.

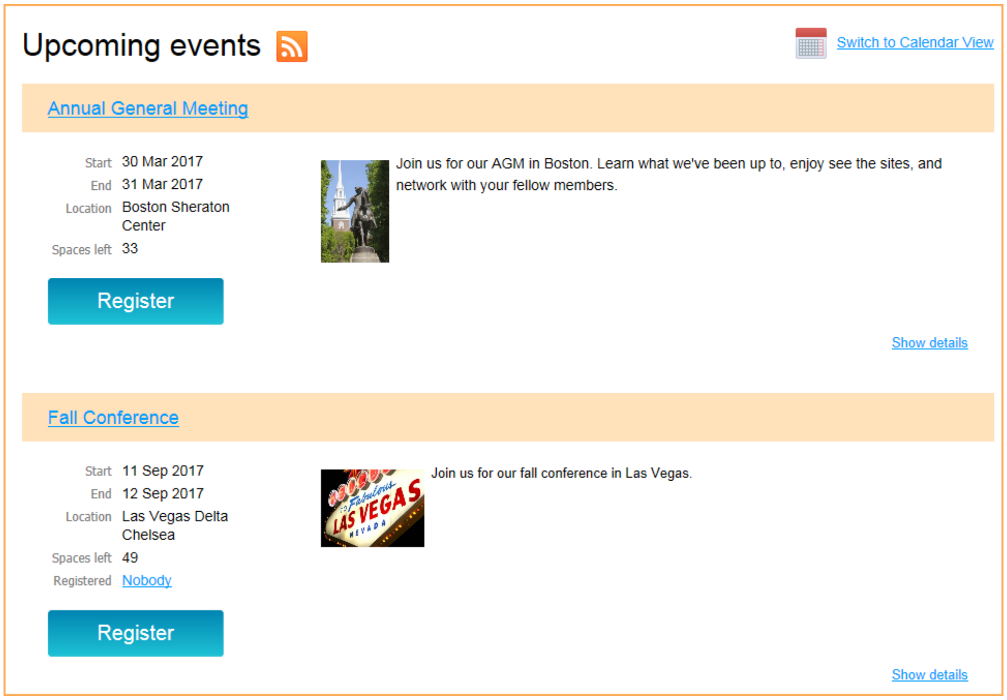
On this page:

Expand all sections

Self-service online event registration process

Self-service online event registration process

Once an event is set up and online registration is enabled, it will appear on your event calendar page in Wild Apricot, where your visitors to your site can view details and register for the event – from their computer or mobile device.

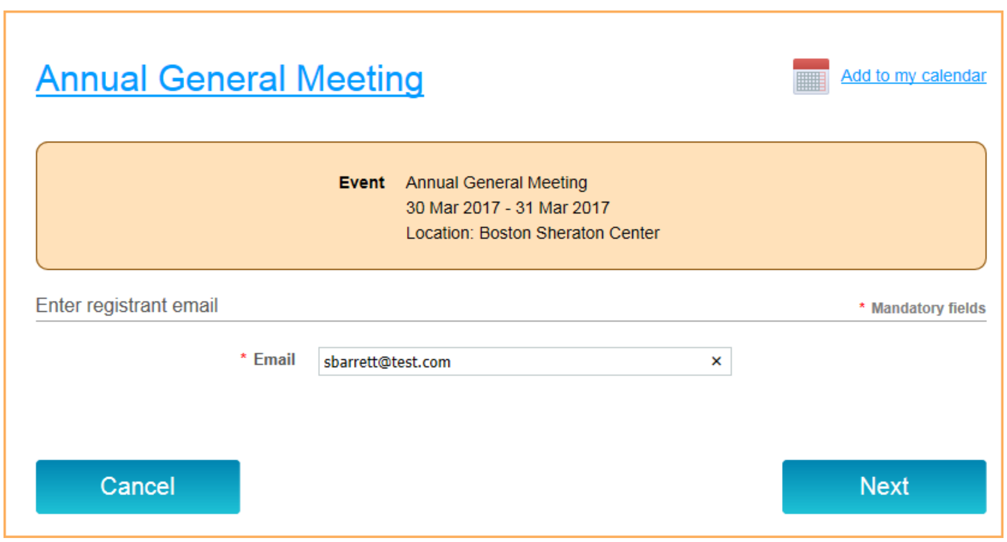


Online registration will be disabled once the event date has passed. However, administrators can manually register attendees after the event has taken place.

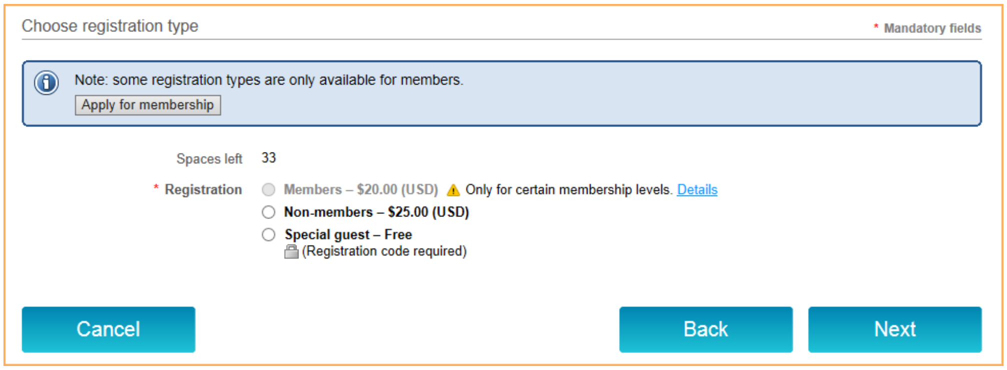
One person can register and pay for multiple attendees. To do so, return to the event registration page after confirming each registration but before paying. Whether a visitor can register multiple times under their own email address depends on the Disable multiple registrations for the same contact option that appears for each event on the **Registration types & settings** tab .

When visitors to your site click the **Register** button for an event, the following steps take place:

1. First, they will be asked to enter their email address. If they are already logged in, their email will already be filled in (though they can change it, to register another person).



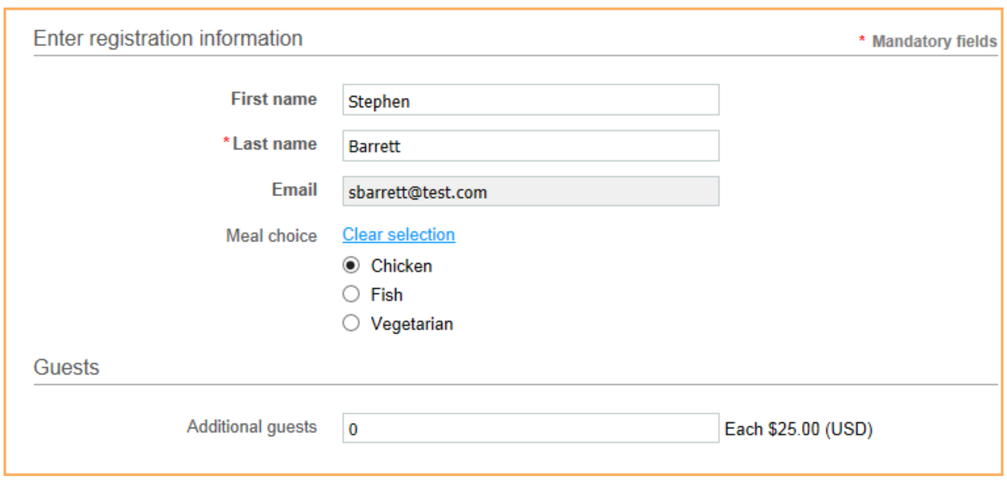
2. If there are multiple registration types, they will then be asked to select a registration type.



Depending on whether they are logged on or not, some member-only registration types may not be available. If they are not logged in, but their email is stored in your contact database, they will be prompted to log in. If their email is not stored in your contact database, they will be prompted to apply for membership.

If the event registration was set up with restrictions and is not thereby available to the registrant, Wild Apricot will display a message that registration is not available.

3. Once they select a registration type and click **Next**, the main registration form appears.



Here, they fill out the registration form, and select additional event options, if any (e.g. meal preference, event sessions). If the event is set up with a guest registration option, the registrant will be able to add or indicate the number of guests.

4. Once they complete the form and click **Next**, the event record is created.
5. What happens next depends on the payment method chosen when the event was set up.
    - If only offline payment was enabled, then the registrant will have the option of cancelling or confirming the registration. If the registrant clicks the **Confirm** button, an invoice will be emailed to them, and a registration summary will be displayed. From the registration summary, the registrant can choose to view or pay the outstanding invoice.
    - If only online payment is enabled, then a **Pay online** button will appear. Clicking the **Pay online** button will take the registrant to the online payment screen for your site's payment provider.
    - If both online and offline payment is enabled, then two buttons will be displayed: **Pay online** and **Invoice me**. Clicking the **P ay online** button will take the registrant to the online payment screen for your payment provider. Clicking the **Invoice me** but ton will result in the registrant being emailed an invoice – which they can pay online or offline – and a registration summary being displayed. From the registration summary, the registrant can choose to view or pay (online) the outstanding invoice.

> When paying using PayPal Payments Pro, the **Pay online** button with be replaced with two buttons: **Pay with credit card**, and **Pay Pal Express checkout**.

When someone who is not in your database registers for an event, they are added as a contact to your database, and an email will be automatically sent to them with their password and other login information. If they then apply for membership, they will be prompted to log in before processing with the application process. Whether guests are automatically added to your contact database depends on the **Guest registration** setting that appears within the event details for each event.

See also:

- Adding an event to calendar programs
- View account history and pay invoices

Registering and paying for another contact

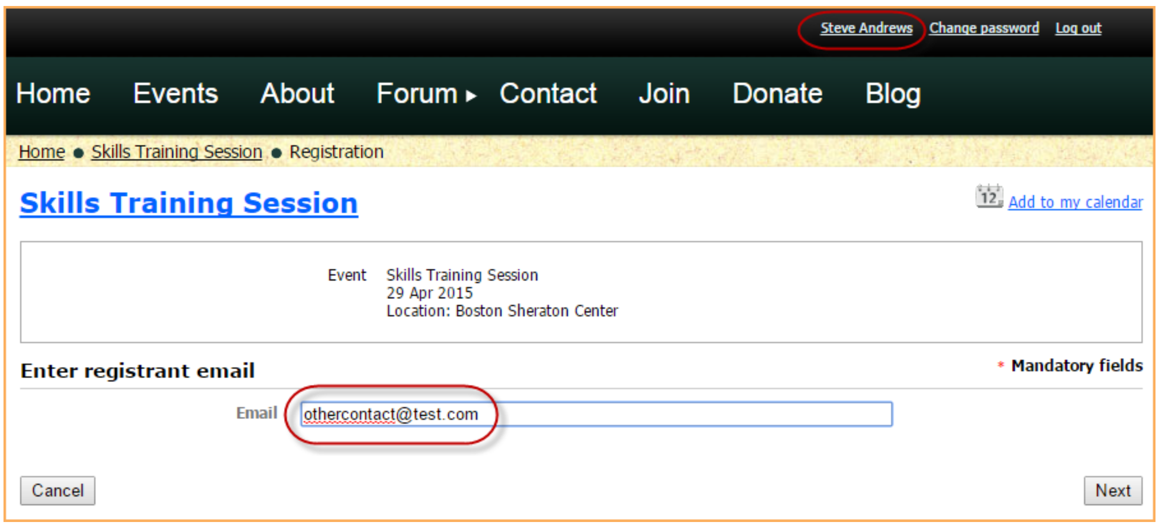
Registering and paying for another contact

A contact can register another contact for an event, and pay the event registration for the other contact. As well, an administrator can change which contact is invoiced for an event registration so that one contact is registered for the event and a different contact is invoiced for the registration fee.

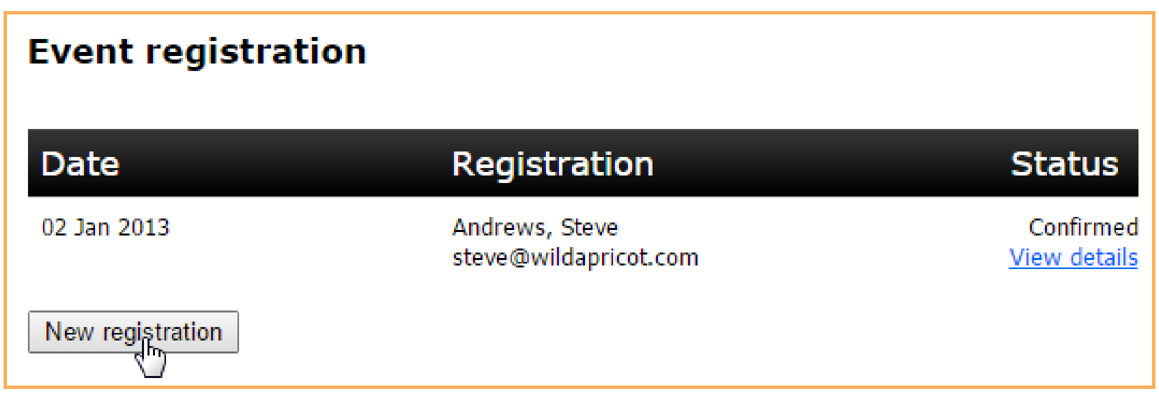
Why would I want to do this?
Maybe you're hosting an educational event for which scholarships are awarded to deserving students by a charitable foundation. You want the students to be registered for the event, but the foundation to be invoiced for the registration fees.

Registering another contact through online self-service

A contact can register another contact for an event by logging in then entering the other contact's email address during the registration process.



If the contact doing the registration is already registered for an event, they can click the **New registration** button after clicking the **Register** b utton from the event details.

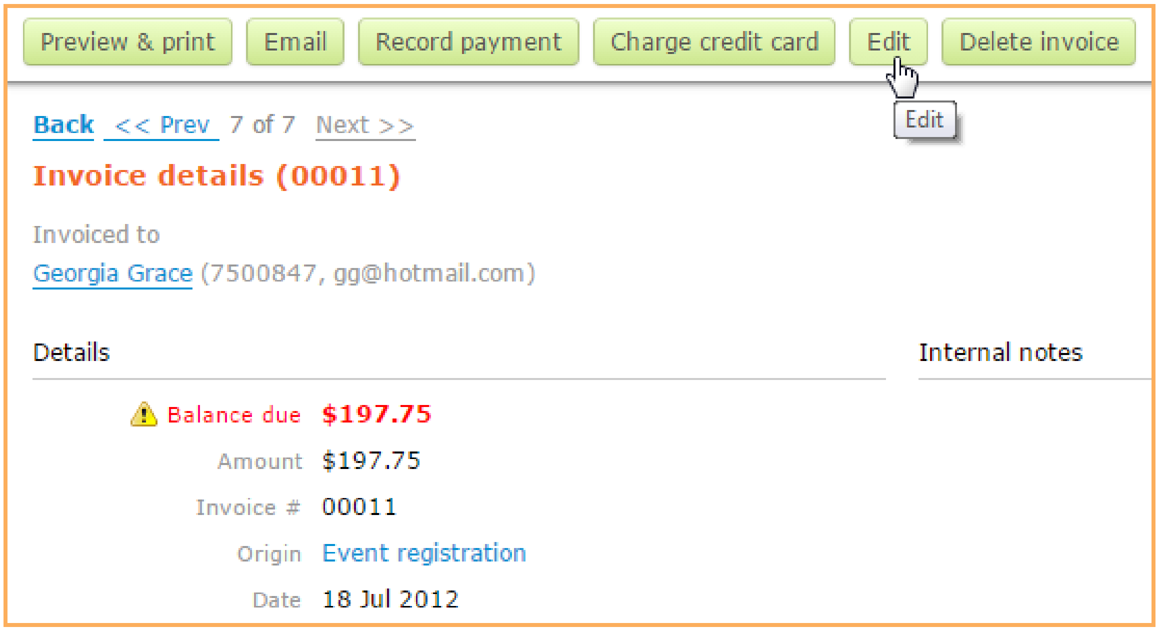


In either case, the contact doing the registering will be invoiced for the registration fee.

Changing who is invoiced for an event registration

After a contact has registered for an event, an administrator can assign the invoice to a different contact. To change who is invoiced for an event registration, follow these steps:

1. Find and open the invoice.
2. Click the **Edit** button to enter edit mode.



3. Click the **Change** link beside the contact's details.

4. Select the contact you want the invoice to be assigned to.
5. Click the **Save** button to save the change. You can then print or email the updated invoice.

Reassigning the invoice will create an entry in the audit log.

On this page:

- Registering another contact through online self-service
- Changing who is invoiced for an event registration

Adding event registrants manually

Adding event registrants manually

Visitors to your Wild Apricot site can sign up for events using an online event registration form. Administrators can also register event attendees manually, in cases where someone has called in, mailed, or faxed their registration information.

> ⚠ Online payments are not available for manual event registrations, though administrators can process credit card payments.

An administrator can manually record an event registration either from the event setup page, or from a contact's record. In either case, you will be asked to choose whether to generate an invoice or activate without an invoice.

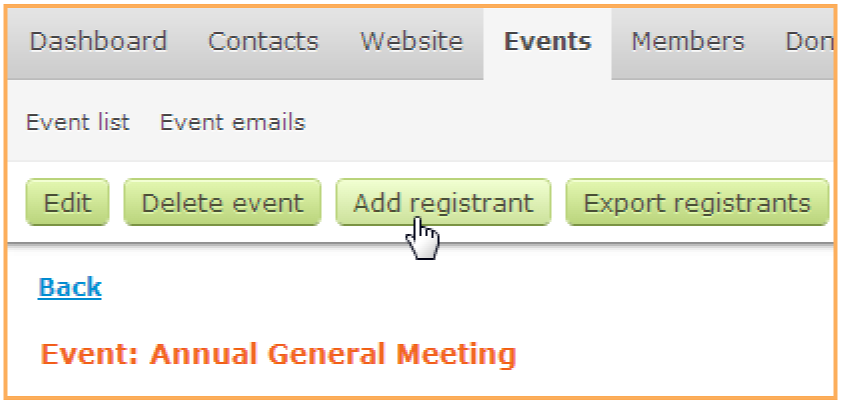
Administrators can manually register additional event attendees even after the event registration limit is reached.

Registering from an event page

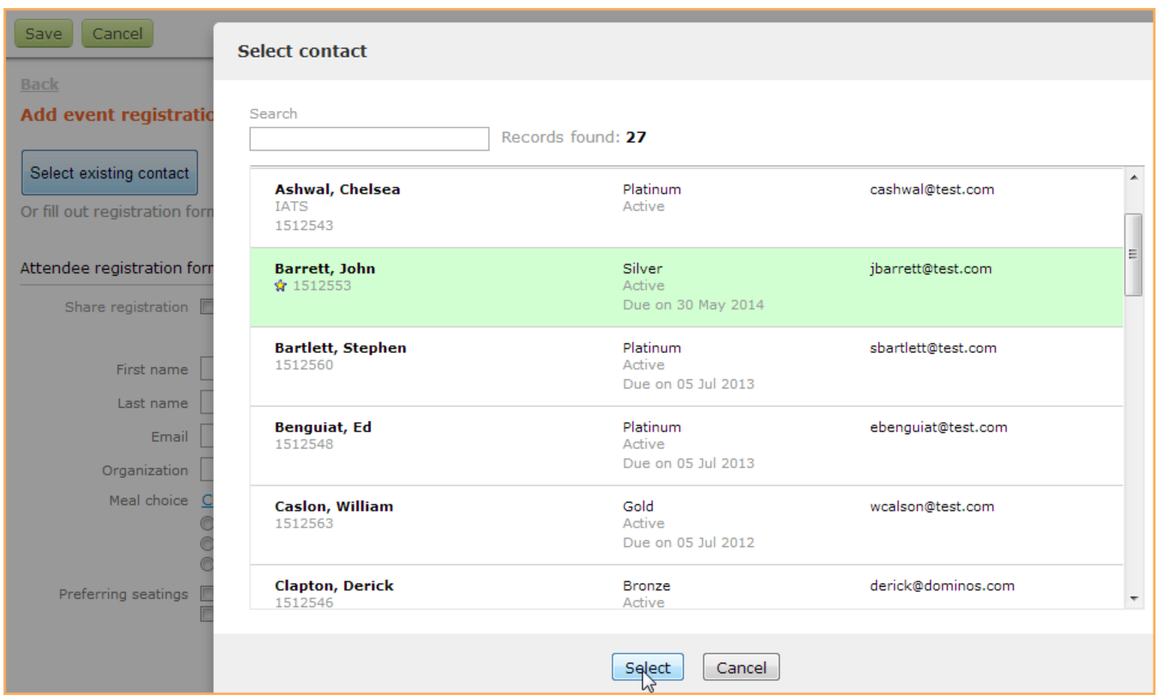
To register a member or other contact from the event setup page, follow these steps:

Read more/less

1. Hover over the **Events** menu and select the **Event list** option.
2. Click the event within the list.
3. From the event details screen, click the **Add registrant** button.

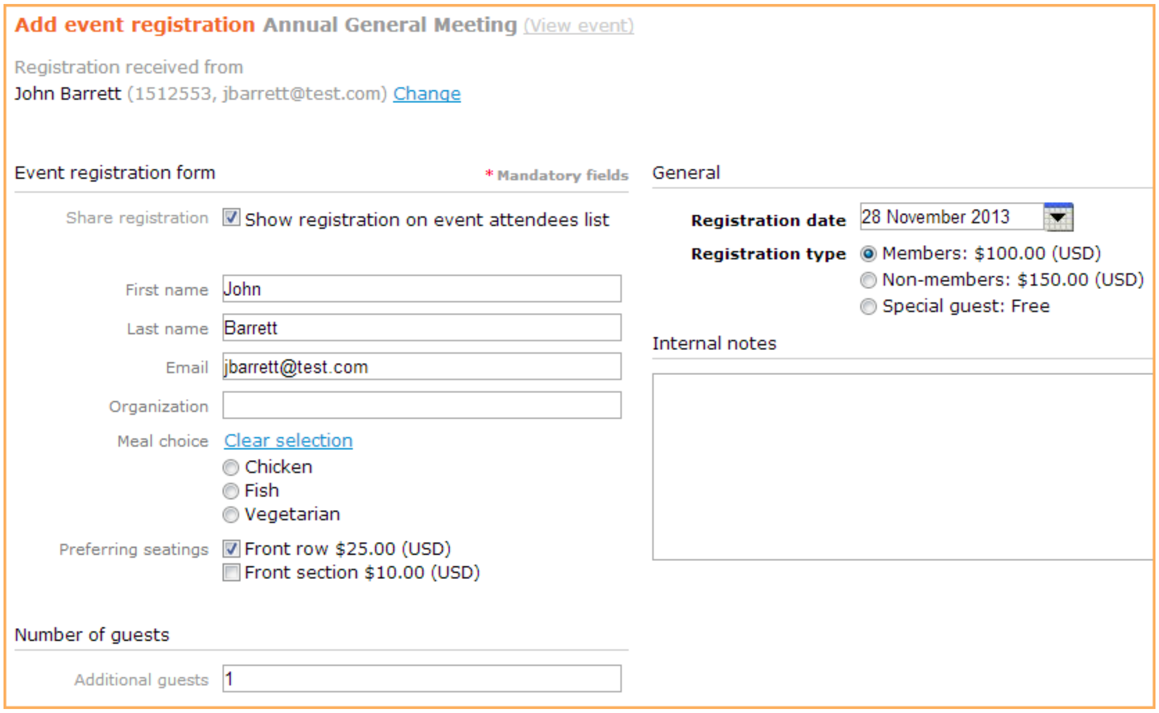


4. If you want to register an existing contact, click the **Select existing contact** button then choose a contact from your database and click the **Select** button.



Otherwise enter the information for the contact in the fields provided.

5. Select the registration type, complete the registration form, and choose from any of the available event options.



⚠ Any common fields set to **administrator use only** will appear on the form within admin view.

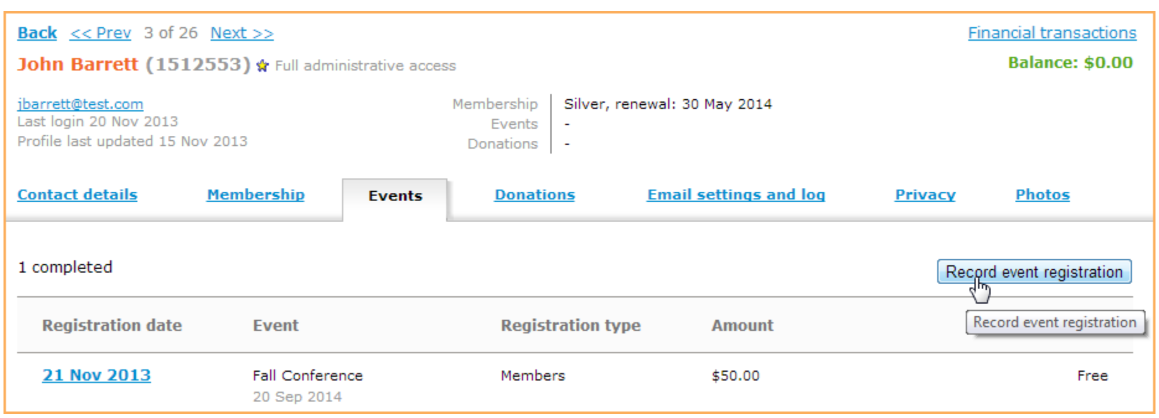
6. Click the **Save** button to save the registration.

Registering from a contact's record

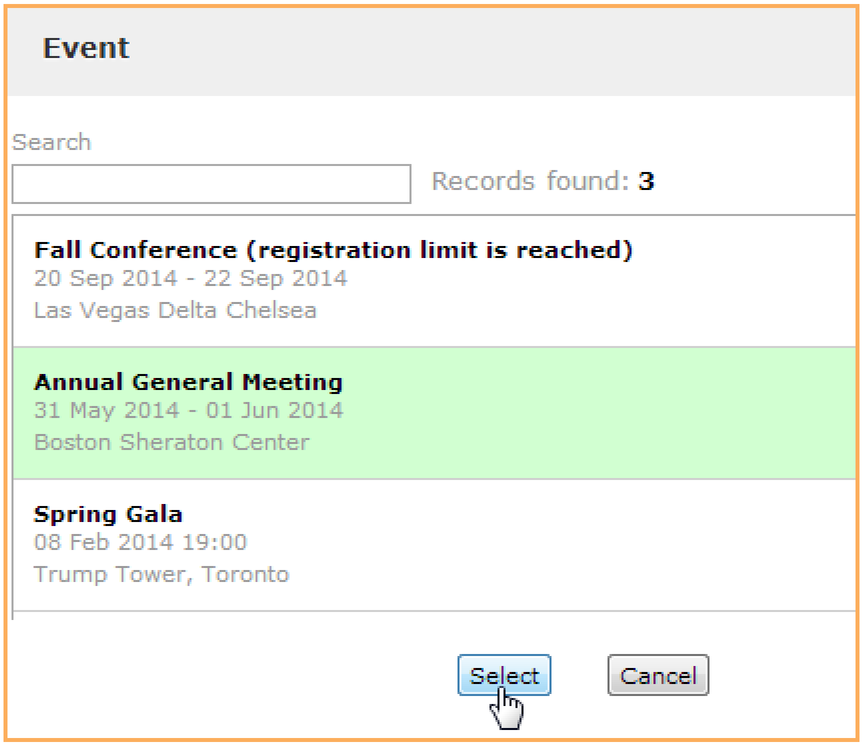
To register a contact for an event from the contact's record, follow these steps:

Read more/less

1. Hover over the **Contacts** menu and select the **List** option.
2. Select the contact that you wish to register.
3. Within the contact record, click on the **Events** tab.
4. Click the **Record event registration** button.



5. Select the event from the pop-up window then click the **Select** button.



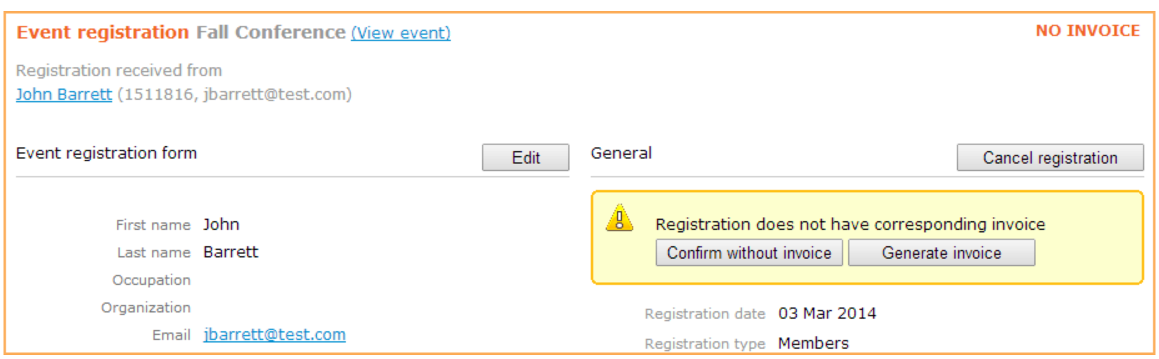
6. Select the registration type and choose from any of the available event options.
7. Click the **Save** button to save the registration.

Generating the invoice

When you manually register an event attendee, an invoice is not automatically generated. You will be prompted to choose one of the following options:

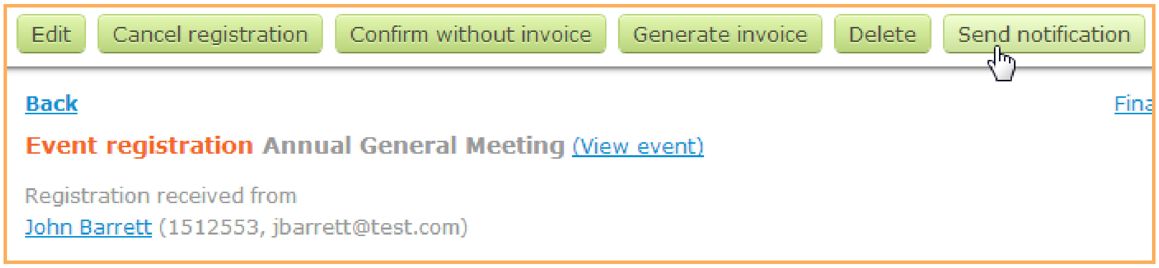
Read more/less

- **Activate without invoice** – activates the registration without generating an invoice. Choose this option if you are waiving the registration fee or if you do not want to track this transaction in Wild Apricot.
- **Generate invoice** – generates an invoice for the registration. The member can then pay the invoice online through their profile or by using an offline payment method (e.g. cash, check). For instructions on recording an offline payment, click here.
- **Cancel registration** – cancels the registration.



Sending an event registration email

After you've finished manually registering a contact for an event, you can send an event registration email by clicking the **Send notification** b utton.



The email will use the email template you have customized for event registration confirmations.

On this page:

- Registering from an event page
- Registering from a contact's record
- Generating the invoice
- Sending an event registration email

Expand all sections

Guest event registration

Guest event registration

You can enable guest registrations so that registrants can register other people at the same time that they submit their own registration. You can choose to collect full or partial registration information for each guest, or just ask for the total number of guests. You can also choose whether to charge a special guest price for the event or just use the base price.

Depending on the option you choose for each event, the guest can be automatically added to your contact database. Each guest registration will count towards the registration limit for the event.

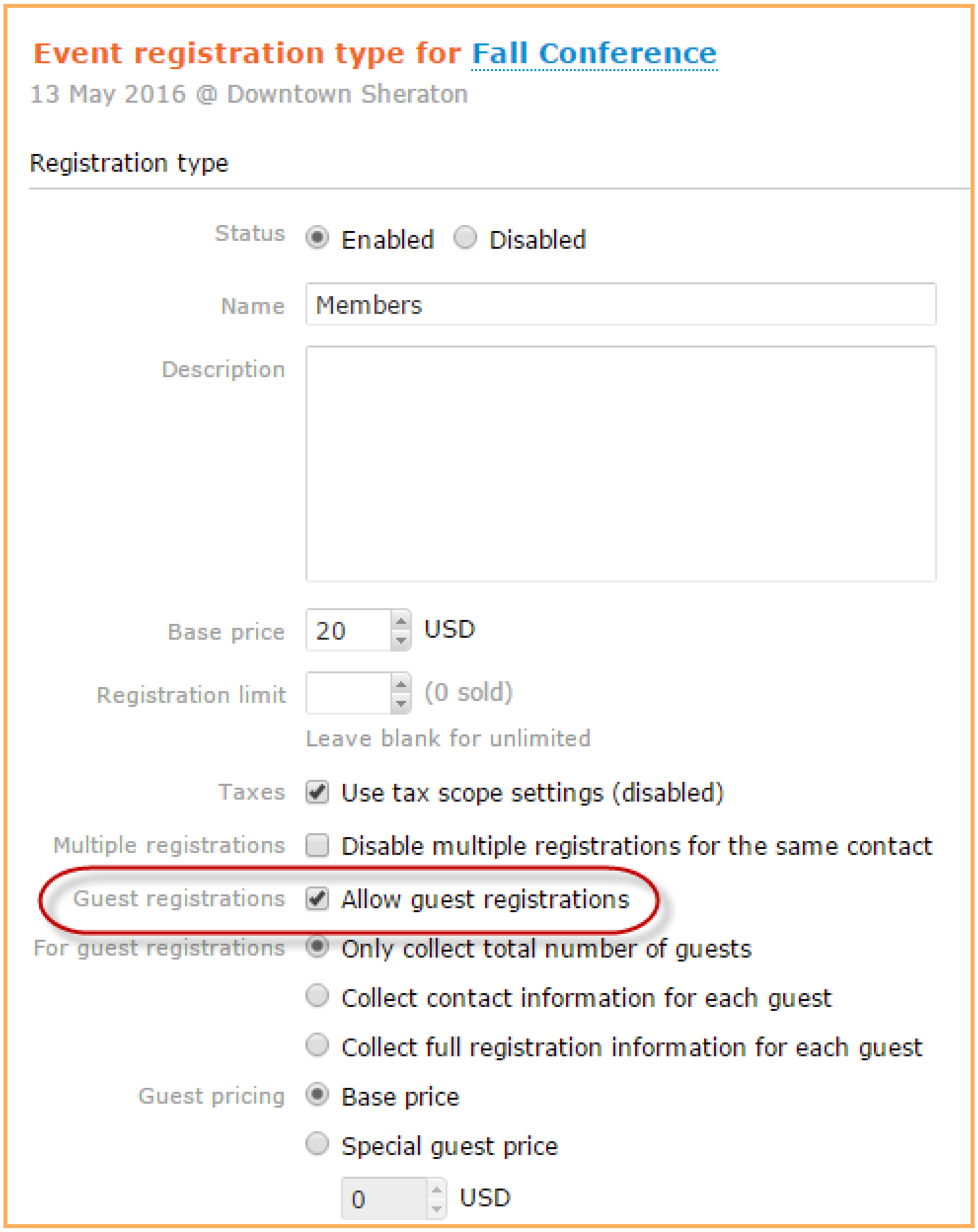
Even if you do not enable guest registrations, one person can register and pay for multiple attendees. To register multiple attendees, return to the event registration page after confirming each registration but before paying. Whether a visitor can register multiple times under their own email address depends on the Disable multiple registrations for the same contact option that appears for each event on the **Registration types & settings** tab.

Enabling guest registration

Read more/less

You can enable guest registrations separately for each registration type you set up for an event. In this way, you can set some registration types to allow guest registrations and others not to.

To enable guest registrations, click the **Allow guest registrations** checkbox while setting up the registration type.



With guest registrations enabled, you can now decide how much information you want to collect about the guests. You have the following options:

Option	Description
Only collect total number of guests	The registrant will only be asked to enter the number of guests they want to bring to the event.
Collect contact information for each guest	The registrant will be asked to enter contact information for each guest using the contact fields you have set up.
Collect full registration information for each guest	Each guest will be required to complete the full registration form. This includes any extra cost fields that may be associated with the registration form.

You can also set the **Guest pricing** for the event. You have the following options:

Option	Description
Base price	Guests are charged the same amount as the main registrant.

Special guest price	Guests are charged the price you choose. The main registrant will still be charged the base price for their own registration.

If you selected **Collect full registration information for each guest**, you cannot specify a guest price. Their price will be calculated using the base price and any extra cost fields that are selected for the guest.

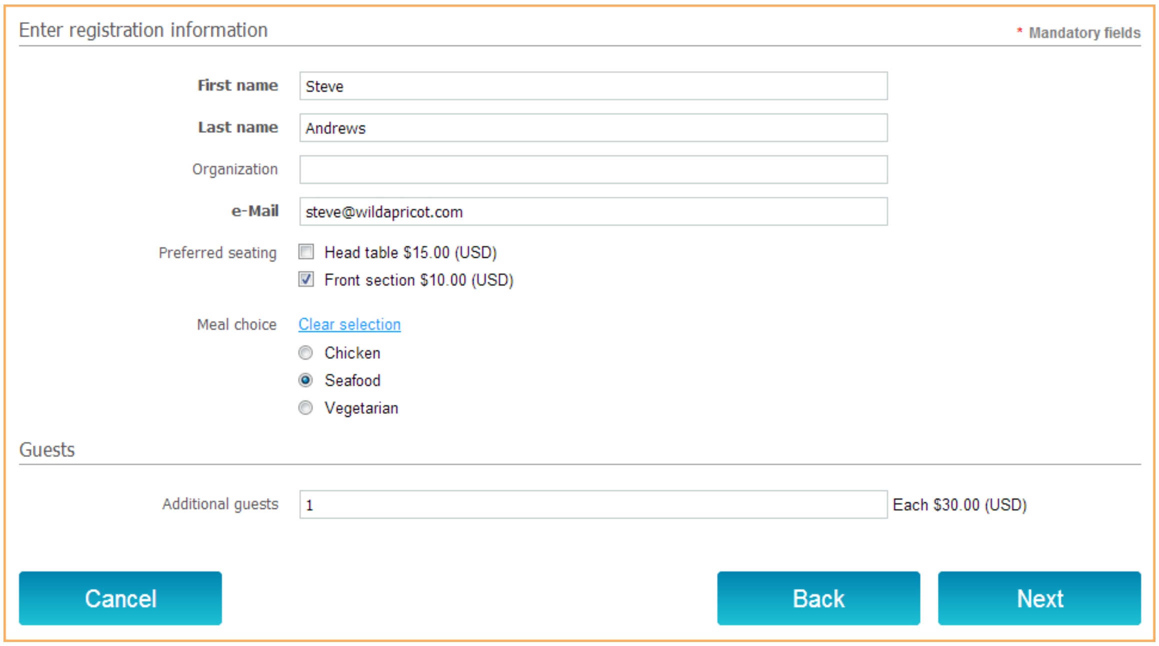
Online guest registration

Read more/less

Depending on which guest registration option you've chosen, there are different ways to record guest registrations as part of the event registration.

Only collect total number of guests

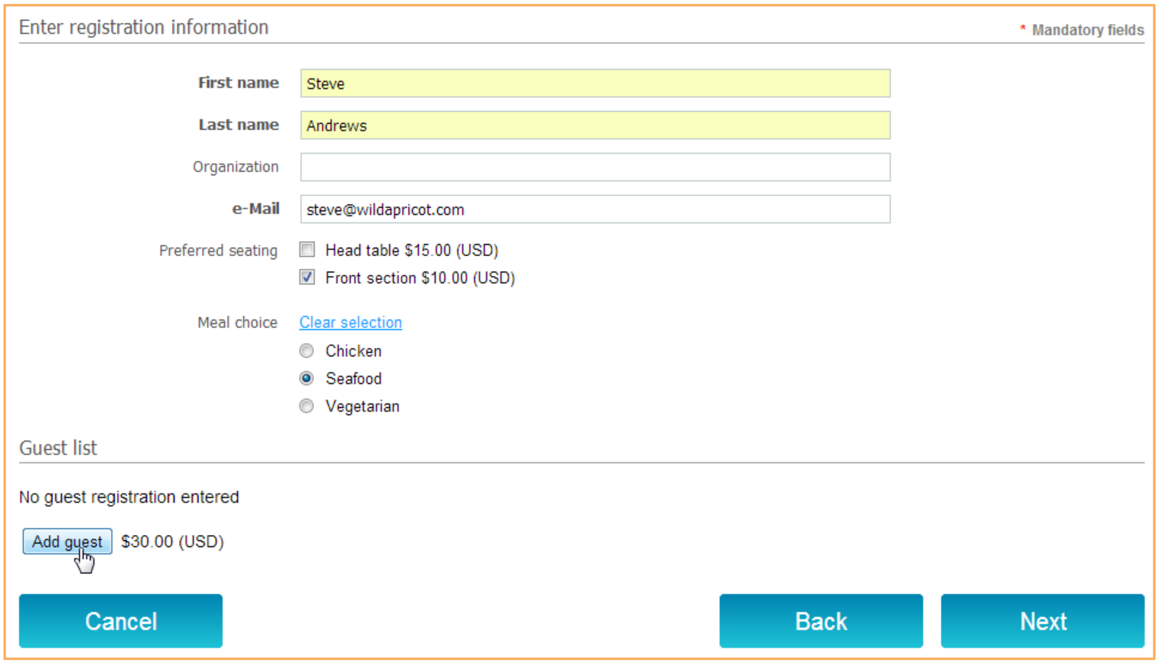
At the bottom of the registration form, there is a Guests section. The registrant can enter the number of guests he or she wants to bring to the event.



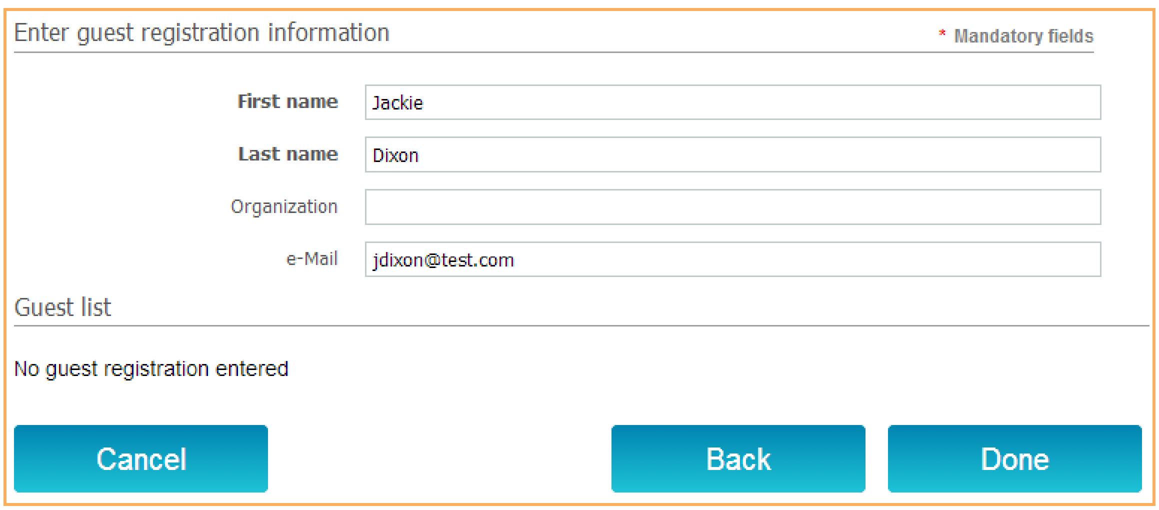
On the payment confirmation screen, they will see their own price as well as the total price for all their guests.

Collect contact information for each guest

After filing out their registration form, the registrant will have the ability to either finish their registration, or they can register a guest by clicking the **Add guest** button.



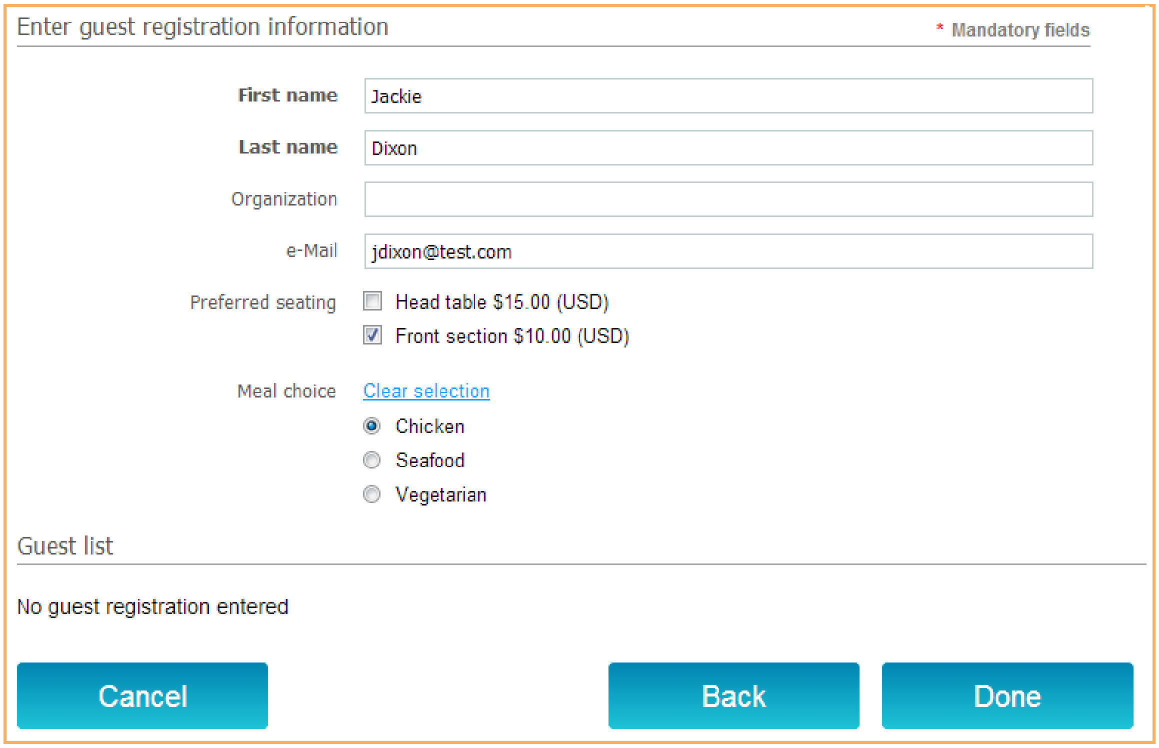
If they chose to register a guest they will be given a form where they can fill in the contact information for the guest.



After each guest has been registered, the registrant has the option of either completing the registration process or adding another guest. The only limit on the number of guests is the overall registration limit for the event.

Collect full registration information for each guest

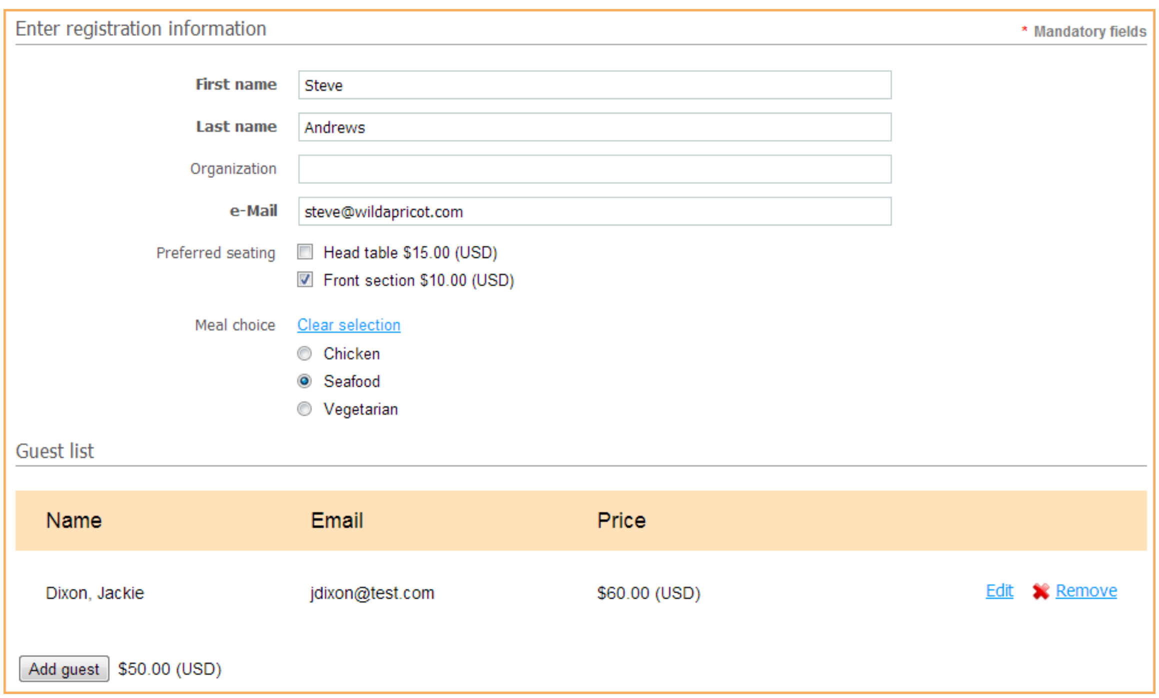
After filing out their registration form, the registrant will have the ability to either finish their registration, or they can register a guest. After they click the **Add guest** button, a full event registration form appears for the guest. It will include any extra cost fields that appear on the registration form for the main registrant.



Any extra cost items chosen will be added to the guest's event registration details and the main registrant's invoice.

Editing and completing guest registrations

Each time the registrant adds another guest, they will see a summary of all the guests they have entered. Within the list, they can modify or remove each of their guests.



After the registrant clicks the **Done** button, they will a summary of their registration, including any guests they have registered.

The registrant will be invoiced the full amount for themselves and their guests, and they are responsible for the entire payment. The invoice for the event registration will contain items detailing the price and extra cost for each guest registered.

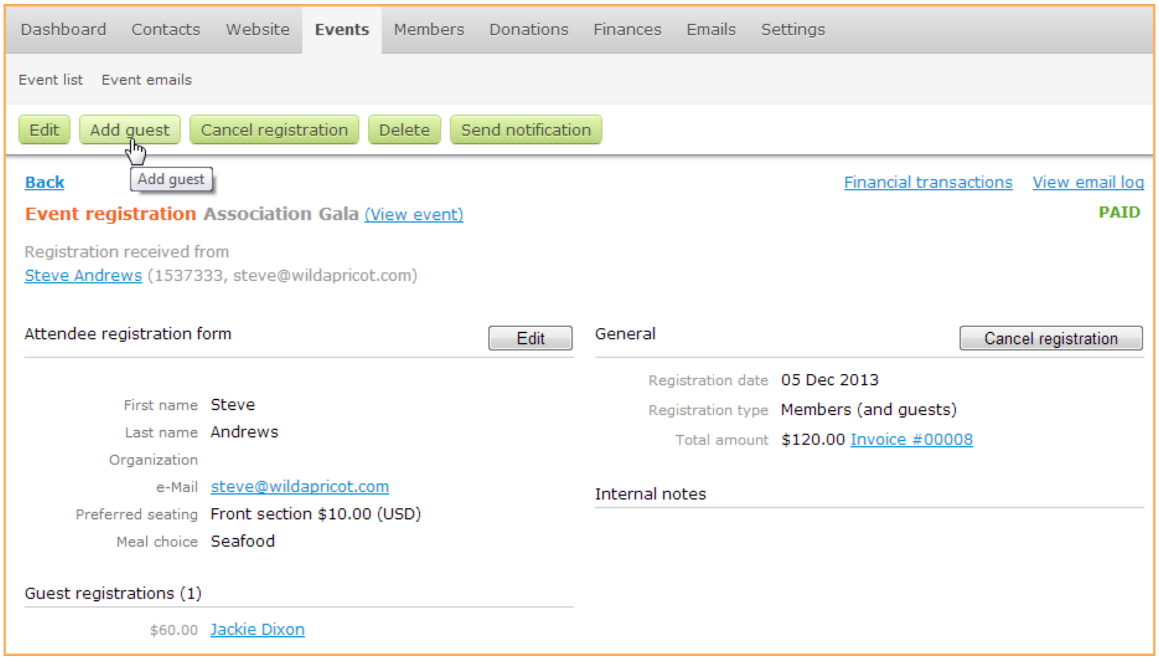
Manually adding guests

Read more/less

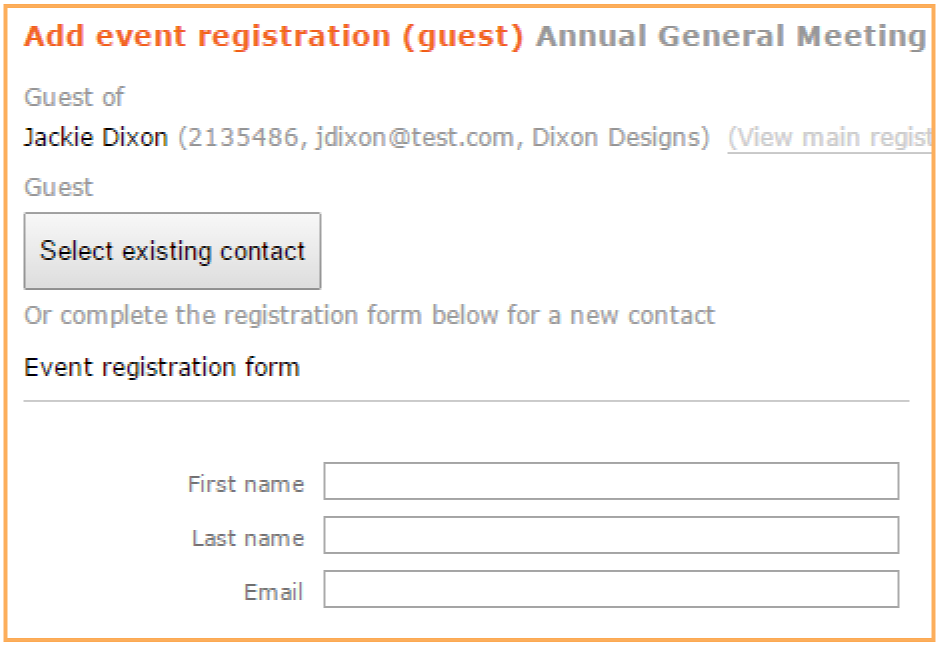
Administrators can manually add guests to existing event registrations.

To manually add a guest to an event registration, follow these steps:

1. Hover over the **Events** menu and select the **Event list** option.
2. Click the event within the list.
3. Click the **Registrants & invitees** link.
4. Click the row showing the event registration you want to add guests to, but don't click the name of the registrant.
5. If the registration type used for this registration is set up to only collect the number of guests, then click the **Edit** button and adjust the number of guests displayed at the bottom of the registration.
6. If the registration type is set up to collect contact information or full registration information, click the **Add guest** button.



7. To add an existing contact as a guest, click the **Select existing contact** button. To add someone not in your contact database as a guest, complete the event registration form.



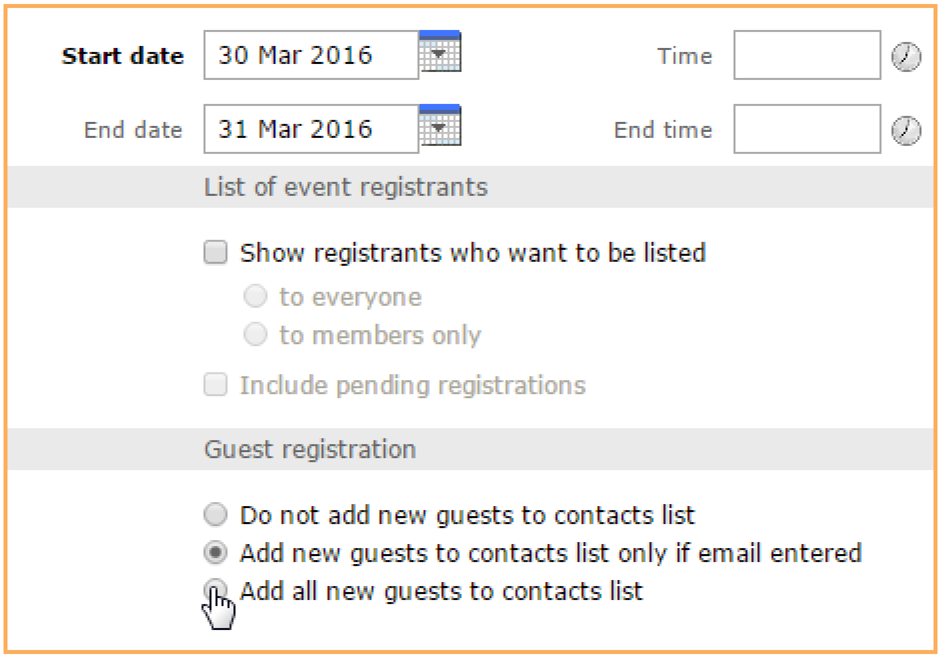
8. Click **Save** to save your changes to the event registration.

You can add as many guests as you want, even in access of the overall event registration limit. Depending on the **Guest registration** set ting that appears on the event details (see below), guests can be automatically added to your contact database (thereby counting towards your contact database limit).

Automatically adding guests to contact database

Read more/less

Within the event details for each event, you can control whether guests are automatically added to your contact database.

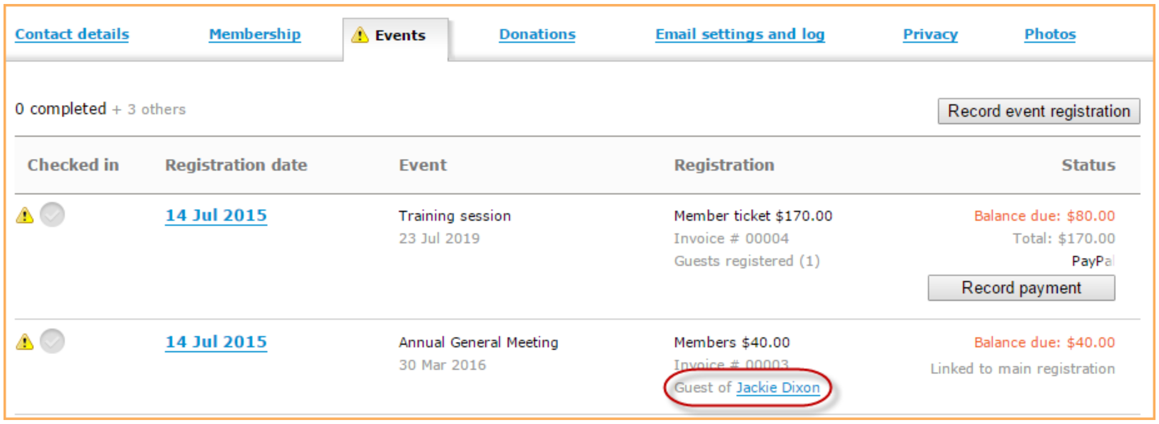


The following options are available:

Option	Description
Do not add new guests to contacts list	Guests will **not** be added to your contact database even if they provide contact details or complete the registration form.
Add new guests to contacts list only if email entered	Guests will be added to your contact database only if they provide an email address.
Add all new guests to contacts list	Guests will be added to your contact database even if they do not provide an email address.

With either of the last two options enabled, guests will be added to the contact database when the main registrant clicks the **Confirm** butt on to confirm the registration.

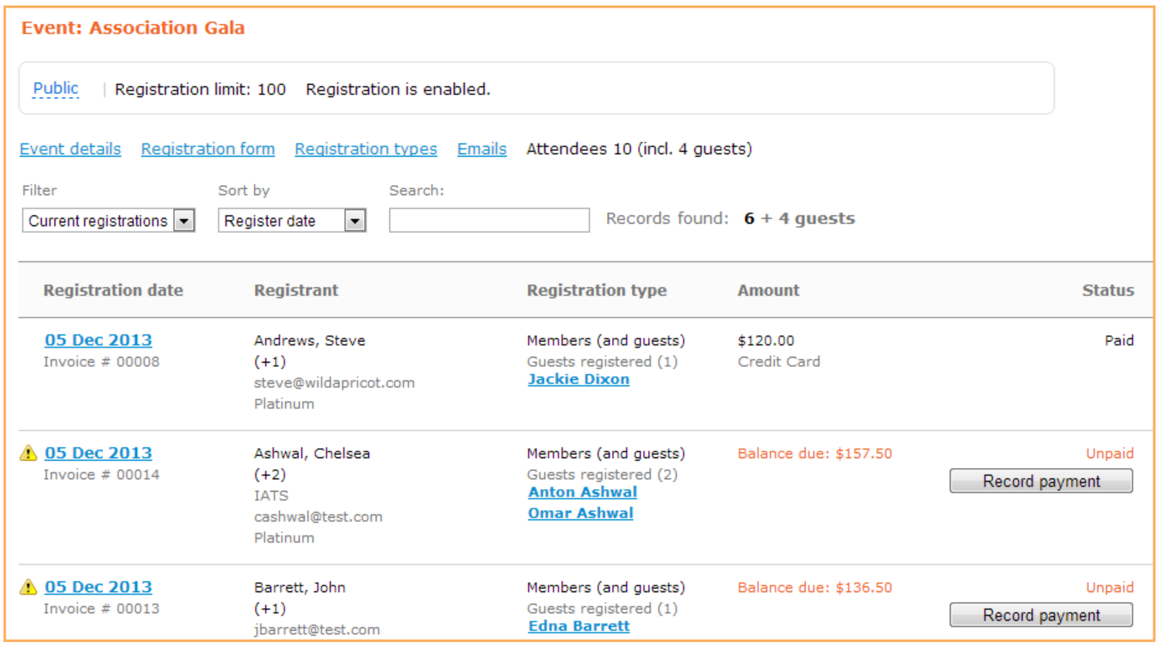
Existing contacts added as guests will have their registrations automatically added to their records.



Viewing guest registrations

Read more/less

The attendees list shows all registrants including their guests. If information is collected for their guests, then the names of their guests will be displayed.



To view the registration details for a guest, click the name of the guest within the attendees list.

Guests and their registration details are also displayed on the Event registration fields report.

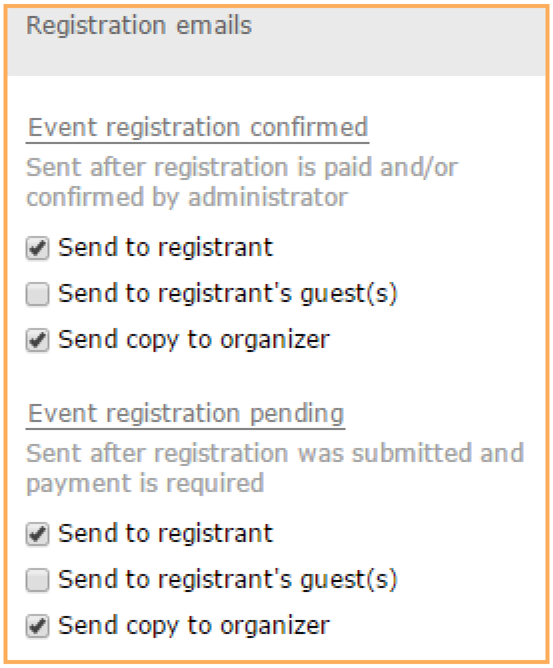
Emailing guests

Read more/less

Guests – whether added to your contact database or not – will be included in manual email blasts to event registrants, but not scheduled event reminders.

You can email guests separately by performing an advanced contact search using the **Registered as** search criteria (see below for details).

You can also control whether guests receive event registration emails, along with registrants and the event organizer. The option to control who receives event registration emails appears on the **Emails** tab for each event.



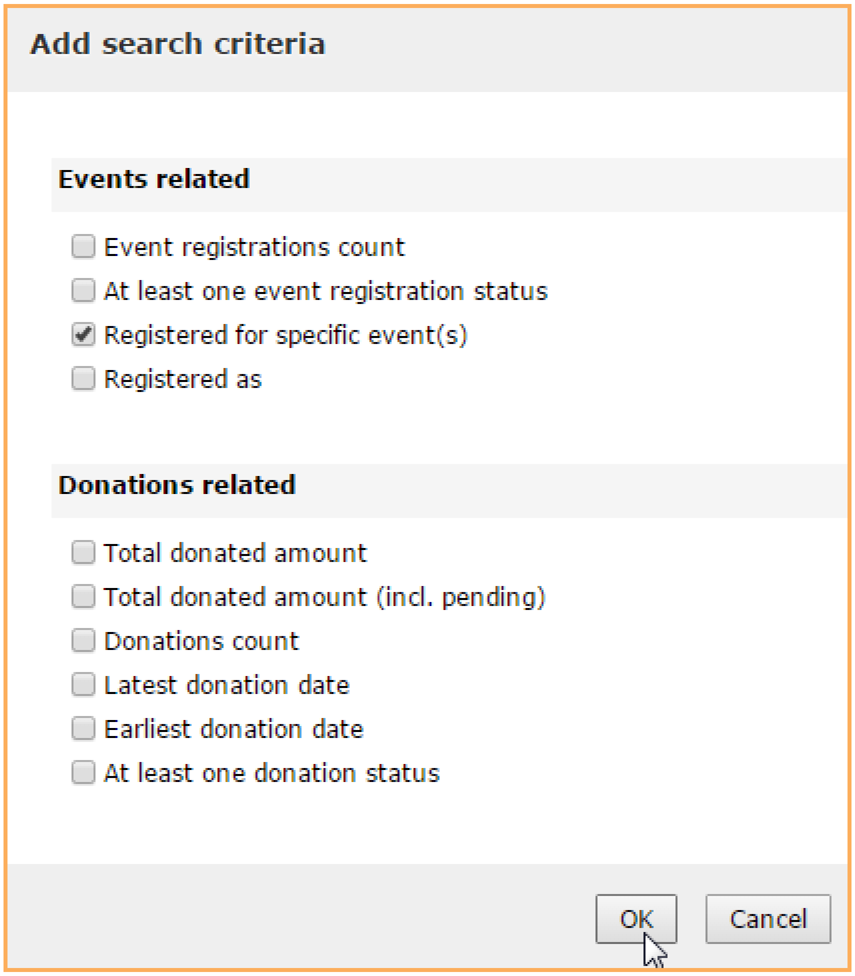
Searching for guests

Read more/less

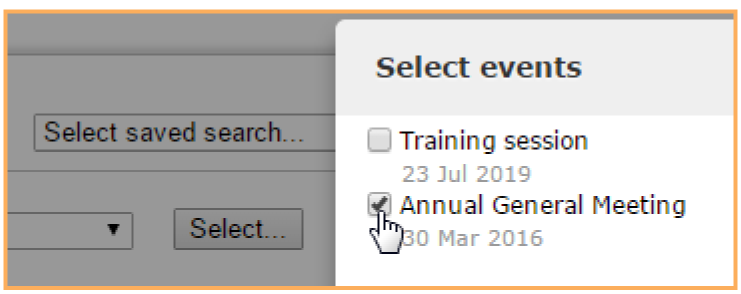
You can search for all guests registered for any event, or just guests registered for a particular event. From your search results, you can send an email blast to the guests, and save the search for future use.

To search for guests, follow these steps:

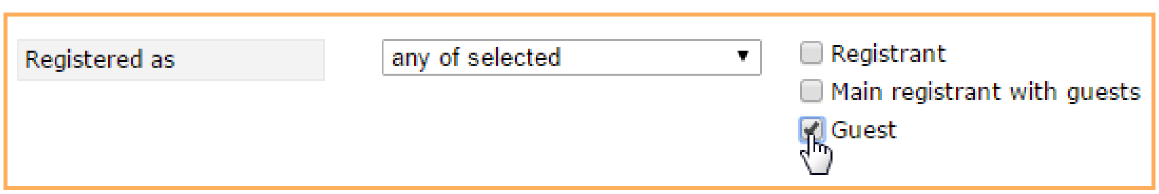
1. Hover over the **Contacts** menu and select the **Advanced search** option.
2. If you want to search for guests registered for a particular event, click the **Add criteria** button and chose the **Registered for specific event(s)** option then click **OK**. Otherwise, jump to step 4.



3. Click the **Select** button and choose the event(s) you want to search.



4. Click the **Add criteria** button and chose the **Registered as** option then click **OK** .
5. Within the **Registered as** entry, click the **Guest** option.



6. To save the search for future use, enter a search name then click **Save**. Otherwise, click **Search**.

Once you have your search results, you can:

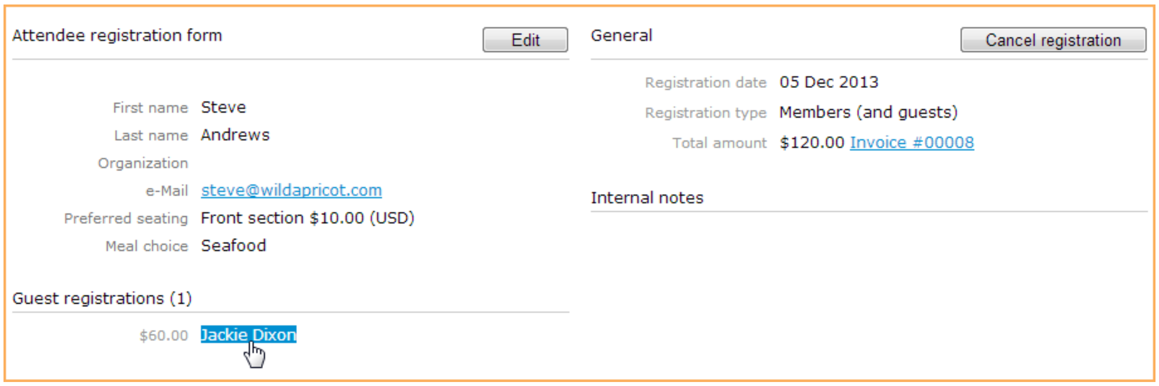
- Send an email blast to the guests by clicking the **Email contacts** button.

- Export the results to a spreadsheet by clicking the **Export** button.
- Archive the guests by clicking the **Archive contacts in this list** button.
- View individual contact details by clicking on contacts within the list, then use the **Prev** and **Next** button to browse through other contact records in the list.

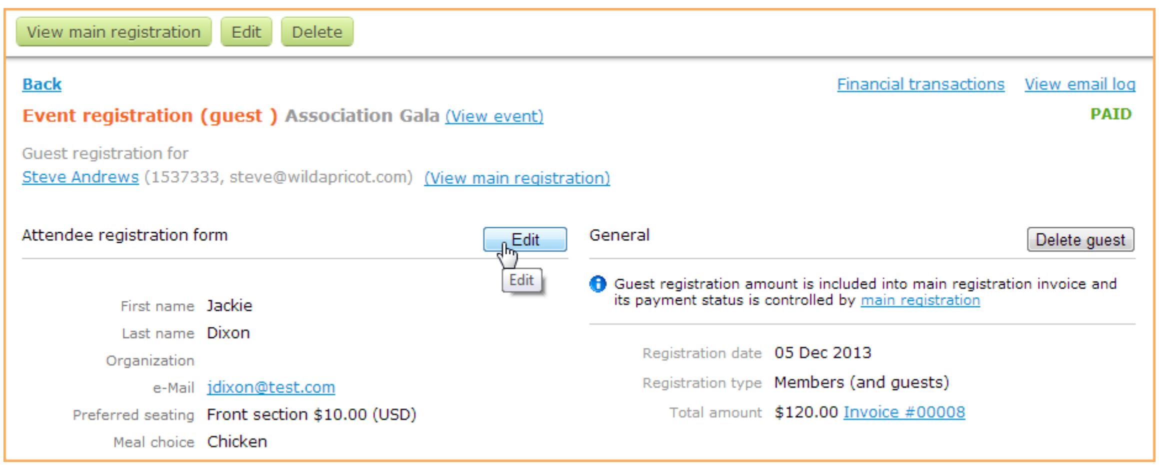
Modifying or deleting guest registrations

Read more/less

If you are collecting contact information or complete registration information for guests, you can modify or delete the guest registrations. Guests for whom information is collected will be listed at the bottom of the main registration record, and on the event attendees list. To modify or delete the guest registration, click the guest's name.



On the next screen, you can click the **Edit** button to modify the guest registration, or click the **Delete guest** button to delete the guest registration.



Exporting guest registration information

Read more/less

You can export the current list of registrants – along with their guests and registration information – by clicking the **Export registrants** b utton. The number of guests for each main registrant will be listed in the **Guest registrations** column. For each guest, their host or main registrant is listed in the **Linked registration** column.

	A	B	C	D	E	F	G	H
1	**Member ID**	**First name**	**Last name**	**e-Mail**	**Preferred seating**	**Meal choice**	**Guest registrations**	**Linked registration**
2	1537333	Steve	Andrews	steve@wildapricot.com	Front section	Seafood	1	
3		Jackie	Dixon	jdixon@test.com	Front section	Chicken	0	Andrews, Steve
4	1537478	Chelsea	Ashwal	cashwal@test.com		Vegetarian	2	
5		Omar	Ashwal			Vegetarian	0	Ashwal, Chelsea
6		Anton	Ashwal			Vegetarian	0	Ashwal, Chelsea
7	1537488	John	Barrett	jbarrett@test.com	Head table	Seafood	1	
8		Edna	Barrett	ebarrett@test.com	Head table	Chicken	0	Barrett, John
9	1564329	Kim	Jones	kjones@test.com		Chicken	0	
10	1537485	Garvin	Maye	garvinmaye@test.com		Vegetarian	0	
	1537489	John	Didsbury	jdidsbury@test.com	Head table	Seafood	0	

On this page:

Expand all sections

Viewing event registration information

Viewing event registration information

After you have added a new event and enabled online registration, you can view information about registrations for the event. For each event, you can view:

- a list of event registrants and invitees
- details of individual registrations
- summary of event payments
- summary of event choices

Invitees are contacts who have been sent an event announcement that includes the {Registration_buttons} macro but haven't yet registered for the event.

You can also view:

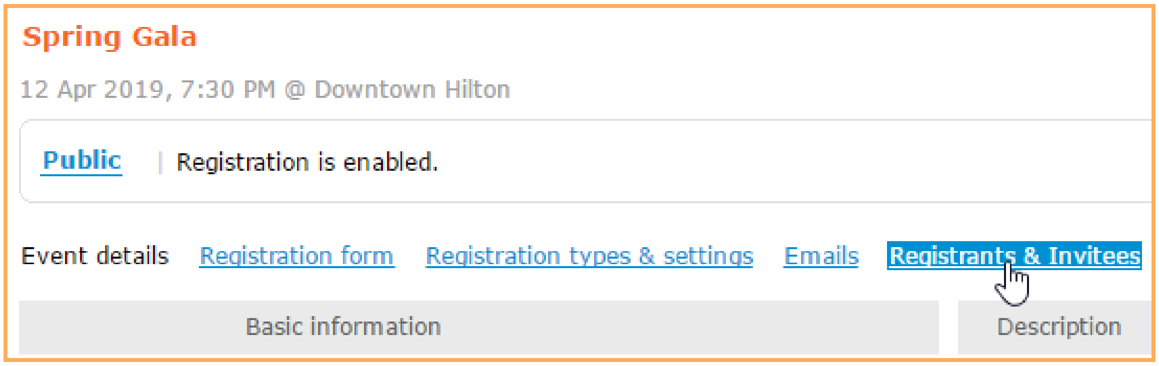
- a list of contacts with event registrations
- all event registrations for a contact

Viewing event registrants and invitees

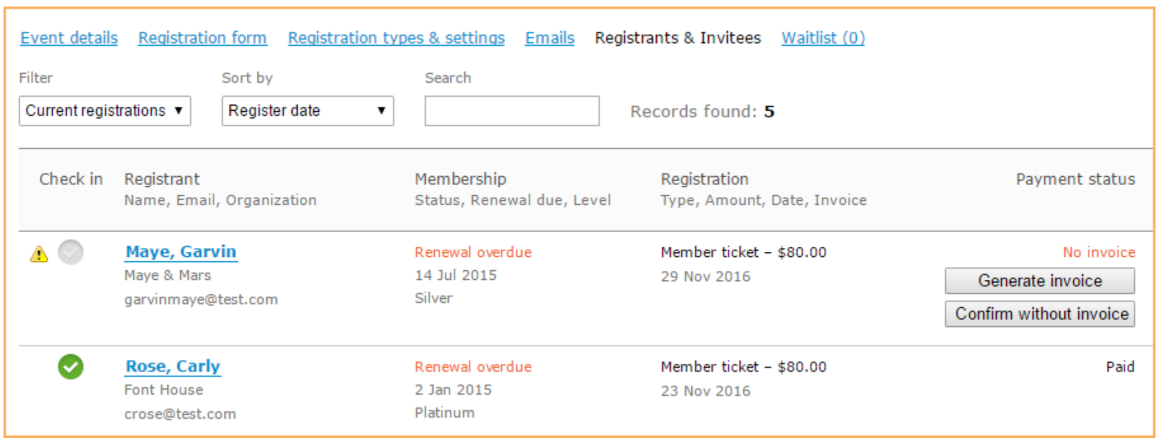
To view a list of registrants and/or invitees for a particular event, follow these steps:

Read more/less

1. Hover over the **Events** menu and select the **Event list** option.
2. Click the event within the events list.
3. Within the event details, click the **Registrants & invitees** link.



By default, the list is filtered to show just current registrants.



You can filter the list to display invitees and different kinds of registrants. For more information, see Filtering the list of registrants and invitees (below).

Column	Description
Check in	Indicates whether the registrant or guest has been checked in to the event. For more information, see Tracking event attendance.
Registrant	Name, email, and organization of the registrant (or invitee), and number and names (if applicable) of guests. Members should login before registering for an event, so the system can properly classify their registration and apply the appropriate registration rate and connect this registration with the member record. All people who registered without logging in are considered visitors.
Membership	The membership status, renewal date, and membership level of the registrant (or invitee).

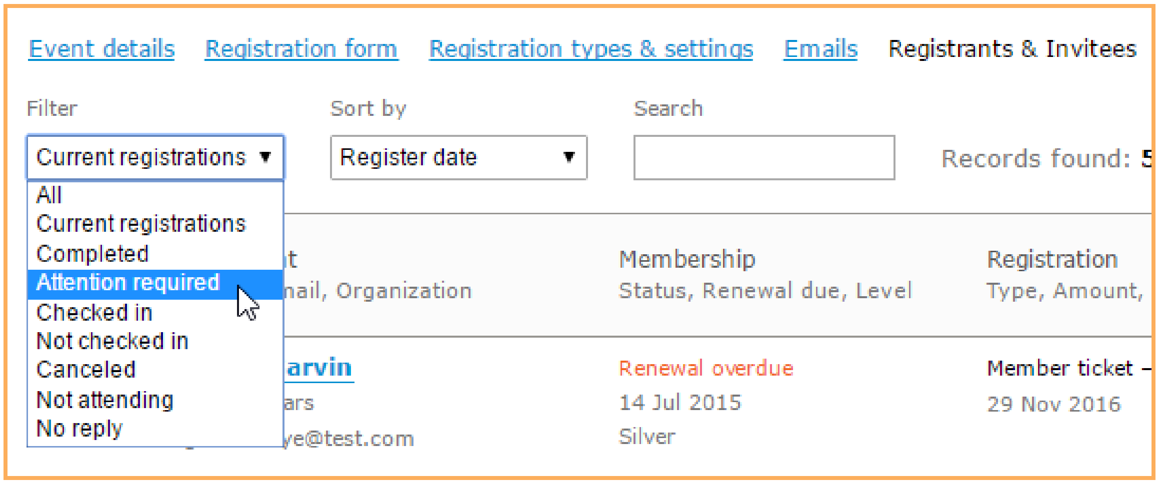
Registration	The registration type, registration fee (including extra costs they have selected as well as the amount of guest registrations), registration date, and invoice number for the registration.
Payment status	Status of the registration invoice. If no event invoice exists for the contact, you have the option of generating a new invoice, or confirming the registration without creating a new invoice (and no fee will be charged to the registrant). You also have the option to record payment on all outstanding invoices. Once paid in full, the status is shown as *Paid*.

You can click anywhere within a row to view the registration details for a contact. From there, you can edit the registration, resend confirmation, cancel, or delete the registration.

Filtering the list of registrants and invitees

By default, the **Registrants & invitees** tab displays only the current registrants for your event. You can filter the list to display invitees or certain kinds of registrants.

Read more/less

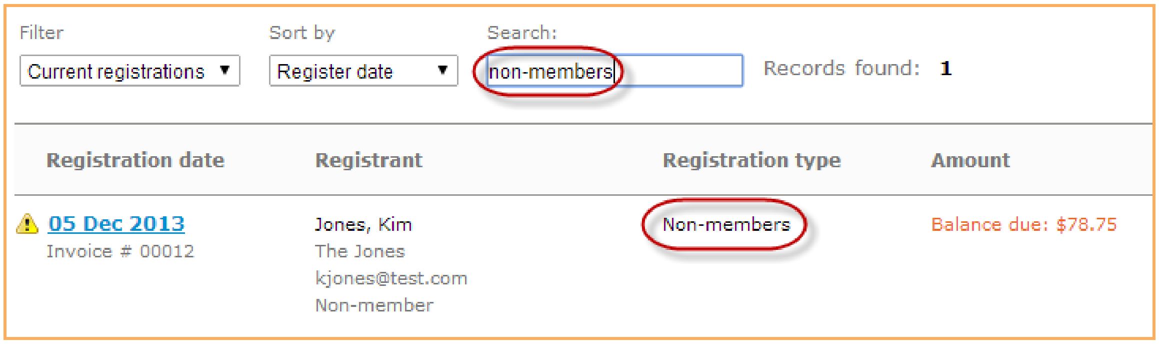


The following filter options are available:

Option	Who is listed?
All	All registrants and invitees for this event. Invitees are contacts who have been sent an event announcement that includes the {Registration_buttons} macro but haven't yet registered for the event. Registrants and invitees will be displayed alphabetically in the following order: 1) registrants 2) invitees who are not attending 3) invitees who have not replied 4) cancelled registrants.
Current registrants	Contacts who are currently registered for this event.
Completed	Registrants who have paid their registration fee, and registrants with free registration types.
Attention required	Registrants who haven't paid their registration fee.
Checked in	Registrants who have been checked in for the event.
Not checked in	Registrants who have not been checked in for the event.
Canceled	Contacts whose registrations for this event has been cancelled.

Not attending	Invitees who indicated that they are not planning on attending this event by clicking the **Not attending** button. For more information, see Providing a Not attending option.
No reply	Invitees who aren't registered for this event and haven't clicked the **Not attending** button.

You can also enter text in the **Search** field to further filter the list, displaying only those records that match your search text (and the current filter option).

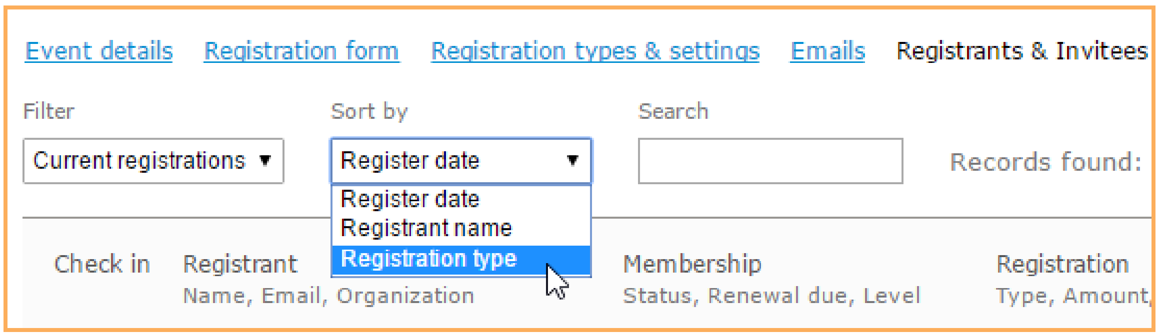


The matching text can appear anywhere within the information displayed for the registrant (or invitee) on this screen.

Sorting the list of registrants and invitees

You can filter the list of registrants and invitees by registration date, registrant name, or registration type.

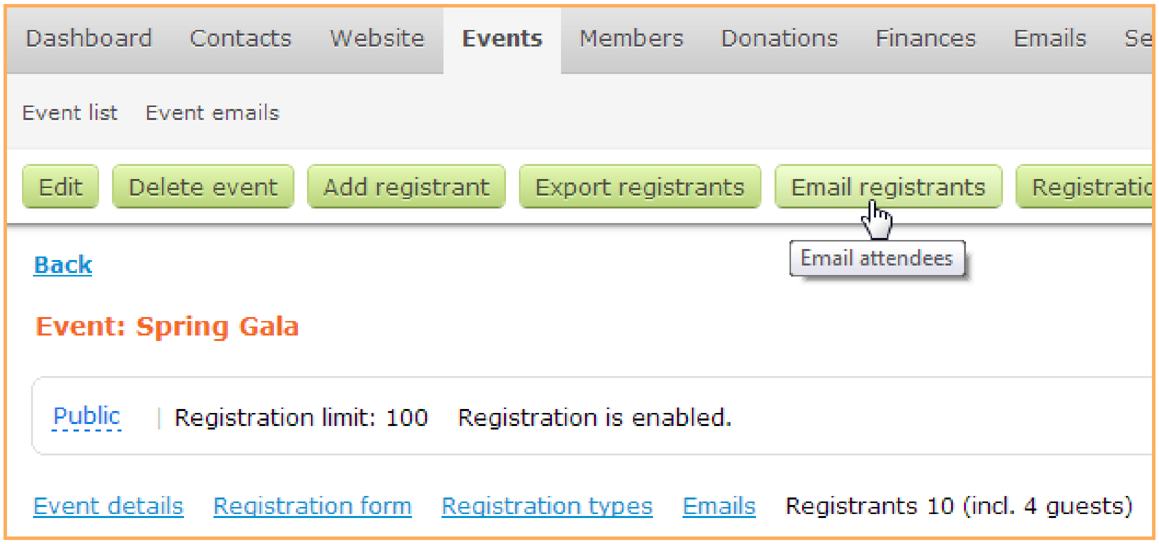
Read more/less



Emailing event registrants and invitees

While viewing the list of registrants and invitees, you can send an email blast to everyone on the list by clicking the **Email registrants** button.

Read more/less



Clicking the **Email registrants** button can result in the email being sent to non-registrants. The email will go to everyone currently displayed on the registrants and invitees list, so make sure the list is properly filtered before clicking this button. On all other event tabs, clicking the **Email registrants** button will send an email to event registrants only.

You can create your email blasts from scratch or use one of the professionally designed email templates provided by Wild Apricot. In either case, you can add text, formatting, graphics, and links to the message. To personalize the message, you can use macros to insert specific information such as the recipient's first name or organization.

After you've sent your email blast, you can track opened, clicked, and undelivered mail, and review email failures. For more information, see Sending email blasts.

Guest registrants receiving the email blast will be unable to use the **Unsubscribe** link to unsubscribe from future emails since they have not been added to your contact database.

Exporting event registrants

You can export the current list of registrants – along with their registration information – for a specific event or for all events in the events list.

To export registrants across all events in the events list – including past events – display the events list then click the **Export registrants** button. If you enter a search string in the **Search** field, only the currently listed events will be exported.

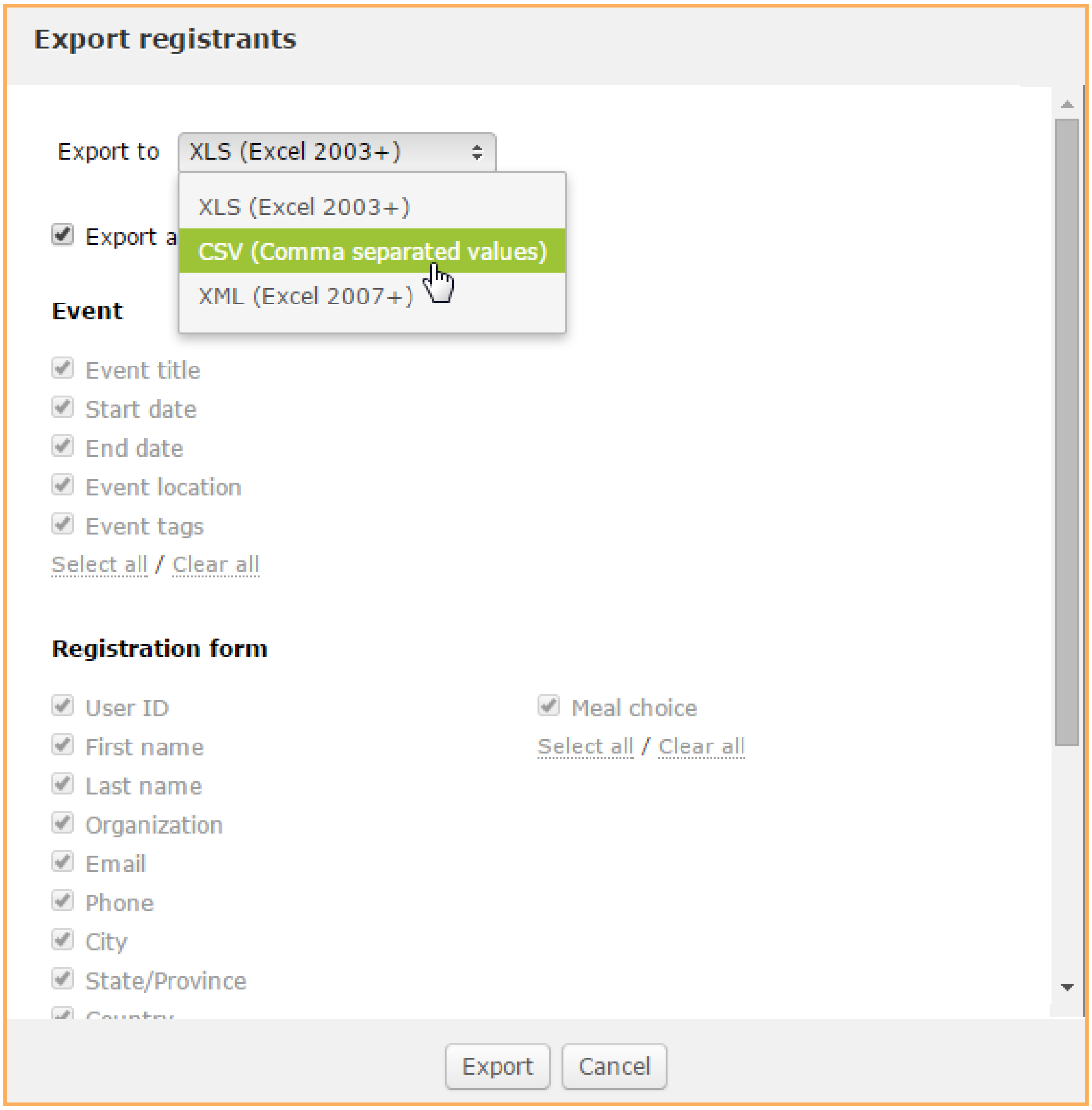
To export event registrants for a particular event, click on the event within the events list then click the **Export registrants** button.

Read more/less

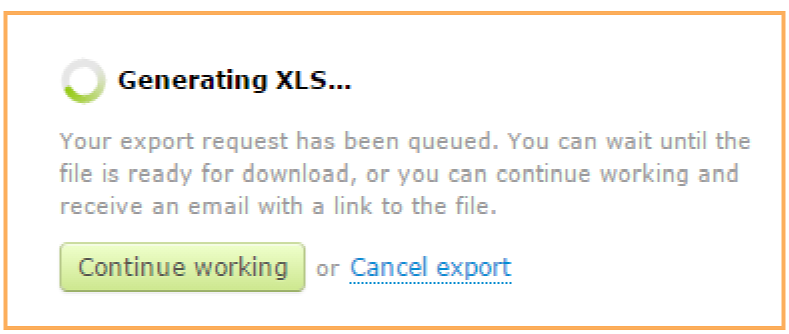
If you click the **Export registrants** button from the **Registrants & invitees** tab, the export file will include everyone currently displayed in the registrants and invitees list. Since this list can include non-registrants, make sure it is properly filtered before clicking this button. On all other event tabs, clicking the **Export registrants** button will export event registrants only.

In either case, you can select the export file format – XLS, CSV, or XML – and choose which fields to include in the export file. You can choose from event details, registration form values – including both common fields and custom event fields – and registration details. Information stored in membership fields will not be included in the export file.

After you have made your selections, click the **Export** button.

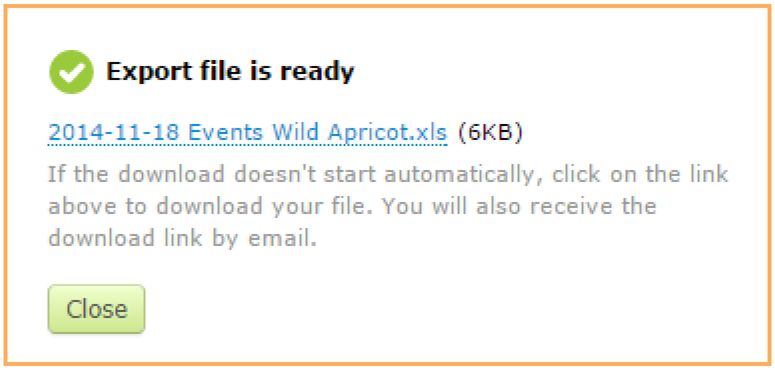


While the export file is being generated, you can click the **Continue working** button and safely switch to another Wild Apricot admin screen.



Once the file is generated, you'll receive an email with a link to the file.

If you waited until the export file was generated, the file will be automatically downloaded. As well, a dialog with a link to the file will appear, and an email with the link will be sent to you.

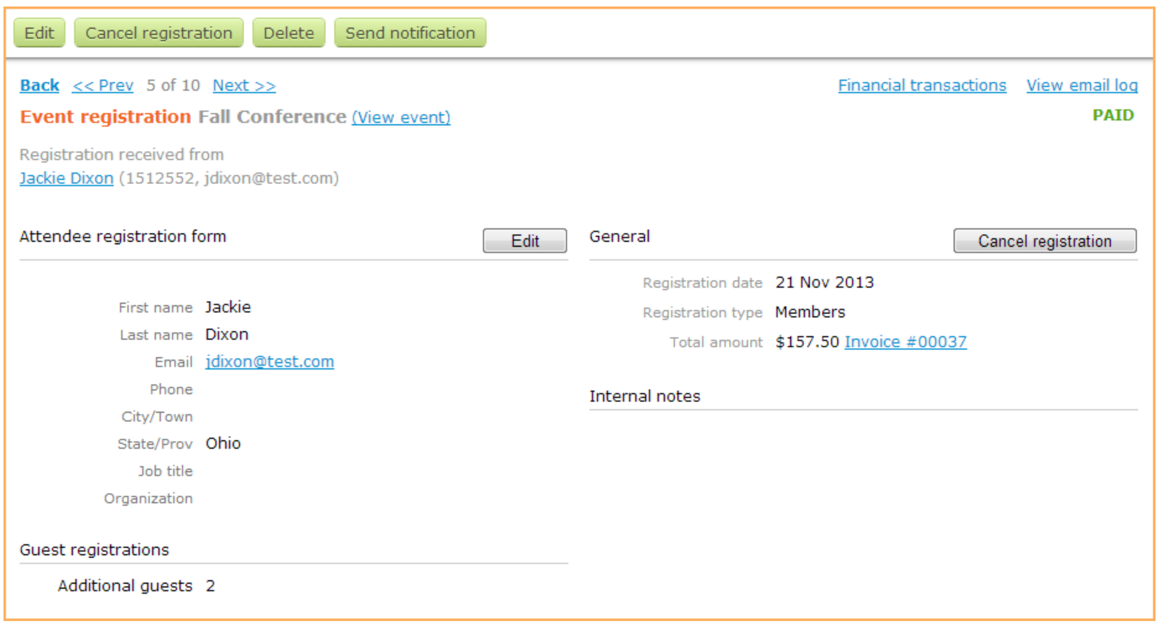


Before clicking the download link within the email, make sure you are logged into your Wild Apricot account as an administrator , and in admin view.

Viewing registration details

The event registration details screen provides the complete details of a single event registration.

Read more/less



To display event registration details for a contact, you can:

- click the event within the list appearing on the contact's **Events** tab, or
- click the appropriate row (but not the contact's name) within the event's **Registrants & invitees** tab.

You can use the **Prev** and **Next** buttons to browse through other registrations within the list.

The event registration details may different from event to event but will always include the same three sections:

Section	Description
Event registration form	Contact information for the registrant.
General	Event name, registration type, and total amount paid by the registrant.
Internal notes	Information about the registration status and event registration type.

If there are any guest registrations, there will be another section, listing the guests and their costs along with the name of their host (the primary registrant). Where details about the guest have been collected, there will be a link to their registration details. To modify or delete a guest registration, click the link under **Guest registrations**.

The following options are available from the event registration details screen:

Option	Description
Edit	Allows you to modify the registration details.
Add guest	Allows you to add a guest if guest registrations are enabled.
Cancel registration	Removes the registration from the event including any guest registrations added by the registrant. Canceled registrations can be viewed on the Registrants list by selecting the **Canceled** filter.
Record payment	Allows you to record a payment if the registration fee has not been fully paid.
Delete	Permanently deletes the registration, its invoice, and attached guest registrations. Deleted registrations can't be restored.
Send notification	Sends registration confirmation email to the registrant.

Modifying an event registration

To modify a registration for an event, follow these steps:

Read more/less

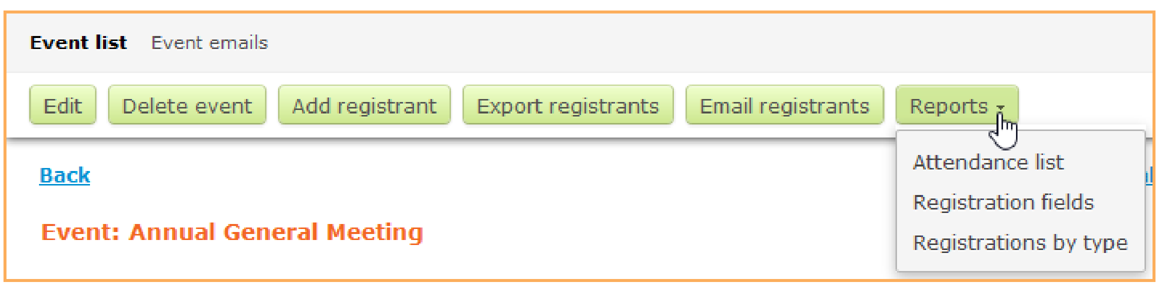
1. Display the event registration details, by clicking the registration within the **Registrants & invitees** list.
2. Within the event registration details, click the **Edit** button.
3. Make the necessary changes.
4. Click the **Save** button.
5. If the changes you made affect the cost of the event – maybe you changed the registration type or the number of guests – you will be prompted to update the invoice, delete the invoice, or cancel the invoice update. When changing from a paid registration type to a free one, you should delete the invoice (since you cannot have an invoice without a cost).
6. If you choose to update the invoice, you can then click the **Email** button to email the updated invoice to the registrant. An email will not be automatically sent.

Generating registration reports

You can generate the following reports for an event:

- attendance report
- event payments report
- registration fields report

To generate an event report, click the event within the event list, then click the **Reports** button and select the appropriate option.

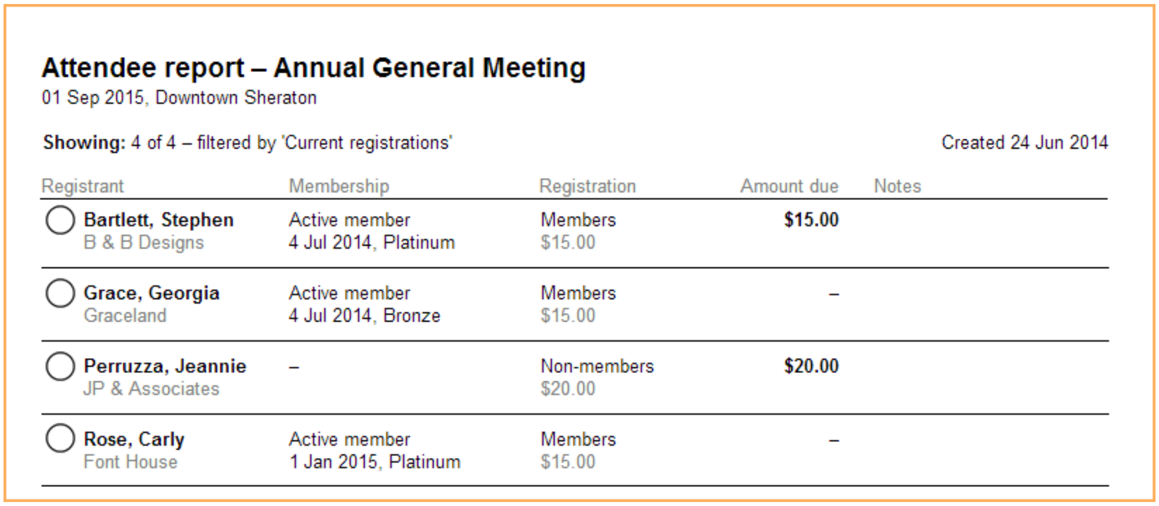


To produce your own custom reports, you can export registrant records to Excel by clicking the **Export registrants** button from the registrants list.

Attendance report

You can generate and print an attendance report that you can use to manually record attendance at the event.

Read more/less



Attendee report – Annual General Meeting

01 Sep 2015, Downtown Sheraton

Showing: 4 of 4 – filtered by 'Current registrations'

Created 24 Jun 2014

Registrant	Membership	Registration	Amount due	Notes
Bartlett, Stephen B & B Designs	Active member 4 Jul 2014, Platinum	Members $15.00	**$15.00**	
Grace, Georgia Graceland	Active member 4 Jul 2014, Bronze	Members $15.00	–	
Perruzza, Jeannie JP & Associates	–	Non-members $20.00	**$20.00**	
Rose, Carly Font House	Active member 1 Jan 2015, Platinum	Members $15.00	–	

You can then use the completed attendance report as a reference while recording attendance in Wild Apricot.

Before generating the report, you can sort and filter the list of registrants to control the order and narrow the scope of the report.

To generate an attendance report, click the **Reports** button from the event details screen and select the **Attendance list** option.

You can also record event attendance using the Wild Apricot mobile app.

Event payments report

To view a summary of registration payments for a particular event, click the **Reports** button from the event details screen and select the **Regi strations by type** option.

Read more/less

The report that appears lists the number of registrants, the amount collected, and the amount owing, broken down by registration type.

Fall Conference

Location: Delta Chelsea
Date: 11 Sep 2012 9:00 AM - 13 Sep 2012 5:00 PM
Currency: USD

Total registrations

Status	Attendees	Registration fees	Payments received
Confirmed (fully paid and free)	10	2,825.00	2,825.00
Pending (unpaid and partially paid)	5	1,977.50	0.00
Canceled	1	250.00	-
Total	**16**	**5,052.50**	**2,825.00**

By registration type

Members

Status	Attendees	Registration fees	Payments received
Confirmed (fully paid and free)	5	1,412.50	1,412.50
Pending (unpaid and partially paid)	3	1,412.50	0.00
Canceled	0	0.00	-
Total	**8**	**2,825.00**	**1,412.50**

Non-members

Status	Attendees	Registration fees	Payments received
Confirmed (fully paid and free)	5	1,412.50	1,412.50
Pending (unpaid and partially paid)	2	565.00	0.00
Canceled	1	250.00	-
Total	**8**	**2,227.50**	**1,412.50**

You can export this report by clicking the **Export to PDF** or **Export to Excel** buttons.

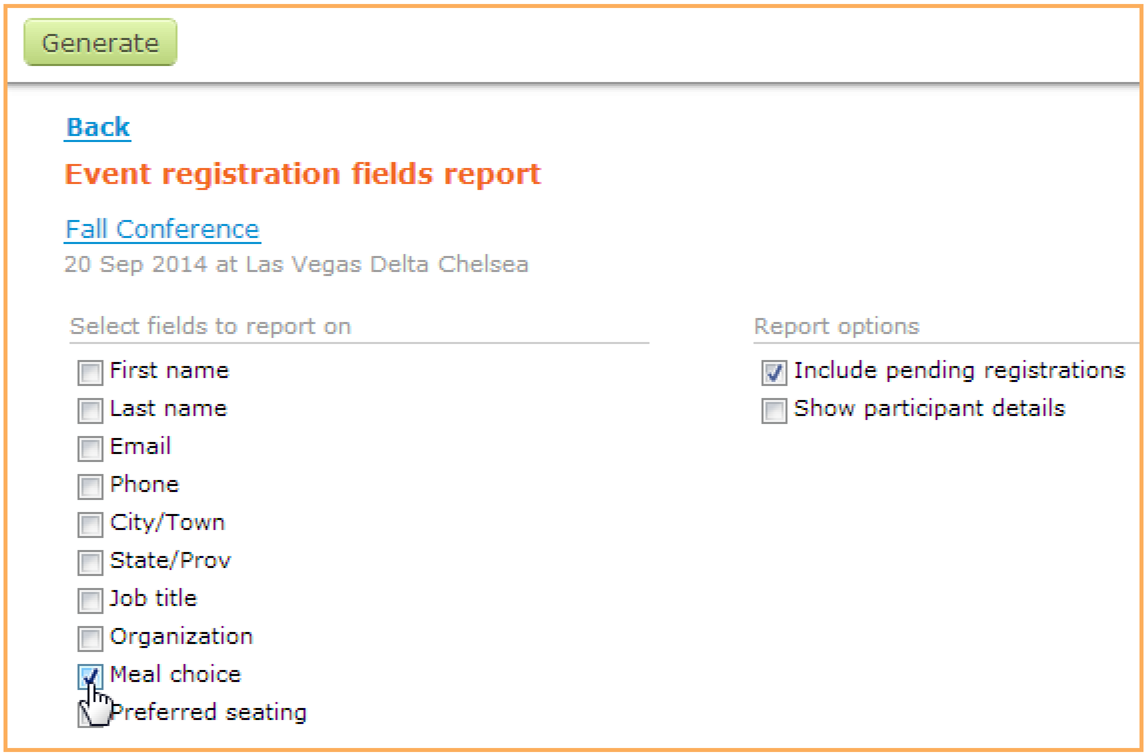
Registration fields report

If your event registration form includes options such as meal choices or special seating, you can generate a report summarizing the choices made by event registrants.

To generate the registration fields report, follow these steps:

Read more/less

1. Click the **Reports** button from the event details screen and select the **Registration fields** option.
2. On the next screen, select the registration fields to be reported on, and indicate whether to include pending registrations and show participant details.



3. Click **Generate** .

If you didn't choose to show participant details, a simple count will be displayed:

If you chose to show participant details, the report will display the name, email, registration status, and attendance status for the registrants for each choice.

Event registration fields report

Annual General Meeting
01 Sep 2015 at Downtown Sheraton

Fields and options	Selected	Participant details				
Food choice		Event attendee	Organization	Email	Status	Checked in
Chicken	6	Bartlett, Stephen	B & B Designs	sbartlett@test.com	confirmed	Yes
		Dixon, Jackie	Dixon Designs	jdixon@test.com	pending	No
		Grace, Georgia	Graceland	gg@test.com	confirmed	No
		Hynde, Christine	Typeline	chynde@test.com	pending	No
		Rose, Carly	Font House	crose@test.com	confirmed	No
		Sandino, Augusto	Design Partners	sandino@test.com	pending	No
Halal	1	Ashwal, Amria	Design Planet	aashwal@test.com	pending	No
Vegetarian	2	Mann, Terence	Mann Oh Mann	tmann@test.com	pending	No
		Perruzza, Jeannie	JP & Associates	jperruzza@test.com	confirmed	Yes
No entry	1					

Video: Viewing event registration information (5:49)

On this page:

Expand all sections

See also:

- Setting up events
- Customizing event registration forms
- Searching for contacts with event registrations
- Tracking event attendance

Searching for contacts with event registrations

Searching for contacts with event registrations

As people register for events on your Wild Apricot website (see Customize event registration form), or as you record them manually (see Adding event registrants manually), they are automatically added to the contact database (if they are not there already). Whether guests are automatically added to your contact database depends on the **Guest registration option** you choose for each event from the event details.

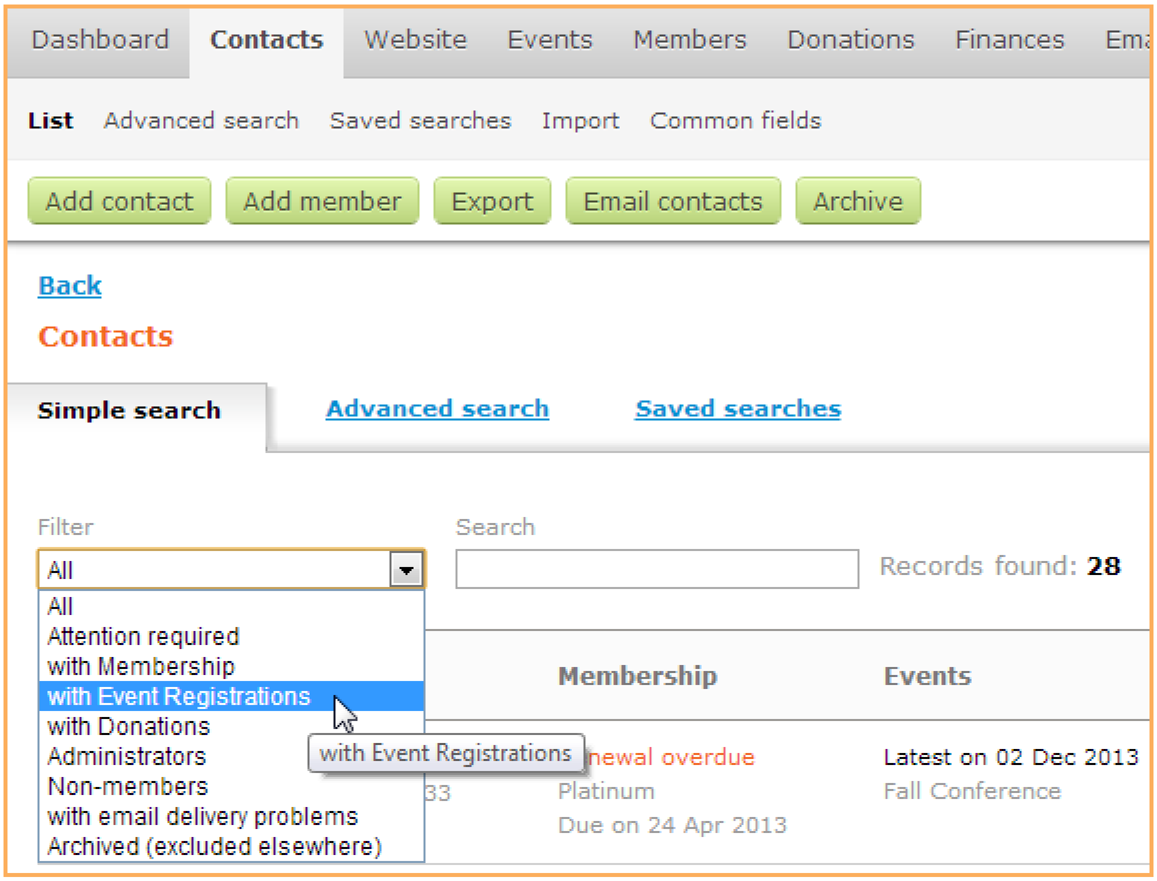
You can search for all event registrants, only for certain types of registrants, or only for certain events.

SHOW ME (2:20)

Searching for all event registrants

To view a list of all contacts who have registered for at least one event – either as the main registrant or as a guest – hover over the **Contacts** menu and select the **List** option. From your contact list, select the **with Event Registrations** filter.

Read more/less



With your contact list filtered to display only event registrants, you can send an email blast to them by clicking the **Email contacts** button. To export the list of event registrants, click the **Export** button.

Clicking on an entry will take you to the contact details for that registrant. From the Contact details screen, you can view and edit contact information, and use the **Prev** and **Next** button to browse through other contact records in the list.

To see all their event registrations, click on the **Events** tab.

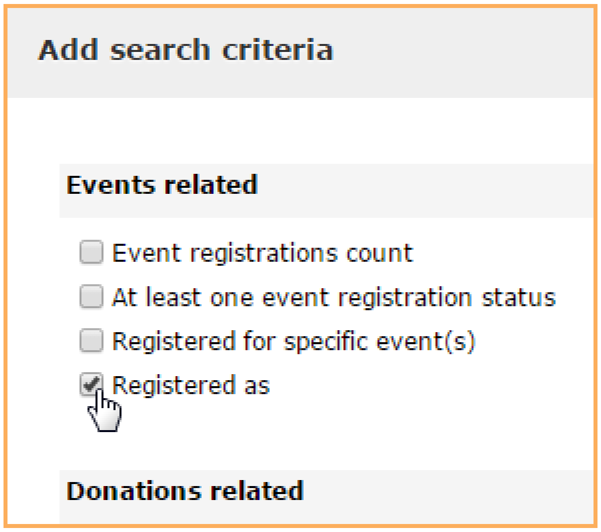
Searching for types of registrants

Instead of searching for all registrants, you can search just for main registrants or guests. From your search results, you can send an email blast to the registrants, and save the search for future use.

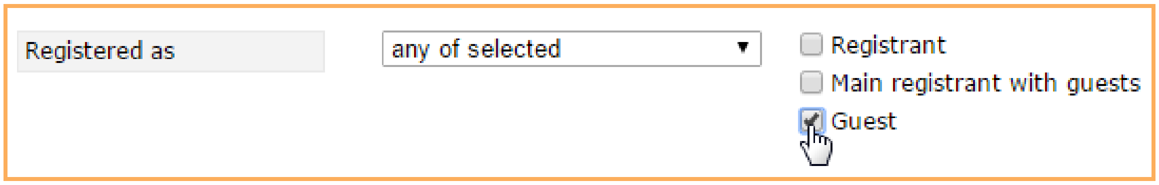
To search for particular types of registrants, follow these steps:

Read more/less

1. Hover over the **Contacts** menu and select the **Advanced search** option.
2. Click the **Add criteria** button and chose the **Registered as** option then click **OK**.



3. Within the **Registered as** entry, choose the type of registrant you want to find.



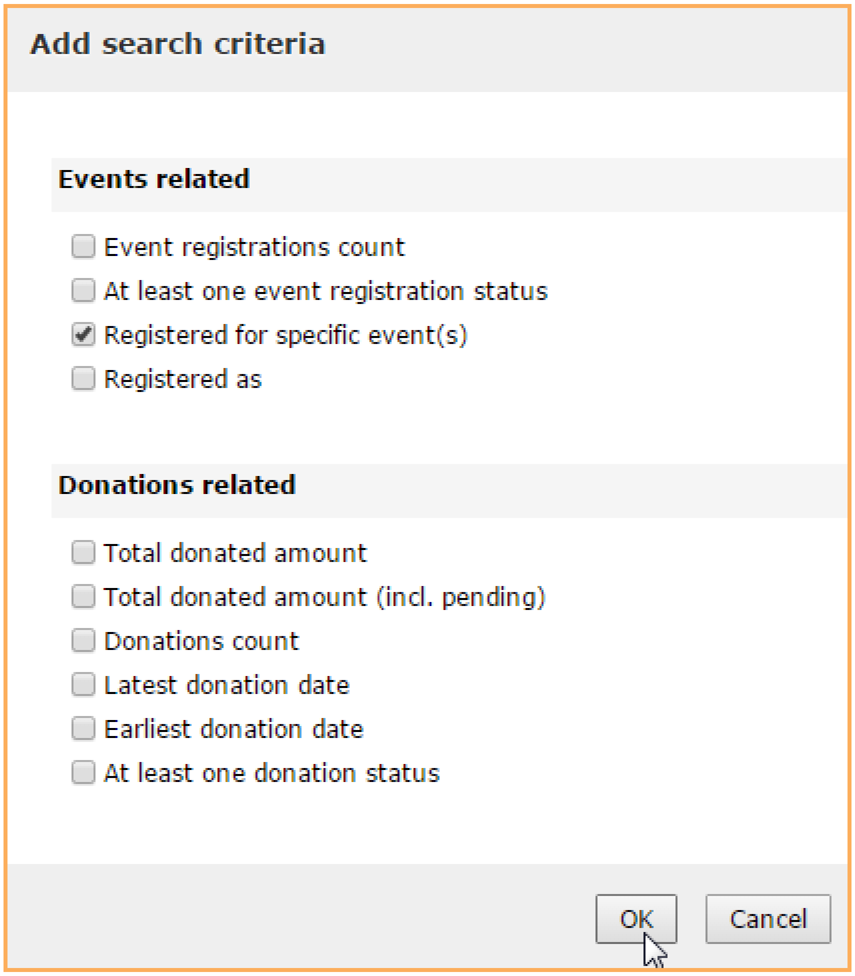
4. To save the search for future use, enter a search name then click **Save**. Otherwise, click **Search**.

Searching within specific events

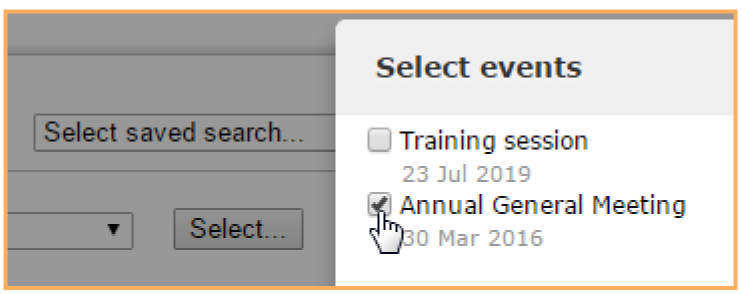
You can search for registrants registered for a particular event. To do so, follow these steps:

Read more/less

1. Hover over the **Contacts** menu and select the **Advanced search** option.
2. Click the **Add criteria** button and chose the **Registered for specific event(s)** option then click **OK**.



3. Click the **Select** button and choose the event(s) you want to search.



4. Click the **Search** button to find all registrants for the selected event(s), or click the **Add criteria** button to add more criteria such as the **Registered as** option (main registrant or guest).

Next steps

Once you have your search results, you can:

- Send an email blast to the registrants by clicking the **Email contacts** button.
- Export the results to a spreadsheet by clicking the **Export** button.
- Archive the registrants by clicking the **Archive contacts in this list** button.
- View individual contact details by clicking on contacts within the list, then use the **Prev** and **Next** button to browse through other contact records in the list.

On this page:

- Searching for all event registrants

Expand all sections

See also:

- Viewing event registration information

Tracking event attendance

Tracking event attendance

For each event registration, you can record whether the registrant has actually attended the event. You can check in a registrant – record their attendance – from the registrants list on the browser version of Wild Apricot, or using Wild Apricot's mobile app.

If you don't have a computer at the event, you can generate and print an attendance report that you can use to manually record attendance. You can then use the completed attendance report as a reference while recording attendance in Wild Apricot.

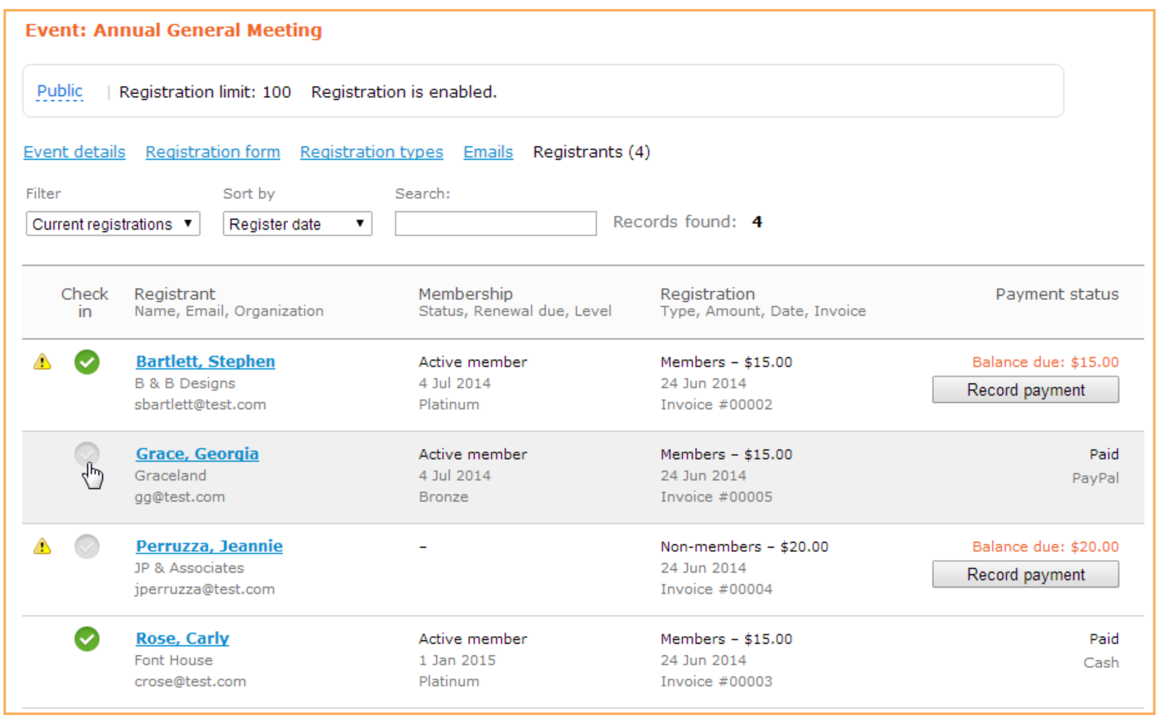
After you've recorded the attendance for an event, you can view the number and percentage of attendees from the events list.

Recording attendance

From the browser version

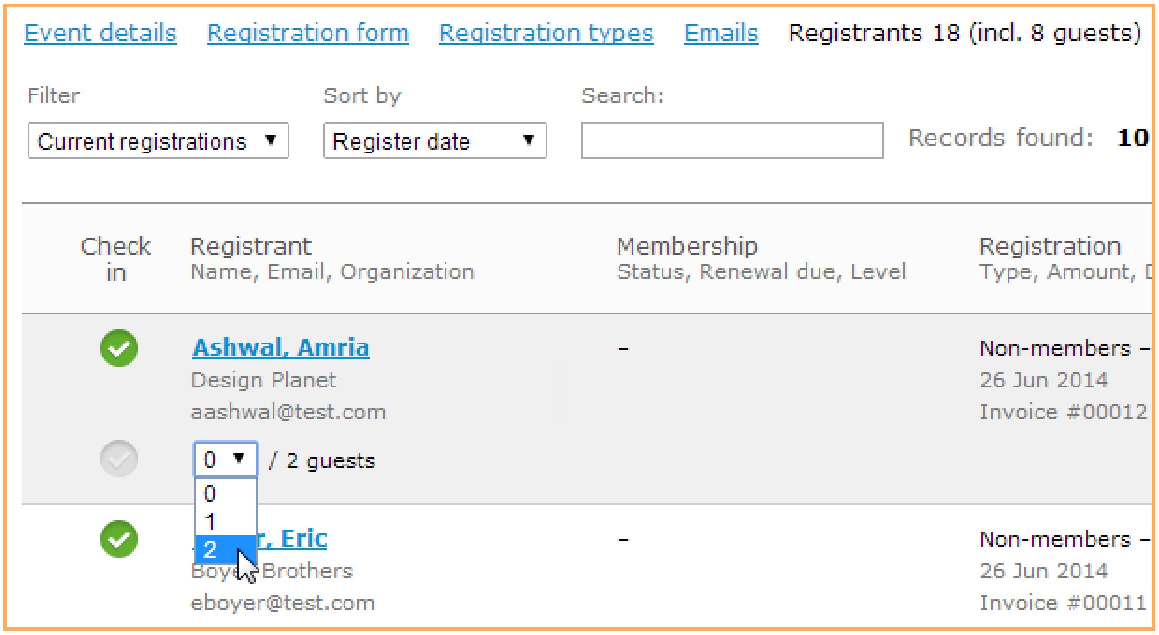
To check in a registrant from the browser version of Wild Apricot, click the **Registrant & invitees** link to view the list of registrants, then click the grayed out circle button beside the registrant's name (under the **Check in** column).

Read more/less



> Only full administrators and event managers can check in attendees. For information on administrator types, see Managing site administrators.

To check in a single guest, click the grayed out circle button beside the name of the guest or the number of guests (depending on your guest registration settings). If there are multiple guests for a particular registration, you click the dropdown displaying the number of guests and select the number of guests to be checked in.

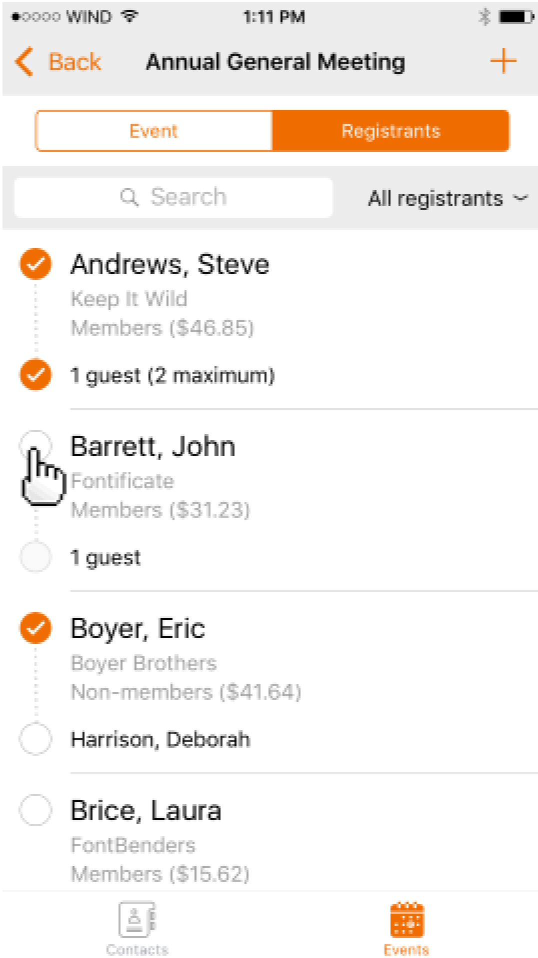


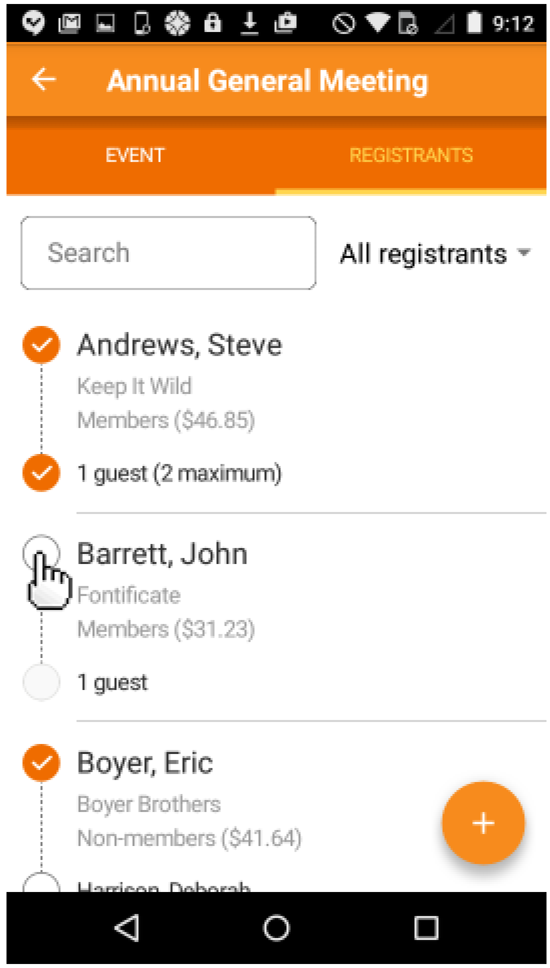
The **Check in** button will be automatically checked.

From the mobile app

On Wild Apricot's mobile app, you check in a registrant by tapping the open circle (iOS) or square (Android) beside the registrant's name, within the registrants list or within the registration details.

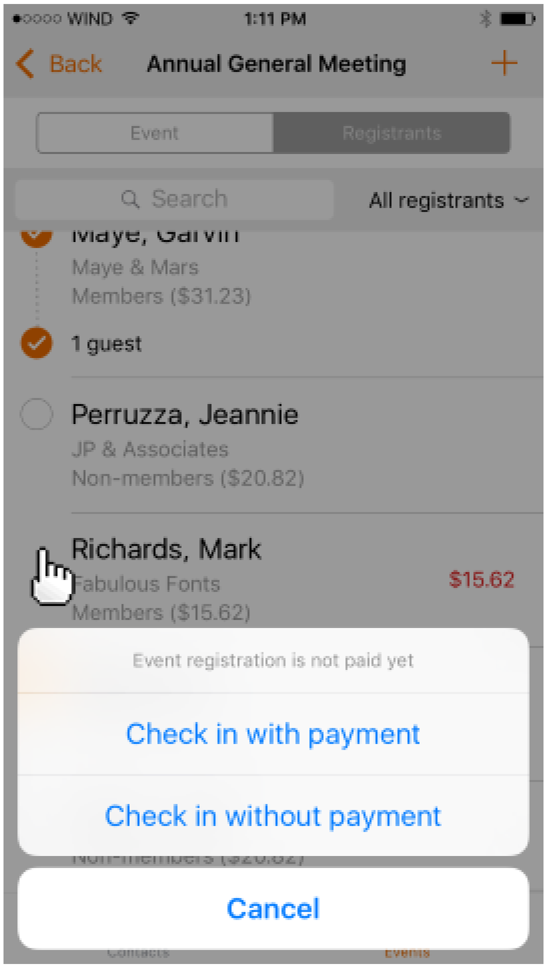
Read more/less

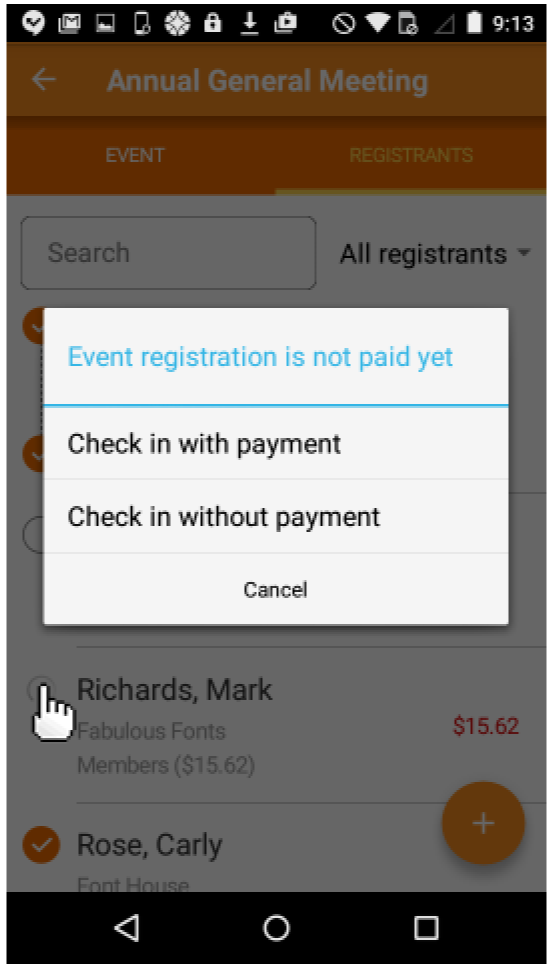




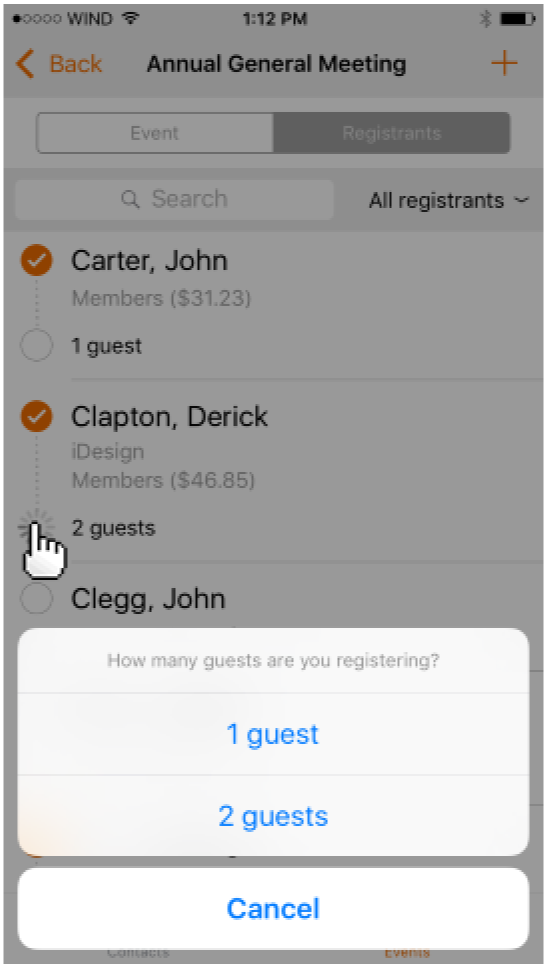
A check mark indicates that the registrant has been checked in. To undo a check in, tap the check mark beside the checked in registrant's name.

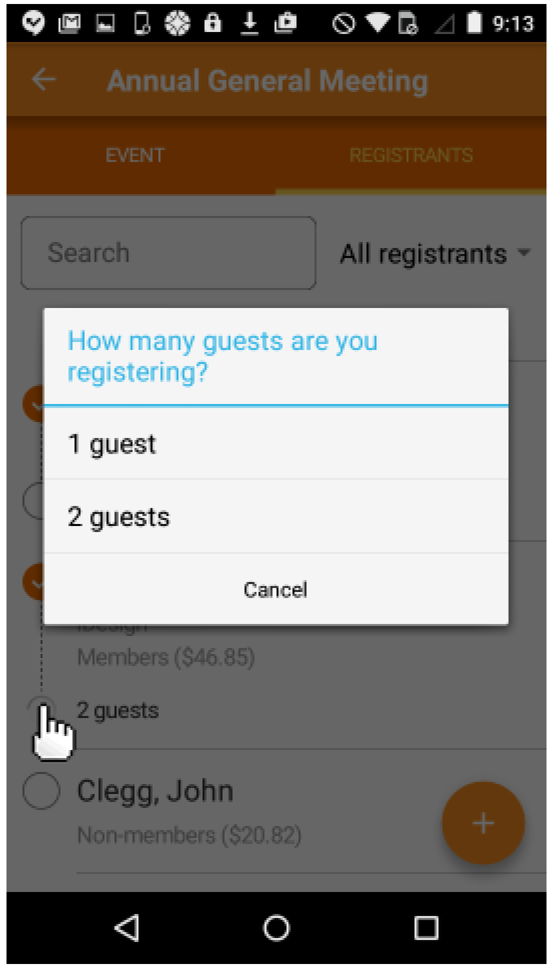
If you are checking in a registrant who hasn't fully paid the registration fee, you will be asked whether you want to check in the registrant with or without payment.





To check in a single guest, tap the open circle or square beside the name of the guest or the number of guests (depending on your guest registration settings). If there are multiple guests without contact or registration information under a particular registration, you tap the open circle or square then select the number of guests to be checked in.



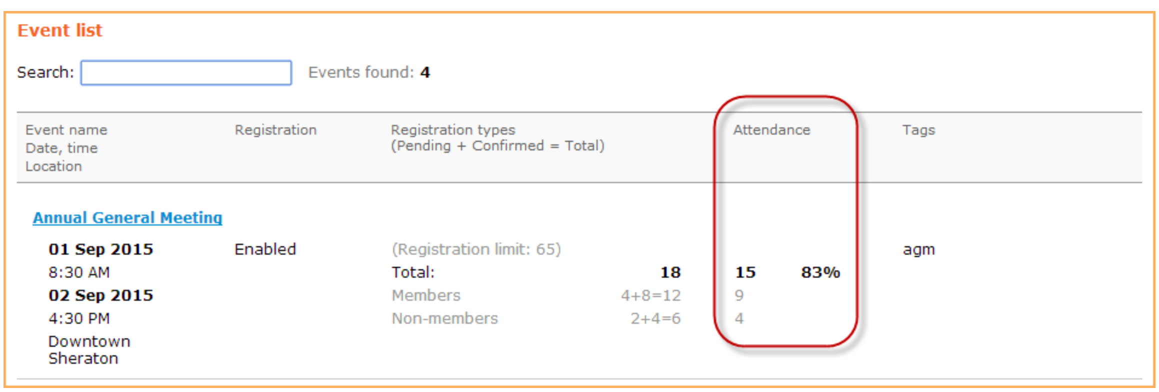


Viewing attendance information

On the browser version

Within the events list, the number and percentage of attendees for each event appears under the **Attendance** column.

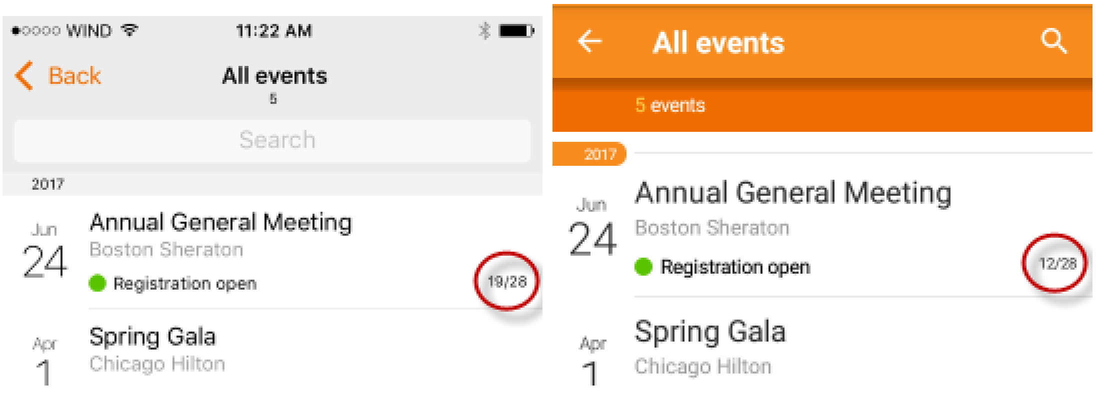
Read more/less



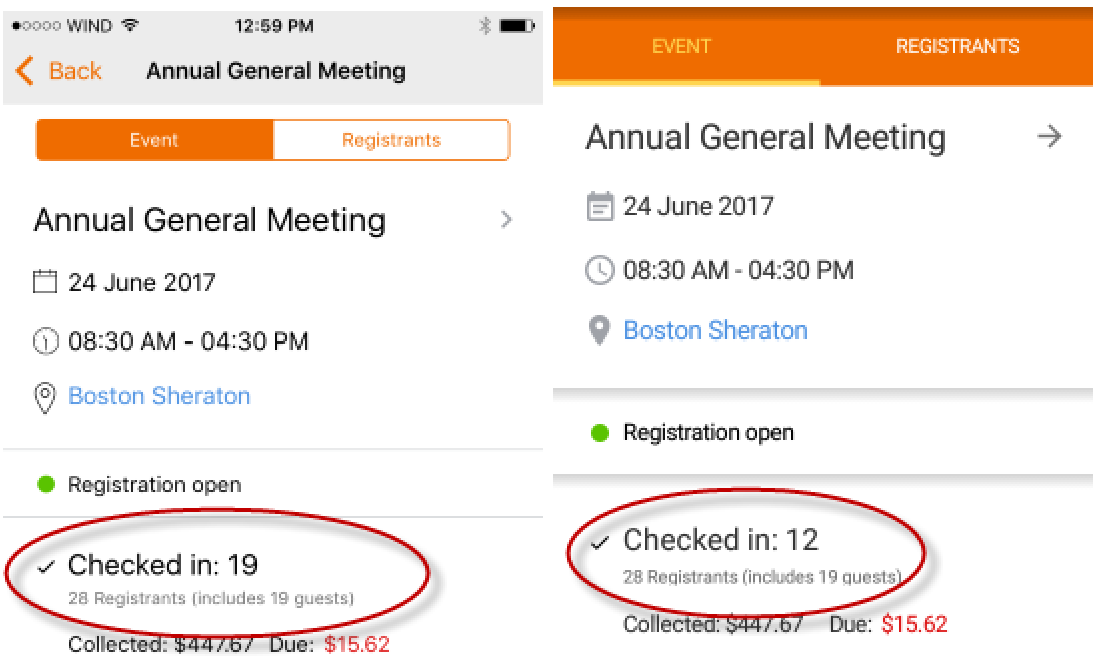
On the mobile app

On Wild Apricot's mobile app, the number of registered and checked in registrants (including guests) are displayed for each event in the events list...

Read more/less



...and on the event details screen.



Generating an attendance report

You can generate and print an attendance report that you can use to manually record attendance at an event.

Read more/less

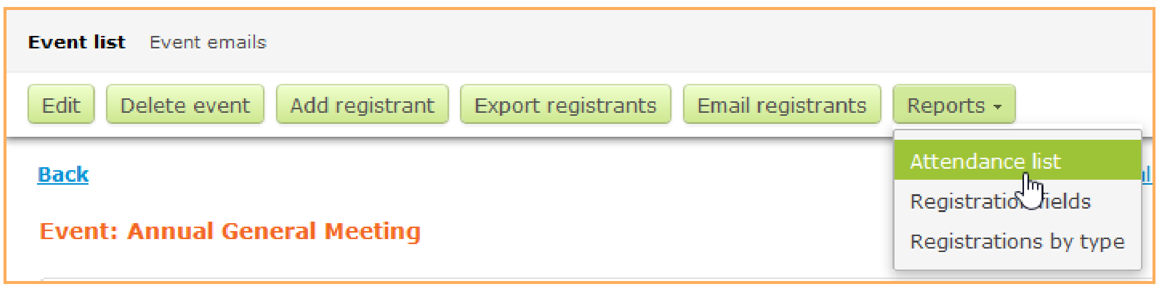
Attendance list – Annual General Meeting
01 Sep 2015, Downtown Sheraton

Showing: 23 of 23 — Created 15 Jul 2014

Registrant	Membership	Registration	Amount due	Notes
Maye, Garvin Maye & Mars / 1 guests	Active member 13 Jul 2015, Silver	Members $30.00	**$30.00**	
Blake, Bob	–	Non-members $20.00	**$20.00**	
Barrett, John Fontificate	**Renewal overdue** 29 May 2014, Silver	Members $15.00	**$15.00**	
Caslon, William Calson Consulting	**Renewal overdue** 4 Jul 2014, Gold	Members $0.00	–	
Ashwal, Amria Design Planet / 2 guests	–	Non-members $60.00	–	

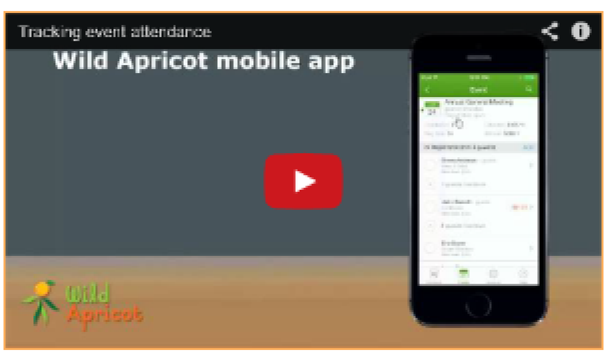
Before generating the report, you can sort and filter the list of registrants to control the order and narrow the scope of the report.

To generate an attendance report, click the event within the event list, then click the **Reports** button and select the **Attendance list** optio n.



Checking in attendees at multi-session events

Currently, checking in attendees takes place at the event level, so attendees cannot be checked in for individual sessions.



Video: Tracking event attendance (2:56)

On this page:

    - On the mobile app
- Generating an attendance report
- Checking in attendees at multi-session events

Expand all sections

See also:

- Viewing event registration information

Cancelling events and registrations

Cancelling events and registrations

You can cancel an entire event, or cancel individual event registrations. In either case, you have options for dealing with the registration fees that have already been paid.

Cancelling events

After setting up an event and accepting registrations and payments, you may choose to cancel the entire event. There are two different ways to handle this within Wild Apricot: delete the event altogether (see below) along with any existing registrations, or keep the event in your event database but disable new registrations and cancel each registration individually.

Deleting events

Deleting an event will automatically delete all registration invoices for the event. (The deleted invoices can be found in the audit log, along with a record of their deletion.) However, refunds will not be automatically issued, and any registration fees already paid will remain as credits on the registrants' accounts. You can issue refunds for the registration fees or simply inform the registrants that the fee has been credited to their accounts and can be applied to future fees.

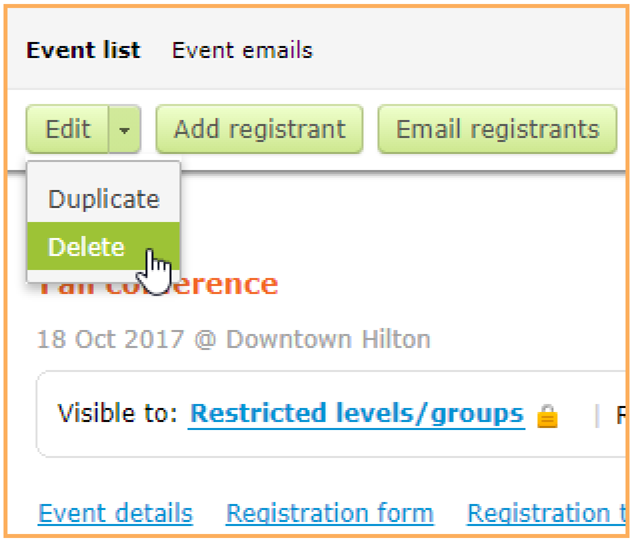
> ⚠ A deleted event cannot be restored.

Any registrants added as contacts as part of the registration process will remain in the contact database.

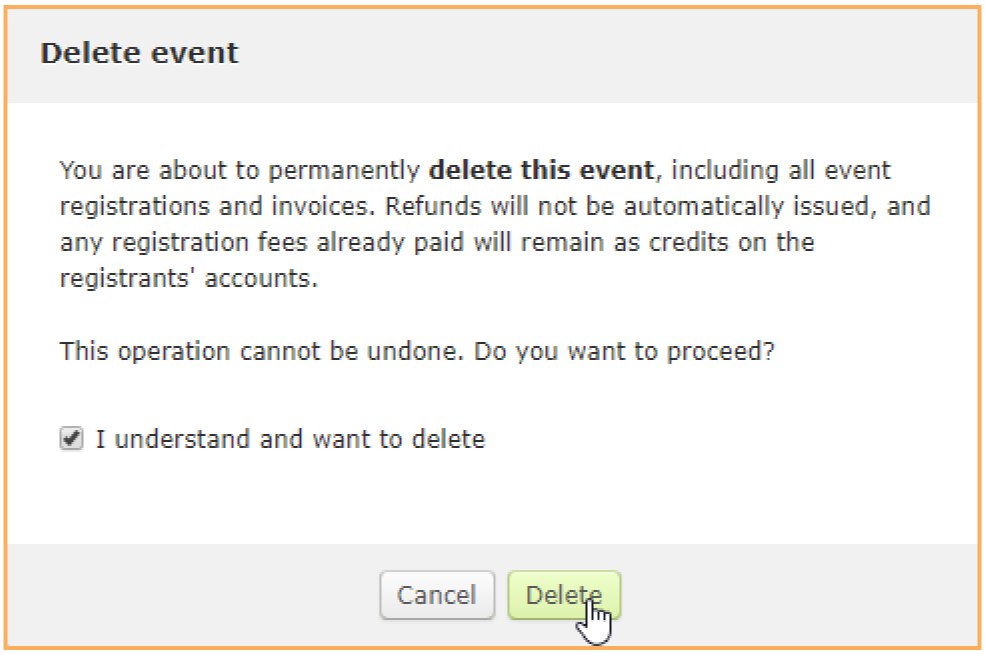
Before deleting an event, you should send an email to all event attendees, since the attendee list will no longer be available once the event is deleted.

To delete an event, follow these steps:
Read more/less

1. Hover over the **Events** menu and select the **Event list** option.
2. Click the name of the event to be cancelled within the events list.
3. Click the down arrow beside the **Edit** button and click the **Delete** option.



4. You will be prompted to confirm the deletion by checking the **I understand and want to delete** checkbox then clicking the **Delete** button.



Archiving an event

There is no explicit option for archiving an event but you can achieve the same result by changing the event access setting to admin only and disabling registration for the event. The event – including registration information – will be visible only to administrators.

Cancelling individual registrations

After registering for an event, an individual may wish to cancel their registration. Registrants cannot themselves cancel an event registration – only an administrator can do so.

When you cancel an event registration, the registration invoice is automatically voided. (The voided invoice can be found in the audit log, along with a record of its voiding.) If the registration fee was already paid, it will not be automatically refunded. Instead, the registrant's account will be credited the amount of the fee. You can issue a refund for the registration fee or simply inform the registrant that the amount has been credited to their account and can be applied to future fees.

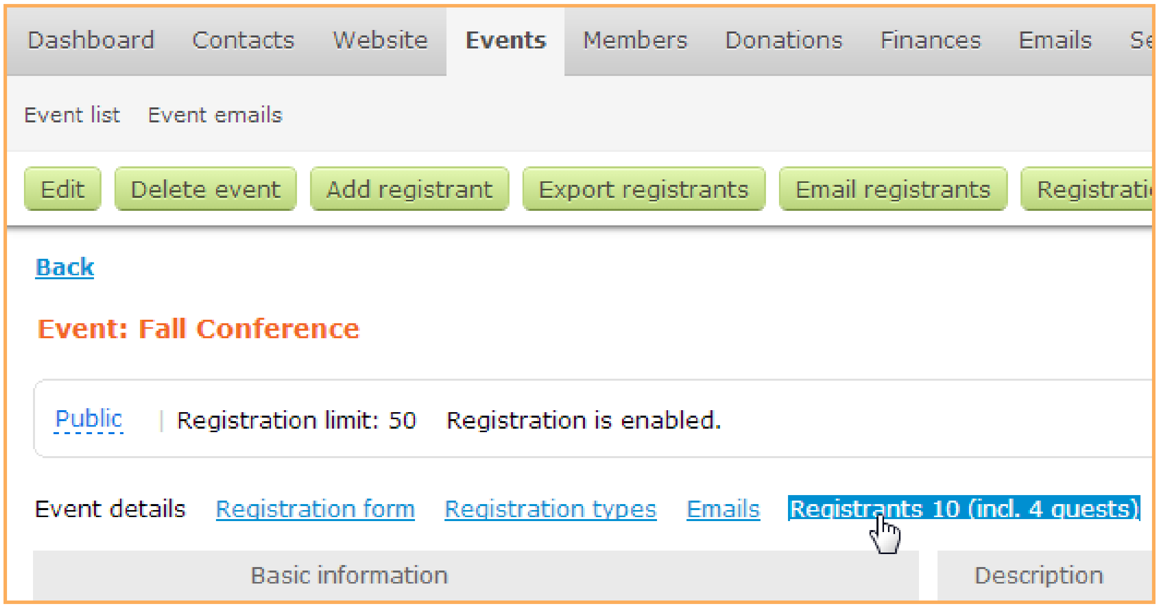
If you have chosen to impose a cancellation fee, you can issue a manual invoice to the registrant then settle the registration fee payment to the invoice and the refund.

If added as a contact as part of the registration process, the registrant will remain a contact.

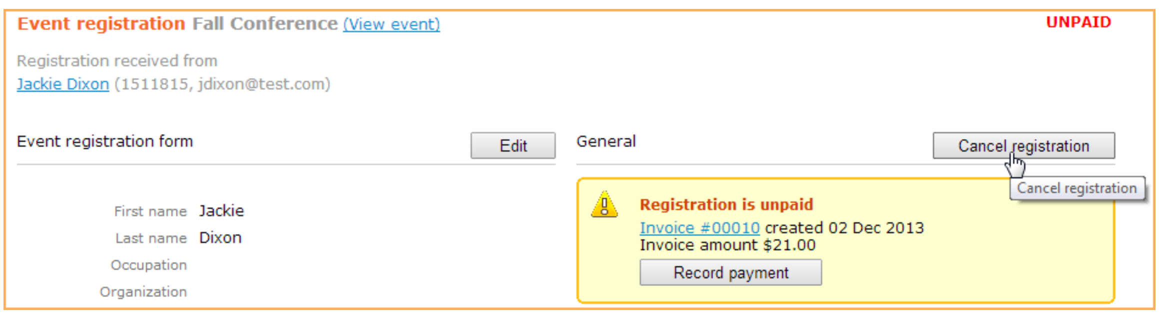
To cancel an individual registration for an event, follow these steps:

Read more/less

1. Hover over the **Events** menu and select the **Event list** option.
2. Click the name of the event within the events list.
3. Click the **Registrants & invitees** link.



4. Within the registrants list, click the row showing the registration you want to cancel.
5. From the registration details screen, click the **Cancel registration** button.



6. Enter a note explaining the reason for the cancellation then click **OK**.

To restore a registration immediately after cancelling it, click the **Restore** button.

On this page:

- Cancelling events
- Deleting events
- Archiving an event
- Cancelling individual registrations

Expand all sections

See also:

- Setting up events

Reports

Reports

Wild Apricot offers the following built-in reports:

Financial reports

- Income report – summary of your income based on the invoices in the system within a selected period and by transaction type.
- Payments report – summary of payments, donations and refunds, in other words your cashflow transactions. Based on the payments and refunds in the system, within a selected period and by tender type.
- Donations report – similar to Payments but focused on Donation payments only
- Event payments report by registration type – shows each event's registrations, fees and payment received broken down by registration type
- Aging receivables – list of all contacts with outstanding balances classified by outstanding days.
- Account statement – statement report for a particular account - list and totals of invoices, payments, refunds and donations.
- Tax summary and details – for taxes billed and collected during different time periods.

Event registrations report

- Event registration report - shows what selections your confirmed and pending registrants have made for your events.
  This is very handy for quickly determining the number of participants who have made a particular selection (e.g. How many want the chicken over the fish for lunch?), and also identifying which participants might have made special requests (e.g. Jim Dial specifically asked for a vegetarian option).

Member reports

- Advanced search - Members - To find a group of members by a particular set of attributes - you can subsequently export the result into Excel.
  - Custom reports layouts - advanced member searches show a predetermined set of fields for each member. Custom report layouts allow to chose which fields are displayed in the search results.

Contact reports

- Advanced search - Contacts - same as advanced member search - perform more complicated searches (e.g. all donors who donated a certain amount) you have to use advanced search.

Creating reports using external tools

In addition, you can also create your own reports using software available outside of Wild Apricot. You can export your contact or financial data from Wild Apricot then import it into software like Excel and QuickBooks, or you can use Wild Apricot's API to create your own custom programs that automatically retrieve data from your Wild Apricot account. To help get you started with Wild Apricot's API, a sample Excel file has been provided that uses API calls to download contact records and other information from Wild Apricot accounts.

On this page:

See also:

- Tracking website traffic

Emails

Emails

Using Wild Apricot, you can email members and other contacts, either manually or automatically.

What you need to know

Click/tap to expand/collapse

- There are two kinds of emails sent from Wild Apricot sites: automatic and manual. *Automatic emails* are sent in response to a variety of member actions, including membership application, event registration, and invoice payment. You can turn off most of these emails and in many cases, control who receives them and when . *Manual emails* are emails you send yourself, like email blasts and e-newsletters. You can control who receives your email blasts by searching or filtering your member list or contact list.
- You can send an email blast immediately or schedule it to be delivered automatically at a particular date and time.
- You can create your email blasts from scratch, use a previously sent email, or choose one of the professionally designed email templates provided by Wild Apricot.
- You can use macros to personalize automatic emails or email blasts, including specific information about the recipient, such as first name or organization name.
- From the email log, you can view each message and its delivery status, and a list of the failed and delivered email addresses. If you have email tracking enabled (which is disabled by default), you can see the number of clicks for each link, and whether each message was opened and which links the recipient clicked on.
- You can set up email routing to automatically send copies of system emails to administrators and/or other recipients.
- The maximum number of email recipients you can choose for each message depends on your billing plan .
- If you add recipients using a saved search, the search will be performed when the email is sent.
- Only one email will be sent to each unique email address even if you add a recipient multiple times (directly or through groups and searches).
- Once you send an email blast, it is added to the email queue, and may take anywhere from a few minutes to a few hours to be actually delivered.
- If an {Unsubscribe_Url} macro does not appear in your email, one will be automatically appended to the message.
- Wild Apricot does not provide email hosting service

How do you...?

Click/tap to expand/collapse

- Send an email blast
- Schedule an email blast
- Archive an email blast
- Save an email blast as a web page
- Insert a macro
- Enable email tracking
- Set the reply-to address
- Create mailing lists
- Add Wild Apricot servers to your whitelist
- Export the email log
- Troubleshoot email delivery problems
- Automatically send copies to others
- Turn off automatic emails
- Unsubscribe to emails
- Use Wild Apricot with email hosting services
- Comply with anti-spam regulations

Troubleshooting

Click/tap to expand/collapse

Emails appear differently on different mobile devices

- On Apple iOS devices, email content will automatically reflow from multiple columns into a single column. On all other mobile devices, multiple columns are maintained but the columns will be narrowed.

AOL is rejecting all my email messages

- AOL email servers automatically reject all incoming 3rd party email domains that start with AIM or AOL (e.g. an email coming from "info@AimAssociation.com" or "admin@AolAssociation.wildapricot.org" is not allowed). This means if your primary Wild Apricot domain starts with AIM or AOL (as in AimAssociation.com), Wild Apricot will use @AimAssociation.com as the FROM email for all outgoing emails, and all emails to anyone on AOL will bounce as a result for using an "unauthorized IP". To send emails to contacts with AOL email addresses, make sure your FROM email and REPLY-TO email domain do NOT start with @AIM or @AOL. You can check the current FROM email and default REPLY-TO emails in Organization details .

See also:

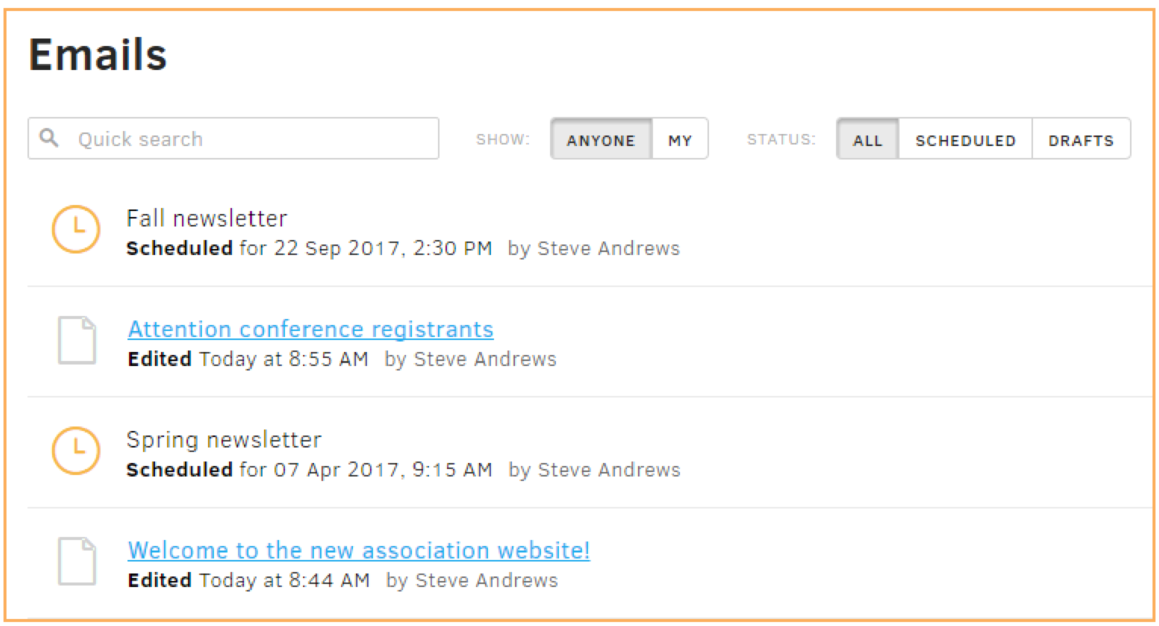
Click/tap to expand/collapse

- Emails list
- Sending email blasts
- Scheduling email blasts
- Using macros in emails
- Working with email drafts
- Using email templates
- Email log
- Tracking emails
- Managing undeliverable emails
- Routing of system emails
- Controlling the delivery of automatic emails
- Automatic emails schedule
- Unsubscribing to emails
- Providing an opt-in mechanism
- Complying with anti-spam regulations
- Using email hosting services
- Adding to email whitelists

Emails list

Emails list

The Emails list displays a list of all your unsent emails, including both scheduled emails and unscheduled email drafts.



To view the Emails list, hover over the **Email** menu and click **Emails**, or just click the **Email** menu.

To view your sent emails, go to the email log.

For each email, the subject of the email is displayed, along with the date of the last change, and the name of the person who last updated it.

Filtering the list

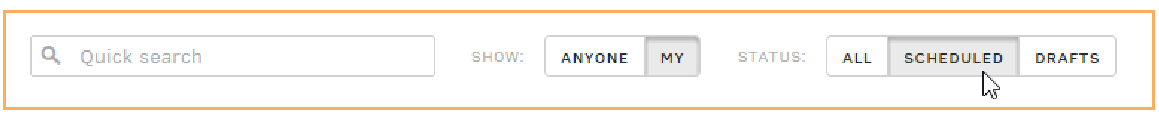
You can filter the Emails list in several ways:

Read more/less

- To show only those emails whose subject or details matches a particular search string, enter that string in the **Quick search** field .

- To show only those emails that you have created or edited, set the **Show** filter to **My**. To show all emails, set the **Show** filter to **A nyone**.

- To show just scheduled emails, set the **Status** filter to **Scheduled**. To show just unscheduled email drafts, set the **Status** filter to **Drafts**. To show all emails regardless of status, set the **Status** filter to **All**.

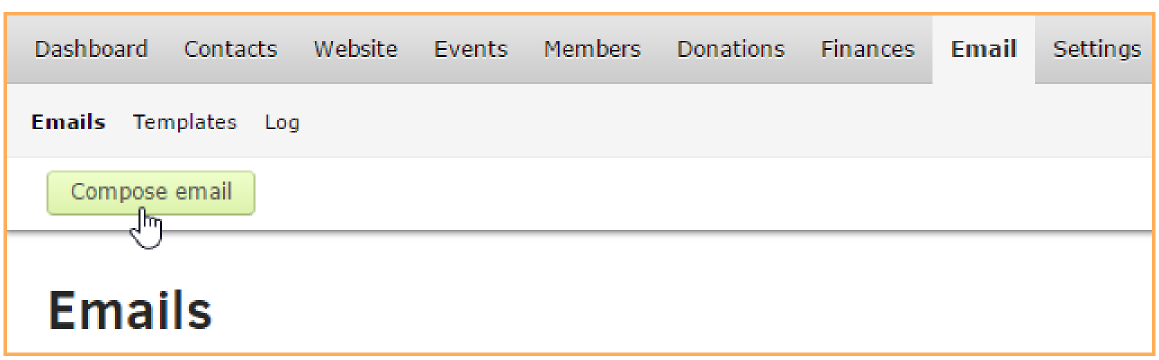


These filter options work in combination. For example, if you set the **Show** filter to **My**, set the **Status** filter to **Scheduled**, and enter a search string in the **Quick search** field, then only scheduled emails that you have created or modified that match the search string will be displayed.

Creating a new email

To create a new email from the Emails list, click the **Compose email** button towards the top of the screen.

Read more/less



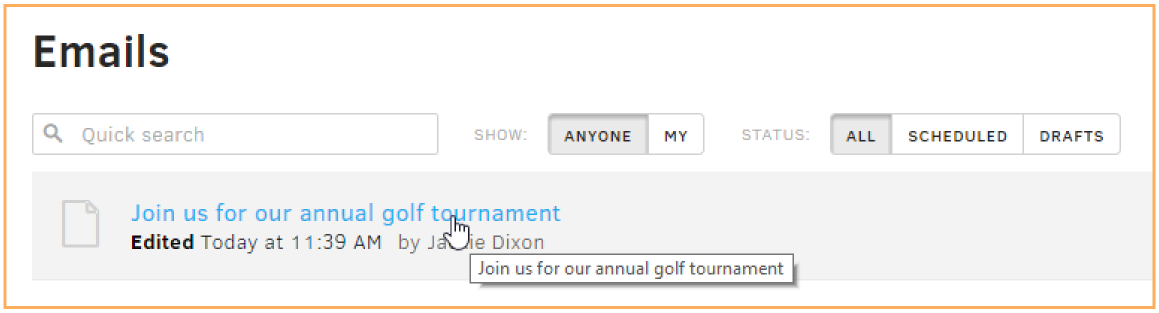
An email wizard will appear to walk you through the steps involved in composing and sending your email blast. You can move to the next step in the email wizard by clicking the **>** button, and to the previous step by clicking the **<** button. You can jump from one step to another at any time by clicking the tab name.

For more information, see Sending email blasts.

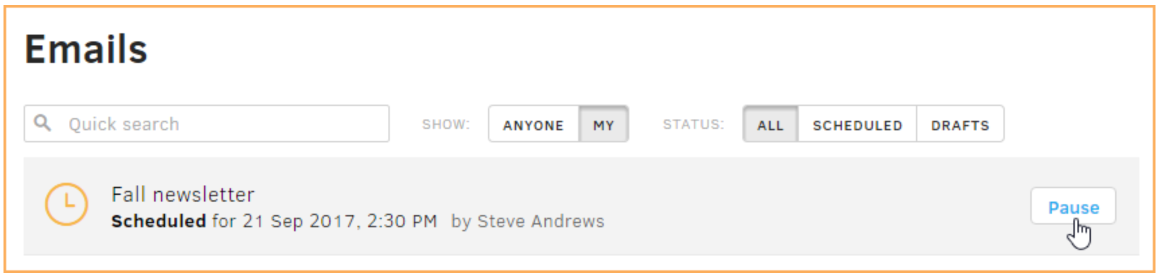
Modifying an existing email

To resume editing an unscheduled email draft, click on its subject within the list.

Read more/less



To modify a scheduled email, you have to pause it by hovering over the email within the Emails list and clicking the **Pause** button.

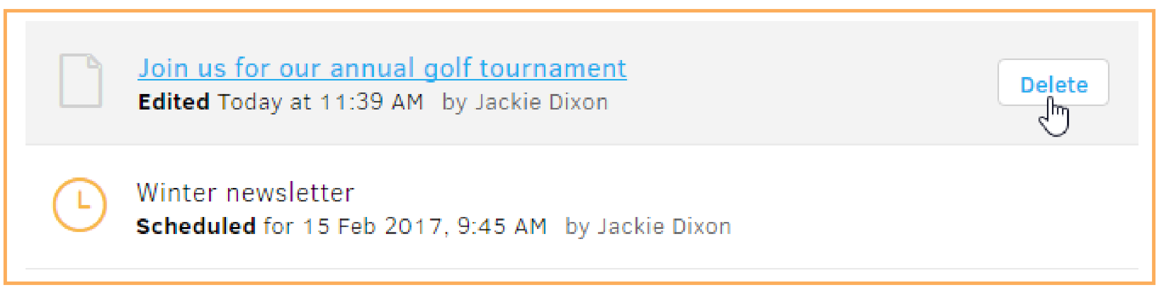


Now, you can click the email subject to open the email wizard and modify your message.

Deleting an email

To delete an unscheduled email draft, hover over the draft within the list and click the **Delete** button at the end of the row.

Read more/less



To delete a scheduled email, hover over the email, click the **Pause** button, then click the **Delete** button.

Deleting the draft will remove it permanently.

On this page:

Expand all sections

See also:

- Sending email blasts
- Working with email drafts
- Scheduling email blasts

Sending email blasts

Sending email blasts

You can use Wild Apricot to send mass emails, known as *email blasts*, to people in your contact database (members, attendees, donors, etc.). You can use email blasts to broadcast announcements or send out newsletters.

You can send an email blast immediately or schedule it to be delivered automatically at a particular date and time.

You can control who receives your email blasts by searching or filtering your member list or contact list, or by selecting a saved contact or member search.

You can choose one of the professionally designed email templates provided by Wild Apricot, create your email blasts from scratch, use a previously sent email. In either case, you can add text, graphics, and links, and control the layout and appearance of the message. To personalize the message, you can use macros to insert specific information such as the recipient's first name or organization.

Emails created using Wild Apricot's new generation of email templates are responsive – meaning that they will automatically adjust to fit smaller screens – and will appear the same on different email clients, subject to some variations.

After you've sent your email blast, you can track opened, clicked, and undelivered mail, and review email failures.

SHOW ME (5:07)

Getting started

There are a number of ways you can start putting together your email blast.

Read more/less

To start without selecting a template or any recipients, follow these steps:

1. Click **Emails** under the **Email** menu.
2. Click the **Compose email** button.

To start by choosing the template you want to use, follow these steps:

1. Click **Templates** under the **Email** menu.
2. Click on the template you want to use. Templates are grouped by type. Custom templates that you have created or copied yourself. The **Themed** templates are professionally designed templates in a variety of colors and styles, with sample content and graphics. The **Basic** templates are simple templates in a variety of layouts, with boilerplate text and no graphics.
3. Click the **Send email** option.

To start by choosing the contacts or members you want to email, follow these steps:

1. Click the **List** option under the **Contacts** or **Members** menu.
2. Search and filter the contact or member list to display only the contacts or members you want to email. For instructions on searching and filtering, see Contact list.
3. Click the **Email contacts** or **Email members** button.

You can also choose to email the registrants for a particular event by clicking the **Email registrants** button, or email contacts on an event waitlist by clicking the **Email waitlisted** button.

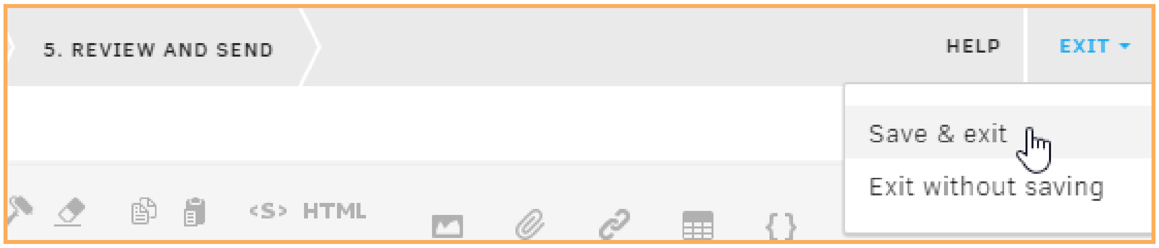
In either case, the email wizard appears to walk you through the steps involved in composing and sending your email blast. If you chose the template first, the email wizard will appear and take you to the **Design** tab, where you can begin customizing your email. If you selected the recipients first, you'll still be able to adjust the recipient list before sending the email blast.

You can move to the next step in the email wizard by clicking the **>** button, and to the previous step by clicking the **<** button. You can jump from one step to another at any time by clicking the tab name.

Saving and exiting

You can exit the email wizard at any time by clicking the **EXIT** menu in the upper right corner. You'll have the option of saving your changes and exiting, or exiting without saving.

Read more/less

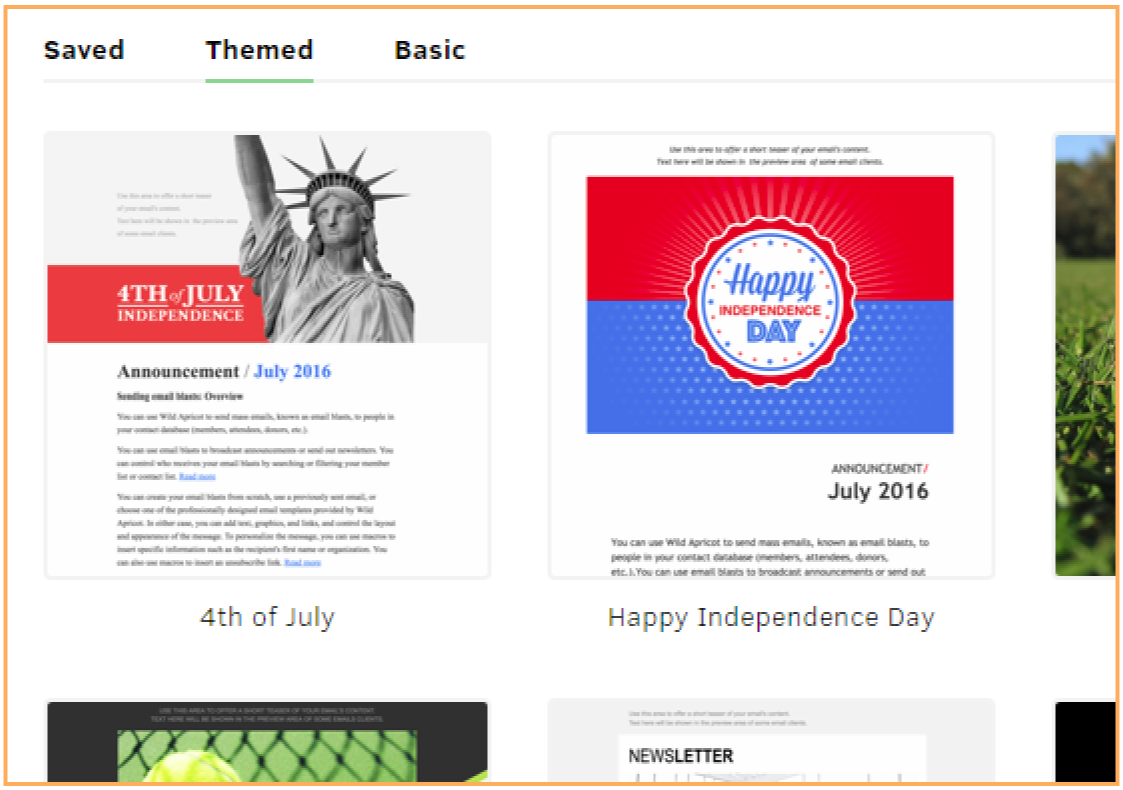


Step 1 - Choosing a template

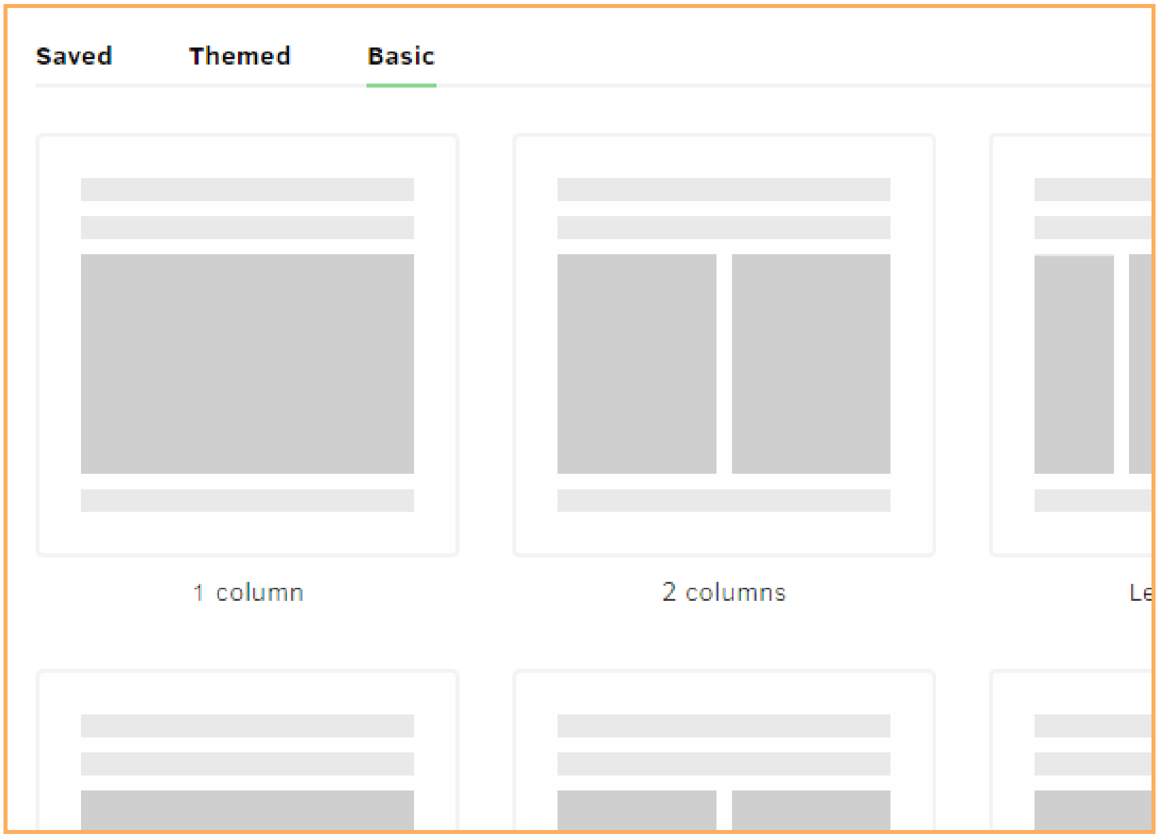
Unless you began by choosing a template, the first step in the email wizard is to select the template you want to use as the basis for the email.

Read more/less

Templates are grouped onto different tabs by type. Custom templates that you have created or copied are displayed on the **Saved** tab. On the **Themed** tab are professionally designed templates in a variety of colors and styles, with sample content and graphics.



On the **Basic** tab are simple templates in a variety of layouts, with boilerplate text and no graphics.



Among the basic templates are a **Simple** template, which consists of a single cell layout with no headers or footers – suitable for clients who want to send a plain message quickly – and a **No layout** template, which consists of a single content block and no layout or text formatting – suitable for clients who wish to design their own email templates from the ground up.

To choose a template, just click on it. You will be automatically taken to the design step, where you can compose and format your message .

Step 2 - Designing your email content

With the template selected, you can now design the content for your email blast. This can involve adding, replacing, and formatting text, as well as adding or replacing graphics, links, and macros. You can also modify the layout of the message and change other aspects of its appearance.

Read more/less

Wild Apricot email templates divide the message body into rows and columns. You can click individual cells to insert content and adjust cell settings.

A draft of your design will be automatically saved every 30 seconds. If you wish to exit without saving your changes, click the **EXIT** menu in the upper right corner and choose the **Exit without saving** option.

After you are finished designing your email content, go to the **Preview** tab to preview your message.

Adding and replacing text

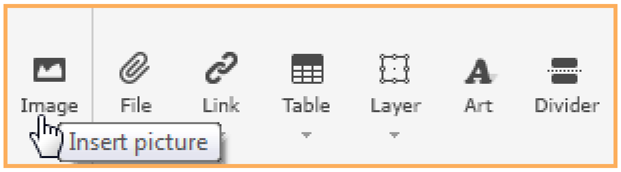
To add text to the email from the **Design** screen, simply click where you want the text to appear and start typing. To remove existing text, select it and press **Delete** on your keyboard to remove it or start typing to overwrite it.

You can format your text using the various toolbar options.

> For consistent results throughout your emails, you should format your text using text styles (e.g. H1, Normal, etc.) rather than individual font options (typeface, size, etc.).

Adding and removing pictures

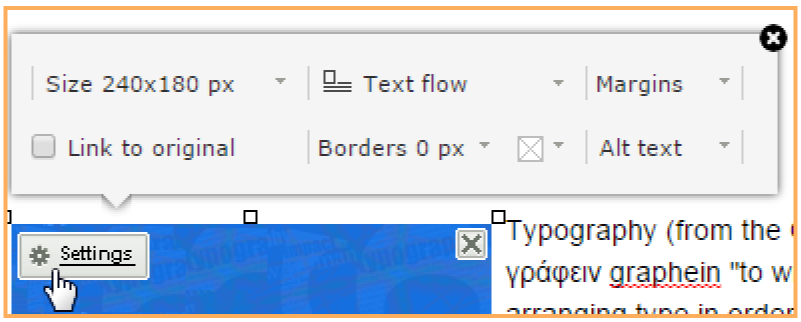
To add a picture to your template, click where you want the picture to appear then click the **Image** icon within the toolbar.



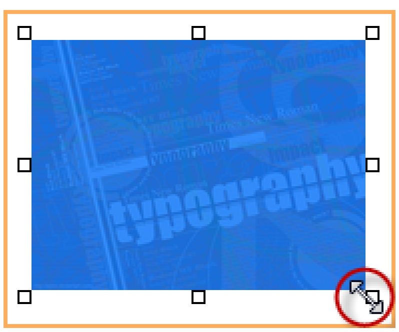
From the window that appears, you can choose a picture that is already in your account or upload new pictures from your computer or network. For more information, see Inserting and editing pictures.

> When you insert a picture, you are really inserting a link to the picture stored on your account. If you move, rename, or delete the image from your account, the image will no longer appear in your message. Instead of uploading and inserting pictures, you can edit the HTML code directly to display an image file stored on another website.

To set or change the properties of the picture, position your mouse over the picture in the template, then click the **Settings** option. From the image settings toolbar that appears, you can change any of the image image's properties, including s ize, alignment, margin, and borders, and how adjoining text wraps around the image.



You can also resize a picture by clicking on it then dragging its selection handles.



To remove an existing picture, position your mouse over the picture and click the **X** icon in the top right corner of the picture.

You can also delete a picture by selecting it then pressing the **Delete** key on your keyboard.

For more information, see Inserting pictures.

Adding and modifying links

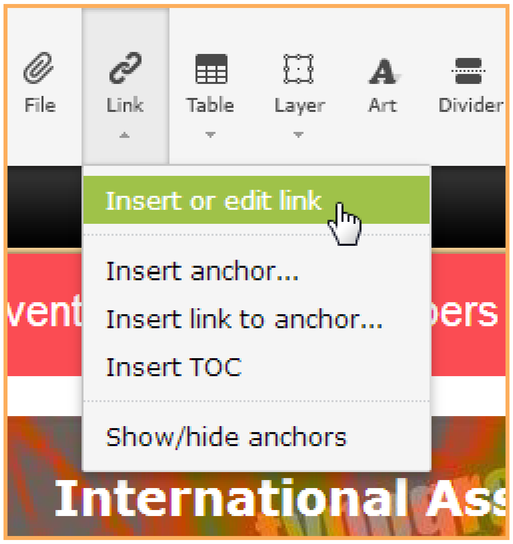
You cannot send attachments with your email blast, but you can insert links to online files and to files uploaded to your Wild Apricot account. For more information on uploading documents, see Inserting documents and files.

You can also insert links to a web site, site page, event page, or email address.

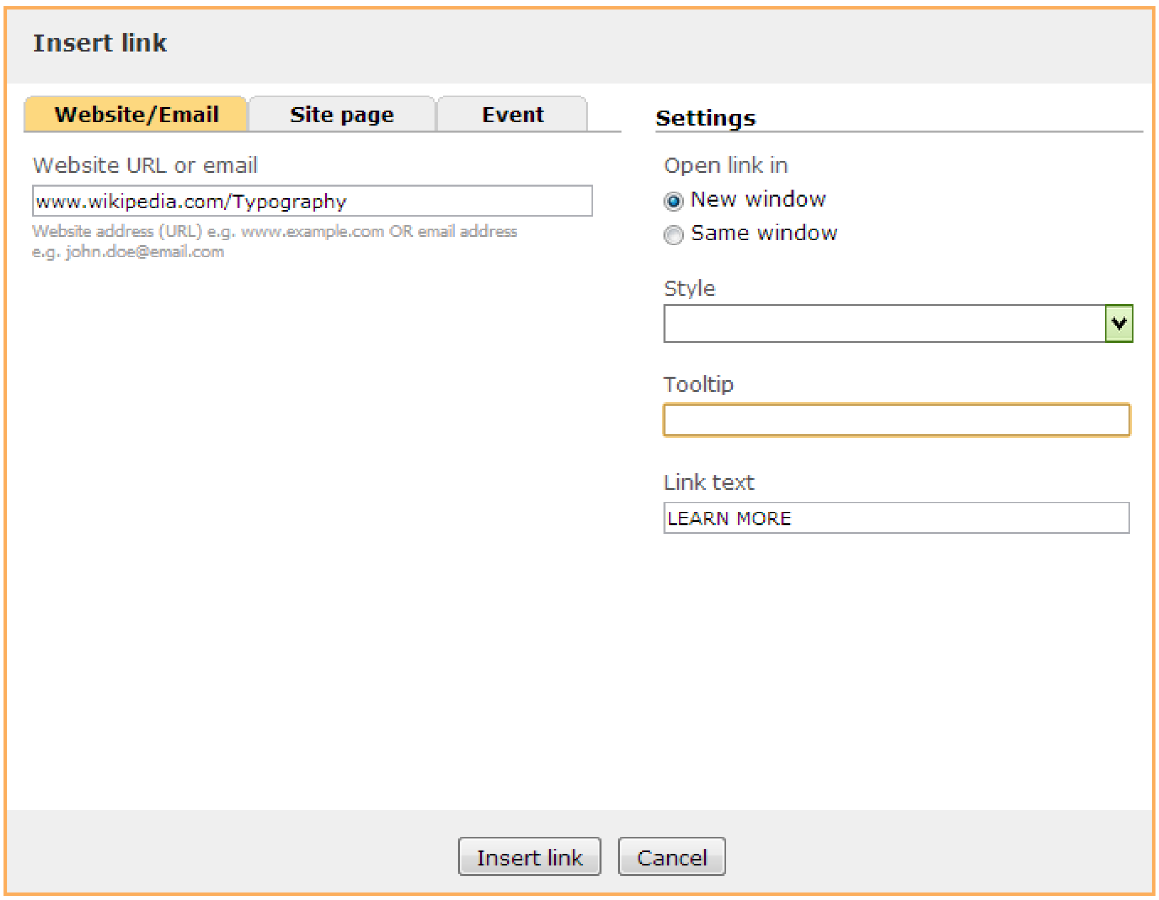
To insert a link in your email blast:

1. Click where you want the link to appear.

2. Click the **Link** dropdown in the toolbar towards the top of the page and select **Insert or edit link**.



3. From the Insert link window that appears, select the destination for the link.



Enter a website address or email address in the **Website URL or email** field, click the **Site page** tab to select a page from your site, or click the **Event tab** to select an event from your site. For events, you can choose whether to link to an event's detail page or registration page.

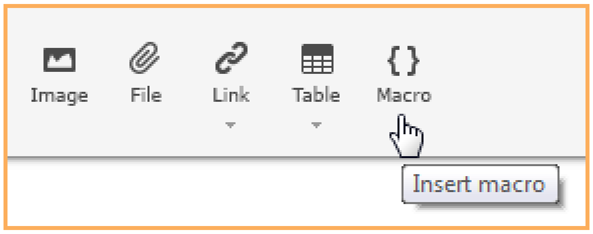
4. Enter the link text you want to display to the recipient.
5. You can also enter a tooltip to be displayed when a mouse pointer is positioned over the picture, and control whether the link opens in a separate browser window.
6. Click **Insert link**.

You can also link a picture to a document, web site, site page, event page, or email address. Before clicking the **Link** dropdow n, select the picture you want to link.

Personalizing the message with macros

Using macros, you can personalize your email blast to include specific information about the recipient such as first name or organization name.

To insert a macro in your email, click within the email where you want the macro to appear, then click the **Macro** icon on the content editor toolbar.

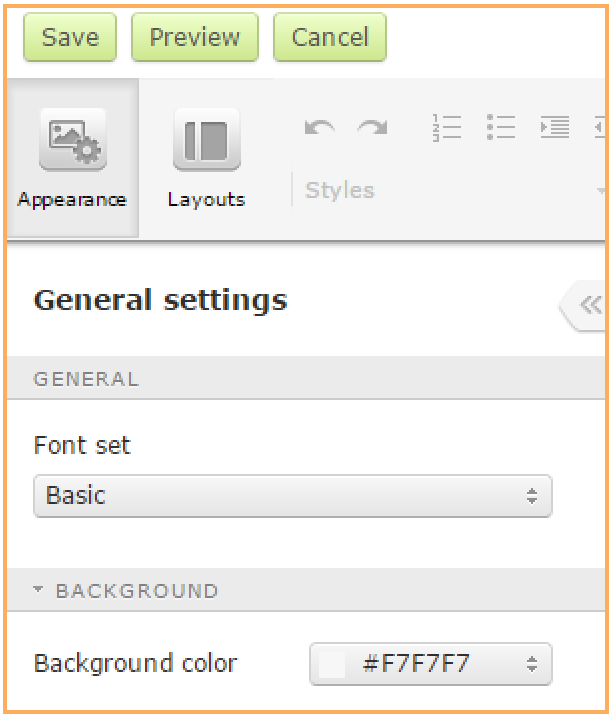


From the list that appears, select the macro you want to use. For a complete list, see Available macros.

You should add a link to the {Unsubscribe_Url} macro so recipients can easily unsubscribe from your mailing list. If a link to the {Unsubscribe_Url} macro does not appear in your email, one will be automatically appended to the message.

Setting the message background

When you first begin editing your email or email template, general settings appear in the settings panel on the left.

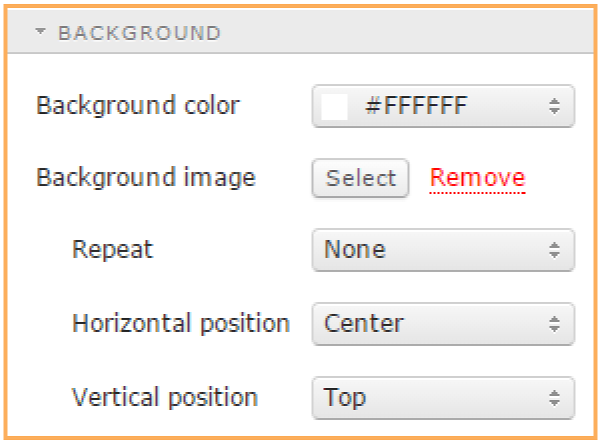


To display the general settings again, just click on the background area outside the content areas of your message.

From the general settings, you can change the settings that apply to the entire message, including the overall background of the message. For the background, you can choose a background color or image.

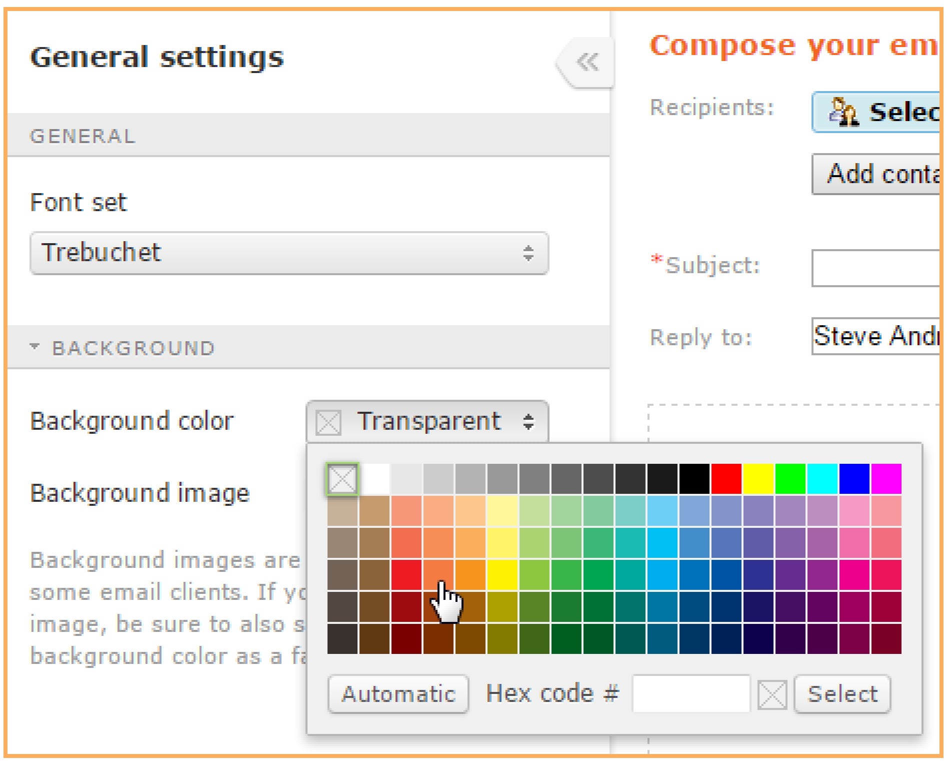
To set a background image for the message, click the **Select** button beside **Background image**. You can now select an image to be used as the background. You can choose a picture to be inserted from the pictures already in your account, or upload one or more new pictures then choose one of them to be inserted. For best results on different devices, choose an image that is no bigger than 600 pixels wide.

After you have selected a background image, you can choose how the image is repeated – horizontally, vertically, both (tiled), or not at all – and set the horizontal and vertical alignment.



Background images are not supported by some email clients (e.g. Outlook 2007, 2010, 2013). If you set a background image, be sure to also set an appropriate background color as a fallback.

To choose a background color for the message, click the **Background color** control. You can then select a color from the drop-down palette or enter the hexadecimal code for the color (e.g. *#FF0000* for red).



Choose the **X** option in the upper left corner if you don't want a background color.

To display the **General settings** panel again, click the **Appearance** icon at the top.

Changing the font set

From the **General settings** panel, you can change the default typeface used in the message by choosing a font from the **Font set** list.

After selecting a default typeface, you can still change the font for selected text using the font and text style options appearing on the content editor toolbar. Selecting a different typeface from the font set list will not override any custom text formatting. To clear custom text formatting and revert to the default typeface you selected using the **Font set** list, select the text then click the **Clear formatting** icon within the content editor.

Setting cell properties

Wild Apricot templates divide the message body into rows and columns. You can click individual cells to insert content and adjust cell settings.

For each cell, you can set the following properties:

Setting	Description
Background color	The background color of the cell. After clicking the **Background color** control, you can select a color from the drop-down palette or enter the hexadecimal code for the color (e.g. *#FF0000* for red).
Background image	An image to be displayed as the background for the message. To set a background image for the message, click the **Select** button beside **Background image**. You can now select an image to be used as the background. You can choose a picture to be inserted from the pictures already in your account, or upload one or more new pictures then choose one of them to be inserted. After you have selected a background image, you can choose how the image is repeated – horizontally, vertically, both (tiled), or not at all – and set the horizontal and vertical alignment. ⚠ Background images are not supported by some email clients (e.g. Outlook 2007, 2010, 2013). If you set a background image, be sure to also set an appropriate background color as a fallback.
Padding	The distance (in pixels) between the cell content and the cell border.
Margins	The amount of space – in pixels – that appears outside the cell. You can set the top, bottom, left, and right margins separately.
Border	The width of the cell border (in pixels). You can set the top, bottom, left, and right border separately, and choose a border style and border color in each case.

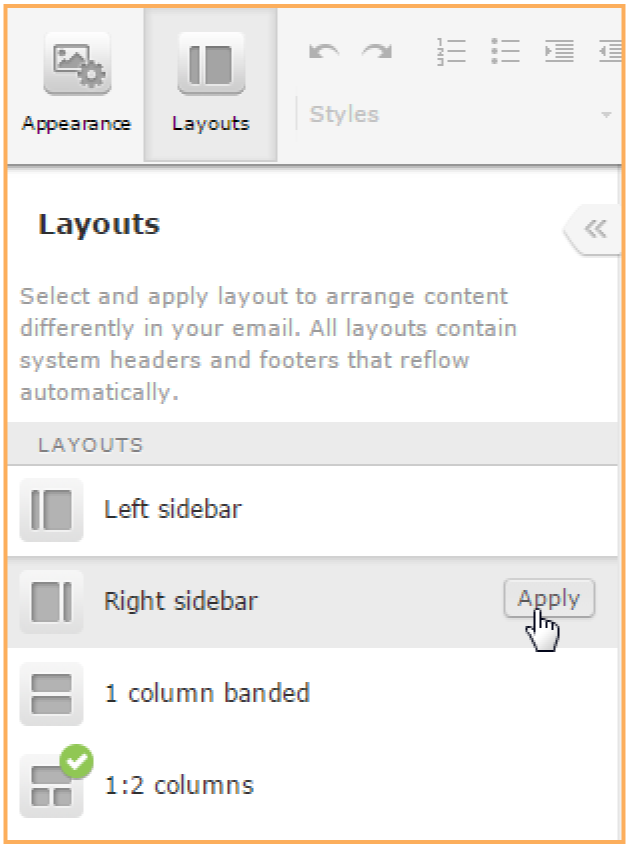
Changing the layout

You cannot add or remove individual columns and rows while modifying an email or email template, but you can switch to a different layout with a different combination of columns and rows. When you switch layouts, your content with be automatically repositioned without any loss of content or formatting.

> ⚠ If you want to send a message that consists solely of a picture or image, you have to switch to the **1 cell, no headers/footers** l ayout.

To change the layout for your email or email template, follow these steps:

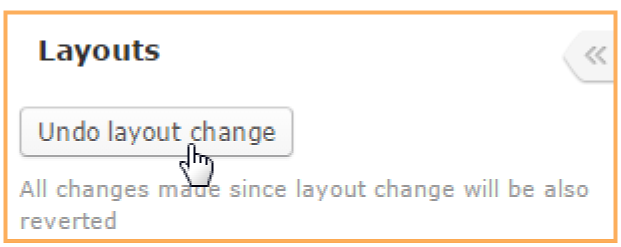
1. Click the **Layouts** icon towards the top of the screen.
2. Click the layout you want to switch to. Most layouts include preheader, header, and footer areas. The exceptions are the **1 cell, no headers/footers** option – a single-cell layout with no headers or footers – and the **No layout** option – a single block without any layout or text styles.
3. Click the **Apply** button.



If the new layout has fewer cells that the previous one, the content in the final cell will be appended to the last cell in the new layout.

> If you choose the **No layout** option, all email content is combined into a single content block with no text styles.

After switching to a different layout, you can undo the layout change by clicking the **Undo layout change** button within the layout panel.



Any changes that you have made since the layout change will also be reversed.

> If you don't want a particular layout cell to appear in your email, leave the cell empty, then click the **HTML** icon on the content editor toolbar and delete all the HTML code.

Copying and pasting external content

You can copy and paste content from external documents or web pages with minimal loss of formatting and no subsequent editing errors. To paste copied content, click where you want the text to appear then click the **Paste** icon within the content editor.

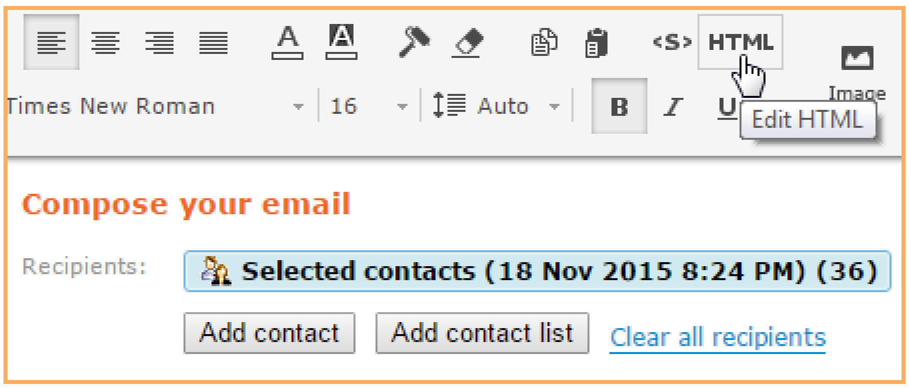
On browsers other than Internet Explorer, you may be prompted to use keyboard shortcuts instead of the Paste icon to paste your text.

The email editor will try to preserve as much of the text formatting as possible, but will discard any incompatible formatting – formatting that it cannot reproduce itself.

Whether graphical images are pasted along with the text depends on the source from which you copied the content. When pasting from sources that store images using URLs – such as Google Docs, web pages, and emails – any images included in the content will get pasted. When pasting from other sources – such as Microsoft Word – images will be discarded.

Accessing the HTML code

You cannot access the HTML code for the entire message, but you can access the HTML for individual cells by clicking the **HTML** icon within the content editor toolbar.



Exception: If you're using the **Blank** template, clicking the **HTML** icon will display the HTML code for the entire message since it consists of a single cell without any layout.

Step 3 - Previewing the email

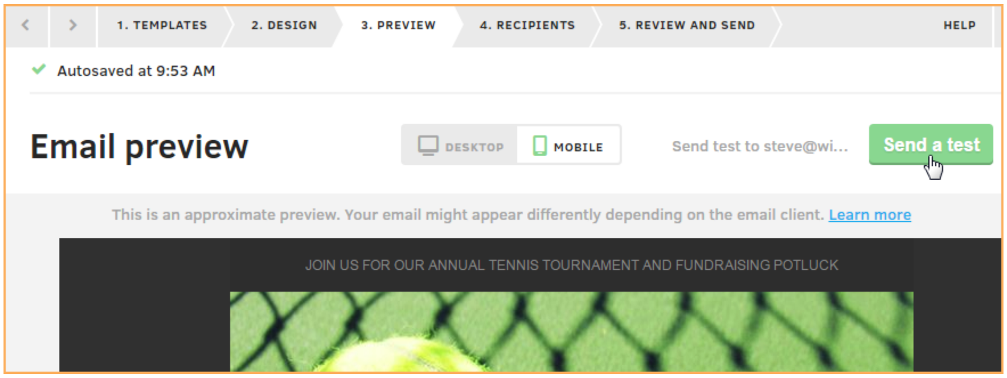
Once you are finished designing your message, you can preview your email blast. You can preview it as it would appear on mobile and desktop platforms with different screen widths.

Read more/less

A preview of the email appears while you are editing it, but for a more realistic preview, click the **Preview** tab at the top of the email wizard.

Click the preview options – Desktop and Mobile – to preview the email at different screen widths.

From here, you can send a test message to yourself by clicking the **Send a test** button.



Test emails use fake data in place of macros, not the actual data from your database. So, don't be alarmed if you see some unfamiliar content in the test message.

When you are finishing previewing your email blast, you go to the **Recipients** tab to finalize the list of recipients.

Step 4 - Choosing recipients and other delivery options

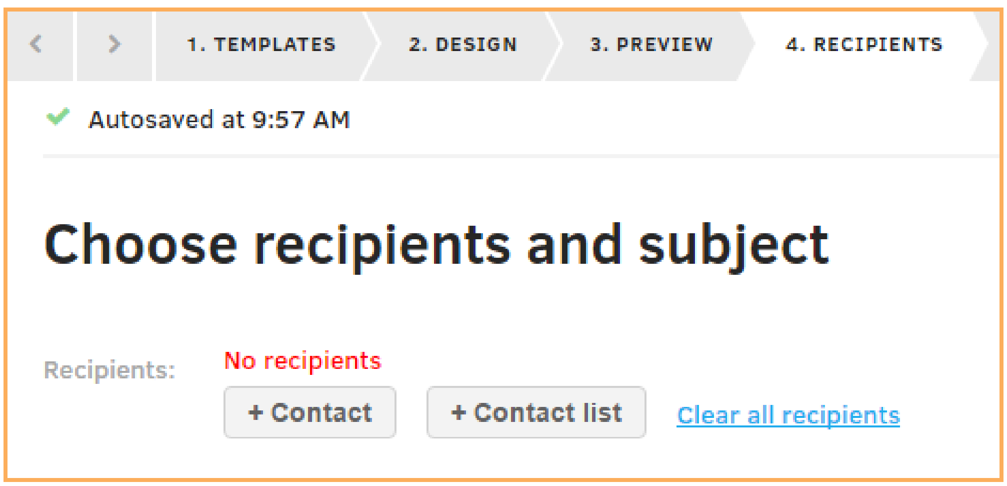
With the content of the email blast complete, you can now select your recipients or finalize the recipient list (depending on whether you started the process by selecting recipients). You can also specify the email subject, the reply-to recipient, and enable email tracking.

Read more/less

The maximum number of email recipients you can choose depends on your billing plan.

Finalizing the recipient list

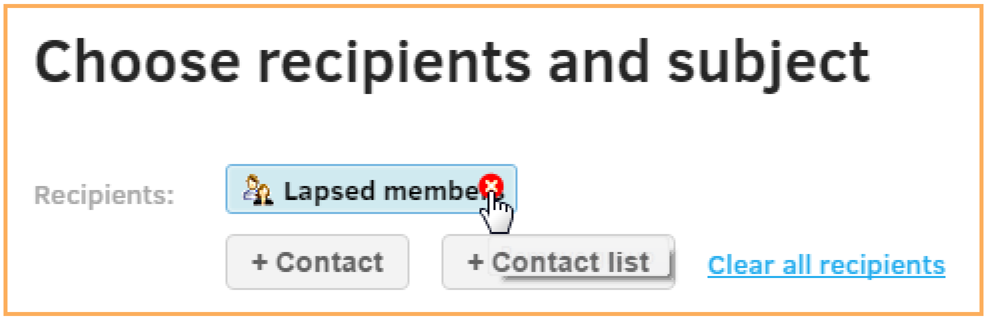
To add recipients to the list, click **+ Contact** to add individual contacts or **+ Contact list** to add lists of contacts, including results from previously saved searches.



If you add recipients using a saved search, the search will be performed when the email is sent.

For instructions on using saved searches to assemble a mailing list, see Assembling mailing lists (below).

To remove a recipient or a group of recipients, click the red X over the recipient or group.



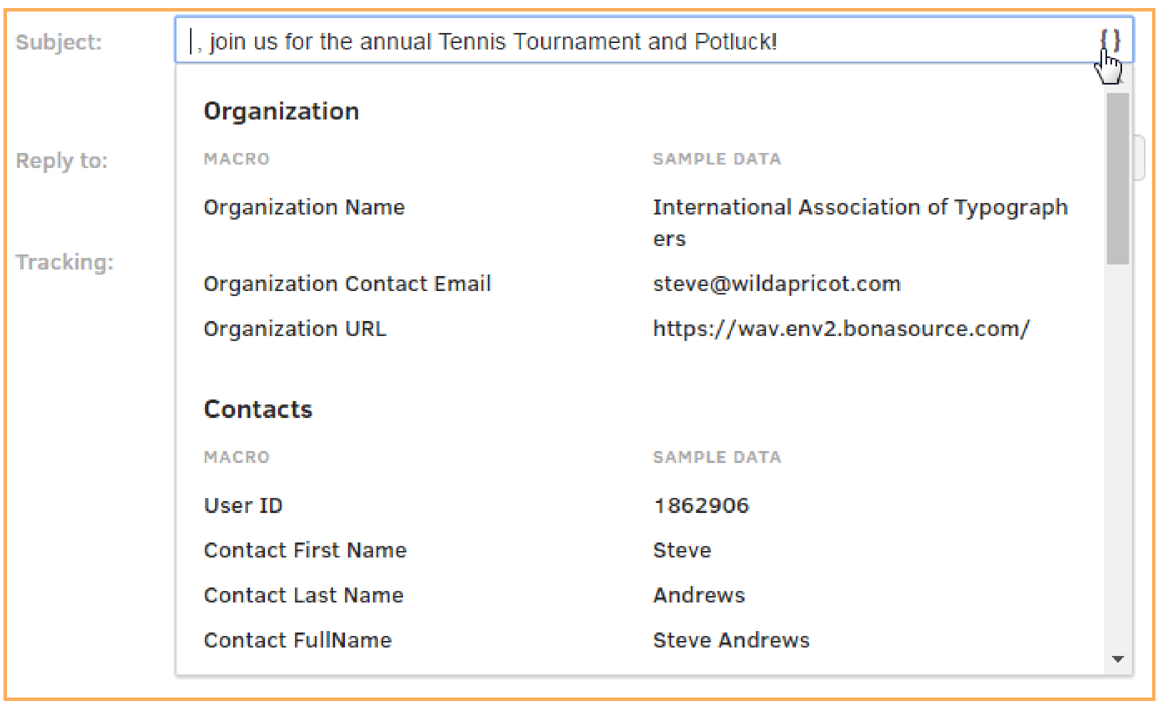
To remove all recipients, click **Clear all recipients**.

Only one email will be sent to each unique email address even if you add a recipient multiple times (directly or through groups and searches). Recipients will not see the names or email addresses of other recipients.

Specifying the email subject

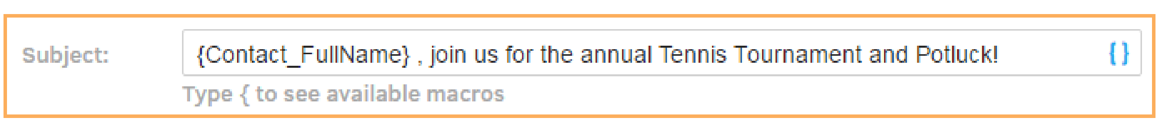
You are required to specify a subject for your email. The subject can be a mix of characters and macros, allowing you to personalize your message with information like the recipient's name. To insert a macro, follow these steps:

1. Click within the subject line where you want the macro to appear.
2. Type **{** within the **Subject** field or click the **{ }** at the end of the **Subject** field. A list of available macros appears.



Sample data is displayed beside each macro, using your own contact information.

3. Click the macro you want to insert. The macro will now appear within the subject line.



At delivery time, the macro will be replaced with the corresponding information about the contact.

Setting the Reply to address

The **Reply to** address for email blasts defaults to the address of the current administrator. You can, however, change the **Reply to** address, as well as the name of the sender, by clicking the **Change reply to** button.

You can then select a different contact from your contact database.

To specify a reply-to recipient who is not in your contact database, you can enter the name and email address directly in the fields provided.

Enabling email tracking

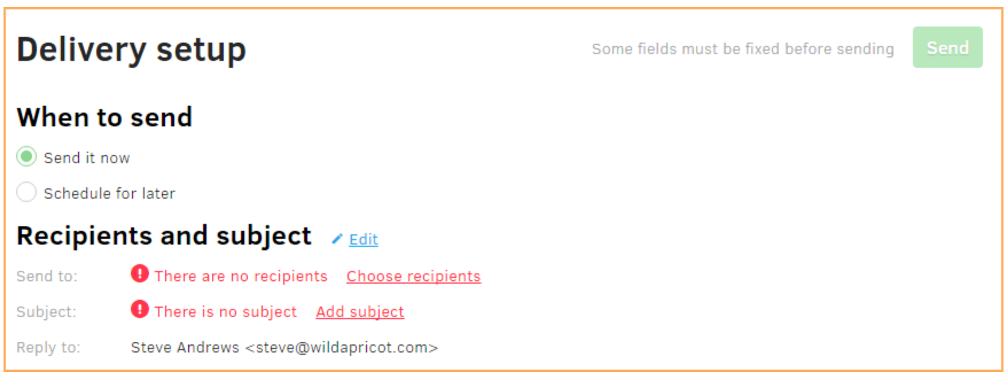
To enable email tracking, so you can see how many of your emails were opened and clicked after your email blast is sent, click the **Enable link and open email tracking** checkbox.

Step 5 - Reviewing and sending your email blast

After you've finalized the list of recipients, you can review and send your email blast. If you want, you can schedule the message to be automatically delivered at a particular date and time.

Read more/less

If there any issues with your email that would prevent it from being sent – e.g. no recipients or subject – the issues will be highlighted in red.



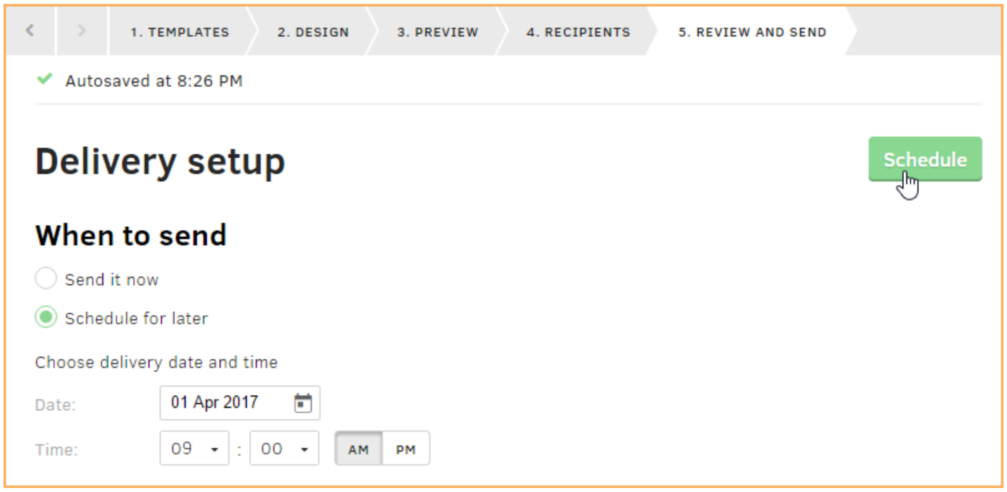
Until these issues are corrected, the **Send** button will be disabled. To correct an issue, click the link beside the error message.

If there are no issues that would prevent your email from being sent, you can review your message and click the **Send** button when you are ready to send your email blast.

> ⚠ Once you send your email blast, it is added to the email queue, and may take anywhere from a few minutes to a few hours to be actually delivered.

To schedule your email, click the **Schedule for later** option. With this option enabled, fields appear where you specify the date and time you want the email blast to be sent. You have to specify both the date and the time. The time you set here corresponds to your organization’s timezone.

Once you specify the date and time, the **Schedule** button becomes enabled.



Clicking the **Schedule** button will schedule the message for delivery and return you to the Emails list where the scheduled email will appear. For more information, see Scheduling email blasts.

Continuing composing a draft email

To continue composing a previously saved draft message, follow these steps:

Read more/less

1. Select the **Emails** option the **Email** menu.
2. Click the saved draft you want to continue editing.

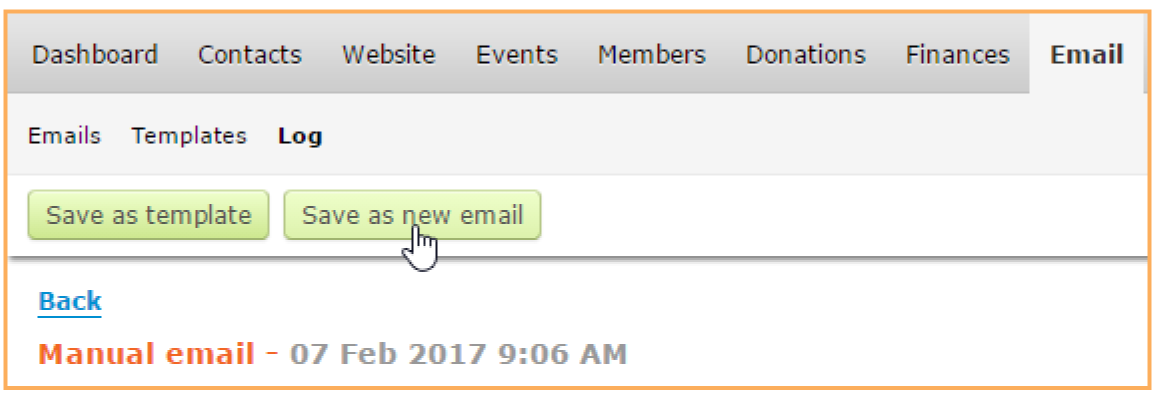
You can now continue composing your email message.

Creating a new email using a previously sent message

To use a previously sent message as the basis for your new email blast, follow these steps:

Read more/less

1. Select the **Log** option under the **Email** menu.
2. Click the previously sent message you want to use.
3. Click the **Save as new email** button at the top of the screen.



You will be taken to the email wizard's design stage. The recipients of the previously sent email will be automatically selected. You can now compose your message and refine the recipients list.

Tracking your email

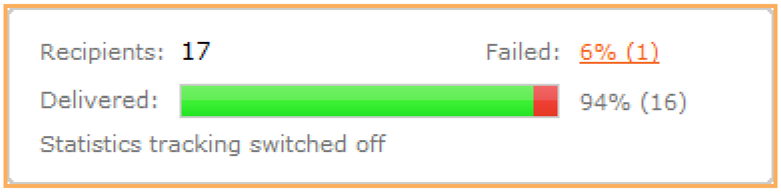
You can track your email and see delivery information and a summary of opens and clicks.

Read more/less

After you send your email blast, a summary appears listing:

- number of recipients
- number and percentage of failed messages

- number and percentage of messages delivered



If you've enabled email tracking, you'll also see:

- the number and percentage of messages opened
- the number and percentage of recipients who clicked one or more links

To view the email summary later, or for a more detailed report, click **Email** then click **Log**.

From the email log, you can view the failed and delivered email addresses, and the number of clicks for each link. For each email message received, you can see whether the email was opened and which links the recipient clicked on.

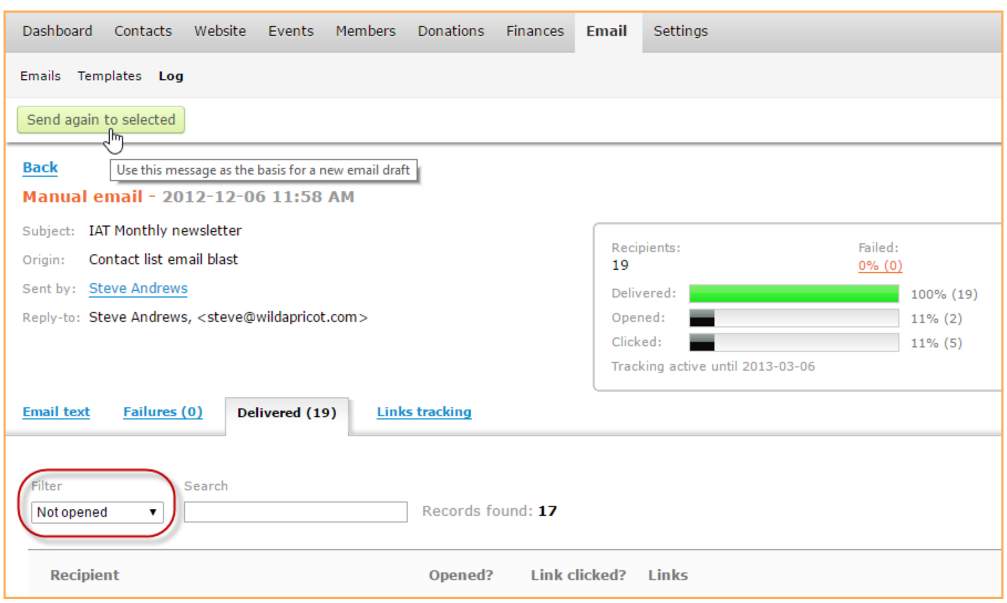
For more information, see Tracking emails.

Sending followup emails based on email tracking

If you want to send a followup email to recipients who didn't open your message or didn't click any of its links, follow these steps:

Read more/less

1. Make sure that email tracking is turned on for your email blast.
2. After sending your email, go the email log, open your message and click the **Delivered** tab.
3. From the Delivered tab, click the **Filter** drop down and select either **Not opened** or **Open but not clicked**, depending on who you want to send the followup to.
4. Click the **Send again to selected** button.



5. Modify your email as you wish then send the message.

Our method of tracking opens is not 100% accurate. Email programs that block messages from displaying images may prevent our servers from determining whether the message has been opened or not.

Assembling mailing lists

Instead of selecting your recipients each time you send an email blast, you can set up and select mailing lists. There are a couple of different ways you can set up a mailing list in Wild Apricot:

Read more/less

Using advanced search criteria

1. Perform an advanced member or contact search, using selection criteria to determine which contacts are included.
2. Save the search (Community plans and above only).
3. When you want to email the members or contacts who match the search criteria, click **Add contact list** and select the saved search. If your pricing plan does not allow you to save searches, you can simply click the **Email members** or **Email contacts** button after performing the search.

By creating a member group

1. Create a member group containing the members you want to email.
2. When you want to email the members, go to the advanced member or contact search, choose the **Group participation** criteria, and select the member group.
3. Click the **Search** button.
4. Click the **Email members** or **Email contacts** button.

Using an email subscription form

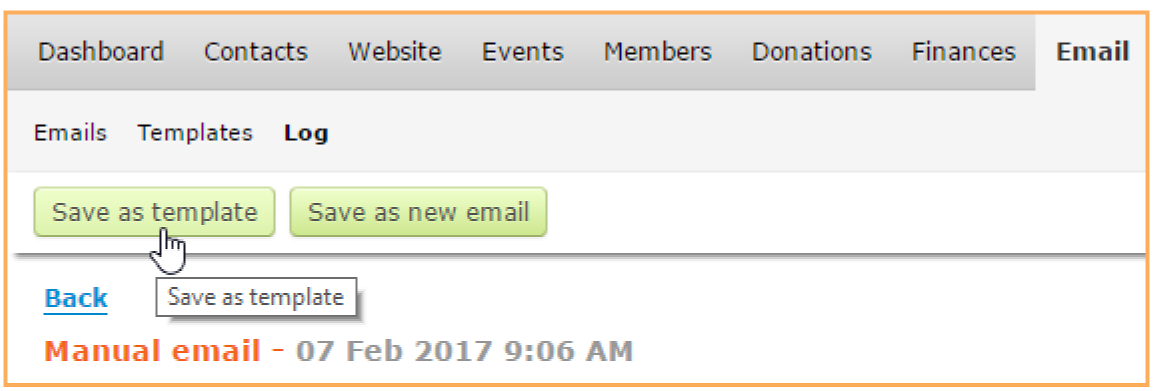
1. Add an email subscription form to your site, allowing visitors to opt in to your mailing list.
2. When you want to email those who chose to opt in, go to the advanced member or contact search.
3. Choose **Email preferences** as the search criteria.
4. Click the **Subscribed to emailings** check box.
5. Click the **Search** button.
6. Click the **Email members** or **Email contacts** button.

Linking to the web version of an email blast

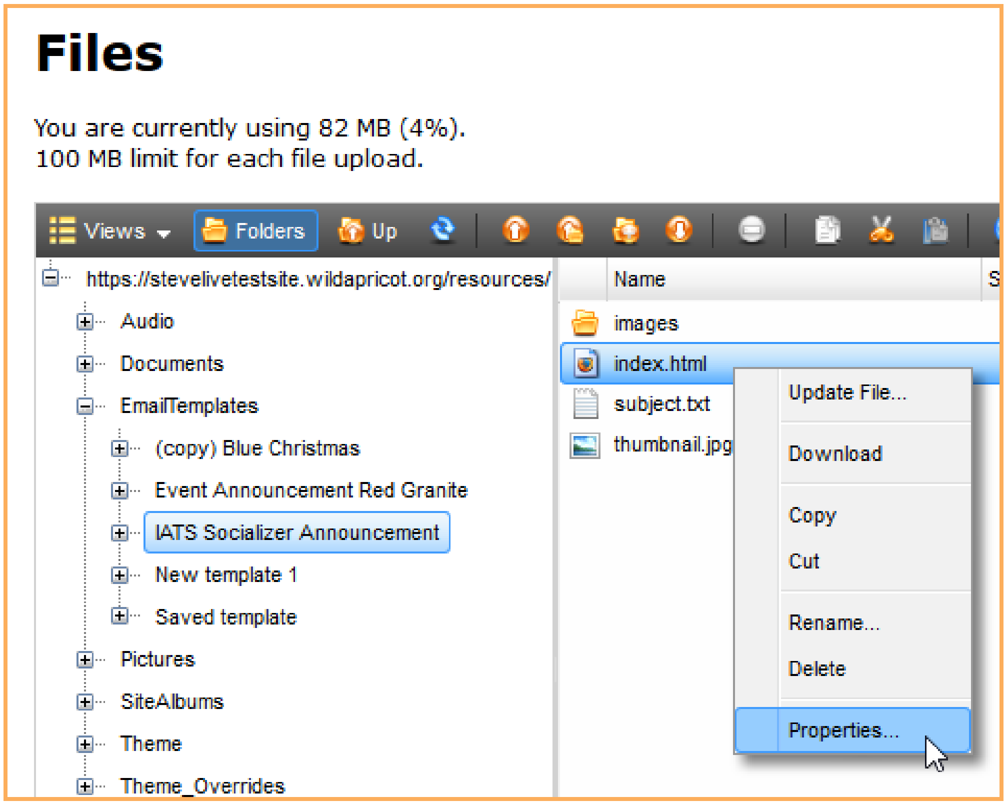
Wild Apricot does not provide an option to archive a newsletter or other email blast by creating an online version of the message. However, you can create one yourself by following these steps:

Read more/less

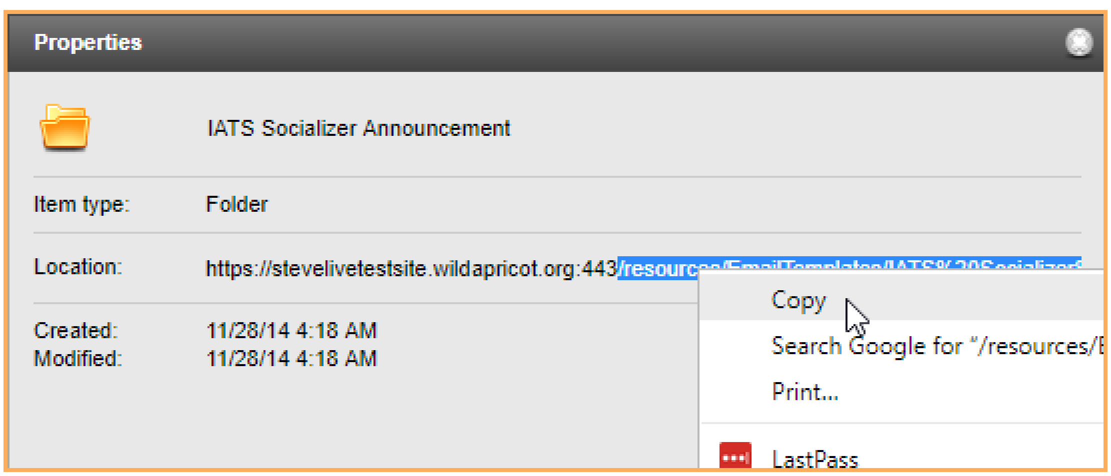
1. Create your email blast and send it only to yourself.
2. Save the email as an email template by opening the message within the email log and clicking the **Save as template** button.



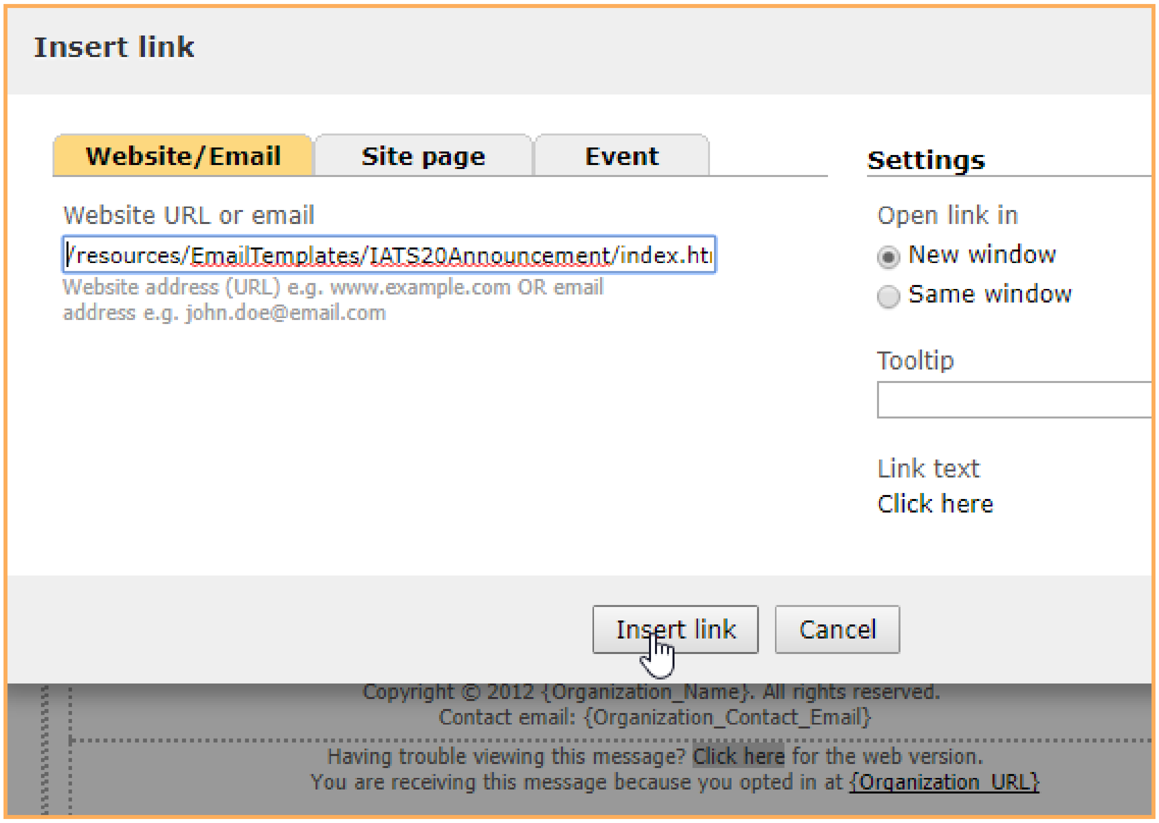
3. Under the **Website** menu, select the **Files** option.
4. From the File management screen, expand the **EmailTemplates** folder and select the subfolder with the name of the email template you just created.
5. Within the email template folder, right click over the index.html file and select the **Properties** option.



6. Copy the portion of the file location beginning with */resources* and ending with *index.html*.



7. Return to the email log and open the email blast you sent to yourself.
8. Click the **Save as new email** button.
9. Within your email message, paste the file location you copied as a link. You could, for example, have the link text read "Having trouble viewing this message?".



10. Select the recipients for your message, then review and send it.

You can also create an email blast archive page, then create a new email template for each blast, and link to each of them from the archive page.

Email blacklists

An email blacklist is a list of email servers considered to be sources of unsolicited emails (aka spam). If an email server ends up on a blacklist, the delivery of its emails can be affected or even blocked.

There are, however, both reputable blacklists, and bogus blacklists set up by opportunistic organizations attempting to extort funds from legitimate organizations like Wild Apricot.

Wild Apricot regularly checks to make sure that we are not included on any reputable blacklists, and in the rare occasions when we have been erroneously added, we have taken the necessary measures to immediately rectify the situation.

Variations in email clients

- On Apple iOS devices, content will automatically reflow from multiple columns into a single column when the screen width is less than 480 pixels. On all other mobile devices, multiple columns are maintained but the columns will be narrowed.
- Background images are not displayed when messages are viewed on Outlook 2007, 2010, and 2013 (though Outlook provides an option to view the message in a web browser).

Troubleshooting and workarounds

How do I email event registrants using a previously sent email?

Normally, when you want to use a previously sent email as the basis for a new email blast, you start by opening the previously sent email within your email log and clicking the **Save as new email** button. However, if you want to email registrants for an event, you should click the **Save as template** button instead and save the email as a custom email template. Now, go to the event registrants list and click the **E mail registrants** button then select the custom template you just created as the basis for your email blast.

On this page:

- Getting started
- Saving and exiting

Expand all sections

See also:

- Scheduling email blasts
- Email settings
- Setting the Reply to address
- Email log
- Using macros in emails
- Working with email drafts
- Complying with anti-spam regulations
- View email subscriptions for a contact

Scheduling email blasts

Scheduling email blasts

You can schedule email blasts to be sent on a particular day at a particular time.

SHOW ME (2:03)

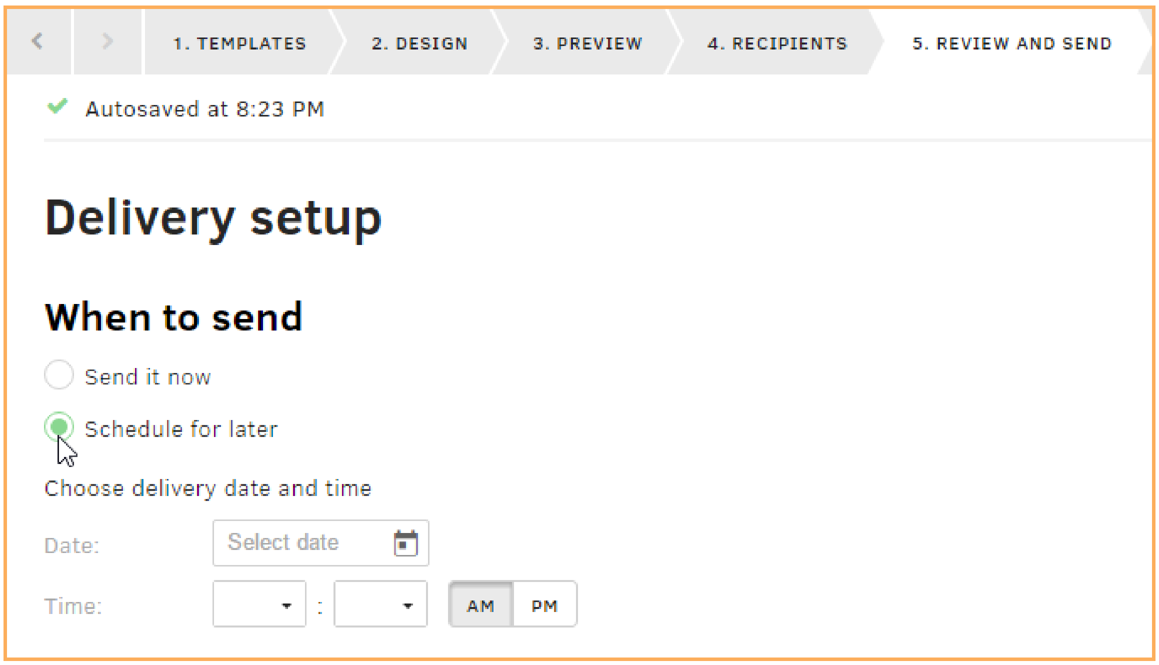
⚠ The ability to schedule email blasts is not available for free plans. For more information, see Functionality by billing plan.

Scheduling an email

You can schedule an email blast on the final step of the email wizard. From the **Delivery setup** screen – which you access by clicking **Review and send (step #5)** – you click the **Schedule for later** option.

Read more/less

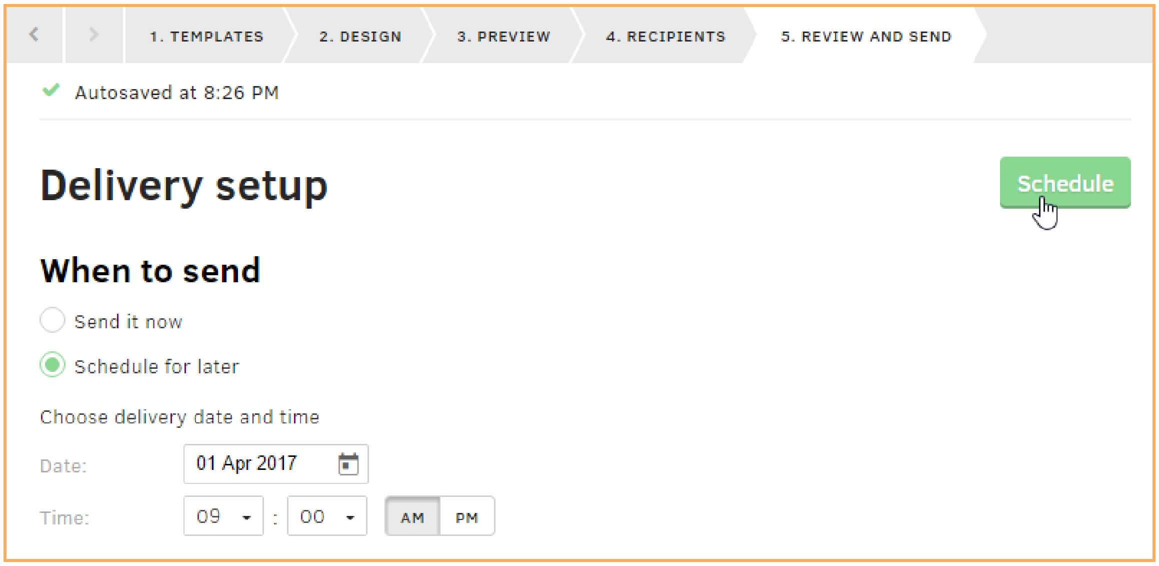
When you click this option, the **Send** button is replaced by a **Schedule** button, and fields appear where you specify the date and time you want the email blast to be sent.



You have to specify both the date and the time. For the time, you select the hour and choose from 15 minute increments. The time you set here corresponds to your organization's timezone.

> The time you choose is when the email will be queued for delivery. The message may take anywhere from a few minutes to a few hours to be actually delivered.

Once you specify the date and time, the **Schedule** button becomes enabled.

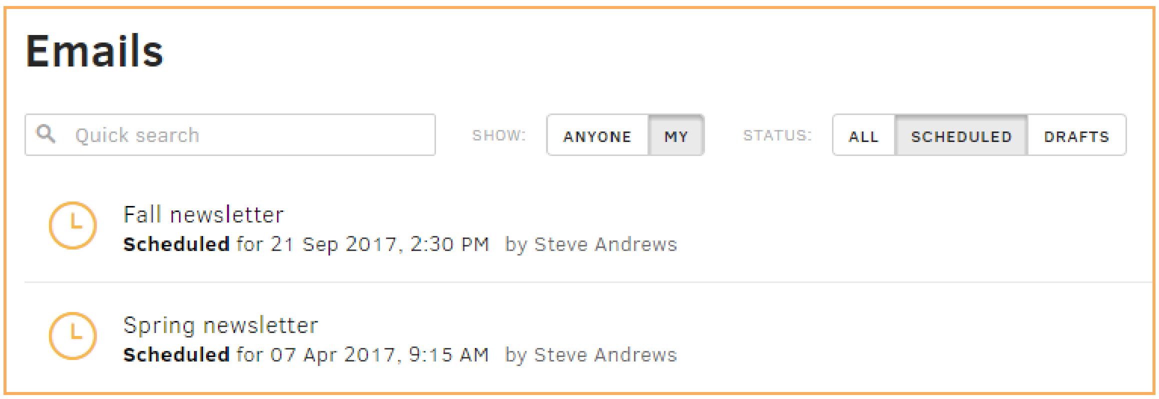


When you click the **Schedule** button, you are returned to the Emails list where the scheduled email will appear.

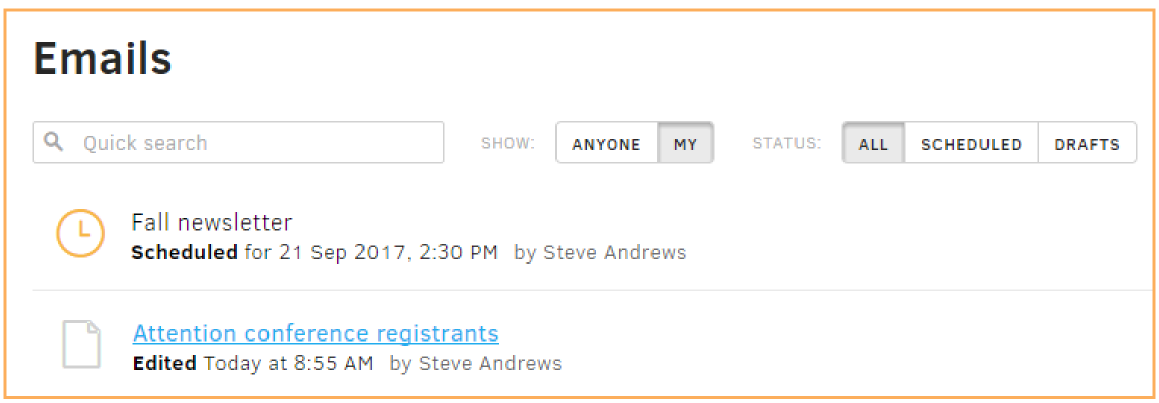
Viewing scheduled emails

To view just your scheduled emails, set the **Status** filter on the Emails list to **Scheduled**. Now, scheduled emails will be displayed in order of delivery date and time, from the soonest to the furthest into the future.

Read more/less



When the **Status** filter on the Emails list is set to **All**, then all unsent emails – including scheduled emails – will be displayed in the order in which they were modified, beginning with the most recently modified message.

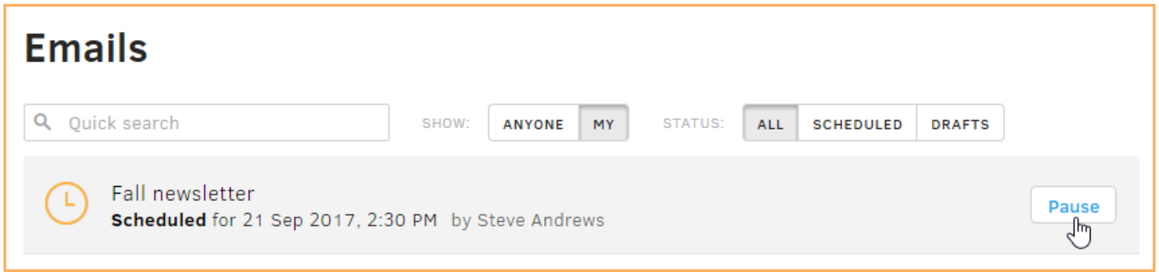


Scheduled emails will remain in the Emails list until they are sent. Once a scheduled email is sent, it will appear in the email log, along with all other sent emails. No confirmation message is sent to administrators when the scheduled email goes out.

Pausing a scheduled email

To pause a scheduled email, so that it isn't automatically delivered at the scheduled date and time, hover over the email within the Emails list and click the **Pause** button.

Read more/less



Pausing a scheduled email will convert it back to an editable draft and prevent it from being sent.

To resume the delivery schedule for the paused email, open the email for editing, return to the Delivery setup screen – by clicking **Revie w and send (step #5)** – and click the **Schedule** button.

Modifying a scheduled email

After scheduling an email, you can modify it or reschedule it. Before you can modify or reschedule a scheduled email, you have to pause it by hovering over the email within the Emails list and clicking the **Pause** button.

Read more/less

Now, you can click the email subject to open the email wizard and modify your message. Once you are finished modifying your message, you need to jump to the Delivery setup screen – by clicking **Review and send (step #5)** – and click the **Schedule** button to un-pause the email.

Before clicking the **Schedule** button, you can reschedule the email by changing the scheduled date and time. To unschedule the email, so that it doesn't go out automatically at a particular date and time, click the **Send it now** option. With this option selected, you can still save your draft and send the message manually at a later date.

Deleting a scheduled email

To delete a scheduled email, and completely remove it from the Emails list, follow these steps:

Read more/less

1. Hover over the email within the Emails list.
2. Click the **Pause** button to pause the scheduled email.
3. Click the **Delete** button to delete the email.
4. When prompted, click the **Delete** button to confirm.

On this page:

Expand all sections

See also:

- Sending email blasts

Using macros in emails

Using macros in emails

Using macros, you can personalize automatic emails or email blasts to include specific information about the recipient, such as first name or organization name. A macro is a special code that gets replaced with information specific to each recipient. For example, the {Contact_First_Name} macro will be replaced with each recipient's first name.

You cannot edit or otherwise modify macros. You can only insert or remove them.

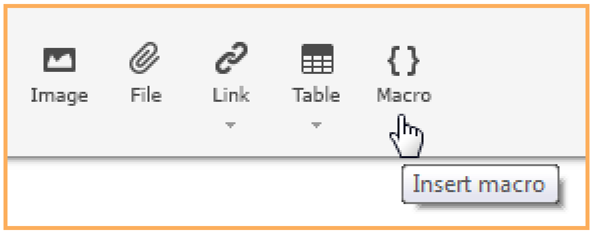
Inserting a macro

Macros can be inserted in email blasts or email templates. Inserting macros in email templates ensures that all recipients receive a standard yet customized message.

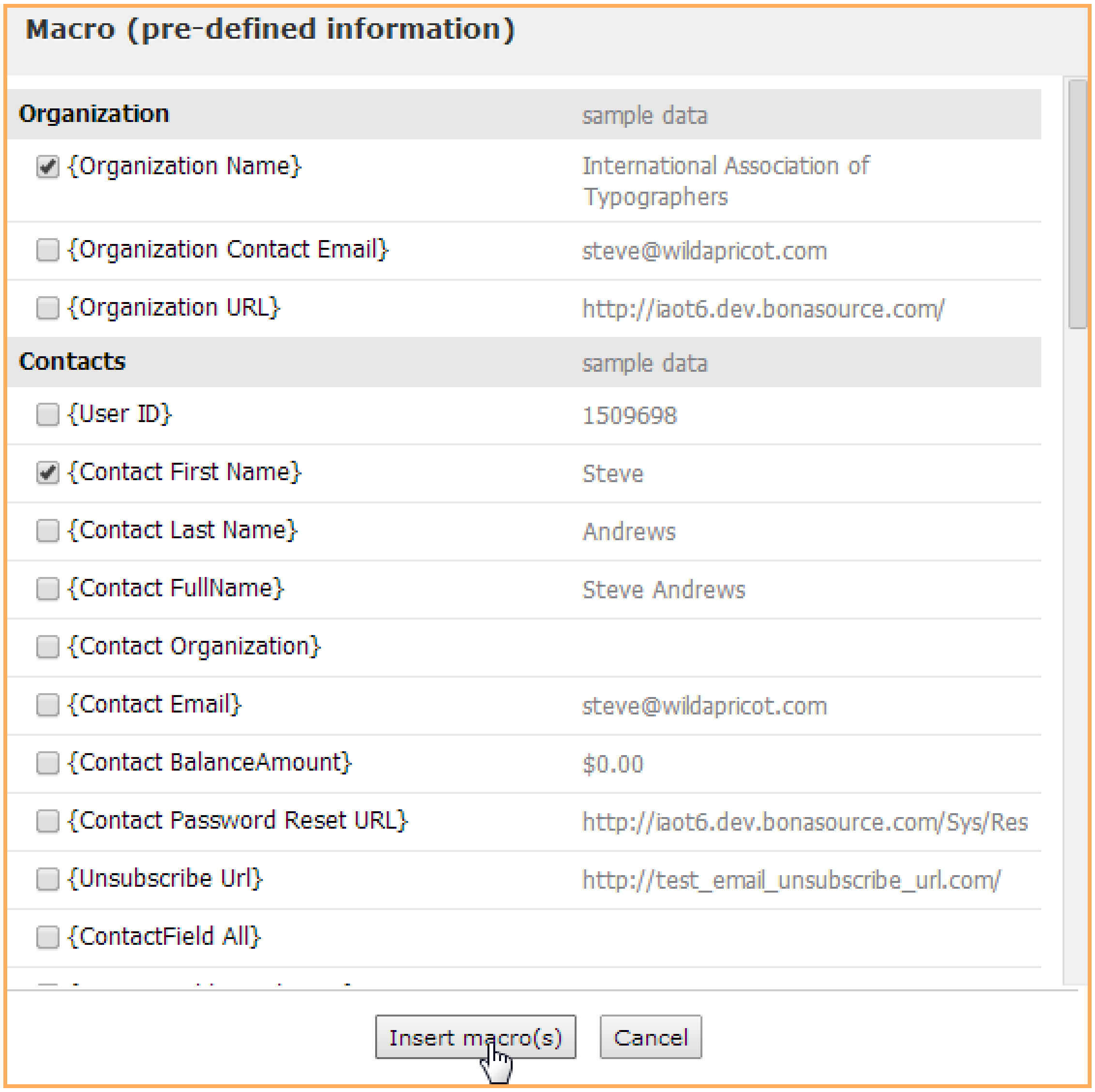
To insert a macro in an email or email template, follow these steps:

Read more/less

1. Beginning composing the email blast or editing the email template.
2. Click within the email or email template where you want the macro to appear.
3. Click the **Macro** icon on the content editor toolbar.



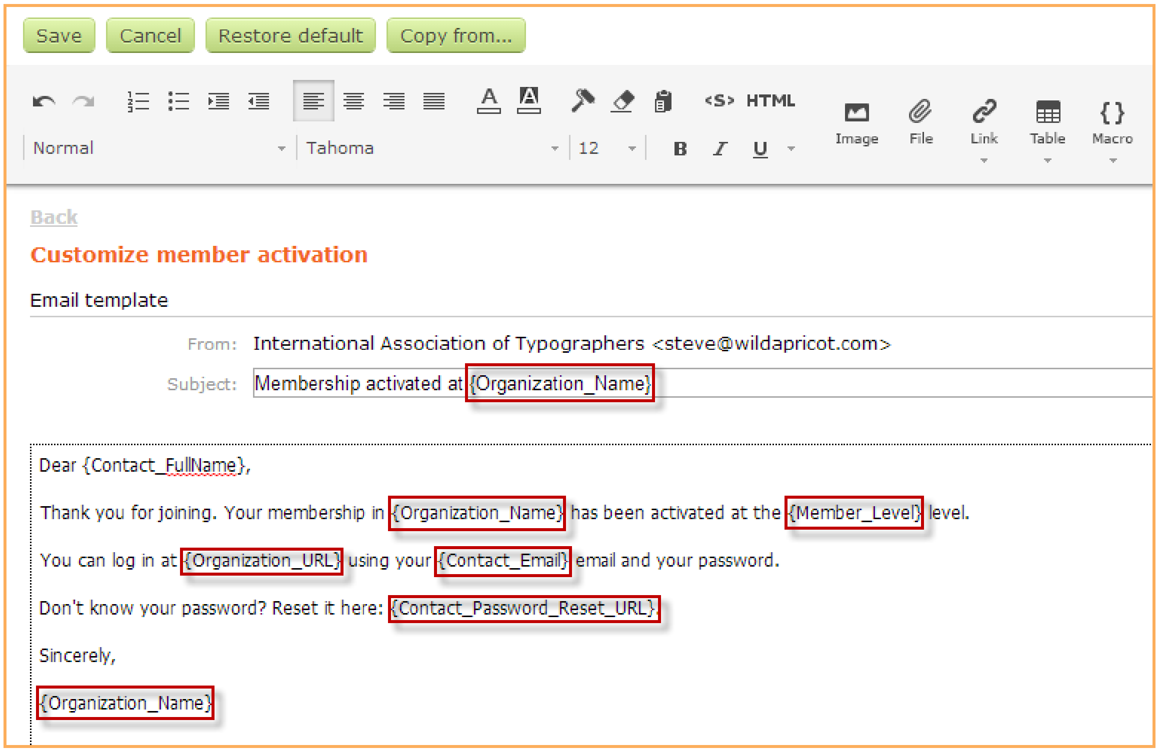
4. From the list that appears, select the macro(s) you want to use. Only the macros specific to this type of email (e.g. invoice email) will be available.



The sample data that is displayed beside each macro is drawn from the first contact in your mailing list (in the case of email blasts) or from your own contact record (in the case of email templates).

5. Click the **Insert macro** button.

Each email or email template can contain any number of macros, both within the subject line and the body of the message.



For a complete description of the available macros, see System macros and Custom field macros (below).

⚠ You should add a link to the {Unsubscribe_Url} macro so recipients can easily unsubscribe from your mailing list. If a link to the {Unsubscribe_Url} macro does not appear in your email, one will be automatically appended to the message.

Behavior of macros in preview and in test emails

When you preview a manual email blast, any macros within the message will be replaced by sample data that is drawn from the contact record for the first recipient in your mailing list. When you send a test email, the sample data is drawn from your own contact record, not the first contact in the recipient list.

When you customize automatic emails, such as membership notifications, event emails, invoices, and receipts, the contact-specific data for the test email will be drawn from your own contact record. Macros that are not contact-specific will be replaced in test emails with random or fake data. For example, invoice/receipt test emails will use random or fake data for the invoice number, item description, and amount.

Macros by email type

Different kinds of macros are available to be inserted depending on the kind of email or email template you are modifying. For example, event macros are only available when modifying event emails, and cannot be inserted into manual email blasts. If you manually enter a macro that is not supported for the type of email or email template you are modifying, it will be ignored.

The table below lists the kinds of macros that are available for each email type:

Read more/less

	Organization macros	Contact macros	Member macros	Event info macros	Event registration macros	Invoice macros	Receipt macros	Donation macros
Manual emails/email blasts	✔	✔	✔					

Membership emails/receipts	✔	✔	✔					
Event announcements	✔	✔	✔	✔				
Event reminders/confirmations	✔	✔	✔	✔	✔			
Invoices	✔	✔	✔		✔	✔		
Payment receipts	✔	✔	✔				✔	
Donation emails/receipts	✔	✔	✔					✔

System macros

The following macros are provided by Wild Apricot. You can also insert custom field macros (see below) that display data from custom fields you have added to your database.

⚠ These macros are case-sensitive.

Organization macros

Read more/less

Macro	Description	Example
Organization_Name	Your organization name	Company Inc.
Organization_Contact_Email	Contact email for your organization	Admin@MyCompany.com
Organization_URL	URL of your organization	http://MyCompany.domain.com
Payment_Instructions	Payment instructions for membership applications and manual invoices	Please pay online
Organization_Payment_Instructions	Payment instructions for membership renewals	Please pay online

Contact macros

Read more/less

Macro	Description	Example
User_ID	Unique identifier assigned to contact	404760
Contact_First_Name	First name from contact record	John
Contact_Last_Name	Last name from contact record	Smith
Contact_FullName	First and last name from contact record	Smith
Contact_Organization	Organization from contact record	Company Inc.

Contact_Email	Email from contact record	JohnSmith@company.com
Contact_BalanceAmount	Current balance for contact	$120
Contact_Password_Reset_URL	Link to reset password page	http://assocUrl/Sys/ForgottenPasswordRequest
Unsubscribe_Url	Link to unsubscribe page	http://assocUrl/Common/Unsubscribe.aspx?email=vins%2540bonasource.com&type=2&person=1

Member macros

Read more/less

Macro	Description	Example
Member_Level_Fee	Level fee	$100.00 (USD)
Member_Level	Name of membership level	Gold member
Member_Subsequent_Renewal_Date	Member's next renewal due after the upcoming renewal	20 Sep 2015
Member_Profile_URL	Link to member profile page	http://assocUrl/Sys/Profile
Member_Public_Profile_Url	Link to public member profile	http://assocUrl/Sys/PublicProfile/7029110
Member_Upcoming_Renewal_Date	Member's next renewal date (using the account date format)	20 Aug 2015
Member_Since	Member since date	20 Apr 2015
Member_Status	Status of member	Active
MemberField_Group_participation	Member groups that member belongs to	group1, group2
Member_Level_Full	Combines the following macros: Member_Level (Member_Level_Fee)	Gold member ($100.00 (USD))

Event information macros

Read more/less

Macro	Description	Example
Event_Title	The event name.	Annual General Meeting
Event_Date	The event's start date.	16 Nov 2015
Event_EndDate	The event's end date.	17 Nov 2015
Event_TimeZone	The selected time zone.	EST
Event_Time	The start time of the event.	3:30 PM
Event_EndTime	The end time of the event.	7:30 PM
Event_UpcomingSessionDate	The start date of the next upcoming session.	16 Nov 2015
Event_UpcomingSessionTime	The start time of the next upcoming session.	3:30 PM
Event_UpcomingSessionEndDate	The end date of the next upcoming session.	17 Nov 2015

Event_UpcomingSessionEndTime	The end time of the next upcoming session.	7:30 PM
Event_SessionsList	A list of all sessions (including past ones)	#1 Sunday, February 12, 2017, 4:00 AM (EST) – 10:30 PM (EST) #2 Monday, February 13, 2017, 4:00 AM (EST) – 10:30 PM (EST) #3 Tuesday, February 14, 2017, 4:00 AM (EST) – 10:30 PM (EST)
Event_Location	The location of the event.	Las Vegas
Event_Details	Description field within event details.	Text
Event_Extra_Info	Additional event information to be inserted in registration confirmation email field within event details.	Text
Days_till_Event	The number of days until the event begins.	3
Event_Url	The Internet address of the event details page for this event.	https://stevelivetestsite.wildapricot.org/event-37394
Event_Payment_Instructions	The payment instructions entered on the **Registration types & settings** tab. This macro can only be used for event registration pending emails.	Please pay online
Registration_buttons	Inserts **Register** and **Not attending** buttons, allowing the invitees to register for the event or indicate that they do not plan on attending. This macro is only available for event announcements. For more information, see Providing a Not attending option.	

Event registration macros

Read more/less

Macro	Description	Example
Registration_First_Name	First name from event registration	John
Registration_Last_Name	Last name from event registration	Smith
Registration_Email	Email name from event registration	JohnSmith@company.com
Registration_Price	Registration type price + extra costs + Registration_Guest_Total_Price	$2000.00
Registration_Guest_Count	Number of guests	5
Registration_Guest_Names	Displays the first and last names of all registered guests.	Mary Smith, Jenny Smith
Registration_Guest_Total_Price	Guest registration price + extra costs	$200.00
Registration_Type	Name of registration type	Full day

Donation macros

Read more/less

Macro	Description	Example
Donation_Number	Number of donation	00007
Donation_Date	Date	20 Jun 2015
Donation_Amount	Amount	$25.00
Donation_Tender	Tender	Cash
Donation_Comments	Comments from donor	Text
Donation_PublicMemo	Comments for payer field	Public memo text

Invoice macros

Read more/less

Macro	Description	Example
Invoice_Number	Invoice number	00003
Invoice_Date	The date of the invoice.	20 Jun 2015
Charge_Amount	The total amount of the invoice.	$150.00
Amount_Owing	The amount owing on the invoice.	$100.00
Amount_Paid	The amount paid towards the invoice.	$50.00
Invoice_Status	The current status of the invoice.	Unpaid
Invoice_Origin	The type of transaction.	Membership application: Gold
Invoice_PublicMemo	Comments for payer field	Public memo text
Invoice_Details_URL	Link to invoice details in public profile which allows user to view and pay the invoice online (does not require logging in)	
Invoice_Details	Displays the invoice items	Item Amount Membership application $20.00 Discount -$2.00

Payment receipt macros

Read more/less

Macro	Description	Example
Payment_Date	The date of the payment.	20 Jun 2015
Payment_Amount	The amount of the payment	$12.23
Payment_SettledAmount	The portion of the payment that has been settled.	$10.00
Payment_Tender	The method by which the payment was received.	PayPal Standard
Payment_AvailableBalance	The unsettled portion of the payment.	$2.23
Payment_PublicMemo	Comments for payer field	Public memo text

Payment_SettlementsTable	Combines the following macros: Payment_Date, Invoice_Number, Invoice_Origin	Date: 20 Jun 2015 Document: Invoice 00006 Settled amount $10.00 Membership application: Gold

Custom field macros

You can use macros to display information stored in the custom fields you have added to your Wild Apricot database.

Custom field macros use the following format:

```
{fieldtypeField_fieldname}
```

where *fieldname* is the name of the field, spaces are converted to underscores, and *fieldtype* is one of the following:

Field type	Example
Contact	{ContactField_Phone}
Member	{MemberField_JobTitle}
Event	{EventField_Preferred_Seating}
Donation	{DonationField_Fund}

The information displayed by each custom macro depends on the custom field type.

In addition to the individual custom field macros, a macro that combines information from all the custom fields of a particular field type is also available. This macro uses the following format:

```
{fieldtypeField_All}
```

For example:

```
{ContactField_All}
```

On this page:

Expand all sections

Working with email drafts

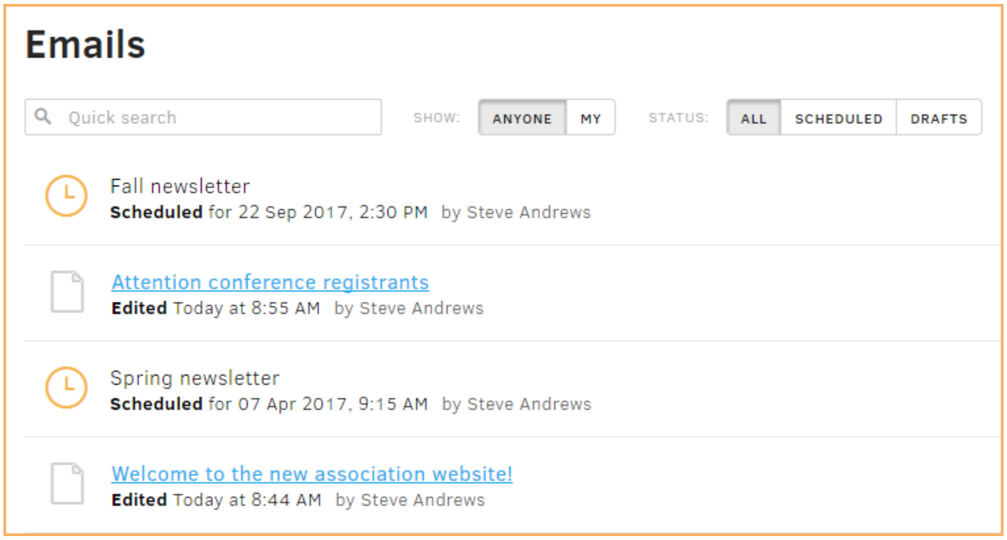
Working with email drafts

Wild Apricot lets you save an email you are working on so you can finish it or send it at a later time. You can send it manually or schedule it for delivery at a particular date and time. For instructions on how to create an email, see Sending email blasts.

Viewing and filtering email drafts

To view a list of your email drafts, hover over the **Email** menu and click **Emails**, or just click the **Email** menu. The Emails list that appears will display all your unsent emails, including both scheduled emails and unscheduled email drafts.

Read more/less



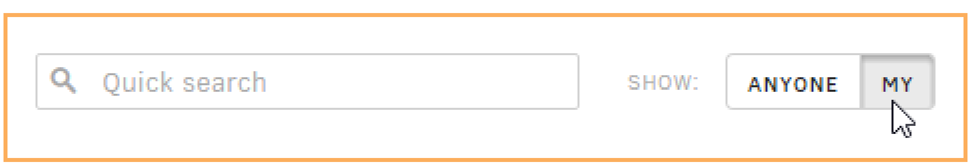
To view your sent emails, go to the email log.

For each draft, the subject of the email is displayed, along with the date of the last change, and the name of the person who last updated the draft.

You can filter the Emails list in several ways:

- To show only those emails whose subject or details matches a particular search string, enter that string in the **Quick search** field .

- To show only those emails that you have created or edited, set the **Show** filter to **My**. To show all emails, set the **Show** filter to **A nyone**.



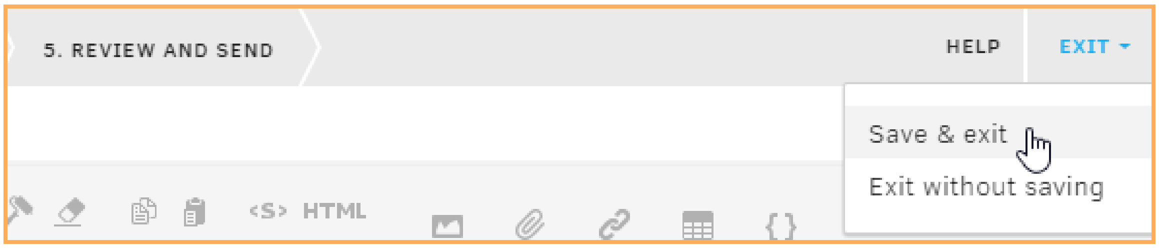
- To show just scheduled emails, set the **Status** filter to **Scheduled**. To show just unscheduled email drafts, set the **Status** filter to **Drafts**. To show all emails regardless of status, set the **Status** filter to **All**.

These filter options work in combination. For example, if you set the **Show** filter to **My**, set the **Status** filter to **Scheduled**, and enter a search string in the **Quick search** field, then only scheduled emails that you have created or modified that match the search string will be displayed.

Saving email drafts

To save the email you are editing as a draft, click the **EXIT** menu in the upper right corner of the email wizard, and click the **Save and exit** opt ion.

Read more/less

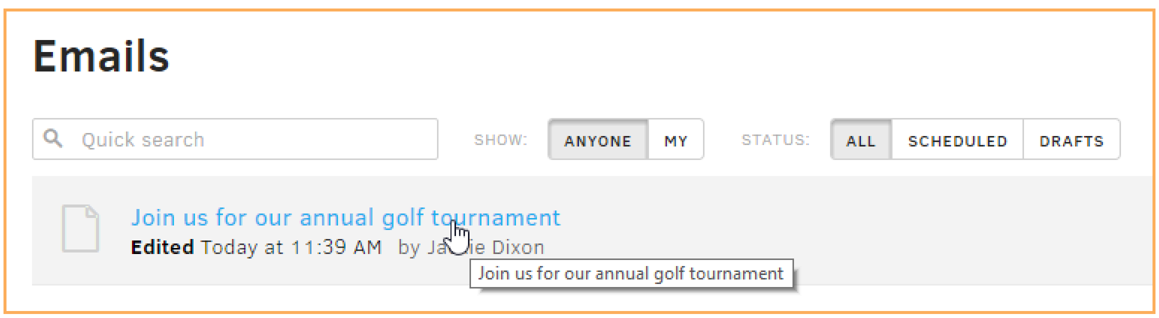


A draft of your email will be automatically saved every 30 seconds.

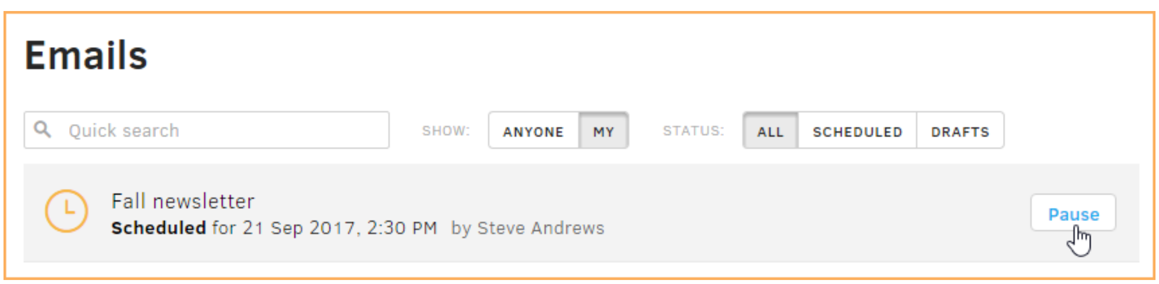
Modifying saved email drafts

To resume editing an unscheduled email draft, click on its subject within the Emails list.

Read more/less



To modify a scheduled email, you have to pause it by hovering over the email within the Emails list and clicking the **Pause** button.



Now, you can click the email subject to open the email wizard and modify your message.

Deleting an email draft

To delete an unscheduled email draft, hover over the draft within the list and click the **Delete** button at the end of the row.

Read more/less

To delete a scheduled email, hover over the email, click the **Pause** button, then click the **Delete** button.

Deleting the draft will remove it permanently.

Sending email drafts

To send an email draft, follow these steps:

Read more/less

1. Within the Emails list, click the subject of the email draft you want to send.
2. Make any required changes to the email.
3. Make any required adjustments to the recipient list. The default recipient list will consist of the contacts you originally selected when you saved the draft.
4. Click **Review & send (step #5)**.
5. If there are no issues that need fixing, click the **Send** button. If there are issues, click the link beside each error message to address the issue.

Once you send an email draft, the draft is deleted.

For more information, see Sending email blasts.

On this page:

Expand all sections

See also:

- Sending email blasts
- Scheduling email blasts
- Contact email settings and log

Using email templates

Using email templates

Wild Apricot provides a variety of professionally designed templates for your email blasts and automatic emails. You can use these templates as is, duplicate and modify them, or create your own templates from scratch.

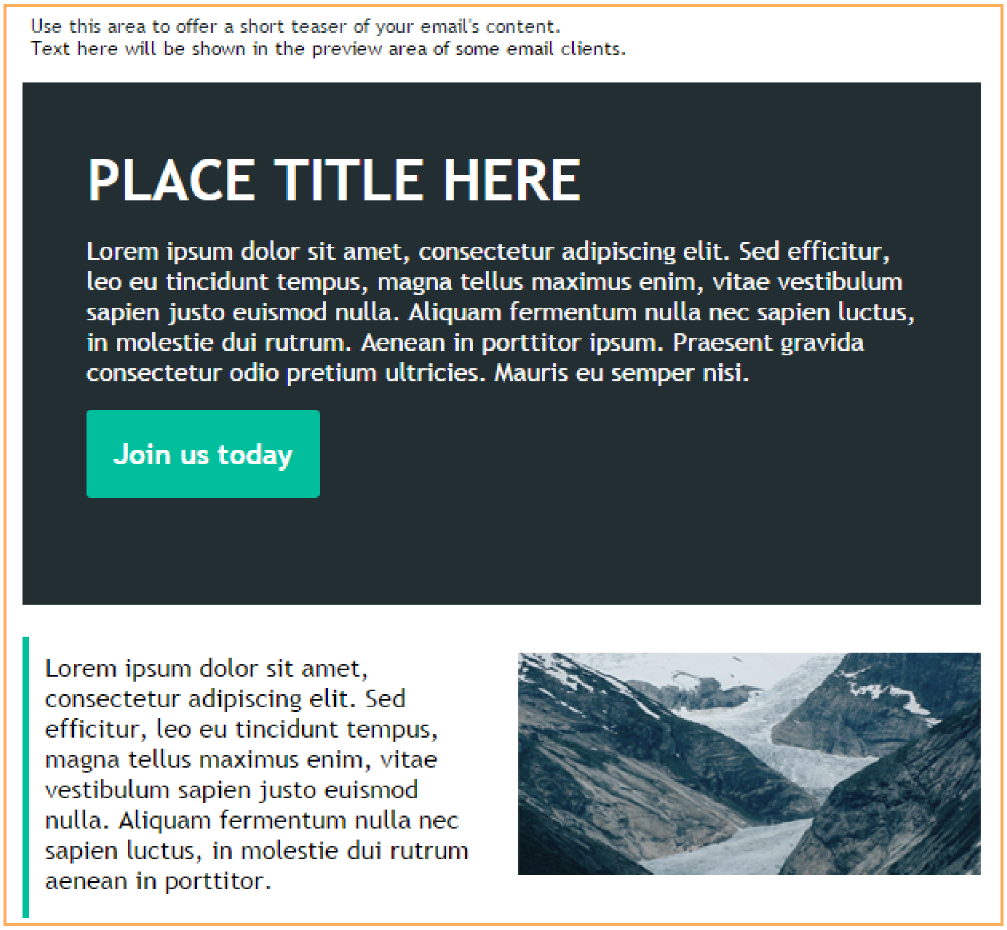
Emails created using Wild Apricot's new generation of email templates are responsive – meaning that they will automatically adjust to fit smaller screens – and will appear the same on different email clients, subject to some variations.

What is an email template?

An email template is a sample email that can serve as the basis for your own custom emails.

Read more/less

After selecting a template for your email, you replace the boilerplate text with your message, and replace or remove graphics. You can also add macros to insert member or event information.



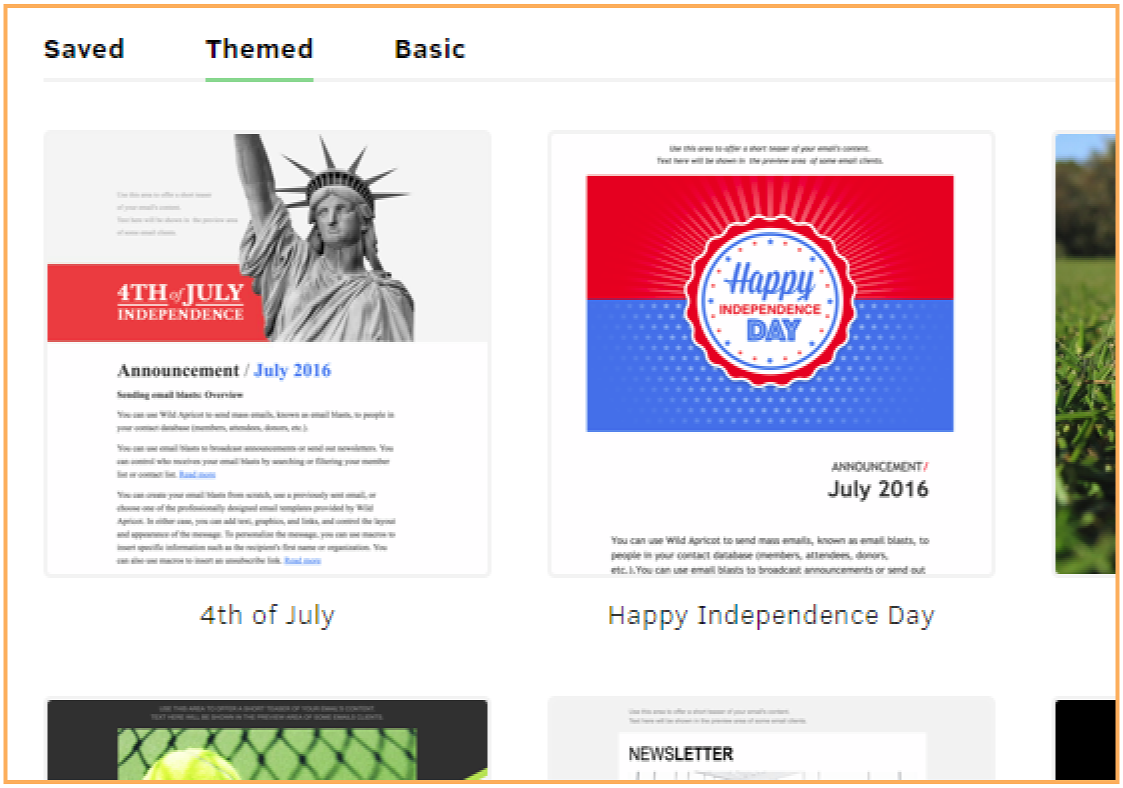
Template types

There are two kinds of email templates in Wild Apricot: system templates and custom templates.

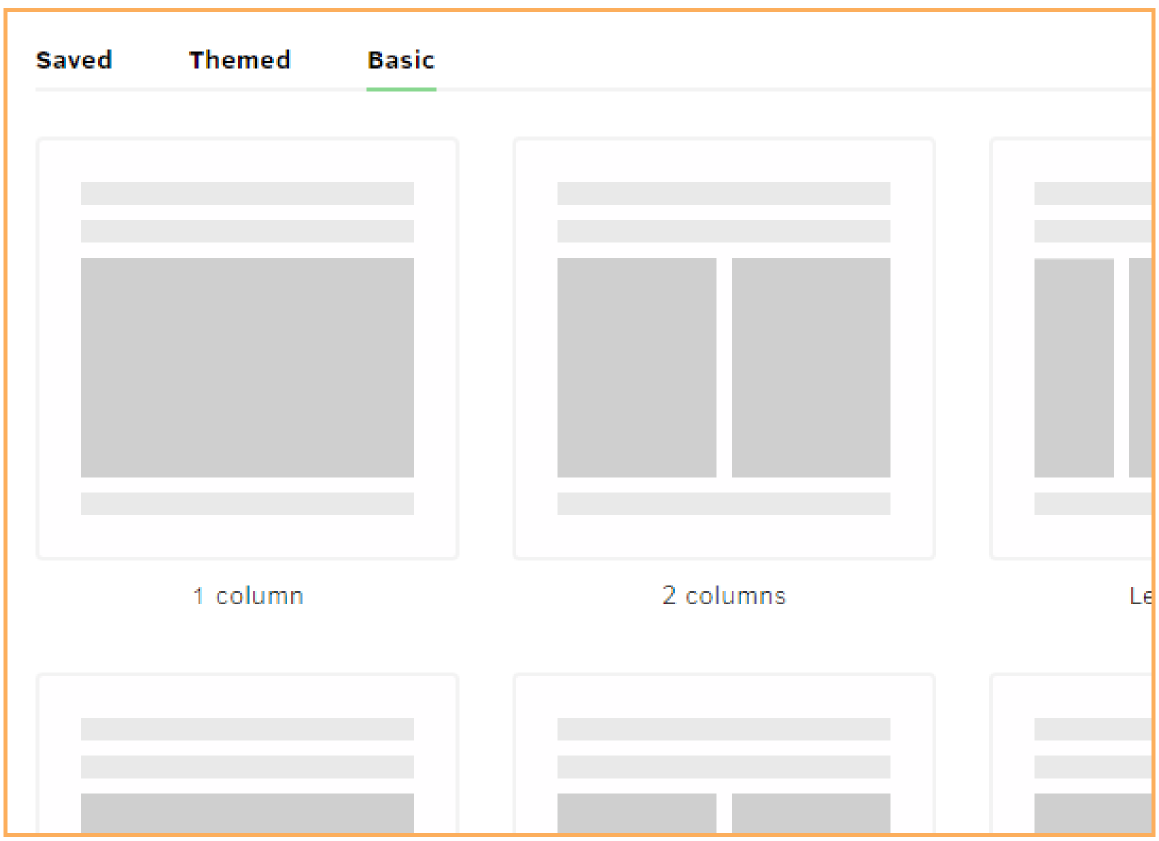
Read more/less

System templates are templates provided by Wild Apricot. You cannot modify or delete a system template, but you can duplicate one to create your own *custom template*. Custom templates are templates you have created or copied.

System templates are grouped into **Themed** and **Basic** templates. The **Themed** templates are professionally designed templates in a variety of colors and styles, with sample content and graphics.



The **Basic** templates are simple templates in a variety of layouts, with boilerplate text and no graphics.



Among the basic templates are a **Simple** template, which consists of a single cell layout with no headers or footers – suitable for clients who want to send a plain message quickly – and a **No layout** template, which consists of a single content block and no layout or text formatting – suitable for clients who wish to design their own email templates from the ground up.

Getting started

There are a number of ways you can initiate an email blast using a template.

Read more/less

To start without selecting a template or any recipients, follow these steps:

1. Click **Emails** under the **Email** menu.
2. Click the **Compose email** button.

To start by choosing the template you want to use, follow these steps:

1. Click **Templates** under the **Email** menu.
2. Click on the template you want to use. Templates are grouped by type. Custom templates that you have created or copied yourself. The **Themed** templates are professionally designed templates in a variety of colors and styles, with sample content and graphics. The **Basic** templates are simple templates in a variety of layouts, with boilerplate text and no graphics.
3. Click the **Send email** option.

To start by choosing the contacts or members you want to email, follow these steps:

1. Click the **List** option under the **Contacts** or **Members** menu.
2. Search and filter the contact or member list to display only the contacts or members you want to email. For instructions on searching and filtering, see Contact list.
3. Click the **Email contacts** or **Email members** button.

You can also choose to email the registrants for a particular event by clicking the **Email registrants** button, or email contacts on an event waitlist by clicking the **Email waitlisted** button.

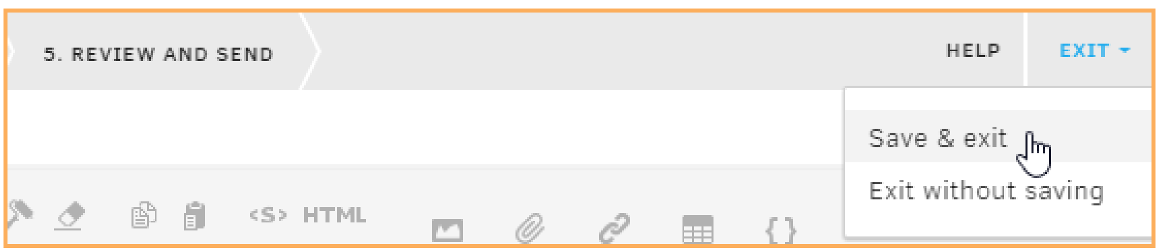
In either case, the email wizard appears to walk you through the steps involved in composing and sending your email blast. If you chose the template first, the email wizard will appear and take you to the **Design** tab, where you can begin customizing your email. If you selected the recipients first, you'll still be able to adjust the recipient list before sending the email blast.

You can move to the next step in the email wizard by clicking the **>** button, and to the previous step by clicking the **<** button. You can jump from one step to another at any time by clicking the tab name.

Saving and exiting

You can exit the email wizard at any time by clicking the **EXIT** menu in the upper right corner. You'll have the option of saving your changes and exiting, or exiting without saving.

Read more/less



Step 1: Choosing a template

Unless you began by choosing a template, the first step in the email wizard is to select the template you want to use as the basis for the email.

Read more/less

Templates are grouped onto different tabs by type. Custom templates that you have created or copied are displayed on the **Saved** tab. On the **Themed** tab are professionally designed templates in a variety of colors and styles, with sample content and graphics. On the **Ba sic** tab are simple templates in a variety of layouts, with boilerplate text and no graphics. Among the basic templates are a **Simple** templa te, which consists of a single cell layout with no headers or footers – suitable for clients who want to send a plain message quickly – and a **No layout** template, which consists of a single content block and no layout or text formatting – suitable for clients who wish to design their own email templates from the ground up.

To choose a template, just click on it. You will be automatically taken to the design step, where you can compose your message.

Step 2: Customizing the email

With the template selected, you can now design the content for your email blast. This can involve adding, or replacing text, as well as adding or replacing graphics, links, and macros. You can also modify the layout of the message and change other aspects of its appearance.

Read more/less

Wild Apricot email templates divide the message body into rows and columns. You can click individual cells to insert content and adjust cell settings.

A draft of your design will be automatically saved every 30 seconds. If you wish to exit without saving your changes, click the **EXIT** menu in the upper right corner and choose the **Exit without saving** option.

After you are finished designing your email content, click the **Preview** tab at the top of the email wizard to preview your message.

Adding and replacing text

Most templates use sample or *boilerplate* text to act as a placeholder to give you an idea of what the email could look like. You should review all text in the template and replace where necessary with text that applies to your organization and your announcement.

To add text to the email from the **Design** tab, simply click where you want the text to appear and start typing. To remove existing text, select it and press **Delete** on your keyboard to remove it or start typing to overwrite it.

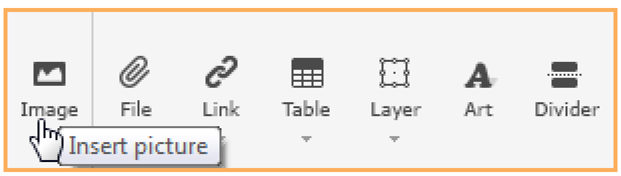
You can format your text using the various toolbar options.

> For consistent results throughout your email, you should format your text using text styles (e.g. H1, Normal, etc.) rather than individual font options (typeface, size, etc.).

To paste text copied from another source – such as Microsoft Word, Apple's Pages, or an email – click where you want the text to appear then click the **Paste** icon within the content editor. For more information, see Pasting text from other sources.

Adding and removing pictures

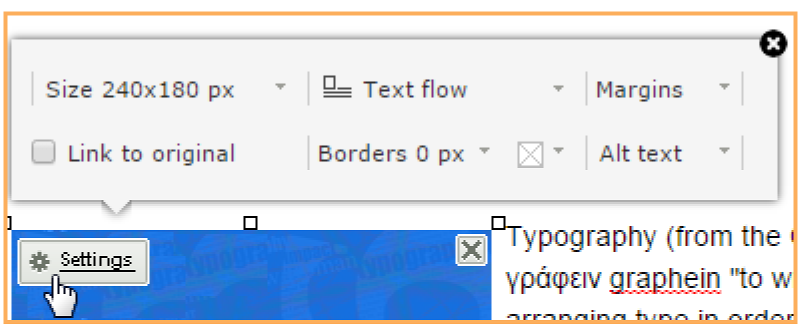
To add a picture to your template, click where you want the picture to appear then click the **Image** icon within the toolbar.



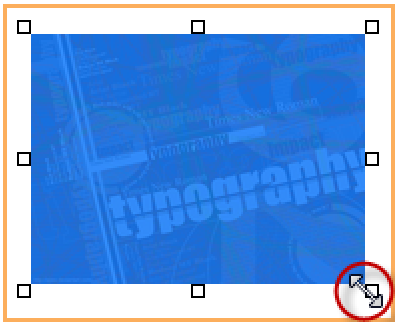
From the window that appears, you can choose a picture that is already in your account or upload new pictures from your computer or network.

> When you insert a picture, you are really inserting a link to the picture stored on your account. If you move, rename, or delete the image from your account, the image will no longer appear in your template. Instead of uploading and inserting pictures, you can edit the HTML code directly to display an image file stored on another website.

To set or change the properties of the picture, position your mouse over the picture in the template, then click the **Settings** option. From the image settings toolbar that appears, you can change any of the image image's properties, including size, alignment, margin, and borders, and how adjoining text wraps around the image.



You can also resize a picture by clicking on it then dragging on its selection handles.



To remove an existing picture, position your mouse over the picture and click the **X** icon in the top right corner of the picture.

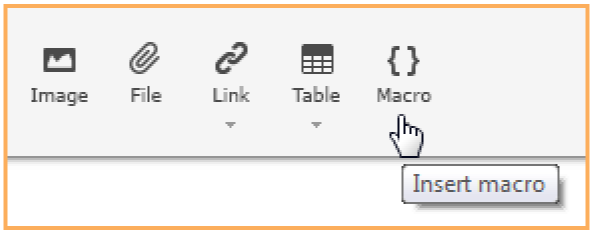
You can also delete a picture by selecting it then pressing the **Delete** key on your keyboard.

For more information, see Inserting pictures.

Using macros

Macros allow you to personalize the email to include specific information about the recipient (first name, for example). The templates you are using may already include macros such as {Organization_Name} and {Organization_Contact_Email}.

To insert a macro in your email, click within the message where you want the macro to appear, then click the **Macro** icon on the content editor toolbar.

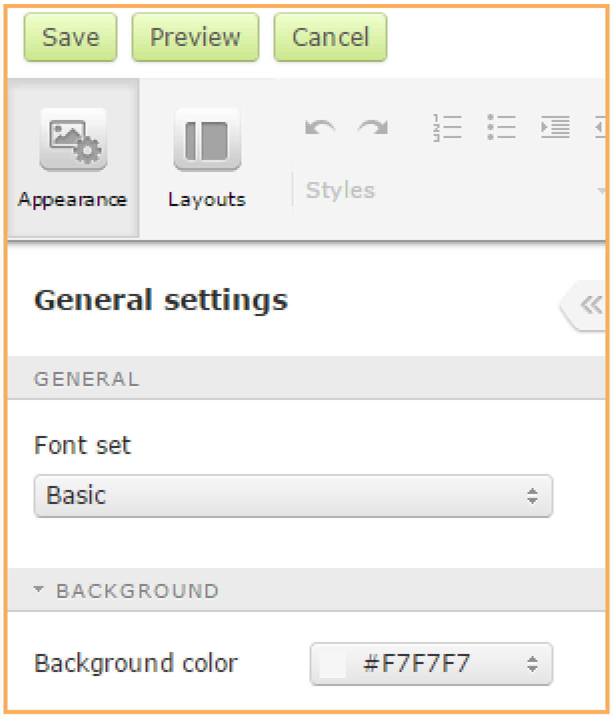


From the list that appears, select the macro you want to use. For a complete list, see Available macros.

> If a link to the {Unsubscribe_Url} macro does not appear in your email, one will be automatically appended to the message.

Setting the message background

When you first begin editing your email or email template, a **General settings** panel appears on the left.

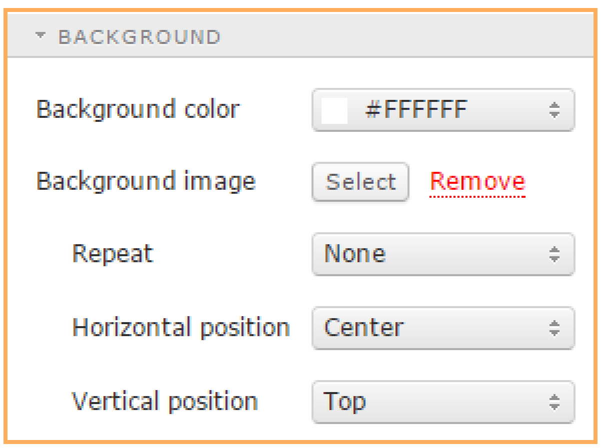


From here, you can change the settings that apply to the entire message,

including the overall background of the message. For the background, you can choose a background color or image.

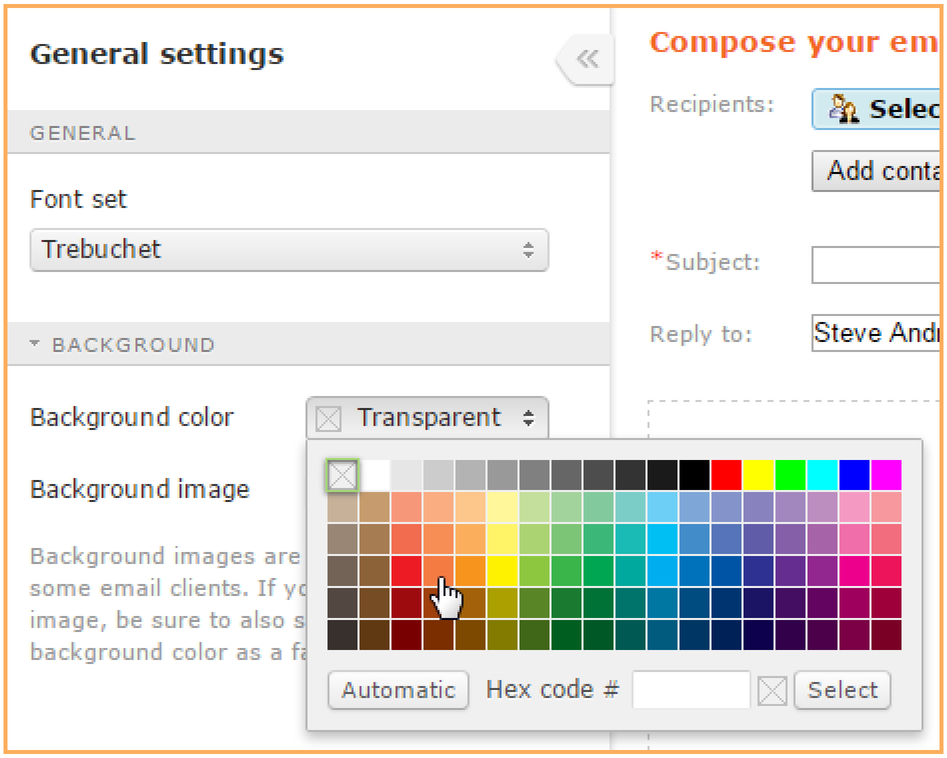
To set a background image for the message, click the **Select** button beside **Background image**. You can now select an image to be used as the background. You can choose a picture to be inserted from the pictures already in your account, or upload one or more new pictures then choose one of them to be inserted. For best results on different devices, choose an image that is no bigger than 600 pixels wide.

After you have selected a background image, you can choose how the image is repeated – horizontally, vertically, both (tiled), or not at all – and set the horizontal and vertical alignment.



Background images are not supported by some email clients (e.g. Outlook 2007, 2010, 2013). If you set a background image, be sure to also set an appropriate background color as a fallback.

To choose a background color for the message, click the **Background** color control. You can then select a color from the drop-down palette or enter the hexadecimal code for the color (e.g. *#FF0000* for red).



Choose the **X** option in the upper left corner if you don't want a background color.

> To display the **General settings** panel again, click the **Appearance** icon at the top.

Changing the font set

From the **General settings** panel, you can change the default typeface used in the message by choosing a font from the **Font set** list.

After selecting a default typeface, you can still change the font for selected text using the font and text style options appearing on the content editor toolbar. Selecting a different typeface from the font set list will not override any custom text formatting. To clear custom text formatting and revert to the default typeface you selected using the **Font set** list, select the text then click the **Clear formatting** icon within the content editor.

Setting cell properties

Wild Apricot templates divide the message body into rows and columns. You can click individual cells to insert content and adjust cell settings.

For each cell, you can set the following properties:

Setting	Description
Background color	The background color of the cell. After clicking the **Background color** control, you can select a color from the drop-down palette or enter the hexadecimal code for the color (e.g. *#FF0000* for red).

Background image	An image to be displayed as the background for the message. To set a background image for the message, click the **Select** button beside **Background image** . You can now select an image to be used as the background. You can choose a picture to be inserted from the pictures already in your account, or upload one or more new pictures then choose one of them to be inserted. After you have selected a background image, you can choose how the image is repeated – horizontally, vertically, both (tiled), or not at all – and set the horizontal and vertical alignment. Background images are not supported by some email clients (e.g. Outlook 2007, 2010, 2013). If you set a background image, be sure to also set an appropriate background color as a fallback.
Padding	The distance (in pixels) between the cell content and the cell border.
Margins	The amount of space – in pixels – that appears outside the cell. You can set the top, bottom, left, and right margins separately.
Border	The width of the cell border (in pixels). You can set the top, bottom, left, and right border separately, and choose a border style and border color in each case.

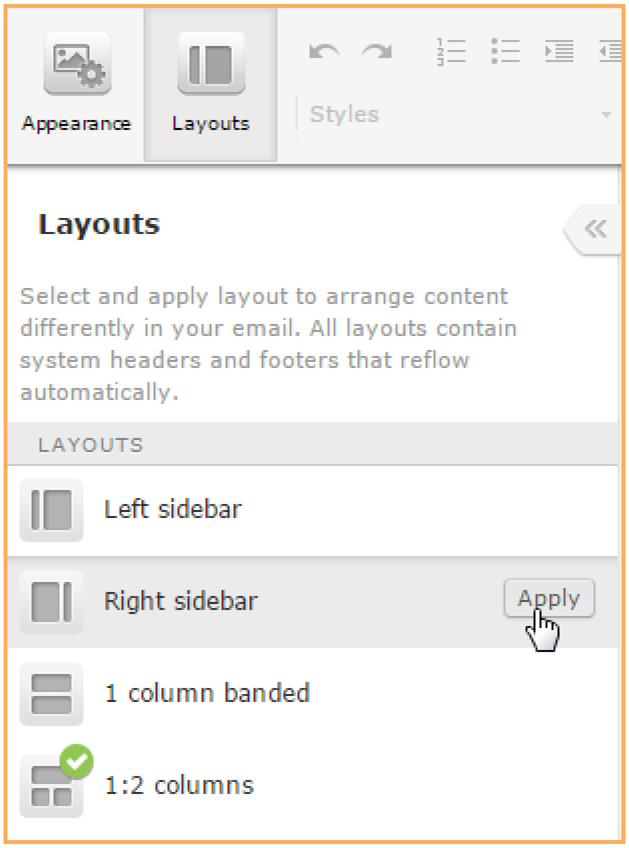
Changing the layout

You cannot add or remove individual columns and rows while modifying an email or email template, but you can switch to a different layout with a different combination of columns and rows. When you switch layouts, your content with be automatically repositioned without any loss of content or formatting.

If you want to send a message that consists solely of a picture or image, you have to switch to the **1 cell, no headers/footers** layout.

To change the layout for your email or email template, follow these steps:

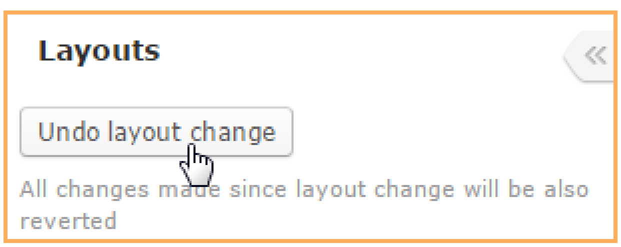
1. Click the **Layouts** icon towards the top.
2. Click the layout you want to switch to. Most layouts include preheader, header, and footer areas. The exceptions are the **1 cell, no headers/footers** option – a single-cell layout with no headers or footers – and the **No layout** option – a single block without any layout or text styles.
3. Click the **Apply** button.



If the new layout has fewer cells that the previous one, the content in the final cell will be appended to the last cell in the new layout.

> If you choose the **No layout** option, all email content is combined into a single content block with no text styles.

After switching to a different layout, you can undo the layout change by clicking the **Undo layout change** button within the layout panel.

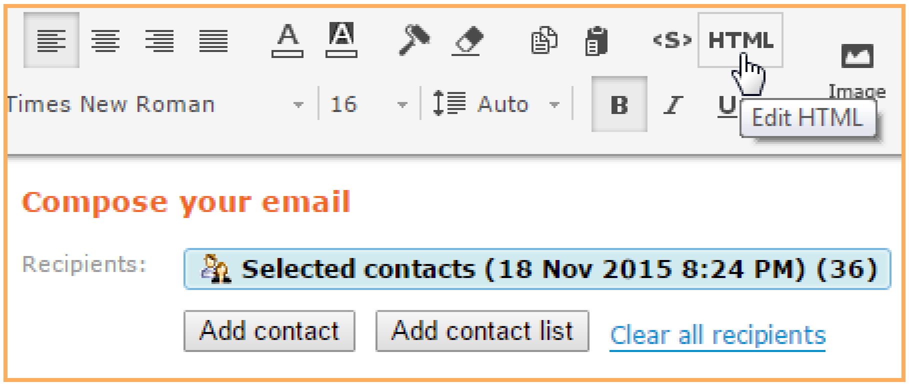


Any changes that you have made since the layout change will also be reversed.

> If you don't want a particular layout cell to appear in your email, leave the cell empty, then click the **HTML** icon on the content editor toolbar and delete all the HTML code.

Accessing the HTML code

You cannot access the HTML code for the entire message, but you can access the HTML for individual cells by clicking the **HTML** icon within the content editor toolbar.



Exception: If you're using the **Blank** template, clicking the **HTML** icon will display the HTML code for the entire message since it consists of a single cell without any layout.

Step 3: Previewing the email

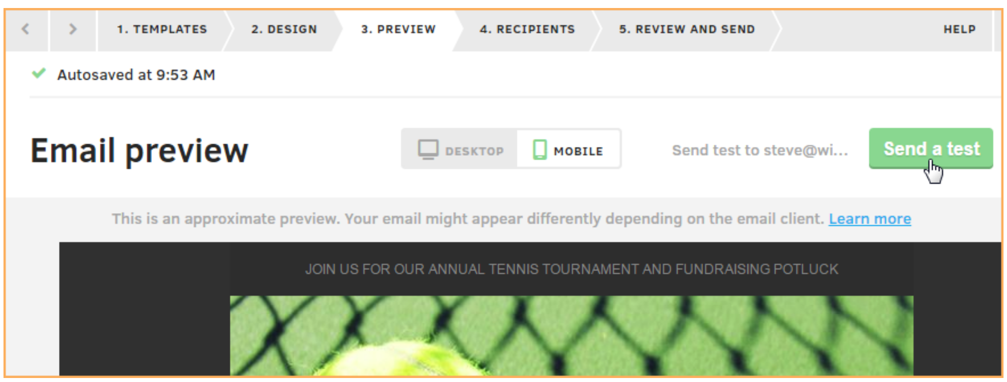
Once you are finished designing your message, you can preview your email blast. You can preview it as it would appear on mobile and desktop platforms with different screen widths.

Read more/less

A preview of the email appears while you are editing it, but for a more realistic preview, click the **Preview** tab at the top of the email wizard.

Click the preview options – Desktop and Mobile – to preview the email at different screen widths.

From here, you can send a test message to yourself by clicking the **Send a test** button.



Test emails use fake data in place of macros, not the actual data from your database. So, don't be alarmed if you see some unfamiliar content in the test message.

When you are finishing previewing your email blast, click the **Recipients** tab at the top of the email wizard to finalize the list of recipients.

Step 4: Choosing recipients and other delivery options

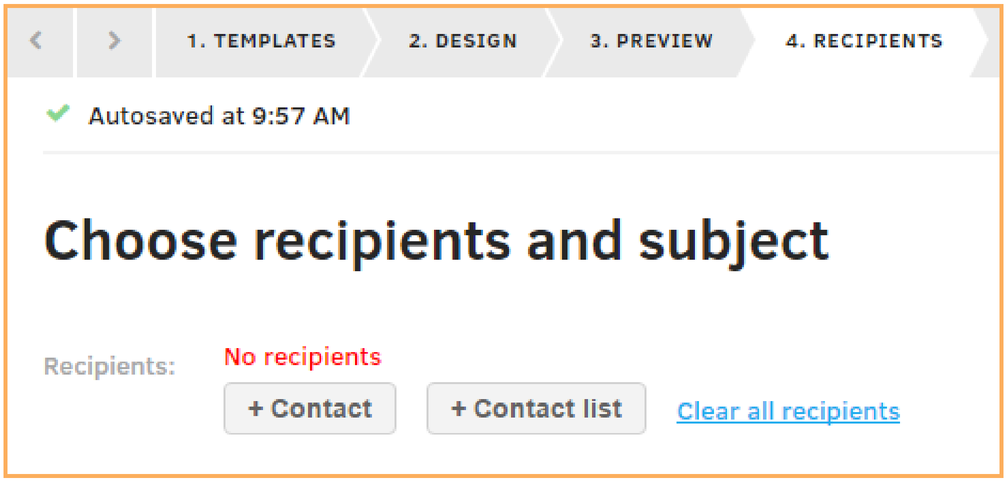
With the content of the email blast complete, you can now select your recipients or finalize the recipient list (depending on whether you started the process by selecting recipients). You can also specify the email subject, the reply-to recipient, and enable email tracking.

Read more/less

The maximum number of email recipients you can choose depends on your billing plan.

Finalizing the recipient list

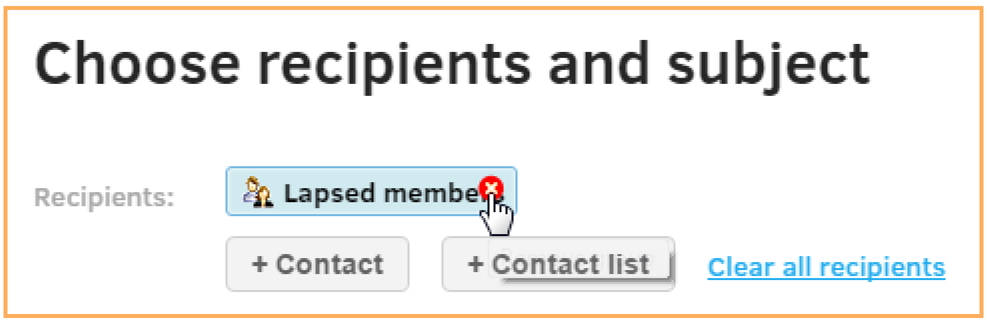
To add recipients to the list, click **+ Contact** to add individual contacts or **+ Contact list** to add lists of contacts, including results from previously saved searches.



If you add recipients using a saved search, the search will be performed when the email is sent.

For instructions on using saved searches to assemble a mailing list, see Assembling mailing lists (below).

To remove a recipient or a group of recipients, click the red X over the recipient or group.



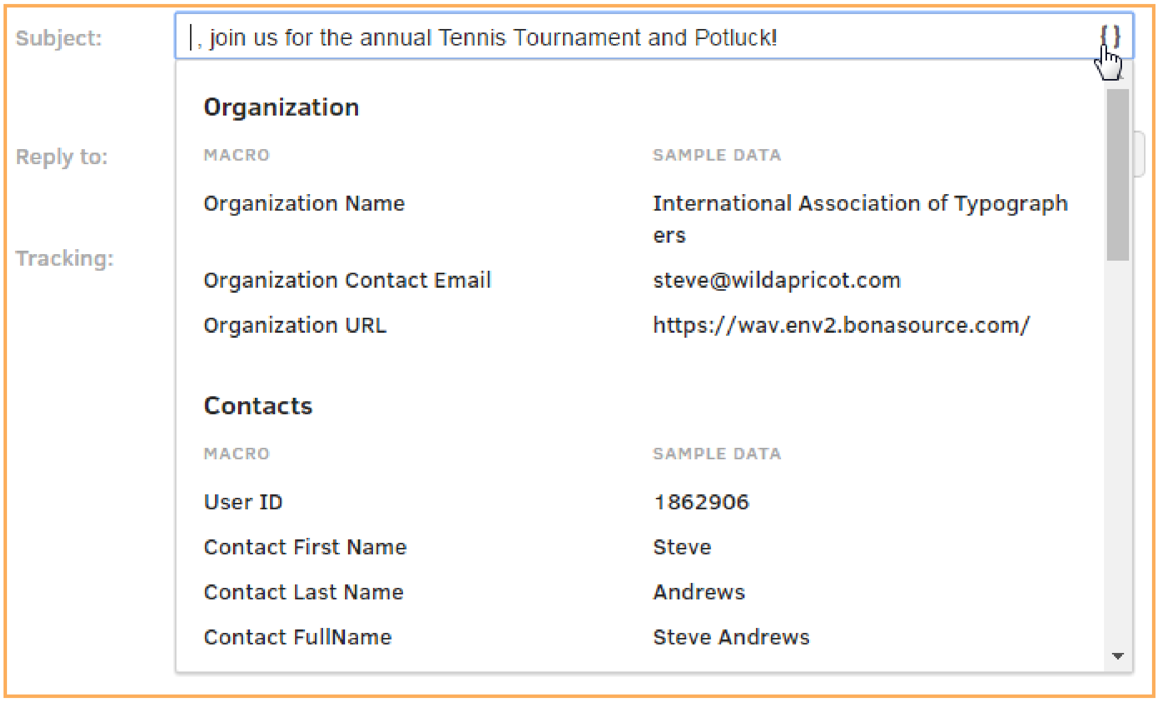
To remove all recipients, click **Clear all recipients**.

Only one email will be sent to each unique email address even if you add a recipient multiple times (directly or through groups and searches). Recipients will not see the names or email addresses of other recipients.

Specifying the email subject

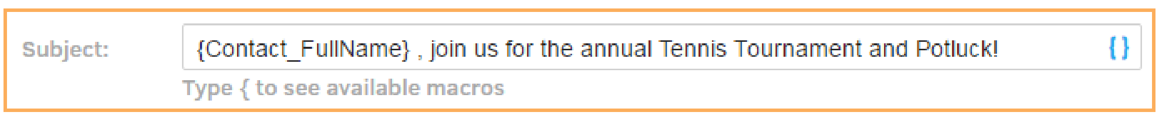
You are required to specify a subject for your email. The subject can be a mix of characters and macros, allowing you to personalize your message with information like the recipient's name. To insert a macro, follow these steps:

1. Click within the subject line where you want the macro to appear.
2. Type **{** within the **Subject** field or click the **{ }** at the end of the **Subject** field. A list of available macros appears.



Sample data is displayed beside each macro, using your own contact information.

3. Click the macro you want to insert. The macro will now appear within the subject line.



At delivery time, the macro will be replaced with the corresponding information about the contact.

Setting the Reply to address

The **Reply to** address for email blasts defaults to the address of the current administrator. You can, however, change the **Reply to** address, as well as the name of the sender, by clicking the **Change reply to** button.

Enabling email tracking

To enable email tracking, so you can see how many of your emails were opened and clicked after your email blast is sent, click the **Enable link and open email tracking** checkbox.

You can then select a different contact from your contact database.

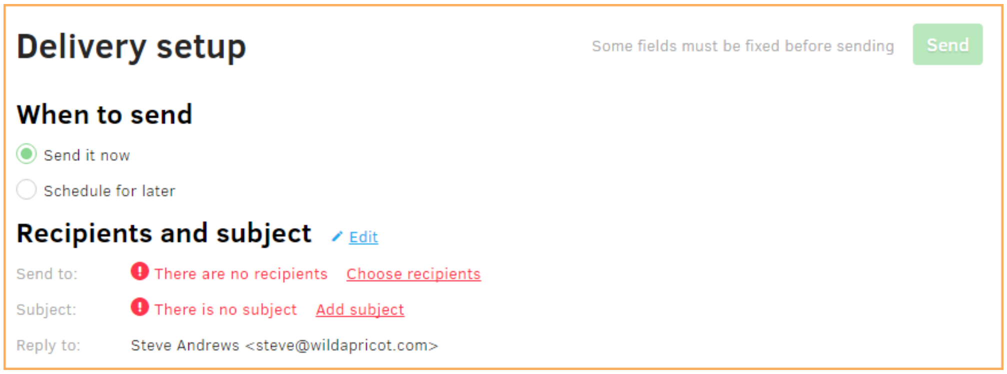
To specify a reply-to recipient who is not in your contact database, you can enter the name and email address directly in the fields provided.

Step 5: Reviewing and sending your email blast

After you've finalized the list of recipients, you can review and send your email blast. If you want, you can schedule the message to be automatically delivered at a particular date and time.

Read more/less

If there any issues with your email that would prevent it from being sent – e.g. no recipients or subject – the issues will be highlighted in red.



Until these issues are corrected, the **Send** button will be disabled. To correct an issue, click the link beside the error message.

If there are no issues that would prevent your email from being sent, you can review your message and click the **Send** button when you are ready to send your email blast.

> ⚠ Once you send your email blast, it is added to the email queue, and may take anywhere from a few minutes to a few hours to be actually delivered.

To schedule your email, click the **Schedule for later** option. With this option enabled, fields appear where you specify the date and time you want the email blast to be sent. You have to specify both the date and the time. The time you set here corresponds to your organization's timezone.

Once you specify the date and time, the **Schedule** button becomes enabled.

Clicking the **Schedule** button will schedule the message for delivery and return you to the Emails list where the scheduled email will appear. For more information, see Scheduling email blasts.

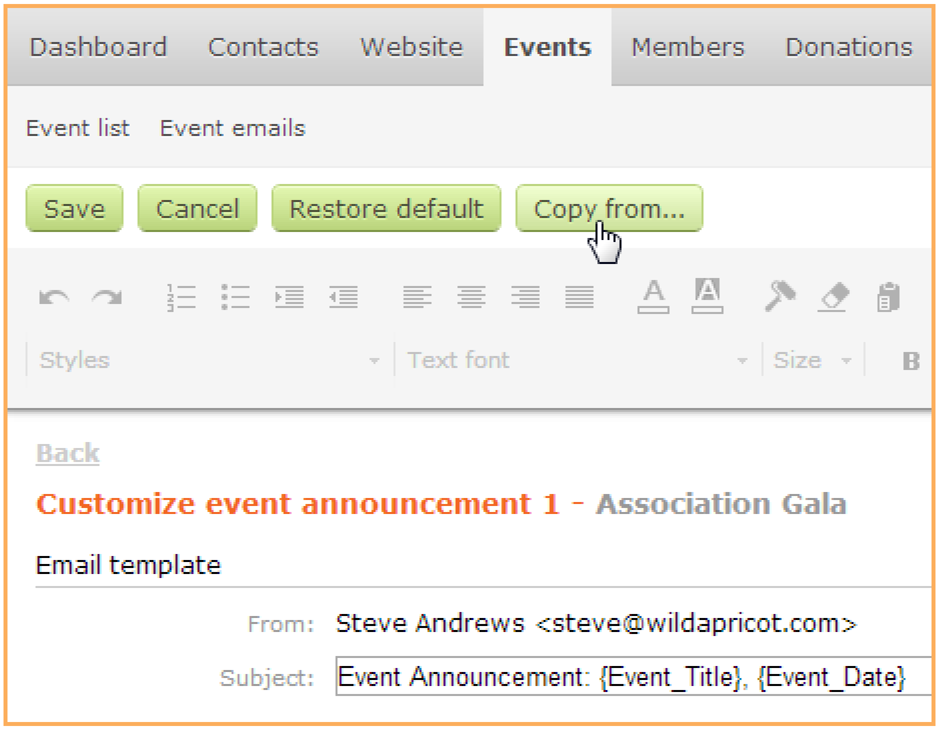
Using templates with automatic emails

When you're customizing automatic emails – like event reminders, renewal reminders, and donation confirmations – you can use email templates or previously sent emails as the basis for the automatic email.

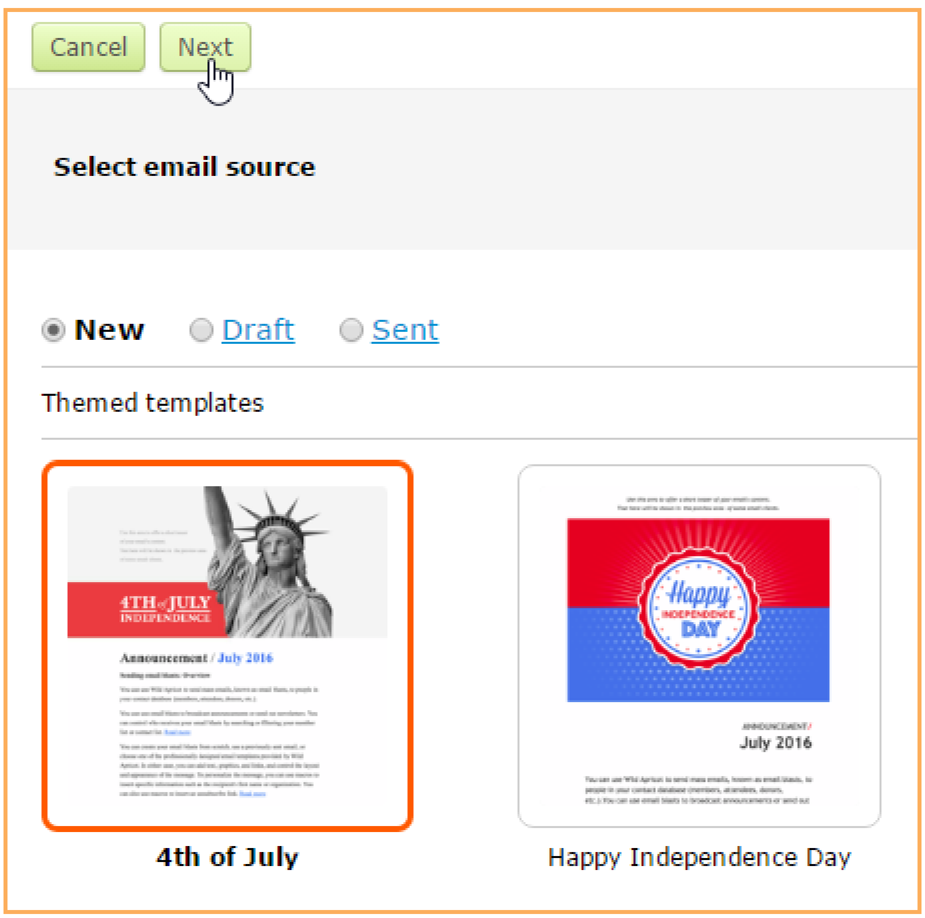
Read more/less

After choosing the template or previous email you want to use, you can customize the text, graphics, and layout as you wish. You can also personalize the message by using macros to insert specific information such as the recipient's first name or organization.

To choose a previous email or an email template as the basis for your automatic email, click the **Copy from** button.



From the screen that appears, choose the source to use as the basis for the automatic email.



You can choose to:

	Option	Next step

Use a template	New	Select a template
Use a draft email	Draft	Select the draft message
Use a previously sent message as the basis for a new one	Sent	Select the sent message

After choosing the template or previously sent email, click **Next**.

You can now customize the email.

Creating and modifying custom email templates

You can create your own custom email templates, either from scratch or by duplicating and modifying existing templates.

Creating a new template

To create a brand new email template, follow these steps:
Read more/less

1. Hover over the **Email** menu and select the **Templates** option.
2. Click **Create new template**.
3. Add the subject, message, pictures, and macros you want to appear on the template. You can also modify the HTML and choose a preview thumbnail (see below) .
4. Click **Save**.

Changes to email templates are not autosaved like changes to emails.

Duplicating an email template

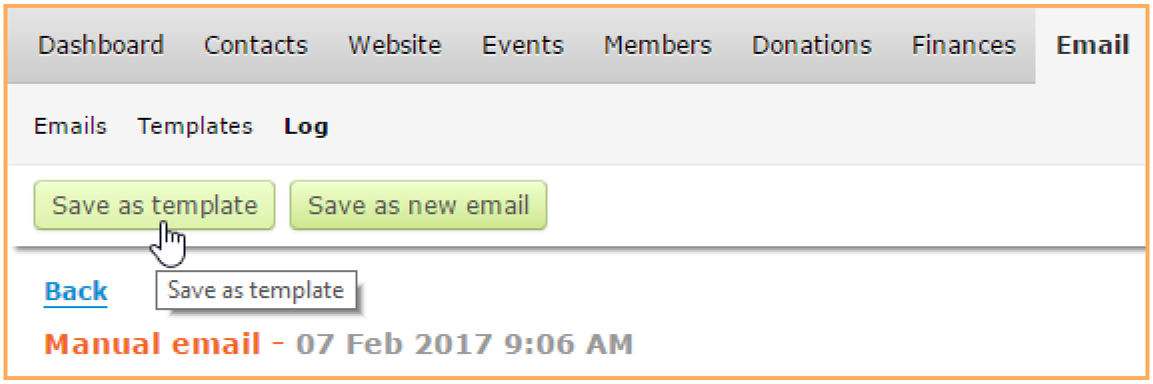
To create a new template by duplicating an existing template, follow these steps:
Read more/less

1. Hover over the **Email** menu and select the **Templates** option.
2. Click the template you want to duplicate.
3. Click **Duplicate**.
4. Add the subject, message, pictures, and macros you want to appear on the template. You can also modify the HTML and choose a preview thumbnail (see below) .
5. Click **Save**.

Creating an email template from a previously sent message

To use a previously sent email message as the basis for a new email template, follow these steps:
Read more/less

1. Open the previously sent email message within your email log.
2. Click the **Save as template** button at the top.



3. Make whatever changes you want to the contents of the new email template.

4. Click **Save**.

Modifying an email template

You can only modify custom templates – templates you have created. To modify a system template – a template supplied by Wild Apricot – duplicate the system template to create a custom template then modify the custom template.

To modify a custom email template, follow these steps:
Read more/less

1. Hover over the **Email** menu and select the **Templates** option.
2. Click the template you want to modify.
3. Click **Edit template**.
4. Make changes to the subject, message, pictures, and macros that appear on the template. You can also modify the HTML and choose a preview thumbnail (see below).
5. Click **Save**.

Choosing a preview thumbnail

You can also choose a thumbnail graphic to provide a preview of the template. To assign a preview thumbnail to the template, click **Thumbnail** while modifying the template then choose the picture you want to use as the thumbnail.

The thumbnail you choose will appear in the template list.

Deleting an email template

You cannot delete system templates – templates supplied by Wild Apricot. To delete a custom email template you have created or copied, follow these steps:
Read more/less

1. Hover over the **Email** menu and select the **Templates** option.
2. Click the template you want to delete.
3. Click **Delete**.
4. You will be prompted to confirm the deletion. Click **OK** to proceed with the deletion.

On this page:

Expand all sections

See also:

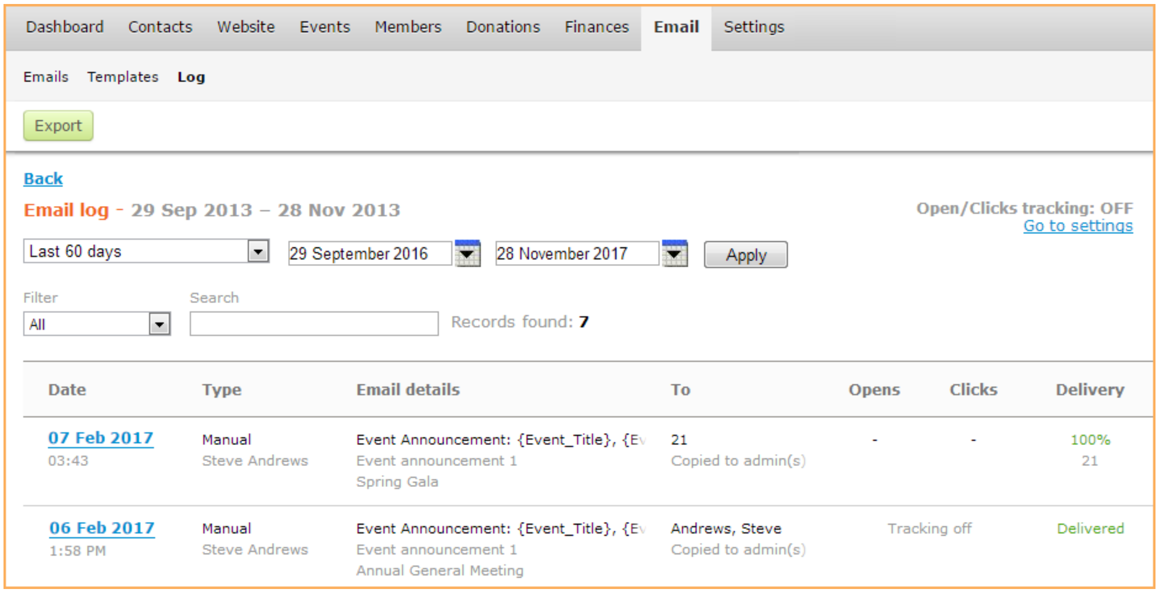
- Sending email blasts

Email log

Email log

Wild Apricot keeps a detailed log of all the emails that are sent manually (e.g. email blasts) or sent automatically (renewal reminders, event announcements, etc) from your Wild Apricot site. For each email, you can view the actual message and its delivery status, and a list of the failed and delivered email addresses. If you have email tracking enabled, you can see the number of clicks for each link. For each email message received, you can also see whether the email was opened and which links the recipient clicked on.

To view the email log, hover over the **Emails** menu then select the **Email Log** option.

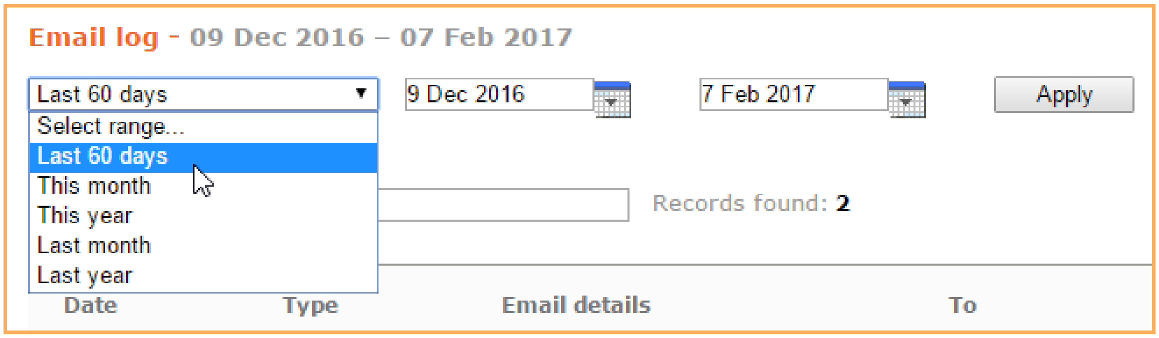


The email log displays the following information:

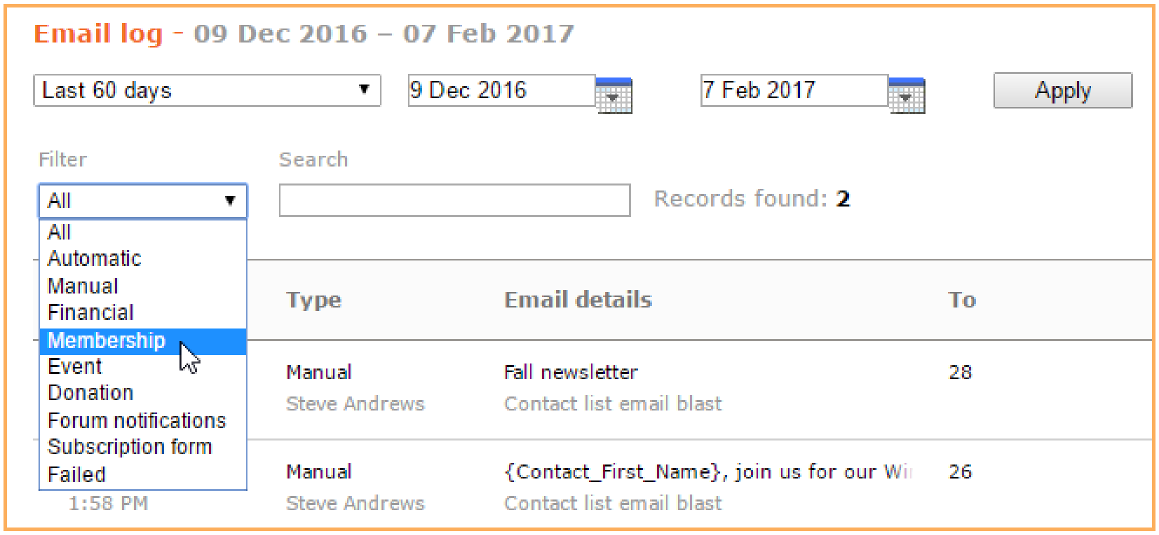
Column	Description
Date	The date and time that the email was sent.
Type	The type of email (automatic or manual). If manual, the name of the administrator who sent the email.
Email details	Summary of the email including the subject line and the origin of the email.
To	The number of recipients, or the name of the recipient if there is only one. Also, if any administrators were copied on these emails, **Copied to admin(s)** will appear.
Opens	The total percentage of these emails that were opened by the recipients. Tracking opened emails does have certain limitations so the actual number may be higher than what any email system is able to track (see Tracking emails). If the emails are still being sent, **Sending in progress** will appear. If email tracking was not enabled from your organization settings or for the individual event, **Tracking off** will appear.
Clicks	The total number of links that were clicked in the email.
Delivery	If there are multiple recipients, the percentage of delivered emails appears in green, and the percentage of failed messages appears in red. The number of delivered and failed messages appears below the percentage in each case. If there is only one recipient, a status of **Delivered** or **Failed** appears. Clicking the email will give you further information on any failed emails. For further information on undeliverable emails, see Managing undeliverable emails.

Searching and filtering emails

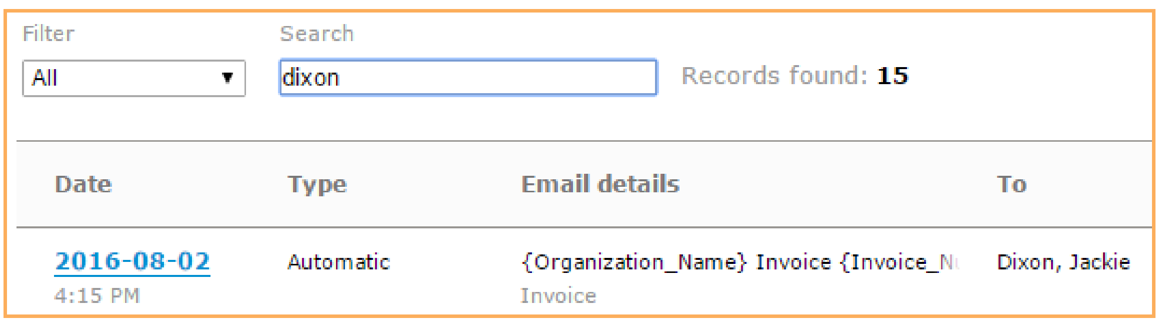
You can filter the email log to display certain types of emails, or emails within a certain time period. To filter by date, choose a range from the **Select range** list, or select your own date range in the calendar controls, then click **Apply**.



To filter the list by email type, click the **Filter** list and choose a email type.



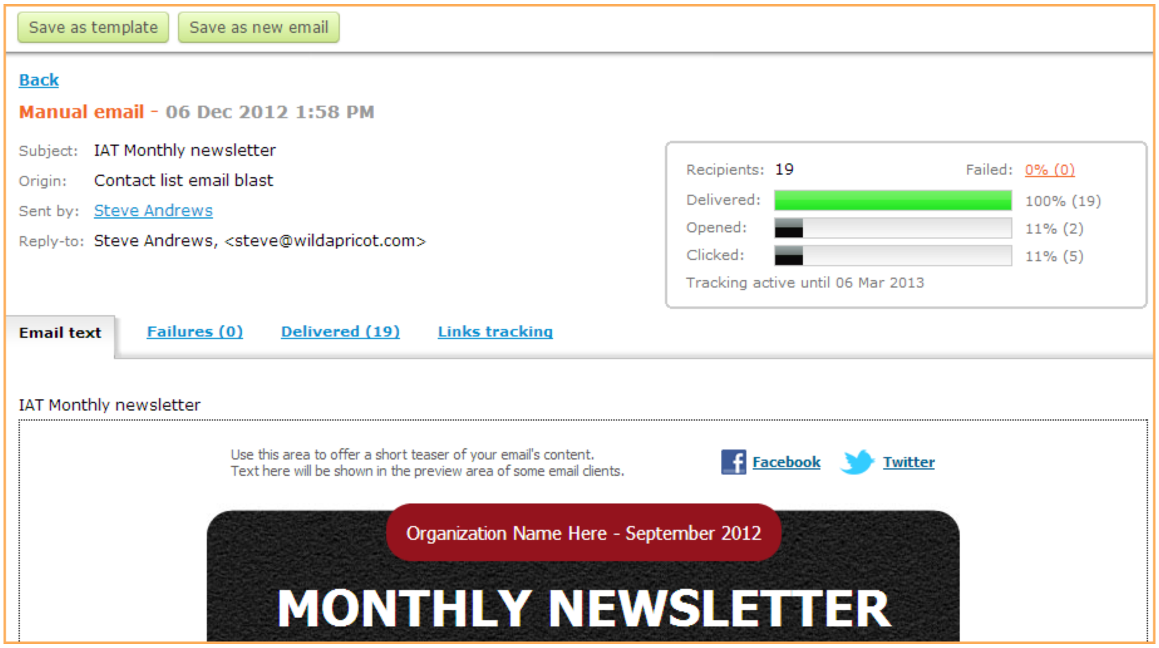
You can further filter the list by entering a **Search** string to be matched. Only emails with the specified string will be displayed.



Reviewing email details

If you click on an email within the log, you see a summary of the email delivery status. By clicking on the tabs below the summary, you can view details of the email, including:

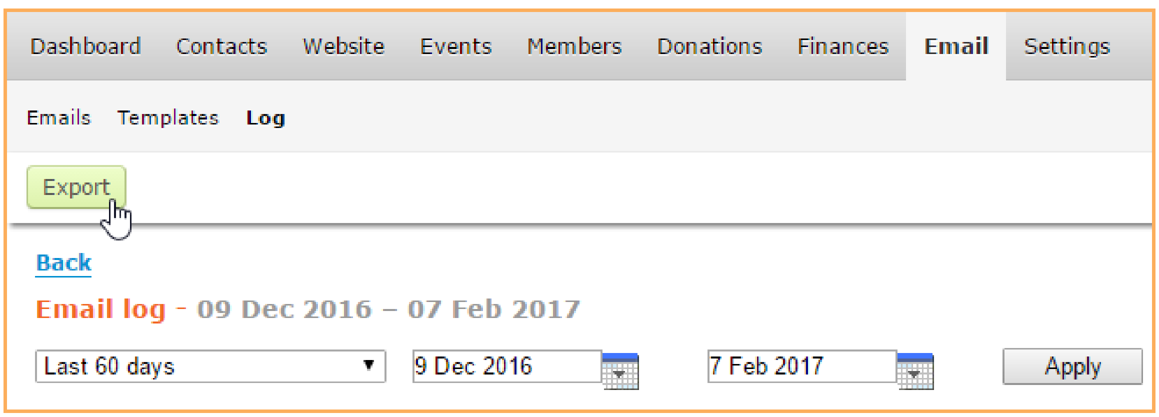
- original email text
- list of failed email addresses (see Managing undeliverable emails)
- list of recipients
- list of links clicked (if email tracking was enabled)



You can use the buttons at the top of the screen to save the message as a custom email template or use it as the basis for a new email.

Exporting the email log

You can export your filtered email log to a spreadsheet file by clicking the **Export** button.



On the screen that appears, you can select the export file format – XLS, CSV, or XML – and choose which fields to include in the export file.

⚠ The contents of your email messages will not be exported.

After you have made your selections, click the **Export** button.

While the export file is being generated, you can click the **Continue working** button and safely switch to another Wild Apricot admin screen. Once the file is generated, you'll receive an email with a link to the file.

If you waited until the export file was generated, the file will be automatically downloaded. As well, a dialog with a link to the file will appear, and an email with the link will be sent to you.

⚠ Before clicking the download link within the email, make sure you are logged into your Wild Apricot account as an administrator, and in admin view.

On this page:

- Searching and filtering emails
- Reviewing email details

- Exporting the email log

See also:

- Managing undeliverable emails
- Tracking emails
- Sending email blasts

Tracking emails

Tracking emails

When you send mass emails – both manual email blasts and automatic system emails – you might want to know how many people opened the message, and how many clicked on each link within the message. If you enable email tracking, you can go the email log and view the total number of opens and clicks, and see which recipients opened the message and clicked which links.

To view the email log, hover over the **Email** menu then click the **Log** option. To view the activity for a particular email, click the email within the log.

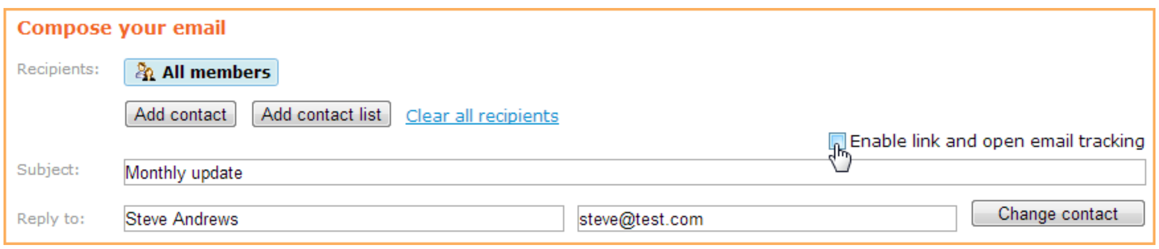
Emails are tracked for a period of three months from the date the email is sent. Any activity that takes place after that time won't be reflected in the email log.

Enabling email tracking

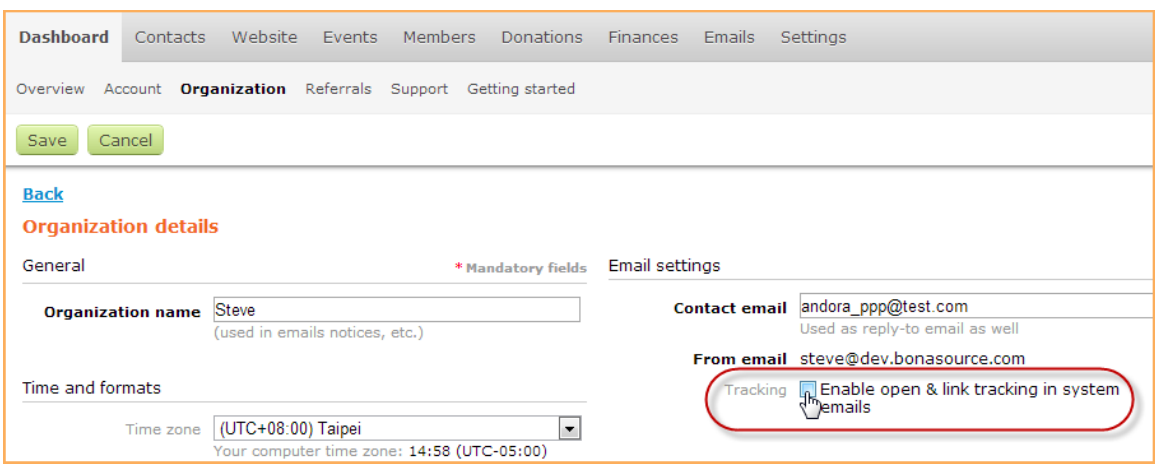
To track emails, you must enable email tracking **before** the email is sent. Enabling email tracking will not allow you to track email messages already sent.

Email tracking is enabled separately for manual email blasts and automatic system emails (e.g. event announcements).

To enable email tracking for manual email blasts, click the **Enable link and open email tracking** check box before sending the message.

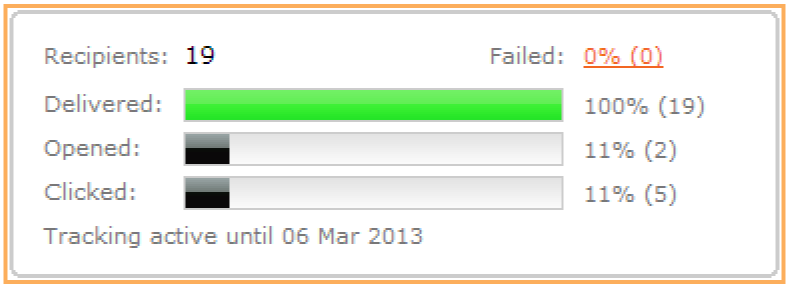


To enable email tracking in automatic system emails, hover over the **Dashboard** menu and select the **Organization** option. On the right side of the screen, check the **Tracking** check box.



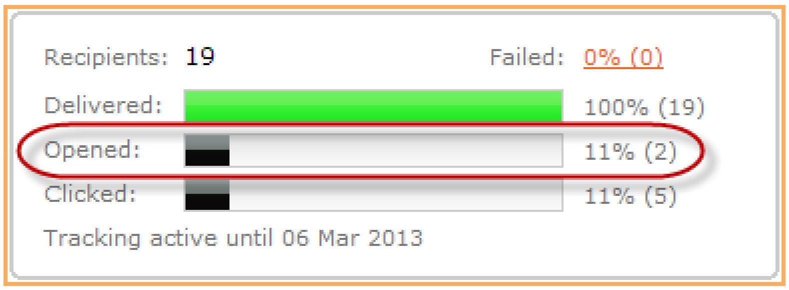
If you've enabled email tracking, a **Links tracking** tab will become available for the message within the email log, and the email summary will include:

- the number and percentage of messages that failed to be delivered
- the number and percentage of messages opened
- the number of clicks and the percentage of recipients who clicked one or more links



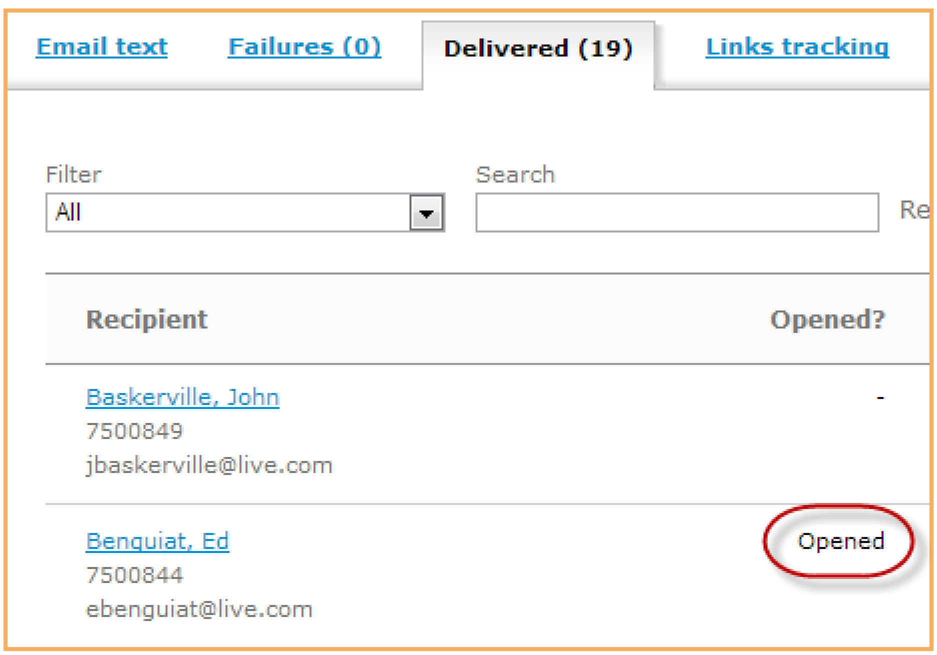
Tracking opens

With email tracking enabled, the total number of opened messages – and the percentage of messages that were opened – appears within the summary at the top.



In the above example, 2 out of 19 emails – 11% – were opened.

On the **Delivered** tab, a value of **Opened** will appear for each recipient who opened the message.



To determine whether an email message is opened, Wild Apricot uses a system called *clear pixel tracking* – in which a small transparent image is inserted into email message. When the email is opened and the image is displayed, our servers are alerted and the message is marked as opened.

> If the image is displayed within a message preview pane, the message will be counted as having been opened.

The image uses a unique code for each recipient so if the message is forwarded, any activity will be recorded for the original recipient.

> Our method of tracking opens is not 100% accurate. Email programs that block messages from displaying images may prevent our

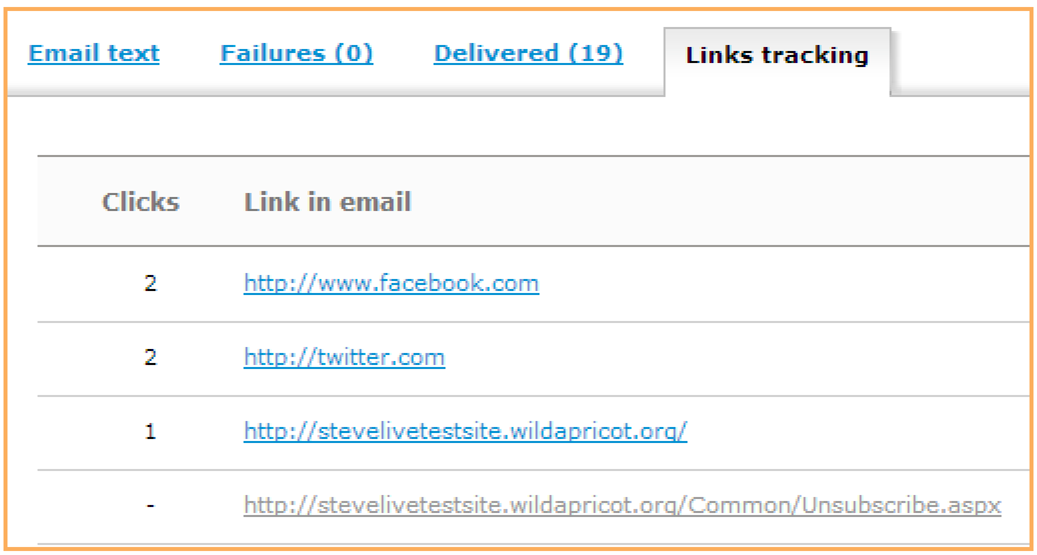
servers from determining whether the message has been opened or not.

Tracking links

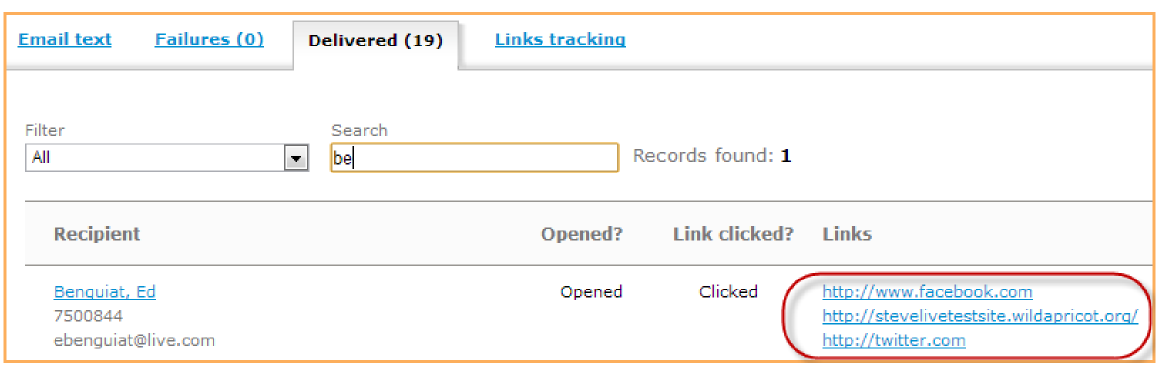
With email tracking enabled, the email summary displays the total number of links clicked, along with the percentage of messages in which at least one link was clicked. You can therefore have more links clicked than messages opened.

In the above example, in 2 out of 19 emails – 11% – at least one link was clicked. Within those 2 emails, 5 links were clicked in total.

To view the number of clicks for individual links within your email message, click the **Links tracking** tab. For each link – including the Unsubscribe link – the total number of clicks is displayed.



To view which links each recipient clicked, click the **Delivered** tab. For each recipient, the destinations of all clicked links are listed.

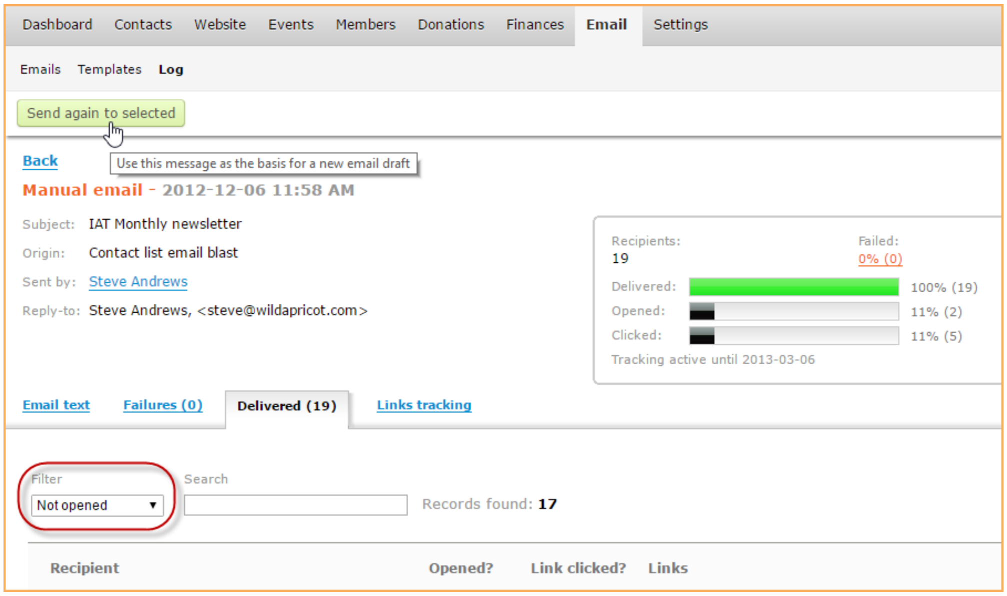


To determine when a link is clicked, Wild Apricot redirects each link to another address – where the clicks are counted – before sending it onto the actual link address. This process should be invisible to your recipients.

Sending followup emails based on email tracking

If you want to send a followup email to recipients who didn't open your message or didn't click any of its links, follow these steps:

1. Make sure that email tracking is turned on for your email blast.
2. After sending your email, go the email log, open your message and click the **Delivered** tab.
3. From the Delivered tab, click the **Filter** drop down and select either **Not opened** or **Open but not clicked**, depending on who you want to send the followup to.
4. Click the **Send again to selected** button.



5. Modify your email as you wish then send the message.

On this page:

- Enabling email tracking
- Tracking opens
- Tracking links
- Sending followup emails based on email tracking

See also:

- Email log
- Sending email blasts
- Managing undeliverable emails

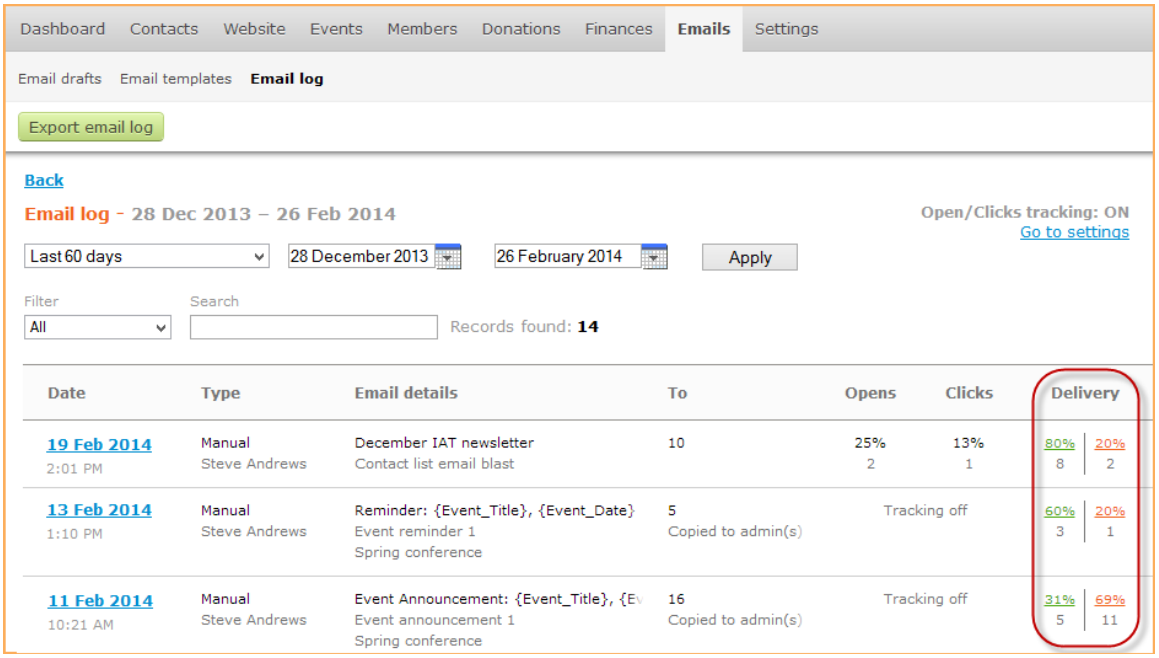
Managing undeliverable emails

Managing undeliverable emails

From the email log, you can track the status of email messages – whether they were delivered or not – for both manual email blasts and automatic emails such as renewal reminders and event announcements. Within a contact's Email settings and log, you can view the status of each email sent to the contact. Where email delivery has failed, you can view the reason for the failure.

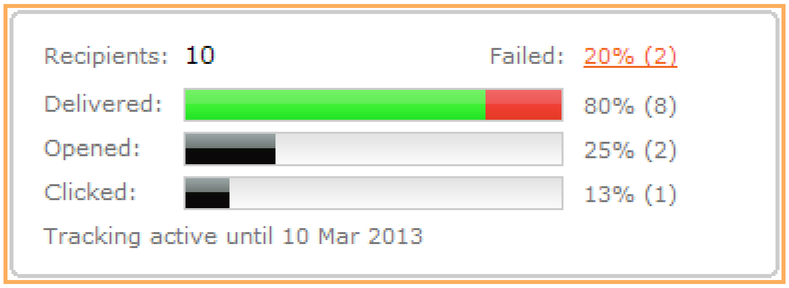
Viewing delivery summaries

Within the email log, the status of each email appears under the **Delivery** column.



If there are multiple recipients, the percentage of delivered emails appears in green, and the percentage of failed messages appears in red. The number of delivered and failed messages appears below the percentage in each case. If there is only one recipient, a status of **Delivered** or **Failed** appears.

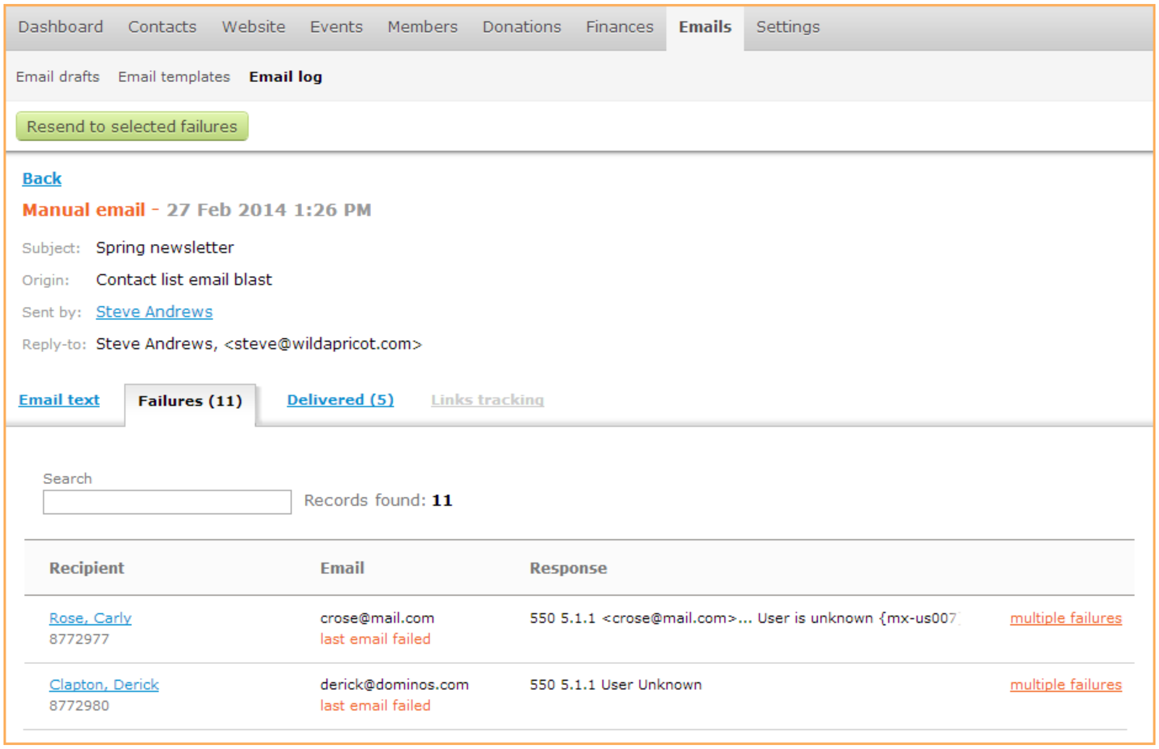
If you click an email within the list, you can view more information about the email message, including a complete list of the delivered and failed email addresses. A summary of the message status also appears.



Viewing delivered and failed email addresses

To view the list of email addresses to which the message was successfully delivered, click the **Delivered** tab within the email details view. If you had email tracking enabled, you can see whether each recipient opened the email and which links were clicked.

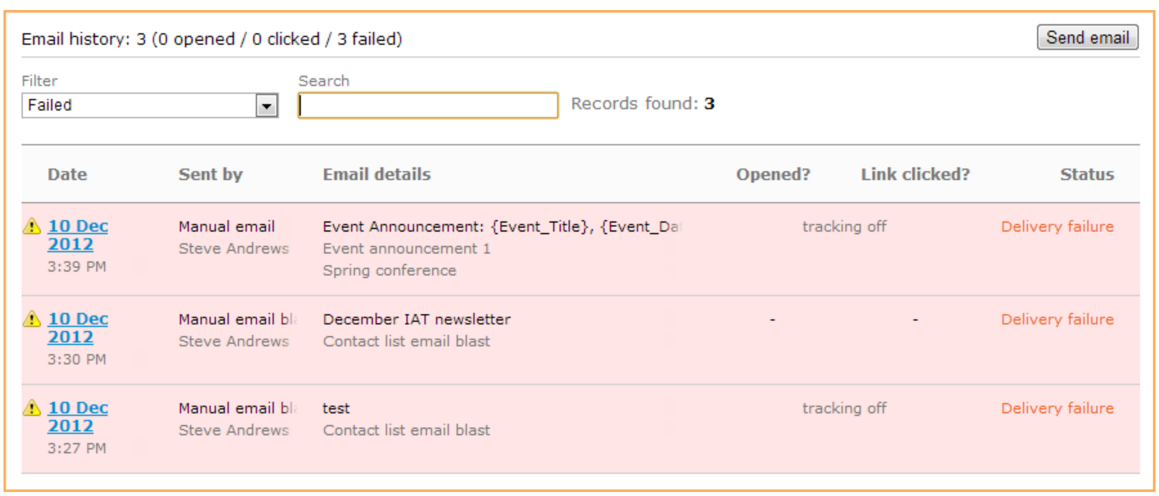
To view a list of email addresses to which delivery has failed, click the **Failures** tab.



To send all the failed email messages again, click the **Resend to selected failures** button. For failed invoice emails, do not resend from the email log, but instead open the invoice from the **Finances** tab and click the **Email** button.

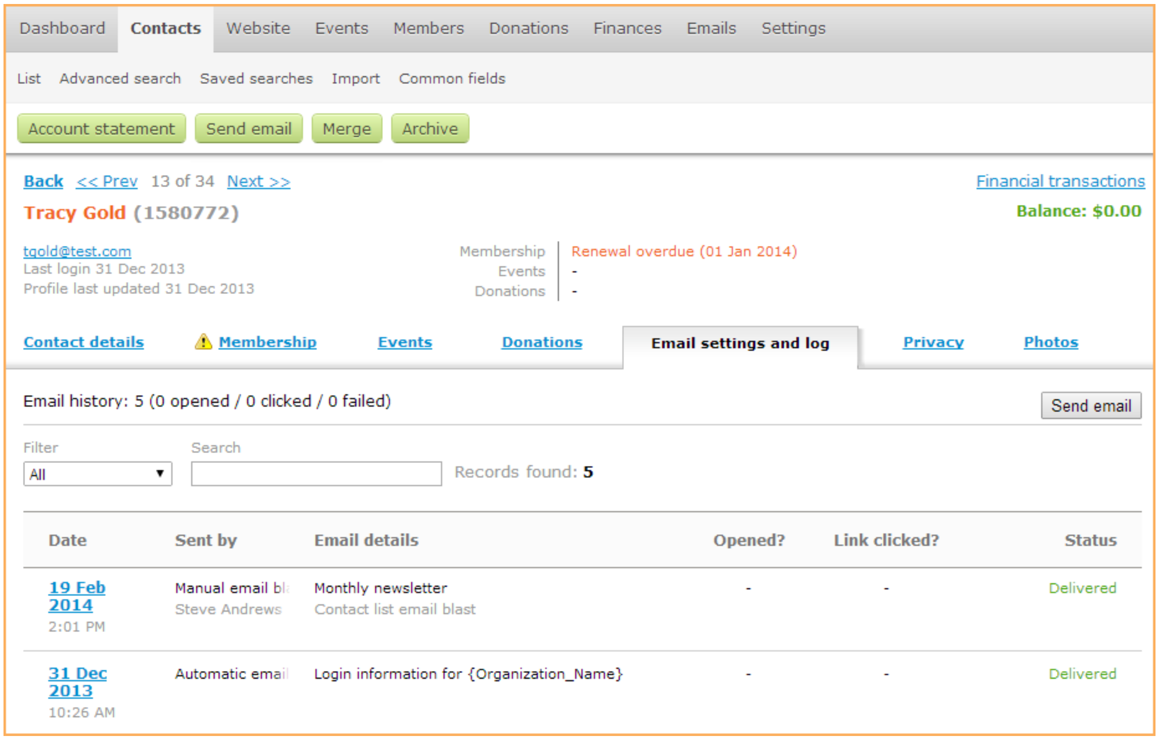
For each email failure, the list displays the intended recipient (i.e. the contact), the email address, and the response received from the email server (i.e. the reason for the failure). See Troubleshooting email delivery failures (below) for explanations of some of the more common failure messages.

If the contact has experienced multiple email failures, you can click the **multiple failures** link to display a complete list of email failures for that contact.

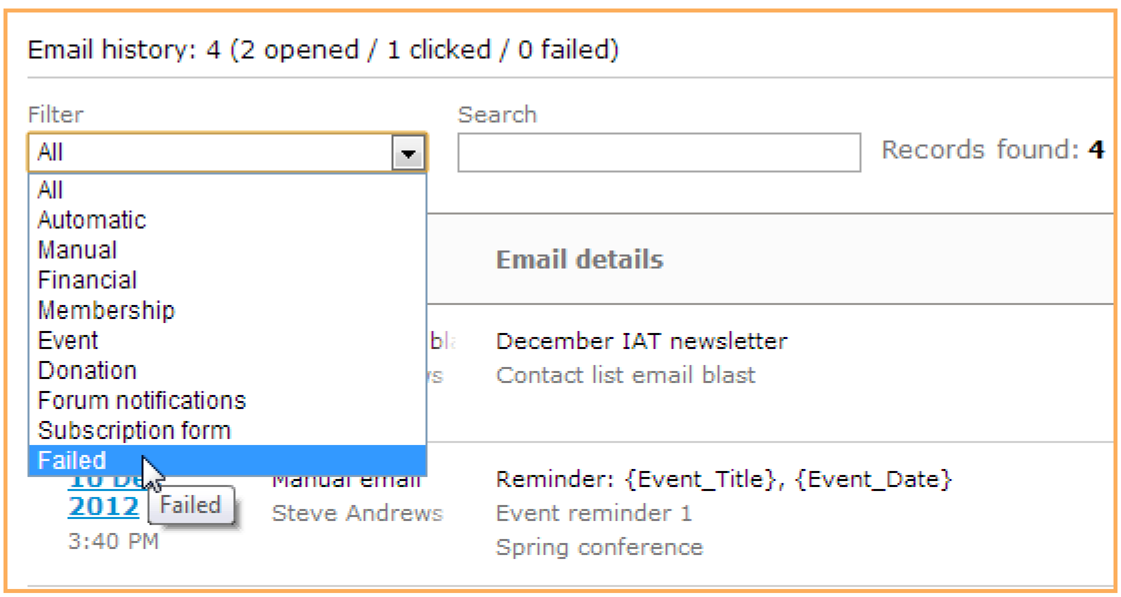


Viewing a contact's email history

To view a contact's complete email history – including both delivered and failed emails – click the **Email settings and log** tab within the contact record.

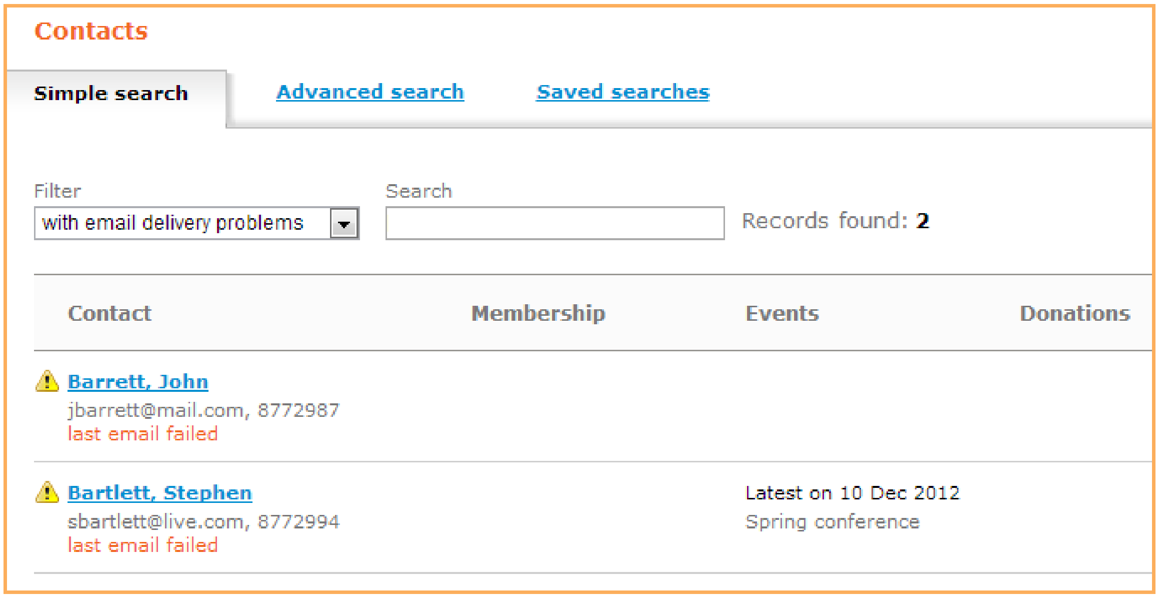


To filter the email list to display only certain kinds of messages – automatic, manual, failed, etc. – click the **Filter** drop-down and select an option. To perform a keyword search, enter a search string in the **Search** field.



Searching for delivery problems

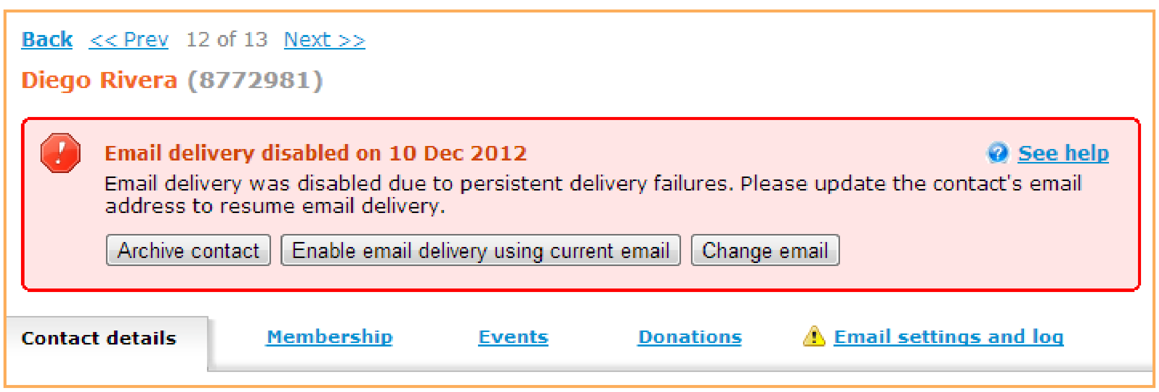
To search for contacts with email delivery problems, go to the **Contacts** tab. Within the **Simple search** tab, click the **Filter** drop-down and select **with email delivery problems**. A list of contacts with at least one failed email delivery will appear.



To archive all the contacts with email problems, you can export this list to a spreadsheet, change the values in the **Archived** column to **yes**, then reimport the spreadsheet. For more information, see Bulk changes using import and export.

Automatically disabling emails for contacts with persistent delivery problems

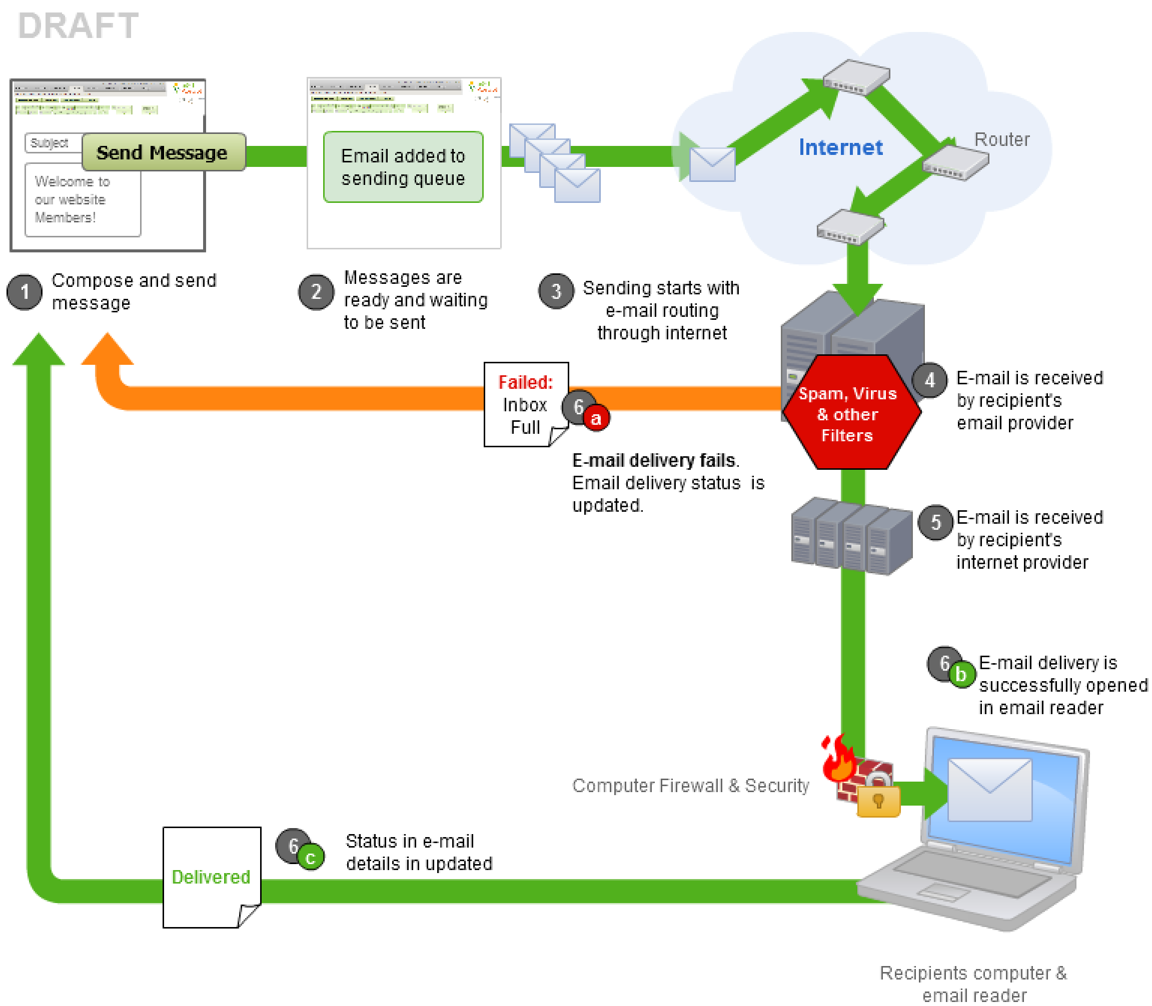
Contacts who experience persistent email delivery problems will eventually have email delivery automatically disabled by Wild Apricot. Where email delivery has been disabled, a warning message will appear on the contact record.



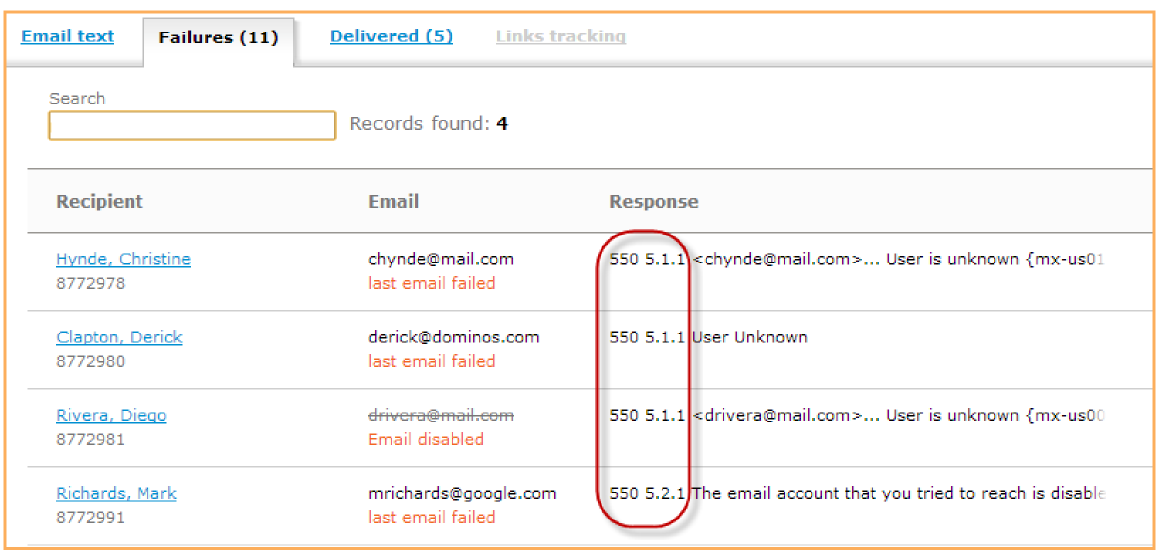
The options that appear within the message allow you to archive the contact, re-enable email delivery using the existing email address, or enter a new email address for the contact.

Troubleshooting email delivery failures

The process of sending an email from your account to your contact's inbox involves many steps. Below is a very simplified version of how an email starts from your account and reaches – or doesn't reach – your recipient.



If something goes wrong, Wild apricot may receive a response message from the recipient's mail server that provides an error code and a partial explanation of the problem. The responses received for each message will appear in the list on the **Failures** tab.



Email text | Failures (11) | Delivered (5) | Links tracking

Search

Records found: 4

Recipient	Email	Response
Hynde, Christine 8772978	chynde@mail.com last email failed	550 5.1.1 <chynde@mail.com>... User is unknown {mx-us01
Clapton, Derick 8772980	derick@dominos.com last email failed	550 5.1.1 User Unknown
Rivera, Diego 8772981	~~drivera@mail.com~~ Email disabled	550 5.1.1 <drivera@mail.com>... User is unknown {mx-us00
Richards, Mark 8772991	mrichards@google.com last email failed	550 5.2.1 The email account that you tried to reach is disable

See below for a list of common error codes and possible resolutions.

Response code	Description	Suggested resolution

421	Service not available, closing transmission channel	Retry or notify recipient
450	Requested action not taken; mailbox unavailable or busy	Retry or notify recipient
451	Requested action aborted, local error in processing	Retry or notify recipient
452	Requested action not taken, insufficient system storage	Retry or notify recipient
500	Syntax error, command unrecognized. Also command line too long	Notify Wild Apricot support
501	Syntax error in parameters or arguments	Notify Wild Apricot support
502	Command not implemented	Notify Wild Apricot support
503	Bad sequence of commands	Notify Wild Apricot support
504	Command parameters not implemented	Notify Wild Apricot support
550	Action not taken. Mailbox unavailable. Not found, not accessible	Retry or notify recipient
551	User not local, please try <suggestion>	Retry or notify recipient
552	Exceeded storage allocation	Retry or notify recipient
553	Mailbox name not allowed. Mailbox syntax may be incorrect	Retry or notify recipient
554	Transaction failed	Retry or notify recipient

AOL emails

AOL email servers automatically reject all incoming 3rd party email domains that start with AIM or AOL (e.g. an email coming from "info@AimAssociation.com" or "admin@AolAssociation.wildapricot.org" is not allowed). This means if your primary Wild Apricot domain starts with AIM or AOL (as in AimAssociation.com), Wild Apricot will use @AimAssociation.com as the FROM email for all outgoing emails, and all emails to anyone on AOL will bounce as a result for using an "unauthorized IP".

> To send emails to contacts with AOL email addresses, make sure your FROM email and REPLY-TO email domain do NOT start with @AIM or @AOL. You can check the current FROM email and default REPLY-TO emails in Organization details.

As well, AOL has instituted limits on the number of emails you can send to their servers per hour and per day. If you exceed the limit, AOL may fail to deliver your email.

On this page:

See also:

- Email log

- [Contact email settings and log]
- [Sending email blasts]
- [Tracking emails]

Routing of system emails

Routing of system emails

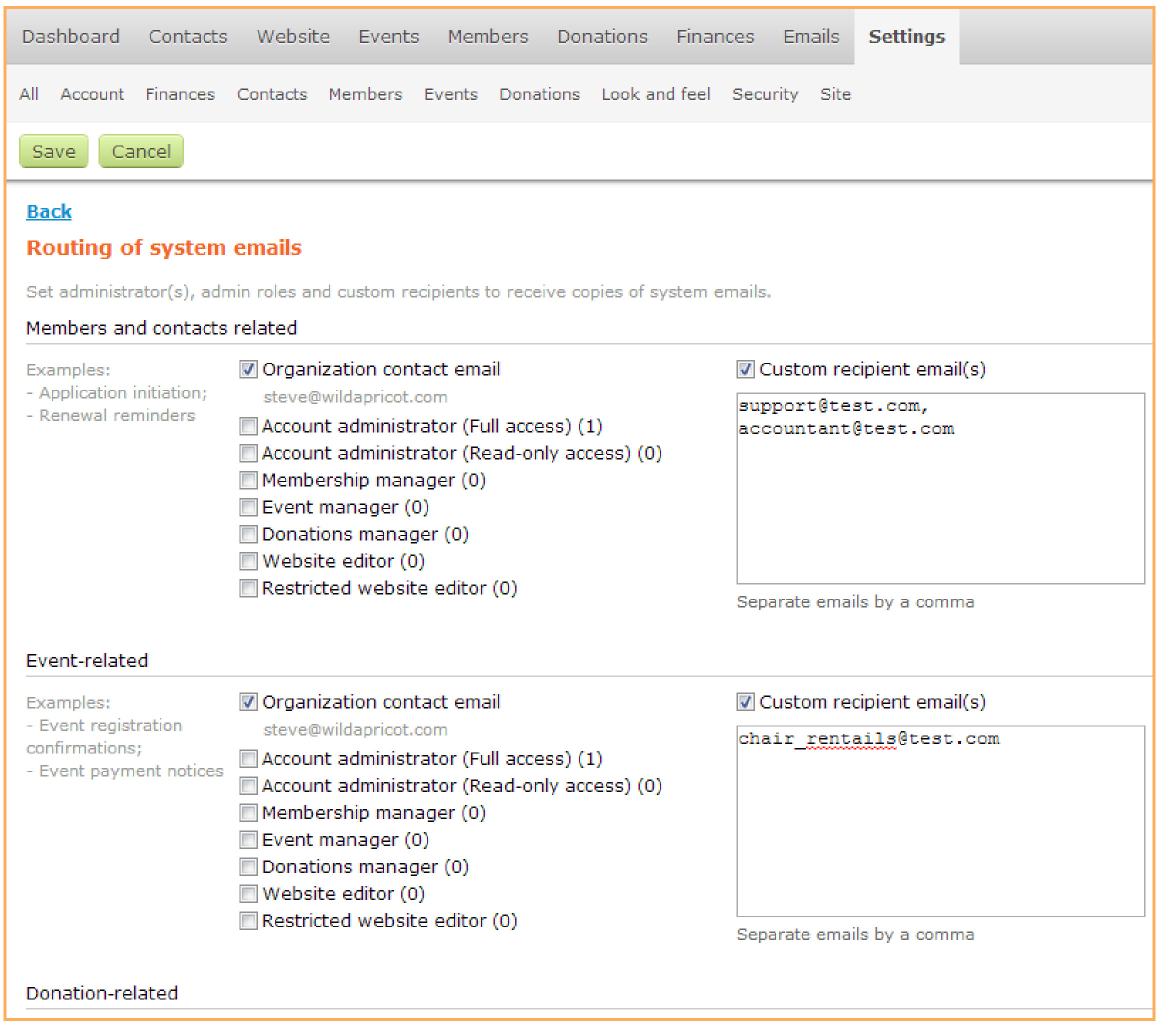
You can set up *email routing* to automatically send copies of system emails to administrators and/or other recipients. For example, you might want your event manager to automatically receive copies of event registration notifications, and your membership manager to get membership-related notifications.

The exact time these automatic system emails are sent will depend on your organization's time zone (see Automatic emails schedule).

For instructions on designating contacts as different kinds of administrators, including event managers and membership managers, see Managing site administrators.

Setting up email routing

To set up email routing, hover over the **Settings** menu and select the **Site** option. Under **Site settings**, click the **Routing of system emails** link. From the screen that appears, you select the recipients for each email category.



Wild Apricot system emails are divided into the following categories:

- **Member-related** – includes emails such as member renewal reminders, member application confirmations, email subscription confirmation, etc
- **Event-related** – event registration confirmations
- **Donation-related** – donation confirmations

- **Billing documents** – payment receipts, invoices, donation receipt

For each email category, you can set it up so that copies of emails go to:

- **Organization contact email** – your site's main contact. To change it, select **Organization** under the **Dashboard** menu.
- **Account administrators** – including those with full, read-only, and limited access (e.g. Website editor). For more information, see Managing site administrators. The number in brackets indicates how many people are currently in each category.
- **Custom recipient email(s)** – when this option is enabled, you can enter one or more email addresses. These emails do not have to be contacts in your database. Multiple emails should be separated by commas.

The numbers that appear within parentheses indicate the number of contacts who have been assigned those roles. For instructions on assigning roles to contacts, see Managing site administrators.

Including administrators and custom emails, you can set up to 25 recipients per category.

For event emails, you can enable or disable email routing for each event separately, and assign event-specific organizers. By default, event emails are sent to the event organizer only, and email routing is ignored. To enable routing for event emails, check the **Copy emails according to email routing settings** option for the event. For more information, see Event emails.

List of emails by category

The following is a list of emails that associated with each email category:

Category	Emails

Membership and contacts related	• Customizable:
	  ◦ Member Application initiation
	  ◦ Member activation
	  ◦ Bundle administrator activation
	  ◦ Bundle member activation
	  ◦ Member Application Invoice
	  ◦ Member Application Receipt
	  ◦ Membership Renewal reminder 1
	  ◦ Membership Renewal reminder 2
	  ◦ Membership Renewal day notice
	  ◦ Membership Grace period notice
	  ◦ Membership Lapsed notice
	  ◦ Free member renewal
	  ◦ Manual member renewal initiated
	  ◦ Member renewal finalized
	  ◦ Member renewal canceled by member
	  ◦ Online member renewal succeeded
	  ◦ Online member renewal failed - PayPal Standard
	  ◦ Credit card expiry notification
	  ◦ Recurring renewal failed
	• Non-customizable emails:
	  ◦ Member Application Failed - PayPal Standard
	  ◦ Member Upgrade Initiated
	  ◦ Member Upgrade Succeeded
	  ◦ Member Upgrade Failed- - PayPal Standard

Event-related	• Customizable:
	  ◦ Event paid confirmed registrations (online)
	  ◦ Event paid confirmed registrations (manual)
	  ◦ Event paid pending registrations (manual)
	  ◦ Free event registrations
	• Non-customizable:
	  ◦ Event online payment failed email - PayPal Standard
	  ◦ Event offline paid pending registrations
	  ◦ Event online paid confirmed registrations
	  ◦ Limit number of event registration reached

Donation-related	• Customizable:
	  ◦ Donation confirmation
	• Non-customizable
	  ◦ Donation failed - PayPal Standard

Billing documents	• Customizable:
	  ◦ Invoice
	  ◦ Payment receipt
	  ◦ Donation receipt

On this page:

- Setting up email routing
- List of emails by category

See also:

- Event emails
- Sending email blasts
- Organization details
- Managing site administrators

Controlling the delivery of automatic emails

Controlling the delivery of automatic emails

You can control the delivery of different kinds of automatic Wild Apricot emails.

Membership emails

Automatic emails are sent when someone applies for membership in your organization, when they approach their membership renewal, and when they renew their membership. For details on controlling who receives these emails and when, see below.

Membership application emails

Membership application emails are sent when someone completes the membership application form. Bundle activation emails are sent when a new membership bundle is created, or a new member is added to an existing bundle.

> Automatic emails are not sent when a contact or member is added manually by an administrator. An administrator can manually send a password email to the contact by clicking the **Email new password** button from the **Login details** section of the **Contact details** tab on their contact record.

To control the delivery of membership application emails or bundle activation emails, go to the New applications tab for each membership level.

Email type	Turn on/off?	Timing	Recipients
Application initiation	Yes	When member application is submitted and it requires payment or administrator approval	Applicant and/or organization contact
Member activation	Yes	When new membership is activated or application invoice is fully settled	Member and/or organization contact
Bundle administrator activation	Yes	When new membership bundle is created or application invoice is fully settled	Bundle administrator and/or organization contact
Bundle member activation	Yes	When new member is added to a membership bundle.	Member, bundle administrator, and/or organization contact

See also Invoices and receipts (below).

Renewal reminders

Renewal reminders and invoices are sent when a membership has not been renewed. To control the delivery of renewal reminders and invoices, go to the Renewal policy tab for each membership level.

The delivery of renewal invoices is not affected by the invoice settings on the Invoice and receipt settings screen.

Email type	Turn on/off?	Timing	Possible recipients
Reminder 1, 2	Yes	*x* number of days before renewal date	Member and/or organization contact
Renewal invoice	Yes	Same as Reminder 1	Member and/or organization contact
Renewal day notice	Yes	Renewal day	Member and/or organization contact
Grace period notice	Yes	*x* number of days after renewal date	Member and/or organization contact
Lapsed notice	Yes	*x* number of days after renewal date	Member and/or organization contact

Renewal notifications

Renewal notifications are sent when a membership has been renewed, or when an automatically recurring renewal has failed. To control the delivery of renewal notifications, go to the Renewal policy tab for each membership level.

Member level change emails cannot be customized or turned off.

Email type	Turn on/off?	Timing	Possible recipients
Renewal pending	Yes	When membership renewal is initiated but renewal fee has not been paid online within 15 minutes	Member and/or organization contact
Renewal confirmed	Yes	When membership renewal fee is fully paid	Member and/or organization contact
Credit card expiry notification	Yes	Two weeks before and on date of credit card expiry. Applies only to Stripe, Authorize.Net, Moneris, and Payflow Pro payment gateways.	Member and/or organization contact
Recurring renewal failed	No	When recurring payment for membership renewal fails	Member and organization contact
Member level change initiated	No	When membership level change is initiated (unless online payment is completed within 15 minutes)	Member
Member level change succeeded	No	When the new membership fee has been fully paid	Member and organization contact

See also Invoices and receipts (below).

Event emails

For event emails, you can control whether each type of message is sent, and who receives the messages. For announcements and reminders, you can control when the email is sent.

Email delivery is controlled separately for each event. To control email delivery for a particular event, go the **Emails** page for the event then click the **Edit** button.

You can control the following aspects of email delivery for each event.

Email type	Turn on/off?	Timing	Possible recipients
Announcement 1, 2, 3	Yes	*x* number of days before event	All contacts, or any combination of members, donors, attendees from past events, membership levels, member groups, saved searches, or c ontacts without membership, registrations, or donations
Reminder 1, 2, 3	Yes	*x* number of days before event	Existing registrants
Registration confirmed	Yes	Immediately	Registrant, registrant's guests, and/or event organizer
Registration pending	Yes	*When registrant clicks* ***Pay online*** *button:* After 15 minutes, unless online payment has been completed *When registrant clicks* ***Confirm*** *or* ***Invoice me*** *button* : Immediately	Registrant, registrant's guests, and/or event organizer
New waitlist registration	Yes	Immediately	Waitlist registrant and/or event organizer

See also Invoices and receipts (below).

All event emails can be customized. For more information, see Modifying event emails.

Donations

For donations, you can control whether a confirmation message and a receipt are sent to the donor and/or administrator,

Email type	Turn on/off?	Timing	Possible recipients
Confirmation	No	When the donation form is completed and payment is made	Donor
Receipt	Yes	When donation payment is received	Donor and/or organization contact

For information on customizing the confirmation email, see Customizing the donation confirmation email. For information on customizing donation receipts, see Customizing invoices and receipts .

Invoices and receipts

You can control whether invoices and receipts are sent to the payer and/or administrator, but any changes you make will be applied to all invoices and receipts issued throughout your entire system.

Email type	Turn on/off?	Timing	Possible recipients

Invoice	Yes	*When payer clicks* ***Pay online b utton:*** After 15 minutes, unless online payment has been completed *When payer clicks* ***Confirm*** *or* ***I nvoice me*** *button* : Immediately *For donations:* Never	Payer and/or organization contact
Receipt	Yes	When payment is received	Payer and/or organization contact

For information on customizing invoice and receipt emails, see Customizing invoices and receipts.

Turning off automatic emails

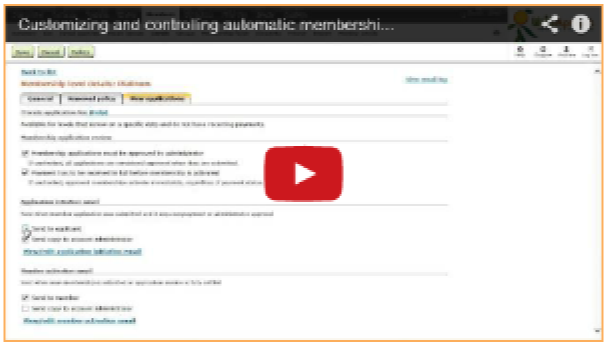
Some automatic emails cannot be turned off, including:

- Member level change emails
- Recurring renewal failure notice
- Donation confirmations

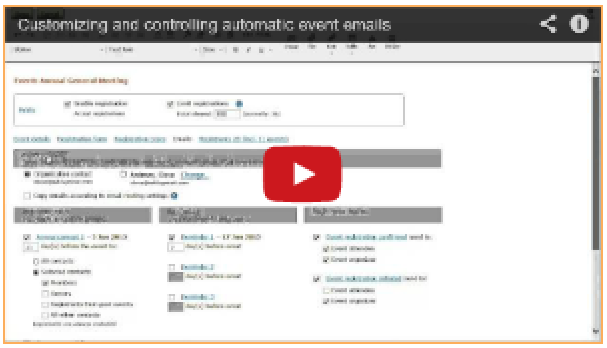
To turn off the remaining automatic emails, follow the instructions below.

Email type	To turn it off...
New membership emails	1. Go to the New applications tab for each membership level. 2. Uncheck everything under **Application initiation email** and **M ember activation email**.
Renewal reminders and notifications	1. Go to the Renewal policy tab for each membership level. 2. Uncheck the email options under **Renewal reminders and actions** and **Renewal notifications**.
Event emails	1. For each event, begin editing the event details. 2. Click the Emails tab. 3. If any of the event announcements or reminders are scheduled to be sent, click **Change schedule** then click **Remove schedule**. 4. Uncheck everything under **Registration emails**.
Invoices	1. Hover over the **Finances** menu then click **Invoice and receipt settings** . 2. Uncheck **Send invoices for pending payments**.
Payment receipts	1. Hover over the **Finances** menu then click **Invoice and receipt settings**. 2. Uncheck **Send receipt to payer**.
Donation receipts	1. Hover over the **Donations** menu then click **Donation receipt** . 2. Uncheck everything under **Email donation receipt to**.

In each case, you must save your changes when finished.



Customizing and controlling automatic
membership emails (3:23)



Customizing and controlling automatic
event emails (2:17)

On this page:

See also:

- Automatic emails schedule
- Routing of system emails
- Event emails
- Customizing invoices and receipts
- Renewal policy
- New applications
- Sending email blasts

Automatic emails schedule

Automatic emails schedule

Wild Apricot sends out a number of automatic emails according to your settings.

Event announcements and reminders are queued for delivery according to the start time of the event. For example, if the event's start time is 5pm PST, then the announcement or reminder is queued for 5pm PST on the date you choose.

If you want the announcement or reminder to be sent the day of the event, you will need to schedule the email to be sent 0 days before the event.

If you are setting up announcements or reminders to be sent today for an event in the future, then the event's start time will not be a factor. For example, if you set up the email schedule at 6pm and the start time of your event is 5pm, the announcement or reminder will still be sent out today as soon as the queue is free.

Actual delivery might be plus or minus a few hours due to queueing and batching first on our end and then on recipients' mail servers.

When are emails sent?

Emails are queued to be sent by our servers at regular intervals.

Email	Sent
Event announcements/reminders	every half an hour
Automatic member renewals	every half an hour
Discussion forum daily notifications	every hour
Discussion forum weekly notifications	every hour

When are emails received?

The table below indicates when your contacts will receive different types of automatic emails:

Email	Sent	Timezone Used
Event announcements/reminders	*n* days before the event's start time (where *n* is the number of days specified on the event's Emails tab)	Event timezone
Automatic member renewals	*n* days before / after renewal date (where *n* is the number of days specified on the membership level's Renewal policy tab)	Organization timezone
Discussion forum daily notifications	approx. 12pm (previous day updates)	Organization timezone
Discussion forum weekly notifications	approx 12pm Sunday (previous week updates)	Organization timezone

On this page:

See also:

- Scheduling event emails
- Membership levels
- Default membership emails
- Controlling the delivery of automatic emails

Unsubscribing to emails

Unsubscribing to emails

Your Wild Apricot site can send out different types of emails, including:

- automated event emails
- manual email blasts
- forum subscriptions
- automatic system emails, known as *workflow emails*

Contacts can unsubscribe separately for each type of email – except for workflow emails. Once they unsubscribe, they will no longer receive that type of email, but will continue to receive other types of emails. For example, a contact can choose to not receive event announcements and still receive all other emails from your organization.

Contacts cannot unsubscribe from receiving automatic system emails such as membership renewal reminders, event registration confirmations, invoices, or payment receipts. Administrators can prevent contacts from receiving these types of emails only by disabling the delivery of all emails to the contact.

Contacts can unsubscribe from different types of email within their profiles, or by clicking the Unsubscribe link in an email. Administrators can unsubscribe contacts from their contact records. These methods can also be used to subscribe contacts – to sign them up to receive certain types of emails.

Anti-spam regulations in Canada (and other jurisdictions) require "express consent" from a person before sending them a commercial email message.

Administrators can track the number of contacts who click the Unsubscribe link in email blasts, and search for contacts according to their email preferences – whether they are currently subscribed to receive each type of email.

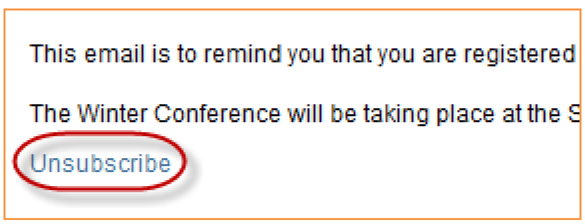
Using the Unsubscribe link in emails

Certain type of emails sent from your site will always include an **Unsubscribe** link in the email. An unsubscribe link will be automatically added to the following emails if they do not already include the {Unsubscribe_Url} macro:

- manual email blasts
- event announcements and reminders
- forum subscriptions

You can add the {Unsubscribe_Url} macro directly to your email, or enter text – e.g. "Click here to unsubscribe" – and link that text to the {Unsubscribe_Url} macro.

When opening these emails, the recipient should see the unsubscribe link at the bottom of the email:



Clicking the unsubscribe link will redirect the contact to a page on your site where they can unsubscribe:

You can customize this page by modifying the **Unsubscribe from emails** system page.

The **Unsubscribe** link will only unsubscribe the contact from one specific type of email, not from all types of email. For example, if a contact unsubscribes from a manual email (like a newsletter) then the contact will stop receiving all manual emails, but will continue to receive event announcements. To unsubscribe from both types of emails, contacts need to unsubscribe from each email type separately, or login and edit their email subscription settings.

Guest attendees receiving a mass email to event attendees will be unable to use the **Unsubscribe** link to unsubscribe from future emails since they have not been added to your contact database.

Administrators are not informed when someone unsubscribes. However, if you've enabled email tracking for an email blast, you can see – within the email log – the recipients who clicked the Unsubscribe link.

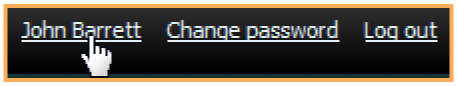
Unsubscribed contacts are automatically removed from the recipient list when sending email blasts.

Updating email preferences

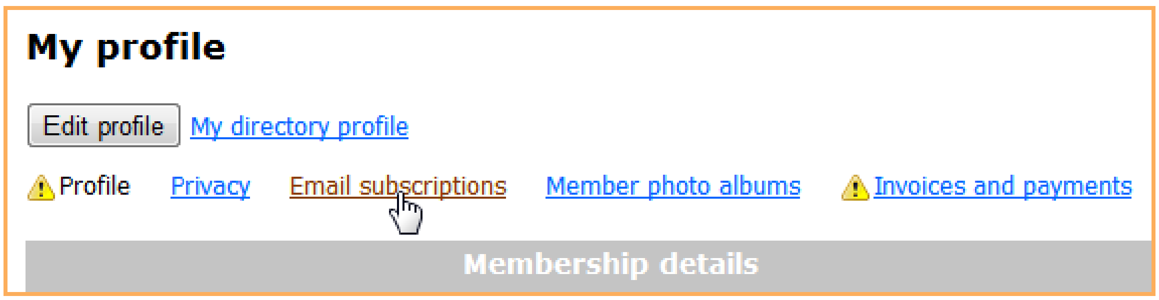
A contact can update their opt-in status, and unsubscribe from – or subscribe to – different types of email from their profile. To update email preferences, the contact follows these steps:

Read more/less

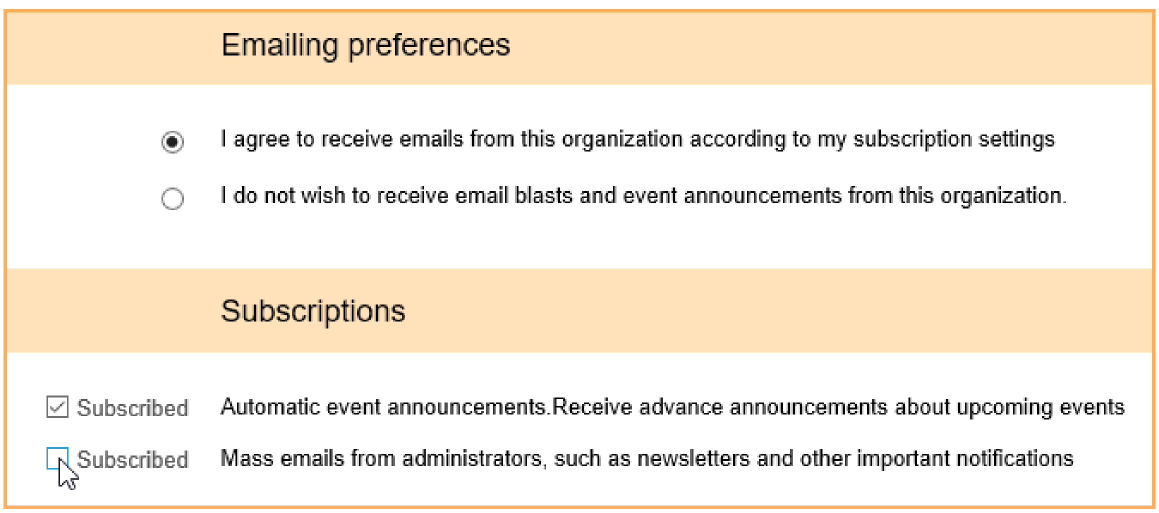
1. Logs into their Wild Apricot site.
2. Clicks the **View profile** link to jump to their member profile page. Depending on the website theme, their name may appear as the link.



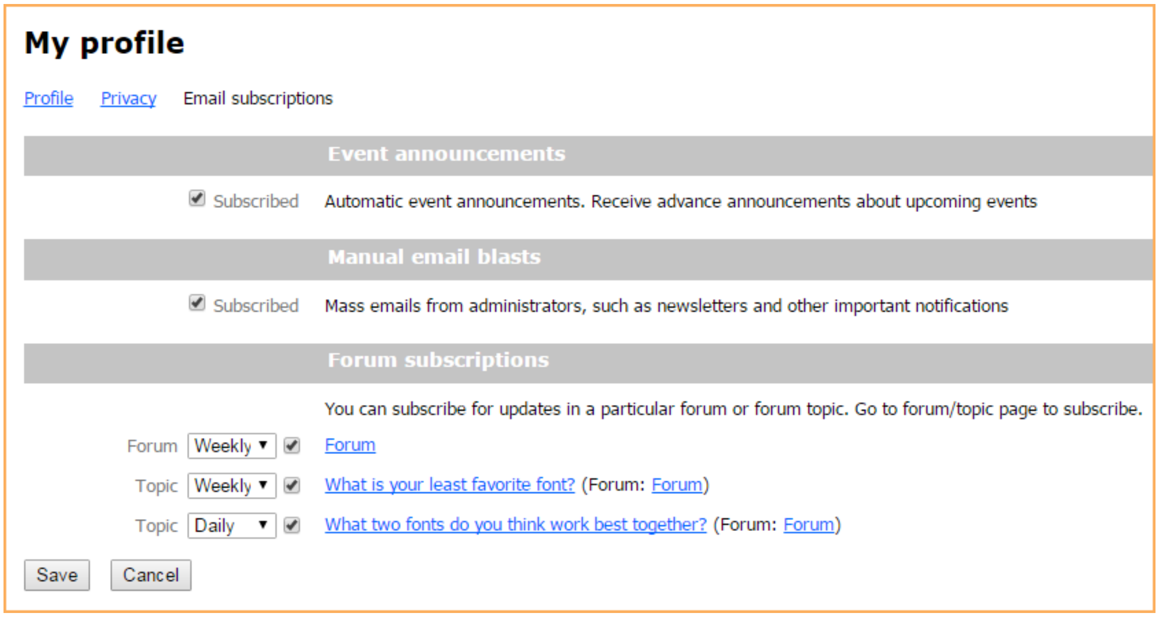
3. Clicks the **Email subscriptions** link.



4. Clicks the **Edit profile** button.
5. If the opt-in mechanism has been enabled for your site, contacts can update their opt-in status.



6. Whether the opt-in mechanism is enabled or not, contacts can choose the specific types of message they want to receive. They can separately choose whether they wish to receive:
   - **Event notifications** – automatic event emails such as event announcements (sent to people not yet registered) and event reminders (sent to registered attendees only)
   - **Manual email blasts** – all manual email blasts from administrators



7. In addition, contacts can control their forum subscriptions, if they have already subscribed to forum updates. Contacts can turn off forum updates and control how frequently they receive forum update notifications.

By default, every new contact will have event notifications and email blasts turned on.

> The email settings above do not affect other automatic emails such as membership renewal reminders and invoices/receipts. Only administrators can disable those emails (see below).

Changing a contact's email settings

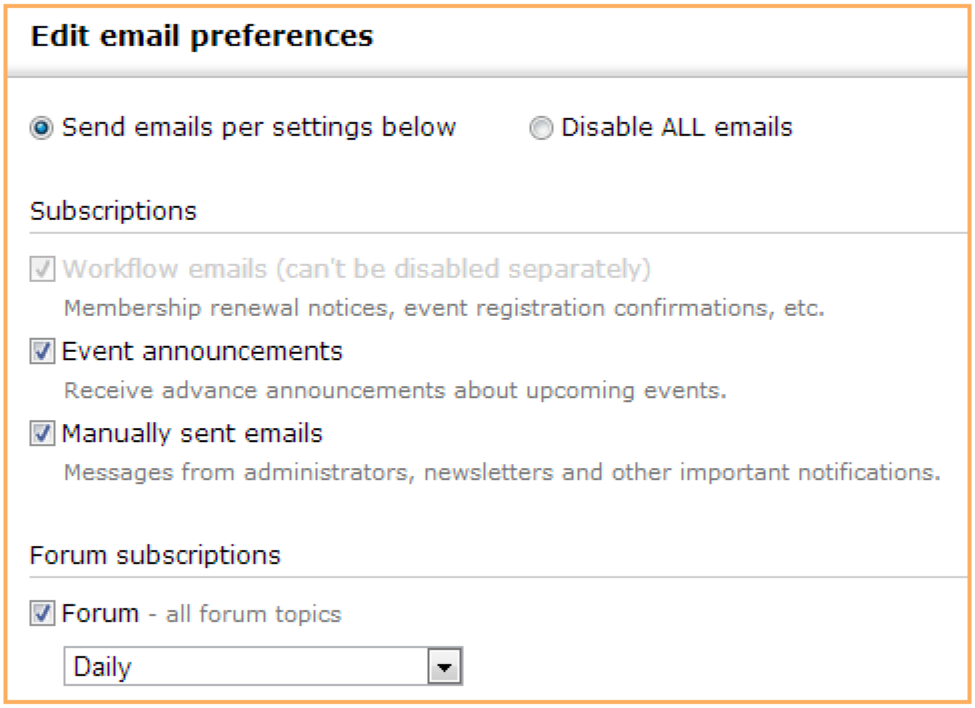
An administrator can change a contact's email preferences from their contact record. The administrator can change which types of email the contact is subscribed to, and change the frequency of forum update notifications. The administrator can also disable the delivery of all emails, including automatic system emails, to the contact.

To change a contact's email preferences, follow these steps:

Read more/less

1. Find the contact in the contact database and display the contact's details.
2. Click the **Email settings and log** link.
3. Click the **Edit** button beside **Email preferences**.
4. Check the type of emails you want the contact to receive. To disable all emails – including automatic system emails such as membership renewal reminders, event registration confirmations, invoices, and payment receipts – click the **Disable ALL emails** option. For forum subscriptions – which only appear if the contact has subscribed to a forum or forum topic from a forum page –

you can also change the frequency of the forum update notifications.



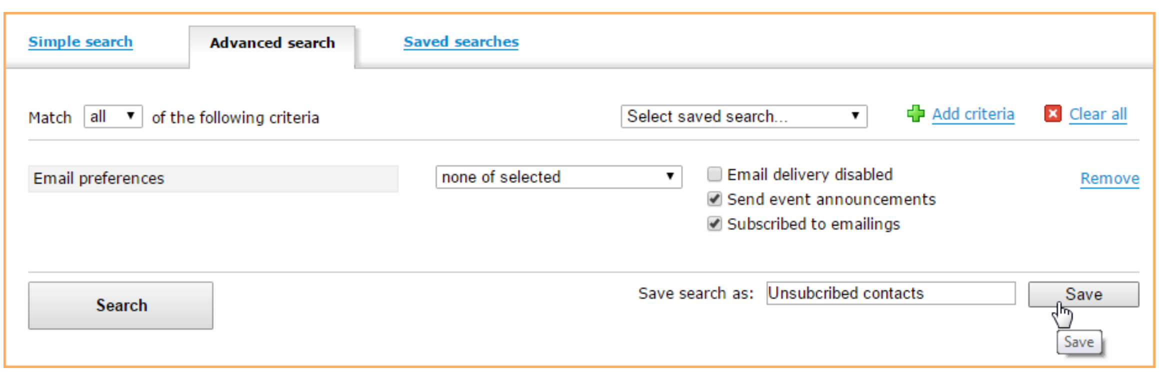
5. When you are finished, click **Save**.

Searching for unsubscribed members or contacts

To search for members or contacts who have unsubscribed from different types of mailings, follow these steps:

Read more/less

1. Go to the **Advanced search** tab for contacts or members.
2. Select **Email preferences** as your search criteria.
3. Click the **All of selected** dropdown and choose **None of the selected**.
4. Check **Send event announcements** to search for those who have unsubscribed from event announcements, and/or check **Sub scribed to emailings** to search for those who have unsubscribed from email blasts.
5. Click **Search** to perform the search, or enter a name for the search and click **Save** to save and perform the search.



On this page:

Expand all sections

See also:

- Email subscription form
- Member and contact - email settings
- Contact email settings and log

Providing an opt-in mechanism

Providing an opt-in mechanism

You can enable an opt-in mechanism so that contacts can expressly provide their consent to receive emails from your organization. This is a key component in complying with anti-spam legislation, particularly the Canadian Anti-Spam Law (CASL) . Penalties for non-compliance come into force on July 1, 2017, with a maximum penalty of $1 million for individuals and $10 million for businesses.

With the opt-in mechanism enabled, you can send consent request emails to your contacts, then track their opt-in status from each contact's **Email settings and log** tab.

In the future, following a later release, enabling the opt-in mechanism will also result in a checkbox requesting consent being added to all forms that prompt new contacts to enter an email address.

What does opting in mean?

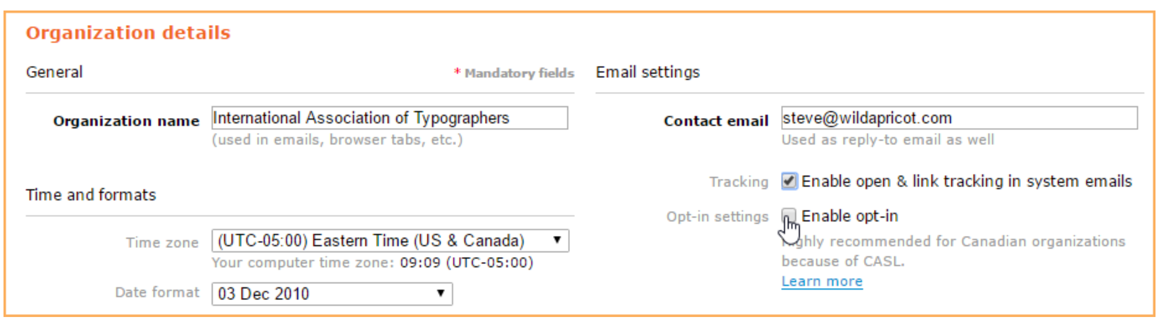
Opting in means the contact has given their consent to receive emails from your organization. They can still pick and choose the kind of messages they want to receive.

Opting out means the contact has specifically denied their consent to receive emails from your organization. They will still receive confirmation emails in response to specific actions on their part, such as membership renewal notices or event registration confirmations, but they will not receive event announcements and other email blasts.

Enabling the opt-in mechanism

To enable the opt-in mechanism, follow these steps:
Read more/less

1. Choose the **Organization** option under the **Dashboard** menu.
2. On the Organization details screen that appears, check the **Enable opt-in** option.

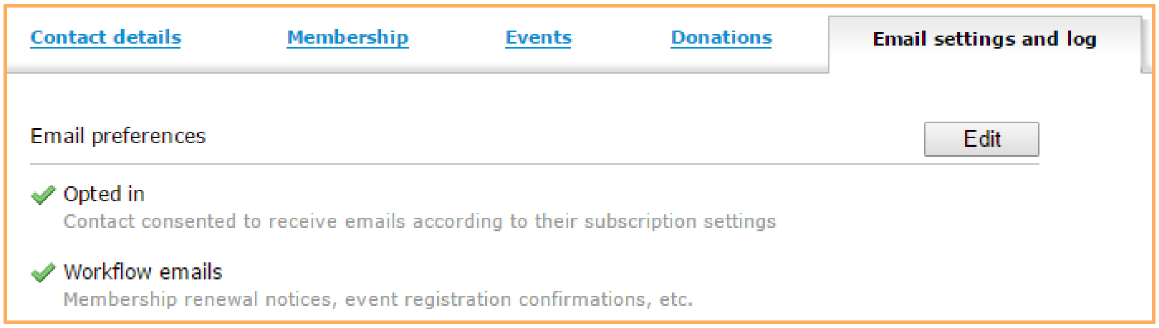


3. Click the **Save** button to save your changes.

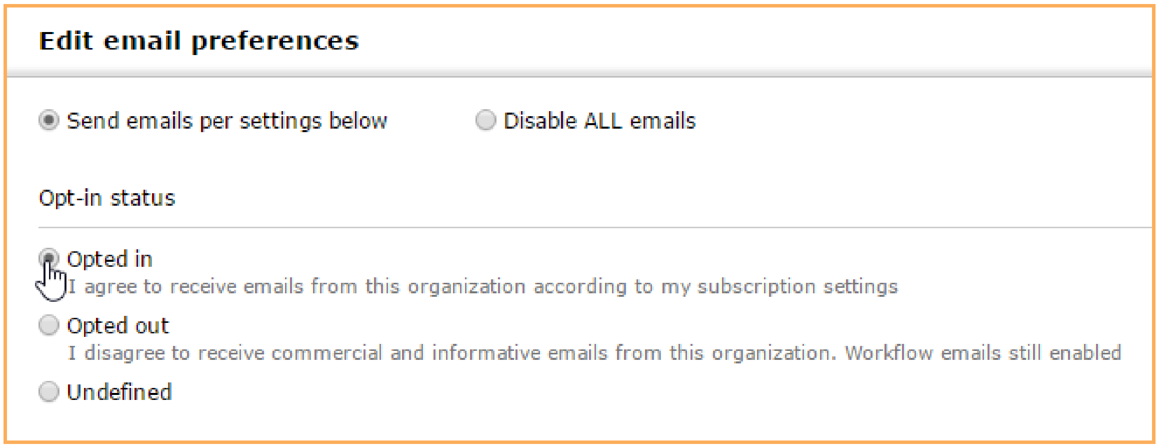
> If you disable the opt-in mechanism after previously enabling it, you cannot re-enable it without resetting your contact's previous consent choices to Undefined. A record of previous consent choices for your contacts can be obtained from Wild Apricot support.

Viewing and modifying the opt-in status

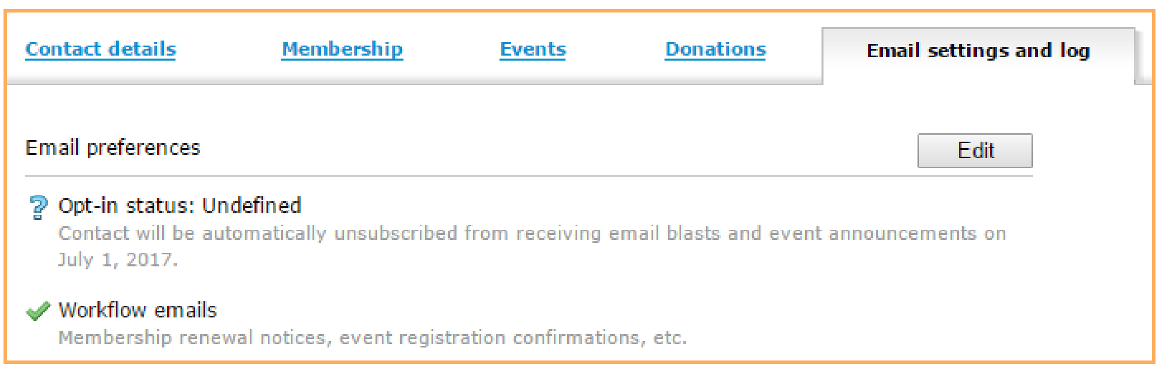
When you enable the opt-in mechanism, the opt-in status of each contact is added to the **Email settings and log** tab in their contact record.
Read more/less



When you modify the contact's email preferences, you can set the status to Opted in, Opted out, or Undefined.



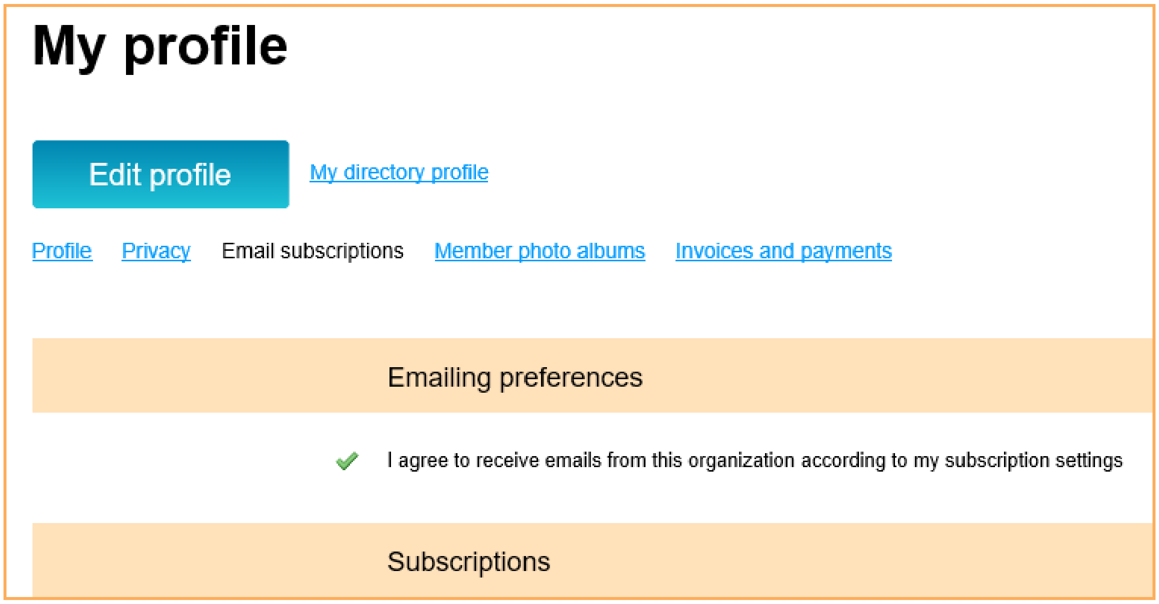
Initially, the status for all contacts will be set to **Undefined**, meaning that the contact hasn't chosen whether to opt in or opt out of receiving emails.



Updating the opt-in status by members

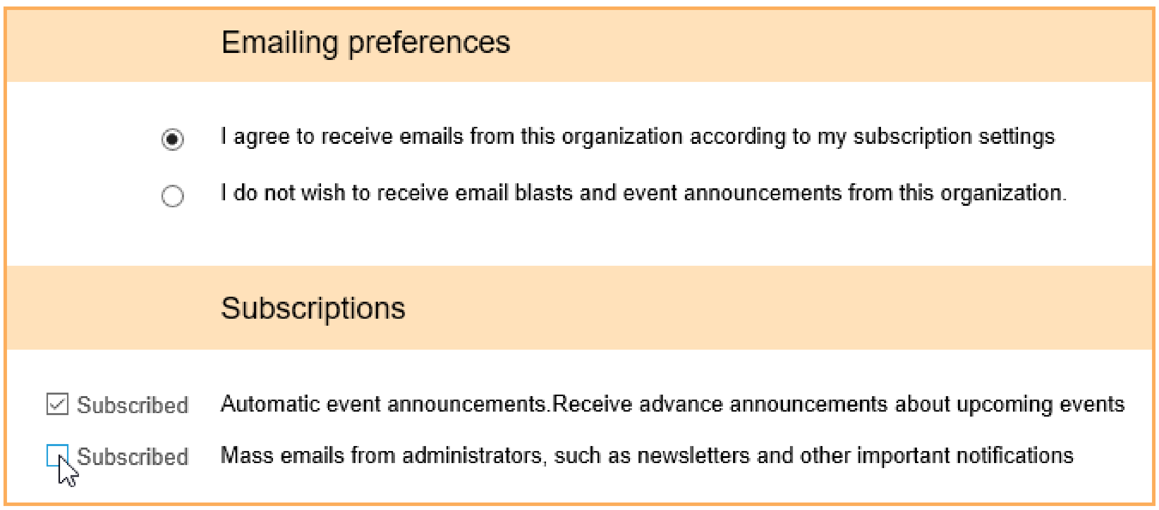
Members can update their opt-in status themselves from their member profile. The opt-in setting appears on the **Email subscriptions** tab.

Read more/less



To change the setting, the member clicks the **Edit profile** button and makes their choice.

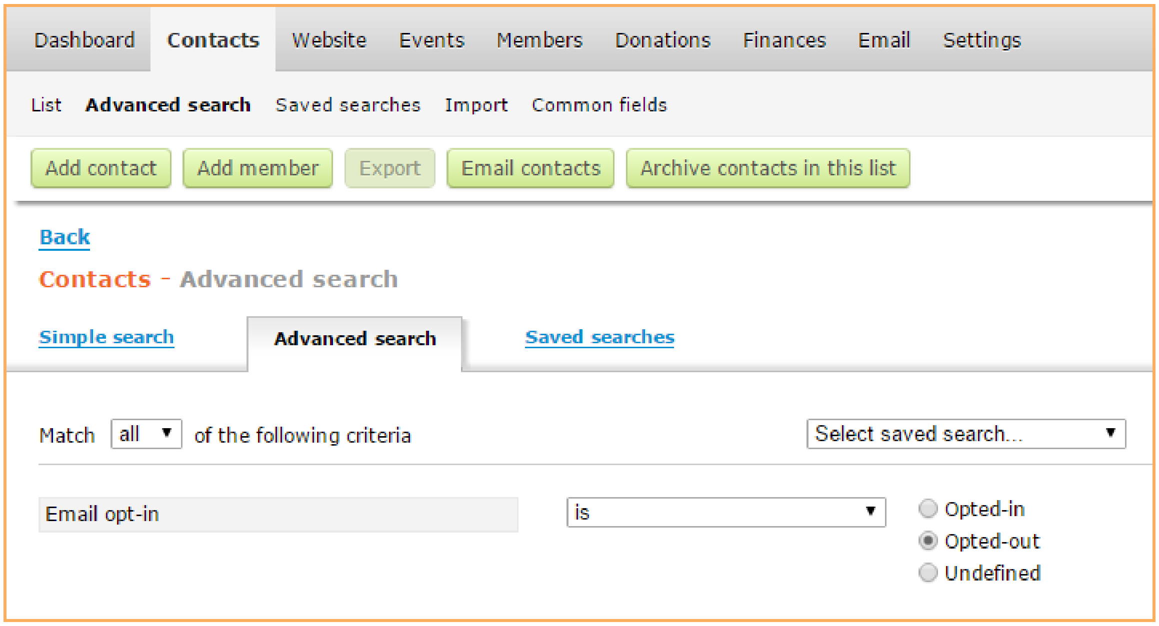
If a member agrees to receive emails from your organization, they can then choose the specific types of message they want to receive. They can separately choose whether they wish to receive event announcements and manual email blasts.



Searching for contacts by consent status

You can search for contacts by consent status from the **Advanced search** page within both the Contacts and Members modules. To search for contacts by consent status, add the **Email opt-in** search criteria.

Read more/less



You can search for contacts who have opted in, opted out, or haven't made a choice.

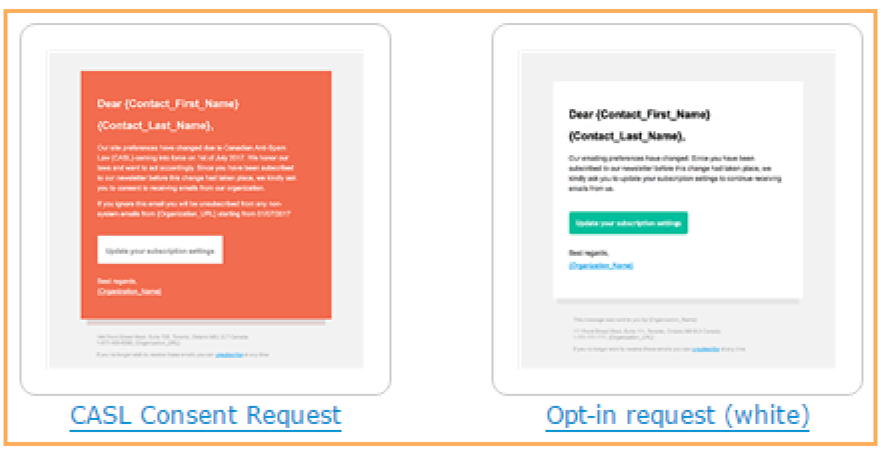
Sending a consent request email

You can send an email blast to contacts with an Undefined opt-in status, asking them to update their email preferences if they want to continue to receive messages from your organization.

Read more/less

Your email should include a link to the **{Member_Profile_Url}** macro that allows contacts to update their member profile.

Two new email templates have been added to help you communicate to your contacts about opting in: one that specifically addresses CASL, and one for generic opt-in requests.



Both email templates include the **{Member_Profile_Url}** macro.

You can use these templates as is, or duplicate and modify them.

On this page:

Expand all sections

See also:

- Complying with anti-spam regulations

Complying with anti-spam regulations

Complying with anti-spam regulations

Regulations exist in both the United States and Canada to regulate commercial email messaging and limit unsolicited messages, commonly called *spam*. Penalties for non-compliance are significant in both cases. These regulations – and how your Wild Apricot site can comply with them – are discussed below.

To help you comply with regulations that require express consent before sending an email to a contact, Wild Apricot allows you to enable an opt-in mechanism so that contacts can expressly provide their consent to receive emails from your organization.

CAN-SPAM Act (United States)

The CAN-SPAM Act of 2003 provides standards for sending commercial e-mail within the United Status, and is enforced by the Federal Trade Commission (FTC). Each separate email in violation of the CAN-SPAM Act is subject to penalties of up to $16,000.

The requirements of the CAN-SPAM Act as they apply to Wild Apricot sites include:

Requirements	How Wild Apricot sites can comply
Your “From” and “Reply-To” email addresses must accurately identify the person or business who initiated the message.	Check your: • **Reply to** contact for email blasts • Event organizer for event emails • Contact email for all other emails
The subject line must accurately reflect the content of the message.	Enter a straightforward summary of the message in the Subject line.
If an advertisement, the message must clearly identify itself as such.	Use the Subject line to clearly identify the message as a promotion, appeal, or recruitment drive. For example, if you are promoting an event, begin your subject with "Event promo: " or something similar. If you are soliciting for donations, start the subject with "Donor appeal: ". So you don't forget each time, you can customize the Subject lines in your email template(s).
Your message must include your valid physical postal address.	Add your postal address to your message. So you don't forget each time, add it to your email template(s).
Your message must include a clear explanation of how to opt out of receiving future emails from you.	If you do not include a link to the {Unsubscribe_Url} macro in your email, one will be automatically appended to the message.
You must honor a recipient’s opt-out request within 10 business days.	Unsubscribe requests submitted using the {Unsubscribe_Url} macro are processed immediately. Unsubscribed contacts are automatically removed from the recipient list when sending email blasts.

CASL (Canada)

The Canadian Anti-Spam Law (CASL) went into effect on 1 July 2014. This law applies to any organization that sends commercial electronic messages to recipients based in Canada. If you use Wild Apricot to send commercial or promotional emails to Canadian residents, then you need to comply with CASL.

Penalties for non-compliance come into force on July 1, 2017. The maximum penalty for violations is $1 million for individuals and $10 million for businesses.

Disclaimer
Please note this article is not a legal opinion. Here, we simply try to offer some ideas on how to comply with CASL to the best of our knowledge. We encourage you to consult a lawyer familiar with this issue.

What is a commercial electronic message?

A commercial electronic message is an email containing commercial or promotional information including marketing, sales, offers, solicitations, or similar messages.

What are CASL's requirements?

The law specifies 3 requirements for sending a commercial electronic message to an electronic address. You need:

- consent
- identification information, and
- an unsubscribe mechanism.

Types of consent

Before sending a commercial electronic message to a Canadian resident, you must obtain consent. You should also be able to prove how and when that consent was given should the need arise.There are two kinds of consent: express and implied.

Implied consent

- If you are a club, association or voluntary organization and the recipient is one of your members, you have implied consent, as long as the individual remains a member
- If someone submits an application, registers for an event, donates or subscribes to receive emails through your site then consent to receive emails from you is implied.
- However, this **implied consent is valid for 24 months** from the transaction date, after which you will need to obtain express consent.

Express consent

- Obtaining express consent requires a user to take a pro-active step to consent to receiving emails from you. It is our understanding that simply agreeing to your "terms of use" for example is not enough – they need to actually agree to receive emails from you.
- Your request for consent must clearly include:
  - Concise description of your purpose in obtaining consent
  - Description of messages you plan to send
  - Your name and contact information (physical mailing address and either phone, email or website URL)
  - A statement indicating they are free to unsubscribe at any time.

Obtaining express consent in Wild Apricot

To help you obtain express consent to send emails to your Canadian contacts, Wild Apricot is adding an opt-in mechanism. If you enable the opt-in mechanism, you can send consent request emails to your contacts, then track their opt-in status from each contact's **Email settings and log** tab.

In the future, enabling the opt-in mechanism will also result in a checkbox requesting consent being added to all forms that prompt new contacts to enter an email address.

Identifying the sender

A commercial email message must identify the person who sent it or, if sent by a third party, the person on whose behalf it was sent. The message must also include contact information for the sender. So you don't forget each time you send a mass email, you should add your contact information to your email template(s).

Providing an unsubscribe mechanism

The message must provide an easy method for the recipient to opt-out (unsubscribe) from receiving future emails. For manual email blasts, Wild Apricot automatically includes an {Unsubscribe_Url} macro in your email, if you haven't already entered one yourself. Unsubscribed contacts are automatically removed from the recipient list when sending email blasts.

See also:

- Canada’s law on spam and other electronic threats
- Frequently asked questions about CASL
- Frequently Asked Questions about Canada’s Anti-Spam Legislation
- http://fightspam.gc.ca/eic/site/030.nsf/eng/00288.html

Regulations in other jurisdictions

Jurisdiction	Regulations
Australia	Spam Act 2003
European Union	Article 13 of DIRECTIVE 2002/58/EC
United Kingdom	Privacy and Electronic Communications (EC Directive) Regulations

On this page:

See also:

- Providing an opt-in mechanism

Using email hosting services

Using email hosting services

Wild Apricot does not provide email hosting services or help you set up email accounts. There are, however, numerous email hosting services that you can use together with your Wild Apricot account. In this way, Wild Apricot takes care of your website (*www.<yourdomain.org>*) while your hosting services takes care of your email account (*<anything>@<yourdomain.org>*).

A free service is available for eligible non-profits from Google. As well, you can take a look at email hosting services offered by Rackspace, Exchange Online, GoDaddy, Network Solutions, Hover.com, Microsoft Office 365 – as well as many others. Your domain registrar might also offer email hosting services.

Verifying your domain with Google Apps

Google requires that you verify the ownership of your domain name before you can use it with Google Apps. There are two ways you can verify your Wild Apricot domain:

Create a TXT record

You create a TXT record using the admin panel available from your domain provider – the company you purchased your domain from – not Google or Wild Apricot. For instructions on doing this, see Verify domain ownership.

Add a meta-tag

You add a verification meta-tag provided by Google to your Wild Apricot site's home page. To do so, follow these steps:

1. Go to Site pages and select the home page within the list.

2. Click the **Edit** button towards the top of the screen.
3. In the **Meta-tags** section within the page settings on the left, add the meta-tag provided by Google in the **Raw Headers** box.

For more information, see Search engine optimization (SEO).

Modifying your SPF record

An SPF – Sender Policy Framework – record is an email validation system designed to prevent email spam by verifying the IP address of the sender. SPF records are set up in your domain management system as TXT records.

As part of setting up your Wild Apricot account to use a custom domain name, you create a SPF record for your domain that identifies Wild Apricot servers as being allowed to send emails on your behalf. If you are also using an email hosting service to handle emails from that domain, you must also include a reference to your email host. In addition to the *include statement* for Wild Apricot, you may need to add an *in clude* statement for your email host. For example, if your email host is Google Apps, you would publish the following TXT record in your DNS (Domain Naming System):

```
v=spf1 include:wildapricot.org include:_spf.google.com ~all
```

Contact your domain provider's support department for assistance with setting up your SPF record.

On this page:

See also:

- Custom domain setup

Adding to email whitelists

Adding to email whitelists

Many email clients use spam blockers to automatically reroute unwanted emails to a Junk or Spam folder. Unfortunately, many legitimate messages end up being flagged as junk or spam. To ensure that messages from you to your contacts or members end up in their inboxes, you should encourage them to add your email address to their safe senders list aka whitelist.

For instructions on adding email addresses to whitelists on different email clients, follow the appropriate instructions below.

AOL 9

1. Add the email address to your address book.

AOL 8

1. Open a message from the sender you want to add.
2. Click the **Add Address** icon on the right.
3. Verify that the information displayed is correct.
4. Click **Save**.

Apple Mail

1. Open a message from the sender you want to add.
2. Click the Flag icon and select **Mark as Not Junk**.

Earthlink

1. Go to your address book.

2. Click the **Add** button.
3. Enter the email address under **Internet Information**.

Gmail

1. Open a message from the sender you want to add.
2. Click **More Options** in the email header.
3. Click **Add Sender to Contact List**.

MSN Hotmail

1. Go to the **Options** page.
2. On the left side of the page, click **Mail** and then click **Junk E-Mail Protection**.
3. Click **Add Senders to Safe List**.
4. Enter the email address of the sender and then click **Add**.

Outlook 2010

1. On the Home tab, in the Delete group, click **Junk**, and then click **Junk E-mail Options**.
2. On the Safe Senders tab, select the **automatically add people I e-mail to the Safe Senders List** check box.

Outlook 2007, Outlook 2003, or Outlook Express

1. Go to Tools on the menu bar.
2. Select **Options** in the pull-down menu.
3. Under **Preferences**, select **Junk E-mail**.
4. Click on the **Safe Sender** tab.
5. Click the **Add** button.
6. Type the email address of the sender in the text box.

Yahoo! Mail

1. Within your Spam folder, select a message from the sender you want to add, then click the **Not Spam** option.

On this page:

Mobile support

Mobile support

Wild Apricot is committed to delivering a positive mobile experience for both site administrators and site visitors. Responsive website themes allow administrators to design mobile-friendly sites that automatically scale their contents to fit properly on different sized screens, allowing your members to perform self-service functions such as registering for events and paying invoices on the go from their mobile devices. Wild Apricot's mobile app – available for both iOS and Android devices – allows administrators to manage contacts and events from their phone or tablet.

Creating mobile-friendly sites

Using responsive themes

Wild Apricot offers a number of responsive website themes. Themes that are responsive will appear on the Themes screen with both desktop and mobile thumbnails.

Read more/less

A site designed using a responsive theme automatically adjusts its layout and appearance according to the width of the screen used to view it. Gadgets will be stacked within a single column and resized. Image sizes and font sizes will also be adjusted. A mobile version of the site menu will be displayed, with a limit of 3 levels in total (main menu plus 2 submenu levels). Only horizontal menus are available for responsive themes.

For best results using responsive themes, follow these guidelines:

- Center your images, including background images
- Do not use layers to absolutely position logos and other graphics
- Limit your site menu to 3 levels

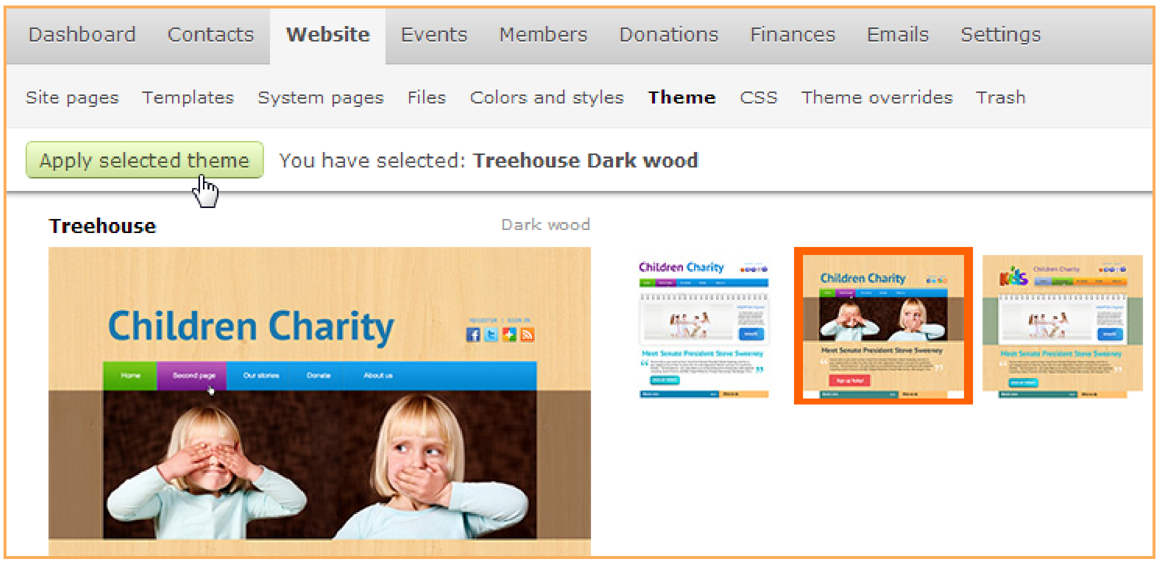
For more responsive design tips, see Designing responsive pages.

Switching to a responsive theme

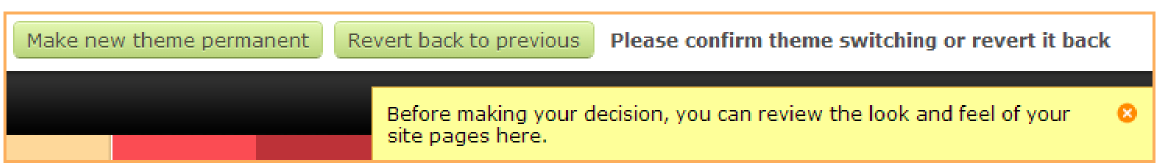
Making your existing Wild Apricot site responsive can be as simple as switching to a responsive website theme.
Read more/less

> When you switch to a different theme, permanent changes are made to your web pages. As well, a different set of master layouts and page templates becomes available as the basis for individual site pages. As a result, layouts and gadgets may change position within your pages. Also, all theme overrides and any customizations made on the Colors and styles screen will be discarded. Switching back to the previous theme may not restore your site to its previous appearance. You should consider asking Wild Apricot Support to create a clone of your current site so you can test your changes – though you'll have to apply your changes separately to your live site, since the clone site functions as a sandbox and cannot be copied in place of your live site.

To change your website theme, select the **Theme** option under the **Website** menu. Within the theme gallery that appears, click the theme you want to use then click the **Apply selected theme** button.



After you click **Apply selected theme**, you will be asked to confirm your selection before the change is applied. Then, you will be taken to a site page where the selected theme can be previewed. From here, you can make the change permanent or revert back to your previous website theme.



After switching to a different theme, you should review your entire site to make sure the new settings work well with your content, and make whatever adjustments are required. One or more pages may be added to your site to illustrate various theme-specific content and styles.

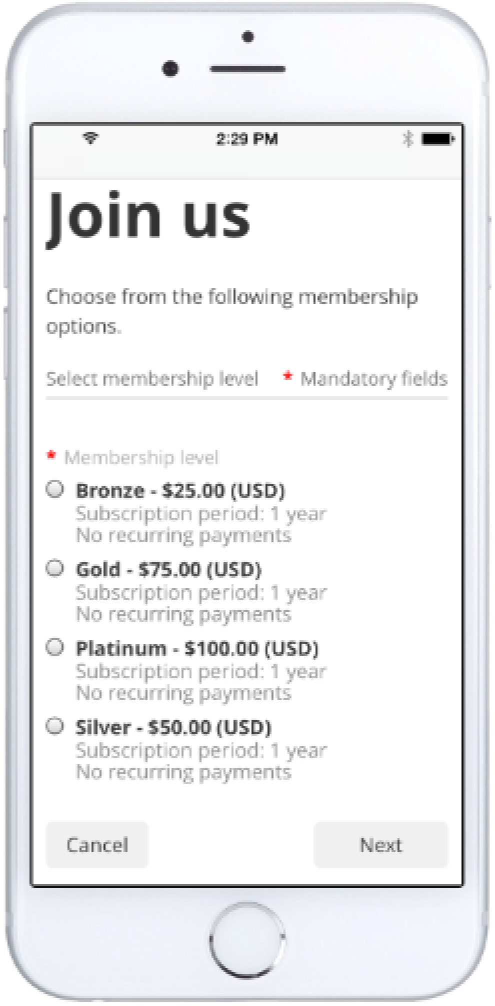
Mobile self-service

Instead of creating a mobile app for Wild Apricot members, we chose to focus on designing responsive website themes so you can design a mobile-friendly site for your members. With a mobile-friendly site in place, your members can perform self-service functions from their phone or tablet without zooming or excessive scrolling.

Applying for membership

Applying for membership from a device on a responsive site is the same as on a desktop computer. If there are multiple membership levels, the applicant begins by selecting the appropriate level.

Read more/less

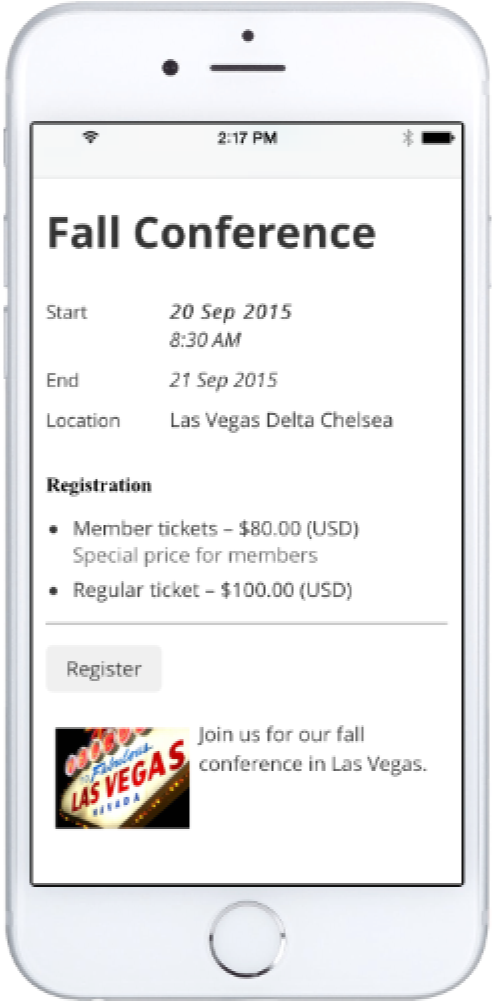


After the applicant enters their contact details and submits the application, the new record is automatically added into your database and a number of automatic actions take place. Among other actions, an application invoice is generated, and password and application initiation emails are sent. For more information, see Membership application form.

Registering for events

From a responsive Wild Apricot site, members and non-members can view, register, and pay for events using their smartphones or tablets.

Read more/less



First, they choose the appropriate registration type, then complete the registration form, choosing any optional extras and registering guests (if enabled).

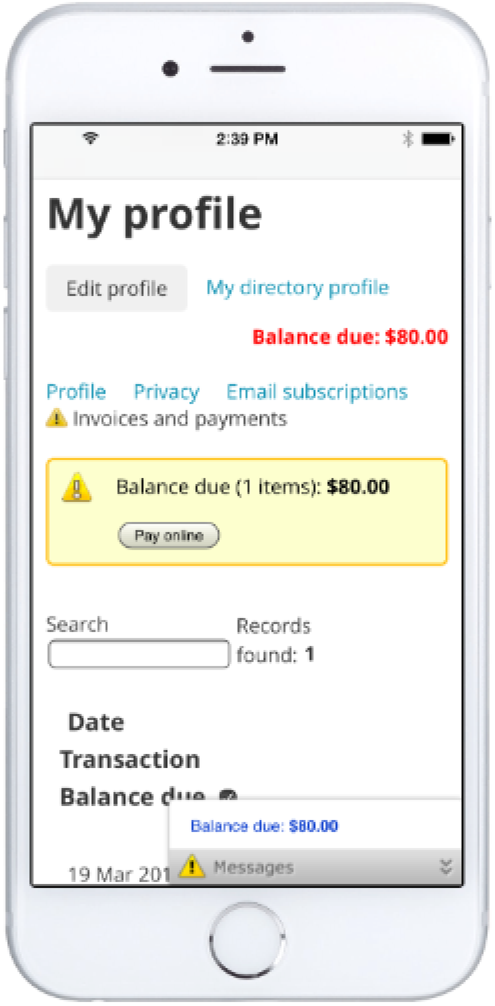
Once they submit the form, an event record is created and they will be prompted to confirm the transaction. After clicking the **Confirm** button, the registrant is taken to the **Invoices and payment** tab to complete the payment. If the registrant is not currently in your database, a new contact record will be added and an email will be automatically sent to them with their password and login information.

For more information, see Self-service online event registration process.

Paying invoices

From the Invoices and payments screen on their member profile, members can view and pay outstanding invoices from their mobile device.

Read more/less



Invoices with open balances (unpaid or partially paid) will be shown at the top of the screen.

Members can select one or more outstanding invoices then click the **Pay online** button to make the payment. They can also select and apply any unused account credits to the net amount.

For more information, see View account history and pay invoices.

Changing settings

From their member profile, members can perform other self-service functions, including:

- Modifying their profile
- Changing their email preferences
- Renewing or changing their membership

Mobile app for admins

The Wild Apricot app – available for iOS and Android devices – allows Wild Apricot account administrators, or administrators with both membership and event access rights, to perform a number of administrative functions, such as:

Read more/less

- add or check in event attendees
- add or modify event registrations
- delete an event registration
- add or modify members and other contacts
- search for contacts
- suspend a member
- archive a contact

- record manual payments

The initial version of the Wild Apricot mobile app does **not** allow you to:

- create or modify saved searches
- view invoice or payment details
- delete invoices or payments
- create events
- modify event details
- add, remove, or modify separate guest registrations
- create or modify member groups
- send emails
- set up website pages
- accept online credit card payments

For the full range of Wild Apricot functionality, including the ability to design site pages and set up events, administrators can log into their Wild Apricot account from a browser. The browser version of Wild Apricot can be accessed from mobile devices, but not all functions are supported. For example, you can add contacts, manage events, and manage invoices. You cannot, however, modify site pages or compose emails.

For more information, see Wild Apricot mobile app .

On this page:

Expand all sections

Mobile access

Mobile access to Wild Apricot

For visitors

Sites created using Wild Apricot's responsive website themes are fully responsive. They automatically scale their contents to fit properly on different sized screens, including mobile devices.

Older themes are not responsive but in some cases display well on mobile devices. Visitors to your site should be able to perform self-service functions such as applying for membership and registering for events on their mobile devices, but the screens involved will not be scaled for the mobile experience. As a result, visitors may have to scroll and zoom more than they are used to doing.

Some important caveats:

- If your Wild Apricot site uses advanced customizations such as CSS customization, Theme overrides, or inserting HTML or JavaScript, you may need to review and adjust its appearance and/or behavior for display on mobile platforms.
- The content placed on each page can affect its appearance on mobile devices since formatting codes, tables, and other elements can be handled differently by mobile browsers.
- iOS devices – including iPads – do not provide native support for Flash, so avoid embedding any functionality that uses Flash

For administrators

Administrators can use the Wild Apricot mobile app to add or modify event registrations, check in attendees, modify contact information, and record manual payments.

The browser version of Wild Apricot can be accessed from mobile devices, but not all functions are supported. For example, you can add contacts, manage events, and manage invoices. You cannot, however, modify site pages or compose emails.

Wild Apricot is committed to providing better mobile support for administrators in the future.

Composing blog and forum posts

Both visitors and administrators can use the content editor *in public view* to compose blog posts and forum topics. The content editor is supported for this purpose on devices using iOS7 (and higher) on both Safari and Chrome browsers, and on devices using Android 4 (and higher) on Chrome browsers.

On this page:

- For visitors
- For administrators
- Composing blog and forum posts

See also:

- Browser compatibility
- Designing responsive pages

Designing responsive pages

Designing responsive pages

A responsive – or mobile-friendly – web page adjusts its layout and appearance according to the size of the screen used to view it. Responsive behavior is becoming increasingly important because of the proliferation of mobile and handheld devices. Without responsive behavior, a page that displays well on a laptop might require excessive scrolling on a mobile phone.

Wild Apricot's newest theme sets – Bookshelf, Building Blocks, Firma, Homestead, Kaleidoscope, Showcase, Skyline, Terra, Tinted Tiles, and Whiteboard – are fully responsive. Themes that are responsive will appear on the Themes screen with both desktop and mobile thumbnails.

Sites that use responsive themes automatically adapt their contents to fit properly on different sized screens, including mobile devices. You can, however, disable the responsive behavior of these themes using theme overrides.

With responsiveness enabled, a number of adjustments are made to better display pages within smaller screen sizes. These adjustments include the following:

- Gadgets will be stacked within a single column
- Gadgets will be resized to match the device's screen width

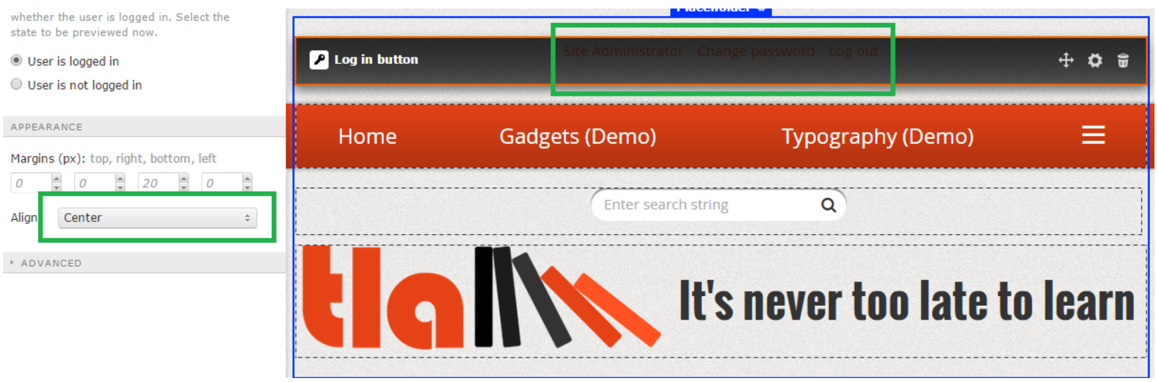
- Column widths will be adjusted
- Image sizes will be adjusted
- Font sizes for text styles will be adjusted
- A mobile version of the site menu will be displayed, with a limit of 3 levels in total (main menu plus 2 submenu levels

Responsive design tips

Here are some design considerations you should keep in mind to improve the responsiveness of your Wild Apricot site on mobile devices.

Headers

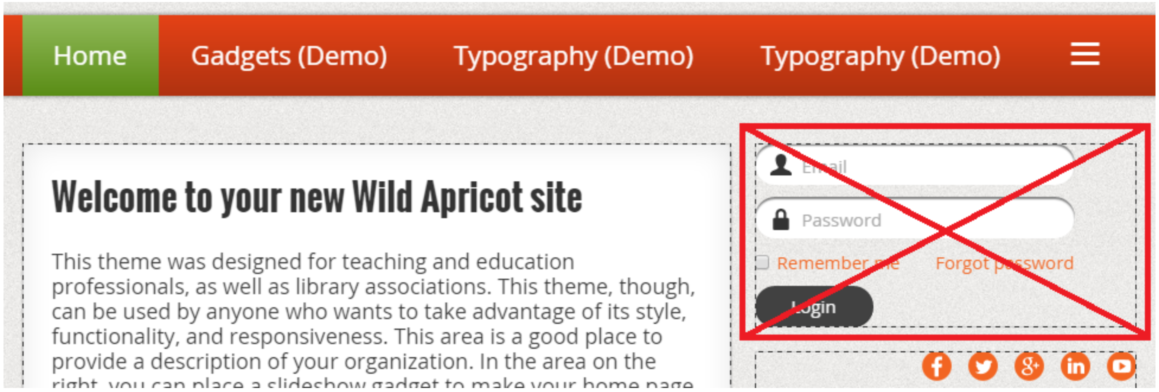
- Avoid complex layouts within your header area (the top placeholder within your page template).
- Place your menu and login gadget at the top of the page and in a single column – placing it in the top placeholder will do the trick.
- If you have a choice, choose a horizontal menu gadget rather than a vertical one.
- If you want a login gadget to appear centered on a mobile device, you have to set the alignment option that way for the desktop version as well.



- When placing your logo and association name, combine them in a single content gadget.

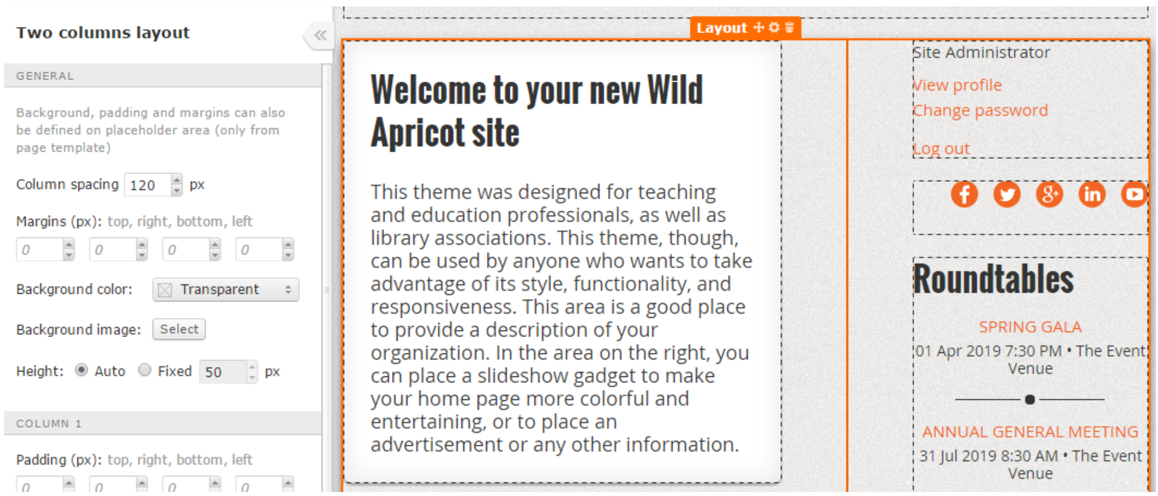
Layouts

- Avoid placing important content – such as login boxes – in a right sidebar of a multi-column layout. Because of the order in which multi-column content is stacked on smaller screens, gadgets within a right sidebar will end up halfway down the page on a mobile device.



Instead, place important gadgets in the left column, or in a single-column layout.

- Use column spacing rather than padding and margins to control the positioning of content within a layout. Padding and margin settings are applied to the mobile version, while column spacing is not.



This allows you to space out elements on your desktop page, while keeping your mobile site looking compact.

- Do not specify a fixed height for multi-column layouts.

Images

- If you insert your image as the background for a placeholder, layout, or gadget, the image will not scale when the screen width changes. If you can't avoid displaying a background image that's wider than a mobile screen, you can choose to center or left align the image, depending on where the critical portion of the image appears.
- If you want an image to scale according to the screen width, insert it into a content gadget, and optionally, position the content gadget within a layout.
- If you've placed an image in a content gadget along with text, whatever appears on the left will be stacked first on a mobile device, and other content will appear beneath. For example, content that appears like this on a desktop computer:

...would look like this on a mobile device:

- If you want content to appear on the same line, insert them into different columns within a table.

Tables in Wild Apricot are not responsive. The content within each column will scale but will remain on the same line.

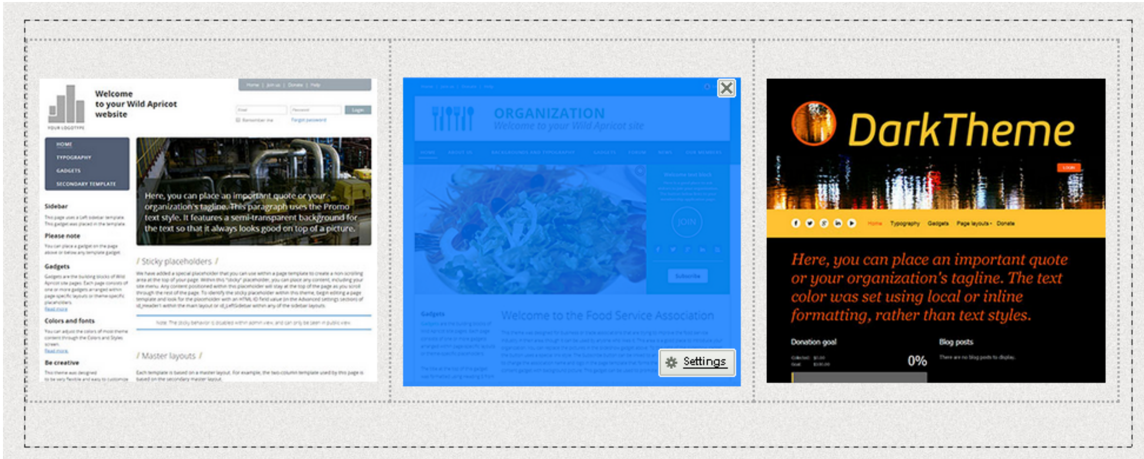
- You should avoid large graphics, and resize graphics to the size you want to display them at before adding them to a page

Text

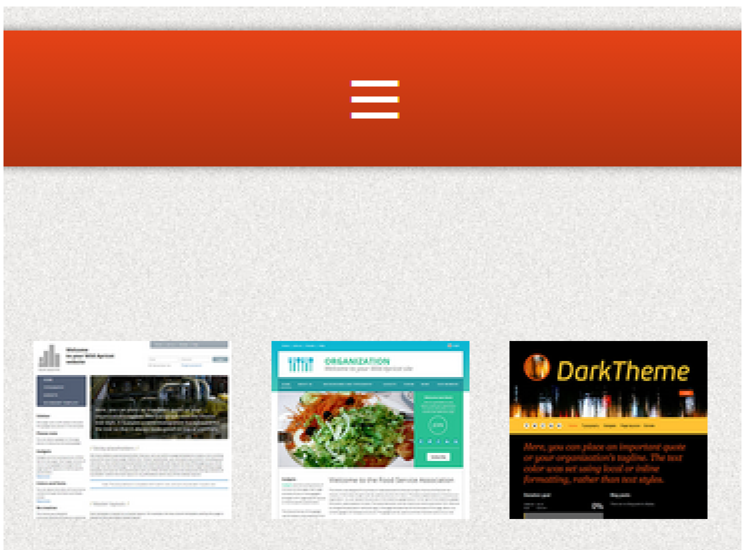
- Use paragraph styles instead of setting font sizes manually. Text with manually set font sizes will not scale on mobile devices.

Tables

- Wild Apricot's tables are unresponsive, meaning that content displayed in a table is not stacked. If you want multiple elements to be displayed on the same line, add them to different columns within a table. For example, if you add images to different columns like this:



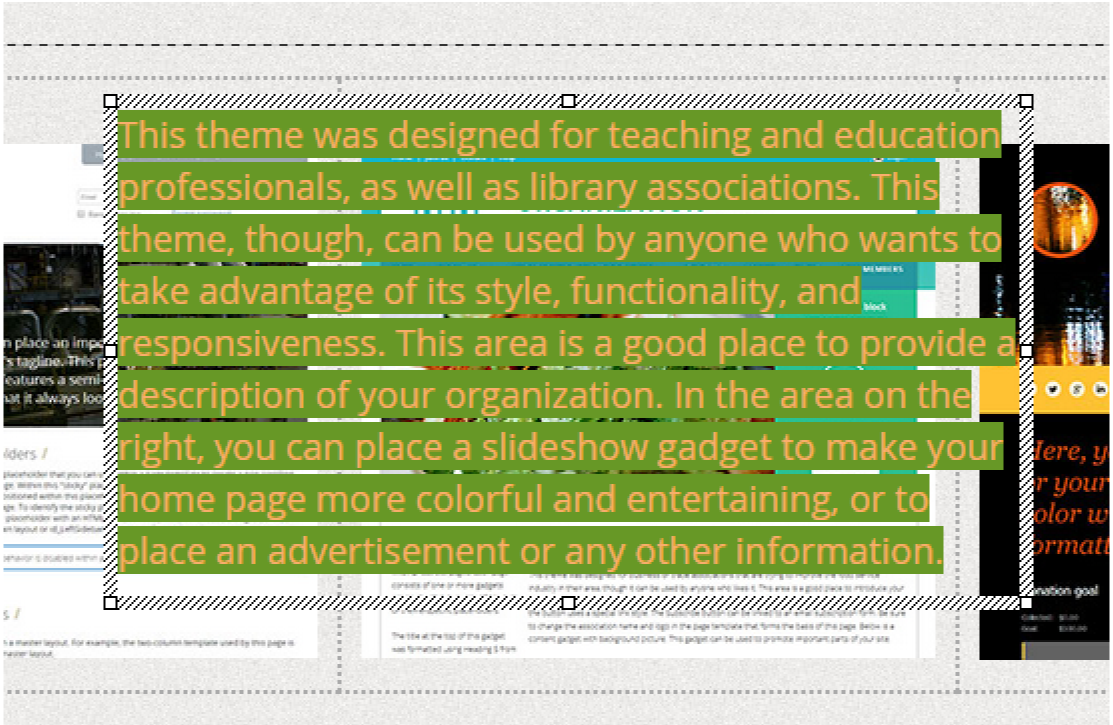
...the pictures will scale on a mobile device, but remain on the same line.



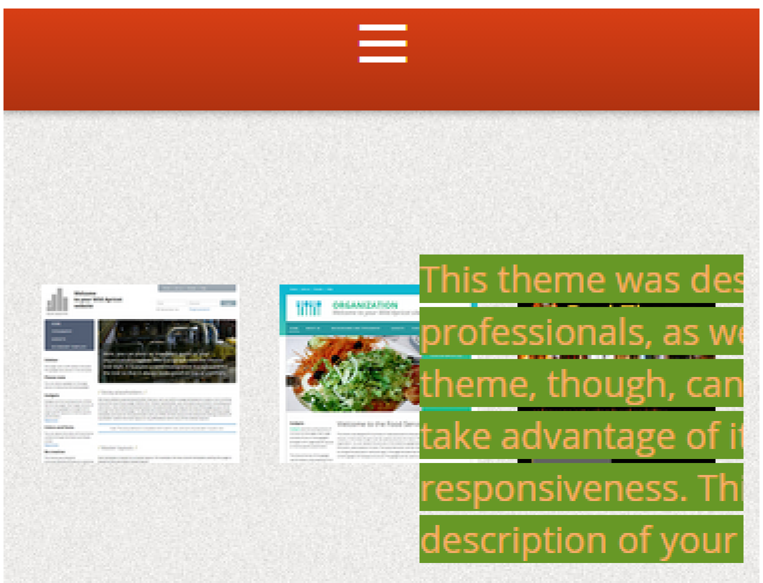
⚠ Using an unresponsive element like a table to display responsive elements can be a bit tricky, so be sure to test the results on a mobile device.

Layers

- You can use layers to precisely position content within a page. For example, you might want to position text over an image.



Unfortunately, however, absolutely positioned content is not responsive. The mobile browser will maintain the absolute position relative to the left margin, with a portion of the element cut off by the edge of the screen.



If you need to position text over a graphic, consider placing the text in a content gadget and insert the graphic as the content gadget's background image.

To properly use layers with responsive design, try to keep in mind:

- The width of an absolutely positioned element with its padding from left edge of the site must not exceed 320 pixels.
- Keep your absolute positioned elements close to the left edge of the screen. You can p lace the layer into a left sidebar or column (with 25% width) so that it appears the same on both desktop and mobile versions of your site.
- In most cases, you can design your element without layers. Try to use gadget margins, padding, and backgrounds to position your element.

Margins and padding

For most gadgets, you can use margins and padding to control the positioning of gadgets and their content. However, you must remember that margins and padding are applied to both the desktop and mobile versions of your site. Their values are not reduced or adjusted in any way.

You should therefore refrain from applying large values to either setting. A padding of 60 pixels before or after a heading might give your desktop version a nice airy look, but on a mobile device, the result will be just a lot of empty space. You'll need to play with margin and padding values to achieve an optimal balance.

Other

- Limit the number of top-level menu options
- Limit the number of graphics on a page
- Avoid large graphics
- Resize graphics to the size you want to display them at before adding them to a page
- Limit overall page content
- Do not use Flash content
- Test any third-party plugins on mobile devices

Testing whether your site is mobile friendly

Google now offers an free online tool to test whether your site is mobile friendly.

Disabling responsiveness

To disable responsive behavior within responsive themes, follow these steps:

1. Enable theme overrides (if you have not done so already).
2. Click the link to download the theme files.
3. Unzip the theme files to a location of your choice on your computer or network.
4. For Bookshelf, Firma, Showcase, Skyline, Terra, and Whiteboard themes, open the **basic.responsive.grid.less** file from the **Styles** f older using a text editor. For Building Blocks, Fiesta, Homestead, Kaleidoscope, and Tinted Tiles themes, open the **layout.less** file from the **Styles** folder.
5. For Bookshelf, Fiesta, and Whiteboard themes, replace the following lines...

```
@state2-minwidth: 600px;
@state2-maxwidth: 959px;

@state3-maxwidth: 616px;
```

   with...

```
@state2-minwidth: 0px;
@state2-maxwidth: 0px;

@state3-maxwidth: 0px;
```

   For Firma, Showcase, Skyline, and Terra themes, replace the following lines...

```
@state2-minwidth: 600px;
@state2-maxwidth: 959px;

@state3-minwidth: 320px;
@state3-maxwidth: 616px;
```

   with...

```
@state2-minwidth: 0px;
@state2-maxwidth: 0px;

@state3-minwidth: 0px;
@state3-maxwidth: 0px
```

For Homestead themes, replace the following lines...

```
@state2-minwidth: 600px;
@state2-maxwidth: 959px;
@state3-maxwidth: 616px;
```

with...

```
@state2-minwidth: 0px;
@state2-maxwidth: 0px;
@state3-maxwidth: 0px;
```

and...

```
.zoneInner, .zoneWrap
{
 max-width: 960px;
 margin: 0 auto;
 width: 100%;
}
```

with...

```
.zoneInner, .zoneWrap
{
 margin: 0 auto;
 width: 960px;
}
```

For Building Blocks, Kaleidoscope, and Tinted Tiles themes, replace the following lines...

```
@Device-M-MaxWidth: 991px; /* 768 - 991 */
@Container-M-MaxWidth: 970px;

@Device-S-MaxWidth: 767px; /* 480 - 767 */
@Container-S-MaxWidth: 750px;

@Device-XS-MaxWidth: 479px; /* 320 - 479 */
```

with...

```
@Device-M-MaxWidth: 0px; /* 768 - 991 */
@Container-M-MaxWidth: 970px;

@Device-S-MaxWidth: 0px; /* 480 - 767 */
@Container-S-MaxWidth: 750px;

@Device-XS-MaxWidth: 0px; /* 320 - 479 */

body { min-width: 1230px; }
```

6. Upload the modified file to the **Styles** theme folder on your site via File management or WebDAV.
7. Click the **Rebuild theme** button on the **Theme overrides** screen.

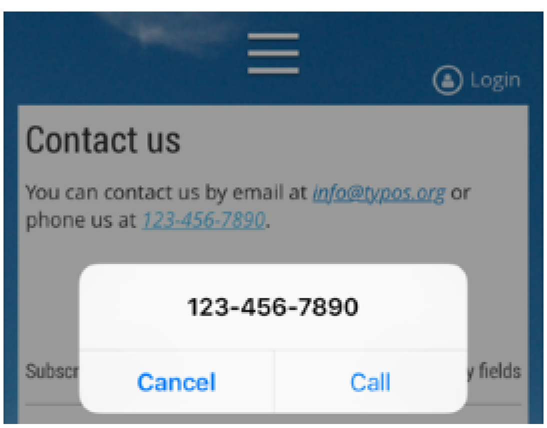
The site will now appear the same regardless of device size.

On this page:

Disabling the conversion of numbers into links on mobile browsers

Disabling the conversion of numbers into links on mobile browsers

On some mobile browsers, any string of digits that looks like a phone number is automatically converted to a link.



This can be a problem if the font color of the automatic link matches your background – thereby rendering the number invisible – or if your site page includes a string of digits that is not a phone number, such as an IP address.

To prevent mobile browsers from automatically converting numbers into links, add the following meta-tag to the **Raw headers** section:

```
<meta name="format-detection" content="telephone=no">
```

You can add this tag to a single site page or to your entire site. If you add it to the **Raw headers** section for the entire site, make sure you click the **Reset all pages to use this** button. For instructions on adding meta-tags to individual pages or your entire site, see Defining meta-tags.

After disabling the automatic conversion of numbers to links, you can still format a phone number as a link by going into the HTML and manually entering the link as follows:

```
<a href="tel:123-456-7890">123-456-7890</a>
```

Clicking the resulting link will display a prompt to call the number (in this example, 123-456-7890).

If you want the link to initiate a text message instead of a phone call, enter *sms:* in place of *tel:* in the code above.

Wild Apricot mobile app - iOS

Wild Apricot mobile app - iOS

Click/tap for complete page map

Quick overview

Wild Apricot is software that helps associations, nonprofits, clubs, and other member-based organizations automate and simplify event, member, and website management.

After setting up a Wild Apricot account, you can use the Wild Apricot mobile app on iOS devices to:

- add, modify, or delete an event
- add or check in event attendees
- add or modify event registrations
- delete an event registration
- add or modify members and other contacts
- search for contacts
- suspend a member
- archive a contact
- record manual payments

The current version of the Wild Apricot mobile app does **not** allow you to:

- create or modify saved searches
- view invoice or payment details
- delete invoices or payments
- customize registration forms
- set up event emails
- add new event tags
- add, remove, or modify separate guest registrations
- create or modify member groups
- send emails
- set up website pages

For the full range of Wild Apricot functionality, including the ability to design your website and set up events, you log into your Wild Apricot account from a browser.

SHOW ME (2:48)

Download the app

To download the Wild Apricot iOS app for administrators, tap on the image below:

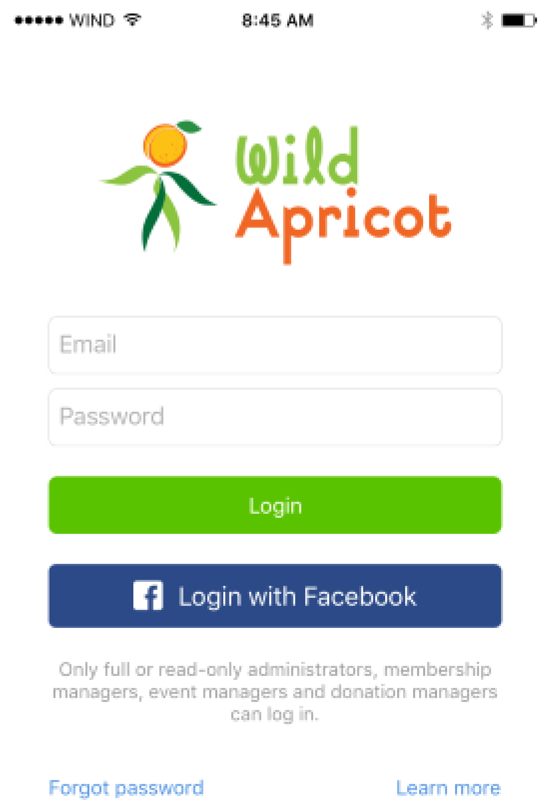
The app is designed for iPhones, but iPad users can still download and use it.

return to top

Logging in

Only full or read-only administrators, membership managers, event managers, or donation managers can log into the Wild Apricot app. After logging in, the options available to them will depend on their administrator permissions. For example, a membership manager will not see the Events tab.

You can log into your Wild Apricot account using the email address associated with your Wild Apricot account, or using your Facebook credentials – assuming you are using the same email address for a Wild Apricot administrator account.



If you are already logged into Facebook using the email address associated with your Wild Apricot site, tapping the **Log in with Facebook** button will automatically log you into your Wild Apricot account.

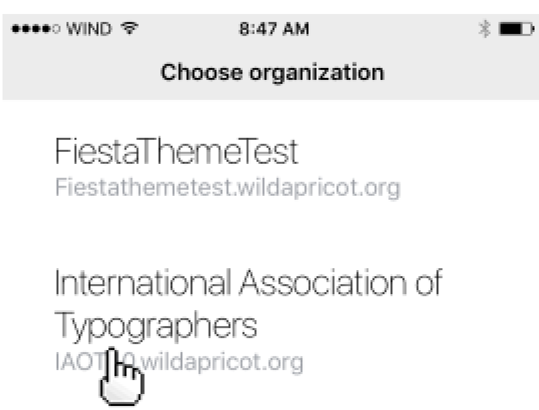
When logging using your email address, enter your email address and password, then tap the **Log in** button.

Currently, you cannot restore your password from the Wild Apricot app. If you do not remember your password, go to the Login screen on the browser version of your Wild Apricot account and click the **Forgot password** link next to the **Login** button. On the page that appears, you can enter your email address to receive a reset password link via email.

The first time you log into a Wild Apricot account, you will be required to accept Wild Apricot's terms of use before proceeding.

If you're not familiar with what the Wild Apricot mobile app can do, tap **Learn more** from the Login screen.

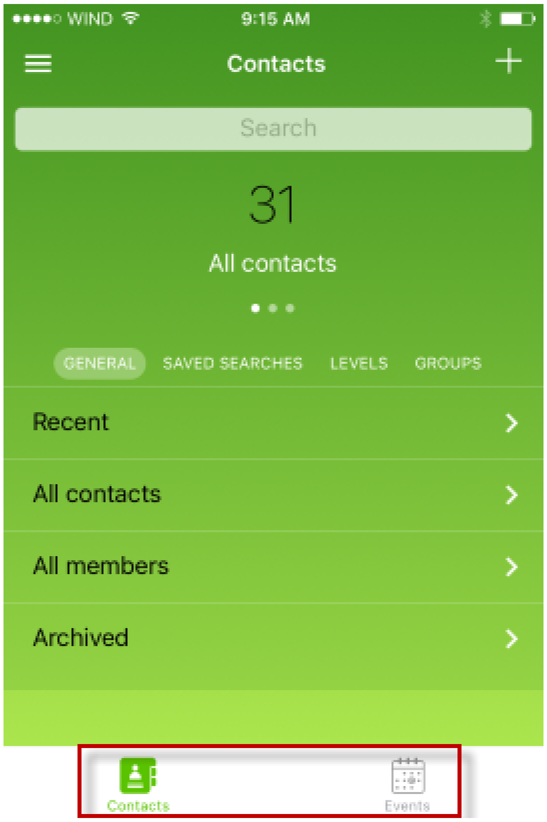
If there are multiple Wild Apricot accounts associated with your email address and password, you will be asked – after logging in – to choose the organization you want to manage at the moment.



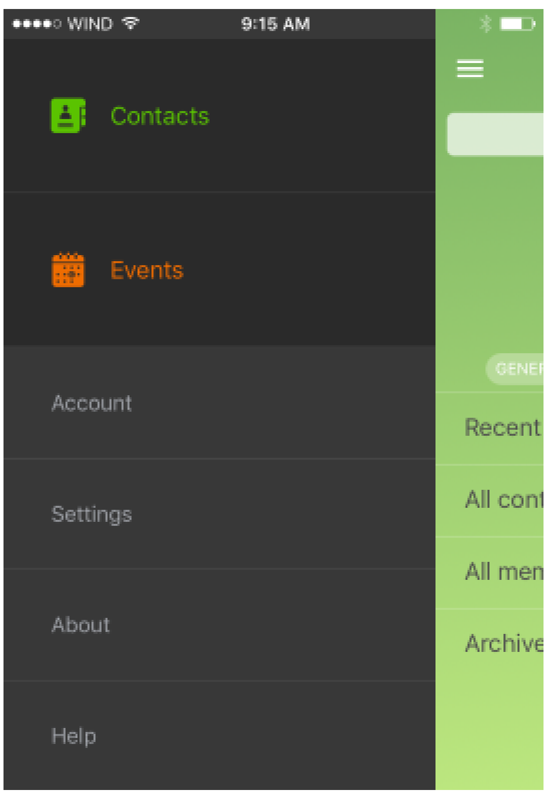
return to top

Navigating the app

The Wild Apricot app consists of a number of modules: Contacts, Events, Account, and Help. To jump between the Contacts and Events modules, tap the module name at the bottom of the screen.



To access any of these modules, swipe from left to right and chose from the options that appear.



return to top

Contacts module

Within the Contacts module, you view and manage members and other contacts.

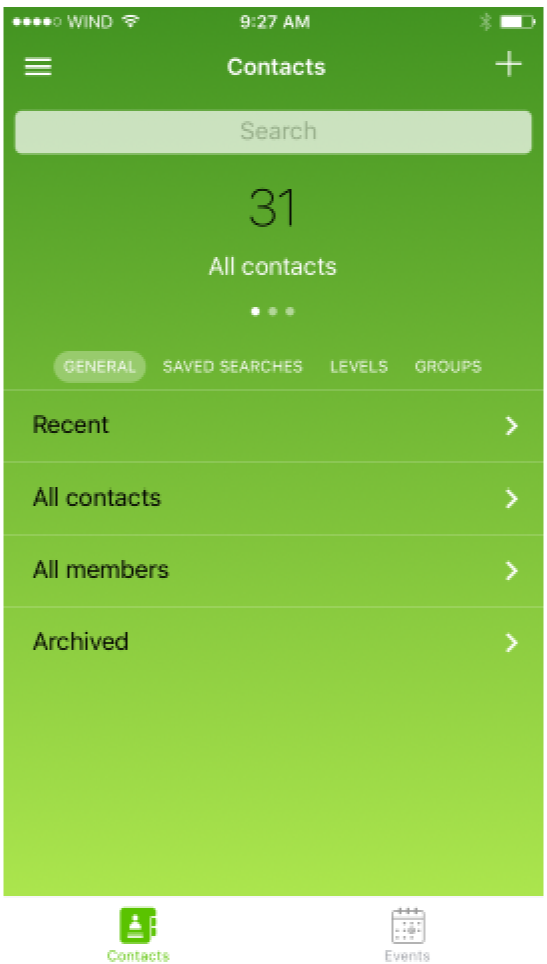
What can't you do with contacts?

- You cannot create or modify member groups
- You cannot perform advanced searches
- You cannot modify previously saved searches
- You cannot view invoice or payment details
- You cannot delete invoices or payments
- You cannot accept online credit card payments

To jump to the Contacts module, tap **Contacts** at the bottom of the screen.

Viewing contacts

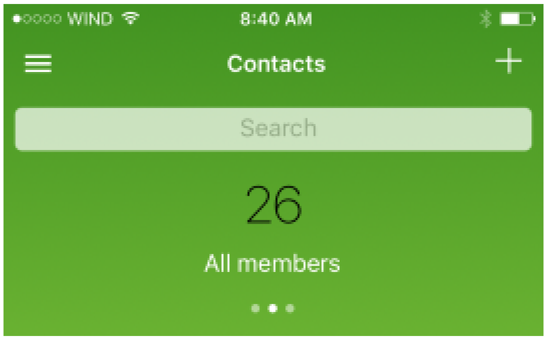
The Contacts module groups your contacts by categories onto different tabs.



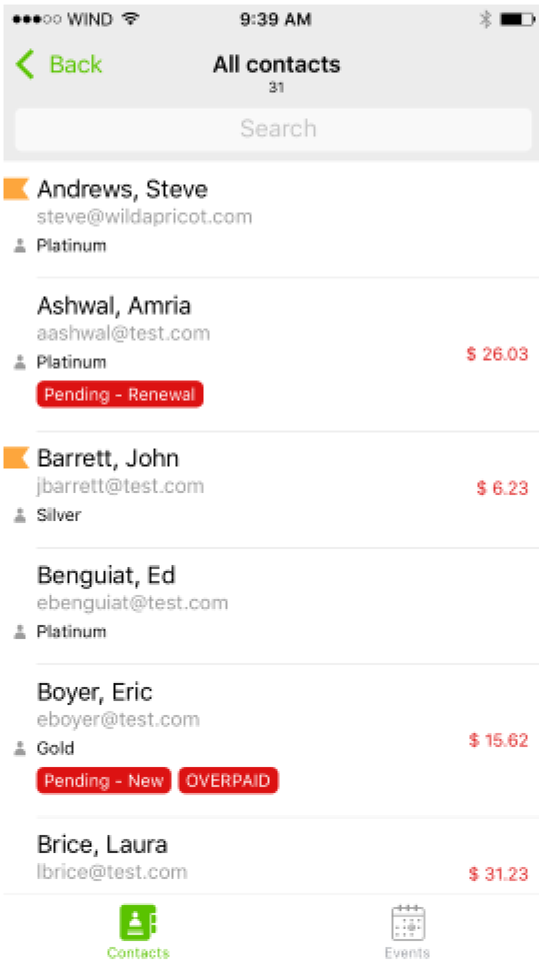
From the General tab, you can view the contacts you've opened most recently, view all contacts, view all members, or view archived members.

On the other tabs within the Contacts module, contacts are grouped by saved contact and member searches, membership levels, and member groups.

At the top of the Contacts module, the total number of contacts is displayed. You can tap this number to display a list of all contacts, or you can swipe left to view the number of members, then the number of new members (those added over the last month).

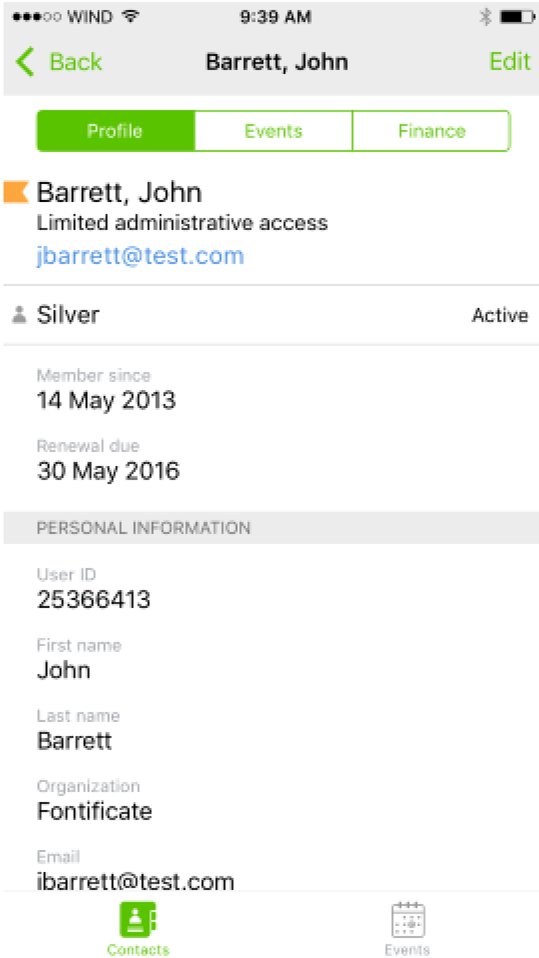


Tapping one of the contact categories will display the contacts grouped under that category.



For each contact, their name, email, organization, and membership level is displayed. An orange chevron indicates that the contact is an administrator. A red notice will appear for any contact who has an outstanding financial or membership issue requiring attention – such as an outstanding invoice or a pending application requiring approval.

To view all the details for a contact, tap their name within the list. Within the contact details, their profile, event registrations, and financial transactions appear on different tabs.



Pictures fields are not currently displayed within the contact's profile. Empty fields are not displayed when viewing contact details.

On the Events tab, you can tap an event registration to view or modify the event registration details.

On the Finances tab, invoices and payments are listed. At the top of the Finances tab appears the contact's balance due or overpaid amount, and the number of open invoices. You can record a manual payment against one or more open invoices. Payments and settled invoices are displayed in gray. You cannot currently view the details of a payment or settled invoice.

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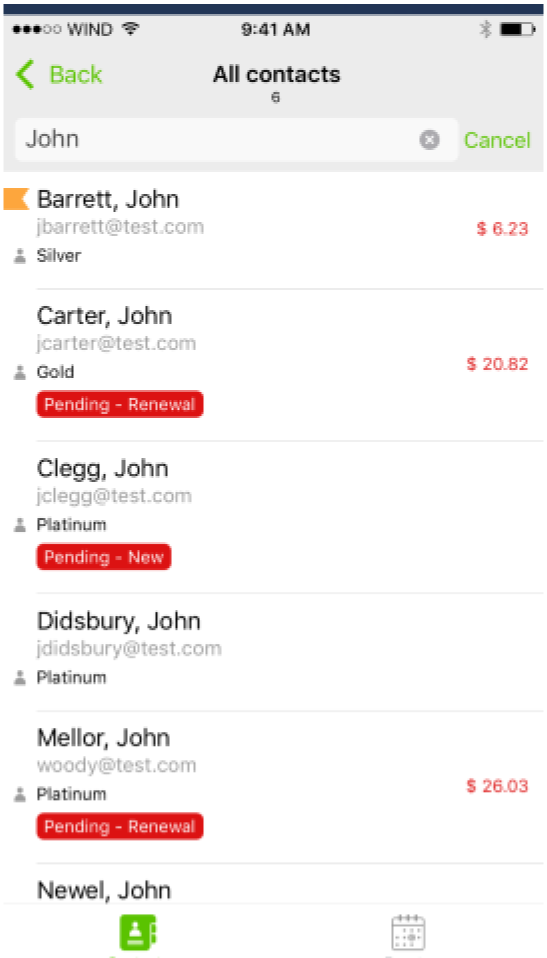
Searching for contacts

To search for contacts, tap within the search box on a contact list then enter a search string. After you tap the search button, the current list will be filtered by the search string.



Any contact whose name, organization, or email address includes the search string will be displayed. To remove the search filter, tap **Cancel**.

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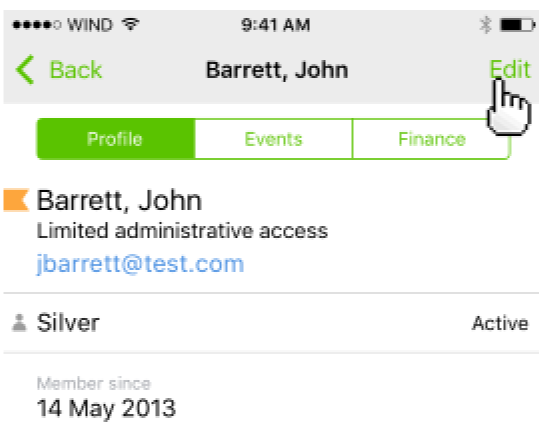
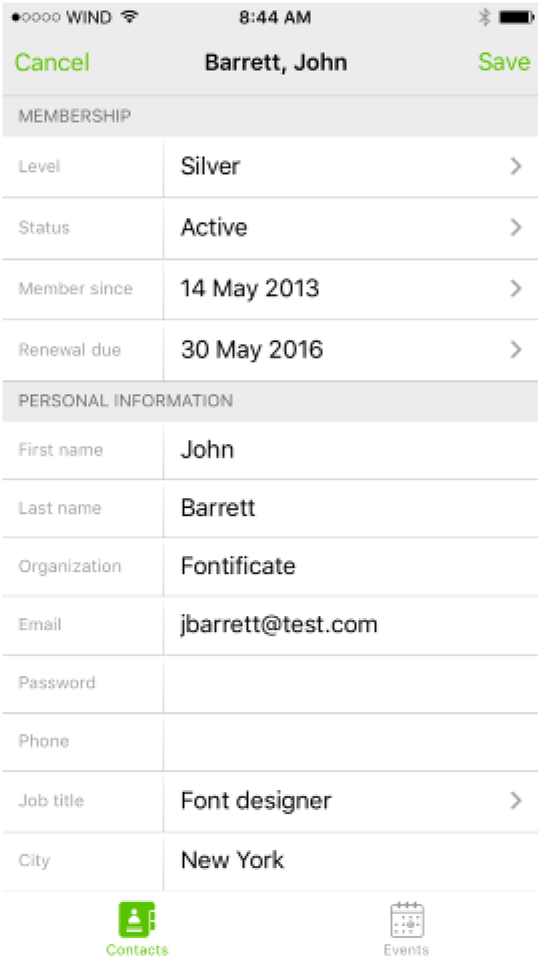
Modifying members and contacts

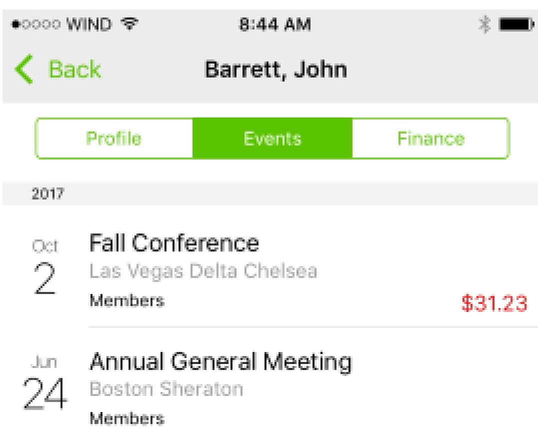
To modify the contact details for a member or other contact, tap **Edit** button from the tab containing the information you want to change.



From the **Profile** tab, you can modify any of the profile field values, plus membership details including level, status, and renewal due.



From the **Events** tab, you can tap an event registration to view or modify event registration details.



Unpaid registration fees will appear in red. For more information, see Viewing and modifying a registration (below).

On the **Finances** tab, you can tap **Pay** to record manual payments for outstanding invoices. For more information, see Paying an outstanding invoice (below).

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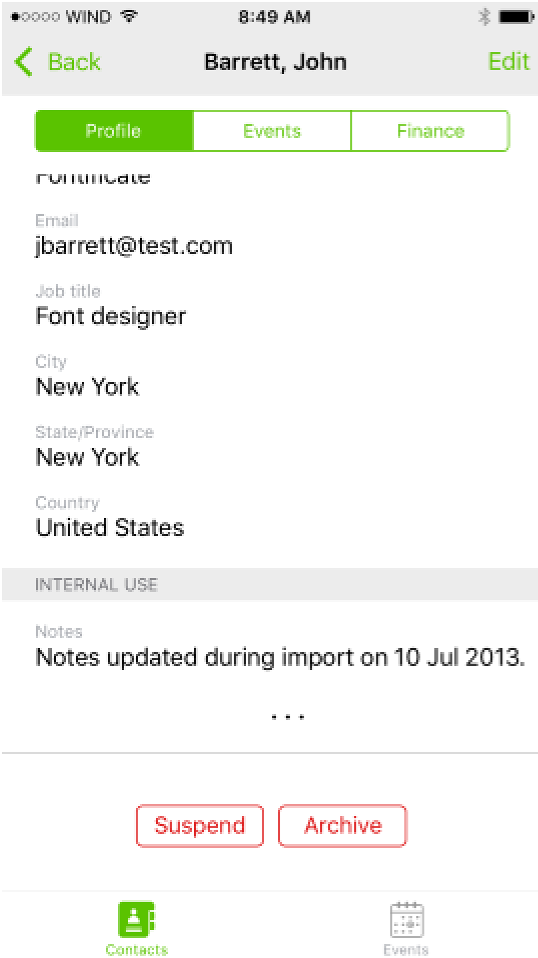
Suspending a member or archiving a contact

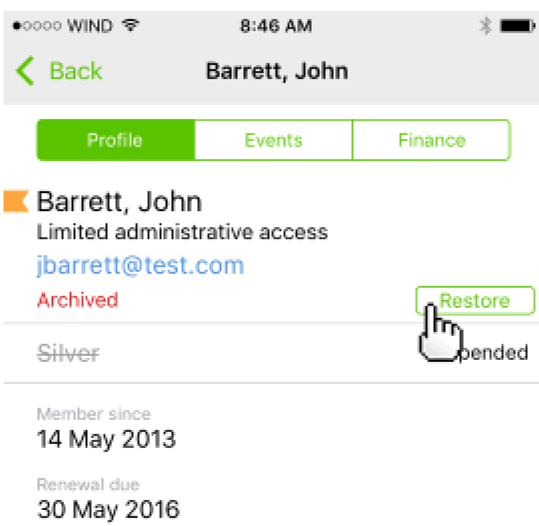
You can suspend a member or archive a contact by tapping the **Suspend** or **Archive** button at the very bottom of their **Profile** tab.



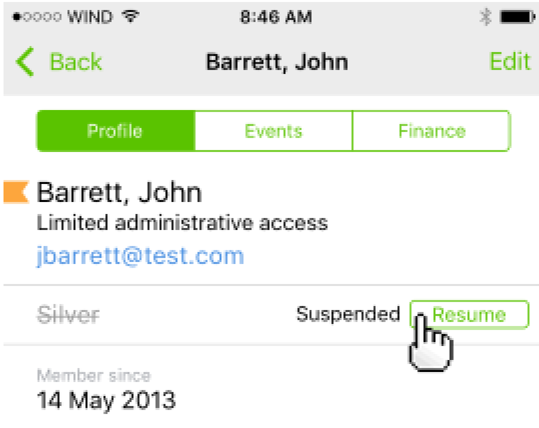
Suspending a member will convert the member to a non-member contact. Archiving a contact will remove the contact from your regular contact lists. The archived contact will not receive automatic emails or email blasts, and will no longer count towards your database limit. When you archive a contact who is a member, their membership will be automatically suspended.

Suspending or archiving a bundle administrator will automatically suspend or archive all the members in that bundle.

After archiving a contact, you can restore the contact by tapping the **Restore** button at the top of their **Profile** tab.



To restore the membership of a suspended member, tap the **Resume** button at the top of their **Profile** tab.



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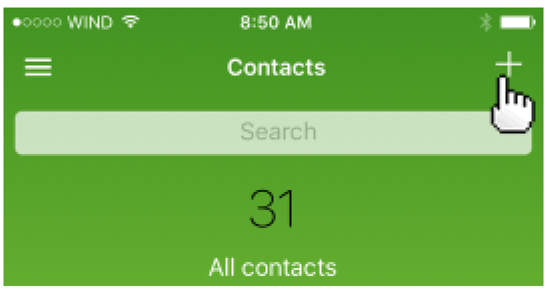
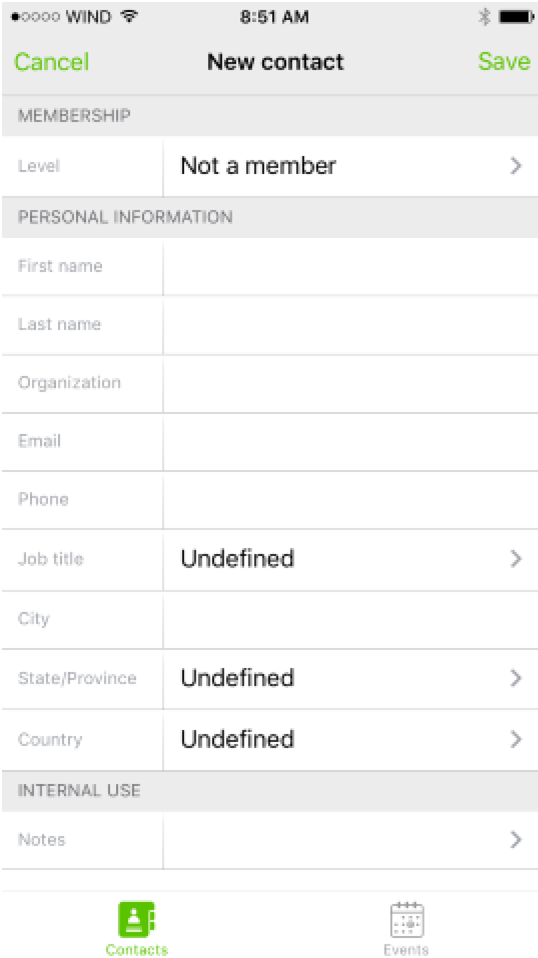
Adding a new member or contact

To add a new member or other contact, tap the plus sign at the top of the main Contacts screen.



On the **New contact** screen, you can enter contact details, and optionally, select a membership level.



To create a new contact record, you need to complete one of the following fields: First name, Last name, Email, or Organization.

If you assign a membership level that charges a fee and select a pending membership status, an invoice will be automatically generated. You can delete invoices only from the browser version of Wild Apricot.

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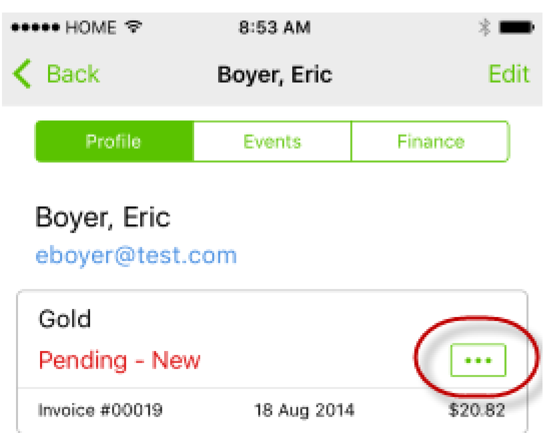
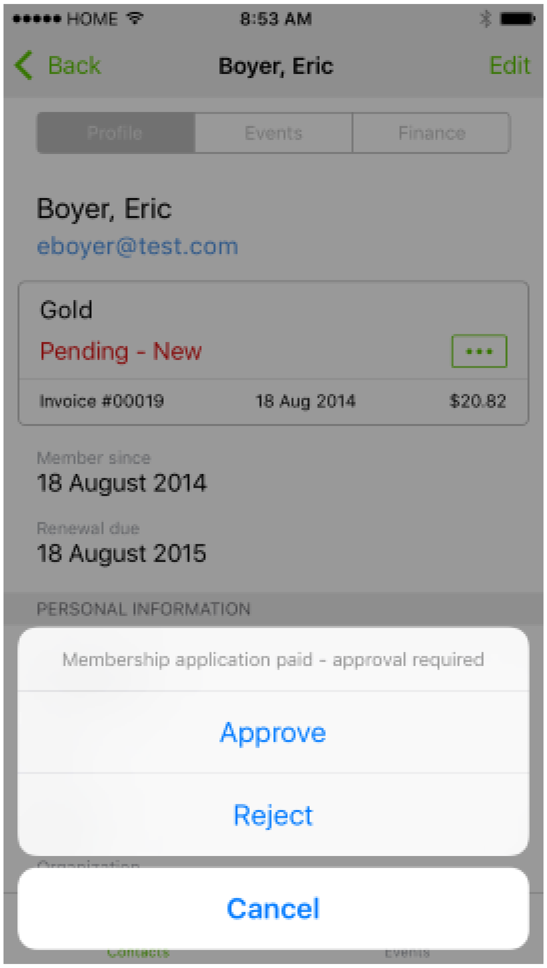
Approving or rejecting pending memberships

Where the membership status is pending – Pending - New, Pending - Renewal, or Pending - Level change – a button will appear, along with the pending membership details.



Tapping this button will display a number of options, including the ability to approve or reject the pending membership.



The options available depend on whether the membership fee has been paid (or is not required), and whether an invoice has been generated.

Payment status	Options
Fee has been paid (or is not required)	Approve, Reject
Fee not paid, invoice generated	Activate without payment, Record payment, Reject
Fee not paid, no invoice	Activate without invoice, Generate invoice, Reject

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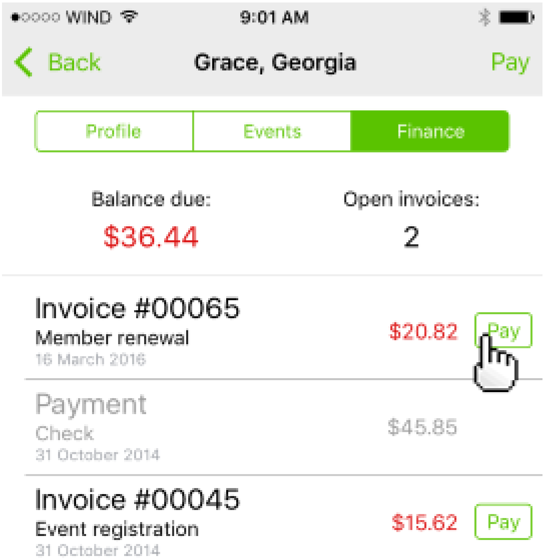
Paying an outstanding invoice

If a contact has an unpaid balance, the amount will be appear in red beside their name in contact lists and event registration lists. Using the Wild Apricot app, you can record a manual payment toward the balance.

> You cannot record an online payment using the Wild Apricot app. However, your contacts can view your site using a browser on a mobile device and make an online payment while signing up for membership or an event, or through their member profile.

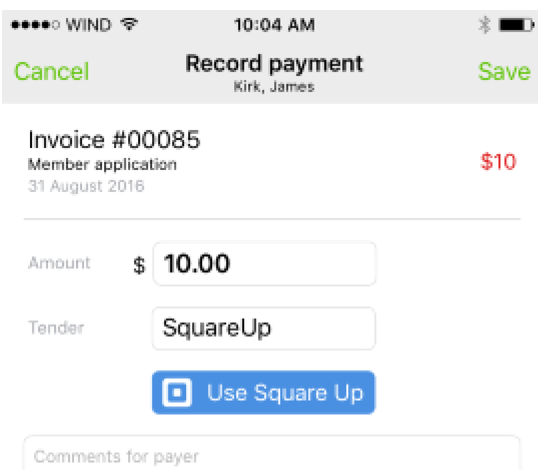
To record a manual payment towards an outstanding invoice, go to the **Finance** tab for the contact, then tap the **Pay** button beside the invoice you want to pay .



On the **Record payment** screen that appears, you can enter the amount of the payment, select a payment tender, enter a comment for the payer, and record any internal notes. Once you are finished recording the payment, tap **Save**.

> You cannot apply a previously recorded unsettled payment to an outstanding invoice. You can delete invoices and payments only from the browser version of Wild Apricot.

If you have enabled integration with Square, you can click the **Use SquareUp** button to process a credit card payment for this invoice.



After you click the **Use SquareUp** button, you will be asked for permission to open the Square Point of Sale app. From the Point of Sale app, you enter the credit card number or use the card reader to swipe the card. Once you complete the transaction within the Point of Sale app, you will be returned to your Wild Apricot app, and the payment details will be recorded in your Wild Apricot account. Within the payment details, the Square Up transaction ID will be recorded in the internal notes.

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Events module

Within the Events module, you view event details, manage event registrations, and check in event attendees.

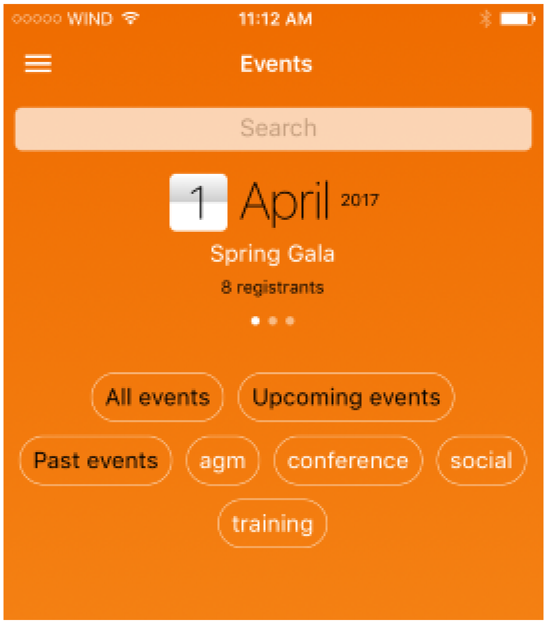
What can't you do within the Events module?

- Customize registration forms
- Set up event emails
- Add new event tags
- Add, remove, or modify separate guest registrations

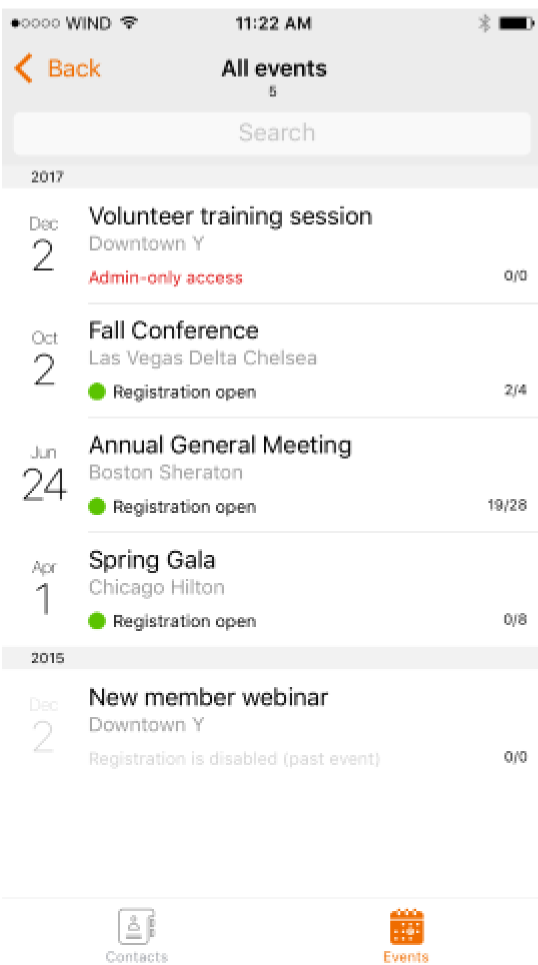
To jump to the Events module, tap **Events** at the bottom of the screen.

Viewing events

The Event module groups your events into a number of categories. In addition to the **All events** option, events are grouped into upcoming and past events, and by event tag.

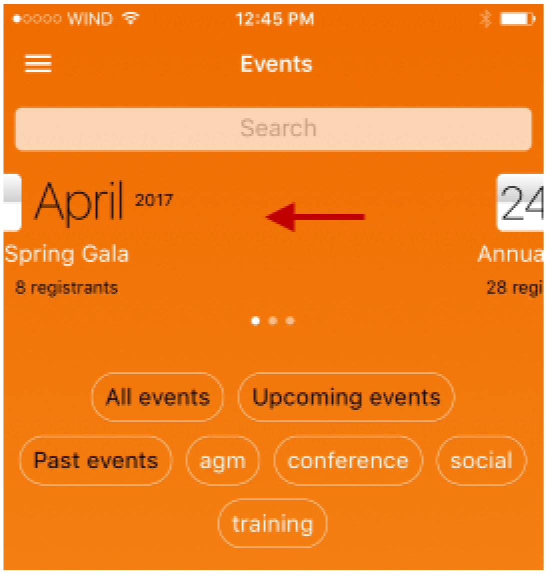


Tapping any of these event categories will display the events grouped under that category.



For each event, the list displays its title, starting date, location, registration status, and the number of checked in registrants vs. total registrants. A green dot indicates that the event is open for registration. Red text will appear if the event is restricted to administrators, selected membership levels, or selected member groups. Past events are marked with a gray starting date.

The next upcoming event with registration enabled appears at the top of the Events module. You can tap this event to view its details, or swipe left to scroll through all upcoming events with registration enabled.



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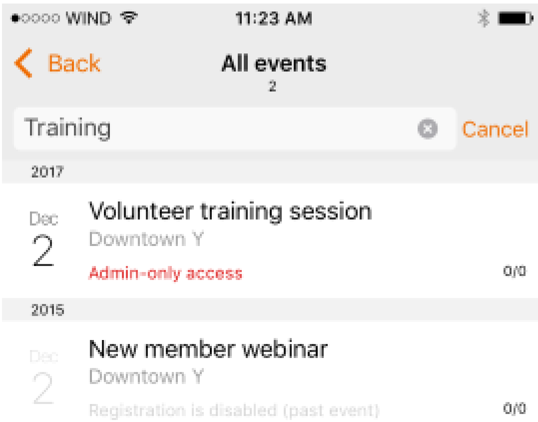
Searching for events

To search for events, tap the search icon from an event list then enter a search string. After you tap the search button, the current list will be filtered by the search string.

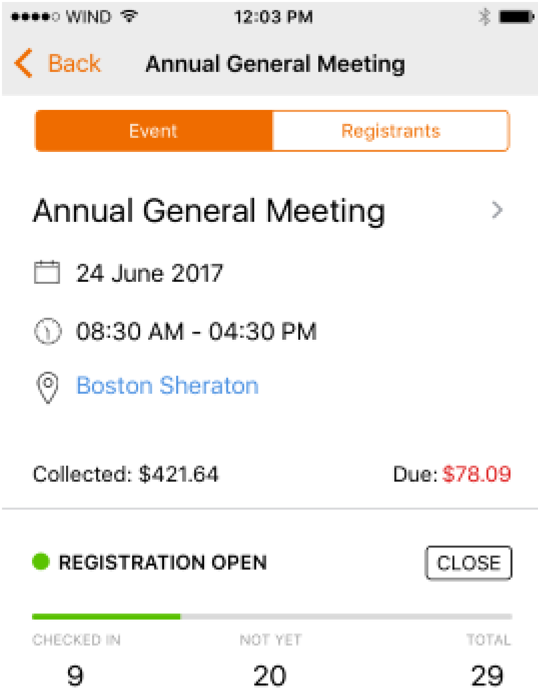


Events whose title, description, location, or tag includes the search string will be displayed.

To remove the search filter, tap **Cancel**.

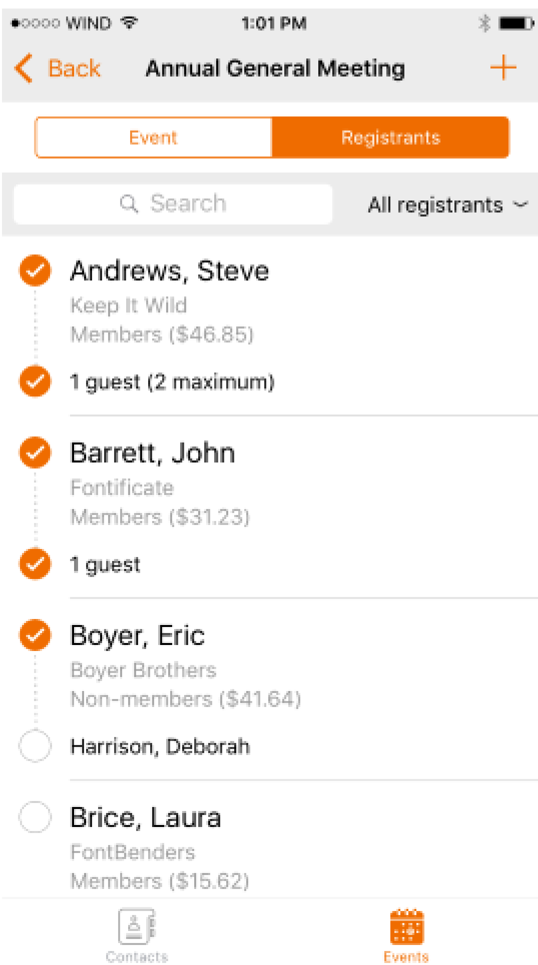
Viewing event details

To view the details of an event, tap the event within the list. Event details include the name, location, and starting date of the event, the number of checked in registrants, the total number of registrants (including guests), the collected event fees, and the outstanding event fees.



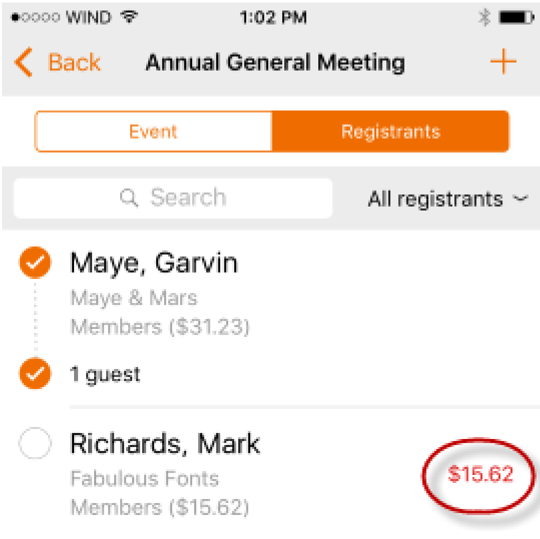
To view the event description, tap the event title. To open or close the event for registration, click the button to the right of the registration status.

The list of registrants appears on the **Registrants** tab.



For each registrant, the list displays the name, organization, registration type, the name(s) or number of guests (depending on whether contact information or separate registrations are required for guests under this registration type), and their checked-in status.

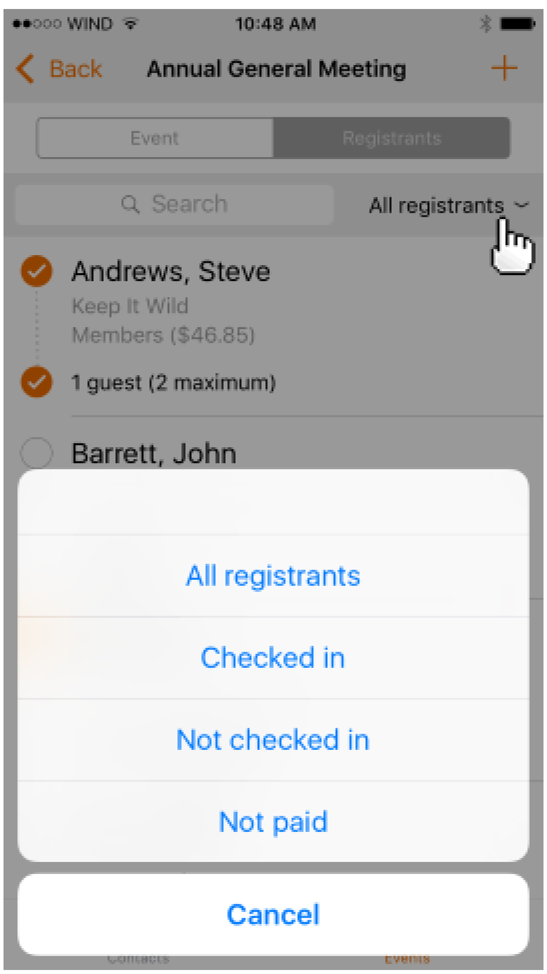
If the registration fee has not been fully paid, the outstanding balance will appear in red to the right of the registrant's name.



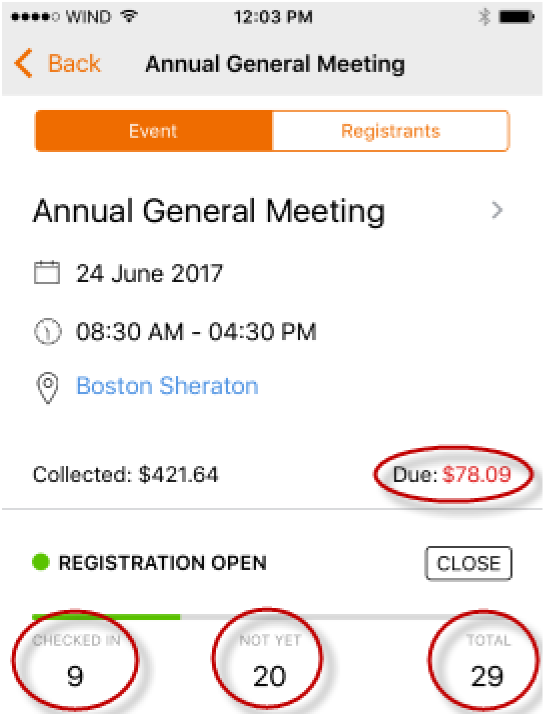
To record payment of the outstanding balance, tap the registrant's name within the registration details. On the screen that appears, you can tap **Pay** to record the payment.

Filtering the registrants list

You can filter the registrants list by tapping the **All registrants** dropdown and selecting a filter from the menu that appears.



You can also jump to a filtered registrants list by tapping on the totals appearing the event details screen.



Searching for event registrants

To search for a registrant, tap the search icon at the top of the screen then enter a search string and tap the search button.

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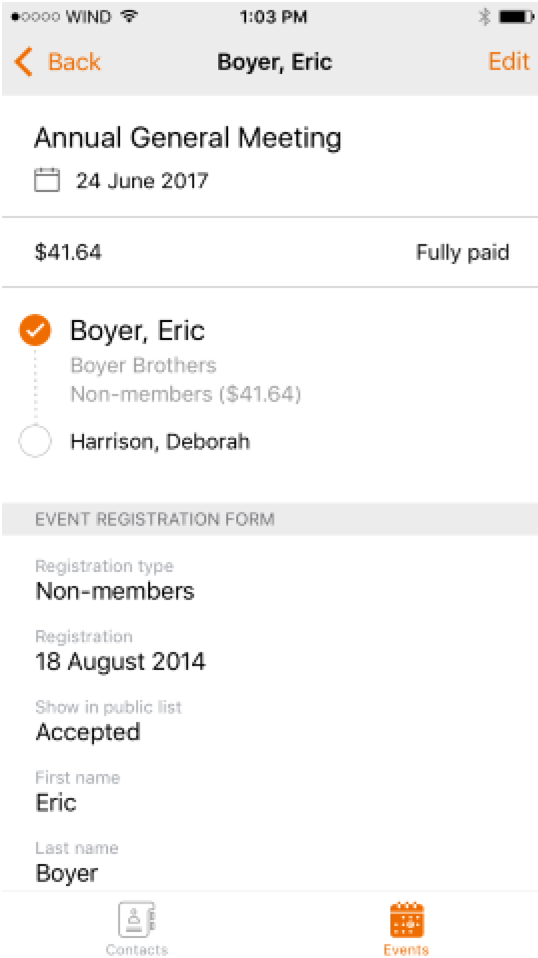
Viewing and modifying a registration

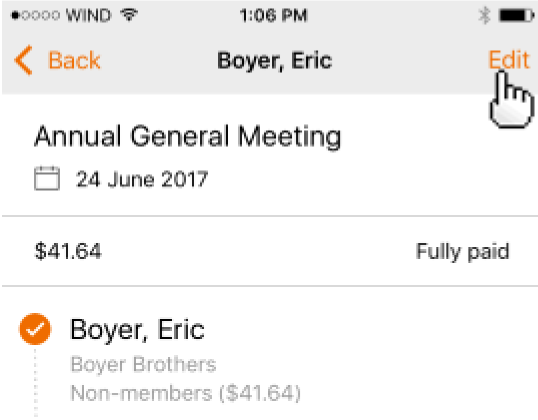
To view the details of a particular event registration, tap the registrant's name within the list. The registration details include all information entered on the event registration form.



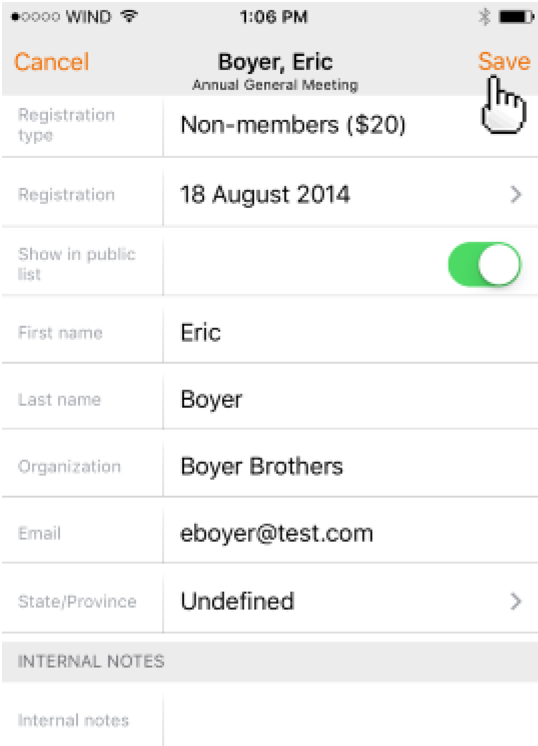
If the registration fee has been paid, the phrase **Fully paid** will appear. If the fee is unpaid, the outstanding amount will be displayed in red.

When you tap the outstanding amount within an event registration, you'll go to the **Record payment** screen where you can tap the **Pay** button and record a manual payment toward the registration fee.

To modify the event registration details, tap **Edit** at the top of the registration details.



You can then modify the information appearing on the event registration form. You cannot add, modify, or delete separate guest registrations, but you can change the number of guests if the registration type does not require contact information for guests. Once you have finished making your changes, tap **Save**.

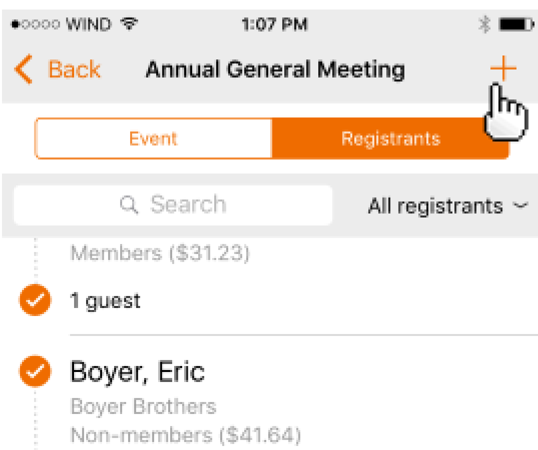


Deleting an event registration

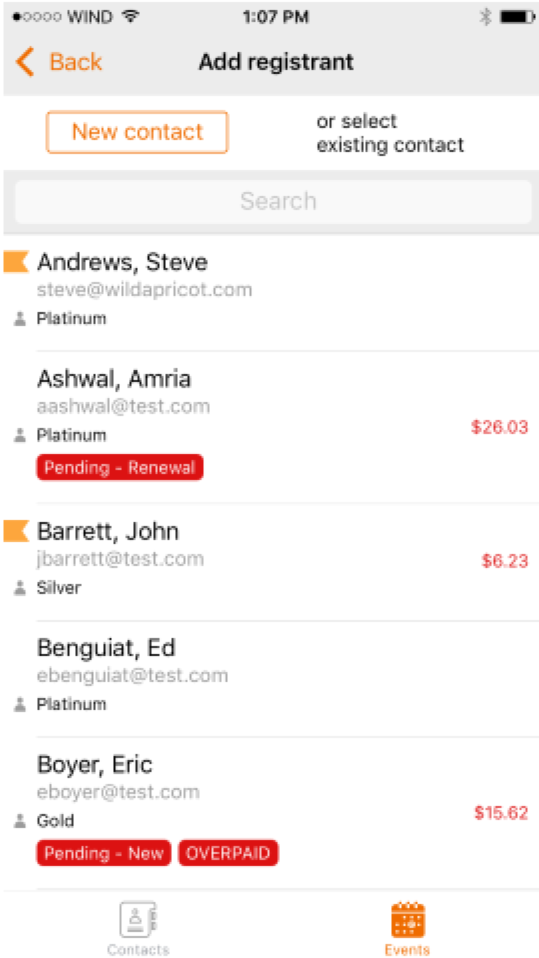
To delete an existing event registration, scroll to the bottom of the registration details and tap the **Delete registration** button.

Adding a new registrant

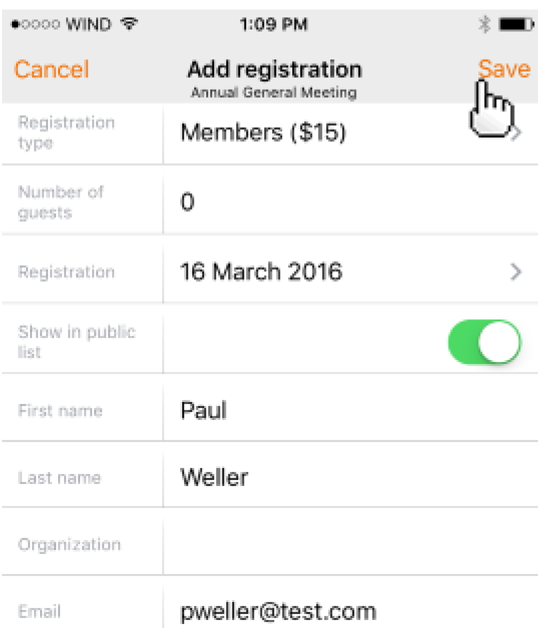
To add a new event registrant, tap the plus sign (+) at the top of the registrants list.



You can register a new contact, or select an existing one.



Next, you complete the event registration form and finalize the registration by tapping **Save** .



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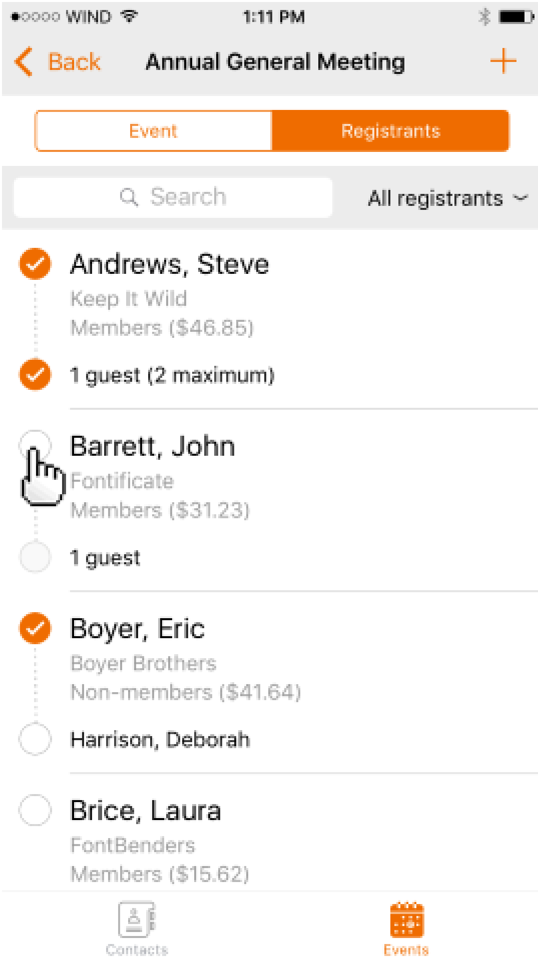
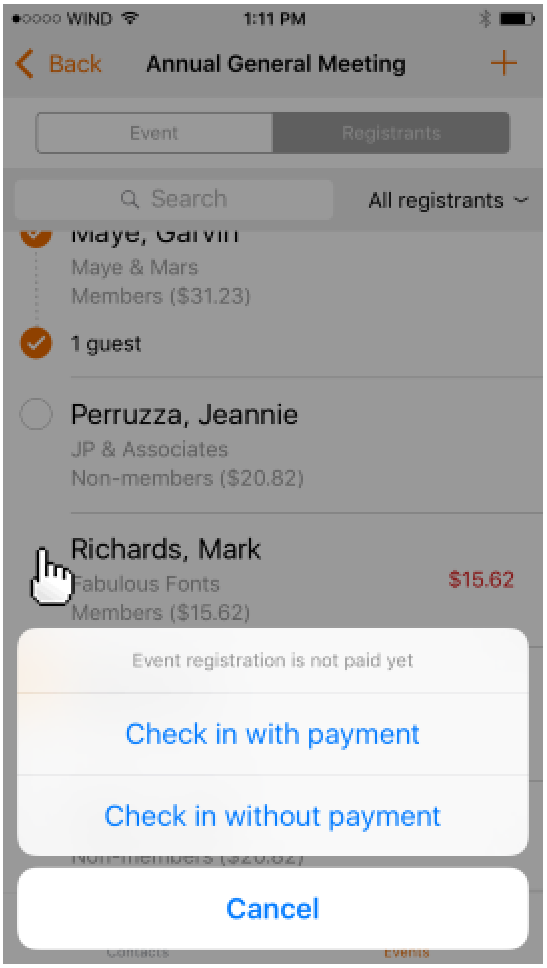
Checking in registrants

To check in a registrant – record their attendance at the event – you tap the open circle beside the registrant's name, within the registrants list or within the registration details.

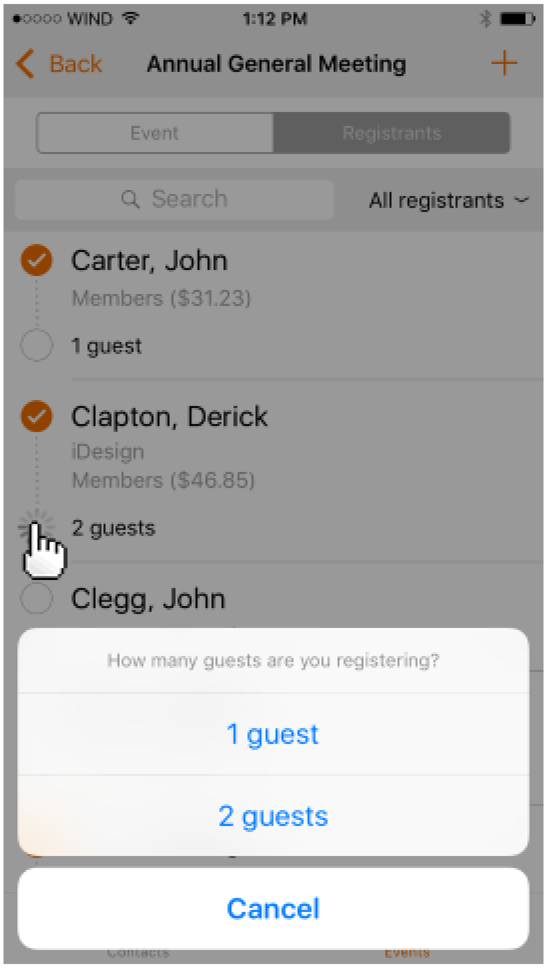


A check mark indicates that the registrant has been checked in. To undo a check in, tap the check mark beside the checked in registrant's name.

If you are checking in a registrant who hasn't fully paid the registration fee, you will be asked whether you want to check in the registrant with or without payment.



To check in a single guest, tap the open circle beside the name of the guest or the number of guests (depending on your guest registration settings). If there are multiple guests without contact or registration information under a particular registration, you tap the open circle then select the number of guests to be checked in.

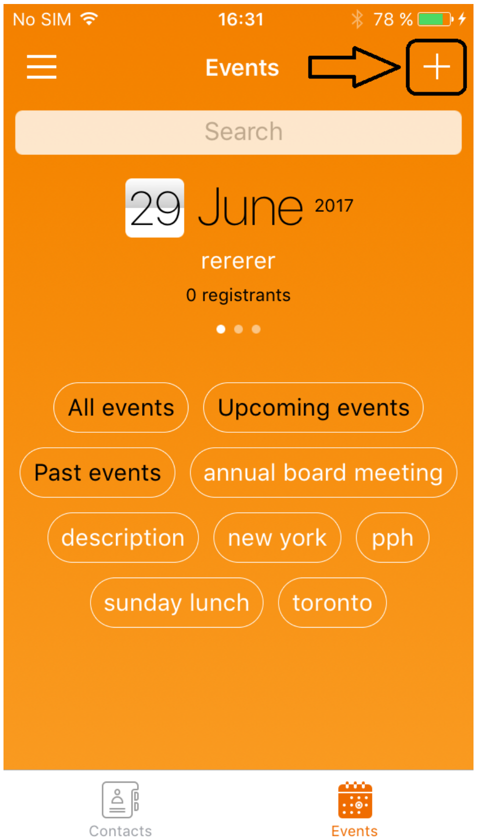


Adding an event

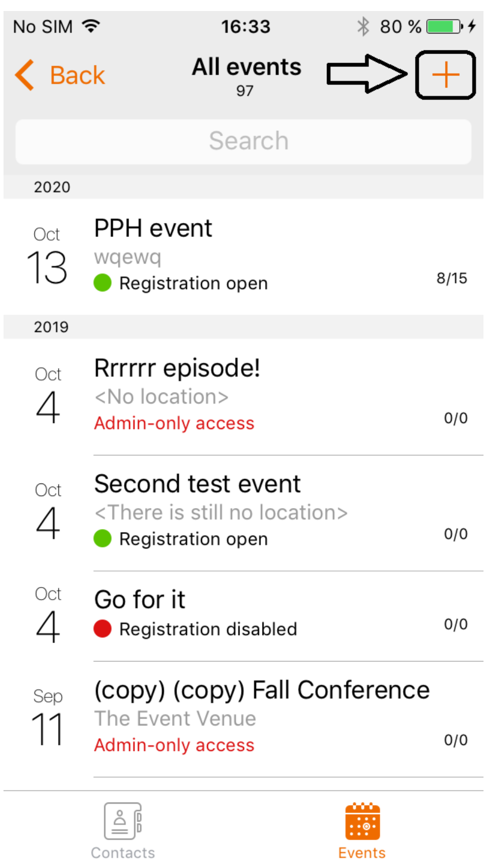
You can add events from the Wild Apricot mobile app, but there are some limitations. While adding an event from the app, you cannot:

- Customize the registration form
- Set up event emails
- Use the content editor to format the event description
- Add new event tags
- Create multisession events
- Customize event timezone
- Modify registration message
- Manage waitlist

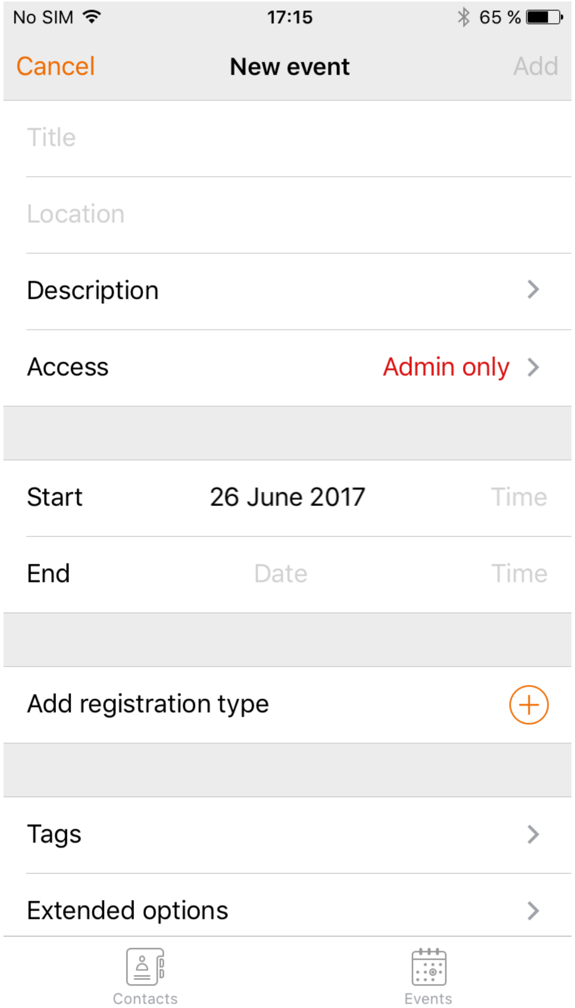
To add a new event, tap the + sign at the top of the Events dashboard...



...or at the top of the events list.

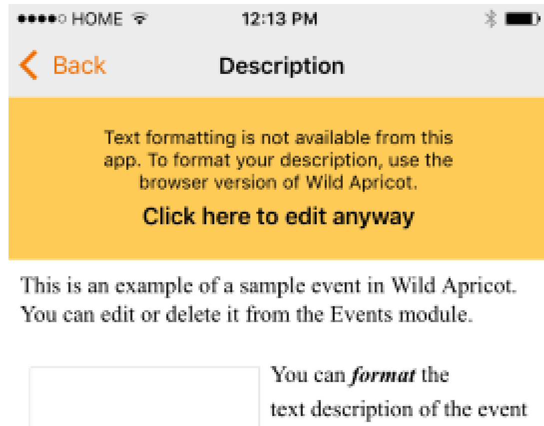
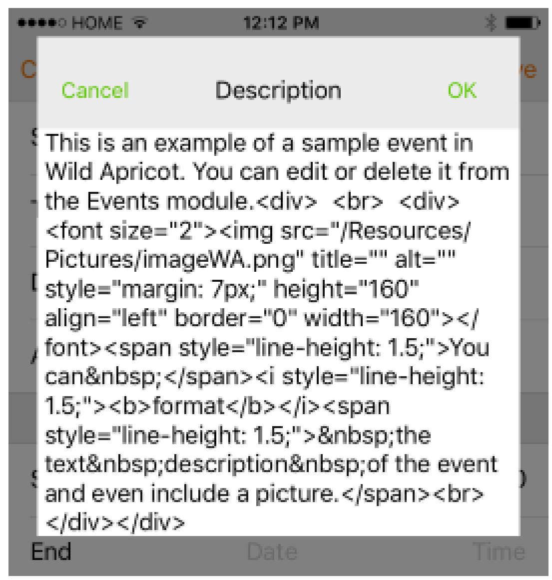


In either case, the **New event** screen will appear.

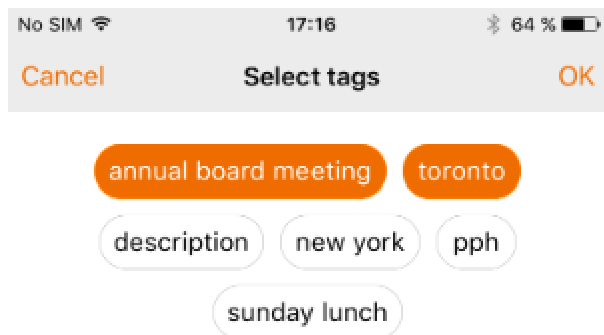


From here, you can specify the following information. You must specify a title and a start date before you can save the event.

Field	Description
Title	(*Required*) The name of the event as it will appear to visitors on the event calendar and upcoming events gadgets.
Location	Location of the event. This will appear on event calendars and upcoming events gadgets.

Description	Description of the event. To format the description text, you cannot use the content editor available from the browser version of Wild Apricot. Instead, you can format the text using basic HTML markup code. If rich text formatting was already applied to the event description using the browser version of Wild Apricot, the following warning will appear:  If you tap the yellow bar, the description will appear formatted with HTML code, which you can modify and save. 
Access	Controls who can view this event on an event calendar or via a direct link . You can make this event public, restrict the visibility of the event by membership level, member groups, or limit access to administrators only. If you restrict access by both membership levels and membership groups, then members who belong to any of the selected levels **or** groups will be able to view the event. If you check the **All levels** or **All groups** option then all levels or groups – including any levels or groups added in the future – will be selected.
Start	The event's start date and time. The start date is required but the start time is optional. The date format is based on your organization settings.

<table>
<tr><td>End</td><td>The event's end date and time. The date format is based on your organization settings. The end date is not displayed if it's the same as the start date.</td></tr>
<tr><td>Registration types</td><td>The registration types available for this event. Registration are like ticket types. To add a registration type, tap the Add registration type option. After you've added a registration type, you can modify it by tapping its name within the list of registration types. For each registration type, you can specify the following options:
<table>
<tr><th>Option</th><th>Description</th></tr>
<tr><td>Name</td><td>(Required) Name used to identify the registration type (e.g. Non-member or VIP seating). This will be displayed to the registrant when asked to choose the registration type.</td></tr>
<tr><td>Limit</td><td>The maximum number of registrations allowed for this registration type. Leave this field blank if you don't want to set any limit. An overall registration can also be set for the event itself.</td></tr>
<tr><td>Price</td><td>Base price for this registration type. This does not include any additional event options available for a separate cost.</td></tr>
<tr><td>Description</td><td>Description of the registration type.</td></tr>
<tr><td>Enabled</td><td>Controls whether the registration type is active and available.</td></tr>
<tr><td>Available from / Available to</td><td>Controls when this registration type is available. You can set a From date, a Through date, or both. Leave both fields blank if you don't want to set a date limit. Registration will remain open from 12:00 am on the From date, until 12:00 pm on the Through date.</td></tr>
<tr><td>Availability</td><td>Controls whether this registration type is available to everyone, just certain members hip levels, or to anyone with the registration code you specify. Using registration codes allows you to offer discount pricing to selected people.</td></tr>
</table></td></tr>
</table>

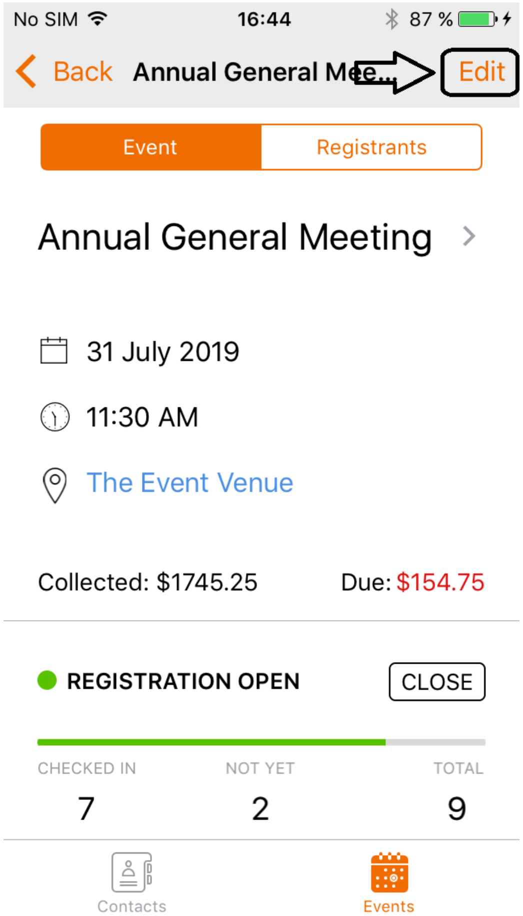
<table>
<tr><td></td><td><table><tr><td>Guest policy</td><td>If guest registration is enabled, registrants can register guests at the same time that they submit their own registration. You can control whether to collect contact information for each guest, collect full registration information for each guest, or just ask for the total number of guests. Unless you choose to collect full registration information for each guest, you can charge a special guest price for the event.</td></tr></table></td></tr>
<tr><td>Tags</td><td>Labels used to categorize events . You can only choose from existing tags. You cannot add a new event tag from this app. Selected tags will appear on the Select tags screen with an orange background.


To select or deselect a tag, tap it.</td></tr>
</table>

<table>
<tr>
<td>Extended options</td>
<td>
<table>
<tr><th>Option</th><th>Description</th></tr>
<tr><td>Overall limit</td><td>The overall limit on the total number of registrations for the event. After the event registration limit is reached, the registration will be closed and an email will be sent to the event organizer. On your event calendar page, visitors will see that the event is closed for registration, and that there are no spaces left. You can also set registration limits for individual registration types.</td></tr>
<tr><td>Multiple registrations</td><td>Controls whether contacts can register multiple times for the same event. When multiple registrations are disabled at the event level, this option will not be available for individual registration types.</td></tr>
<tr><td>Payment info</td><td>The payment instructions that appear on the payment confirmation screen.</td></tr>
<tr><td>Show registrants</td><td>If you enable this option, a Registered link will appear for the event on the event calendar and on the event details. With this option enabled, you can control whether the registrants list is visible to all visitors or just members, and whether the list includes pending registrations (for which payment has not yet been received)</td></tr>
</table>
</td>
</tr>
</table>

Modifying an existing event

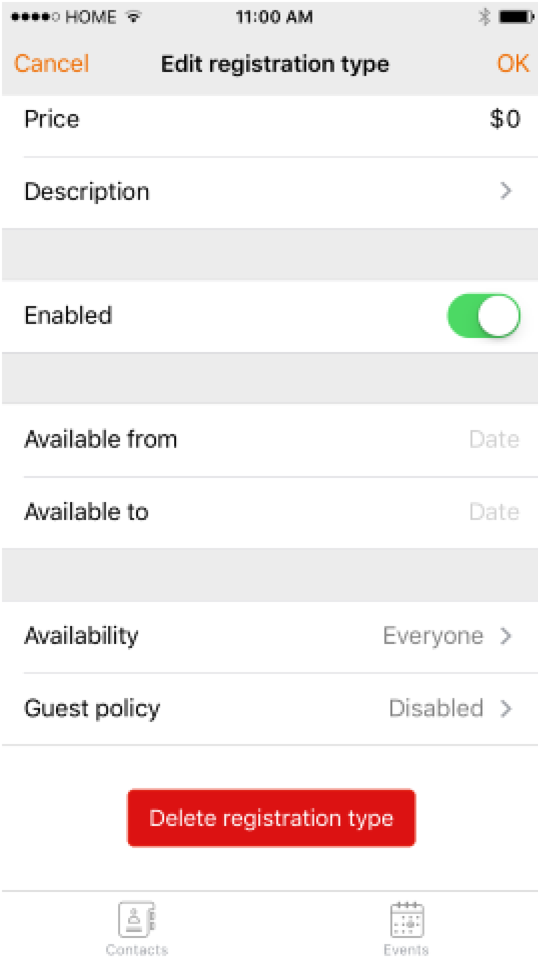
To modify an existing event, tap the **Edit** option at the top of the event details screen.



Deleting a registration type

You can delete a registration type if someone hasn't already registered using that registration type. To delete a registration type, follow these steps:

1. Begin editing the event.
2. Tap the registration type within the **Edit event** screen.
3. Scroll down to the bottom of the **Edit registration type** screen.
4. Tap the **Delete registration type** button.

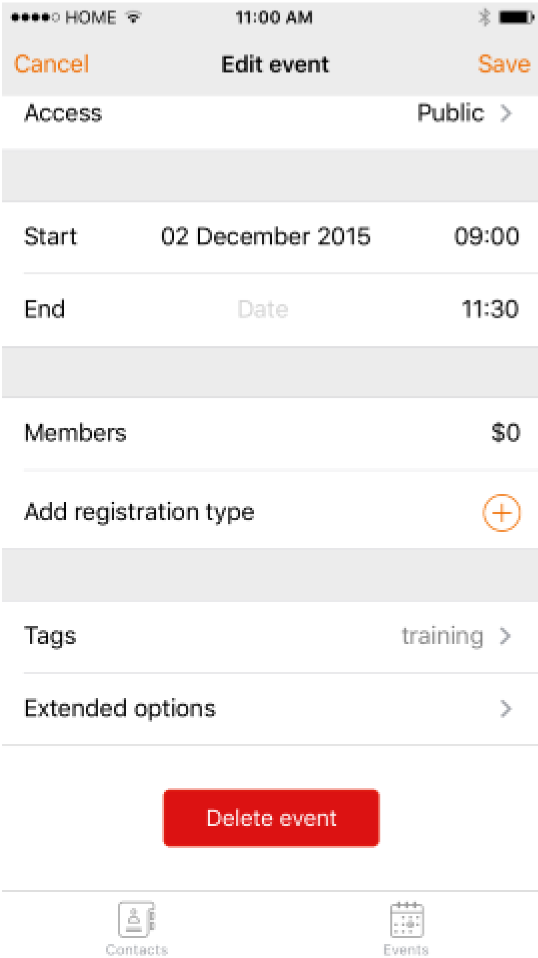


5. Tap the **OK** button if you are sure you want to delete this registration type.

Deleting an event

You can delete an event if there are currently no registrants for the event. To delete an event, follow these steps:

1. Begin editing the event.
2. Scroll down to the bottom of the **Edit event** screen.
3. Tap the **Delete event** button.



4. Tap the **OK** button if you are sure you want to delete this registration type.

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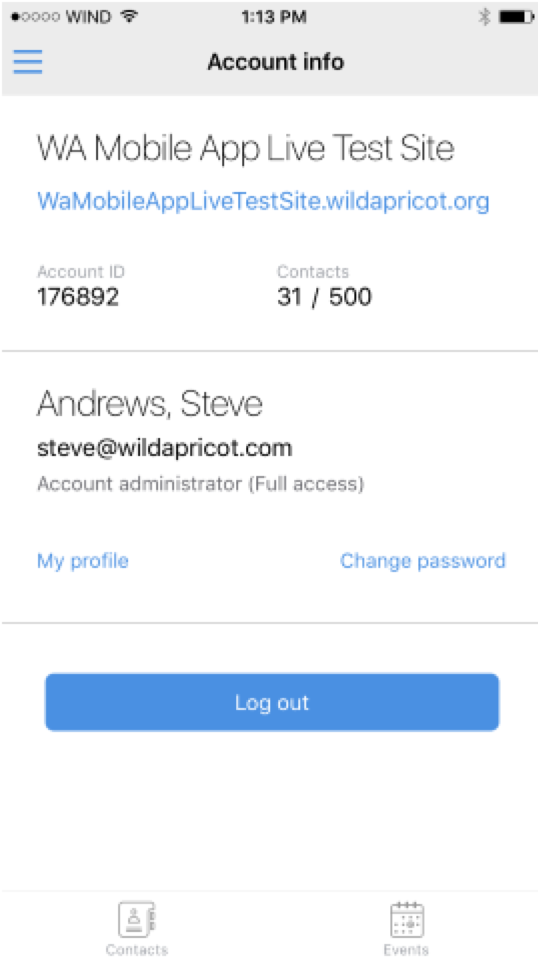
Account module

From the Account module, you can log out of the app, and change your account password. You can also tap your website URL to view the site in a browser.

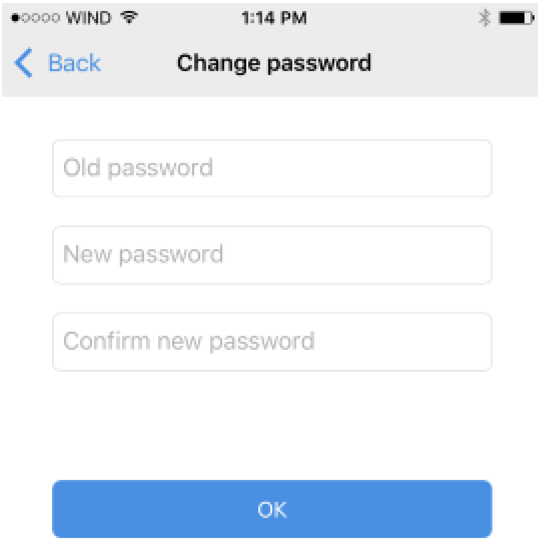
To jump to the Account module, slide left to right from any screen and tap the **Account** option that appears on the left.

To log out of your Wild Apricot account, tap the **Log out** button from the Account screen.



You will be returned to the Login screen.

To change your Wild Apricot account password, tap the **Change password** button from the Account screen. On the **Set new password** screen, you can enter and save a new password.



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Known issues

There are no known issues in latest version of the apps.

Releases history

We've published 12 updates of our mobile app so far:

- Mobile 2.1 — Mobile 2.1 – August 17, 2017 (both iOS and Android)
- Mobile 2.0 — Mobile 2.0 – July 24, 2017 (both iOS and Android)
- Mobile 1.8 — Mobile 1.8 – Released on May 25, 2017 (both iOS and Android)
- Mobile 1.7 — Mobile 1.7 – Released on March 13, 2017 (both iOS and Android)
- Mobile 1.6 — Mobile 1.6 – Released on December 30, 2016 (both iOS and Android)
- Mobile 1.5 — Mobile 1.5 – Released on December 2, 2016 (both iOS and Android)
- Mobile 1.4 — Mobile 1.4 – Released on September 8, 2016 (both iOS and Android)
- Mobile 1.3 — Mobile 1.3 – Released on April 4, 2016 (both iOS and Android)
- Mobile 1.2 — Mobile 1.2 – Released on October 21, 2015 (both iOS and Android)
- Mobile 1.1 iOS — Mobile 1.1 iOS – Released on July 8, 2015
- Mobile 1.0 Android — Mobile 1.0 Android – Released on March 23, 2015
- Mobile 1.0 iOS — Mobile 1.0 iOS – Released on September 15, 2014

Contacting support

If you can't find answers to your questions, you can contact our support department for assistance, free of charge. For contact options, slide left to right from any screen and tap the **Contact us** option that appears on the left. The **Contact us** screen displays links to contact us by phone or email, or to submit a support request. When you submit a support request, you provide details of your question or issue, which can lead to a faster response time.

Wild Apricot mobile app - Android

Wild Apricot mobile app - Android

Quick overview

Wild Apricot is software that helps associations, nonprofits, clubs, and other member-based organizations automate and simplify event, member, and website management.

After setting up a Wild Apricot account, you can use the Wild Apricot mobile app on Android to:

- add, modify, or delete an event
- add or check in event attendees
- add or modify event registrations
- delete an event registration
- add or modify members and other contacts
- search for contacts
- suspend a member
- archive a contact
- record manual payments

The current version of the Wild Apricot mobile app does **not** allow you to:

- create or modify saved searches
- view invoice or payment details
- delete invoices or payments
- customize registration forms
- set up event emails
- add new event tags
- add, remove, or modify separate guest registrations
- create or modify member groups
- send emails
- set up website pages

For the full range of Wild Apricot functionality, including the ability to design your website and set up events, you log into your Wild Apricot account from a browser.

SHOW ME (2:43)

Download the app

To download the Wild Apricot Android app for administrators, tap on the image below.

GET IT ON Google play

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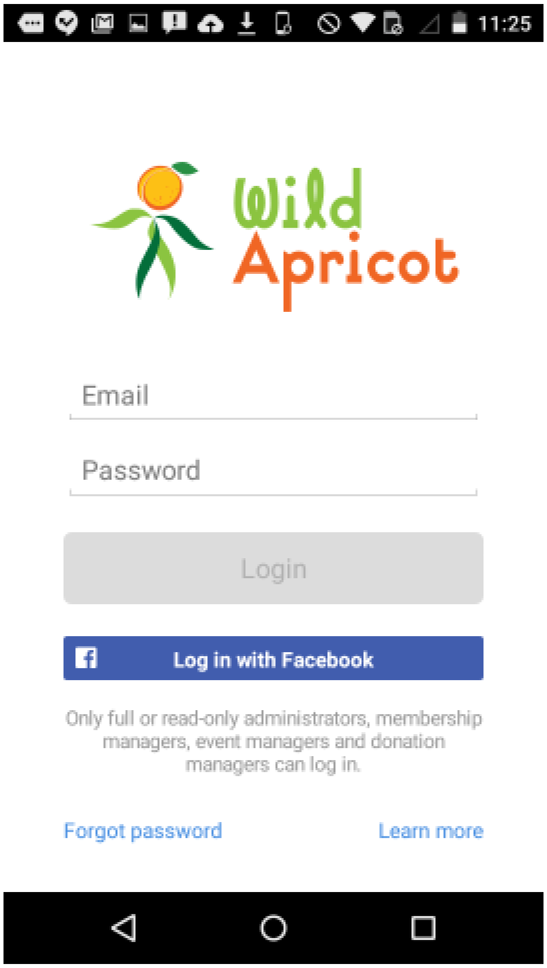
Logging in

Only full or read-only administrators, membership managers, event managers, or donation managers can log into the Wild Apricot app. After logging in, the options available to them will depend on their administrator permissions. For example, a membership manager will not see the Events tab.

You can log into your Wild Apricot account using the email address associated with your Wild Apricot account, or using your Facebook credentials – assuming you are using the same email address for a Wild Apricot administrator account.



If you are already logged into Facebook using the email address associated with your Wild Apricot site, tapping the **Log in with Facebook** button will automatically log you into your Wild Apricot account.

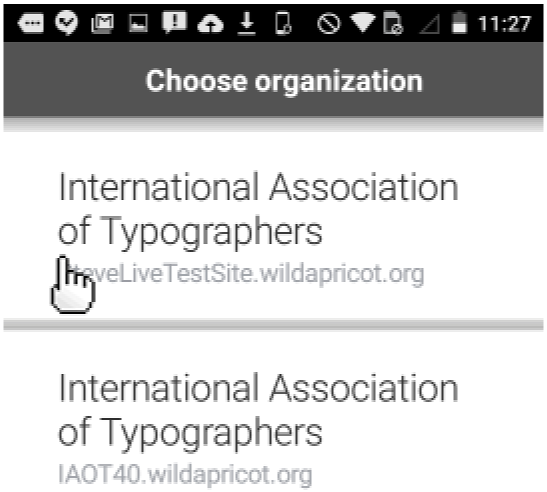
When logging using your email address, enter your email address and password, then tap the **Log in** button.

Currently, you cannot restore your password from the Wild Apricot app. If you do not remember your password, go to the Login screen on the browser version of your Wild Apricot account and click the **Forgot password** link next to the **Login** button. On the page that appears, you can enter your email address to receive a reset password link via email.

The first time you log into a Wild Apricot account, you will be required to accept Wild Apricot's terms of use before proceeding.

If you're not familiar with what the Wild Apricot mobile app can do, tap **Learn more** from the Login screen.

If there are multiple Wild Apricot accounts associated with your email address and password, you will be asked – after logging in – to choose the organization you want to manage at the moment.



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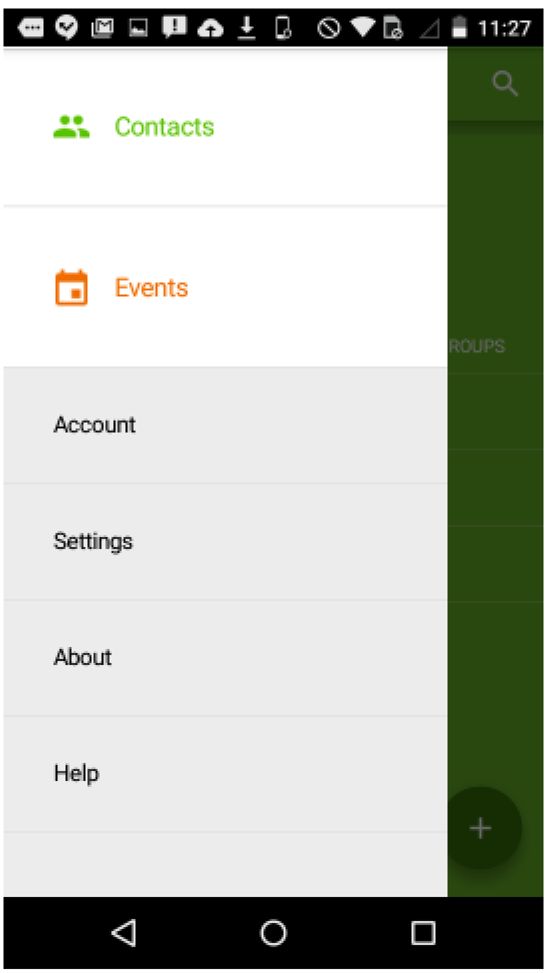
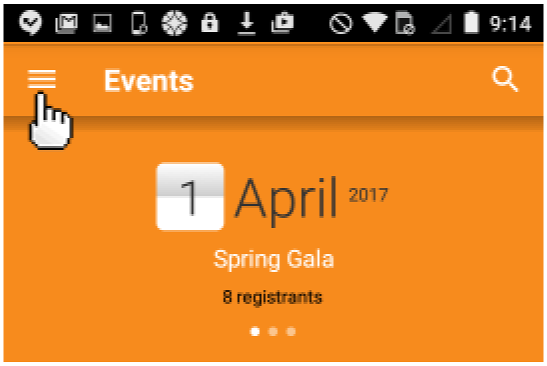
Navigating the app

The Wild Apricot app consists of a number of modules: Contacts, Events, Account, and Help. To jump to one of these modules, swipe from the left and tap the module name from the menu that appears.



On some screens, you can also view these options by tapping the menu icon at the top left.



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Contacts module

Within the Contacts module, you view and manage members and other contacts.

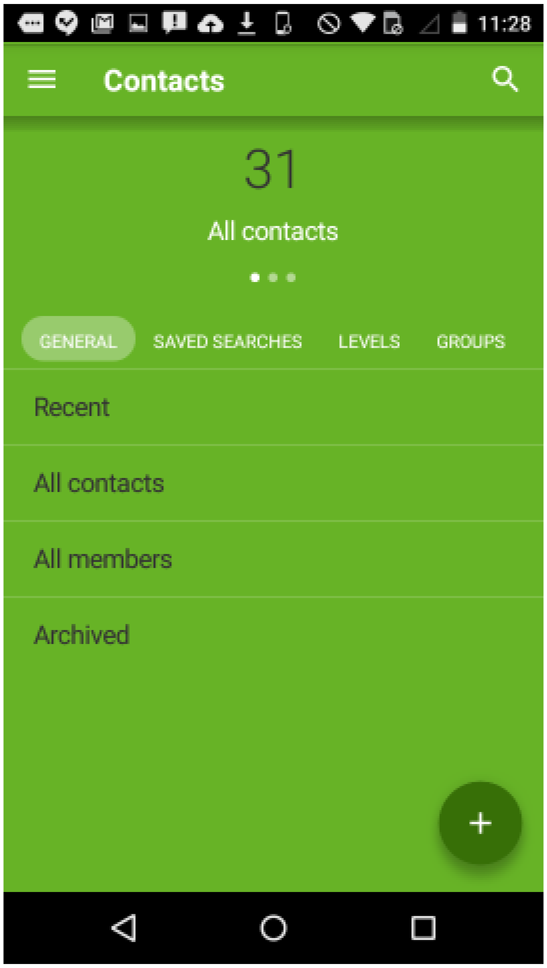
What can't you do with contacts?

- You cannot create or modify member groups
- You cannot perform advanced searches
- You cannot modify previously saved searches
- You cannot view invoice or payment details
- You cannot delete invoices or payments
- You cannot accept online credit card payments

To jump to the Contacts module, swipe from the left and tap **Contacts** within the navigation menu that appears.

Viewing contacts

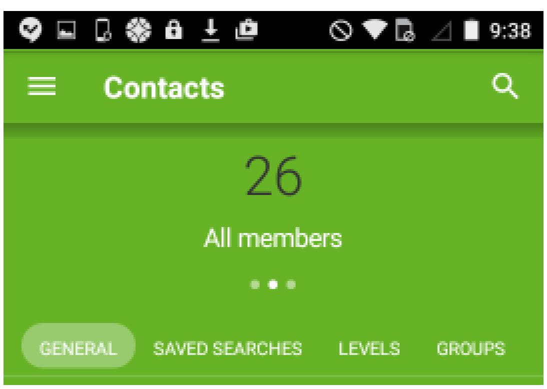
The Contacts module groups your contacts by categories onto different tabs.



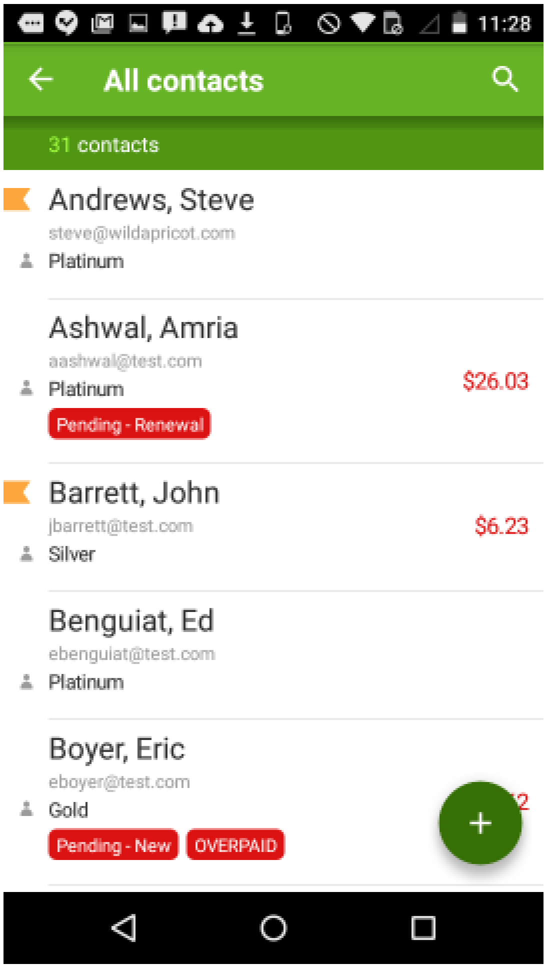
From the General tab, you can view the contacts you've opened most recently, view all contacts, view all members, or view archived members.

On the other tabs within the Contacts module, contacts are grouped by saved contact and member searches, membership levels, and member groups.

At the top of the Contacts module, the total number of contacts is displayed. You can tap this number to display a list of all contacts, or you can swipe left to view the number of members, then the number of new members (those added over the last month).

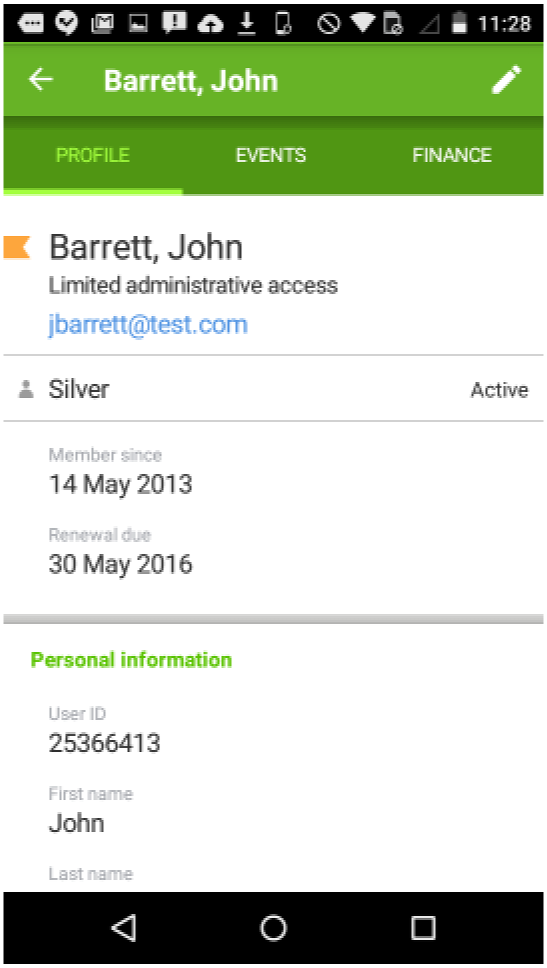


Tapping one of the contact categories will display the contacts grouped under that category.



For each contact, their name, email, organization, and membership level is displayed. An orange chevron indicates that the contact is an administrator. A red notice will appear for any contact who has an outstanding financial or membership issue requiring attention – such as an outstanding invoice or a pending application requiring approval.

To view all the details for a contact, tap their name within the list. Within the contact details, their profile, event registrations, and financial transactions appear on different tabs.



Pictures fields are not currently displayed within the contact's profile. Empty fields are not displayed when viewing contact details.

On the Events tab, you can tap an event registration to view or modify the event registration details.

On the Finances tab, invoices and payments are listed. At the top of the Finances tab appears the contact's balance due or overpaid amount, and the number of open invoices. You can record a manual payment against one or more open invoices. Payments and settled invoices are displayed in gray. You cannot currently view the details of a payment or settled invoice.

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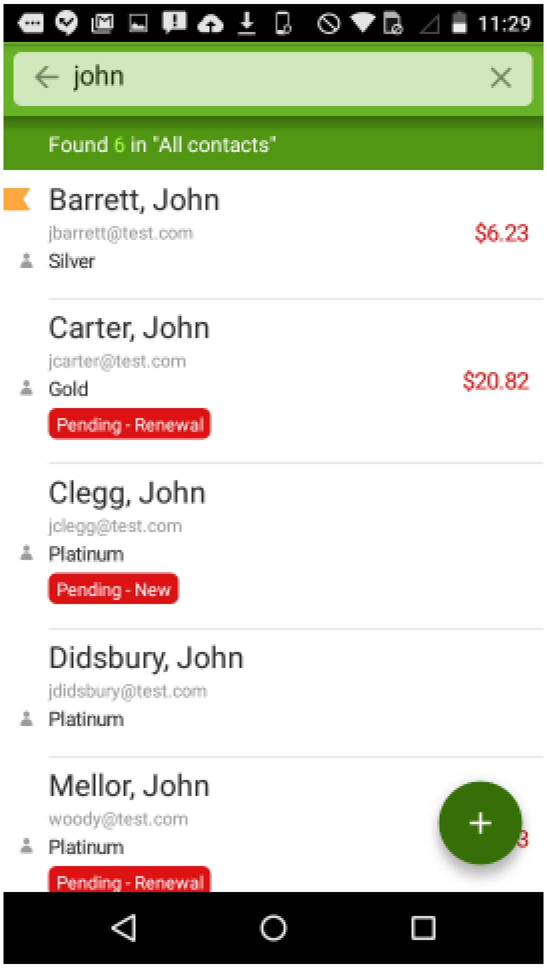
Searching for contacts

To search for contacts, tap within the search box from a contact list then enter a search string. After you tap the search icon, the current list will be filtered by the search string.



Any contact whose name, organization, or email address includes the search string will be displayed. To remove the search filter, tap the left arrow beside the search string.

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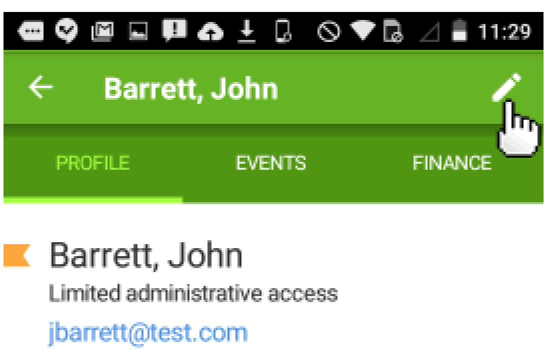
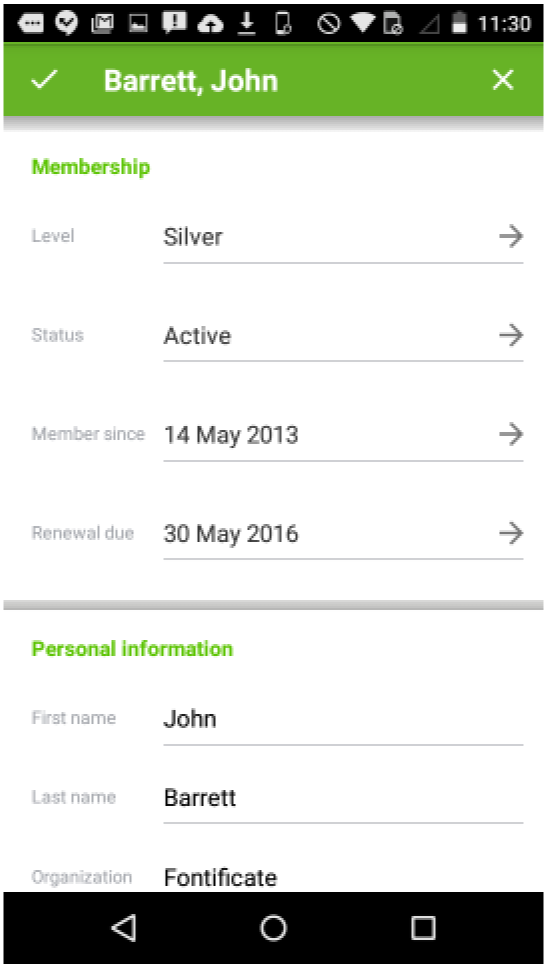
Modifying members and contacts

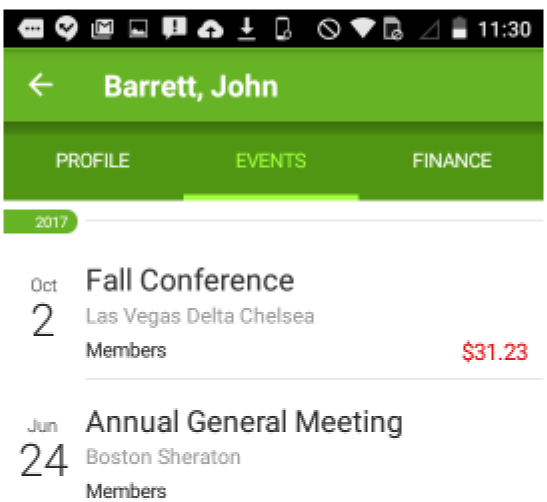
To modify the contact details for a member or other contact, display the tab containing the information you want to change, then tap the pencil icon at the top right.



From the **Profile** tab, you can modify any of the profile field values, plus membership details including level, status, and renewal due.



From the **Events** tab, you can tap an event registration to view or modify event registration details.



Unpaid registration fees will appear in red. For more information, see Viewing and modifying a registration (below).

On the **Finances** tab, you can tap **PAY** to record manual payments outstanding invoices. For more information, see Paying an outstanding invoice (below).

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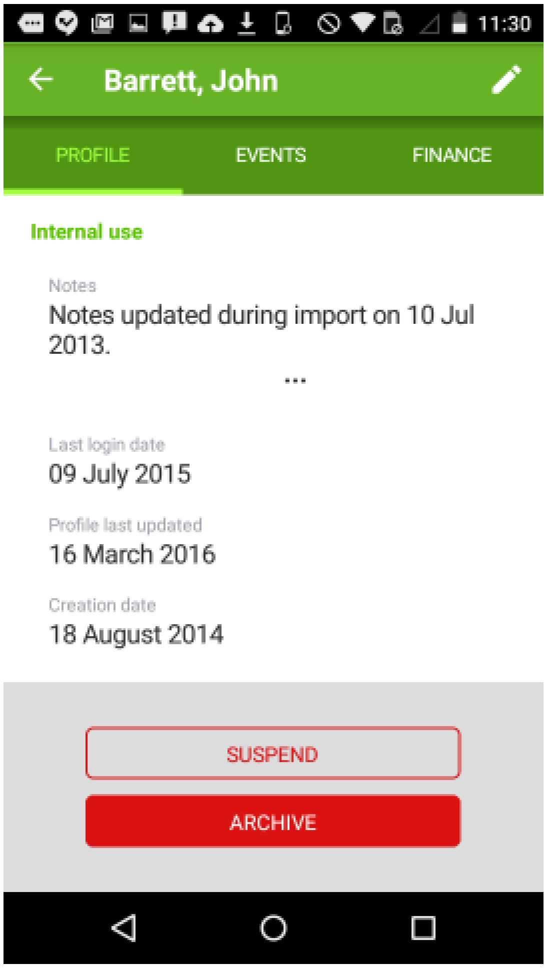
Suspending a member or archiving a contact

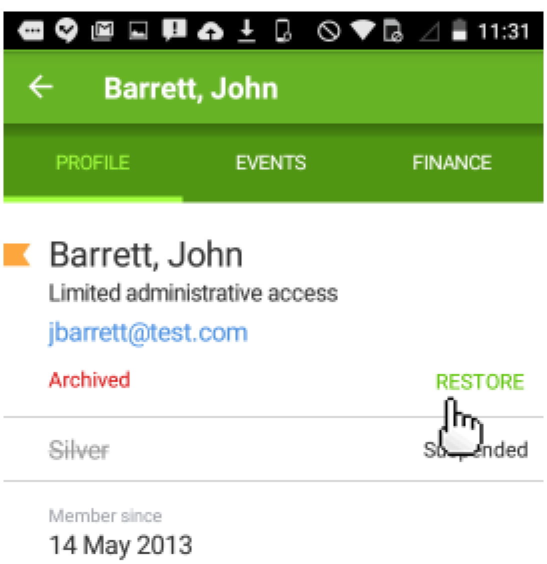
You can suspend a member or archive a contact by tapping the **Suspend** or **Archive** button at the very bottom of their **Profile** tab.



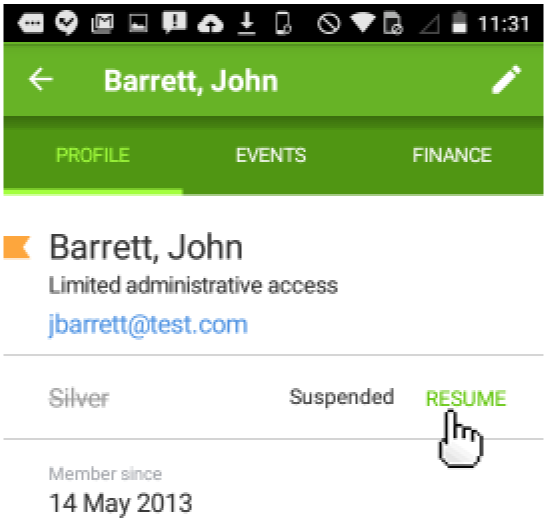
Suspending a member will convert the member to a non-member contact. Archiving a contact will remove the contact from your regular contact lists. The archived contact will not receive automatic emails or email blasts, and will no longer count towards your database limit. When you archive a contact who is a member, their membership will be automatically suspended.

Suspending or archiving a bundle administrator will automatically suspend or archive all the members in that bundle.

After archiving a contact, you can restore the contact by tapping the **RESTORE** option towards the top of their **Profile** tab.



To restore the membership of a suspended member, tap the **RESUME** option towards the top of their **Profile** tab.



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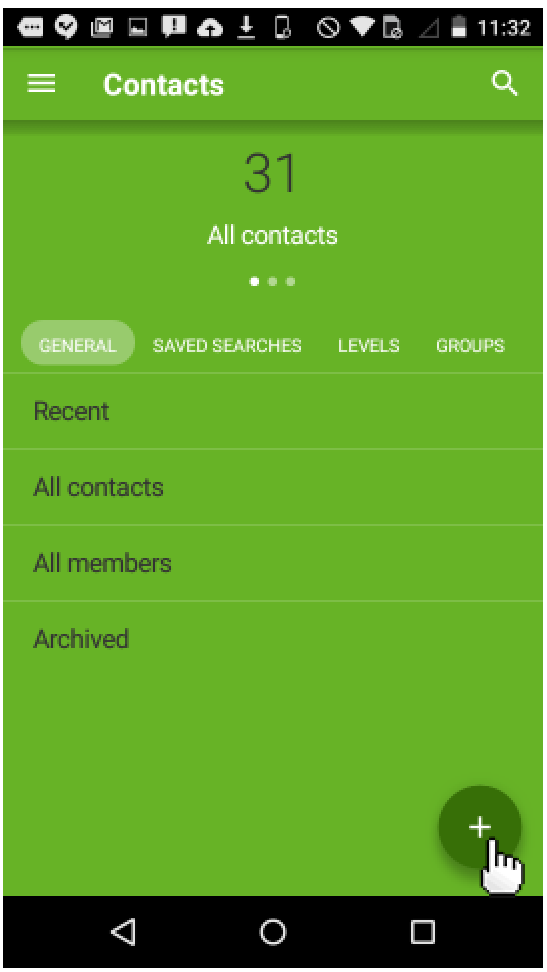
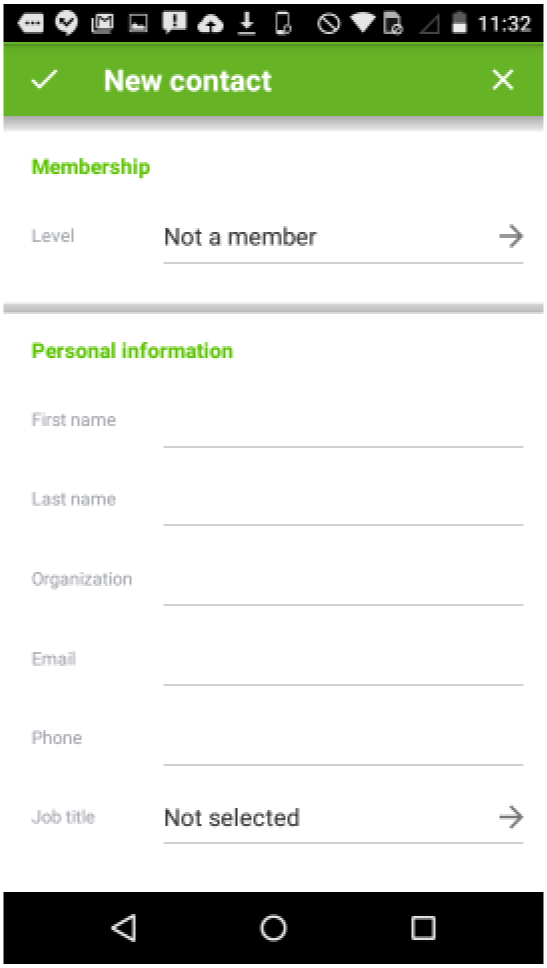
Adding a new member or contact

To add a new member or other contact, tap the plus sign at the bottom of the main Contacts screen.



On the **New contact** screen, you can enter contact details, and optionally, select a membership level.



To create a new contact record, you need to complete one of the following fields: First name, Last name, Email, or Organization.

If you assign a membership level that charges a fee and select a pending membership status, an invoice will be automatically generated. You can delete invoices only from the browser version of Wild Apricot.

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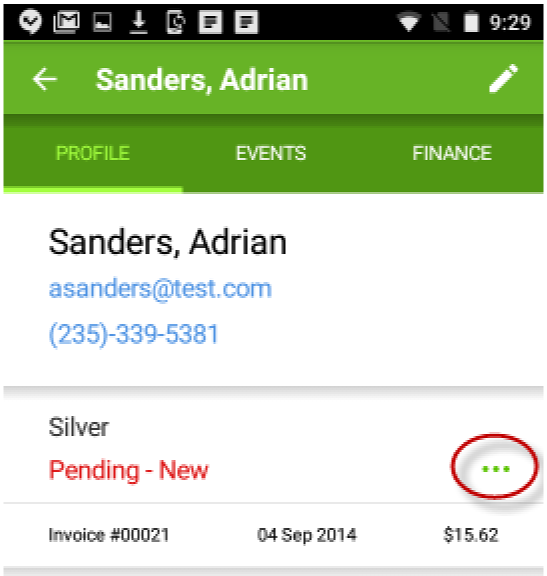
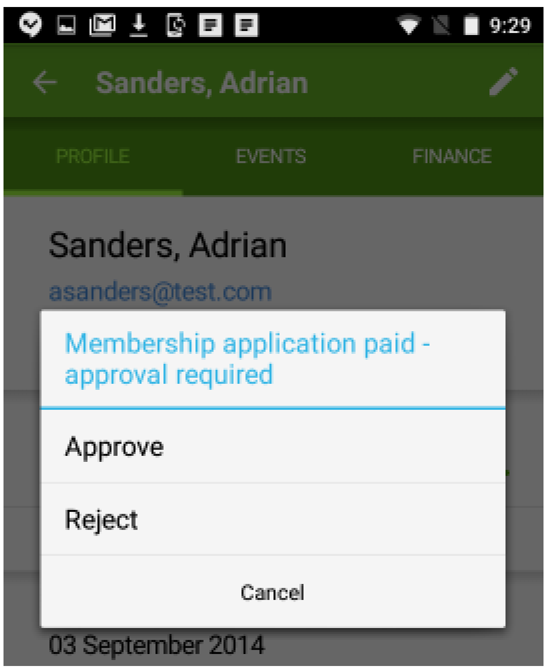
Approving or rejecting pending memberships

Where the membership status is pending – Pending - New, Pending - Renewal, or Pending - Level change – a button will appear, along with the pending membership details.



Tapping this button will display a number of options, including the ability to approve or reject the pending membership.



The options available depend on whether the membership fee has been paid (or is not required), and whether an invoice has been generated.

Payment status	Options
Fee has been paid (or is not required)	Approve, Reject
Fee not paid, invoice generated	Activate without payment, Record payment, Reject
Fee not paid, no invoice	Activate without invoice, Generate invoice, Reject

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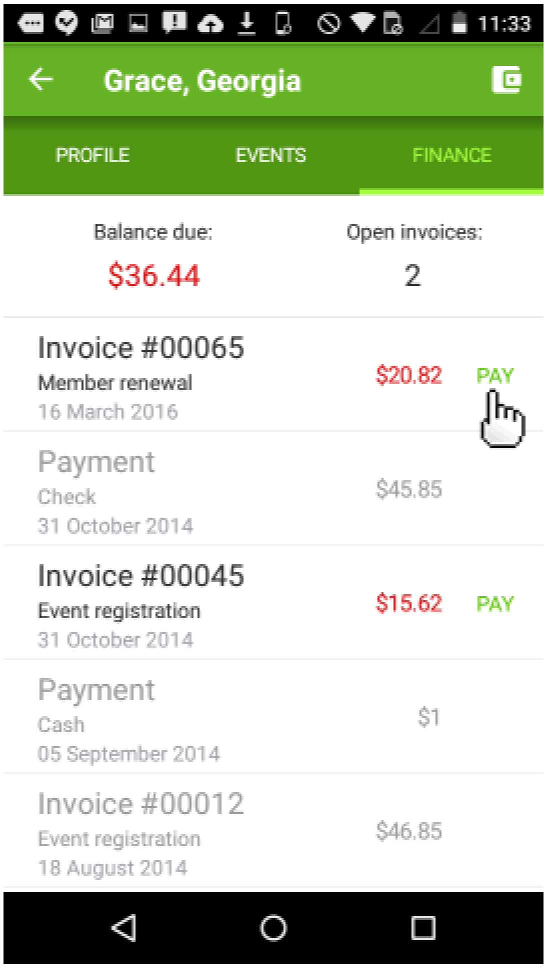
Paying an outstanding invoice

If a contact has an unpaid balance, the amount will be appear in red beside their name in contact lists and event registration lists. Using the Wild Apricot app, you can record a manual payment toward the balance.

You cannot record an online payment using the Wild Apricot app. However, your contacts can view your site using a browser on a mobile device and make an online payment while signing up for membership or an event, or through their member profile.

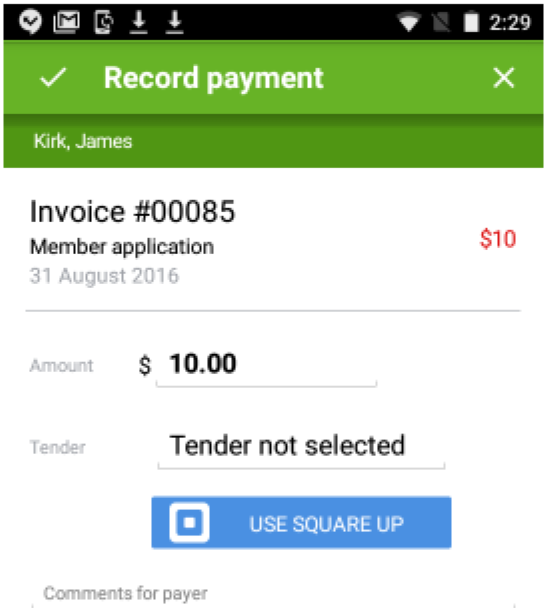
To record a manual payment towards an outstanding invoice, go to the **Finance** tab for the contact, then tap the **PAY** option beside the invoice you want to pay .



On the **Record payment** screen that appears, you can enter the amount of the payment, select a payment tender, enter a comment for the payer, and record any internal notes. Once you are finished recording the payment, tap the check mark.

You cannot apply a previously recorded unsettled payment to an outstanding invoice. You can delete invoices and payments only from the browser version of Wild Apricot.

If you have enabled integration with Square, you can click the **Use SquareUp** button to process a credit card payment for this invoice.



After you click the **Use SquareUp** button, you will be asked for permission to open the Square Point of Sale app. From the Point of Sale app, you enter the credit card number or use the card reader to swipe the card. Once you complete the transaction within the Point of Sale app, you will be returned to your Wild Apricot app, and the payment details will be recorded in your Wild Apricot account. Within the payment details, the Square Up transaction ID will be recorded in the internal notes.

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Events module

Within the Events module, you view event details, manage event registrations, and check in event attendees.

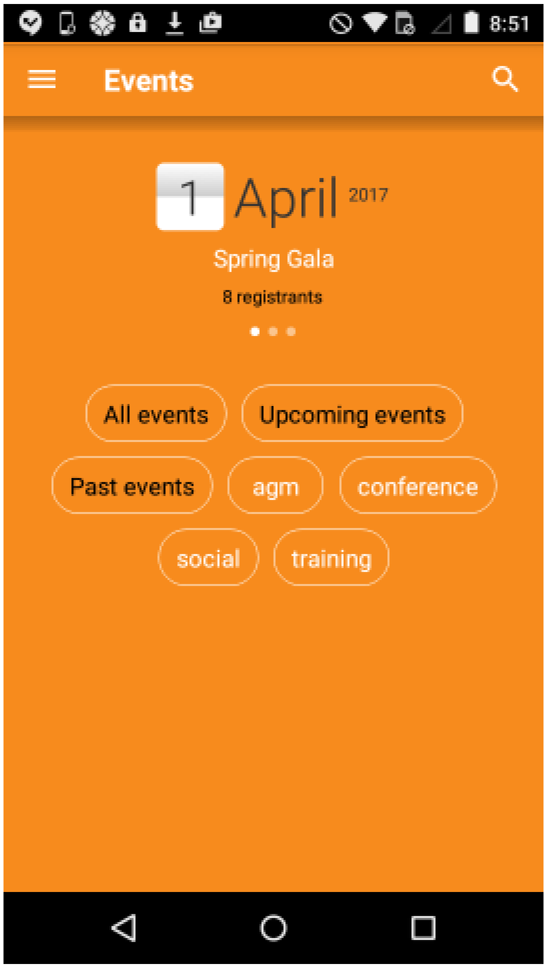
What can't you do within the events module?

- Customize registration forms
- Set up event emails
- Add new event tags
- Add, remove, or modify separate guest registrations

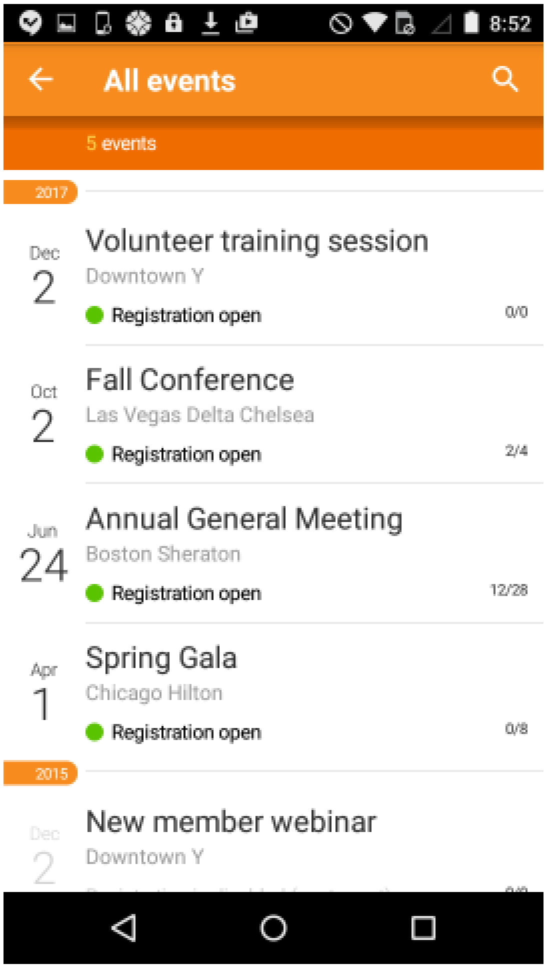
To jump to the Events module, swipe from the left and tap **Events** within the menu that appears.

Viewing events

The Event module groups your events into a number of categories. In addition to the **All events** option, events are grouped into upcoming and past events, and by event tag.

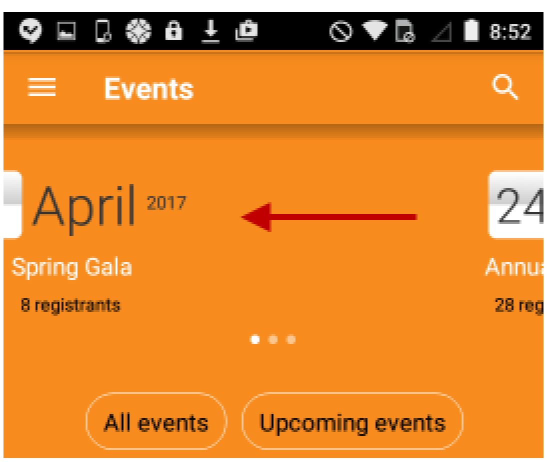


Tapping one of these event categories will display the events grouped under that category.



For each event, the list displays its title, starting date, location, registration status, and the number of checked in registrants vs. total registrants. A green dot indicates that the event is open for registration. Red text will appear if the event is restricted to administrators, selected membership levels, or selected member groups. Past events are marked with a gray starting date.

The next upcoming event with registration enabled appears at the top of the Events module. You can tap this event to view its details, or swipe left to scroll through all upcoming events with registration enabled.



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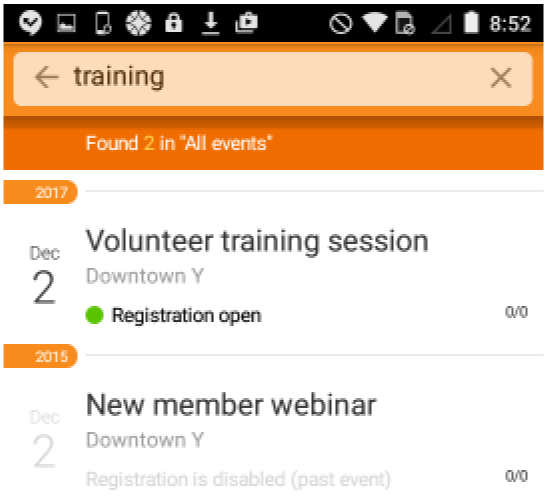
Searching for events

To search for events, tap within the search box on an event list then enter a search string. After you tap the search icon, the current list will be filtered by the search string.

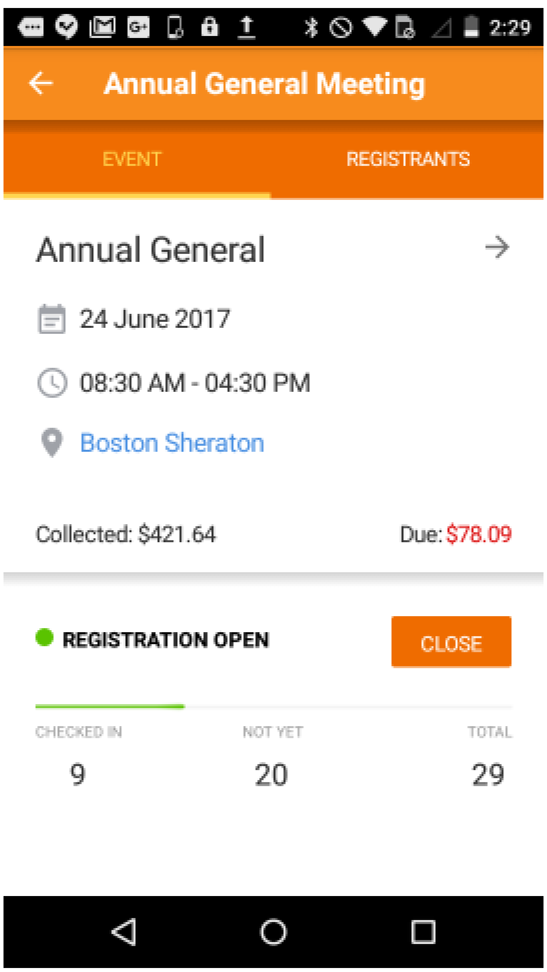


Events whose title, description, location, or tag includes the search string will be displayed.

To remove the search filter, tap the left arrow beside the search string.

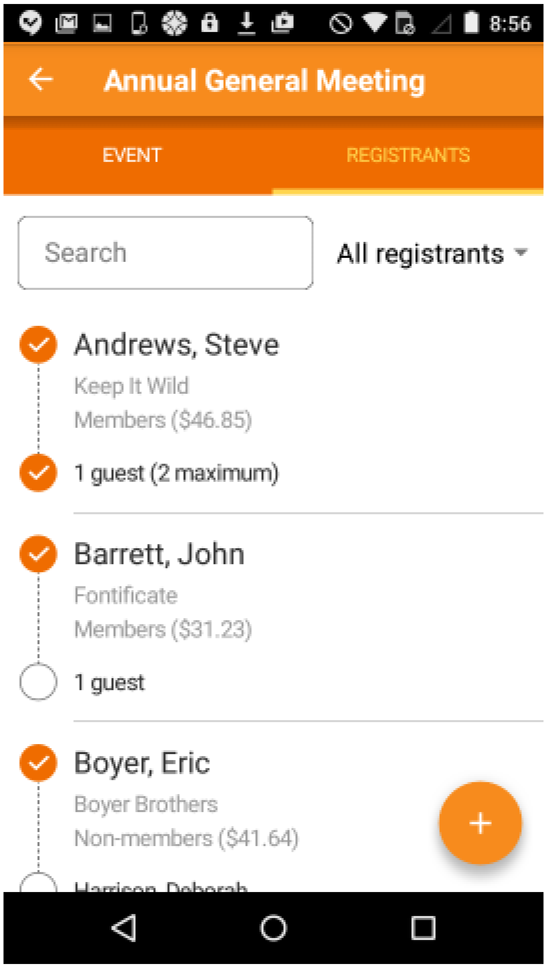
Viewing event details

To view the details of an event, tap the event within the list. Event details include the name, location, and starting date of the event, the number of checked in registrants, the total number of registrants (including guests), the collected event fees, and the outstanding event fees.



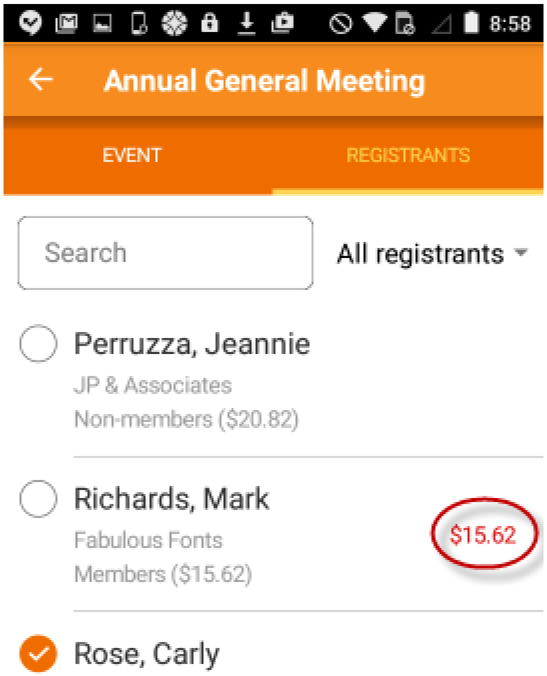
To view the event description, tap the event title. To open or close the event for registration, click the button to the right of the registration status.

The list of registrants appears on the **Registrants** tab.



For each registrant, the list displays the name, organization, registration type, the name(s) or number of guests (depending on whether contact information or separate registrations are required for guests under this registration type), and their checked-in status.

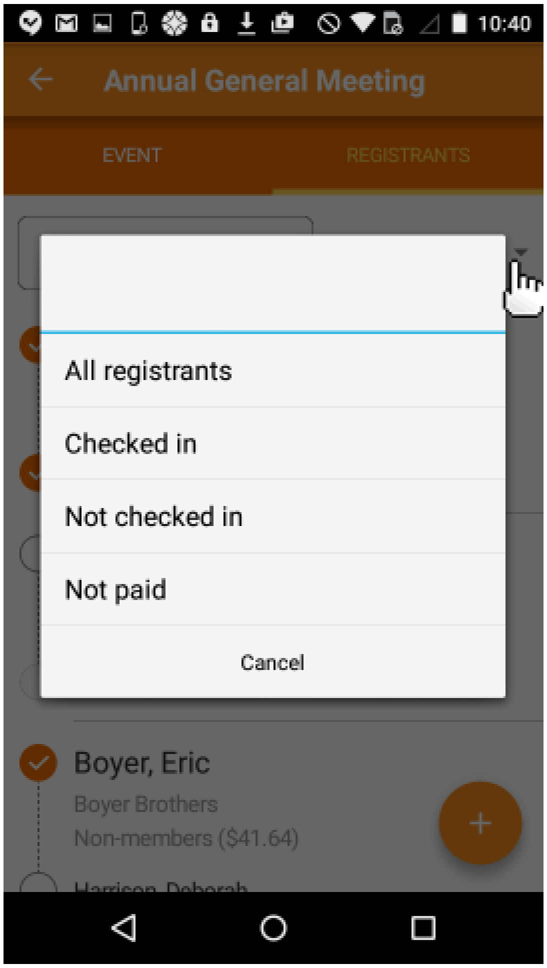
If the registration fee has not been fully paid, the outstanding balance will appear in red to the right of the registrant's name.



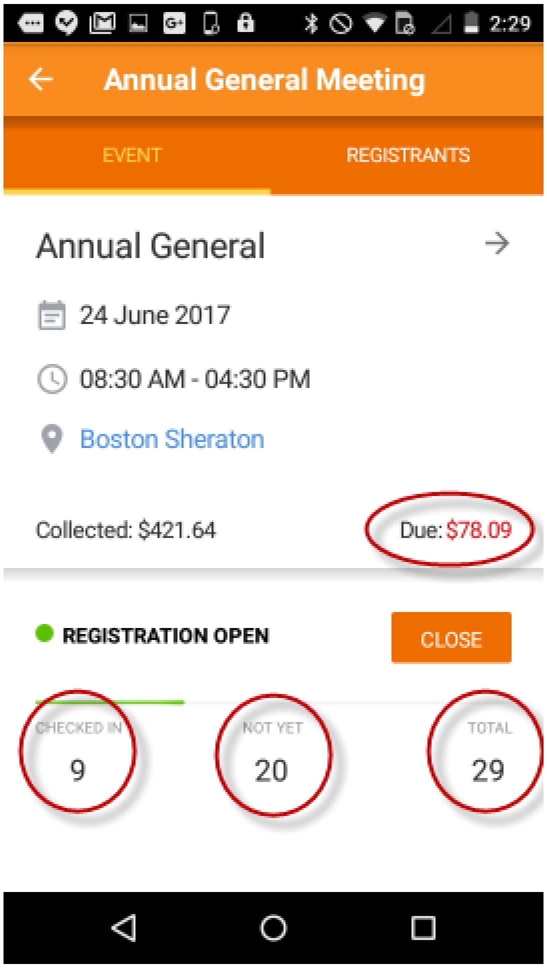
To record payment of the outstanding balance, tap the registrant's name within the registration details. On the screen that appears, you can tap **P AY** to record the payment.

Filtering the registrants list

You can filter the registrants list by tapping the **All registrants** dropdown and selecting a filter from the menu that appears.



You can also jump to a filtered registrants list by tapping on the totals appearing the event details screen.



Searching for event registrants

To search for a registrant, tap within the search box at the top of the screen then enter a search string and tap the search icon.

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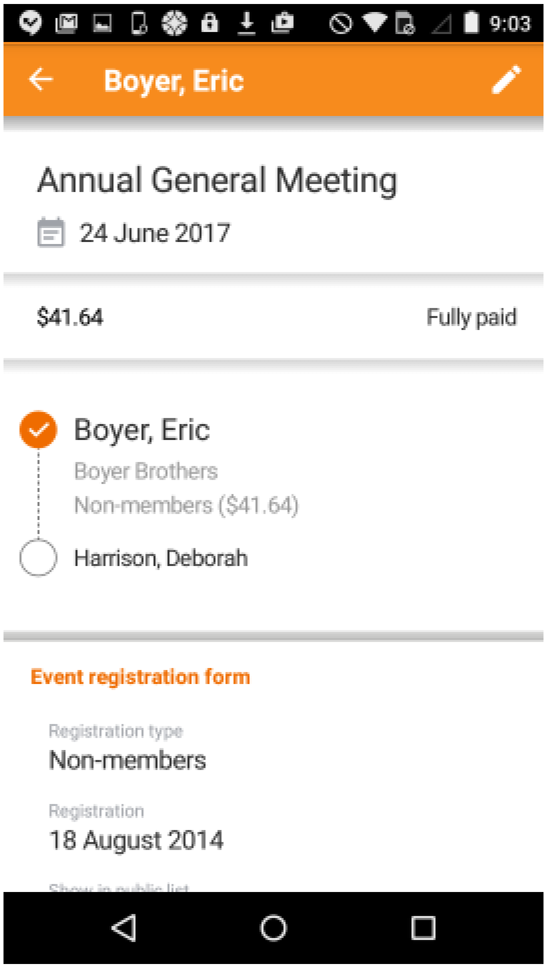
Viewing and modifying a registration

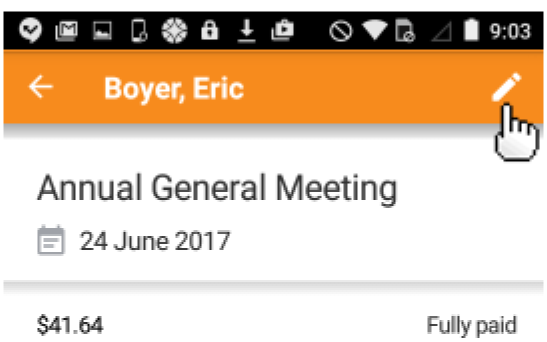
To view the details of a particular event registration, tap the registrant's name within the list. The registration details include all information entered on the event registration form.



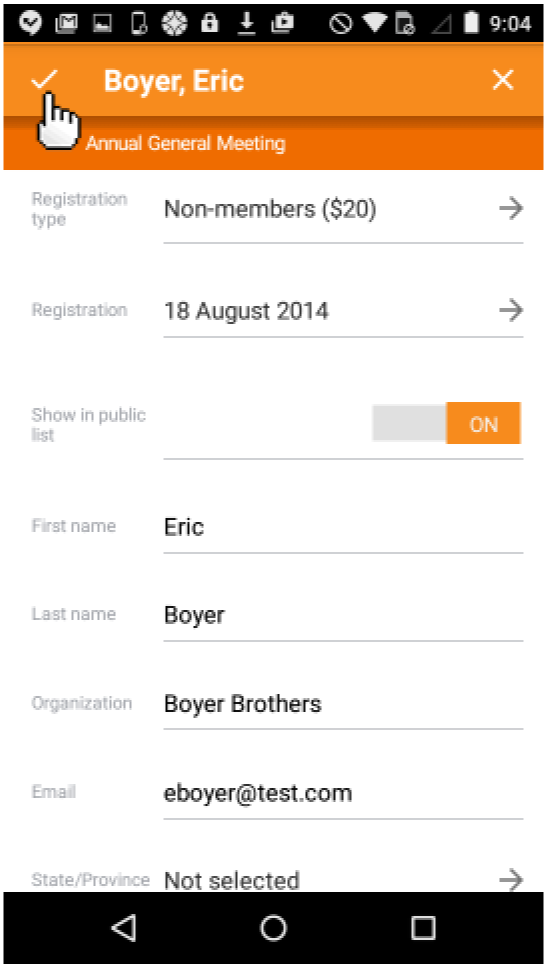
If the registration fee has been paid, the phrase **Fully paid** will appear. If the fee is unpaid, the outstanding amount will be displayed in red.

When you tap the outstanding amount within an event registration, you'll go to the **Record payment** screen where you can tap the **PAY** button and record a manual payment toward the registration fee.

To modify the event registration details, tap the pencil icon at the top right of the screen.



You can then modify the information appearing on the event registration form. You cannot add, modify, or delete separate guest registrations, but you can change the number of guests if the registration type does not require contact information for guests. Once you have finished making your changes, tap the check mark.



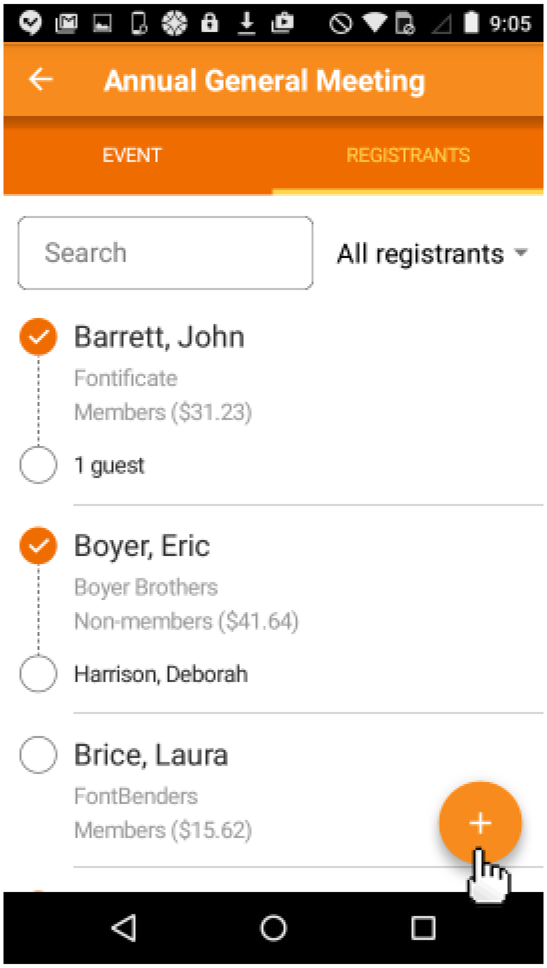
return to top

Deleting an event registration

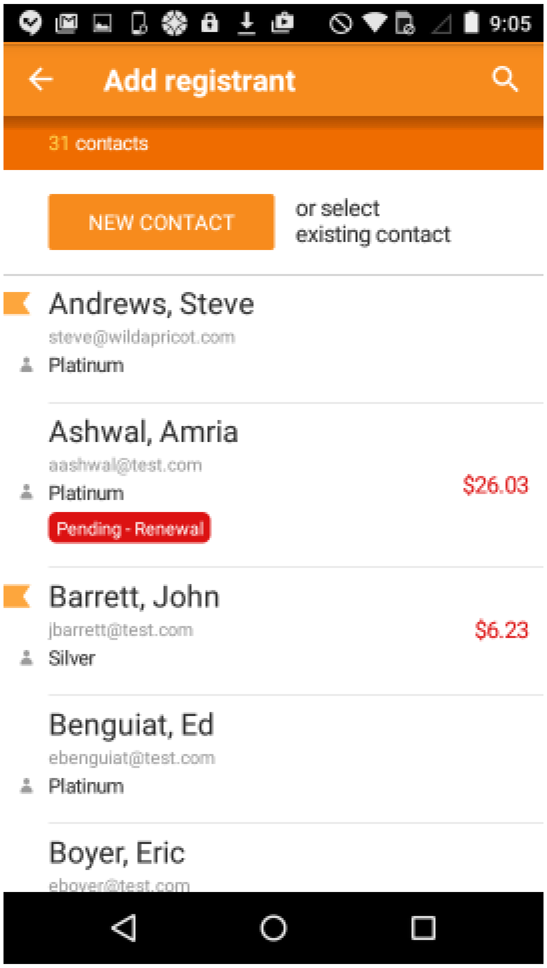
To delete an existing event registration, scroll to the bottom of the registration details and tap the **Delete registration** button.

Adding a new registrant

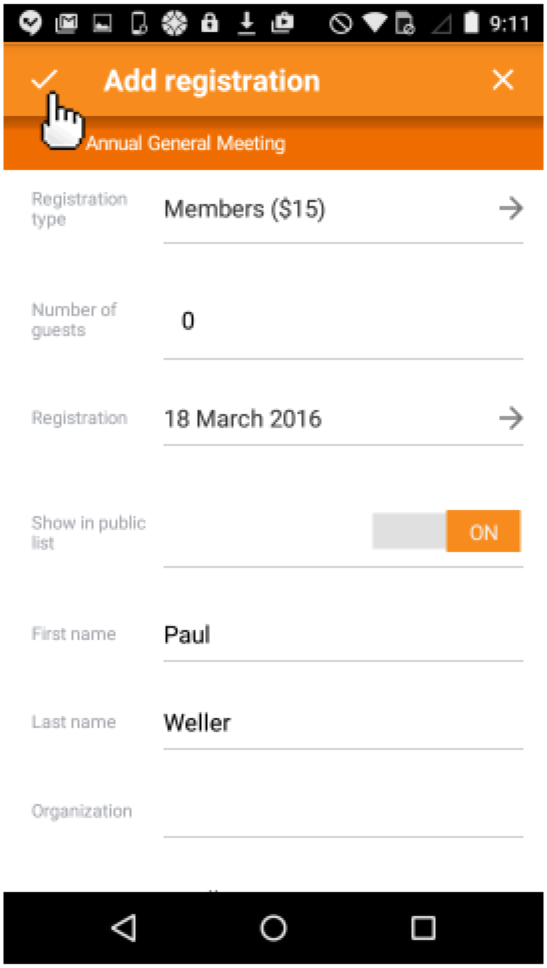
To add a new event registrant, tap the plus sign (+) at the bottom of the **Registrants** tab.



You can register a new contact, or select an existing one.



Next, you complete the event registration form and finalize the registration by tapping the check mark icon.



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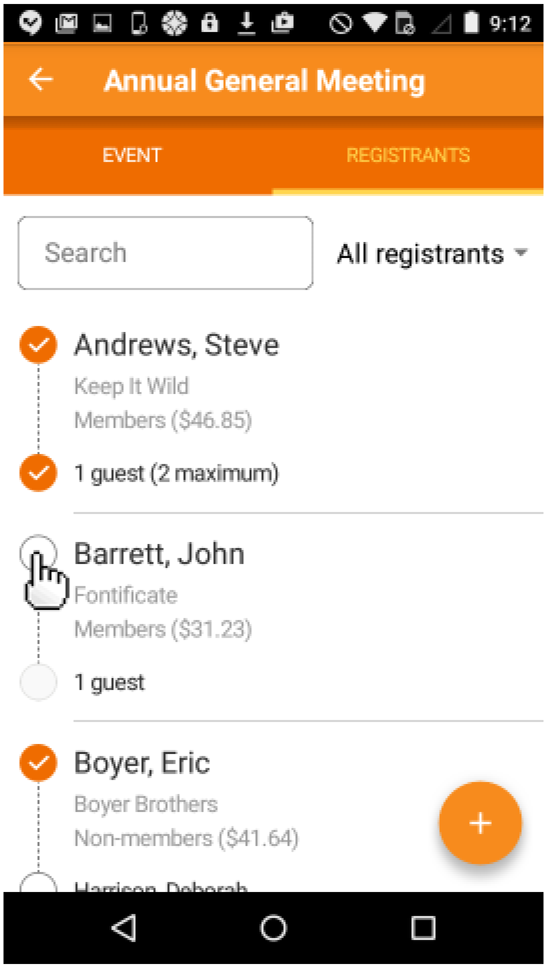
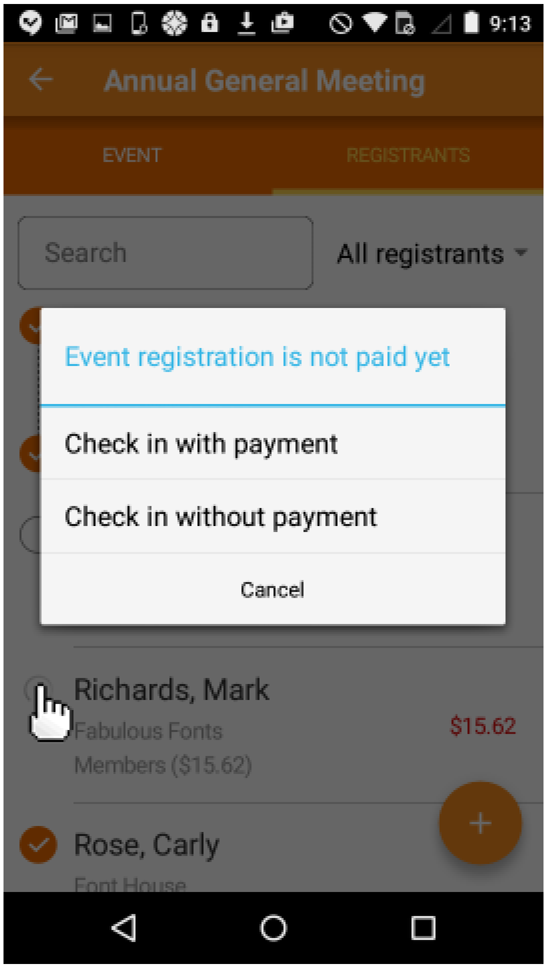
Checking in registrants

To check in a registrant – record their attendance at the event – you tap the check box beside the registrant's name, within the registrants list or within the registration details.

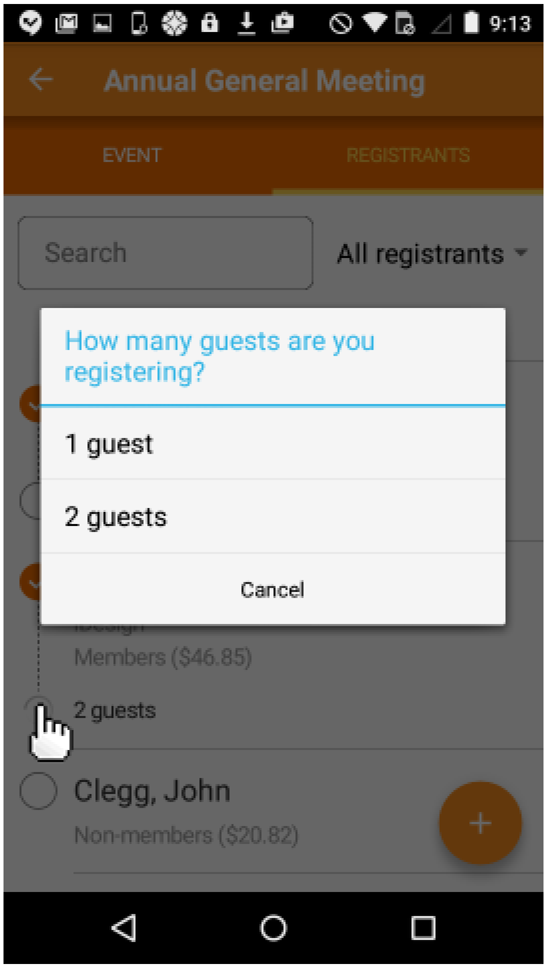


A check mark indicates that the registrant has been checked in. To undo a check in, tap the check mark beside the checked in registrant's name.

If you are checking in a registrant who hasn't fully paid the registration fee, you will be asked whether you want to check in the registrant with or without payment.



To check in a single guest, tap the open circle beside the name of the guest or the number of guests (depending on your guest registration settings). If there are multiple guests without contact or registration information under a particular registration, you tap the open circle then select the number of guests to be checked in.

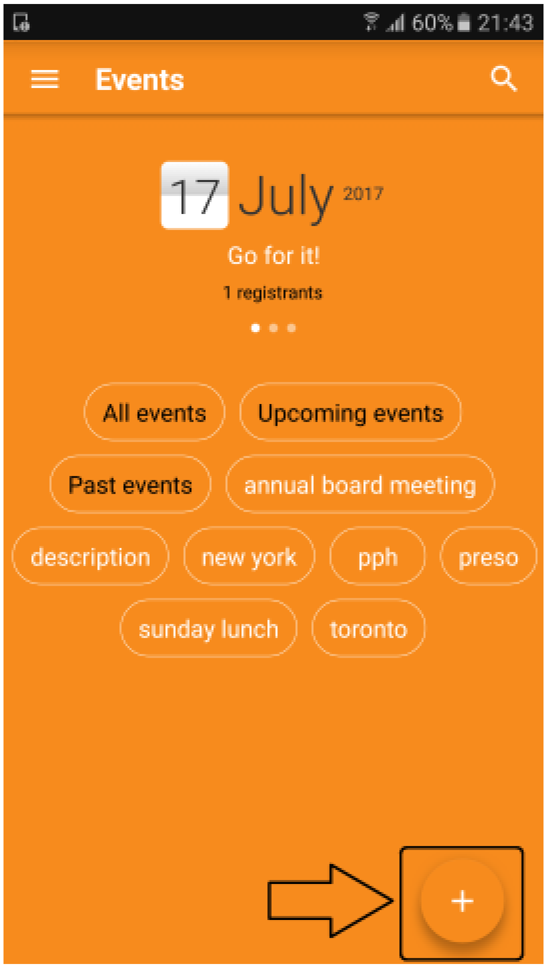


Adding an event

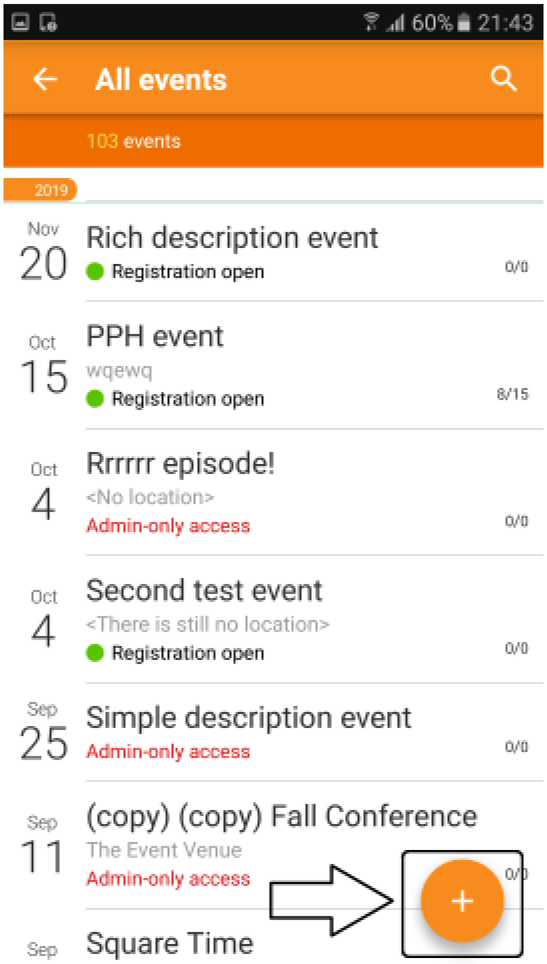
You can add events from the Wild Apricot mobile app, but there are some limitations. While adding an event from the app, you cannot:

- Customize the registration form
- Set up event emails
- Use the content editor to format the event description
- Add new event tags
- Create multisession events
- Customize event timezone
- Modify registration message
- Manage waitlist

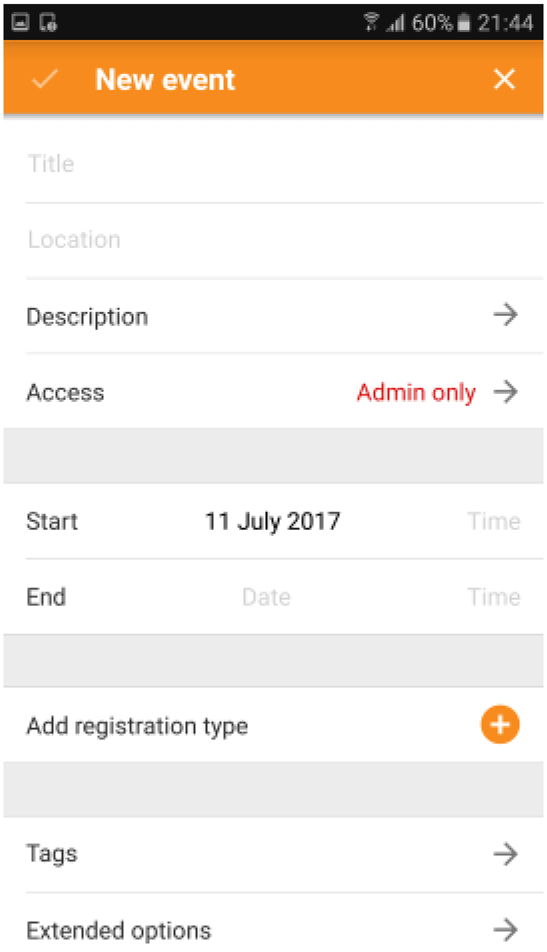
To add a new event, tap the + sign at the bottom of the Events dashboard...



...or at the bottom of the events list.

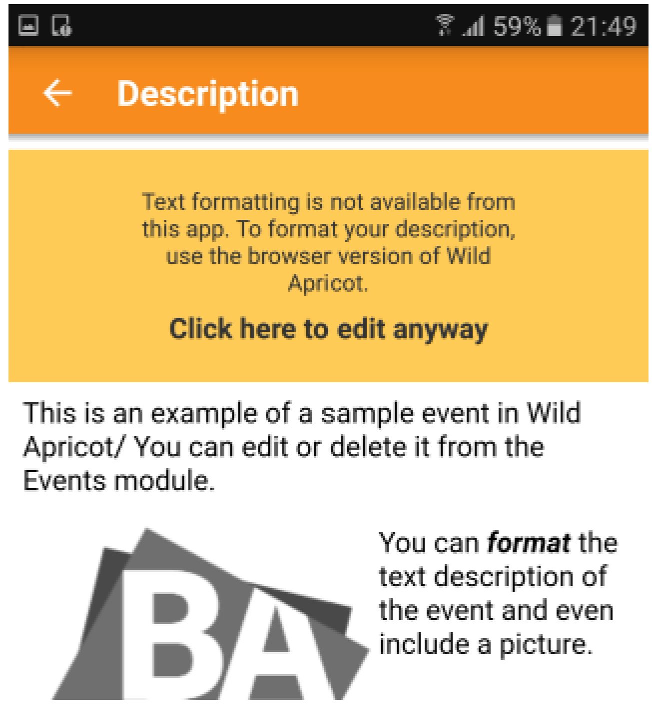


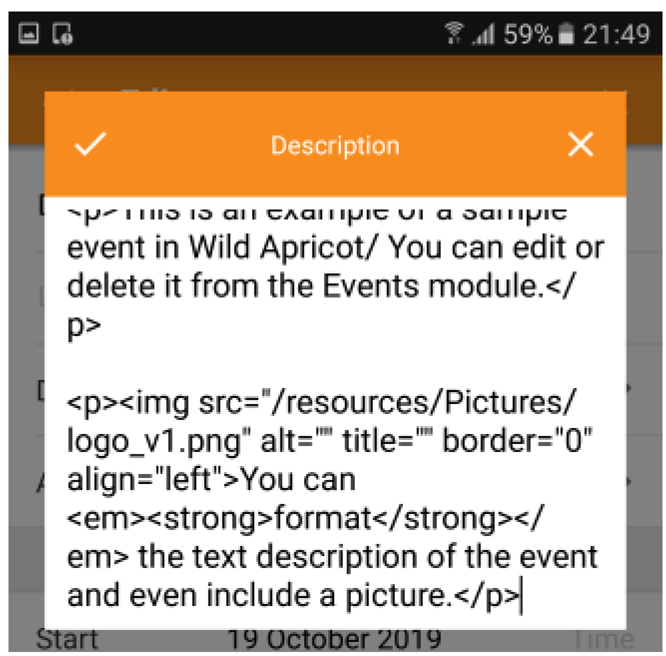
In either case, the **New event** screen will appear.



From here, you can specify the following information. You must specify a title and a start date before you can save the event.

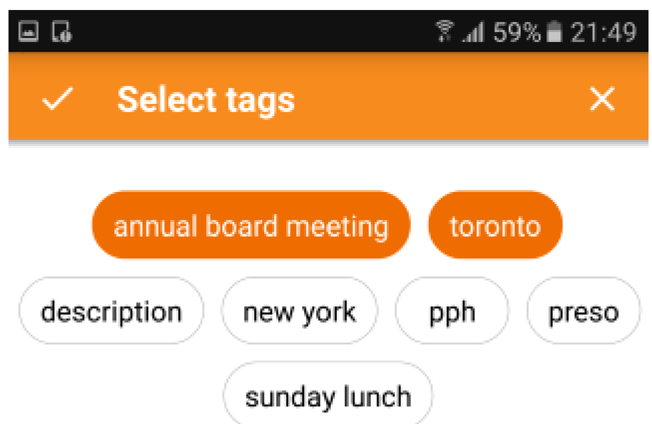
Field	Description
Title	(*Required*) The name of the event as it will appear to visitors on the event calendar and upcoming events gadgets.
Location	Location of the event. This will appear on event calendars and upcoming events gadgets.

<table>
<tr>
<td>Description</td>
<td>Description of the event. To format the description text, you cannot use the content editor available from the browser version of Wild Apricot. Instead, you can format the text using basic HTML markup code. If rich text formatting was already applied to the event description using the browser version of Wild Apricot, the following warning will appear:


If you tap the yellow bar, the description will appear formatted with HTML code, which you can modify and save.


</td>
</tr>
</table>

<table>
<tr><td>Access</td><td>Controls who can view this event on an event calendar or via a direct link . You can make this event public, restrict the visibility of the event by membership level, member groups, or limit access to administrators only. If you restrict access by both membership levels and membership groups, then members who belong to any of the selected levels or groups will be able to view the event. If you check the All levels or All groups option then all levels or groups – including any levels or groups added in the future – will be selected.</td></tr>
<tr><td>Start</td><td>The event's start date and time. The start date is required but the start time is optional. The date format is based on your organization settings.</td></tr>
<tr><td>End</td><td>The event's end date and time. The date format is based on your organization settings. The end date is not displayed if it's the same as the start date.</td></tr>
<tr><td>Registration types</td><td>The registration types available for this event. Registration are like ticket types. To add a registration type, tap the Add registration type option. After you've added a registration type, you can modify it by tapping its name within the list of registration types. For each registration type, you can specify the following options:
<table>
<tr><th>Option</th><th>Description</th></tr>
<tr><td>Name</td><td>(Required) Name used to identify the registration type (e.g. Non-member or VIP seating). This will be displayed to the registrant when asked to choose the registration type.</td></tr>
<tr><td>Limit</td><td>The maximum number of registrations allowed for this registration type. Leave this field blank if you don't want to set any limit. An overall registration can also be set for the event itself.</td></tr>
<tr><td>Price</td><td>Base price for this registration type. This does not include any additional event options available for a separate cost.</td></tr>
<tr><td>Description</td><td>Description of the registration type.</td></tr>
<tr><td>Enabled</td><td>Controls whether the registration type is active and available.</td></tr>
<tr><td>Available from / Available to</td><td>Controls when this registration type is available. You can set a From date, a Through date, or both. Leave both fields blank if you don't want to set a date limit. Registration will remain open from 12:00 am on the From date, until 12:00 pm on the Through date.</td></tr>
</table></td></tr>
</table>

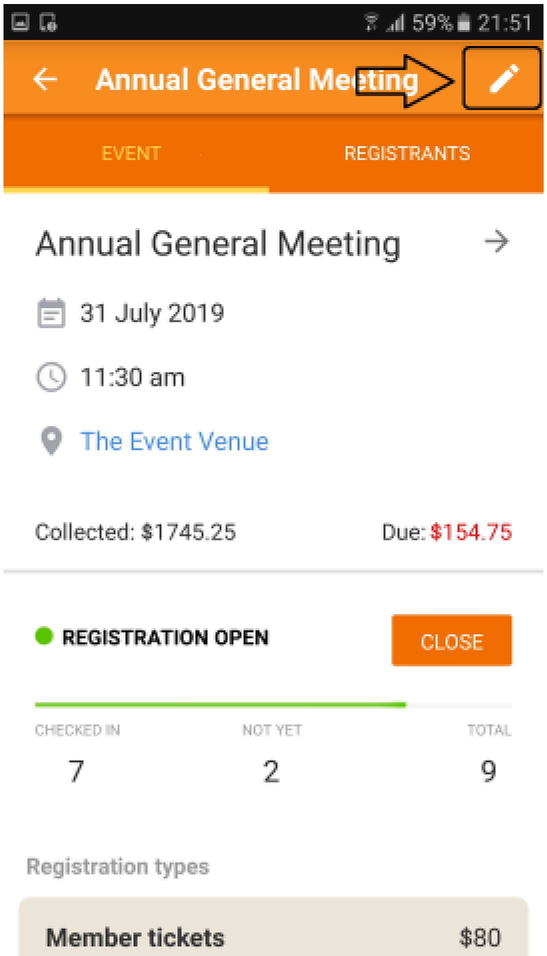
<table>
<tr><td></td><td>
<table>
<tr><td>Availability</td><td>Controls whether this registration type is available to everyone, just certain membership levels, or to anyone with the registration code you specify. Using registration codes allows you to offer discount pricing to selected people.</td></tr>
<tr><td>Guest policy</td><td>If guest registration is enabled, registrants can register guests at the same time that they submit their own registration. You can control whether to collect contact information for each guest, collect full registration information for each guest, or just ask for the total number of guests. Unless you choose to collect full registration information for each guest, you can charge a special guest price for the event.</td></tr>
</table>
</td></tr>
<tr><td>Tags</td><td>Labels used to categorize events . You can only choose from existing tags. You cannot add a new event tag from this app. Selected tags will appear on the Select tags screen with an orange background.


To select or deselect a tag, tap it.</td></tr>
</table>

Extended options	<table><tr><th>Option</th><th>Description</th></tr><tr><td>Overall limit</td><td>The overall limit on the total number of registrations for the event. After the event registration limit is reached, the registration will be closed and an email will be sent to the event organizer. On your event calendar page, visitors will see that the event is closed for registration, and that there are no spaces left. You can also set registration limits for individual registration types.</td></tr><tr><td>Multiple registrations</td><td>Controls whether contacts can register multiple times for the same event. When multiple registrations are disabled at the event level, this option will not be available for individual registration types.</td></tr><tr><td>Payment info</td><td>The payment instructions that appear on the payment confirmation screen.</td></tr><tr><td>Show registrants</td><td>If you enable this option, a Registered link will appear for the event on the event calendar and on the event details. With this option enabled, you can control whether the registrants list is visible to all visitors or just members, and whether the list includes pending registrations (for which payment has not yet been received)</td></tr></table>

Modifying an existing event

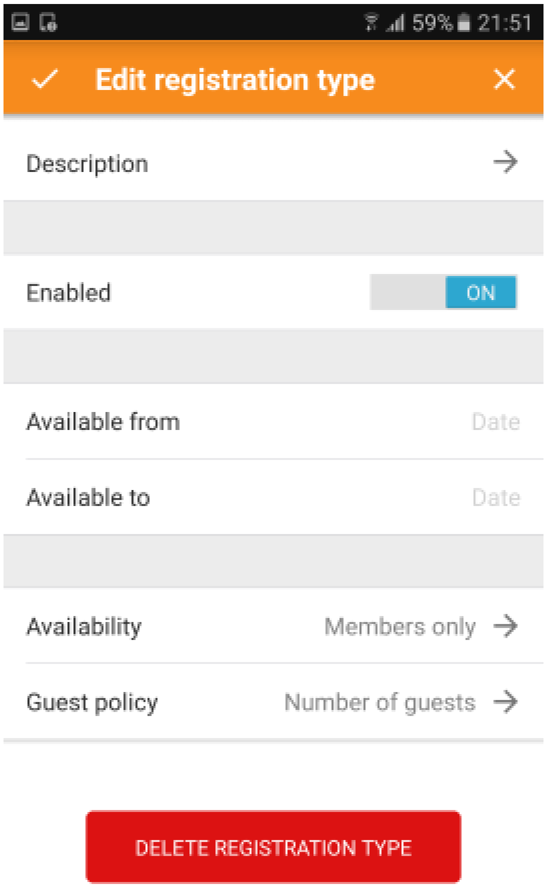
To modify an existing event, tap the **Edit** option at the top of the event details screen.



Deleting a registration type

You can delete a registration type if someone hasn't already registered using that registration type. To delete a registration type, follow these steps:

1. Begin editing the event.
2. Tap the registration type within the **Edit event** screen.
3. Scroll down to the bottom of the **Edit registration type** screen.
4. Tap the **Delete registration type** button.

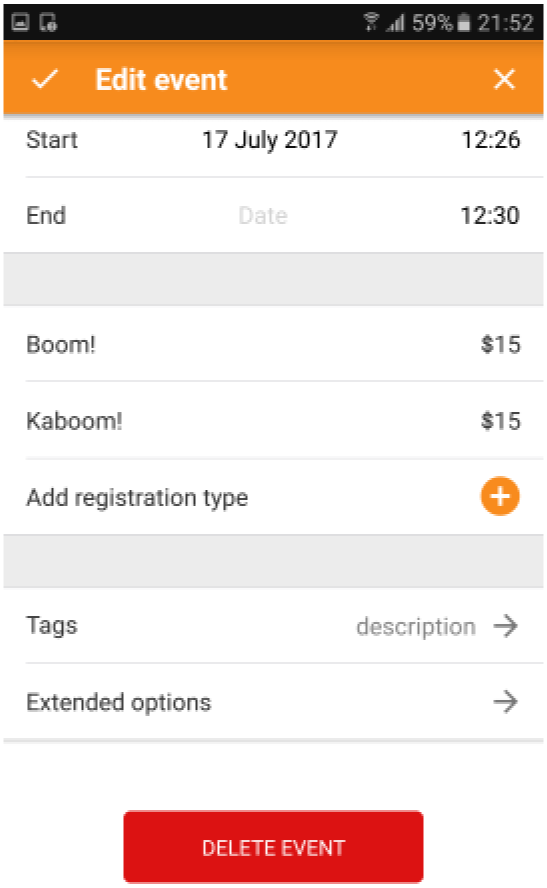


5. Tap the **OK** button if you are sure you want to delete this registration type.

Deleting an event

You can delete an event if there are currently no registrants for the event. To delete an event, follow these steps:

1. Begin editing the event.
2. Scroll down to the bottom of the **Edit event** screen.
3. Tap the **Delete event** button.



4. Tap the **OK** button if you are sure you want to delete this registration type.

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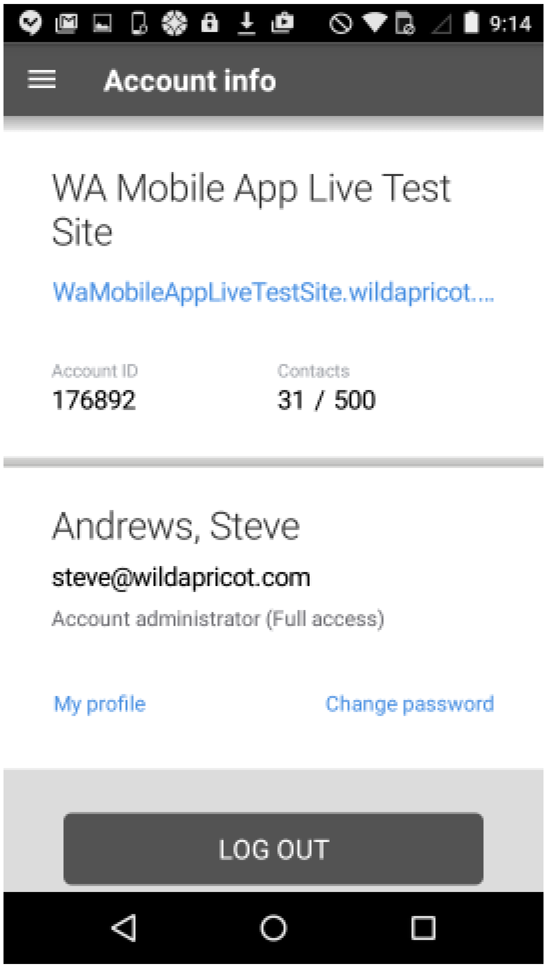
Account module

From the Account module, you can log out of the app, and change your account password. You can also tap your website URL to view the site in a browser.

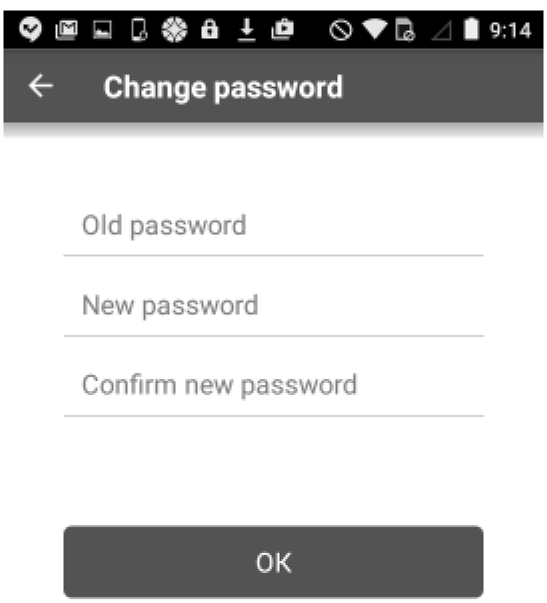
To jump to the Account module, slide left to right from any screen and tap the **Account** option that appears on the left.

To log out of your Wild Apricot account, swipe from the left and tap **Log out** within the navigation menu that appears.



You will be returned to the Login screen.

To change your Wild Apricot account password, tap the **Change password** button from the Account screen. On the **Set new password** screen, you can enter and save a new password.



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Known issues

There are no known issues in latest version of the apps.

Releases history

We've published 12 updates of our mobile app so far:

- Mobile 2.1 — Mobile 2.1 – August 17, 2017 (both iOS and Android)
- Mobile 2.0 — Mobile 2.0 – July 24, 2017 (both iOS and Android)
- Mobile 1.8 — Mobile 1.8 – Released on May 25, 2017 (both iOS and Android)
- Mobile 1.7 — Mobile 1.7 – Released on March 13, 2017 (both iOS and Android)
- Mobile 1.6 — Mobile 1.6 – Released on December 30, 2016 (both iOS and Android)
- Mobile 1.5 — Mobile 1.5 – Released on December 2, 2016 (both iOS and Android)
- Mobile 1.4 — Mobile 1.4 – Released on September 8, 2016 (both iOS and Android)
- Mobile 1.3 — Mobile 1.3 – Released on April 4, 2016 (both iOS and Android)
- Mobile 1.2 — Mobile 1.2 – Released on October 21, 2015 (both iOS and Android)
- Mobile 1.1 iOS — Mobile 1.1 iOS – Released on July 8, 2015
- Mobile 1.0 Android — Mobile 1.0 Android – Released on March 23, 2015
- Mobile 1.0 iOS — Mobile 1.0 iOS – Released on September 15, 2014

Contacting support

If you can't find answers to your questions, you can contact our support department for assistance, free of charge. For contact options, slide left to right from any screen and tap the **Contact us** option that appears on the left. The **Contact us** screen displays links to contact us by phone or email, or to submit a support request. When you submit a support request, you provide details of your question or issue, which can lead to a faster response time.

Accepting mobile payments using Square

Accepting mobile payments using Square

- What you need to get started
- Enabling Square integration
- Setting up the Square POS app
- Using Square to accept payments
- Frequently asked questions

> ⚠ Square integration is not available for free accounts.

Using Wild Apricot's mobile app and Square's Point of Sale app (formerly Register), you can accept credit card payments from your mobile device and record those payments in your Wild Apricot account. Square provides financial processing services and a card reader attachment for mobile devices.

> ⚠ You can only use Square to record a one-time manual payment. You cannot set up recurring payment profiles using Square.

What you need to get started

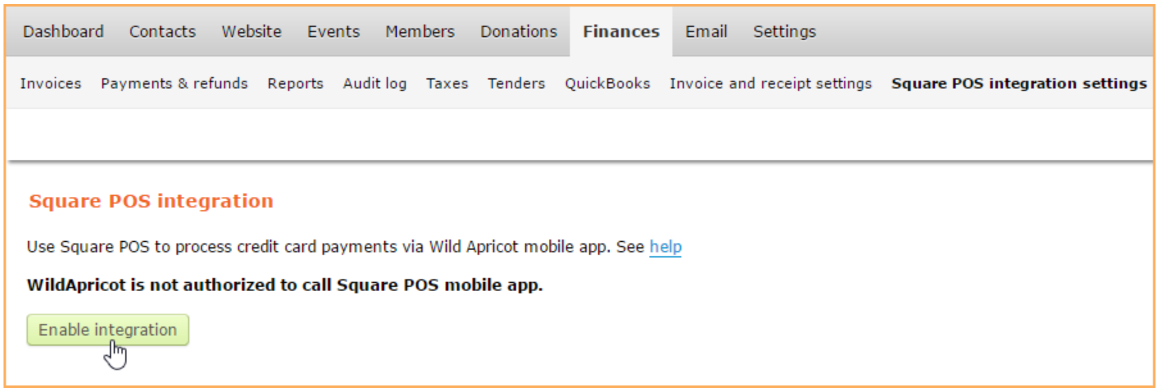
- a Wild Apricot account
- the Wild Apricot mobile app on iOS or Android
- a Square account
- Square's Point of Sale app (formerly Register)

Enabling Square integration

Before you can use Square to accept payments from your Wild Apricot app, you need to enable Square integration within your Wild Apricot account. To enable Square integration, follow these steps:

1. From a browser, log into your Wild Apricot account as a full administrator.
2. Under the **Finances** menu, select the **Square POS integration settings** option.

3. On the screen that appears, click the **Enable registration** button.



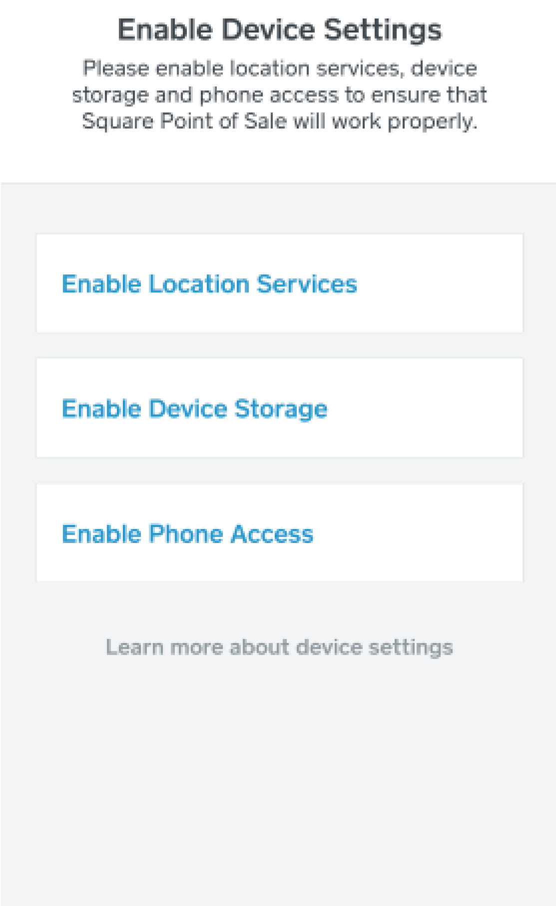
4. When prompted, log into your Square account.

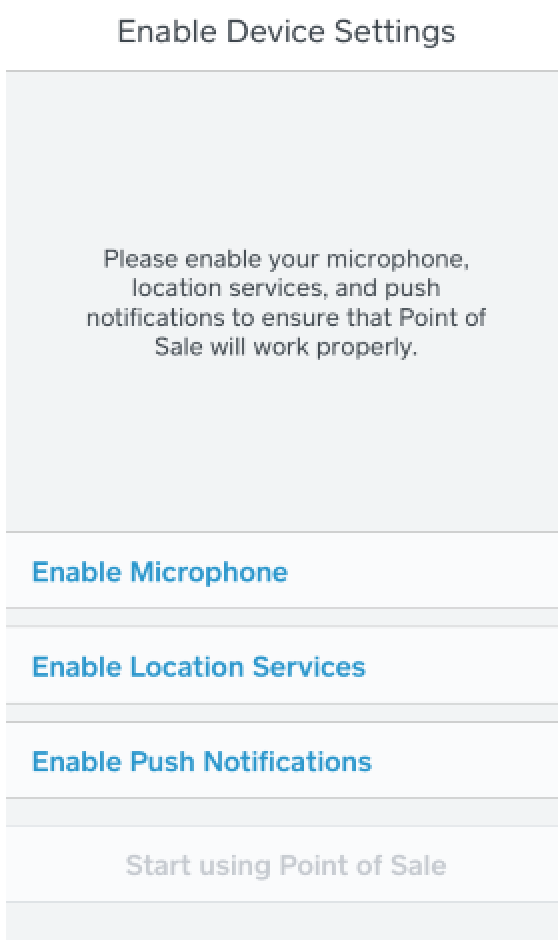
Once you log into your Square account you will be returned to Wild Apricot and the **Enable integration** will be replaced by a **Disable integration** button, which you can use to disable Square integration.

Setting up the Square POS app

After you've installed the Square POS app for [Android] or [iOS] on your mobile device, you need launch the app and log into your Square account.

When you first launch the Square POS app, you'll be asked to enable various device settings.





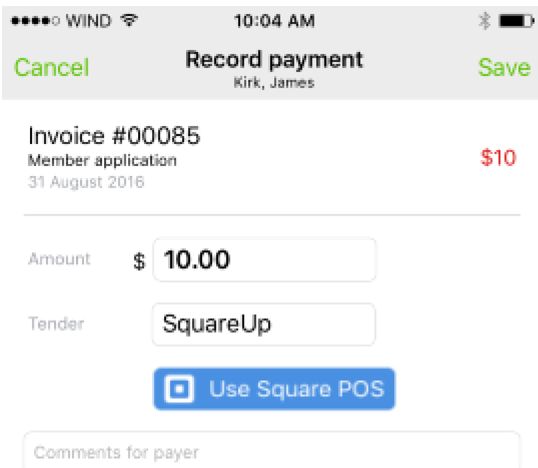
You should enable each of these settings.

Do not enable the **Skip receipt** option within your Square settings. Enabling this option will prevent Wild Apricot from receiving a payment confirmation from Square.

Once you are finished, you will be taken to the main Square POS screen, at which point you can close the Square POS app.

Using Square to accept payments

Now that you have enabled Square integration, you can accept credit card payments from your Wild Apricot mobile app. When you click the **Pay** button from a contact's **Finances** tab, a **Use Square POS** button will appear on the **Record payment** screen.



You can click the **Use Square POS** button to process a credit card payment for this invoice using Square. After you click this button, you will be asked for permission to open the Square Point of Sale app. From the Point of Sale app, you enter the credit card number or use the card reader to swipe the card. Once you complete the transaction within the Point of Sale app, you will be returned to your Wild Apricot app, and the payment details will be recorded in your Wild Apricot account. Within the payment details, the Square Up transaction ID will be recorded in the internal notes.

Refunds processed through Square for payments made via the Wild Apricot app will not be automatically recorded in your Wild Apricot account.

Frequently asked questions

Can I set up recurring payments using Square POS?
No. You can only use Square POS to record a one-time manual payment.

Can I use Square to accept payments on the browser version of my Wild Apricot site?
No, Wild Apricot sites can only accept payments using Square from the Wild Apricot mobile app.

Is the Square POS app available worldwide?
No. Currently, you can only use the Square POS app in the US, Canada, UK, Japan, and Australia, though Square plans to support additional locations.

How much fee do you charge per transaction?
Wild Apricot does not charge any fees, but Square does. It's a 2.75% for swiped transactions and 3.5% + 15 cents for manually entered cards. For more details about Square's fees, see here.

What our members/registrants need to do to make a payment?
They only give you their credit card or card details. The payment requires no additional actions from the cardholder.

Accepting mobile payments using PayPal Here

Accepting mobile payments using PayPal Here

- What you need to get started
- Using PayPal Here to accept payments
- Frequently asked questions

PayPal Here integration is not available for free accounts.

Using Wild Apricot's mobile app and the PayPal Here app, you can accept credit card payments from your iOS device and record those payments in your Wild Apricot account. PayPal provides financial processing services and a card reader attachment for mobile devices.

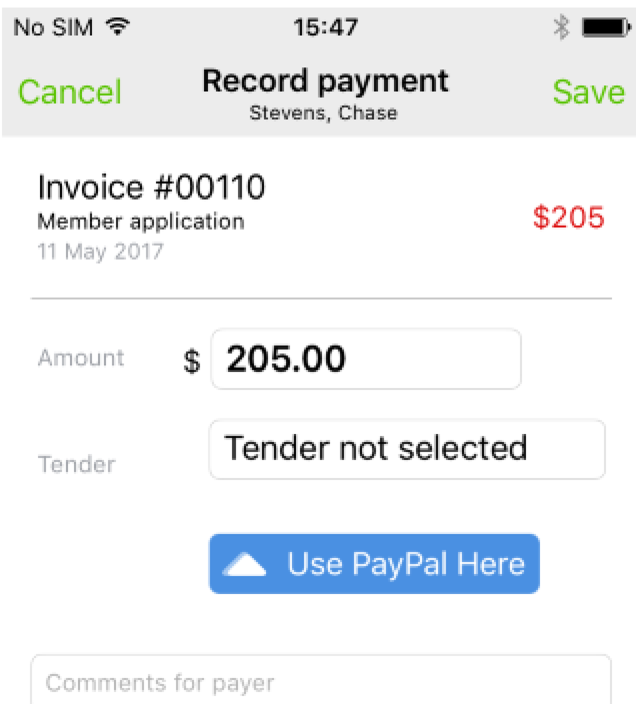
You can only use PayPal Here to record a one-time manual payment. You cannot set up recurring payment profiles using PayPal Here.

What you need to get started

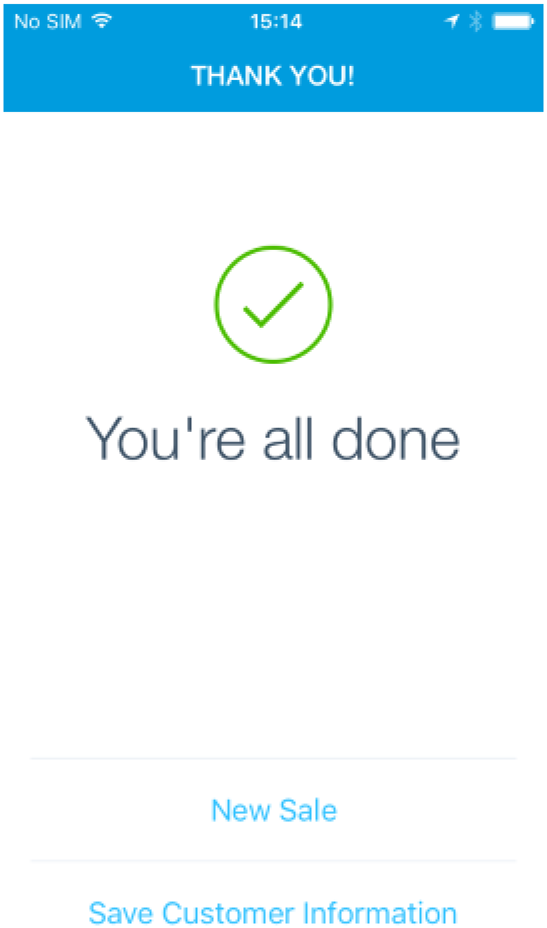
- a Wild Apricot account
- the iOS version of the Wild Apricot mobile app
- a verified PayPal business account
- the PayPal Here app

Using PayPal Here to accept payments

Once you've installed the PayPal Here app on your mobile device, you can use it to accept credit card payments from your Wild Apricot mobile app. When you click the **Pay** button from a contact's **Finances** tab, a **Use PayPal Here** button will appear on the **Record payment** screen.



You can click the **Use PayPal Here** button to process a credit card payment for this invoice using PayPal Here. After you click this button, you will be asked for permission to open the PayPal Here app. From the PayPal Here app, you enter the credit card number or use the card reader to swipe the card. Once you complete the transaction within the PayPal Here app, the following screen will appear.



On this screen, tap the **New Sale** button. You will be returned to your Wild Apricot app, and the payment details will be recorded in your Wild Apricot account. Within the payment details, the PayPal Here invoice ID will be recorded in the internal notes section.

> ⚠ If you don't tap the **New Sale** button, the payment information will not be recorded on your Wild Apricot account.

Refunds processed through PayPal Here for payments made via the Wild Apricot app will not get automatically recorded in your Wild Apricot account.

Frequently asked questions

Do I need to set up PayPal Here integration on my Wild Apricot site?
No. All you need is a verified PayPal Business account and the PayPal Here app installed on your mobile device.

Can I set up recurring payments using PayPal Here ?
No. You can only use PayPal Here to record a one-time manual payment.

Is the PayPal Here app available worldwide?
No. Currently, you can only use the PayPal Here app with US, UK, and Australian-based PayPal business accounts.

How much fee do you charge per transaction?
Wild Apricot does not charge any fees, but PayPal does. PayPal's fees vary depending on the country.
For US: 2.7% - 3.5%, depending on the card type and input method plus some extra charges possible. For more information, click here .
For AU: 1.95% for transactions through the card reader and PayPal check-in payments, and 2.9% + $0.30 for key in card payments. For more information, click here .
For UK: 1.5% - 2.75%, depending on your total monthly sales. For more details, click here (see the “Estimate your PayPal Here fees” section).

Account administration

Account administration

Using the options that appear under the **Dashboard** menu, you can view and update your account and organization information.

- Using the **Account** option, you can change your billing plan and update your billing details.
- Using the **Organization** option, you can view or modify details about your organization, including name, timezone, and email address.
- Using the **Referrals** option, you can earn commissions by referring new users to Wild Apricot.

To manage your site administrators, you go to your contacts' records and edit their login details.

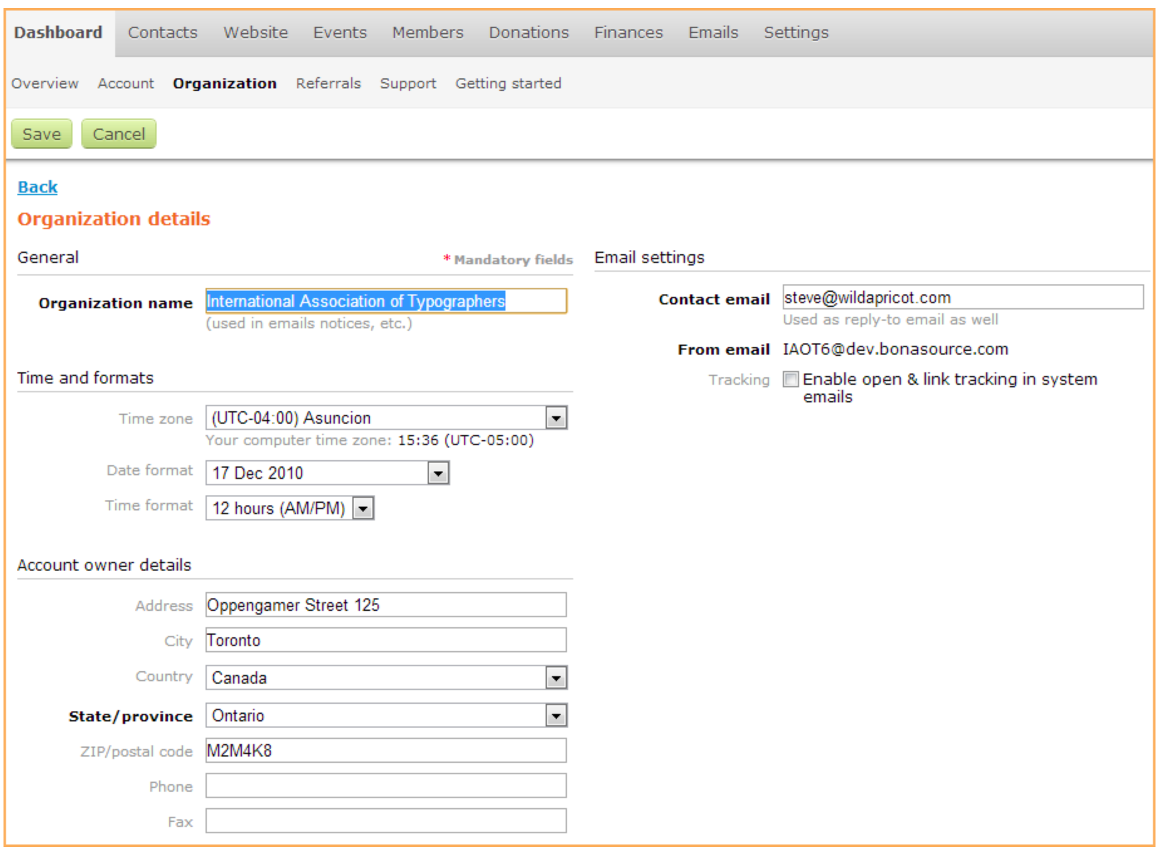
See also:

- Organization details
- Managing site administrators
- Page and field size limits
- Functionality by billing plan
- Changing your billing plan
- Changing your billing details
- Requesting a Wild Apricot payment receipt
- Backing up your data
- Cancelling your account
- Referrals

Organization details

Organization details

You can view or modify details about your organization, including name, timezone, and email address. To view or modify your organization details, hover over the **Dashboard** menu then click the **Organization** option.



You can modify the following organization details.

Organization name

Used in all locations where your organization name is referenced (e.g. email macros), including browser page tabs.

Email settings

Contact email

The default email address to which all admin emails are sent. For information on routing system notifications to other email accounts, see Routing of system e-mails.

The contact email address is also used as the actual Reply-to address for all automatic emails, even if a different From address is displayed (see below).

From email

The email address identified the sender of emails from your Wild Apricot account. When a recipient replies to the email, the contact email address (see above) will be used as the actual Reply-to address.

If you are on a paid plan and have a custom domain set up, you can set the From address to *something* @ your custom domain (e.g. john@your_association.com).

- If you are using *something* @ your custom domain (e.g. john@your_association.com) as the From address, be sure to add your custom domain without *www* as part of the custom domain setup process.
- If you set up a custom domain name without a valid TXT record, the From email address will still be generated from your free domain, and you will not be able to create a custom From address based on your custom domain (see Custom domain setup).

Tracking

The default setting (enable or disabled) for email tracking. Email tracking allows you to track who opens your emails and which links they click on. Regardless of the setting here, you can enable or disable tracking for individual emails.

Opt-in setting

Allows you to enable or disable the opt-in mechanism so that contacts can expressly provide their consent to receive emails from your organization. This is a key component in complying with anti-spam legislation, particularly the Canadian Anti-Spam Law (CASL). With the opt-in mechanism enabled, you can send consent request emails to your contacts, then track their opt-in status from each contact’s **Email settings and log** tab.

Time and formats

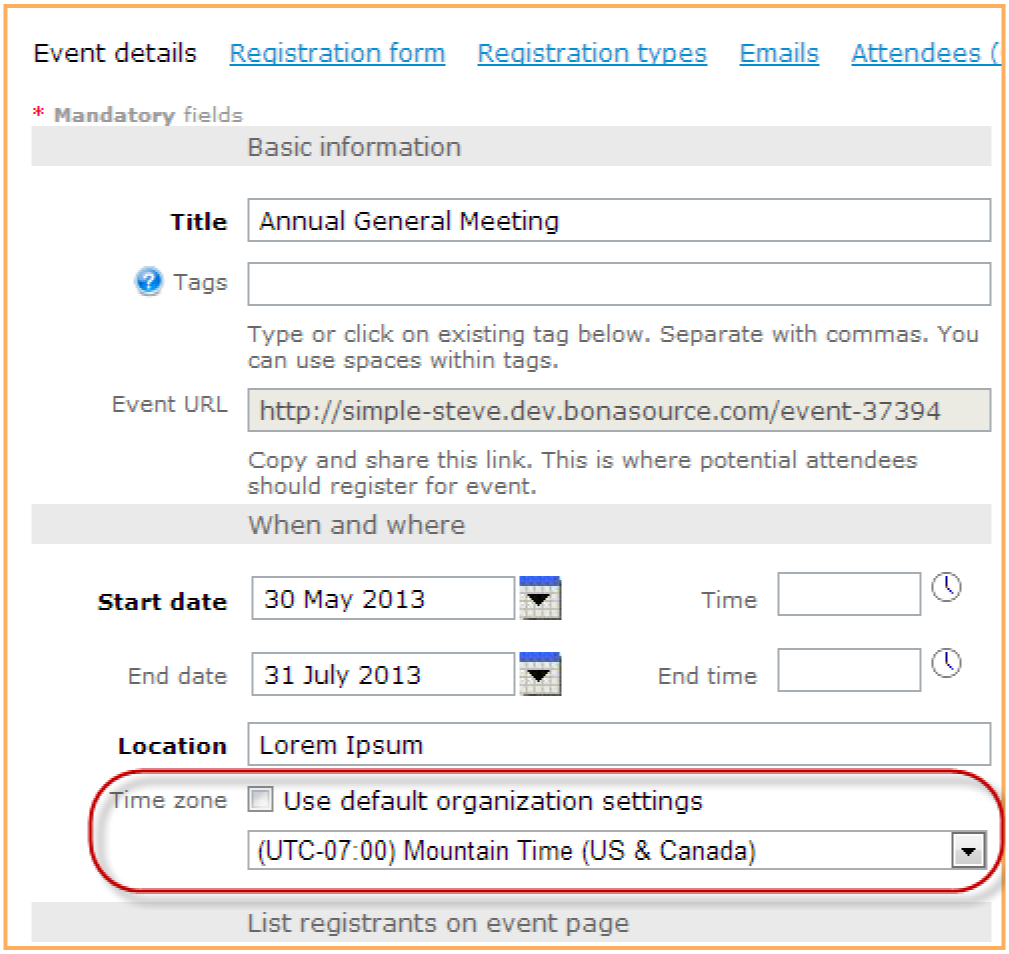
Time zone

Daylight Savings Times is handled automatically based on your location.

Used to schedule the sending of emails and the timing of events. Automatic system emails like event notifications and renewal reminders are sent at a specific time of day relative to your time zone. Event registrations are automatically opened and closed according to the time specified in the event. Unless you customize the timezone for individual events, the time zone specified here will be used.

If you change your time zone after an event has been created, you have to re-save your events again for the new time zone to take effect.

To customize the time zone for an individual event, go to the event details screen and click the **Edit** button. In the **Time zone** section, uncheck the **Use default organization settings** option and select a different time zone for the event.



Date format

Format of dates displayed on your Wild Apricot site.

Time format

The time format used on your Wild Apricot site. You can choose a 12 hour format (with AM and PM) or a 24 hour format.

Account owner details

The address and contact information of the account owner. This information may be used to confirm account ownership.

On this page:

See also:

- Changing your billing details

Managing site administrators

Managing site administrators

Site administrators can perform administrative functions such as modifying site pages, adding events, and customizing the contact database. Administrator can log in and access the admin *backend* – an area reserved for site and account administration, and not seen by ordinary members or visitors to your site.

> Site administrators should not be confused with bundle administrators.

You can designate any contact as an administrator, and grant them full or partial administrative privileges. If you designate a member as an administrator, the member can switch back and forth between admin view and member view. If you designate a contact who is not a member as an administrator, the contact can switch back and forth between admin view and public view. For more information on switching between views, see Switching between admin and public views.

Adding an administrator

You can designate any contact in your database – whether a member or not – as an administrator. If you want to add someone as an administrator who is not in your contact database, simply add them as a non-member contact.

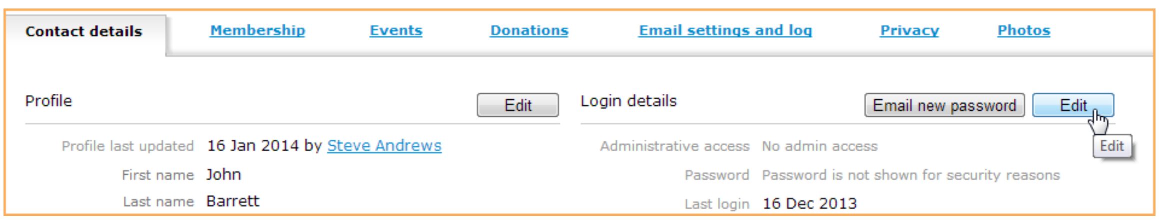
Administrators can be granted full or partial administrative privileges.

> The number of administrators you can add depends on your billing plan.

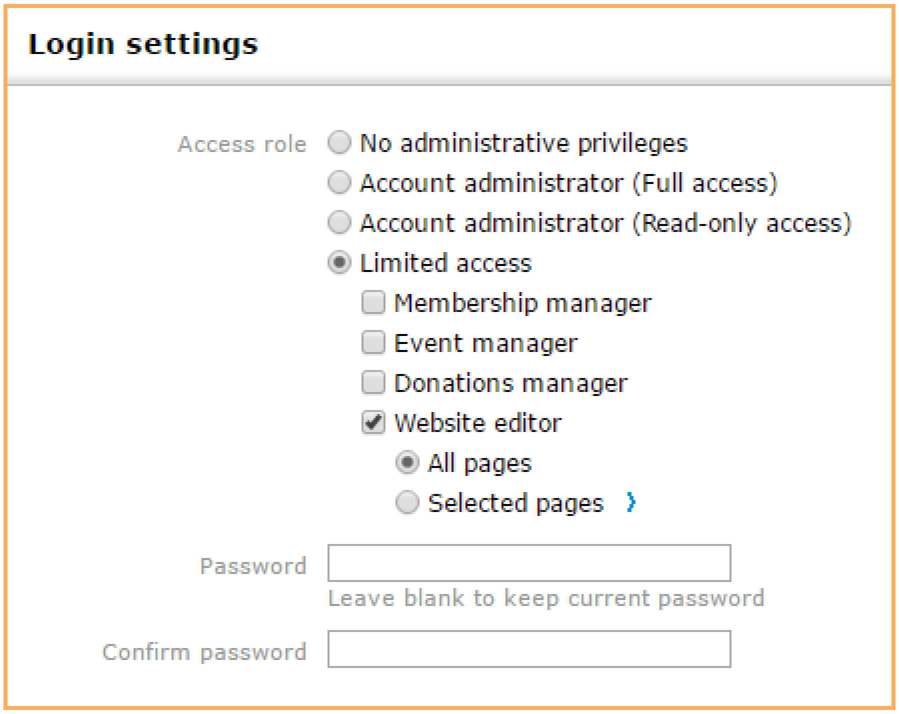
To grant administrative access privileges to a contact, follow these steps:

Read more/less

1. Hover over the **Contacts** menu and select the **List** option.
2. Display the contact record of the contact to be granted admin access.
3. Click the **Edit** button to the right of the **Login details** heading.



4. From the **Login settings** screen, choose the access privileges to be granted to the contact.

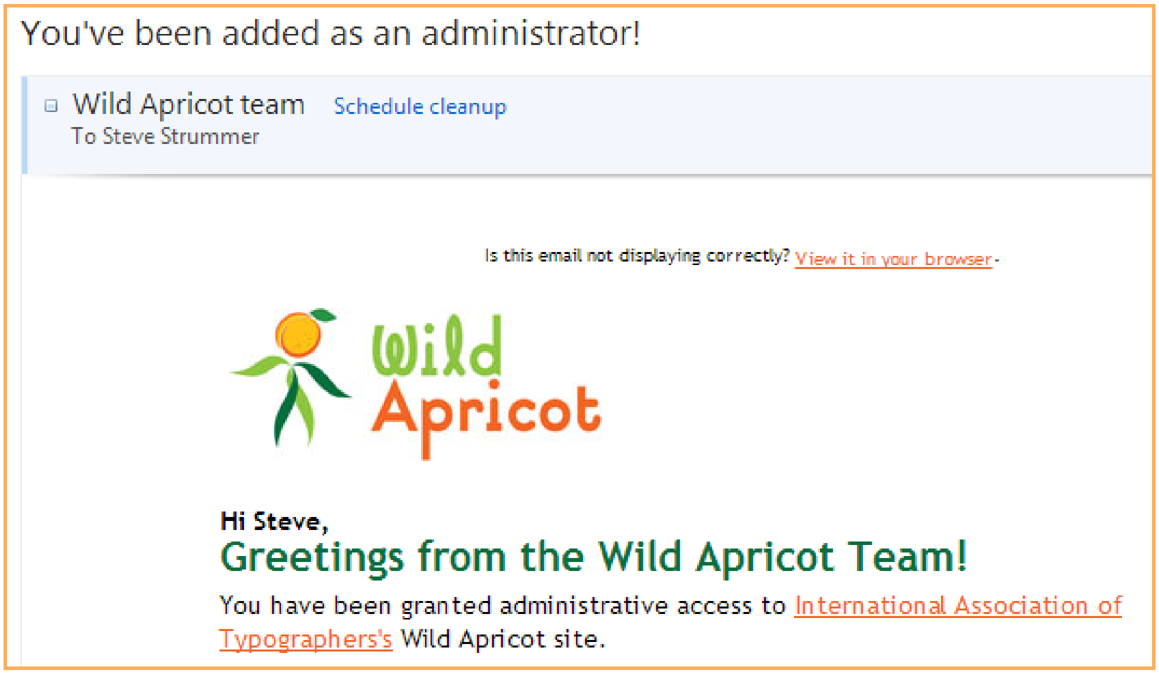


You can choose from the following options:

Option	Description
No administrative privileges	Select this option to remove admin access for existing administrators.
Account administrator (Full access)	Grants full access to all administrative functions. Take care when granting this level of access since full admins can delete other admins and even the entire site.
Account administrator (Read-only access)	Allows viewing of nearly everything in the admin backend without being able to make any changes.
Limited access	Provides administrative access to selected Wild Apricot modules. Use this option if you have dedicated personnel in charge of events, memberships, editing webpages, or managing donations. With this option selected, you can limit access to one of the following roles: **Membership manager** – can create new contacts, modify all existing ones **Event manager** – can create and manage all events **Donations manager** – can manage all donations **Website editor** – can modify your website pages. With this option selected, you can provide access to all pages on your site or to selected pages. When you grant access to a page, you automatically grant access to all of its child or sub pages.

5. Click the **Save** button.

When a contact is granted administrator privileges, an email is sent to the contact with links to more information about managing Wild Apricot sites.

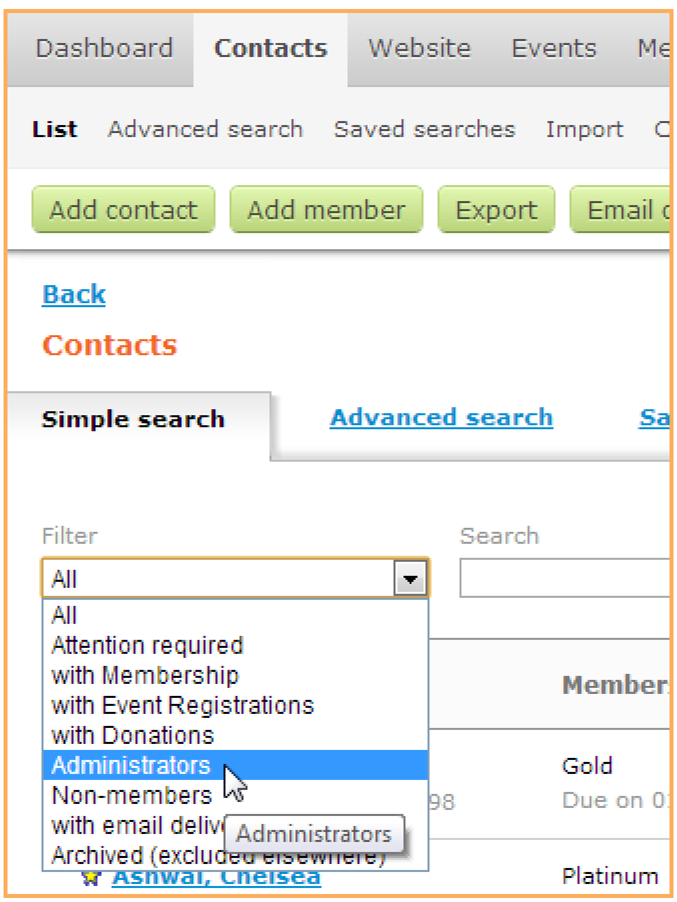


Searching for administrators

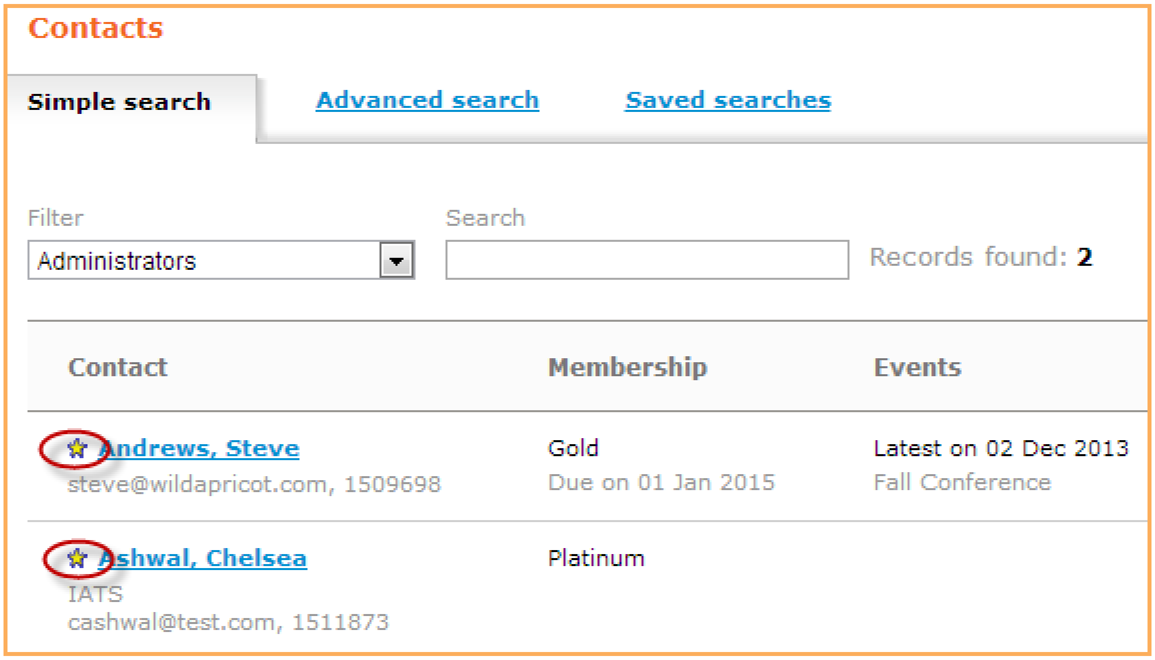
To view a list of currently assigned administrators, follow these steps:

Read more/less

1. Hover over the **Contacts** menu and select the **List** option.
2. On the **Simple search** page, click the **Filter** drop-down list and select **Administrators**.



Within any contact list, administrators have a star icon appearing beside their name.



To narrow the list to display only certain types of administrators, you can enter the administrator type – e.g. "membership manager" – in the **Search** field.

Removing an administrator

To remove administrative privileges for an existing administrator, follow these steps:

Read more/less

1. Display the administrator's contact record.
2. Click the **Edit** button to the right of the **Login details** heading (beside the **Email new password button**).
3. Within the **Login settings** screen, choose the **No administrative privileges** option.
4. Click the **Save** button.

An email will **not** be sent to the contact to inform them of the change.

Features by admin access level

The following table summarizes what each different type of administrator is allowed to see and/or change:

Visual settings

Read more/less

	Full admin	Read-only admin	Membership manager	Event manager	Donations manager	Website editor	Restricted website editor
Change visual theme	Yes					Yes	
Customize colors and styles	Yes	Read-only				Yes	
CSS customization	Yes	Read-only				Yes	
Theme overrides	Yes						

File management	Yes					Yes	Yes

Page management

Read more/less

	Full admin	Read-only admin	Membership manager	Event manager	Donations manager	Website editor	Restricted website editor
View site pages	Yes	Yes	Yes	Yes	Yes	Yes	Yes
Add/edit/trash pages	Yes					Yes	Only allowed pages or subpages
View templates	Yes	Yes				Yes	Yes
Add/edit/trash templates	Yes					Yes	
Reorder pages	Yes					Yes	Only allowed pages or subpages
View system pages	Yes	Yes	Yes	Yes	Yes	Yes	Yes
Edit system pages	Yes					Yes	
View page/template change history	Yes	Yes				Yes	
Restore page/template version	Yes					Yes	
View trash	Yes	Yes				Yes	Only allowed pages or subpages
Restore from trash	Yes					Yes	Only allowed pages or subpages
Empty trash	Yes					Yes	Only allowed pages or subpages

Contacts management

Read more/less

	Full admin	Read-only admin	Membership manager	Event manager	Donations manager	Website editor	Restricted website editor

View contacts tab	Yes	Yes	Yes	Yes	Yes		
Customize contact fields	Yes	Read-only	Yes				
Add new contact	Yes		Yes	Yes	Yes		
Archive contact	Yes		Yes				
Delete contact	Yes		Yes				
Add/edit access role/delete administrators	Yes						
View contact details (summary, all tabs)	Yes	Yes	Yes	Yes	Yes		
View Financial transactions link	Yes	Yes	Yes	Yes	Yes		
Generate Account statement report	Yes	Yes	Yes	Yes	Yes		
Edit contact/membership card (Contact details tab)	Yes		Yes	Yes	Yes		
Edit login details (Contact details tab)	Yes		Yes (excluding admins)				
Edit internal use (Contact details tab)	Yes		Yes				
Assign/Edit membership (Membership tab)	Yes		Yes				
Renew membership (Membership tab)	Yes		Yes				
Actions from warning boxes (Membership tab)	Yes		Yes				

Suspend/resume membership (Membership tab)	Yes		Yes				
Add to bundle (Membership tab)	Yes		Yes				
Add member to bundle (Membership tab)	Yes		Yes				
Record event registration (Events tab)	Yes		Yes	Yes			
Record payment for unpaid registration (Events tab)	Yes		Yes	Yes	Yes		
Cancel registration/Confirm registration without invoice (Events tab)	Yes			Yes			
Record donation (Donations tab)	Yes		Yes		Yes		
Edit contact's email preferences (Email settings tab)	Yes		Yes				
Disable all emails for a contact (Email settings tab)	Yes		Yes				
Change a contact's Event announcements preference (Email settings tab)	Yes		Yes				
Change a contact's Email blasts preference (Email settings tab)	Yes		Yes				

Change a contact's forum/topic subscriptions (Email settings tab)	Yes		Yes				
Edit privacy settings (Privacy tab)	Yes		Yes				
View full contact list	Yes	Yes	Yes	*Yes*	*Yes*		
Record payment (contact list)	Yes		Yes	Yes	Yes		
Save searches	Yes	Yes	Yes				
Run saved searches	Yes	Yes	Yes	Yes	Yes		
Export contacts	Yes	Yes	Yes	Yes (excluding Internal use fields)	Yes (excluding Internal use fields)		
Email contacts	Yes		Yes	Yes	Yes		
Import contacts	Yes		Yes				
Delete all contacts	Yes						

Members management

Read more/less

	Full admin	**Read-only admin**	**Membership manager**	**Event manager**	**Donations manager**	**Website editor**	**Restricted website editor**
View members tab	Yes	Yes	Yes				
View member list	Yes	Yes	Yes				
Save & rerun saved searches	Yes	Yes	Yes				
Customize membership fields	Yes	Read-only	Yes				
Add/edit/delete member levels	Yes	Read-only	Yes				

Add/edit/manage/delete groups	Yes	Read-only	Yes				
Customize member profile display settings	Yes	Read-only	Yes				
Customize automatic member renewals	Yes	Read-only	Yes				
Customize member application workflow and emails	Yes	Read-only	Yes				
Create/edit search result layouts	Yes	Read-only	Yes				
Discount codes for membership	Yes	Read-only	Yes				
Extra costs for member application form	Yes	Read-only	Yes				
Customize member directory settings	Yes					Yes	Yes (if allowed)
Edit member photo album	Yes		Yes				

Events management

Read more/less

	Full admin	Read-only admin	Membership manager	Event manager	Donations manager	Website editor	Restricted website editor
Customize event list settings	Yes			Yes		Yes	Yes (if allowed)
View events tab	Yes	Yes		Yes			
Add/edit/delete event	Yes			Yes			
Customize event registration form	Yes			Yes			

Add/edit/delete event registration types	Yes			Yes			
Add attendee	Yes		Yes	Yes			
Edit/cancel/delete event registration	Yes			Yes			
Add guest	Yes		Yes	Yes			
Generate invoice/record payment	Yes		Yes	Yes	Yes		
Confirm without invoice	Yes			Yes			
Restore canceled registration	Yes			Yes			
Send notification to attendee	Yes			Yes			
Export event attendees	Yes	Yes		Yes			
Email event attendees	Yes			Yes			
Customize event registration emails	Yes	Read-only		Yes			
View event payment report	Yes	Yes		Yes			
Generate event registration report	Yes	Yes		Yes			
Tracking event attendees	Yes	Read-only		Yes			

Donations management

Read more/less

	Full admin	Read-only admin	Membership manager	Event manager	Donations manager	Website editor	Restricted website editor
View donations tab	Yes	Yes			Yes		

Customize donation confirmation email	Yes	Read-only			Yes		
Export donations	Yes	Yes			Yes		
Record donation	Yes		Yes		Yes		
Edit/delete donation	Yes				Yes		
Refund donation	Yes		Yes	Yes	Yes		
Preview/print email/donation receipt	Yes	Yes (except email)	Yes	Yes	Yes		
Customize donation fields	Yes	Read-only			Yes		

Financial management

Read more/less

	Full admin	Read-only admin	Membership manager	Event manager	Donations manager	Website editor	Restricted website editor
View invoices/payments list	Yes	Yes	Yes	Yes	Yes		
Export invoices/payments	Yes	Yes	Yes				
Add/view/edit/delete invoice	Yes	View-only	Yes	Yes	Yes		
Preview/print/email invoice	Yes	Yes (except email)	Yes	Yes	Yes		
Record/view/edit/delete payment	Yes	View- only	Yes	Yes	Yes		
Settle/unsettle payment	Yes		Yes	Yes	Yes		
Preview/print/email payment receipt	Yes	Yes (except email)	Yes	Yes	Yes		
Add/view/edit/delete refund	Yes	View- only	Yes	Yes	Yes		

View activity log/entry details	Yes	Yes	Yes	Yes	Yes		
View/generate/ export reports (Income, Payments etc)	Yes	Yes	Yes	Yes	Yes		
View/customize invoice	Yes	Read-only	Yes	Yes			
View/customize payment receipt	Yes	Read-only	Yes	Yes			
View/customize donation receipt	Yes	Read-only			Yes		
View/edit payment settings	Yes	Read-only					
Tender management	Yes	Read-only					

Account and billing

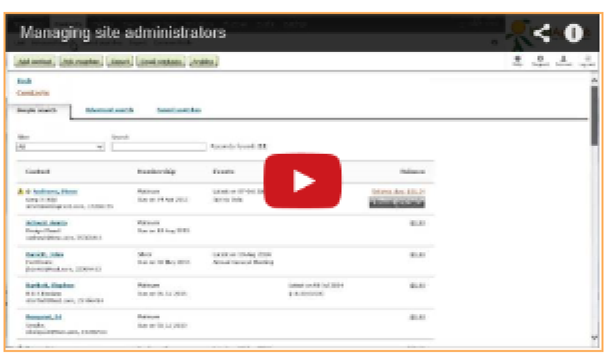
Read more/less

	Full admin	Read-only admin	Membership manager	Event manager	Donations manager	Website editor	Restricted website editor
View/edit organization details	Yes	Read-only					
Account and Billing	Yes	Read-only					
Upgrade account	Yes						
Change billing plan	Yes						
Change billing contact	Yes						
Change credit card details	Yes						
Delete account	Yes						

Other functionality

Read more/less

	Full admin	Read-only admin	Membership manager	Event manager	Donations manager	Website editor	Restricted website editor
Domain name management	Yes	Read-only					
Global Javascript (Web analytic integration)	Yes	Read-only					
Get widgets code	Yes	Yes				Yes	
View log of email blasts/drafts, use email drafts	Yes	Read-only	Yes	Yes	Yes		
View referrals section, send email invitation	Yes	Yes					
Meta tags (for search engines)	Yes	Read-only					
Anti-spam settings (Captcha)	Yes	Read-only					
Authorization required message	Yes	Read-only					
Routing of system emails	Yes	Read-only					



Video: Managing site administrators (4:10)

On this page:

- Adding an administrator
- Searching for administrators
- Removing an administrator
- Features by admin access level

- Visual settings
- Page management
- Contacts management
- Members management
- Events management
- Donations management
- Financial management
- Account and billing
- Other functionality

Expand all sections

See also:

- Switching between admin and public views
- Page access and visibility

Page and field size limits

Page and field size limits

Account

Item	Limit
Email address	100 characters
Organization name	256 characters

Contacts

Item	Limit
First name	50 characters
Last name	50 characters
Email	100 characters
Password	50 characters
Phone	50 characters
Organization	200 characters
Multiline text	3000 characters
Notes	3000 characters

Pages

Item	Limit
Overall limit	16Mb (per page)
Page URL	250 characters

Blogs

Item	Limit

Subject	400 characters
Text per post	50Kb or 51200 characters
omment	25000 characters
Author name	100 characters

Forums

Item	Limit
Subject	500 characters
Body	50Kb or 51200 characters
Author name	100 characters

Events

Item	Limit
Name	255 characters
Description	50000 characters
Additional event information	2048 characters
Location	255 characters
Registration message	500 characters
Payment instructions	500 characters
Registration type name	256 characters

Donations

Item	Limit
Comments	3000 characters

Email blasts

Item	Limit
Subject	500 characters
Body	150,000 characters

Finances

Item	Limit
Payment instructions	2000 characters
Tender name	200 characters
Tax name	50 characters
Invoice item description	1000 characters

Comments for payer	200 characters
Internal notes	3000 characters

Database fields

Item	Limit
Field name	100 characters
Field instructions	250 characters

By field type

Field type	Item	Limit
Text	Text	200 characters
Multiline text	Text	3000 characters
Multiple choice, radio buttons, dropdown	Text	100 characters (each item)
Rules and terms	Text	100 characters
	Link	1000 characters
Extra charges	Item	100 characters
	Cost	10 characters

On this page:

Functionality by billing plan

Functionality by billing plan

The following table lists functionality and limits which differ between billing plans. It does not include Wild Apricot functionality and limits which are shared by all plans.

Subscription Plan (all fees USD)	Trial (30 days)	Free (with banner)	Group ($40/mth)	Community ($70/mth)	Professional ($130/mth)	Network ($240/mth)	Enterprise ($270/mth)
Max # of administrators	5	1	5	10	25	unlimited	unlimited
Contact database size	500	50	250	500	2,000	5,000	15,000

Max # of email recipients	500	50	250	500	2,000	5,000	15,000
Single file size limit	100 MB	100 MB	100 MB	100 MB	100 MB	100 MB	100 MB
Overall file storage limit	100 MB	100 MB	2 GB	2 GB	2 GB	2 GB	2 GB
Online payments	Yes	No	Yes	Yes	Yes	Yes	Yes
Recurring payments	Yes	No	No	Yes	Yes	Yes	Yes
Custom domain name	No	No	Yes	Yes	Yes	Yes	Yes
Theme overrides	Yes	No	Yes	Yes	Yes	Yes	Yes
Site search gadget	Yes	No	Yes	Yes	Yes	Yes	Yes
Scheduling email blasts	Yes	No	Yes	Yes	Yes	Yes	Yes
Wild Apricot banner	No	Yes	No	No	No	No	No

See also:

- Pricing
- Changing your billing plan

Changing your billing plan

Changing your billing plan

Upgrading from a free or trial account

When you open a Wild Apricot account, you automatically get a free 30-day trial. Your trial account has full access to Wild Apricot functionality at the Community billing plan level, with a few differences.

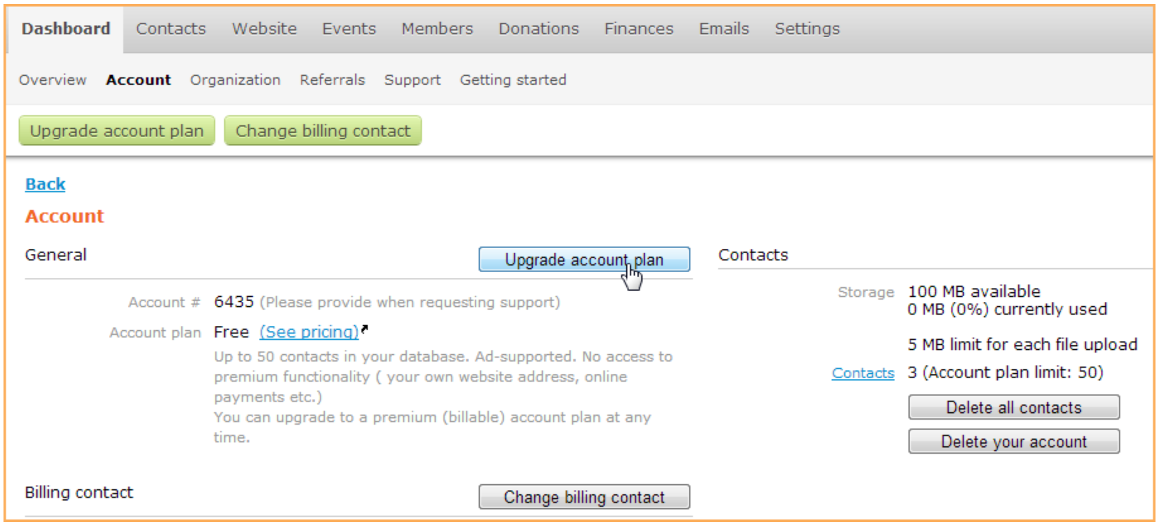
Plan	Trial	Community
Max # of administrators	5	10
Overall storage limit	100 MB	2 GB
Use custom domain?	No	Yes

If you do not upgrade (or delete your account) before your trial period expires, you will automatically be downgraded to the ad-supported free plan. All your data and webpages will stay intact, but some functions will be deactivated, and Wild Apricot banners will be displayed on your site.

To keep your free account active, you must log into it as an administrator at least once every three months. If you do not do so, your account will be suspended after 3 months, and eventually deleted if no further activity takes place.

To upgrade from a free or trial account to one of Wild Apricot's paid plans, follow these steps:
Read more/less

1. Hover over the **Dashboard** menu and click **Account**.
2. From the **Account and billing** screen, click the **Upgrade to paid account** button to upgrade from a trial account or the **Upgrad e account plan** button to upgrade from a free account.



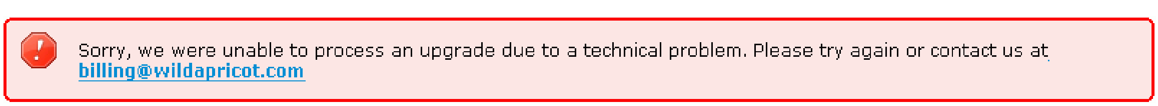
3. Choose the billing plan you want to upgrade to, and the payment method you want to use, then click **Next**. (For a detailed list of the differences between the various plans, click here.) Monthly plans are only payable by credit card as a recurring monthly charge. Annual plans (which offer a 10% discount) can be paid either by credit card as a recurring charge or by invoice (payable by check or through PayPal).
4. On the next screen, provide information for the billing contact and click **Next**.

> You can change billing contact information later from the **Account and billing** screen.

5. If you chose a credit card payment method, proceed with the payment then click **Next**. You'll be upgraded to your new account plan as soon as the payment has been successfully processed.

   If you chose to be invoiced for an annual plan, you'll be asked to confirm your invoice request. If you click **Confirm invoice request**, an invoice will be immediately generated and emailed using the billing contact information you provided. You will be returned to the **Account and billing** screen where you can view, print, or cancel the invoice.

Occasionally, you may get an error message when you try to upgrade your free or trial account to a paid account.



This is very rare case and it might occur when a payment processor (e.g. Paypal) gets very busy. In this case, your upgrade request will be put on hold by the system (in order to avoid any duplicate charges) until you get in touch with Wild Apricot technical support. After support reviews your account, it will be either upgraded or, if no payment was received, your plan will be restored to its existing plan so you can repeat the payment.

Upgrading or downgrading a paid plan

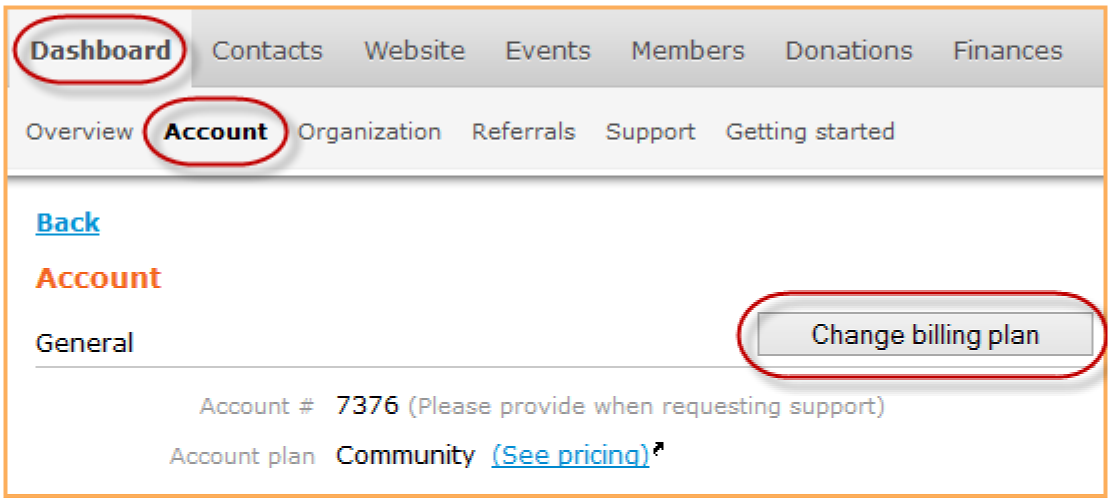
At any time, you can change your Wild Apricot plan. You can upgrade to a plan with more features or downgrade to a plan with a lower cost.

- When you downgrade to a lower plan, you may lose some functionality, but you won't lose existing contacts, administrators, or files, even if your account exceeds the new, lower limits.
- When you upgrade an account – switch to a higher plan – you will be charged a pro-rated upgrade fee covering the remainder of your current billing cycle.
- If you have an annual plan, please contact Wild Apricot support to discuss your options as they depend on your remaining subscription period.

To upgrade or downgrade a monthly plan, follow these steps:

Read more/less

1. Hover over the **Dashboard** menu and click **Account**.
2. From the **Account and billing** screen, click the **Change billing plan** button.



3. Choose the billing plan you want to switch to, and indicate whether you want to pay using the credit card already on file or another card. (For a detailed list of the differences between the various plans, click here.)
4. After you have made your choices, click **Next**.

If you downgrade your account, any remaining portion of your previous payment will not be refunded.

5. Click **Confirm** to complete the change.

On this page:

Expand all sections

Changing your billing details

Changing your billing details

For security reasons, we cannot take credit card information over the phone or through email. However, you can update your credit card details and billing contact information yourself online.

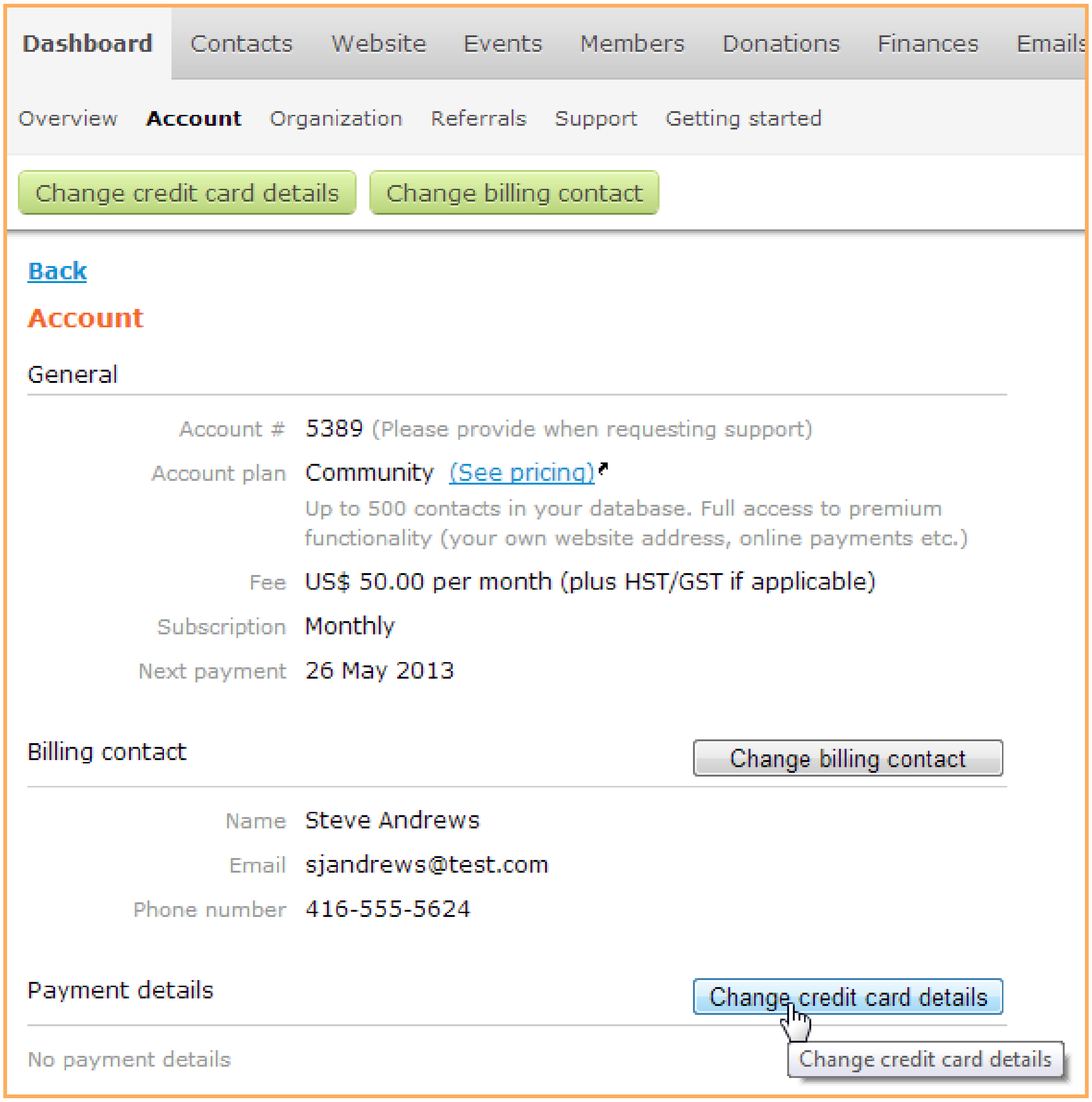
Change credit card details

Only full account administrators can modify the credit card details for an account.

To change or update the credit card being currently billed for your Wild Apricot account, follow these steps:

Read more/less

1. Hover over the **Dashboard** menu and select the **Account** option.
2. From the Account screen, click the **Change credit card details** button.



3. Review and adjust the billing name and address, then click **Next** to continue.
4. Update your credit card information then click the **Confirm** button.

> **Please note**
> Although there is no information displayed on this screen when you load it, you only have to enter any information that you wish to change. Information entered earlier is automatically retained and you do not need to re-enter it.

Your information will be updated, and a confirmation message will be displayed.

Billing contact

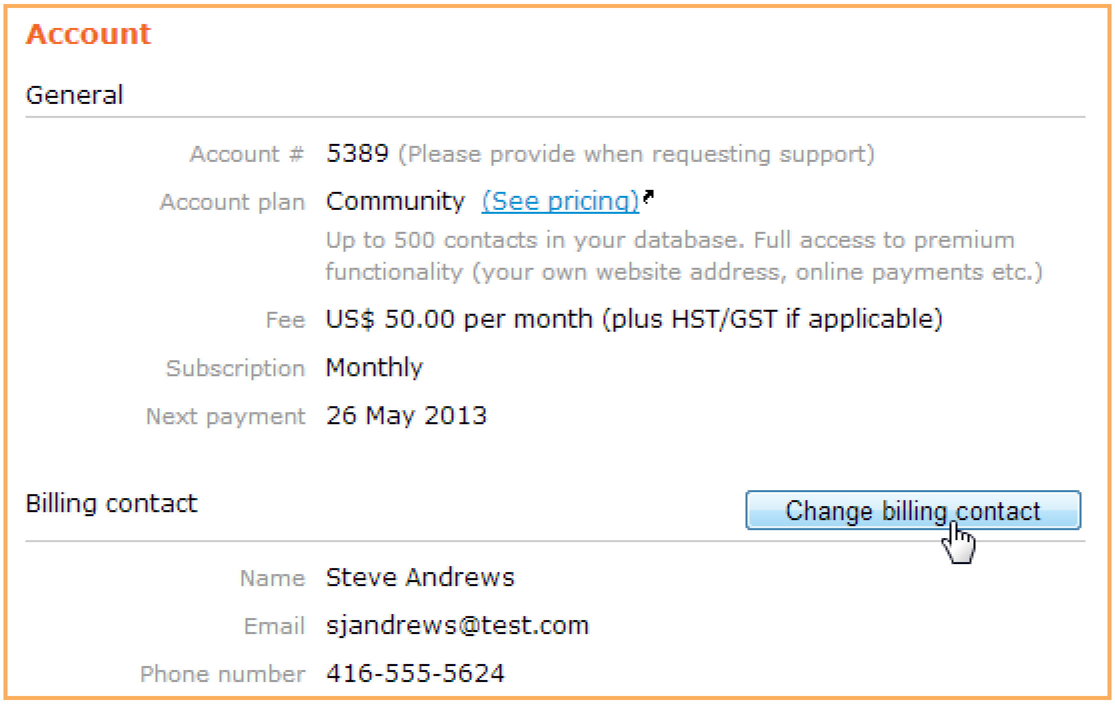
If your organization has a dedicated billing contact, you can add his/her contact information to the account. This way, all billing related notifications will be addressed directly to them.

Only full account administrators can modify the billing contact, and only full account administrators have the authority to modify the account, regardless of who the billing contact is.

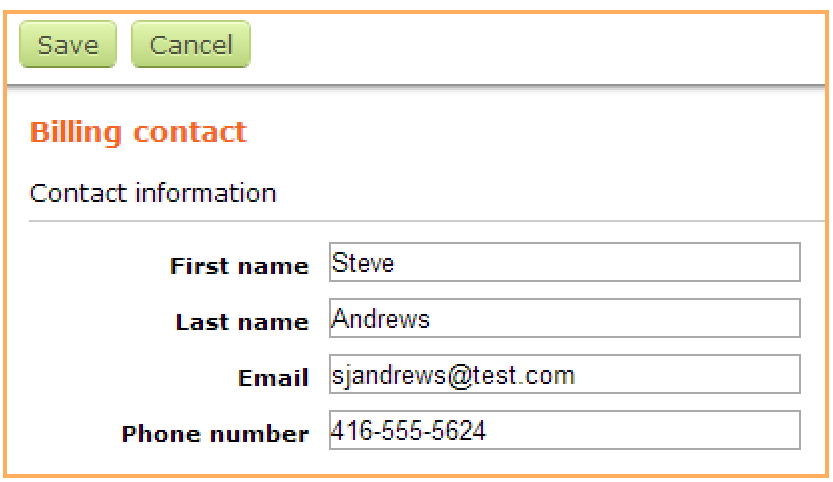
To add or update the billing contact, follow these steps:

Read more/less

1. Hover over the **Dashboard** menu and select the **Account** option.
2. From the Account screen, click the **Change billing contact** button.



3. On the following screen, update the details then click the **Save** button.



On this page:

- Change credit card details
- Billing contact

Expand all sections

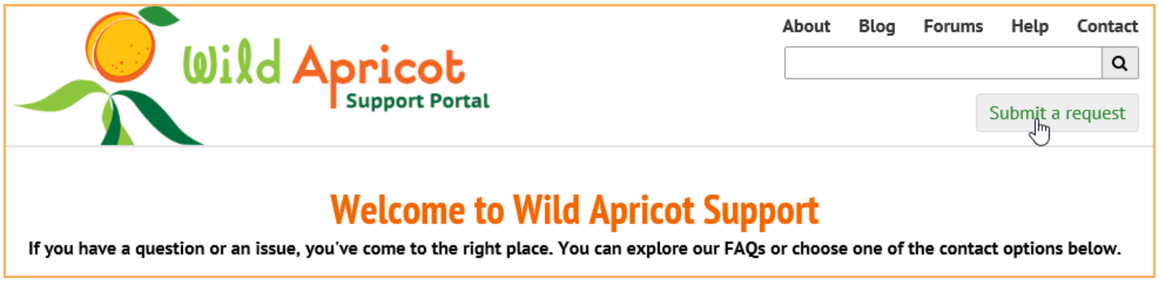
Requesting a Wild Apricot payment receipt

Requesting a Wild Apricot payment receipt

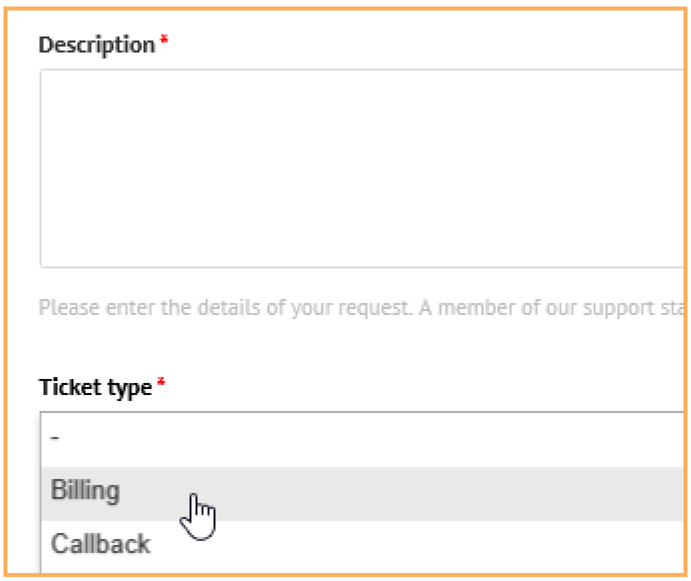
If you require a receipt of payments towards your Wild Apricot account, you can submit a support request to our Billing department.

> ⚠ Our payment system retains receipts for the last 18 months only.

You can submit a support request by clicking the **Submit a ticket** option on the support portal at http://support.wildapricot.com.



On the support request form, enter a brief summary of your request in the **Subject** field, and details of the request in the **Description** field. Then, choose **Billing** as the **Ticket type** .



When you are finished, click the **Next** button.

Backing up your data

Backing up your data

We automatically back up all Wild Apricot accounts on a daily basis and store the backups at a location separate from our data center. These backups protect your data from catastrophic threats to our data center, and can be used to restore lost data only in the case of emergency. These backups are not available to clients.

You can, however, back up your contact database, event registration details, invoices, and payments and refunds, by exporting them to Excel spreadsheets. The export file will be an .XML file in Microsoft Excel format.

You can also download individual web pages, and archive your entire Wild Apricot site.

Exporting your contact database

You can back up the contact data from your Wild Apricot account by exporting it into an Excel spreadsheet. You can use the exported spreadsheet file to import and thereby restore contacts and their data.

To export your contact data into an Excel spreadsheet, follow these steps:
Read more/less

1. Hover over the **Contacts** menu and select the **List** option.
2. Do not filter the list unless you want to back up only selected contacts.
3. Click the **Export** button.
4. On the screen that appears, select the export file format – XLS, CSV, or XML.
5. Choose which fields to include in the export file.
6. Click the **Export** button .

While the export file is being generated, you can click the **Continue working** button and safely switch to another Wild Apricot admin screen. Once the file is generated, you'll receive an email with a link to the file.

If you waited until the export file was generated, the file will be automatically downloaded. As well, a dialog with a link to the file will appear, and an email with the link will be sent to you.

Before clicking the download link within the email, make sure you are logged into your Wild Apricot account as an administrator , and in admin view.

You can now open the file in Excel or another spreadsheet program.

The exported spreadsheet will consist of the following columns...

• User ID • First name • Last name • Organization • Email • Phone • Password • Group participation	• Archived • Subscribed to emails • Subscription source • Event announcements • Member emails and newsletters • Administration access • Created on • Profile last update	• Updated by • Balance • Total donated • Membership enabled • Membership level • Membership status • Member since • Renewal due	• Renewal date last changed • Level last changed • Access to profile by others • Details to show • Photo albums enabled • Member bundle ID or email • Member role • Notes

...plus any custom fields you have added.

Archived contacts will not be included in the export file. If you want to back up your archived contacts, repeat these process after filtering the list to display archived contacts.

Exporting event registration details

You can export registration details for an event, including payment information. To do so, follow these steps:
Read more/less

1. Hover over the **Events** menu and select the **Event list** option.
2. Within the event list, click the event.
3. Click the **Attendees** link.
4. Click the **Export attendees** button.
5. On the screen that appears, select the export file format – XLS, CSV, or XML.
6. Choose which fields to include in the export file.
7. Click the **Export** button .

While the export file is being generated, you can click the **Continue working** button and safely switch to another Wild Apricot admin screen, or wait to download the generated file.

Exporting your invoice list

You can export your invoices list – as it appears on the Invoices screen – to an Excel spreadsheet. To export your invoices list, follow these steps:
Read more/less

1. Hover over the **Finances** menu and select the **Invoices** option.
2. From the **Invoices** tab that appears, click the **Export to Excel** button.
3. On the screen that appears, select the export file format – XLS, CSV, or XML.
4. Choose which fields to include in the export file.
5. Click the **Export** button .

While the export file is being generated, you can click the **Continue working** button and safely switch to another Wild Apricot admin screen, or wait to download the generated file.

Exporting your payments and refunds list

You can export your payments and refunds list – as it appears on the Payments & refunds screen – to an Excel spreadsheet. To export your payments and refunds list, follow these steps:

Read more/less

1. Hover over the **Finances** menu and select the **Payments and refunds** option.
2. Click the **Export to Excel** button.
3. On the screen that appears, select the export file format – XLS, CSV, or XML.
4. Choose which fields to include in the export file.
5. Click the **Export** button .

While the export file is being generated, you can click the **Continue working** button and safely switch to another Wild Apricot admin screen, or wait to download the generated file.

Copying resource files

You can use WebDAV to copy files from the Resources folder on your site. These files can include pictures and documents uploaded to your site, your photo albums, your theme files and theme overrides, and your custom email templates.

A WebDAV connection appears as another drive on your computer. You can view and manage the folders and files stored on your Wild Apricot through the folders appearing within the WebDAV drive. You can perform all the same actions – drag and drop, rename, delete – that you would on files and folders stored on your own computer. For more information, see Uploading files in bulk using WebDAV .

Downloading individual web pages

To download an individual web page from your Wild Apricot site, follow these steps:

Read more/less

1. Display the page within your browser.
2. Right click over a section of it – other than a picture or link – and select the **Save as** or **Save page as** option. Alternatively, you could select the **Save as** or **Save page as** option from the **File** menu.
3. Save the HTML file to a folder on your computer or network.

You can use the downloaded file as a reference – or copy HTML code from it – if you need to reconstruct a page after deleting some or all of it.

Archiving your website

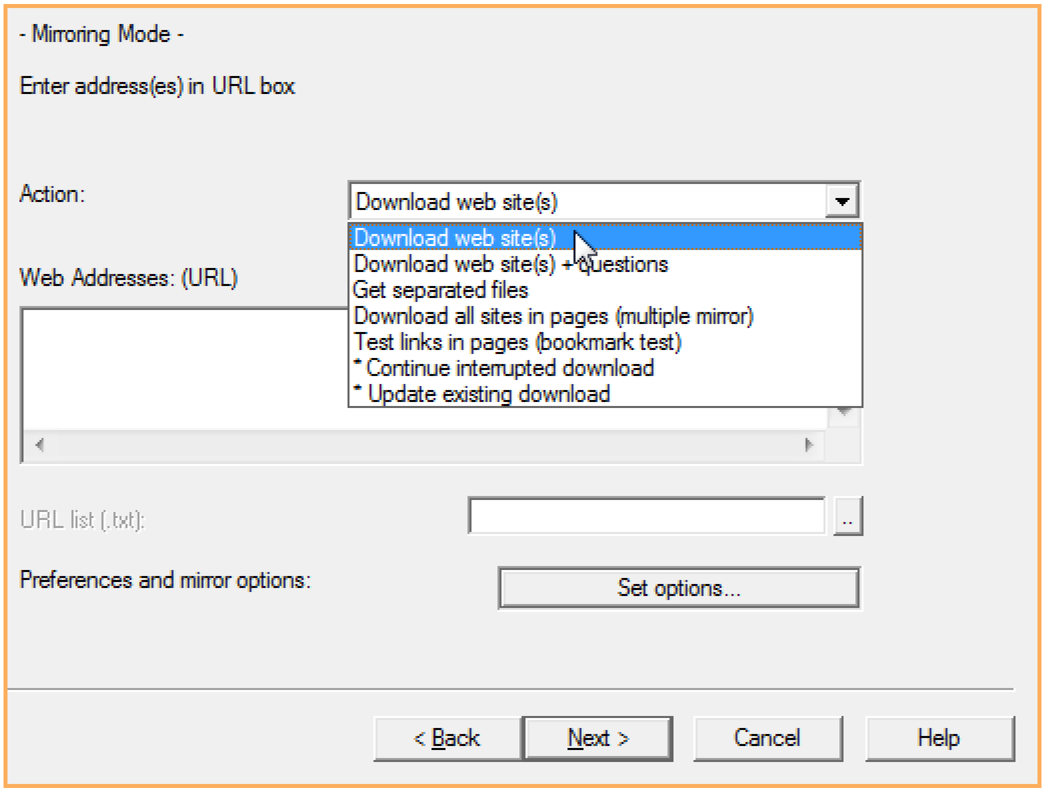
To download or archive your entire site, you can use free software such as HTTrack. You can use the downloaded site files as an archive – a snapshot of your site at a particular moment in time – and as a reference if you need to repair any portion of your actual Wild Apricot site.

> ⚠ You cannot use HTTrack to restore your site, only to download or archive the files that comprise your site.

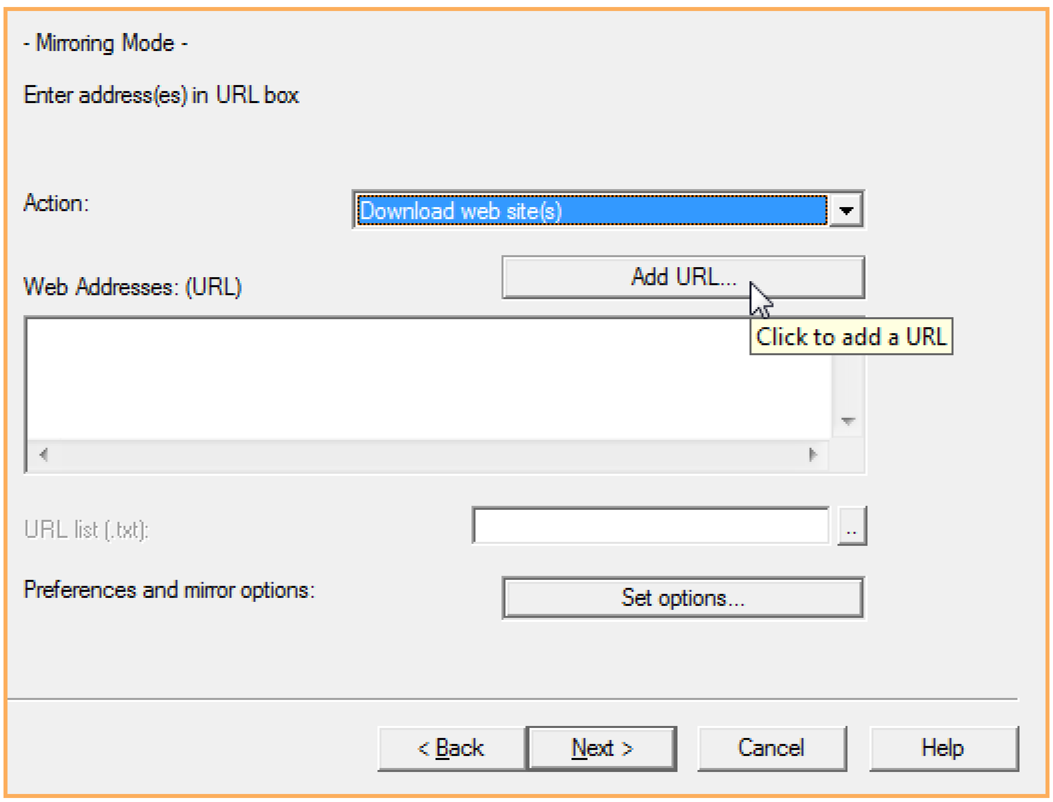
To download your entire Wild Apricot site using HTTrack, follow these steps:

Read more/less

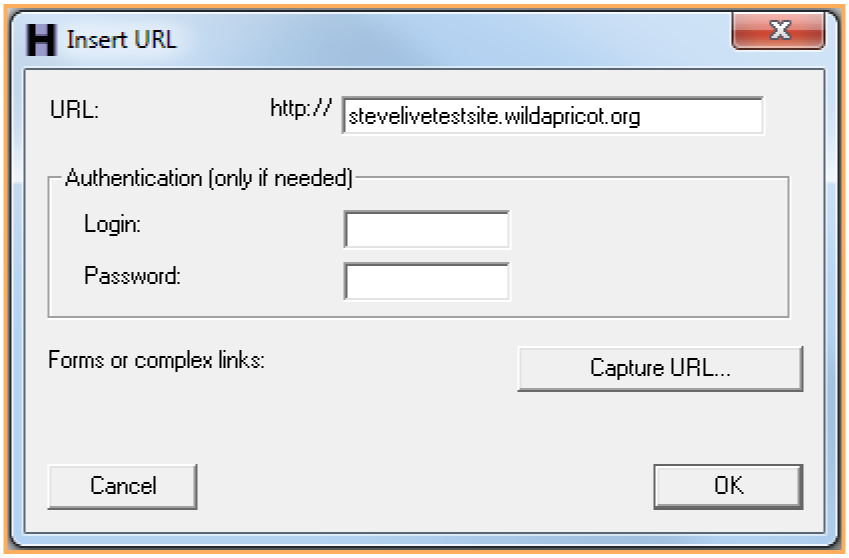
1. Download, install, and run HTTrack.
2. From the main HTTrack screen, click **Next** to begin.
3. Within the **Action** drop down, select **Download web site(s)**.



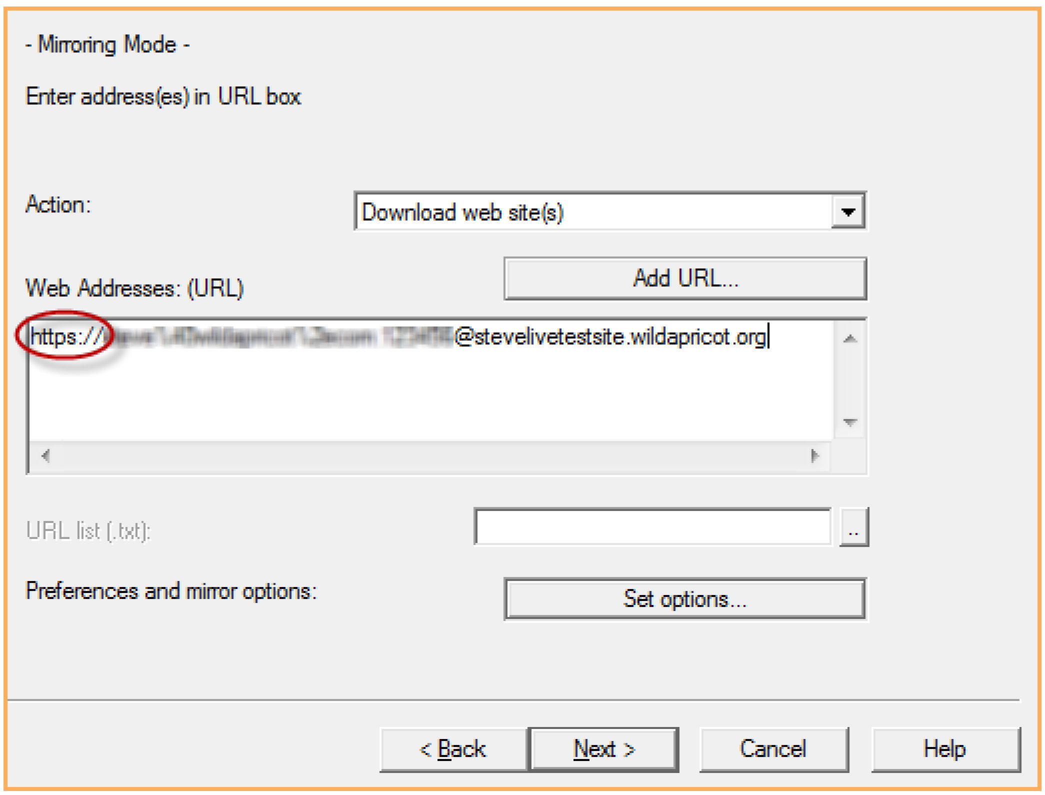
4. Click the **Add URL** button to add your Wild Apricot site address.



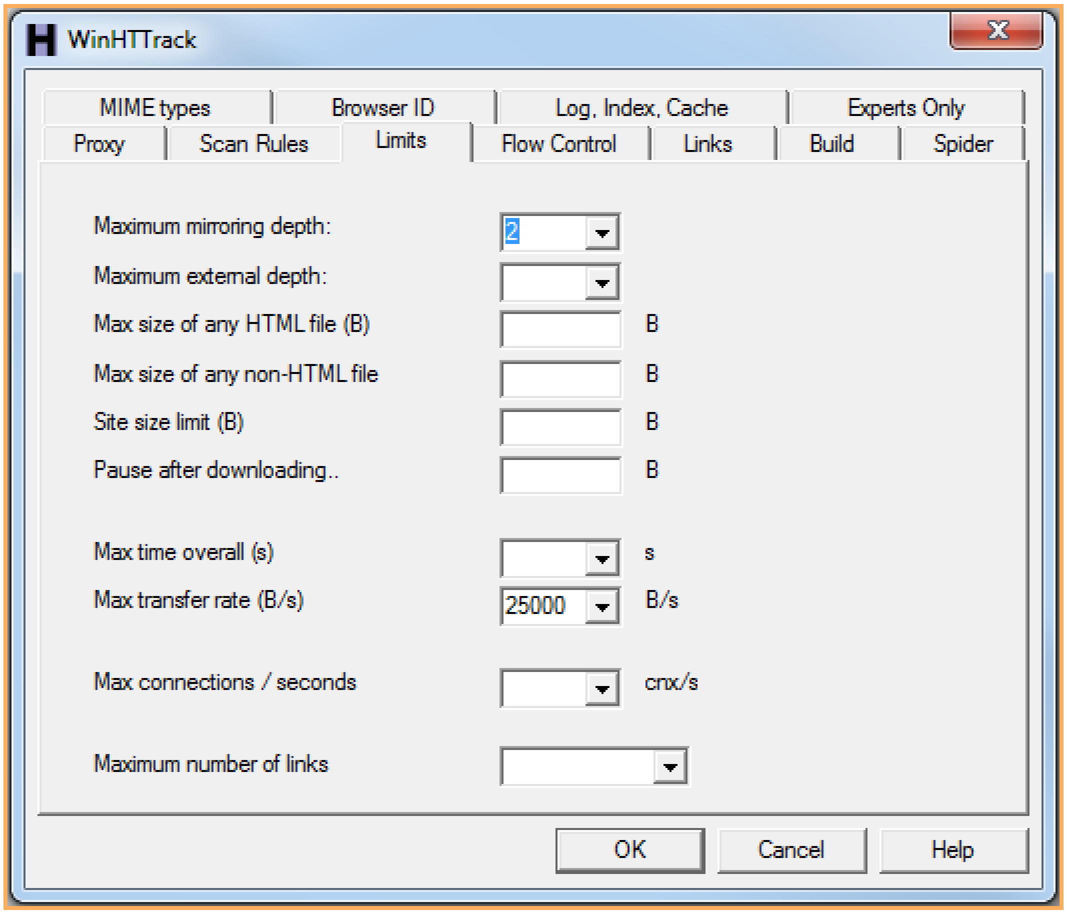
5. Enter your Wild Apricot site address – minus the *http* – in the **URL** field. Click **OK** to proceed.



6. If you've set traffic encryption on your Wild Apricot site to **Always**, you must manually add an *s* to the *http* at the beginning of the **Web Addresses** string.



7. Click the **Set options** button and set the **Maximum mirroring depth** on the **Limits** tab to 2. Click **OK** to proceed.



8. Click **Next** to proceed.
9. Click **Finish** to begin copying your site.

On this page:

Expand all sections

Cancelling your account

Cancelling your account

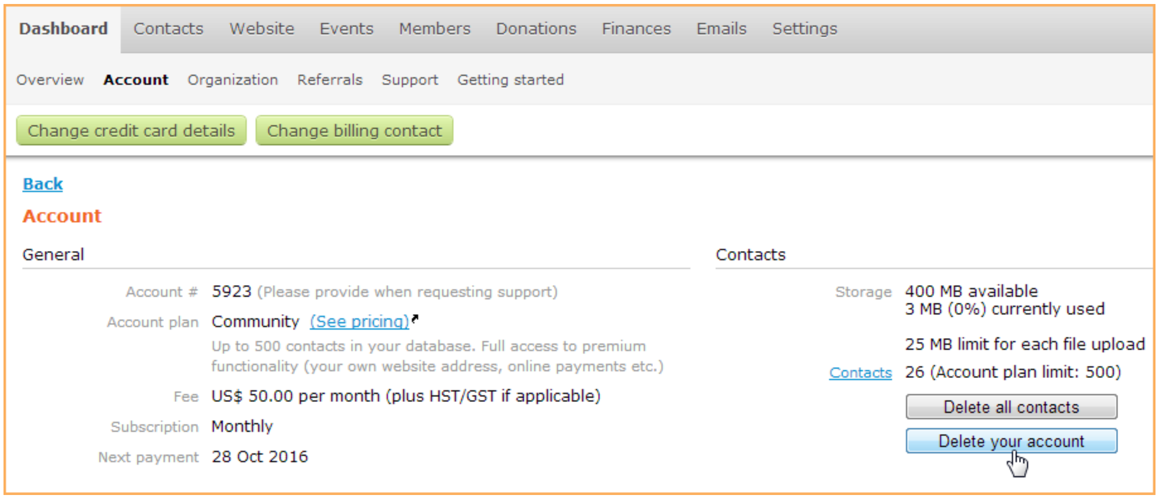
If you decide that Wild Apricot does not fit your needs, you can cancel – i.e. close – your account at any time.

Please note:

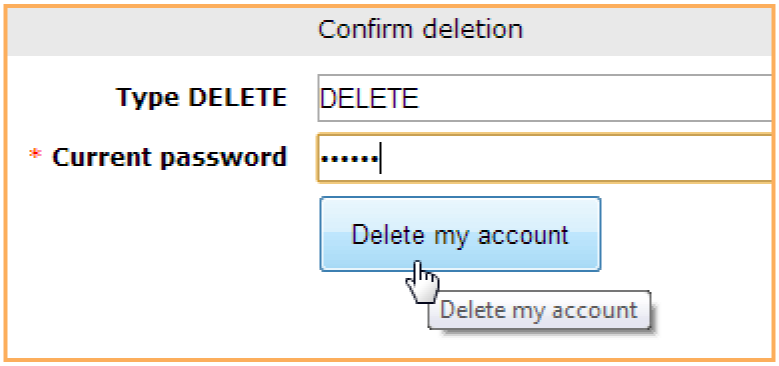
- Closing your account will permanently delete your site's webpages and data, including any contact information.
- Before cancelling your account, you might want to back up your data.
- Instead of closing your account, you could downgrade it to a free plan. For more information, see Changing your billing plan.
- There are no refunds for the remaining portion of the subscription period. For more information, see our refund policy.

To cancel your account, follow these steps:

1. Hover over the **Dashboard** menu then select the **Account** option.
2. From the Account screen, click the **Delete your account** button.



3. On the screen that appears, feel free to let us know why you are leaving and what we can do to improve Wild Apricot.
4. To confirm your intention to delete your account, type DELETE in the confirmation field and enter your password in the password field, then click **Delete my account**.



Referrals

Referrals

You can earn commissions by referring new users to Wild Apricot. When they upgrade to a paid account, you will get 10% of their monthly charge for 2 years. Once you have $100 or more accumulated, contact billing@wildapricot.com and we will send you the payment.

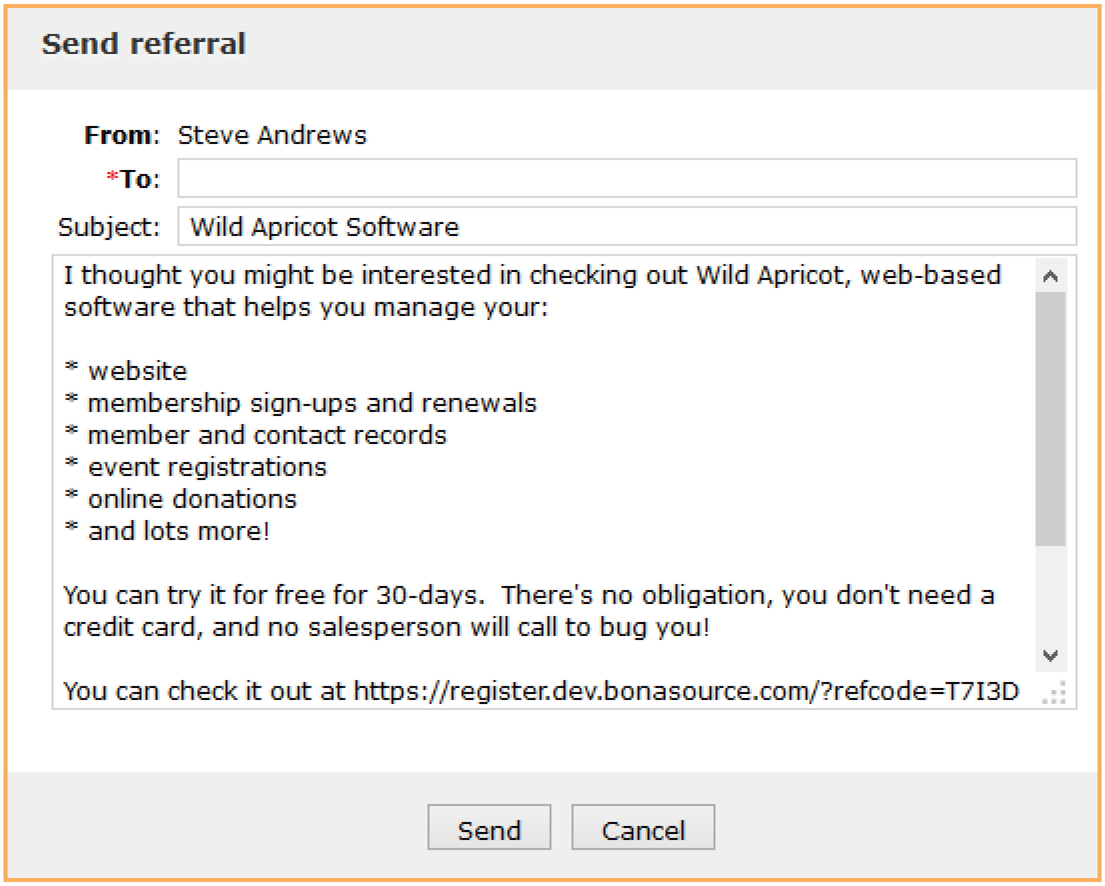
You can send referrals from your Dashboard or from the Referrals screen. You can view a summary of your referrals from the Dashboard, and details of your referrals from the Referrals screen.

For detailed information on the referral program and how it works, see our Affiliate program (Referral commissions) - terms of use.

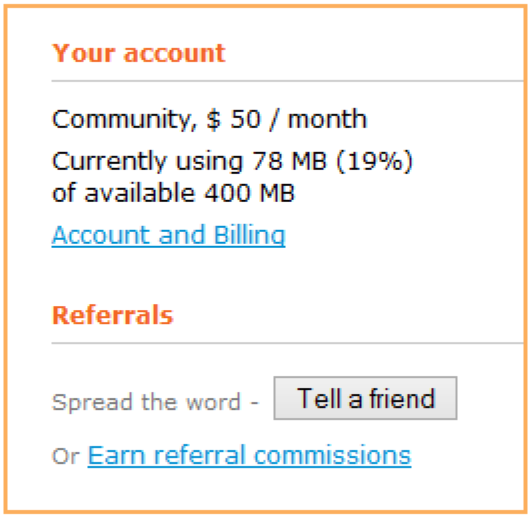
Sending referrals from the Dashboard

To send a referral without earning a commission, click the **Tell a friend** button within the **Referrals** section of your Dashboard. A generic referral message will appear that you can modify before sending.

Read more/less



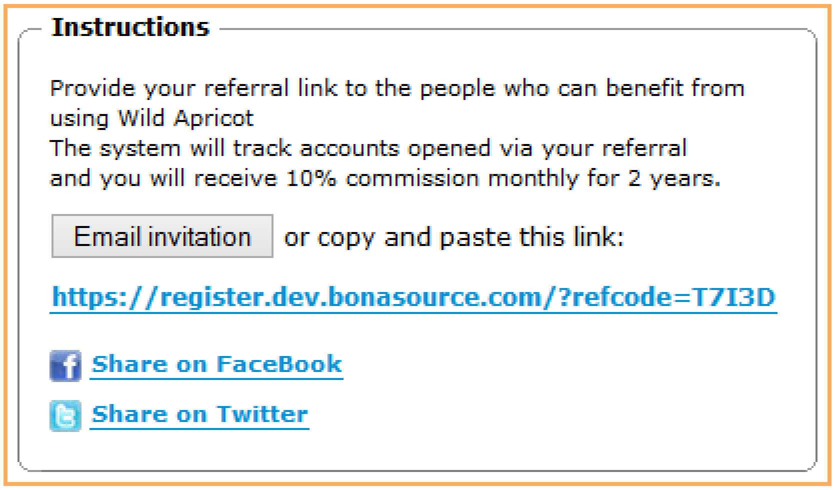
If you want to earn referral commissions, click the **Earn referral commissions** link and send the referral from the Referrals screen.



Sending referrals from the Referrals screen

Sending a referral involves sending a special link that your friend or colleague can use to sign up for a Wild Apricot account so that you are credited for the referral. To send the link, you can click the **Email invitation** button and send the generic referral message that appears, or you can copy and paste the link that appears into your own email message.

Read more/less



You can modify the generic message or just enter an email address and send it as is.

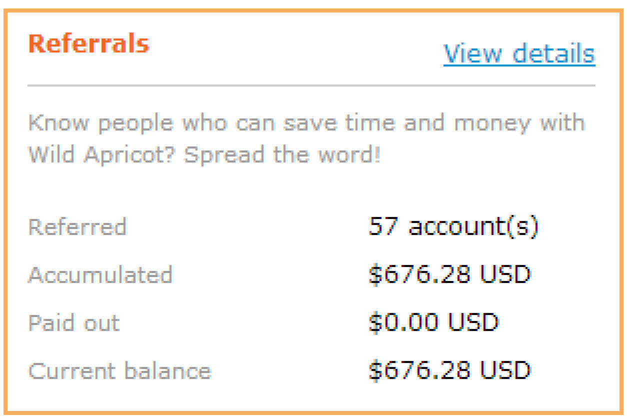
You can also click the **Share on Facebook** and **Share on Twitter** to post the referral link on your existing Facebook profile or Twitter account.

Once a referral uses the link to open a Wild Apricot site and upgrade to a paid plan, you will start earning a commission.

Viewing the referrals summary

Once one of your referrals signs up for a Wild Apricot account, the **Referrals** section of your Dashboard will display a summary of your referrals, including the number of referrals, how much you have accumulated in commissions, how much had been paid out to you, and how much remains in your balance.

Read more/less



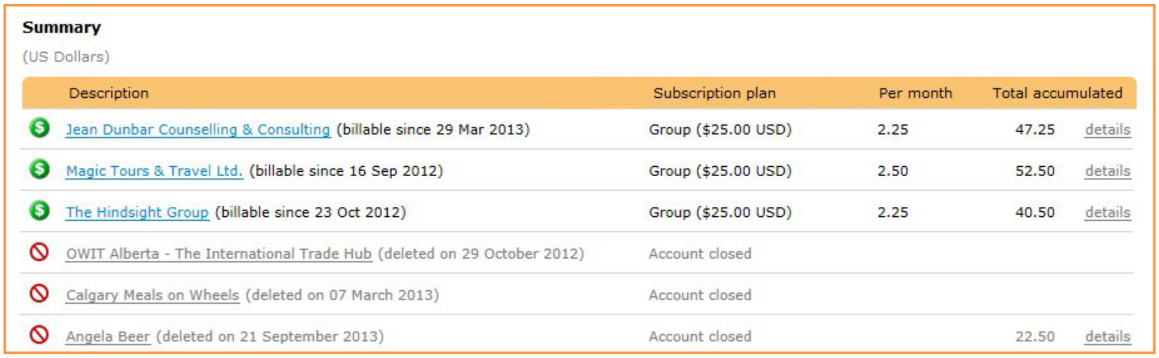
To view more information about your referrals, click the **View details** link within the **Referrals** section of your dashboard. You will be taken to the Referrals screen.

Viewing referral details

The Referrals screen displays a summary of your referrals – the accumulated commissions, the commissions paid out to you so far, and your current balance – along with a list of each individual referral.

Read more/less

All amounts displayed are in US funds.



Summary

(US Dollars)

	Description	Subscription plan	Per month	Total accumulated	
	Jean Dunbar Counselling & Consulting (billable since 29 Mar 2013)	Group ($25.00 USD)	2.25	47.25	details
	Magic Tours & Travel Ltd. (billable since 16 Sep 2012)	Group ($25.00 USD)	2.50	52.50	details
	The Hindsight Group (billable since 23 Oct 2012)	Group ($25.00 USD)	2.25	40.50	details
	OWIT Alberta - The International Trade Hub (deleted on 29 October 2012)	Account closed			
	Calgary Meals on Wheels (deleted on 07 March 2013)	Account closed			
	Angela Beer (deleted on 21 September 2013)	Account closed		22.50	details

For each referral, the following information is displayed:

- Name of the site
- Date the site was created
- Type of subscription plan
- Their monthly fee
- Your accumulated commission for this referral

The icon to the left of the referral indicates the kind of account. The following icons are used:

Icon	Meaning
	Active account with commissions
	Trial or free account
	Closed account

If a referral has signed up for a trial account, the referral will be listed but you won't begin accumulating commissions until they upgrade to a paid plan.

For more information on an individual referral, click the link under **Description**. A transaction log will appear, displaying information about the account and a list of each commission earned.

On this page:

Expand all sections

How to...

How to...

Add a blog page
Add a contact or member
Add a custom domain name
Add a donation form to another website
Add a Facebook Like box
Add a forum page
Add a forum summary to another website
Add a Google map
Add a membership bundle
Add a personalized fundraiser page

Customize donation confirmation email
Customize donation form
Customize event emails
Customize event fields
Customize event registration form
Customize forums using CSS
Customize invoice templates
Customize list of tenders
Customize membership fields
Customize page header background settings for themes
Customize the default membership emails
Customize the donation confirmation email
Customize the login area
Customize a theme
Define meta-tags
Delete a donation
Delete a member or contact
Delete your account
Design responsive pages
Display details for a specific event to another website
Edit a web page
Email event attendees
Email groups
Embed a blog on another website
Embed a forum on another website
Embed a Google drive doc
Embed a member application form on another website
Embed a member directory on another website
Embed audio on your site
Embed member profiles on another website
Embed photo galleries in your site
Enable anti-spam settings
Enable event waitlists
Encrypt website traffic
Export financial reports to QuickBooks
Find an invoice
Hide the RSS icon
Insert a document
Insert a fav icon
Insert a gadget
Insert a link
Insert a picture
Insert a table
Insert HTML or JavaScript
Integrate your Wild Apricot into another website
Issue manual invoice
Log into your account
Make a page invisible
Make menu option not clickable
Manage files using WebDAV
Manage site administrators
Manage undeliverable emails
Merge records
Modify a page template
Modify master layouts
Optimize your site for search engines
Override theme settings
Pay invoices
Print financial records
Print membership cards using mail merge
Print web pages

Error messages

Error messages

The following error messages may appear to administrators and/or visitors to your site. For more information on a particular message, including possible steps to resolve the issue, see below.

File type not supported

Cause:

- You have tried to drag and drop a file within the File management screen whose type is not currently supported.

Solution:

- Contact Support and we will consider supporting the file type, as long as it does not pose any security issues.

Please log in to continue

Cause:

- A visitor who is not currently logged in attempt to display a page with restricted access.

Solutions:

- The visitor logs in with valid credentials.
- An administrator changes the page access settings.

Site malfunction error

Cause:

- Wild Apricot is unable to load the parent theme after encountering an error with the current theme's theme overrides.

Solution:

- Log into Wild Apricot as an administrator, go to the **Theme overrides** screen and either 1) deactivate theme overrides entirely 2) disable individual overrides, or 3) rebuild the theme files. If the login box isn't available because of the site malfunction, you can login by adding **/sys/safelogin** to the end of your domain name. For example: http://www.example.com/sys/safelogin.

Sorry, we were unable to process an upgrade due to a technical problem

Cause:

- A rare case that might occur when a payment processor (e.g. Paypal) gets very busy and is unable to process your upgrade.

Solution:

- Contact Wild Apricot technical support. Your upgrade request will be put on hold until you do.

You have requested an encrypted page that contains some unencrypted information

Cause:

- A page accessed using a secure connection – a URL beginning with *https* – includes references to resources that begin with *http*.

Solution:

- Change the URL of the referenced resource(s) from *http* to *https*.

On this page:

Release history

Release history

So far, we have released

- 71 major updates of the browser application of Wild Apricot, and
- 12 updates of our mobile app.

Latest browser application release

5.12 – Released on August 28th, 2017

Click here to expand...

5.12 – Released on August 28th, 2017

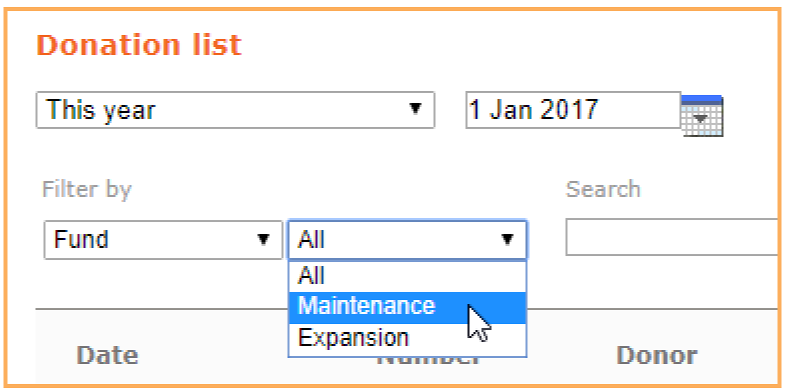
The Version 5.12 release of Wild Apricot consists of the following changes and enhancements.

- Donations
- Exporting financial details
- Events
- Members and contacts
- Email
- reCAPTCHA in place of Captcha on blogs and forums
- Bug fixes

The 5.12 release will be published in batches over a space of a week to ensure stability. So, some changes may not appear on your account for up to 7 days after the release date.

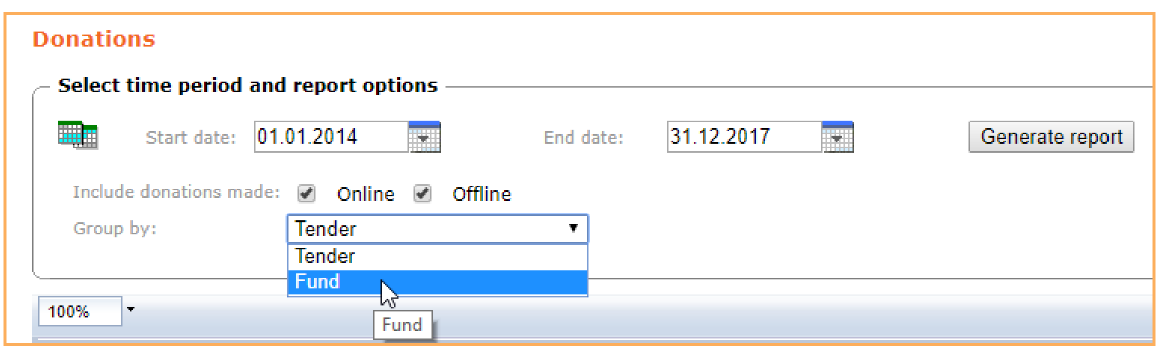
Donations

- You can now filter the Donations list by date, or by the value of a custom donation field, such as fund.



You can filter by any custom donation field of the dropdown or radio buttons type.

- Now, the donations report can be grouped not just by tender, but also by any donation field of the dropdown or radio buttons type.



The donations report is now also available from the financial reports screen.

Exporting financial details

When exporting financial details, options have been added to include more transaction details, as well as common field values such as address. In addition, taxes collected will be stored in separate columns from base charges.

When exporting invoices, you can now choose whether to include or exclude the following:

- All common fields
- Origin details (Event name/date, Registration type, Membership level)
- All taxes
- Payment date

When exporting payments and refunds, you can now choose whether to include or exclude the following:

- All common fields
- Invoice date
- Invoice origin
- Invoice origin details
- Event registration type

When exporting donations, you can now choose whether to include or exclude the following:

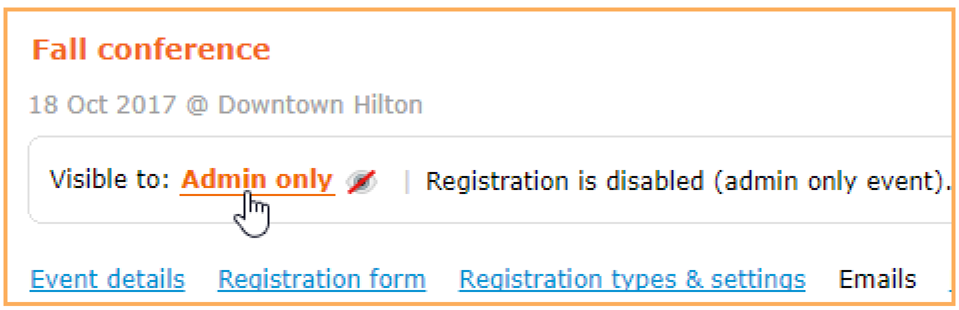
- Contact ID

These extra options appear only when exporting to a spreadsheet, not when exporting to QuickBooks.

Events

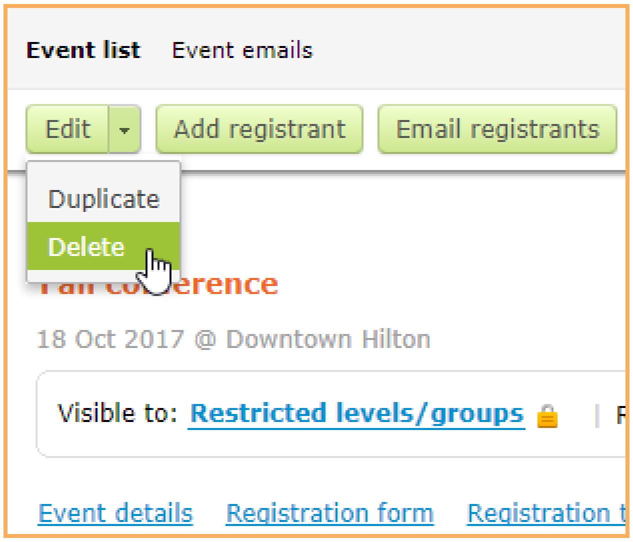
The following enhancements have been made to the Events module.

- The option to set the event access permissions is now labelled **Visible to**.

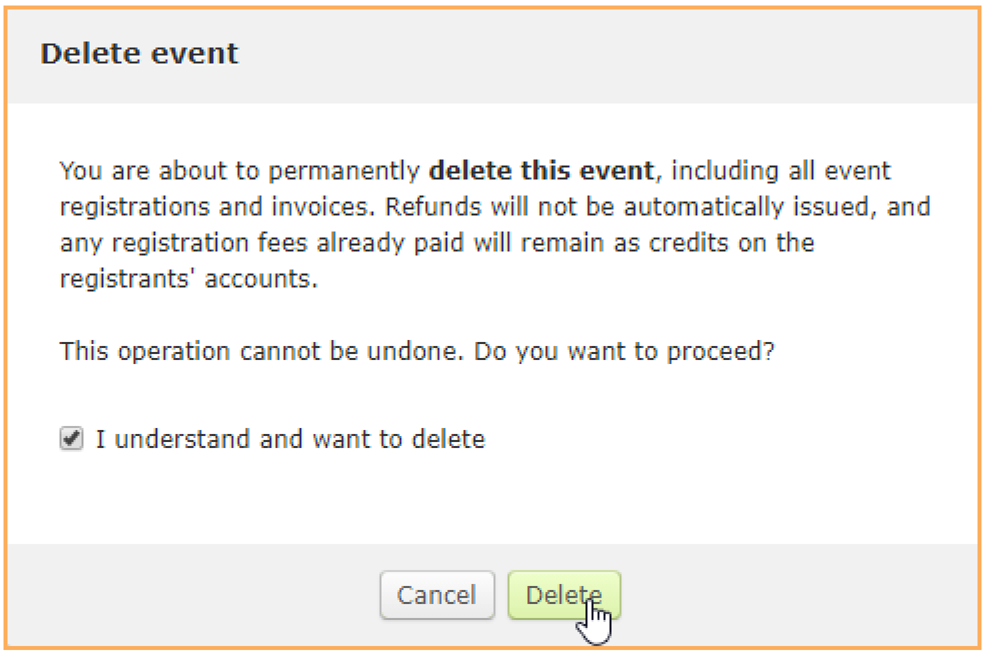


  Previously, the option simply identified the current access setting.

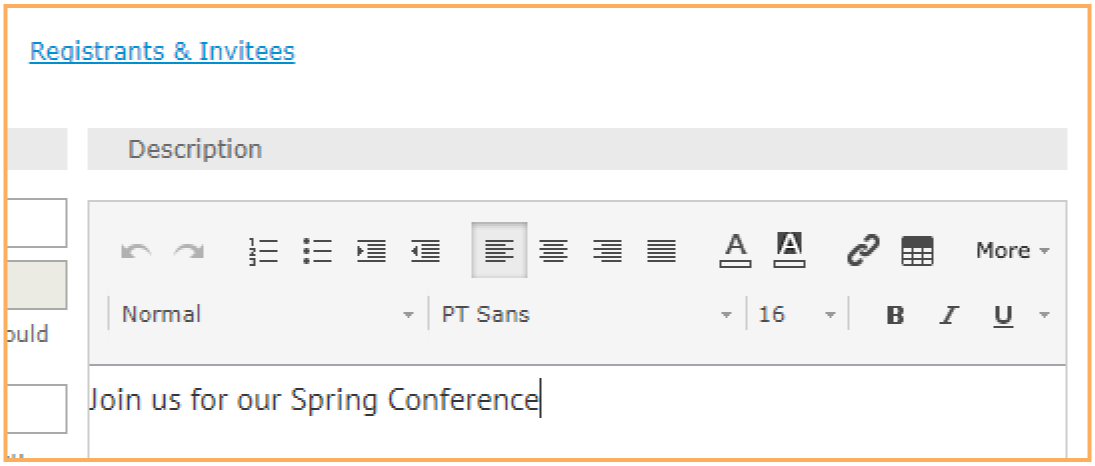
- The options to duplicate and delete events have now been combined into an **Edit** dropdown menu.



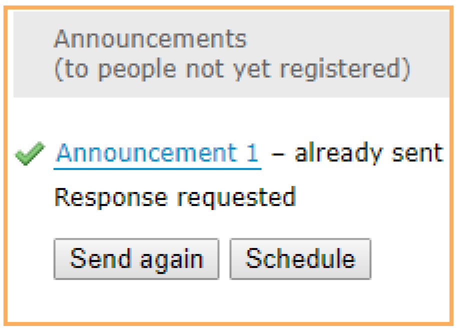
- The confirmation dialog that appears after you choose the option to delete an event with registrations has been revised to clarify the consequences of deleting an event.



- When editing event details, the content editor toolbar now appears within the **Description** box, instead of at the top of the screen.

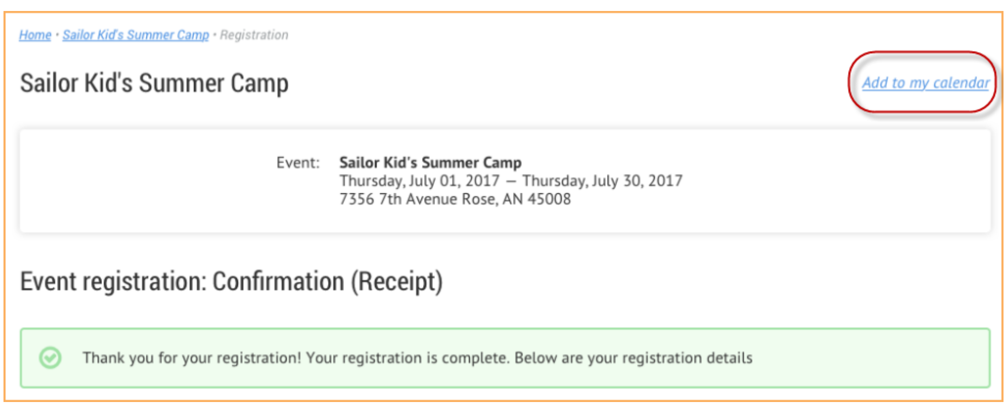


- Event announcements that contain the {Registration buttons} macro will appear on the **Emails** tab with the phrase *Response requested* below the email link.

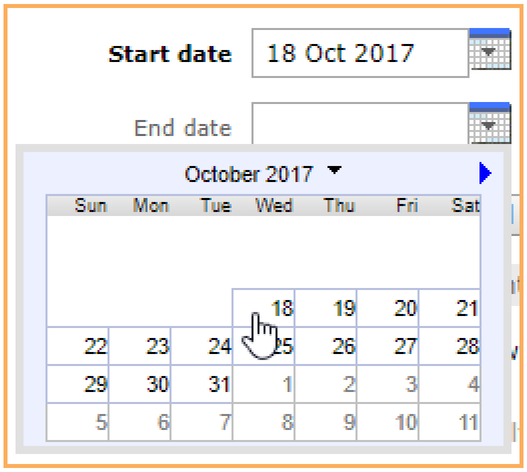


- If you click the **Send now** button to send announcements for an event for which registration is not currently available, you will be warned that recipients will be unable to register for the event.

- An **Add to calendar** link now appears on the event registration confirmation screen.

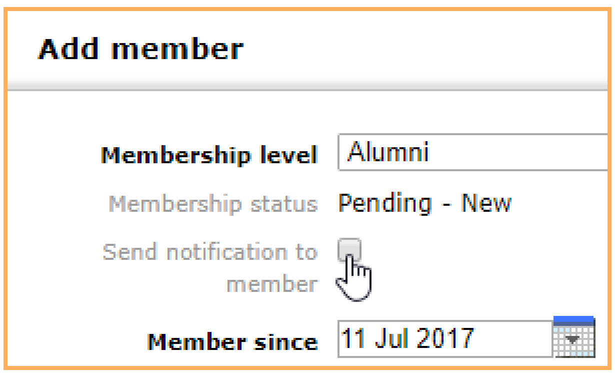


- When specifying the end date for an event, the calendar control now begins at the start date, saving you from having to scroll from the current date.

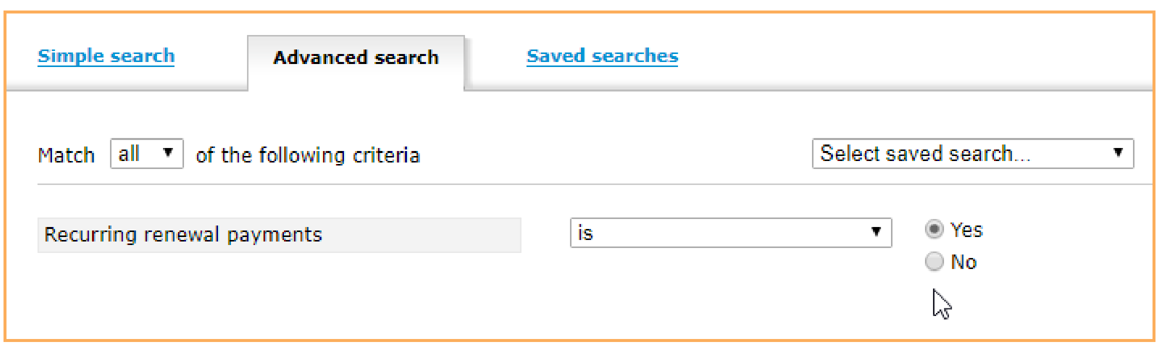


Members and contacts

- An option is now available when adding a new member or assigning membership to a contact to send the application initiation email to the member.



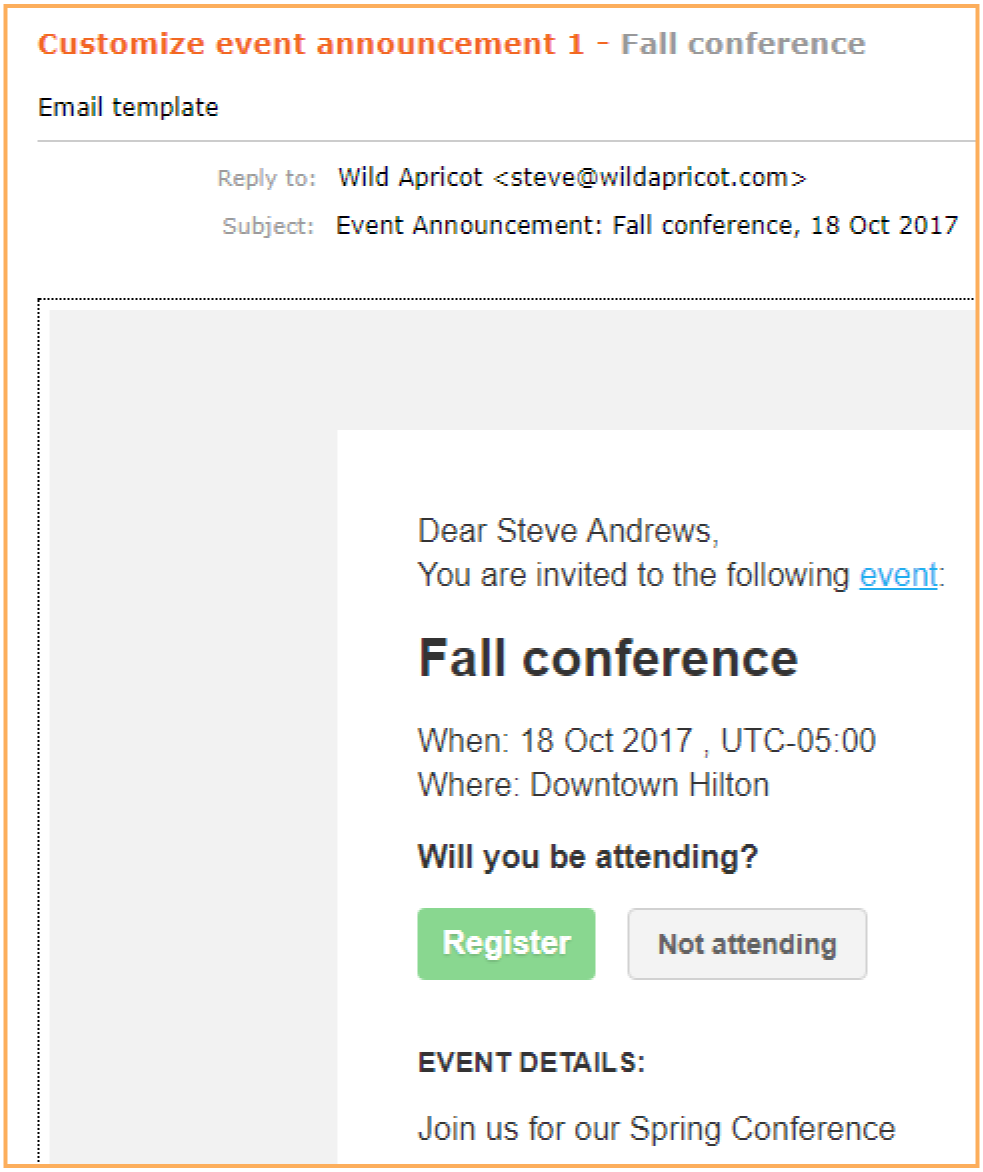
- A new search criteria has been added allowing you to search for members with recurring payment profiles.



- When a member's renewal date or membership level is changed manually by an administrator, notes will be added to the **Intern al use** area indicating who made the change and when.

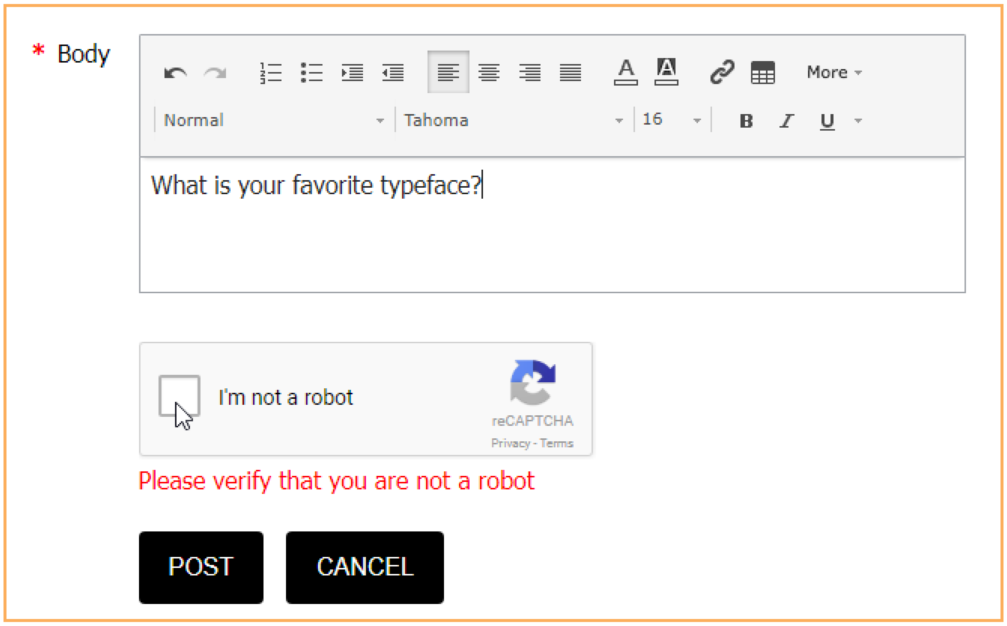
Email

When customizing various system emails, the preview pane now displays actual data in place of macros.



reCAPTCHA in place of Captcha on blogs and forums

To reduce spam, Wild Apricot is using reCAPTCHA in place of Captcha for security checks on blog and forum pages. reCaptcha is considered to be easier to use and harder to bypass.



For administrators, no changes are required. If you've already enabled the existing Captcha for your blogs or forums, then it will be automatically replaced by reCAPTCHA.

For visitors to your site, the appearance is slightly different but the overall behavior is the same. The main difference is that new reCAPTCHA is tougher for spambots to crack, providing better anti-spam protection.

Bug fixes

A number of bugs have been fixed, including but not limited to, the following:

- Saving sent email as new email fails if there are too many recipients
- Payments report displays no data if only the **Online** and **Offline** options are checked
- Roboto Slab and Lato fonts not being displayed in email wizard
- Registrant unable to register for 30+ event sessions
- Images added to blog post disappearing in Firma theme
- Duplicate email messages sent to multiple recipients
- Clicking on blog post author name leads to *Page not found* error
- Advanced search from Members screen does not return any results
- @ sign in folder name causes error in Insert picture dialog
- {Contact_BalanceAmount} macro returns wrong amount
- Errors with recurring payments were not logged
- Recurring payments not charged on Stripe and Authorize.Net
- Merging records produces duplicate MembershipProfileIDs
- **Invoice me** button appears for free levels with **Online only** payment option selected
- Clicking the **Email new password** button produces error if contact is unsubscribed from manual emails
- Administrators cannot edit their membership fields in admin view
- Insert document wizard opens Pictures folder rather than Documents folder
- **Level last changed** field is not updating if the level was switched automatically or manually by admin
- Advanced search of members with archived or suspended record status returns no results
- Company name is truncated when exporting to QuickBooks
- Custom membership field cannot be cleared through importing

Release 5.12

Latest mobile app release

Mobile 2.1 – August 17, 2017 (both iOS and Android)

Click here to expand...

Mobile 2.1 – August 17, 2017 (both iOS and Android)

Both the iOS and Android versions of the application were updated. A number of bug fixes were made.

Mobile 2.1

See also:

Product roadmap
– current development plans and upcoming releases (if any)

Suggesting new features
– instructions on how to share your ideas and comments

Browser application releases
– 71 starting from 2006

Mobile app releases
– 12 starting from 2014

Browser application release history

Browser application release history

We've published **71 major releases of our browser application** and 12 of mobile app. For future plans and current development status, see Product roadmap.

- Release 5.12 — 5.12 – Released on August 28th, 2017
- Release 5.11 — 5.11 – Released on May 15th, 2017
  - Update 5.11.3
  - Update 5.11.2
  - Update 5.11.1
- Release 5.10 — 5.10 – Released on March 13th, 2017
  - Update 5.10.2 — 5.10.2 – Released on April 11, 2017
  - Update 5.10.1 — 5.10.1 – Released on March 27, 2017
- Release 5.9 — 5.9 – Released on December 6, 2016
  - Update 5.9.2 — 5.9.2 – Released on January 16, 2017
  - Update 5.9.1 — 5.9.1 – Released on December 21, 2016
- Release 5.8 — 5.8 – Released on August 24, 2016
  - Update 5.8.3 — 5.8.3 – Released on November 1st, 2016
  - Update 5.8.2 — 5.8.2 – Released October 19th, 2016
  - Update 5.8.1 — 5.8.1 – Released on September 12th, 2016
- Release 5.7 — 5.7 – Released on December 7, 2015
  - Update 5.7.7 — 5.7.7 – Released on June 6th, 2016
  - Update 5.7.6 — 5.7.6 – Released on May 10th, 2016
  - Update 5.7.5 — 5.7.5 – Released on April 27th, 2016
  - Update 5.7.4 — 5.7.4 – Released March 21, 2016
  - Update 5.7.3 — 5.7.3 – Released February 15th, 2016
  - Update 5.7.2 — 5.7.2 – Released on January 25th, 2016
  - Update 5.7.1 — 5.7.1 – Released on December 21st, 2015
- Release 5.6 — 5.6 – Released on October 5, 2015
  - Update 5.6.3 — 5.6.3 – Released on November 11th, 2015
  - Update 5.6.2 — 5.6.2 – Released on October 28th, 2015
  - Update 5.6.1 — 5.6.1 – Released on October 13th, 2015
- Release 5.5 — 5.5 – Released on August 5, 2015
  - Update 5.5.1 — 5.5.1 – Released on August 17th, 2015

- Release 5.4 — 5.4 – Released on June 15, 2015
  - Update 5.4.2 — 5.4.2 – Released on July 9th, 2015
  - Update 5.4.1 — 5.4.1 – Released on June 30, 2015
- Release 5.3 — 5.3 – Released on April 8, 2015
  - Update 5.3.3 — 5.3.3 – Released on May 25, 2015
  - Update 5.3.2 — 5.3.2 – Released on April 27, 2015
  - Update 5.3.1 — 5.3.1 – Released on April 16th, 2015
- Release 5.2 — 5.2 – Released on December 10, 2014
  - Update 5.2.4 — 5.2.4 – Released on March 4, 2015
  - Update 5.2.3 — 5.2.3 – Released on February 9th, 2015
  - Update 5.2.2 — 5.2.2 – Released on January 15, 2015
  - Update 5.2.1 — 5.2.1 – Released on December 24, 2014
- Release 5.1 — 5.1 – Released on July 31, 2014
  - Update 5.1.5 — 5.1.5 – Released on November 19, 2014
  - Update 5.1.4 — 5.1.4 – Released on November 5, 2014
  - Update 5.1.3 — 5.1.3 – Released on September 30, 2014
  - Update 5.1.2 — 5.1.2 – Released on September 4, 2014
  - Update 5.1.1 — 5.1.1 – Released on August 19, 2014
- Release 5.0 — 5.0 – Released on April 19, 2014
  - Transitioning to Version 5
- Release 4.6 — Released on August 27, 2013
- Release 4.5 — Released on April 3, 2013
- Release 4.4 — Released on July 8, 2012
- Release 4.3 — Released on December 14, 2011
  - Changes to Emails in 4.3
  - Getting ready for new version 4.3
  - Key Payment Changes from version 4.2 to 4.3
- Release 4.2 — Released on May 18 2011
- Release 4.1 — Released on January 12, 2011
- Release 4.0 — Released on September 26, 2010
- Release 3.4 — Released on March 29th, 2010
- Release 3.3 — Released on December 14th, 2009
- Release 3.2 — Released on October 1st, 2009
- Release 3.1 — Released on July 29th, 2009
- Release 3.0 — Released on May 20th, 2009
- Release 2.39 — Released on February 26th, 2009
- Release 2.38 — Released on December 25th, 2008
- Release 2.37 — Released on November 11th, 2008
- Release 2.36 — Released on September 23rd, 2008
- Release 2.35 — Released on August 11th, 2008
- Release 2.34 — Released on June 26th, 2008
- Release 2.33 — Released on May 22nd, 2008
- Release 2.32 — Released on April 10th, 2008
- Release 2.31 — Released on March 6th, 2008
- Release 2.30 — Released on February 6th, 2008
- Release 2.29 — Released on January 16th, 2008
- Release 2.28 — Released on December 25, 2007
- Release 2.27 — Released on December 6, 2007
- Release 2.26 — Released on November 13, 2007
- Release 2.25 — Released on October 29, 2007
- Release 2.24 — Released on October 1, 2007
- Release 2.23 — Released on September 12, 2007
- Release 2.22 — Released on August 17, 2007
- Release 2.21 — Released on July 20, 2007

- Release 2.20 — Released on June 28, 2007
- Release 2.19 — Released on June 1, 2007
- Release 2.18 — Released on May 11, 2007
- Release 2.17 — Released on April 27, 2007
- Release 2.16 — Released on April 6, 2007
- Release 2.15 — Released on March 19, 2007
- Release 2.14 — Released on March 2, 2007
- Release 2.13 — Released on February 9, 2007
- Release 2.12 — Released on January 25, 2007
- Release 2.11 — Released on December 28, 2006
- Release 2.10 — Released on December 21, 2006
- Release 2.09 — Released on December 14, 2006
- Release 2.08 — Released on November 29, 2006
- Release 2.07 — Released on November 2, 2006
- Release 2.06 — Released on October 18, 2006
- Release 2.05 — Released on September 22, 2006
- Release 2.03 — Released on August 23, 2006
- Release 2.02 — Released on August 4, 2006
- Release 2.01 — Released on July 11, 2006
- Release 2.00 — Going Live! Released on June 30, 2006
- Release 1.09 — Internal release, June 2006
- Release 1.08 — Internal release, June 2006
- Release 1.07 — Internal release, June 2006
- Release 1.06 — 1.06 - Internal release, June 2006
- Release 1.05 — 1.05 - Internal update, May 2006
- Release 1.04 — Internal release, May 2006
- Release 1.00 — Internal release, April 2006

Release 5.12

5.12 – Released on August 28th, 2017

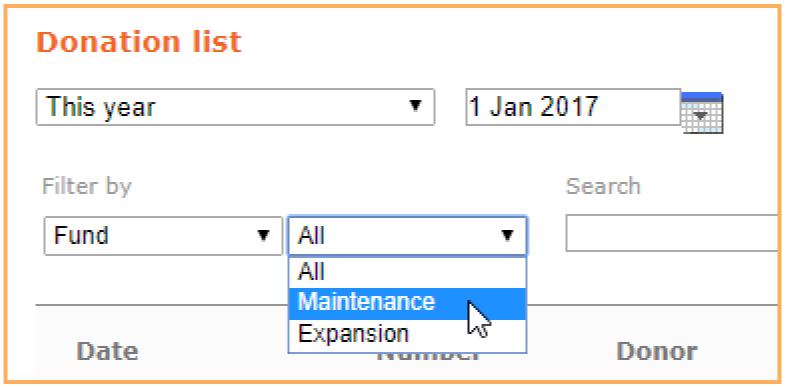
The Version 5.12 release of Wild Apricot consists of the following changes and enhancements.

- Donations
- Exporting financial details
- Events
- Members and contacts
- Email
- reCAPTCHA in place of Captcha on blogs and forums
- Bug fixes

> The 5.12 release will be published in batches over a space of a week to ensure stability. So, some changes may not appear on your account for up to 7 days after the release date.

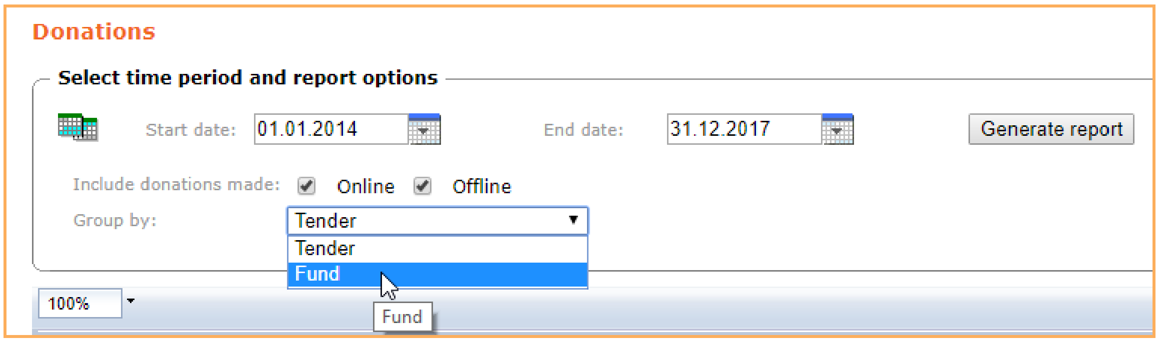
Donations

- You can now filter the Donations list by date, or by the value of a custom donation field, such as fund.



You can filter by any custom donation field of the dropdown or radio buttons type.

- Now, the donations report can be grouped not just by tender, but also by any donation field of the dropdown or radio buttons type.



The donations report is now also available from the financial reports screen.

Exporting financial details

When exporting financial details, options have been added to include more transaction details, as well as common field values such as address. In addition, taxes collected will be stored in separate columns from base charges.

When exporting invoices, you can now choose whether to include or exclude the following:

- All common fields
- Origin details (Event name/date, Registration type, Membership level)
- All taxes
- Payment date

When exporting payments and refunds, you can now choose whether to include or exclude the following:

- All common fields
- Invoice date
- Invoice origin
- Invoice origin details
- Event registration type

When exporting donations, you can now choose whether to include or exclude the following:

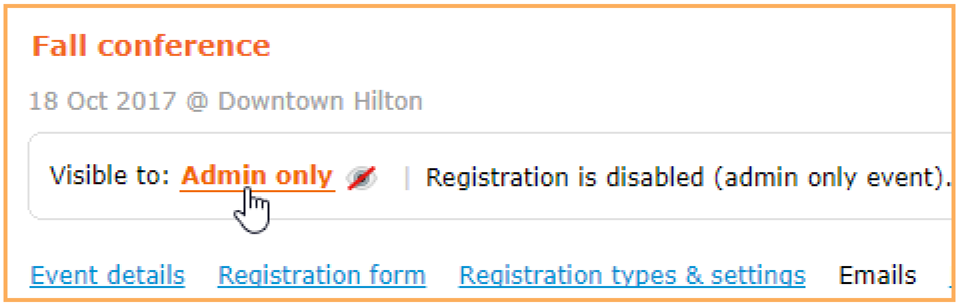
- Contact ID

> ⚠ These extra options appear only when exporting to a spreadsheet, not when exporting to QuickBooks.

Events

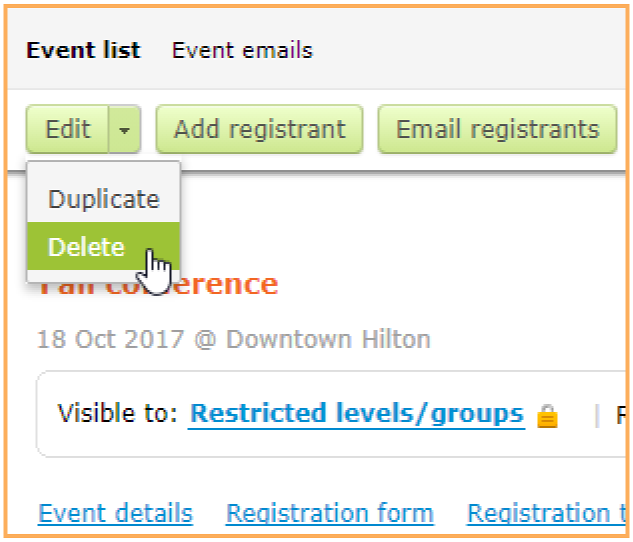
The following enhancements have been made to the Events module.

- The option to set the event access permissions is now labelled **Visible to**.

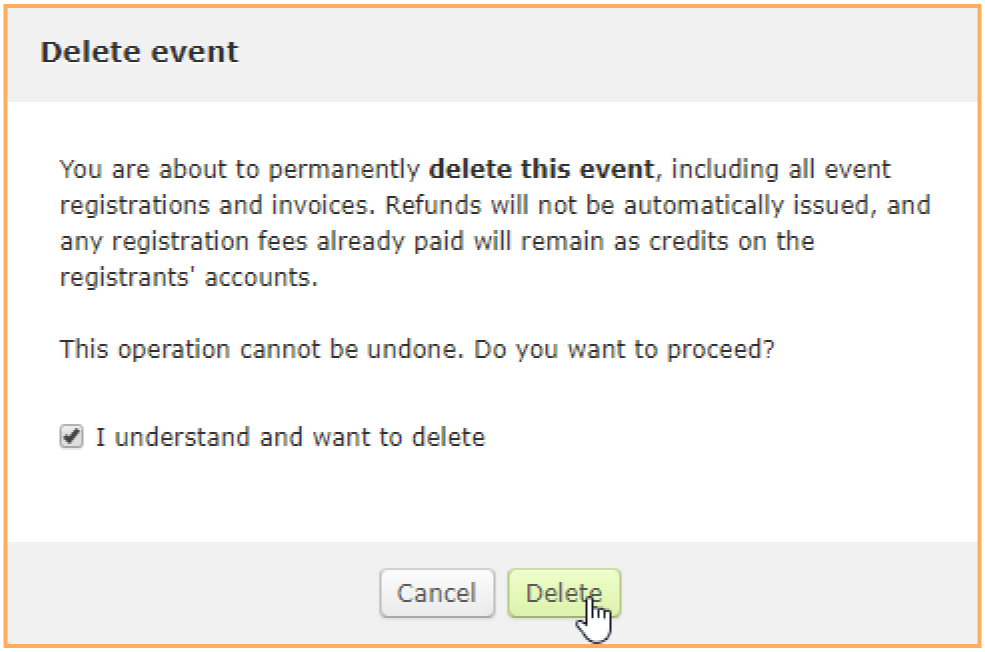


Previously, the option simply identified the current access setting.

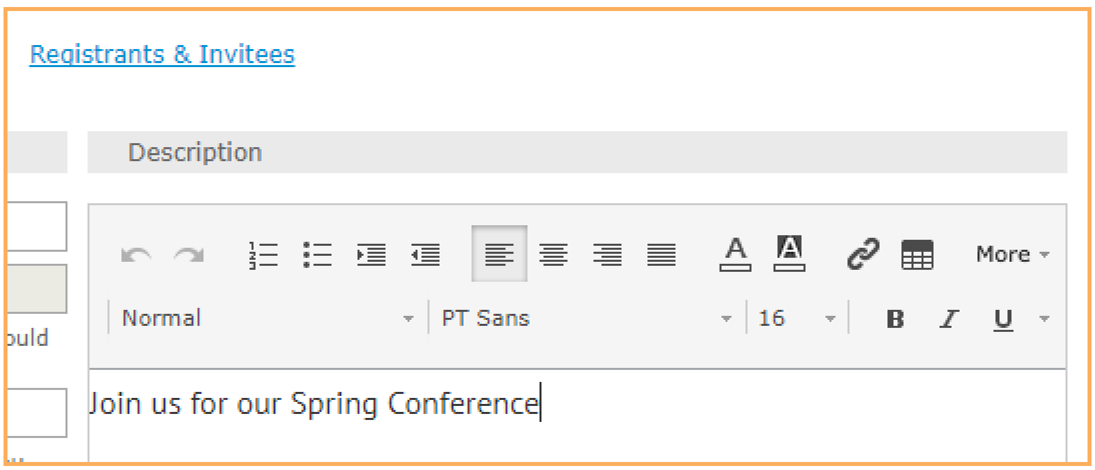
- The options to duplicate and delete events have now been combined into an **Edit** dropdown menu.



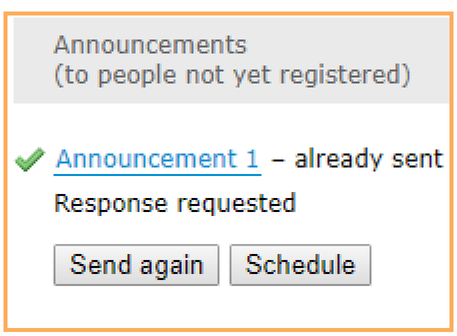
- The confirmation dialog that appears after you choose the option to delete an event with registrations has been revised to clarify the consequences of deleting an event.



- When editing event details, the content editor toolbar now appears within the **Description** box, instead of at the top of the screen.

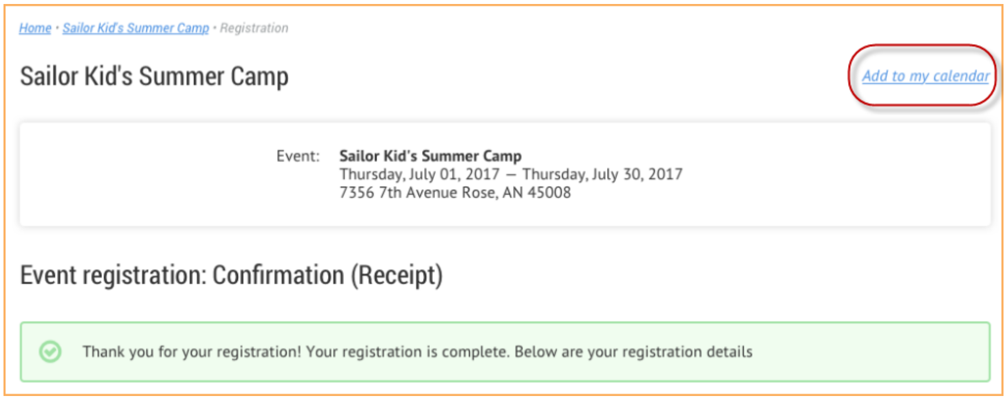


- Event announcements that contain the {Registration buttons} macro will appear on the **Emails** tab with the phrase *Response requested* b elow the email link.

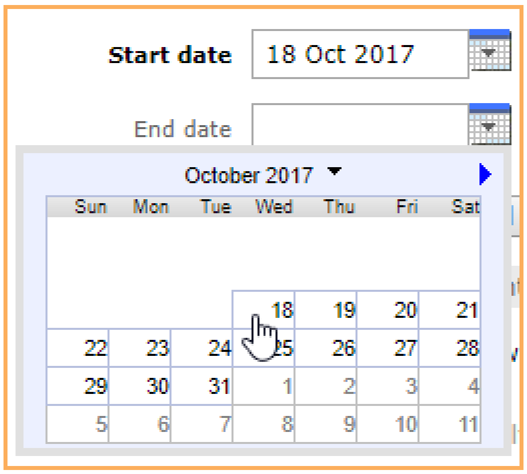


- If you click the **Send now** button to send announcements for an event for which registration is not currently available, you will be warned that recipients will be unable to register for the event.

- An **Add to calendar** link now appears on the event registration confirmation screen.

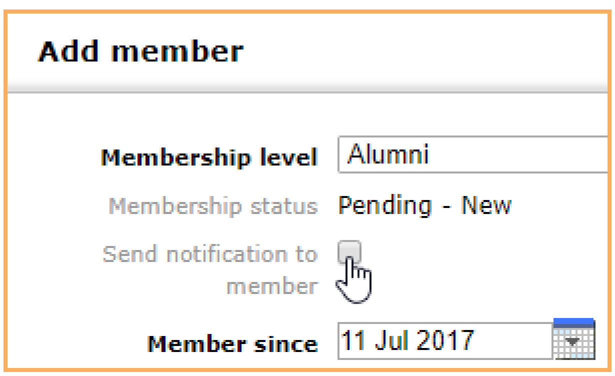


- When specifying the end date for an event, the calendar control now begins at the start date, saving you from having to scroll from the current date.

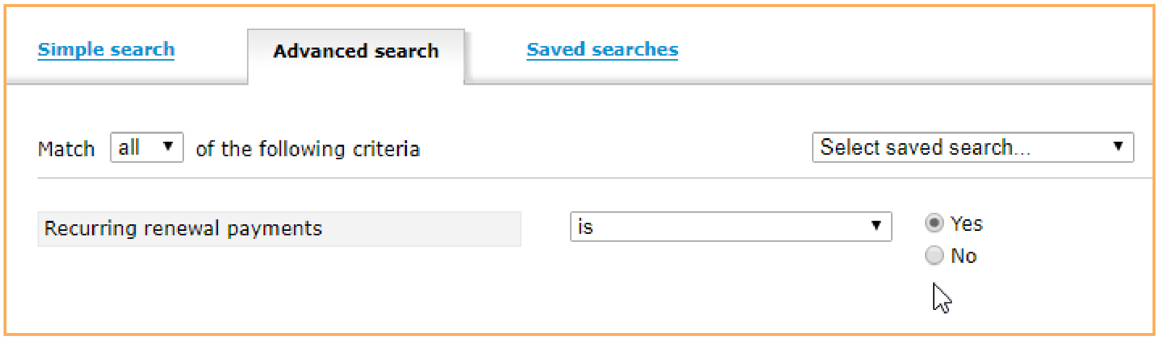


Members and contacts

- An option is now available when adding a new member or assigning membership to a contact to send the application initiation email to the member.



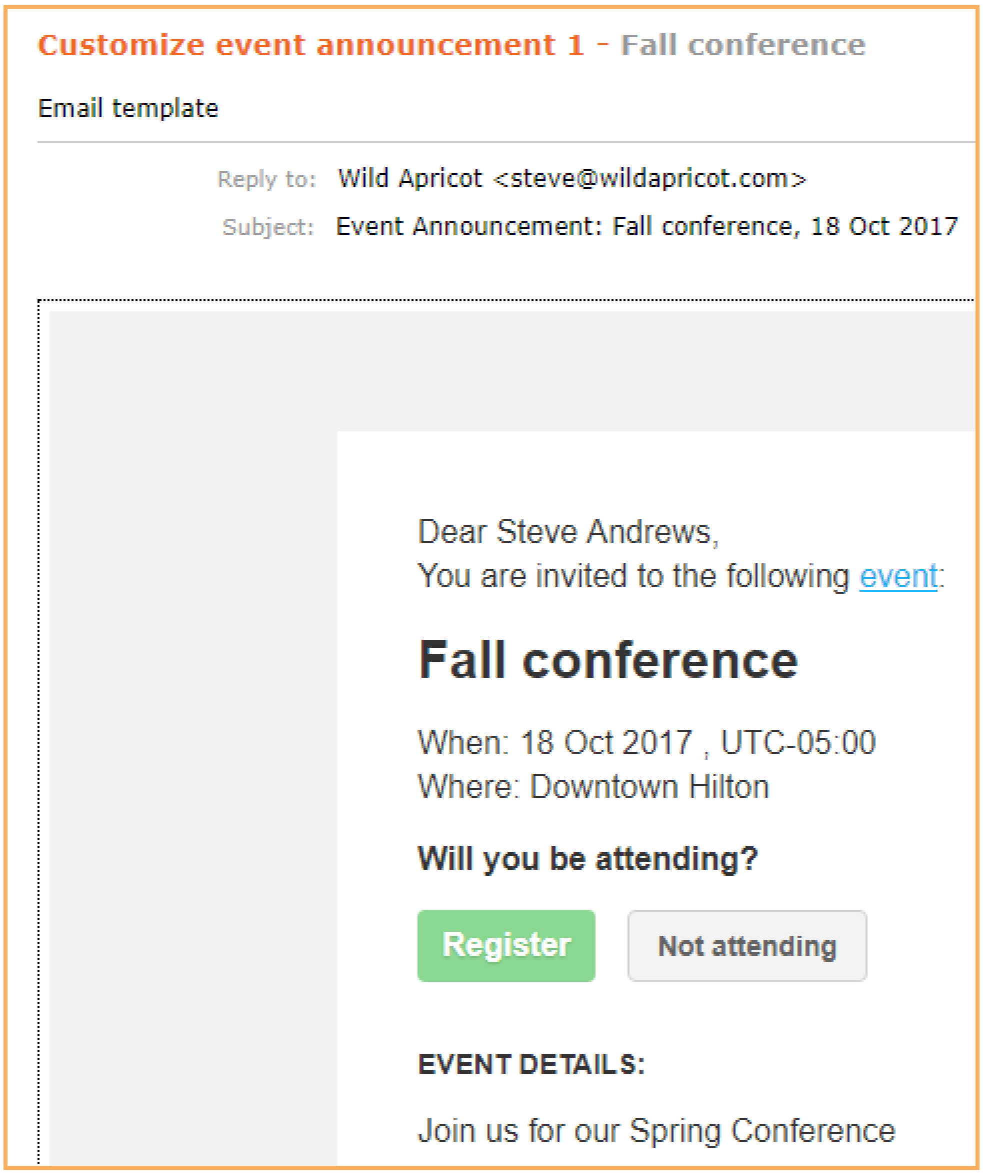
- A new search criteria has been added allowing you to search for members with recurring payment profiles.



- When a member's renewal date or membership level is changed manually by an administrator, notes will be added to the **Internal use** area indicating who made the change and when.

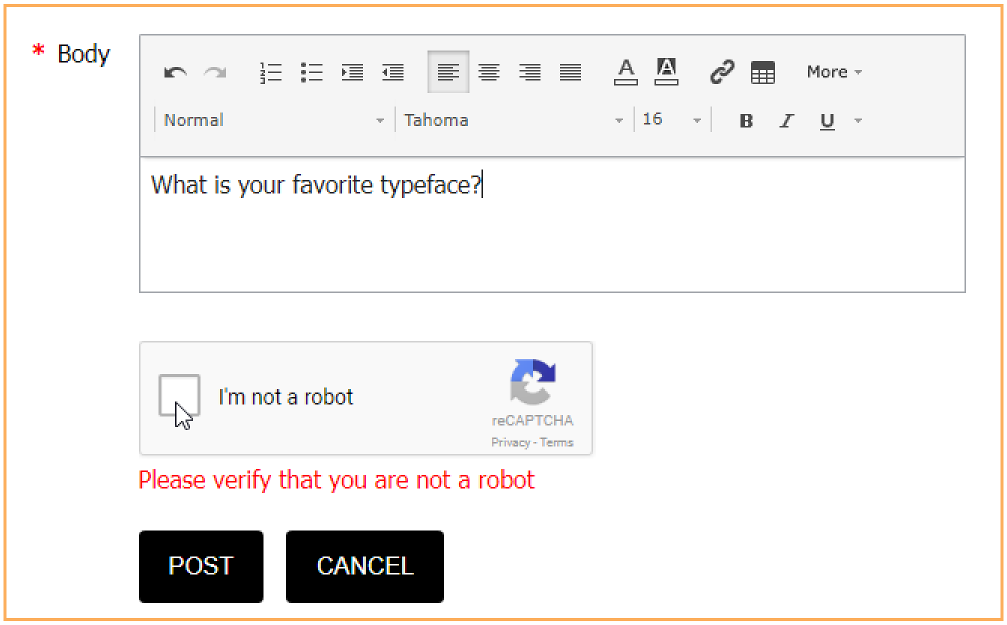
Email

When customizing various system emails, the preview pane now displays actual data in place of macros.



reCAPTCHA in place of Captcha on blogs and forums

To reduce spam, Wild Apricot is using reCAPTCHA in place of Captcha for security checks on blog and forum pages. reCaptcha is considered to be easier to use and harder to bypass.



For administrators, no changes are required. If you've already enabled the existing Captcha for your blogs or forums, then it will be automatically replaced by reCAPTCHA.

For visitors to your site, the appearance is slightly different but the overall behavior is the same. The main difference is that new reCAPTCHA is tougher for spambots to crack, providing better anti-spam protection.

Bug fixes

A number of bugs have been fixed, including but not limited to, the following:

- Saving sent email as new email fails if there are too many recipients
- Payments report displays no data if only the **Online** and **Offline** options are checked
- Roboto Slab and Lato fonts not being displayed in email wizard
- Registrant unable to register for 30+ event sessions
- Images added to blog post disappearing in Firma theme
- Duplicate email messages sent to multiple recipients
- Clicking on blog post author name leads to *Page not found* error
- Advanced search from Members screen does not return any results
- @ sign in folder name causes error in Insert picture dialog
- {Contact_BalanceAmount} macro returns wrong amount
- Errors with recurring payments were not logged
- Recurring payments not charged on Stripe and Authorize.Net
- Merging records produces duplicate MembershipProfileIDs
- **Invoice me** button appears for free levels with **Online only** payment option selected
- Clicking the **Email new password** button produces error if contact is unsubscribed from manual emails
- Administrators cannot edit their membership fields in admin view
- Insert document wizard opens Pictures folder rather than Documents folder
- **Level last changed** field is not updating if the level was switched automatically or manually by admin
- Advanced search of members with archived or suspended record status returns no results
- Company name is truncated when exporting to QuickBooks
- Custom membership field cannot be cleared through importing

Release 5.11

5.11 – Released on May 15th, 2017

The Version 5.11 release of Wild Apricot consists of the following changes and enhancements.

- Post-release updates (latest: July 24, 2017)
- Discounts for membership renewals and level changes

- Choose fields to appear on donation forms
- Admins can add contact to event waitlist
- Fewer required fields when creating events
- Opt-in mechanism for CASL
- Hide Member ID field from member profiles
- Bundle admins in alphabetical order when adding to bundle
- Bug fixes

SHOW ME (4:10)

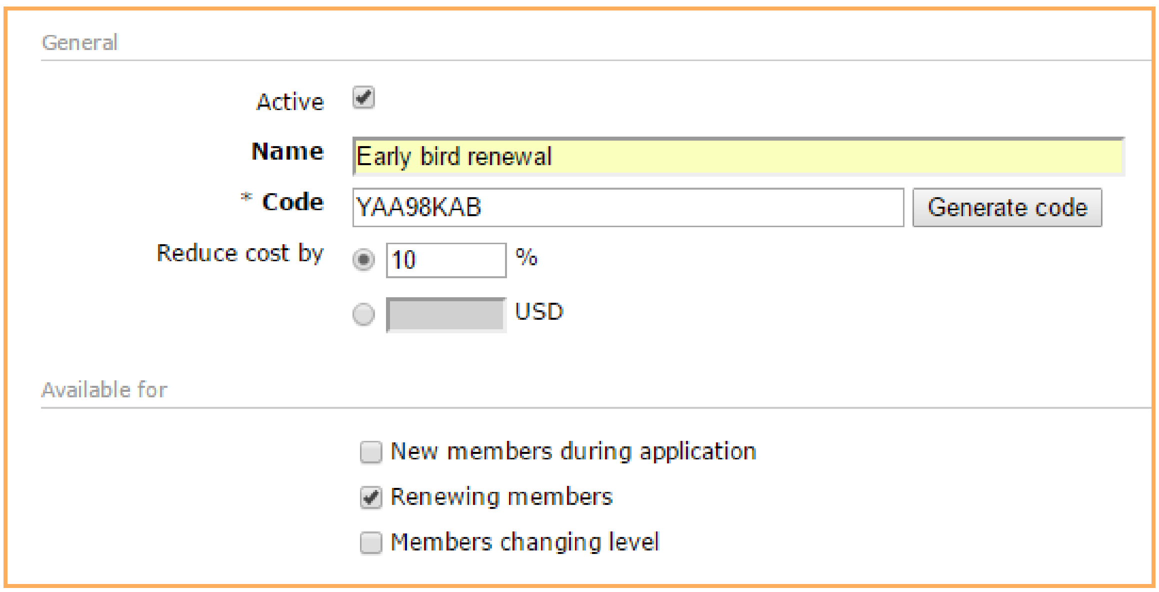
Post-release updates (latest: July 24, 2017)

The following updates to Version 5.11 have been released.

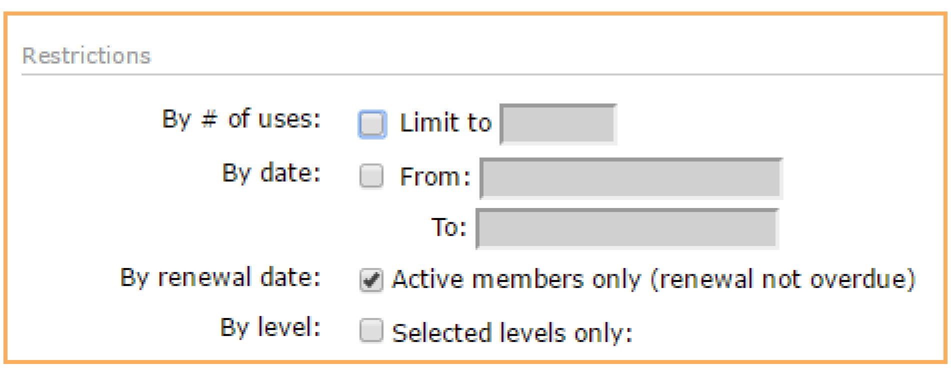
- 5.11.3 – July 24, 2017 (bug fixes)
- 5.11.2 – June 19, 2017 (**Archive contacts** button removed, bug fixes)
- 5.11.1 – May 29, 2017 (opt-in enhancement, bug fixes)

Discounts for membership renewals and level changes

Discounts can now be applied to membership renewals and member level changes, as well as new membership applications. When you set up your discounts, you can indicate whether you want the discount to be available for new membership, membership renewals, and member level changes.

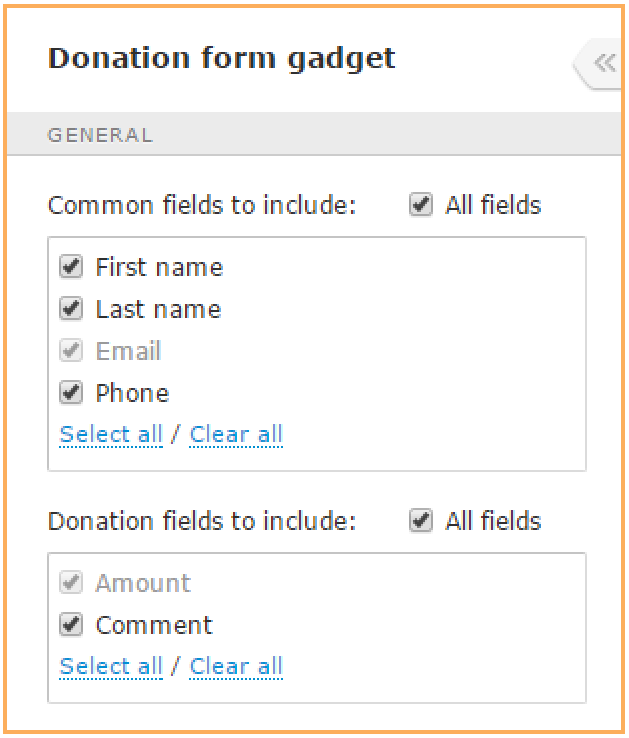


You can now also restrict discount use to active members only – excluding those whose renewal is overdue.



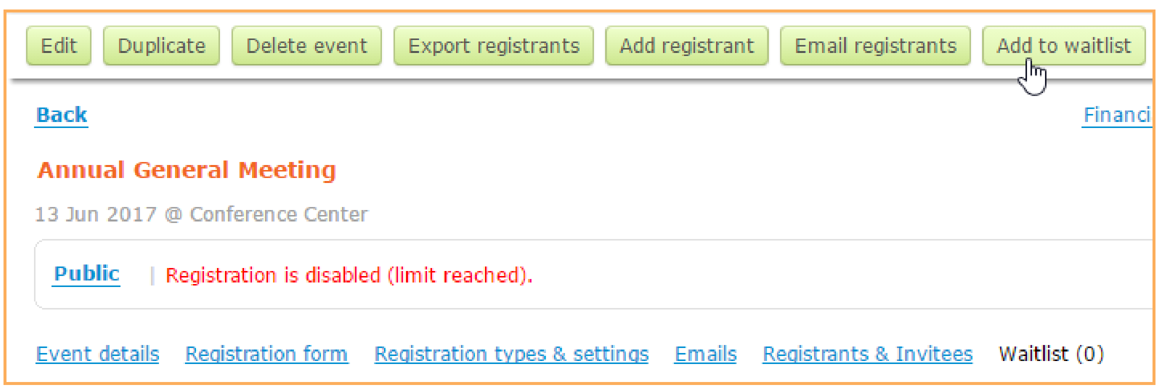
Choose fields to appear on donation forms

You can now control which common fields and donation fields appear on donation forms. Within the settings for the donation gadget, you choose which fields you want to include on the form.



Admins can add contact to event waitlist

Administrators can now add a contact to the event waitlist. When the waitlist is enabled, you can click the **Add to waitlist** button from any event tab to select a contact to be added to the waitlist.



Once on the waitlist, the contact will not receive any further announcements for this event.

Fewer required fields when creating events

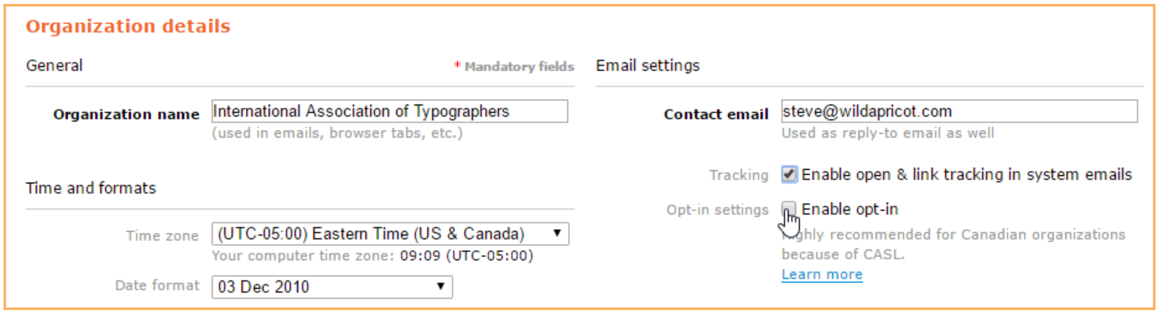
Previously, you had to enter the event title, location, start date, and description before you could save the event. Now, you only need to enter the event title and start date.

Opt-in mechanism for CASL

You can enable an opt-in mechanism so that contacts can expressly provide their consent to receive emails from your organization. This is a key component in complying with anti-spam legislation, particularly the Canadian Anti-Spam Law (CASL) . Penalties for non-compliance come into force on July 1, 2017, with a maximum penalty of $1 million for individuals and $10 million for businesses.

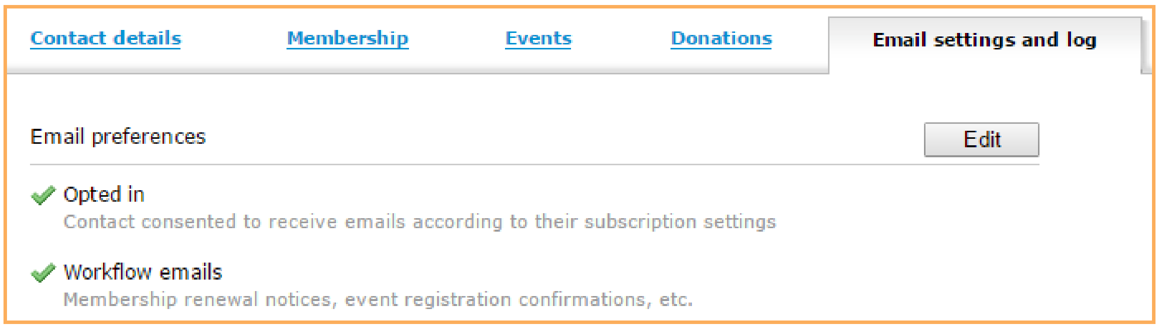
To enable the opt-in mechanism, follow these steps:

1. Choose the **Organization** option under the **Dashboard** menu.
2. On the Organization details screen that appears, check the **Enable opt-in** option.

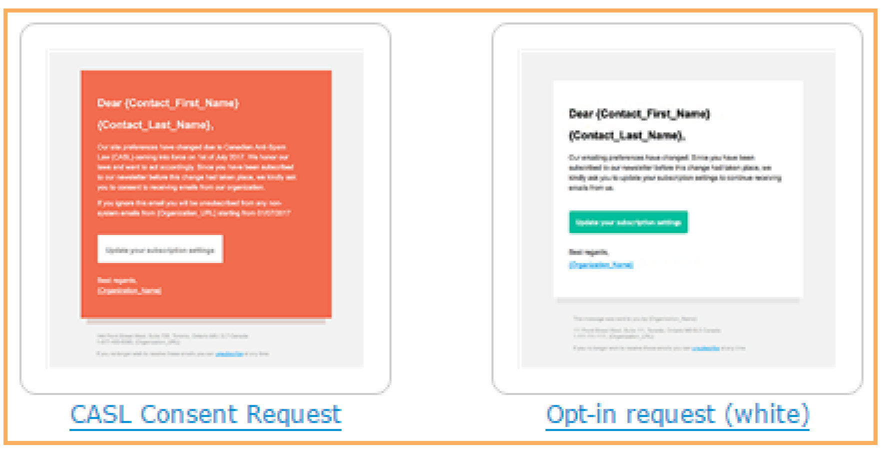


3. Click the **Save** button to save your changes.

With the opt-in mechanism enabled, you can send consent request emails to your contacts, then track their opt-in status from each contact's **Ema il settings and log** tab.



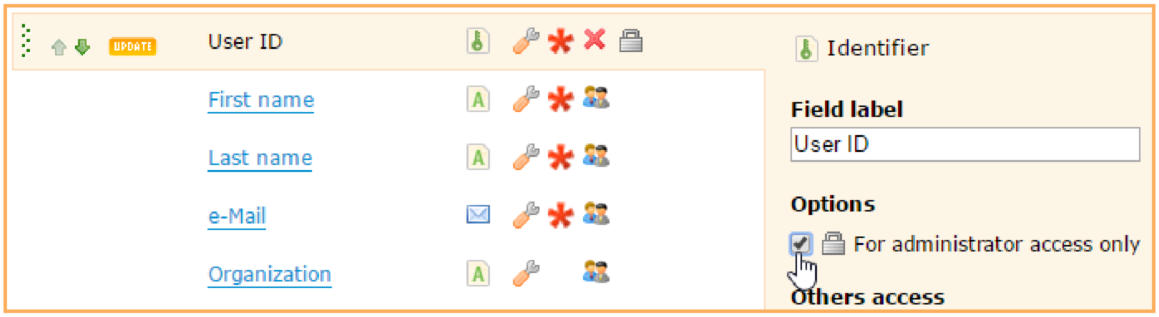
Two new email templates have been added to help you communicate to your contacts about opting in: one that specifically addresses CASL, and one for generic opt-in requests.



In the future, following the 5.12 release, enabling the opt-in mechanism will also result in a checkbox requesting consent being added to all forms that prompt new contacts to enter an email address.

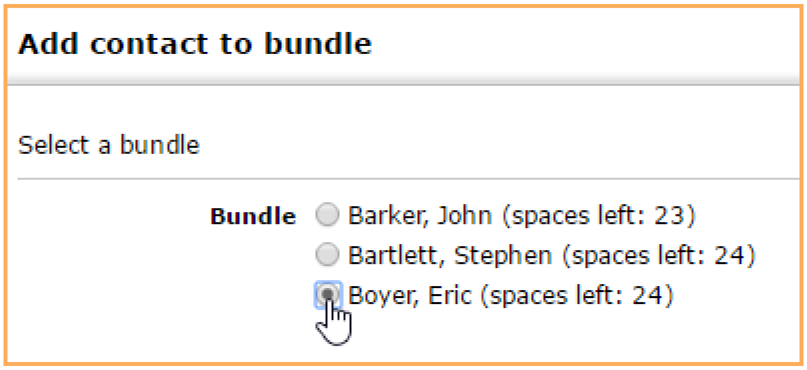
Hide Member ID field from member profiles

Administrators can prevent the Member ID (aka User ID) from appearing on the member profile by checking the **For administrator access only** option for the User ID field on the Common fields screen.



Bundle admins in alphabetical order when adding to bundle

When an administrator adds a contact to a membership bundle, the list of bundle administrators is now sorted alphabetically by last name.



Bug fixes

A number of bugs have been fixed, including but not limited to, the following:

- Site pages missing after switching themes
- Unable to change slideshow links
- Transparent background ignored for PNG files
- Theme overrides not being applied to .less files
- Restricted website editor unable to add page
- Administrator limit not increased after changing billing plan
- Scrolling position lost after viewing image in site album
- Print button on email template screen prints an empty block
- Secondary menu color styles are being applied only to visited links on sites using Terra Oyster Cove

Update 5.11.3

5.11.3 – Released on July 24, 2017

Version 5.11.3 is an interim update to Release 5.11 of Wild Apricot. This update includes the following bug fixes.

Restricting access to files

You can now restrict access to individual files on your Wild Apricot site by membership levels and member groups. That way, only those who belong to the membership levels or member groups you choose can view a particular image or access a particular document.

You can restrict access from the Files screen and from the Insert dialog when adding a picture or document.

For more information, see Restricting access to files.

Bug fixes

The following issues have been fixed:

- Exporting of event attendees times out before completing
- Resending failed messages from email log sends to all recipients
- Event announcement on Building Blocks theme displays white text on white background

- Robot Slab and Lato fonts not displayed correctly on Showcase themes
- Internal notes entered by administrators on invoices being overwritten by system-generated notes
- Rebuilding custom theme generates "Theme with id '##' not found." errors
- Clicking on blog post's author results in page not found or resource not found errors
- Import hangs if the administrator switches tabs in Chrome

Release 5.9

5.9 – Released on December 6, 2016

The Version 5.9 release of Wild Apricot consists of the following changes and enhancements.

- Post-release updates (latest: January 16, 2017)
- New feature: Voiding invoices
- Slideshow gadget enhancements
- Email improvements
- New background image options
- New website theme: Building Blocks
- Checking in guests
- New and enhanced API calls
- Support for Square
- Bug fixes

SHOW ME (4:00)

Post-release updates (latest: January 16, 2017)

The following updates to Version 5.9 have been released.

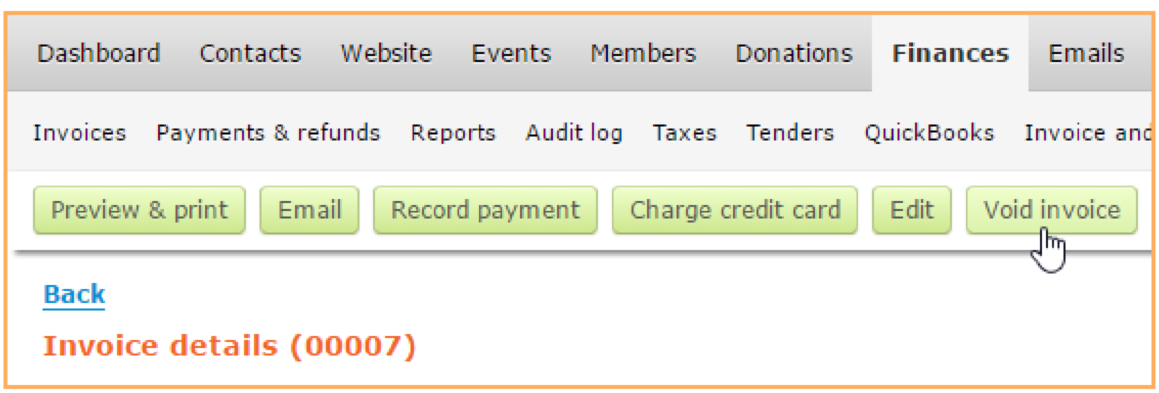
- 5.9.2 – bug fixes
- 5.9.1 – bug fixes

New feature: Voiding invoices

Previously, if you wanted to cancel an invoice, you would delete it. However, deleting invoices led to many accounting issues, including incorrect balances and gaps in invoice numbers.

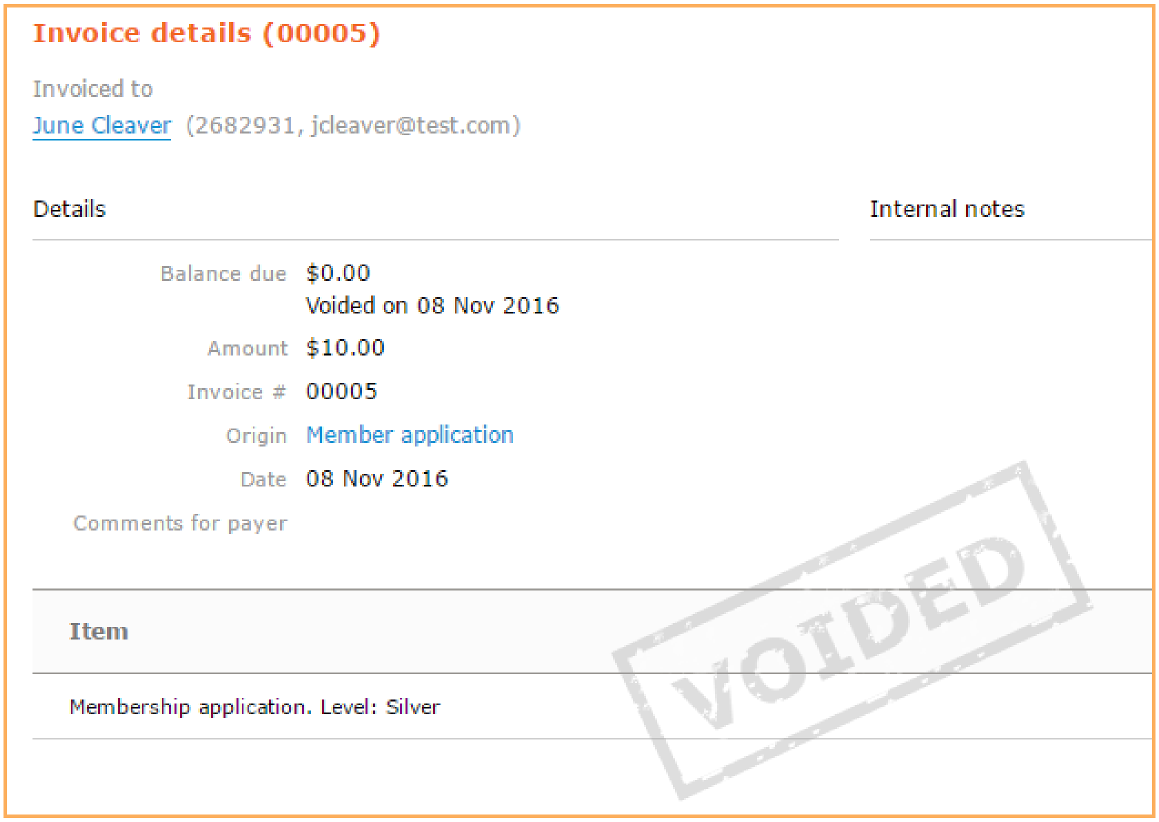
Now, you can void an invoice instead of deleting it. Voiding an invoice cancels the invoice without deleting it, thereby preserving historical information for any future audits.

To void an invoice, you display the invoice details then click the **Void invoice** button.



You will be prompted to confirm the operation, which cannot be undone. Once you confirm the operation, any settled payments will be removed from the invoice, and corresponding payment will be unsettled. Any event registration or membership application associated with the invoice will not be deleted, but will now appear as unpaid. Notes will be added in both cases indicating that the invoice was voided.

On the invoice, the invoice amount will not be changed but the invoice balance will be set to zero. The voided invoice will have a status of voided and will appear marked with a VOIDED stamp.



Voided invoices are not included in financial reports. A record of how and when an invoice was voided will appear in the audit log.

After an invoice is voided, it can be deleted. To delete a voided invoice, display the invoice details and click the **Delete invoice** button.

In some cases, the system can automatically void or delete an invoice in response to a registration being cancelled or deleted, or a contact being deleted.

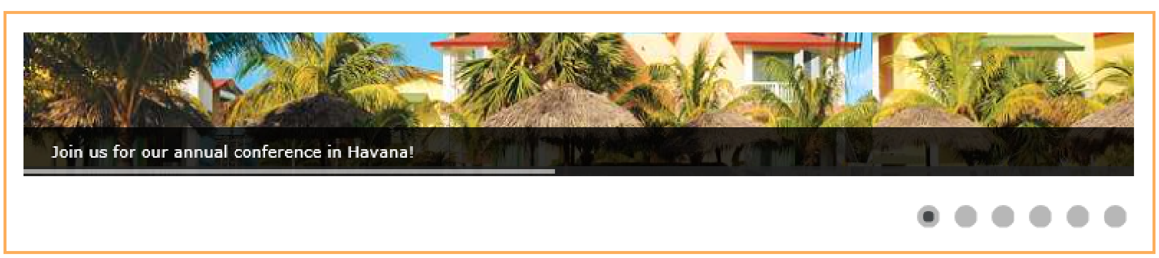
- If you cancel an event registration, the corresponding invoice will be automatically voided.
- If you delete an event or an event registration, the corresponding invoice(s) will be automatically deleted.
- if you delete a contact, all invoices assigned to the contact will be automatically deleted

Paid invoices are now marked with a PAID stamp to distinguish them from unpaid and voided invoices.

Slideshow gadget enhancements

The following enhancements have been made to the slideshow gadget.

- You can now link each image in your slideshow to a separate destination. To link your images, display the slideshow gadget settings and click the **Add link to images** button. On the dialog that appears, you can choose where each image should link to . You can link to an external website or email address, to a page on your site, or to an event on your site. For each image, you can also specify a tooltip and choose whether you want the linked page to open in a new window or the same window. You can also specify a description which will appear along the bottom of the image. If you are displaying images from a photo album, any captions already assigned to the images will be automatically loaded as default descriptions.
- You can now display a caption along the bottom of each image within your slideshow.



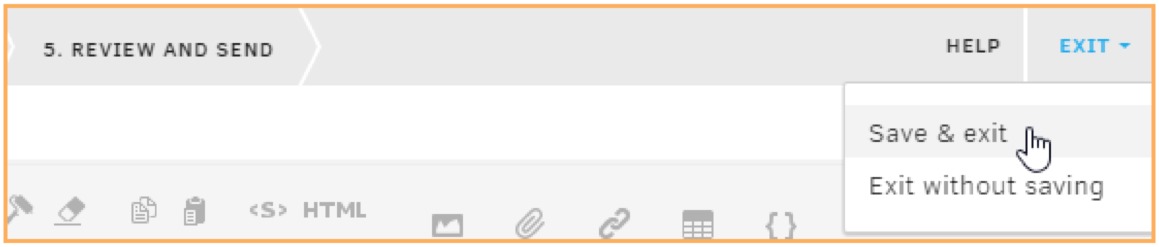
  There are two ways you can add captions to images: 1) If you are displaying images from a photo album, any captions already assigned to the images will be automatically displayed along the bottom. 2) While linking your slideshow images, you can enter a **Description** for each image. If you are displaying images from a photo album, captions will be automatically loaded as default descriptions.
- An option has been added to randomize the order in which slideshow images are displayed.
- An option has been added to remove the countdown bar that indicates how much longer each image will be displayed.

Email improvements

A number of improvements have been made to the email module.

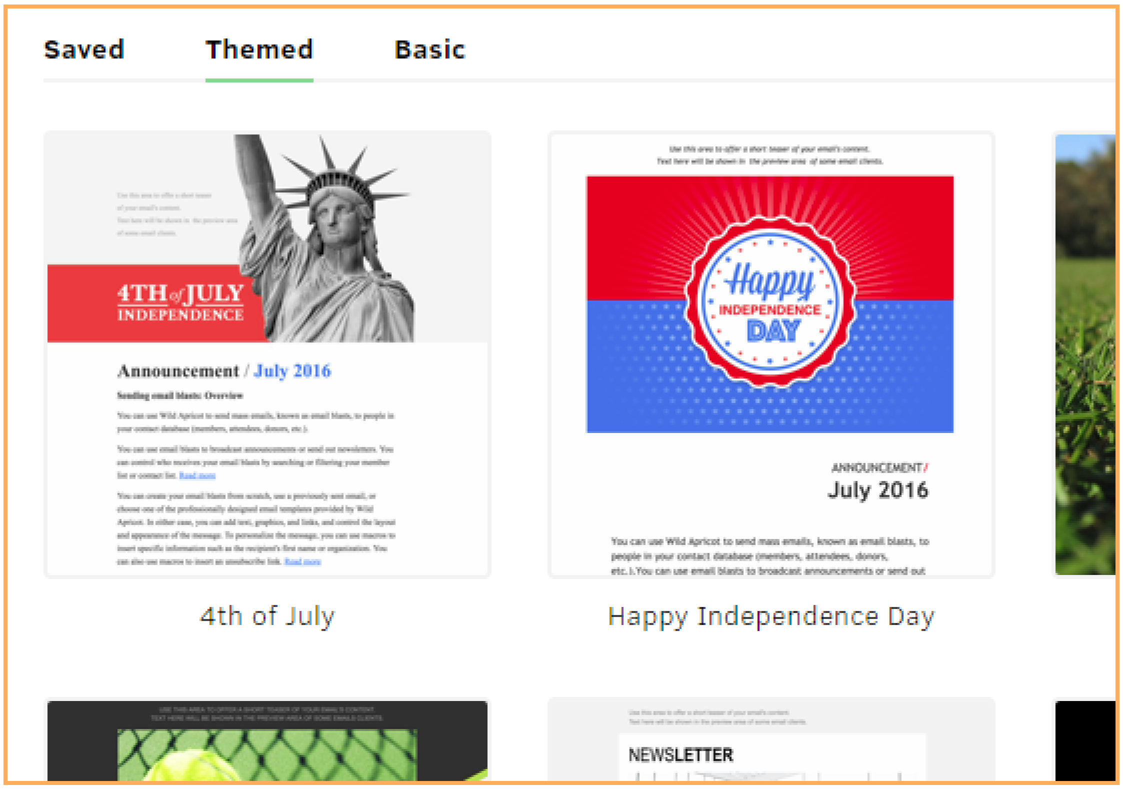
Email wizard

The options for exiting the email wizard are now available from an **EXIT** menu instead of a **X** button.

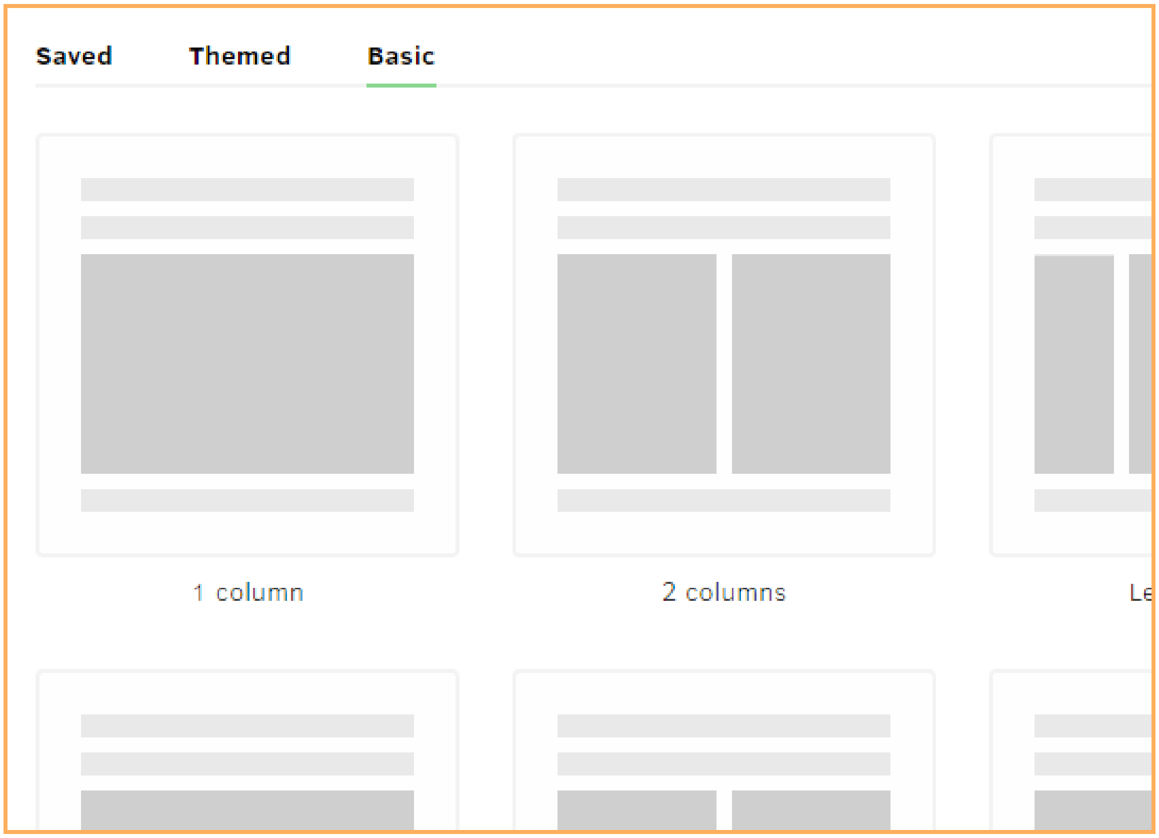


Email templates

Within the email wizard, email templates are now grouped onto different tabs by type. Custom templates that you have created or copied are displayed on the **Saved** tab. On the **Themed** tab are professionally designed templates in a variety of colors and styles, with sample content and graphics.



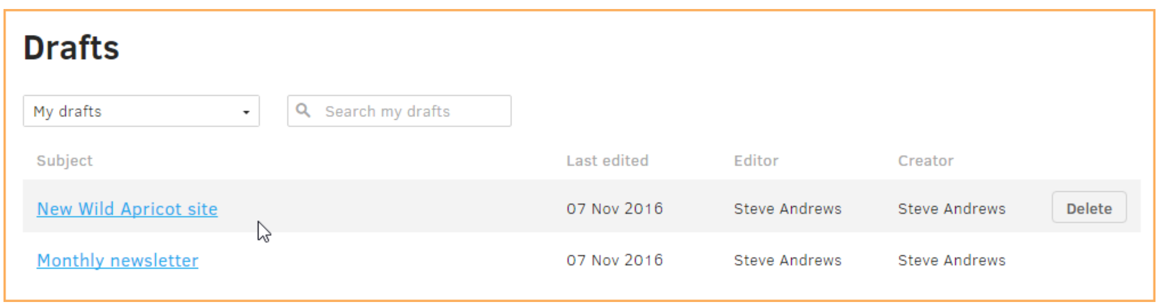
On the **Basic** tab are simple templates in a variety of layouts, without any sample content or graphics.



The older *deprecated* templates that do not provide the consistency and stability of the newer templates are no longer available for new emails.

Email drafts

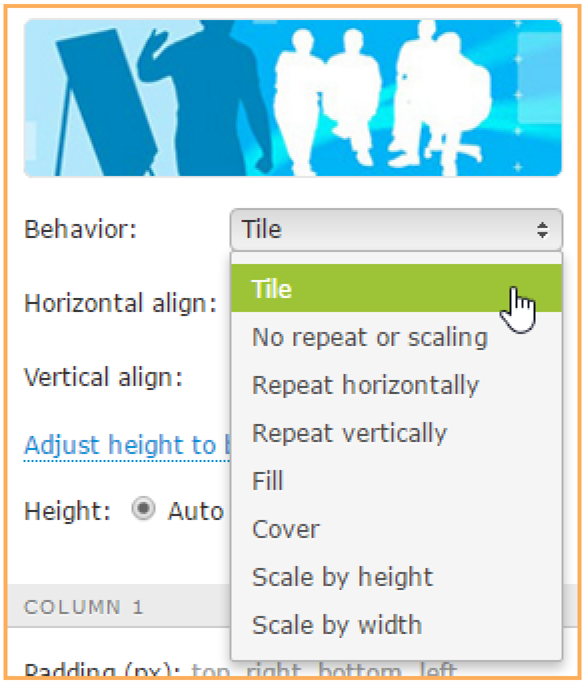
The Email drafts screen has been redesigned.



The **Delete** button now only appears when you hover over a row. To open a draft of editing, you click the Subject link for that draft.

New background image options

After assigning a background image to a content gadget, layout, page template, or placeholder, you can now exercise more control over how the image appears within the available space. In addition to the options available in the existing **Repeat image** dropdown – **Tile**, **Repeat horizontally** , **Repeat vertically**, **No repeat** – the new **Behavior** dropdown also provides **Fill**, **Cover**, **Scale by height**, and **Scale by width** options.

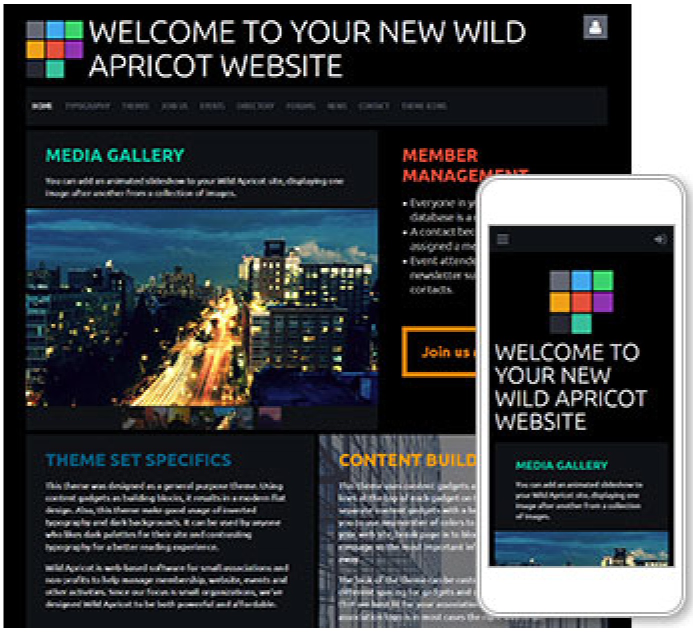


The new options behave as follows:

Option	Behavior
Fill	The image will be stretched to completely fill the available space, and may therefore appear distorted.
Cover	The image will be proportionally resized to cover the available space, and may therefore be cropped.
Scale by height	The image will be proportionally resized to fit the height of the available space. Depending on the dimensions of the space, the image may be cropped, or may not fill the entire width of the space.
Scale by width	The image will be proportionally resized to fit the width of the available space. Depending on the dimensions of the space, the image may be cropped, or may not fill the entire height of the space.

New website theme: Building Blocks

A new fully-responsive Building Blocks theme set has been added. This theme set is a variation on the Tinted Tiles theme set, with inverted typography and dark backgrounds.



For more information, see Tinted Tiles and Building Blocks theme sets.

Checking in guests

You can now check in a guest at an event without first checking in the main registrant

New and enhanced API calls

Wild Apricot's API has been significantly expanded, with a number of new calls, and enhancements to a number of existing calls.

New API calls

- AuditLogItems – retrieves a filtered list of audit log entries, and retrieves details for a particular audit log entry.
- EventRegistrationTypes – retrieves the details for an existing event registration type, and creates, updates, and deletes event registration types.
- Pictures – uploads pictures to your account and downloads pictures from picture fields

New remote procedure calls

- Voiding an invoice
- Generating an invoice for an event registration
- Generating an invoice for pending membership
- Approving a pending membership
- Rejecting a pending membership

Enhanced API calls

The following API calls have been enhanced.

- Contacts
    - Added ability to retrieve and update pictures in picture fields
- Events
    - Added ability to update event details
    - Added ability to create a new event
    - Added ability to delete an event
    - Added ability to retrieve information for specific events
- Invoices
    - Added ability to create an invoice
    - Added ability to edit an invoice
    - Added ability to delete an invoice

    - Added the following fields: CreatedDate, CreatedBy, UpdatedDate, UpdatedBy
- Refunds
    - Added ability to create a refund
    - Added ability to edit a refund
    - Added ability to delete a refund
    - Added the following fields: CreatedDate, CreatedBy, UpdatedDate, UpdatedBy
- Payments
    - Added ability to edit a payment
    - Added the following fields: CreatedDate, CreatedBy, UpdatedDate, UpdatedBy

Support for Square

Support has been added for Square, a mobile credit card processor. For more information, see Accepting mobile payments using Square.

Bug fixes

A number of bugs have been fixed, including but not limited to, the following:

Emails

- Unable to exit email wizard after sending test message
- Error when sending emails or opening email draft
- Email templates not applied leading to inconsistent results
- Email link changed when saving changes
- Email images displayed at full size on some email clients
- Last change author not being updated for email drafts
- Renewal notices and renewal grace period emails not being sent
- Invoice email sent multiple times to a particular member

Events

- Disabled events no longer displayed in red on events list
- Event registrants list showing wrong membership renewal due date
- Event calendar not scaling when placed in a 2-column layout
- Unable to edit event reminders because of internal error
- Event registration message not duplicated along with rest of event
- Link button styles not appearing in event announcement
- System hangs after clicking Export to PDF button within event registrants list

Payments

- Renewal payment recorded and email sent, but contact record not updated
- ALT tags missing for credit card graphics on payment screen
- Card holder name field in Stripe displays card type

Exporting

- Payments export using wrong date format
- QuickBooks export file includes transactions not within the specified date range
- Wrong donation dates in export file

Other

- Renewal date in admin view using wrong date format
- Problem with updating passwords via import
- Adding a member with existing email generates internal error
- Scroll bar missing from Insert macro window
- Layout issues on Manage group participants screen
- Featured member gadget not displaying member image
- Background image scrolls when applied to Skyline theme through Colors and style screen
- Member directory not displayed properly on mobile devices
- Field values in membership directory not using full column width

- Advanced contact search using Earliest donation date and Latest donation date produces inaccurate results
- Photo album privacy settings being ignored

Mobile app release history

Mobile app release history

We've published **12 updates to our mobile app**, and 71 updates to the browser version of Wild Apricot. For future plans and current development status, see Product roadmap. For mobile app user guide and download details, see Wild Apricot mobile app.

Mobile 2.1

Mobile 2.1 – August 17, 2017 (both iOS and Android)

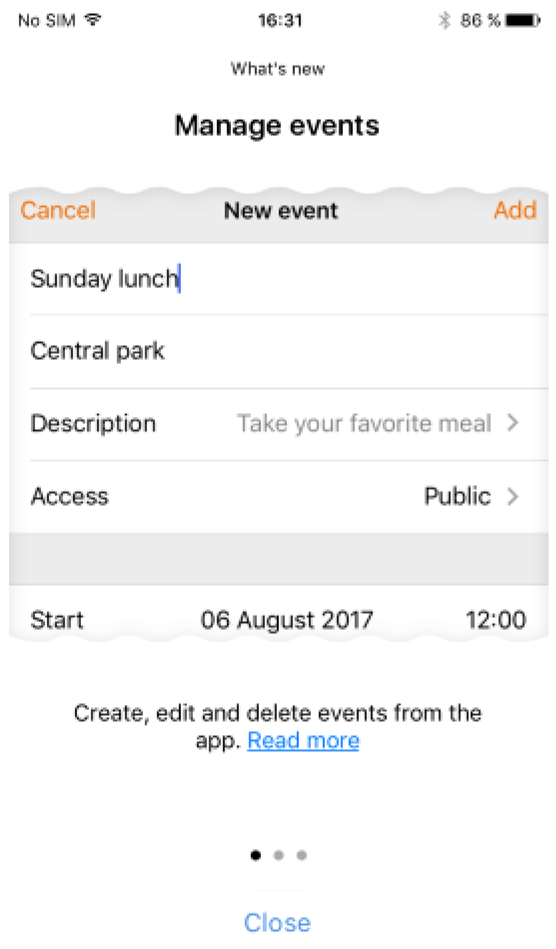
Both the iOS and Android versions of the application were updated. A number of bug fixes were made.

Mobile 2.0

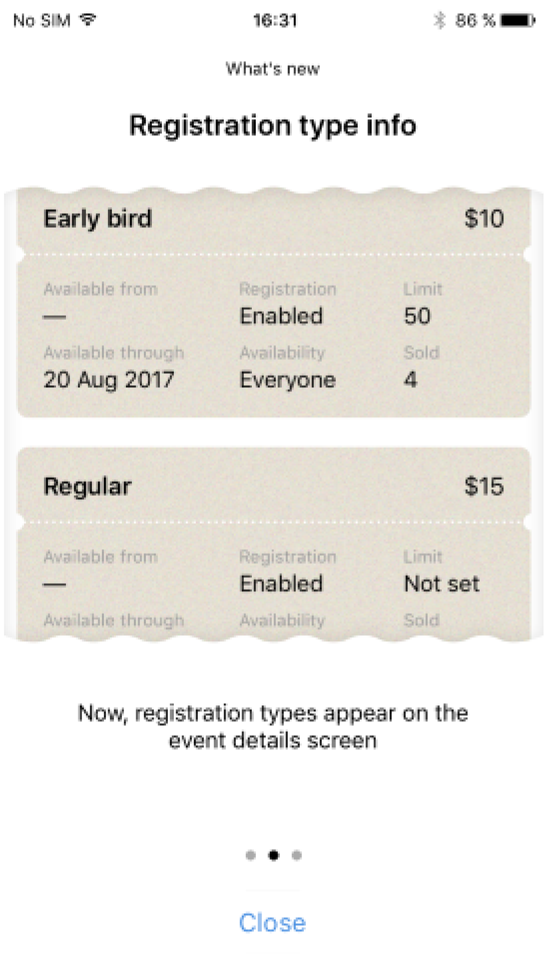
Mobile 2.0 – July 24, 2017 (both iOS and Android)

Both the iOS and Android versions of the application were updated. The following enhancements were made:

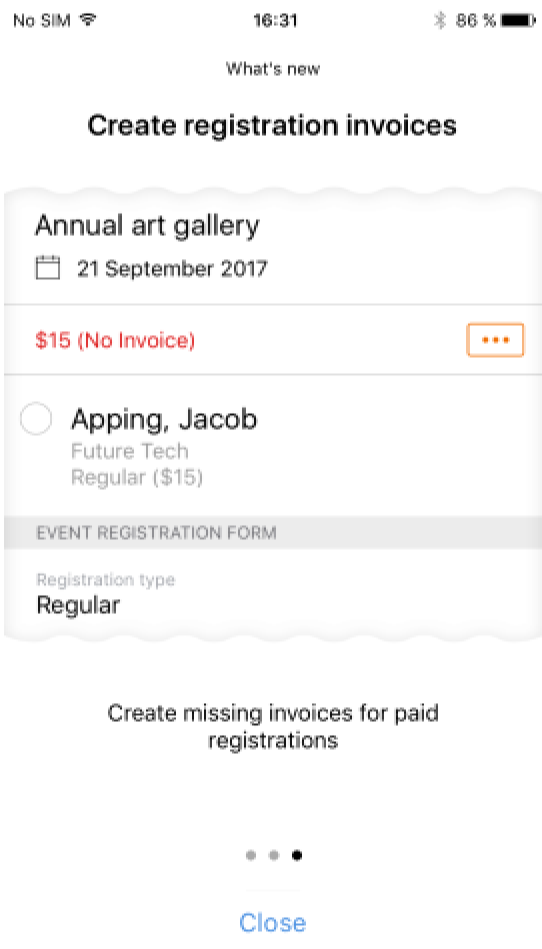
- You can now create, edit, and delete events from the app



- Registration types now appear on the event details screen



- For event registrations without invoices, you can now create missing invoices for paid registrations



- Various bug fixes

Mobile 1.8

Mobile 1.8 – Released on May 25, 2017 (both iOS and Android)

Both the iOS and Android versions of the application were updated. The following enhancements were made:

- (*iOS only*) Support for accepting credit card payments directly from your mobile device using PayPal Here
- Various bug fixes

Product roadmap

Product roadmap

So far, we have released 71 updates of browser application and 12 updates of mobile app, see Release history. We keep improving our applications.

Work in progress

To see what our development team is busy with, use the button below. It will show your ideas on our Wishlist forum that we're working on right now:

Wishlist forum - Work in progress

Please keep in mind that we do not promise release dates and we may remove any feature from the work scope any time.

Have something to share with us?

We use Wishlist as our main source for planning product changes. The more voices has a particular idea, the more important it is for us to consider in future releases. Still, we do not solely rely on number of votes, there are a number of internal factors we consider when planning product releases.

Wishlist forum - share your ideas

Our team reviews all of them and comments when we we have updates or questions.

Suggesting new features

Suggesting new features

We collect feedback from all our users (e.g. membership managers, event organizers, treasurers, volunteers, theme designers, partners, etc) via our community forums. We collect both specific feedback on features we're currently working on, as well as suggestions for features we should add to our roadmap. You can make suggestions directly in the forums, or by clicking the **Feedback** icon within admin view in your Wild Apricot account.

Our forums

Wild Apricot maintains the following community forums:

- **Wishlist** - where we collect feedback on current roadmap items as well as other suggestions
- **Designers** - discussion related to themes development
- **Developers** - mostly API related

Although all our forums are important to us, our key forums is our Wishlist, where we engage with current and future users to collect their feedback on our plans for Wild Apricot.

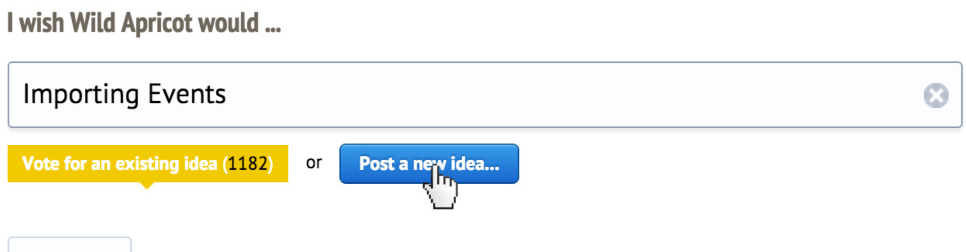
Using the Wishlist forum

Adding a new suggestion/finding existing suggestions

With hundreds of active feature suggestions, there is a good chance that your idea is already in our Wishlist. Which is why, you'll see a list of suggested ideas automatically appear as you type you idea (e.g. see "Importing events" sample below)

If your idea in the list, click on the **Vote** button to add your votes to the suggestion to increase priority of the suggestion, or click on the idea to contribute any additional comments and then add your votes

If you don't see your idea in the list, click on the **Post a new idea** button and fill out the the details of your suggestion (e.g. category, description, images) and add your votes if you would like to assign them to this feature



Voting limits and notifications

Every user can vote once on any feature within the wishlist. And votes can be added, removed, or moved to another suggestion at any time. Once a feature is released, all the users who voted for that feature will receive a notification on the suggestions change of status (e.g. developing -> released).

Understanding and following an idea's progress

We review every suggestion that is posted to the Wishlist. If the idea has already been suggested, it will be merged with an existing idea (including votes, comments and supporters). If it has not be suggested it will be assigned to one the following statuses:

- **collecting comments** - initial status of ideas being reviewed by our team and other forum users
- **developing** - the feature is being developed now
- **released** - feature is developed and published as a part of one of our releases
- **rejected** - used when a suggestion is rejected and we have no plans to work on it

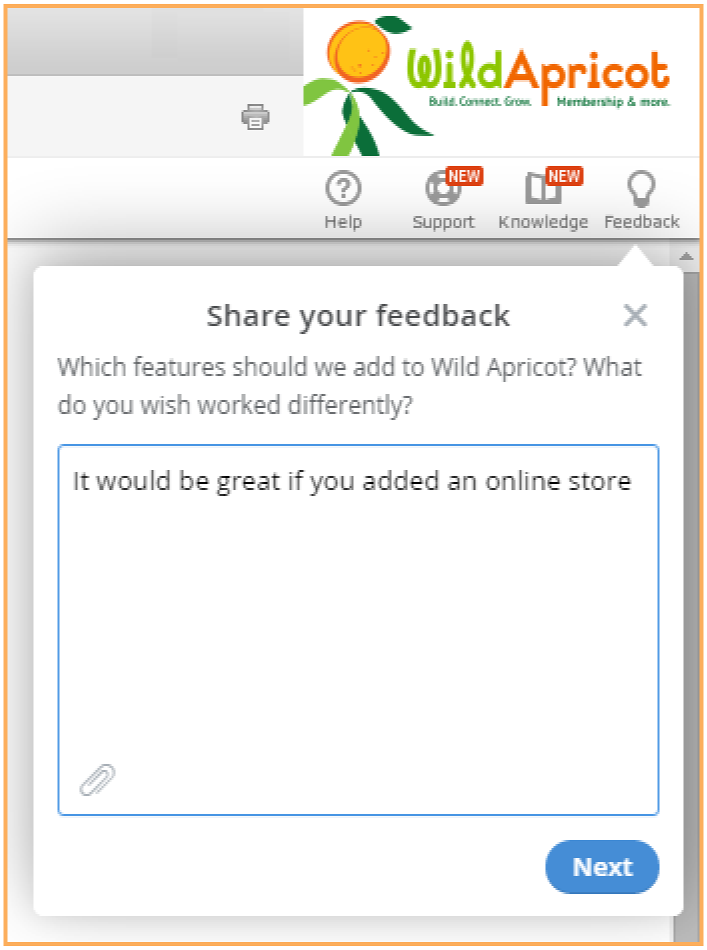
Notifications

When an idea changes its status, all the users who follow, voted or commented on the suggestion will be notified. Wild Apricot team makes updates to ideas when we have new information to share, or questions to clarify. For example, when a particular feature is released, we will change its status to Released, add some notes to it and all user who voted for it will receive email notification.

Using the Feedback feature in admin view

Ideas published via Feedback icon are going into public Wishlist forum. This is just another way of doing it.

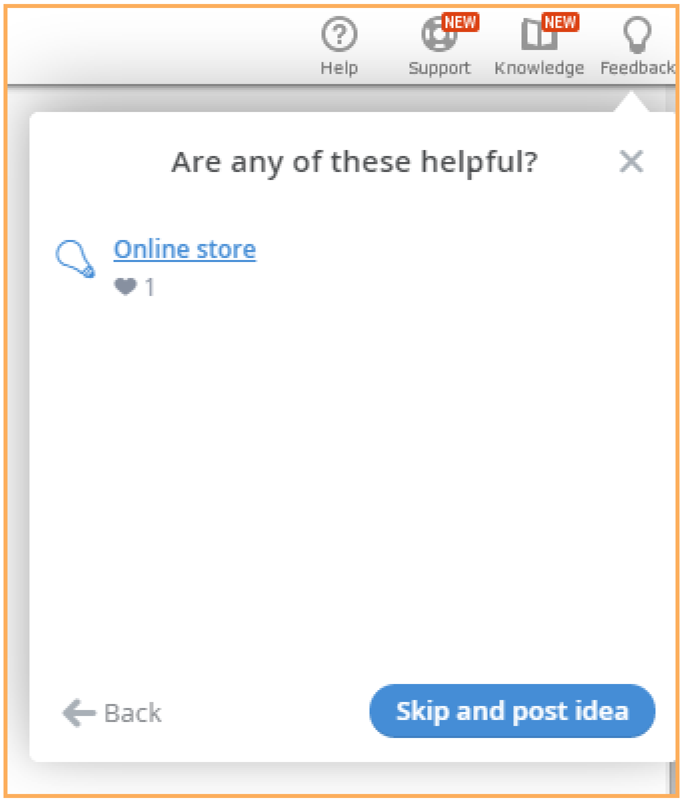
To provide feedback and suggest new features from within admin view, click the **Feedback** icon within the admin logo area in the upper right corner. A window will appear in which you can enter a comment or suggestion for improving Wild Apricot.



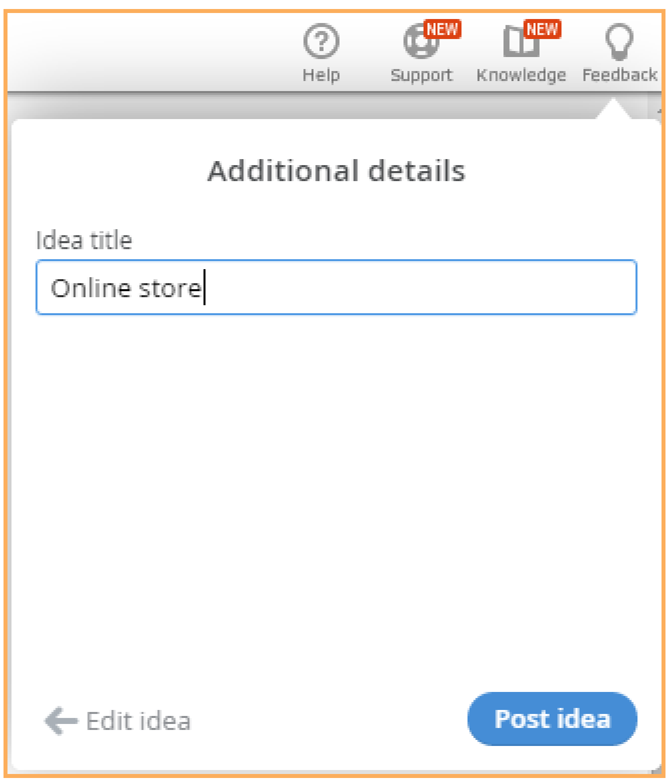
In addition to text, you can click the paper clip icon to add a file that further illustrates or explains your idea.

When you are finished describing your idea, click the **Next** button to continue.

If a similar idea has already been suggested, you'll have the option of clicking the link to the existing idea and adding your vote to it, or continuing with posting your idea.

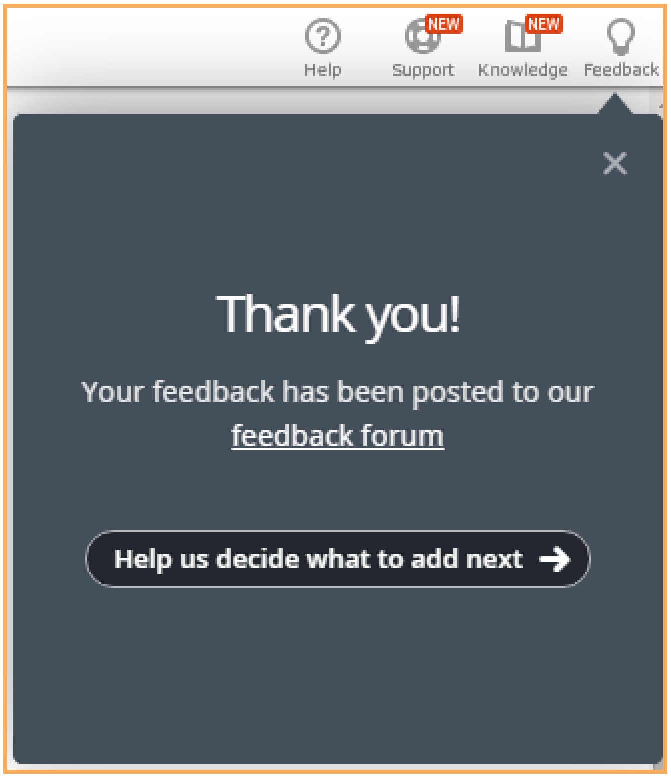


Unless you chose to add your vote to an existing idea, you will be asked to enter a title for your idea.

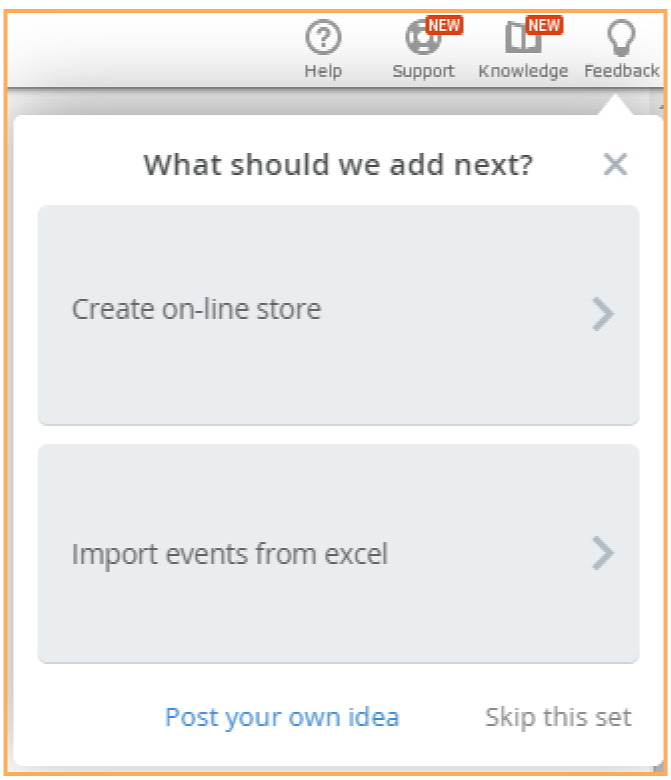


Once you click **Post idea**, your feedback will be posted to the Wild Apricot wishlist forum where it will be reviewed by Wild Apricot's design team.

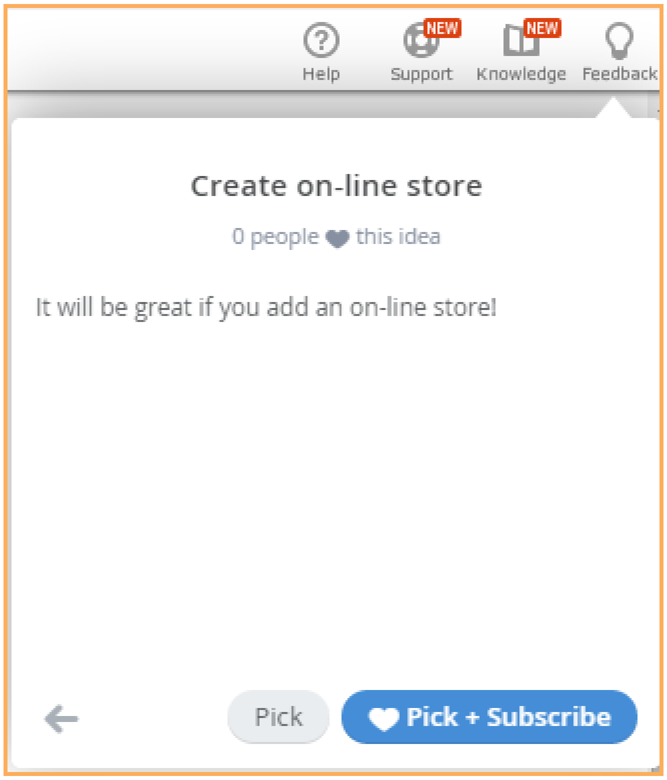
If you want to help Wild Apricot prioritize the various feature suggestions, you can click **Help us decide what to add next**.



You'll be asked to pick between two ideas, or else you can skip that set and view another set.



After choosing between two ideas, click **Pick** to confirm your choice. You also have the option of clicking **Pick + Subscribe** to choose the idea and subscribe to updates regarding the idea you have chosen.



When you are finished providing feedback, click the **X** in the upper right corner to close the feedback window.

Product roadmap and votes

We use votes from our clients to directly inform our product roadmap decisions. Usually, our product plans will closely align with the collective priority set by our users' votes; however, we also have internal processes to determine which features are added to a specific release – some features require specific skills and developers may be already busy with other work, or it's more efficient for us to do several closely related features in one release to reduce overall development costs.

The results of planning is added to our Roadmap page. We also update status of specific wishlist ideas, so if you have voted on an item or commented, you will be notified about updates automatically.

On this page:

See also:

- Wishlist forum
- Product roadmap
- Release history
- Navigating Wild Apricot

Customizing forums using CSS

Redirection Notice
This page will redirect to Customizing forums using CSS and JavaScript.

Anti-spam settings (Captcha)

Redirection Notice
This page will redirect to Captcha anti-spam settings.

Wild Apricot API

Redirection Notice
This page will redirect to Wild Apricot admin API.

Pricing changes

Redirection Notice
This page will redirect to Home.

Requesting a Wild Apricot payment invoice or receipt

Redirection Notice
This page will redirect to Requesting a Wild Apricot payment receipt.

Customizing default membership emails

Redirection Notice
This page will redirect to Membership emails.

Events database

Redirection Notice
This page will redirect to Events list.

Color and style settings for Tinted Tiles themes

Redirection Notice
This page will redirect to Color and style settings for Tinted Tiles and Building Blocks themes.

Tinted Tiles theme sets

Redirection Notice
This page will redirect to Tinted Tiles and Building Blocks theme sets.

Adjusting or canceling an invoice

Redirection Notice
This page will redirect to Adjusting, voiding, and deleting invoices.

Embedding Instagram photos

Redirection Notice
This page will redirect to Embedding external photo galleries.

API V2 authentication

Redirection Notice
This page will redirect to Authenticating API access from a 3rd-party server or application.

Referral transaction log

Redirection Notice
This page will redirect to Referrals.

Adding a new contact

Redirection Notice
This page will redirect to Adding members and other contacts.

Getting started guides

Redirection Notice
This page will redirect to Getting started with Wild Apricot.

Contact database

Redirection Notice
This page will redirect to Contact list.

Getting started with events

Redirection Notice
This page will redirect to Events.

Financial management overview

Redirection Notice
This page will redirect to Financial management.

Customizing theme backgrounds

Redirection Notice
This page will redirect to Setting the site background.

Custom reports layouts

Redirection Notice
This page will redirect to Advanced member search layouts.

Member applications workflow

Redirection Notice
This page will redirect to Membership application form.

Discount coupons for membership applications

Redirection Notice
This page will redirect to Discounts and complimentary transactions.

Page footer customization

Redirection Notice
This page will redirect to Page headers and footers.

Basic Visual Setup Wizard

Redirection Notice
This page will redirect to Designing site pages.

Title customization

Redirection Notice
This page will redirect to Designing site pages.

Logo customization

Redirection Notice
This page will redirect to Designing site pages.

Page header customization

Redirection Notice
This page will redirect to Page headers and footers.

Page management

Redirection Notice
This page will redirect to Managing site pages.

How to add web pages

Redirection Notice
This page will redirect to Managing site pages.

Editing web pages

Redirection Notice
This page will redirect to Designing site pages.

Managing files using WebDAV

Redirection Notice
This page will redirect to Uploading files in bulk using WebDAV.

Content pages vs. functional pages

Redirection Notice
This page will redirect to Designing site pages.

Functional pages

Redirection Notice
This page will redirect to Designing site pages.

Custom forms

Redirection Notice
This page will redirect to Inserting custom forms.

Inserting gadgets

Redirection Notice
This page will redirect to Gadgets.

Copying and pasting text

Redirection Notice
This page will redirect to Using the content editor.

HTML for Page Layouts

Redirection Notice
This page will redirect to Layouts.

Restoring the previous version of a page

Redirection Notice
This page will redirect to Restoring pages and page templates.

Paragraph breaks, line breaks, and line spacing

Redirection Notice
This page will redirect to Adding and formatting text.

Site settings

Redirection Notice
This page will redirect to Settings.

Adding custom online forms via Wufoo

Redirection Notice
This page will redirect to Inserting custom forms.

Polls and surveys

Redirection Notice
This page will redirect to Inserting custom forms.

Adding Facebook and other social media widgets

Redirection Notice
This page will redirect to Social gadgets.

Identifying the page ID

Redirection Notice
This page will redirect to Finding the page ID.

Hiding the RSS icon

Redirection Notice
This page will redirect to Blog gadget.

Adding content under the login boxes

Redirection Notice
This page will redirect to Log in form gadget.

Enabling login boxes in Business Casual themes

Redirection Notice
This page will redirect to Log in form gadget.

Customizing the login area

Redirection Notice
This page will redirect to Log in form gadget.

Advanced customization examples

Redirection Notice
This page will redirect to Customization examples.

Fundraising and donations

Redirection Notice
This page will redirect to Managing donations.

Google Wallet

Redirection Notice

This page will redirect to Online payments.

Adding event attendees manually

Redirection Notice
This page will redirect to Adding event registrants manually.

A list of macros

Redirection Notice
This page will redirect to Using macros in emails.

Version 5 preview

Redirection Notice
This page will redirect to Release history.

View and edit contact details

Redirection Notice
This page will redirect to Viewing and editing contact details.

Photos - Contact Card

Redirection Notice
This page will redirect to Member photo album settings.

Privacy settings

Redirection Notice
This page will redirect to Member privacy settings.

View and edit memberships

Redirection Notice
This page will redirect to Viewing and editing membership details.

Import Guide

Redirection Notice
This page will redirect to Importing members and other contacts.

Import History

Redirection Notice
This page will redirect to Importing members and other contacts.

Spreadsheet Format

Redirection Notice
This page will redirect to Importing members and other contacts.

Delete contact records

Redirection Notice
This page will redirect to Deleting and archiving member and contact records.

Default membership emails

Redirection Notice
This page will redirect to Customizing default membership emails.

Discount coupons for member applications

Redirection Notice
This page will redirect to Discount coupons for membership applications.

Upload and manage member photo albums

Redirection Notice
This page will redirect to member photo albums.

Viewing member photo albums

Redirection Notice
This page will redirect to member photo albums.

Configuring member photo albums

Redirection Notice
This page will redirect to member photo albums.

Photo album page

Redirection Notice
This page will redirect to photo album pages.

Quickbooks

Redirection Notice
This page will redirect to Exporting to QuickBooks.

QuickBooks Export Settings

Redirection Notice
This page will redirect to Exporting to QuickBooks.

Adjust or cancel payment or refund

Redirection Notice
This page will redirect to Adjusting or canceling a payment or refund.

Invoices - Overview

Redirection Notice
This page will redirect to Invoices.

Settings and customization of invoices and receipts

Redirection Notice
This page will redirect to Customizing invoices and receipts.

Reconciling transactions and invoices

Redirection Notice
This page will redirect to Invoices.

Managing receivables

Redirection Notice
This page will redirect to Financial management overview.

Adjust or cancel invoice

Redirection Notice
This page will redirect to Adjusting or canceling an invoice.

Find invoice

Redirection Notice
This page will redirect to Finding an invoice.

Resend or Print Invoices and Receipts

Redirection Notice
This page will redirect to Resending or printing invoices and receipts.

Issue manual invoice

Redirection Notice
This page will redirect to Issuing manual invoices.

Complimentary transactions and special discounts

Redirection Notice
This page will redirect to Discounts and complimentary transactions.

Event categories (tags, labels)

Redirection Notice
This page will redirect to event tags.

Backing up your site

Redirection Notice
This page will redirect to Backing up your data.

Deleting your account

Redirection Notice
This page will redirect to Cancelling your account.

Member Self-Service Video

Redirection Notice
This page will redirect to Video tutorials.

Supported Payment Systems Video

Redirection Notice
This page will redirect to Video tutorials.

Widgets Video

> **Redirection Notice**
> This page will redirect to Adding Wild Apricot functionality to other websites.

Prorating Membership Dues Video

> **Redirection Notice**
> This page will redirect to Video tutorials.

Customizing Member Application Form Video

> **Redirection Notice**
> This page will redirect to Video tutorials.

Member Communications Video

> **Redirection Notice**
> This page will redirect to Video tutorials.

Working With Contact Records Video

> **Redirection Notice**
> This page will redirect to Video tutorials.

Basic Webpage Editing Video

> **Redirection Notice**
> This page will redirect to Video tutorials.

Event Tagging Video

> **Redirection Notice**
> This page will redirect to Video tutorials.

Event Management Video

> **Redirection Notice**
> This page will redirect to Getting started with events.

Wild Apricot for professional and business associations

Redirection Notice
This page will redirect to Video tutorials.

Basic Visual Setup Wizard Video

Redirection Notice
This page will redirect to Video tutorials.

Advanced Setup Video

Redirection Notice
This page will redirect to Video tutorials.

Working with Photo Album Pages

Redirection Notice
This page will redirect to Video tutorials.

List Fields Video

Redirection Notice
This page will redirect to Video tutorials.

Restricted Access Sections Video

Redirection Notice
This page will redirect to Video tutorials.

Hidden Pages Video

Redirection Notice
This page will redirect to Page access and visibility.

Video Tutorial - Recording Payments and Settling To Invoices

Redirection Notice
This page will redirect to Recording payments and credits, and settling invoices.

Integrating Authorize.Net Video

Redirection Notice

This page will redirect to Video tutorials.

Integrating PayPal Standard Video

Redirection Notice
This page will redirect to Video tutorials.

Event registration workflow video

Redirection Notice
This page will redirect to Video tutorials.

Processing event registrations video

Redirection Notice
This page will redirect to Video tutorials.

Inserting Documents Video

Redirection Notice
This page will redirect to Video tutorials.

Custom Domain Name Setup Video

Redirection Notice
This page will redirect to Video tutorials.

File Management Video

Redirection Notice
This page will redirect to File management.

Contact Database Structure Overview Video

Redirection Notice
This page will redirect to Video tutorials.

Membership Application Form Video

Redirection Notice
This page will redirect to Video tutorials.

Creating An Event Video

Redirection Notice
This page will redirect to Video tutorials.

Event Registration Types Video

Redirection Notice
This page will redirect to Video tutorials.

Event Registration Form Video

Redirection Notice
This page will redirect to Video tutorials.

Inserting And Editing Tables Video

Redirection Notice
This page will redirect to Video tutorials.

Importing Contacts and Members

Redirection Notice
This page will redirect to Video tutorials.

Sending Manual E-mail Blasts

Redirection Notice
This page will redirect to Video tutorials.

Integrating PayPal Direct Payment Video

Redirection Notice
This page will redirect to Video tutorials.

Contact email settings and email log

Redirection Notice
This page will redirect to Contact email settings and log.

View email subscriptions for a contact

Redirection Notice
This page will redirect to Edit email subscriptions for a contact.

Edit email subscriptions for a contact

Redirection Notice
This page will redirect to Contact email settings and log.

Dynamic membership pricing fields

Redirection Notice
This page will redirect to Extra membership costs.

Invisible pages

Redirection Notice
This page will redirect to Video tutorials.

Working with WebDAV

Redirection Notice
This page will redirect to Uploading files in bulk using WebDAV.

Undo last webpage save

Redirection Notice
This page will redirect to Restoring the previous version of a page.

Line spacing in web pages

Redirection Notice
This page will redirect to Adding and formatting text.

PayPal Widget for Online Store

Redirection Notice
This page will redirect to Setting up an online store.

Adding Twitter Widget To Wild Apricot

Redirection Notice
This page will redirect to Adding Facebook and other social media widgets.

Donation Confirmation Email

Redirection Notice
This page will redirect to Donation forms.

Manually record a donation

Redirection Notice
This page will redirect to Managing donations.

Edit and delete a donation

Redirection Notice
This page will redirect to Managing donations.

Donations database

Redirection Notice
This page will redirect to Managing donations.

Troubleshooting Email Delivery Failures

Redirection Notice
This page will redirect to Managing undeliverable emails.

For new users

Redirection Notice
This page will redirect to Getting started with Wild Apricot.

Bundles Video

Redirection Notice
This page will redirect to Video tutorials.

Working with Forum Pages

Redirection Notice
This page will redirect to Video tutorials.

Member Directory Page Troubleshooting Video

Redirection Notice
This page will redirect to Video tutorials.

Website Pages with Restricted Access Video

Redirection Notice
This page will redirect to Video tutorials.

Functionality by module

Redirection Notice
This page will redirect to Home.

Event registration details

Redirection Notice
This page will redirect to Viewing event registration information.

Setting up your database

Redirection Notice
This page will redirect to Customizing database fields.

Customizing your member database

Redirection Notice
This page will redirect to Customizing database fields.

Customizing database fields by level

Redirection Notice
This page will redirect to Customizing database fields.

Field for contractual terms

Redirection Notice
This page will redirect to Customizing database fields.

Working with List Fields

Redirection Notice
This page will redirect to Customizing database fields.

Customizing your contact database fields

Redirection Notice

This page will redirect to Customizing database fields.

Internal use fields

Redirection Notice
This page will redirect to Customizing database fields.

Bundles - Member View

Redirection Notice
This page will redirect to Membership bundles.

Bundles - Site Administrator View

Redirection Notice
This page will redirect to Membership bundles.

Membership management

Redirection Notice
This page will redirect to Member and contact management.

Authorization required message

Redirection Notice
This page will redirect to Page access and visibility.

Website Pages with Restricted Access

Redirection Notice
This page will redirect to Page access and visibility.

Page visibility

Redirection Notice
This page will redirect to Page access and visibility.

Individual Forum page

Redirection Notice
This page will redirect to Forum pages.

Forum subscriptions by email

Redirection Notice
This page will redirect to Forum pages.

Forum summary page

Redirection Notice
This page will redirect to Forum pages.

Customization of functional pages

Redirection Notice
This page will redirect to Functional pages.

Uploading and Playing A Video File

Redirection Notice
This page will redirect to Adding video clips.

Online donation form

Redirection Notice
This page will redirect to Donation forms.

Requesting PayPal API Signature

Redirection Notice
This page will redirect to PayPal Direct Payment.

Event registration report

Redirection Notice
This page will redirect to Viewing event registration information.

Event payments report by registration type

Redirection Notice
This page will redirect to Viewing event registration information.

Viewing and contacting event attendees

Redirection Notice
This page will redirect to Viewing event registration information.

Organization Timezone

Redirection Notice
This page will redirect to Organization details.

Upgrading to a paid billing plan

Redirection Notice
This page will redirect to Changing your billing plan.

Change account billing plan exceptions

Redirection Notice
This page will redirect to Changing your billing plan.

Trial site and Free Billing plan

Redirection Notice
This page will redirect to Changing your billing plan.

Getting Fancy with Modal Login Boxes and Subscription Forms

Redirection Notice
This page will redirect to Theme overrides.

Template Engine Reference Guide

Redirection Notice
This page will redirect to Theme overrides.

Quick customization examples

Redirection Notice
This page will redirect to Page footer customization.

White-labeled version of Wild Apricot

Redirection Notice
This page will redirect to Replacing the admin logo.

Online Payments-Redirects

Authorize.Net Payments

Redirection Notice
This page will redirect to Authorize.net.

Google Checkout Integration Settings

Redirection Notice
This page will redirect to Google Checkout.

Google Checkout Payments

Redirection Notice
This page will redirect to Google Checkout User Payment Process.

Payment settings

Redirection Notice
This page will redirect to Online Payments.

PayPal account setup options

Redirection Notice
This page will redirect to PayPal account setup.

PayPal Fraud Tools

Redirection Notice
This page will redirect to PayPal Standard Fraud Tools.

PayPal Pro Payments

Redirection Notice
This page will redirect to PayPal Pro User Payment Process.

PayPal Standard Payments

Redirection Notice
This page will redirect to PayPal Standard User Payment Process.

Redirects for version 4.0

Customize donation email receipt

Redirection Notice
This page will redirect to Settings and customization of invoices and receipts.

Donors list

Redirection Notice
This page will redirect to Donations database.

Handling Pending Payments

Redirection Notice
This page will redirect to Payments - Overview.

Inserting PayPal buttons

Redirection Notice
This page will redirect to Adding PayPal buttons.

Invoice and receipt settings

Redirection Notice
This page will redirect to Settings and customization of invoices and receipts.

Payments report

Redirection Notice
This page will redirect to Financial Reports.

Payment workflow and payment transactions list

Redirection Notice
This page will redirect to Financial Management Overview.

Transaction list - New member applications

Redirection Notice
This page will redirect to Invoices - Overview.

Transaction list - other transactions

Redirection Notice
This page will redirect to Invoices - Overview.

Payment workflow essentials

Redirection Notice
This page will redirect to Financial Management Overview.

Recording payments - other transactions

Redirection Notice
This page will redirect to Record Payment and Settle to Invoice.

View or re-send invoice or receipt

Redirection Notice
This page will redirect to Resend or Print Invoices and Receipts.

Multiple registrations for an event

Redirection Notice
This page will redirect to Setting up events.

5. CSS Customization

Redirection Notice
This page will redirect to CSS Customization.

Member levels

Redirection Notice
This page will redirect to Membership levels.

0. Release history

Redirection Notice
This page will redirect to Release history.

Redirects for version 4.2

Tracking link click-throughs

Redirection Notice
This page will redirect to Tracking emails.

Tracking opened emails

Redirection Notice
This page will redirect to Tracking Emails.

Sending e-mail blasts

Redirection Notice
This page will redirect to Sending email blasts.

Web browser requirements

Redirection Notice
This page will redirect to Browser compatibility.

E-mail Subscription Form

Redirection Notice
This page will redirect to Email Subscription Form.

Member ID

Redirection Notice
This page will redirect to User ID.

Adding member records

Redirection Notice
This page will redirect to Adding a new contact.

Adding Facebook Plugins

Redirection Notice
This page will redirect to Adding Facebook and Other Social Media Widgets.

Setup Guide

Redirection Notice
This page will redirect to Getting Started Guides.

Redirects for version 4.4

Access control by member status

Redirection Notice
This page will redirect to How membership status affects available functionality.

Authorize.net Troubleshooting

Redirection Notice
This page will redirect to Authorize.net.

Authorize.net User Payment Process

Redirection Notice
This page will redirect to Authorize.net.

Completing pending event registrations

Redirection Notice
This page will redirect to View account history and pay invoices.

Custom currency setup

Redirection Notice
This page will redirect to Manual payments.

Customization tweaks examples

Redirection Notice
This page will redirect to Customization examples.

Default Event Emails

Redirection Notice
This page will redirect to Customizing event emails.

For Designers and Developers

Redirection Notice
This page will redirect to Advanced site customization.

Google Checkout

Redirection Notice
This page will redirect to Google Wallet.

Google Checkout account setup

Redirection Notice
This page will redirect to Google Wallet.

Google Checkout Troubleshooting

Redirection Notice
This page will redirect to Google Wallet.

Google Checkout User Payment Process

Redirection Notice
This page will redirect to Google Wallet.

Integrating with Authorize.net

Redirection Notice
This page will redirect to Authorize.net.

Integrating with Google Checkout

Redirection Notice
This page will redirect to Google Wallet.

Integrating with PayPal Pro

Redirection Notice
This page will redirect to PayPal Direct Payment.

Integrating with PayPal Standard

Redirection Notice
This page will redirect to PayPal Standard.

Payment configuration errors

Redirection Notice
This page will redirect to Online payments.

Payment instructions

Redirection Notice
This page will redirect to Payments - Overview.

PayPal Pro

Redirection Notice
This page will redirect to PayPal Direct Payment.

PayPal Pro Fraud Tools

Redirection Notice
This page will redirect to PayPal Direct Payment.

PayPal Pro Troubleshooting

Redirection Notice
This page will redirect to PayPal Direct Payment.

PayPal Pro User Payment Process

Redirection Notice
This page will redirect to PayPal Direct Payment.

PayPal Standard Fraud Tools

Redirection Notice
This page will redirect to PayPal Standard.

PayPal Standard Troubleshooting

Redirection Notice
This page will redirect to PayPal Standard.

PayPal Standard User Payment Process

Redirection Notice
This page will redirect to PayPal Standard.

Recurring payments with Authorize.net

Redirection Notice
This page will redirect to Recurring payments.

Recurring payments with PayPal Pro

Redirection Notice
This page will redirect to Recurring payments.

Recurring payments with PayPal Standard

Redirection Notice
This page will redirect to Recurring payments.

Tutorials

Redirection Notice
This page will redirect to Customization examples.

Log in to your account

Redirection Notice
This page will redirect to Logging into your account.

Dashboard Page Overview

Redirection Notice
This page will redirect to Using the Dashboard.

Administrative and member views

Redirection Notice
This page will redirect to Switching between admin and public views.

All settings

Redirection Notice
This page will redirect to Settings.

Contact Database and Membership Management

Redirection Notice
This page will redirect to Member and contact management.

Website and Content Management

Redirection Notice
This page will redirect to Site setup and customization.

Printing Web Pages

Redirection Notice
This page will redirect to Printing in Wild Apricot.

Event Calendar and Event Registration

Redirection Notice
This page will redirect to Events.

Page access

Redirection Notice
This page will redirect to Page access and visibility.

Adding an event into desktop calendar software

Redirection Notice
This page will redirect to Adding an event to calendar programs.

Adding embedded audio

Redirection Notice
This page will redirect to Embedding audio on your site.

Using Google Analytics with Wild Apricot

Redirection Notice
This page will redirect to Tracking website traffic.

Forum Module

Redirection Notice
This page will redirect to Forum pages.

Inserting favicon - favorites icon

Redirection Notice
This page will redirect to Inserting a favorites icon (aka favicon).

Help with customization and setup

Redirection Notice
This page will redirect to Customizing the appearance of your site.

Art text styles in themes

Redirection Notice
This page will redirect to Customizing ArtText styles in themes.

How themes interact with Colors and Styles customization

Redirection Notice
This page will redirect to Customizing Colors and Styles options for themes.

Blog module

Redirection Notice
This page will redirect to Blog pages.

RSS icon customization

Redirection Notice
This page will redirect to Hiding the RSS icon.

Scale widget pages to iframe

Redirection Notice
This page will redirect to Changing the widget width.

Identifying page ID

Redirection Notice
This page will redirect to Identifying the page ID.

Template Gadgets and Modules

Redirection Notice
This page will redirect to Customizing system gadgets.

Header backgrounds and Theme customization

Redirection Notice
This page will redirect to Customizing header background settings for themes.

Bundle Membership Level Overview

Redirection Notice
This page will redirect to Membership bundles.

Automating membership renewals

Redirection Notice
This page will redirect to Membership renewal policy.

Import of Bundles

Redirection Notice
This page will redirect to Importing bundles.

Cleaning up your webpage code after pasting from Microsoft Word

Redirection Notice
This page will redirect to Copying and pasting text.

List of event attendees

Redirection Notice
This page will redirect to Viewing attendees for all events.

Member picture

Redirection Notice
This page will redirect to Adding member or contact pictures.

Online member application form

Redirection Notice
This page will redirect to Membership application form.

Donation Form Customization

Redirection Notice
This page will redirect to Donation forms.

Adding content under menu

Redirection Notice
This page will redirect to Adding content under the login boxes.

Theme Overrides Tutorial - Adding Text and Links to Login Area

Redirection Notice
This page will redirect to Customizing the login area.

Page Model

Redirection Notice
This page will redirect to Page model properties.

CSS and LESS

Redirection Notice
This page will redirect to CSS, LESS, and JavaScript processing.

Hide Powered By branding

Redirection Notice
This page will redirect to Hiding Powered By branding.

Contact Vs Member records

Redirection Notice
This page will redirect to Contacts vs members.

Log of Sent Emails

Redirection Notice
This page will redirect to Email log.

Record Payment and Settle to Invoice

Redirection Notice
This page will redirect to Recording payments and credits, and settling invoices.

Widgets - integrating Wild Apricot into another website

Redirection Notice
This page will redirect to Using widgets to add Wild Apricot functionality to other websites.

How to include a login box on a non-Wild Apricot site

Redirection Notice
This page will redirect to Adding Wild Apricot login boxes to another site.

Email setup and WildApricot

Redirection Notice
This page will redirect to Using email hosting services.

Search Engine Optimization (SEO) Tools - Page Title and Meta Tags

Redirection Notice
This page will redirect to Search engine optimization (SEO).

Login in to your account

Redirection Notice
This page will redirect to Logging into your account.

Unsubscribing to email lists

Redirection Notice
This page will redirect to Unsubscribing to emails.

Redirects for version 4.5

PayPal Direct Payment

Redirection Notice
This page will redirect to PayPal Payments Pro.

PayPal Standard

Redirection Notice
This page will redirect to PayPal Payments Standard.

Using widgets to add Wild Apricot functionality to other websites

Redirection Notice
This page will redirect to Adding Wild Apricot functionality to other websites.

Resending or printing invoices and receipts

Redirection Notice
This page will redirect to Emailing or printing invoices and receipts.

GoDaddy DNS setup example

Redirection Notice
This page will redirect to GoDaddy DNS setup instructions.

Redirect to another page

Redirection Notice
This page will redirect to Redirecting a page.

Blog pages

Redirection Notice
This page will redirect to Setting up and using blogs.

Forum pages

Redirection Notice
This page will redirect to Setting up and using discussion forums.

Photo album pages

Redirection Notice
This page will redirect to Photo albums.

Online forms

Redirection Notice
This page will redirect to Inserting custom forms.

Subpages and multi-level pages

Redirection Notice
This page will redirect to Reordering and grouping menu pages.

Inserting HTML or JavaScript

Redirection Notice
This page will redirect to Inserting and modifying HTML or JavaScript.

Membership renewal policy

Redirection Notice
This page will redirect to Membership renewal settings.

Inserting HTML forms

Redirection Notice
This page will redirect to Inserting custom forms.

Adding flash to your site

Redirection Notice
This page will redirect to Adding Flash animations to your site.

Embedded photo galleries

Redirection Notice
This page will redirect to Embedding external photo galleries.

Referral summary

Redirection Notice
This page will redirect to Referrals.

Working with support tickets

Redirection Notice
This page will redirect to Working with support requests.

Specific event widget

Redirection Notice
This page will redirect to Event details widget.

Member profile widget

Redirection Notice
This page will redirect to Contact profile widget.

Individual vs. Organization record

Redirection Notice
This page will redirect to Organization memberships.

Inserting documents

Redirection Notice
This page will redirect to Inserting documents and files.

Customizing header background settings for themes

Redirection Notice

This page will redirect to Customizing theme backgrounds.

Customizing the appearance of your site

Redirection Notice
This page will redirect to Customizing your site.

MainConfig.cfg parameters

Redirection Notice
This page will redirect to Customizing main theme parameters.

Changing the site background

Redirection Notice
This page will redirect to Customizing colors and styles.

Hiding the lock icon on restricted pages

Redirection Notice
This page will redirect to CSS customization.

Removing an extraneous scroll bar

Redirection Notice
This page will redirect to CSS customization.

API calls

Redirection Notice
This page will redirect to API V1 calls.

API status codes

Redirection Notice
This page will redirect to API V1 status codes.

Accounts API call

Redirection Notice
This page will redirect to Accounts API V1 call.

MembershipLevels API call

Redirection Notice
This page will redirect to MembershipLevels API V1 call.

ContactFields API call

Redirection Notice
This page will redirect to ContactFields API V1 call.

Contacts API call

Redirection Notice
This page will redirect to Contacts API V1 call.

API browser

Redirection Notice
This page will redirect to API V1 browser.

Base API call

Redirection Notice
This page will redirect to Base API V1 call.

Adding new events

Redirection Notice
This page will redirect to Setting up events.

Viewing attendees for all events

Redirection Notice
This page will redirect to Searching for contacts with event registrations.

Sample API V2 application

Redirection Notice
This page will redirect to Sample API V2 applications.

Member list

Redirection Notice
This page will redirect to Member summary and member list.

Food Service theme set

Redirection Notice
This page will redirect to Fiesta theme set.

Color and style settings for Food Service themes

Redirection Notice
This page will redirect to Color and style settings for Fiesta themes.

Customizing event emails

Redirection Notice
This page will redirect to Event emails.

Processing credit card option for administrator

Redirection Notice
This page will redirect to Processing credit card payments in admin view.

Inserting a favorites icon (aka favicon)

Redirection Notice
This page will redirect to Inserting a favorites icon.

Setting up and using blogs

Redirection Notice
This page will redirect to Blogs.

Setting up and using discussion forums

Redirection Notice
This page will redirect to Discussion forums.

Adding text search to your site

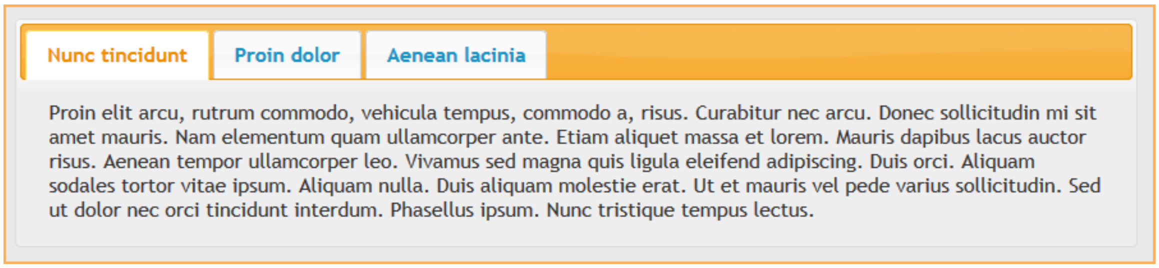
Redirection Notice
This page will redirect to Site searches.

Adding jQuery widgets

Adding jQuery widgets

jQuery is a cross-platform JavaScript library designed to simply the development of plugins. Using the jQuery library, experienced website developers can add custom elements to Wild Apricot pages. For example, they could add tabbed widgets, sling news feeds, and collapsible content panels called accordions.

In this topic, we'll show you how to use jQuery to add custom elements to Wild Apricot pages. As an example, we'll add a tabbed widget – a single content area with multiple panels.



To add a tabbed widget, follow these steps:

1. Go to http://jqueryui.com/download and download the elements you require. For the tabbed gadget, we'd download the UI core and the Tabs widget.
2. Enable theme overrides and download the theme files.
3. From the jQuery archive you downloaded, copy **css/ui-lightness/jquery-ui-1.10.4.custom.css** and the **css/ui-lightness/images/** folder to the **/Styles/** folder within your downloaded theme files. After copying, you have a **/Styles/jquery-ui-1.10.4.custom.css** file and a **Style s/images**/ folder.
4. Upload the new file and folder to the corresponding Theme_Overrides subfolders on your site via File management or WebDAV.
5. Add a custom HTML gadget to the Wild Apricot page where you want the tabbed widget to appear, and add the following code:

```
<div id="tabs">
<ul>
<li><a href="#tabs-1">Nunc tincidunt</a></li>
<li><a href="#tabs-2">Proin dolor</a></li>
<li><a href="#tabs-3">Aenean lacinia</a></li>
</ul>
<div id="tabs-1">
<p>Proin elit arcu, rutrum commodo, vehicula tempus, commodo a, risus. Curabitur
 nec arcu. Donec sollicitudin mi sit amet mauris. Nam elementum quam
ullamcorper ante. Etiam aliquet massa et lorem. Mauris dapibus lacus
auctor risus. Aenean tempor ullamcorper leo. Vivamus sed magna quis
ligula eleifend adipiscing. Duis orci. Aliquam sodales tortor vitae
ipsum. Aliquam nulla. Duis aliquam molestie erat. Ut et mauris vel pede
varius sollicitudin. Sed ut dolor nec orci tincidunt interdum. Phasellus
 ipsum. Nunc tristique tempus lectus.</p>
</div>
<div id="tabs-2">
<p>Morbi tincidunt, dui sit amet facilisis feugiat, odio metus gravida ante, ut
pharetra massa metus id nunc. Duis scelerisque molestie turpis. Sed
fringilla, massa eget luctus malesuada, metus eros molestie lectus, ut
tempus eros massa ut dolor. Aenean aliquet fringilla sem. Suspendisse
sed ligula in ligula suscipit aliquam. Praesent in eros vestibulum mi
adipiscing adipiscing. Morbi facilisis. Curabitur ornare consequat nunc.
 Aenean vel metus. Ut posuere viverra nulla. Aliquam erat volutpat.
Pellentesque convallis. Maecenas feugiat, tellus pellentesque pretium
posuere, felis lorem euismod felis, eu ornare leo nisi vel felis. Mauris
 consectetur tortor et purus.</p>
</div>
<div id="tabs-3">
<p>Mauris eleifend est et turpis. Duis id erat. Suspendisse potenti. Aliquam
vulputate, pede vel vehicula accumsan, mi neque rutrum erat, eu congue
orci lorem eget lorem. Vestibulum non ante. Class aptent taciti sociosqu
 ad litora torquent per conubia nostra, per inceptos himenaeos. Fusce
sodales. Quisque eu urna vel enim commodo pellentesque. Praesent eu
risus hendrerit ligula tempus pretium. Curabitur lorem enim, pretium
nec, feugiat nec, luctus a, lacus.</p>
<p>Duis cursus. Maecenas ligula eros, blandit nec, pharetra at, semper at,
magna. Nullam ac lacus. Nulla facilisi. Praesent viverra justo vitae
neque. Praesent blandit adipiscing velit. Suspendisse potenti. Donec
mattis, pede vel pharetra blandit, magna ligula faucibus eros, id
euismod lacus dolor eget odio. Nam scelerisque. Donec non libero sed
nulla mattis commodo. Ut sagittis. Donec nisi lectus, feugiat porttitor,
 tempor ac, tempor vitae, pede. Aenean vehicula velit eu tellus interdum
 rutrum. Maecenas commodo. Pellentesque nec elit. Fusce in lacus.
Vivamus a libero vitae lectus hendrerit hendrerit.</p>
</div>
</div>
```

6. Click the **Settings** menu then click **Global JavaScript** (under **Site settings**).
7. In the code box that appears, enter the following code to activate the tabbed widget.

```
<script src="//code.jquery.com/ui/1.11.1/jquery-ui.js"></script>
<script>
$(function() {
  $( "#tabs" ).tabs();
});
</script>
```

8. Click **Save** to save your code.
9. Return to the Theme overrides screen and rebuild the theme.

For more information on using jQuery to add tabbed widgets, click here.

Connecting gadgets and controls to themes

Redirection Notice
This page will redirect to Customizing theme elements.

Upcoming releases

Redirection Notice
This page will redirect to Product roadmap.

Color and style settings for Bookshelf themes

Redirection Notice
This page will redirect to Color and style settings for Bookshelf and Whiteboard themes.

Color and style settings for all other themes

Redirection Notice
This page will redirect to Color and style settings for Aurora, Glass, Keynote, Memo, Nature, and Notebook themes.

Search engine optimization (SEO)

Redirection Notice
This page will redirect to Search engine optimization.

Gadget model properties

Redirection Notice
This page will redirect to Technical reference.

Page model properties

Redirection Notice
This page will redirect to Technical reference.

Theme inheritance diagram

Redirection Notice
This page will redirect to Technical reference.

Release history archive

Redirection Notice
This page will redirect to Browser application release history.

Getting started with websites

Redirection Notice
This page will redirect to Site setup and customization.

Getting started with membership management

Redirection Notice
This page will redirect to Member and contact management.

Event registration types

Redirection Notice
This page will redirect to Registration types and settings.

Wild Apricot mobile app

Redirection Notice
This page will redirect to Wild Apricot mobile app - iOS.