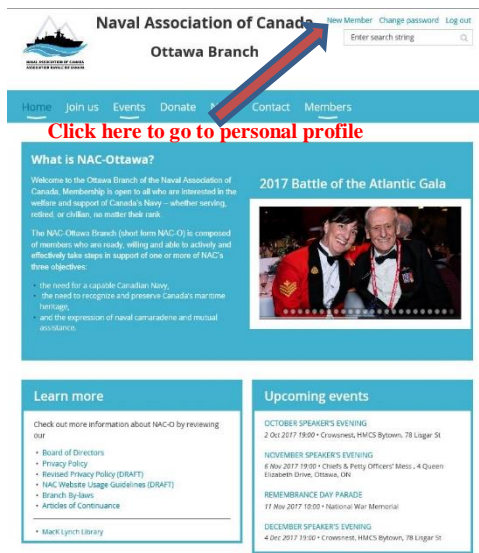# WORKING WITH WILD APRICOT

Introduction

By now, you will have heard of the new online membership management system rolled out by the NAC-Ottawa to its current members at the end of September. The new system uses the Wild Apricot application used by many not-for-profit associations. It is secure, private and fast - and will offer significant improvements in efficiency and options to the Branch. This article describes the benefits expected, and some information about how to find and manage key elements of your profile.

For members it will allow direct access and control of your membership account – including its status, the information it contains, and how it may contact you – in addition to accessing a membership directory and getting information on activities and events. Registrations for events, donations, and membership renewals can be made directly and with immediate effect – with automated confirmation and receipt.

For Branch directors, this degree of self-service frees up significant time spent receiving and responding to requests by a variety of means and manually initiating much of the action and coordination needed. The Branch will maintain manual support of memberships for those that do not have or cannot use on-line services. However, while there will be a degree of automated tracking for invoicing and payments, the Treasurer will be busy reconciling these new data records against branch banking as well as towards reports and annual tax receipts. For the most part, directors will be able to look more at the services provided to members rather than the processes to deliver them.

Using Your Account

Existing members will have received instructions on how to access their profiles. New members will be able to join quickly online from the public home page at https://nac-o.wildapricot.org/. Off-line applications, if necessary, are also available by request and can be mailed or emailed to the NAC-Ottawa Membership Director for entry into the system (a copy is in this edition).

All of the features on the home page and drop-down menus are generally user friendly and easy to navigate, and will not be elaborated on here. Additional features and services only available to members are listed under a "Members" tab that will appear on the home page after logging-in.

That includes a basic Membership Directory, and a Help Guide for new members with instructions on key features you can adjust with your membership. These include important options that are available only from their personal profile page. Members will need to access these features regularly. You can go to your personal profile by clicking your account name at the top of the HOME page.

Ottawa Branch

Home   Join us   Events   Donate   News   Contact   Members

Home > My profile

My profile

Click here to edit personal profile

Edit profile   My directory profile

Profile   Privacy   Email subscriptions   Member photo albums   Invoices and payments

Privacy Optons

Membership details

Opt-In & Email preferences

Membership level   Regular - $90.00 (CAD)
Subscription period: 1 year, on January 1st
No recurring payments

Membership status   Active

Member since   28 Sep 2017

Renewal due on   1 Jan 2018

Renew to 1 Jan 2019

User ID   41790700

Initials

Usual/Preferred first name   Newbie

First Name   New

Surname   Member

Email   new.member@inmydomain.ca

Partner Name   Angel

Phone   (613) 123-4567

Cellular   (613) 7654-321

Avatar

Street   100 Makebelieve Lane

Click here to renew membership (for next year)

It is strongly recommended that you update your profile at your earliest convenience. There are many actions and options for you to consider. Initially set in a default state for the roll-out of existing members, you can choose to adjust them at any time. Most are done from your profile page as shown here.

A member's profile is seen over three pages. The primary information - "Membership details" - is shown on the first page you are taken to. Important options and preferences particular to your profile are shown on the other two pages that must be selected using the hyperlinks shown. The "Edit profile" action button at the top of the page is common to all three pages. It opens the editing function appropriate to each option. Remember to save any edit page when done before returning.

The "Edit profile" button on this page opens entry boxes for the entries that members can update. Ensuring your profile information is current and correct is particularly important after the initial roll-out for existing members as much has been on old records for some time. While your personal profile contains much information, most is used only for internal administrative purposes.

Very little of the personal information is made available to other members through the Directory. The items shared can be seen by selecting the "PRIVACY" hyperlink to open the "Details to show" page. From there, the edit button allows members a choice of whether to further open or close each entry – can seen by anybody, just members, or no one (other than administrators).

Of more importance are the options on the "Email preferences" page. This is an increasingly complex requirement as elements of the Canadian Anti-Spam Law (CASL) take effect requiring your consent to be sent commercial or promotional emails. Under CASL, consent is implied for members and other users in an association or voluntary organization. As such, except for a few who had requested no emails, members were set to "opted-in" during transition, and will receive all NAC emails. The edit button allows members to refine the category of emails they wish to receive (automated notifications and/or manual informational emails). Members can also choose to "opt-out". If opted-out, members will still receive "workflow" messages essential to membership management and selected registrations, but will lose much of the news and informational services that come with membership. New applicants will have to make their own Opt-in/Opt-out choice, but will also receive all emails unless they choose to Opt-out.

The "Renew to…." action button in the middle of the main profile page is the other action button of interest to members soon. While the next due date required for your membership is shown, the renew button can be used at any time. However, it is only available for the next membership year (if unpaid). Otherwise, reminders will be sent automatically during the renewal campaign, and prompts once it is overdue. Members will be able to see the status of their account anytime,

and surprise double payments can now be avoided. When used, the edit button leads to a brief renewal sequence and a choice to pay directly online or be sent an invoice.

Those are the principal actions and options that new members will need to visit in their accounts shortly. They are reasonably self-explanatory and user friendly once you find them. And all member functions are explained in the Help Guide available on the Members page.

Our new website was designed to initially replicate the functionality of the old website with enhanced efficiency and response. The site is still in a formative stage, and can do much more. There will be ongoing developments and improvements as the directors and members learn to use the system and exploit its full potential. Your feedback and ideas are most welcome. Problems and challenges should be brought to the attention of the membership director at naco.membership@gmail.com.