



# *Completing the JotForm*

Guidance for Committee Chairs

# JotForm Instructions



1. Make sure you have a completed Event Write-Up, Photo/Logo and Budget ready.
2. If you have an electronic document for the Event Write-Up (even an email) open it in a separate tab in your browser.
3. Make sure the photo(s) or logo you want to use are in .png or .jpeg format. Download images to your desktop or open the email or text message where the images are available as attachments.
4. In a **NEW WINDOW**, open Wild Apricot website: <https://www.sbnewcomers.org/>
  - a. Log in as Committee Chair: [XXX@sbnewcomers.org](mailto:XXX@sbnewcomers.org) Password:
  - b. Go to “Chairs” tab
  - c. Click on “Forms” – blue box
  - d. Click on “JotForm”
5. *Tip: Resize the Wild Apricot window to fill the left half of your screen and resize the window with your browser tabs to fill the right half of your screen - they should not be overlapping. This way you can copy and paste back and forth without having to navigate between tabs or windows.*
6. To fill out the JotForm, follow procedure in this presentation.



Santa Barbara  
Newcomers Club

## Event Submission Form

**Note:** Events must be submitted by noon Wednesday if registration is to open the following Tuesday, otherwise it may result in a delayed posting.

### SUBMITTER CONTACT INFORMATION

Today's Date: \*

01/07/2025

Your Name \*

First Name

Last Name

Your Phone Number \*

(000) 000-0000

Who can we contact with questions about this event?

Your Email \*

Who can we contact with questions about this event?

## SUBMITTER CONTACT INFORMATION:

1. Enter your name
2. Enter your phone number
3. Enter your email

*This information is used to contact you if there are questions about the event.*

*This information should “auto-fill” after the first time you complete the JotForm.*

## EVENT TYPE

What type of event is this? \*

- ☒ Ticketed - for events requiring registration. (i.e. if you want to know who is attending the event) This should be selected for PAID EVENTS, as well as FREE EVENTS REQUIRING REGISTRATION
- ☐ Public - for free events that DO NOT REQUIRE REGISTRATION, must be public location events (i.e. TGIF, Stride by the Tide, Weekend Amblers, etc)
- ☐ A revision to an already posted or submitted event.

## Event Details

Committee Name: \*

Test

Title of the Event: \*

Test Event

Event titles should be concise and under 70 characters so that they are best displayed on the calendar and eNews. Please refrain from sharing the event location in this title.

Is the LOCATION of the event written in the above Title of the Event? \*

- ☒ No
- ☐ Yes

## EVENT TYPE:

Select your event type - most events will be TICKETED, requiring registration.

\*If you need to make a REVISION to a previously submitted JotForm, choose this option - you'll be guided to provide your revised information.

## EVENT DETAILS:

- Enter your committee name and the name of the Event

*\*Do not include the actual location in the event title if at all possible- be creative! This is for security reasons since event titles are on the public Newcomers website.*

Event Date: \*  

Is there a cost associated with this event? \*

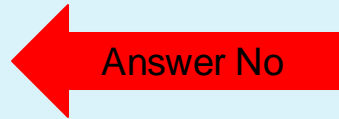
☐ No - this is a free event, or pay-as-you go (members will pay their own bill at the event)

☒ Yes

Will this event be hosted at, promote, or advertise a member's personal business or a business in which a member has a financial interest? \*

☐ Yes

☒ No



## EVENT DATE:

Click on the field, a calendar will populate, and you can click on the date.

## EVENT COST:

If your event will be FREE, select “NO.” In this case, there will be no budget section to fill out in the JotForm.

**Most events have a cost associated,** and you should have **Event Budget details** for this event. Select “YES,” and this will prompt the next page to be the budget form.

**Pop-up Question** - This question is here as a reminder that, per the Newcomer by-laws, the answer should be “No.” If you have questions, check with your VP for Activities.

## Budget Approval Requirements

1. **Up to \$1500:** VP of Activities Approval
2. **More than \$1500:** VP of Activities, Treasurer, and President Approval

## Instructions

1. Only fill in values for applicable Expense Categories
  - **Per Person Fees** - only fill in row 2 if this is a ticketed event such as a show, concert, or requires a admission ticket fee.
2. **Number of Paying Attendees:** The top highlighted yellow cell, is required to calculate the total cost.
3. **Minimum Cost to Run the Event:** Please indicate the minimum amount required to cover the essential expenses of this event. This is the lowest cost at which the event can proceed, even if the number of registrants does not meet the expected total.

This figure should reflect the bare minimum needed to avoid a financial loss while still delivering a quality experience for attendees.

## BUDGET APPROVALS:

All events that incur cost will be required to fill out the Budget Form section of the JotForm. When the JotForm is reviewed by your VP of Activities, the budget will be approved at the appropriate level.

## BUDGET ENTRIES:

You only need to fill in the fields that apply to your event.

Expense Category	Directions	Subtotal
Total Number of Attendees	<i>Including Working Committee and free host/guest</i>	12
Per Person Fees (for shows, concerts, etc)	<i>Total per registrant, including taxes &amp; fees</i>	10.00
Presenter/Artist.	<i>Including all taxes &amp; credit card fees.</i>	100
Facility	<i>Including all taxes &amp; credit card fees.</i>	
Rentals	<i>Including all taxes &amp; credit card fees.</i>	
Food	<i>Including all fees, taxes, and 20% gratuity.</i>	50
Beverages	<i>Including all fees, taxes, and 20% gratuity</i>	
Other	<i>I.e. Gift Cards, Prizes, or other auxiliary expenses.</i>	
Subtotal		270
Wild Apricot Credit Card Fee	<i>5% of Subtotal</i>	13.5
<b>Total Cost</b>		<b>283.5</b>

## TOTAL ATTENDEES:

Includes Working Committee and any non-paying Host (plus Host's Guests) as allowed by policy.

## PER PERSON FEES:

Use this only for events where it applies.

## OTHER EVENT EXPENSES:

Expenses can be broken out into these categories.

## TOTAL COST:

The Budget Form will calculate the subtotal, credit card fees, and total cost.

Total Number of Paying Attendees		10
<b>Total cost per person</b>	<i>Includes \$1 Admin Fee</i>	<b>29.35</b>
<b>Minimum Registrants</b>	<i>The bare minimum needed to avoid a financial loss.</i>	
<b>When to Cancel</b>	<i>Cancellation date if registration numbers have not been reached.</i>	

## TOTAL COST PER PERSON:

Here you will enter the total number of Paying Attendees (vice the total number of attendees including non-paying Host, etc).

The Budget Form will calculate the total cost person. You will use this amount to determine what the ticket price for your event will be, which you will enter below.

## MINIMUM REGISTRANTS/CANCELLATION:

Consider your FIXED COSTS to determine your break-even number of Paying Attendees. Check with your vendor or presenter to determine the date you need to cancel if you don't have a break-even enrollment.

What is the "Total cost per person" listed in the table above? \*

15

This will be the "Ticket Price" for your event. If you'd like to round that number up, please do so here.

Are all taxes, credit card fee %'s, and any other additional fees included in your subtotal? \*

☒ Yes  
☐ No

## TOTAL COST PER PERSON:

What you enter in this field will be the **Ticket Price** for the event.

It will usually be rounded up slightly from the actual Total Cost per Person, and allows you to account for total expenses if the event does not sell out. The objective is not to make a profit, but rather not to lose money if the event doesn't have the maximum number of Paying Attendees.

## TAXES AND CREDIT CARD FEES:

This is a reminder to consider extra fees, especially for admission fees, or supplies, that are included in the budget as costs.

## RESTRICTED EVENT DETAILS

Restricted events require registration or an RSVP. If this event is open to the public, please select the "back" button below and under "What type of event?" select "Public".

Registration Opens (MUST be a Tuesday): \*

If the event is submitted before noon on a Wednesday, registration can open as early as the upcoming Tuesday. However, if the event is submitted after that, it will not open for registration until the Tuesday two weeks from now.

Is this event going to be held in someone's home? \*

☐ No

☐ Yes (If yes, please provide the address in the "Additional Information" box below)

## RESTRICTED EVENT DETAILS:

### Registration Opens:

Click on the field, and select the first Tuesday that is in **bold type**. The deadline for getting an event to be live for registration on a Tuesday is the previous Wednesday at noon.

### Event in Someone's Home:

Select "YES" only for events held in a private home - it does not have to be a Committee member's home, or even a Newcomer's home, but the home must have been vetted by the SBNC House Registrar.

## When and Where

Location Name: \*

Location Name: (Private)

Private Home - The address will be visible under "A

Default text for "Private Home" locations to be used by posting team.

Location Address (public location only): \*

Street Address

Street Address Line 2

City

State / Province

Postal / Zip Code

## EVENT LOCATION:

Enter the name of the location - such as "Santa Barbara Rescue Mission." For private residences, you can put "Private Home" in this field.

Enter the street address of the location.

**For Private Homes** - this information will only be provided to the registrants in the Reminder Emails.

**For Public Locations** - this information will be part of the Event Listing details (not the Event Title) available to be viewed by Newcomers on the Event Calendar.

Event Date:

02-26-2025



Auto-filled based on the Event Date filled in on the first page of this form.

Event Time

10:00

AM ▼

to

12:00

PM ▼

Hour Minutes

Hour Minutes

## EVENT DATE:

The event date should pre-populate from the date entered earlier.

## EVENT TIME:

Enter the beginning and ending times. Be careful to confirm AM or PM on the time.

Is this event a series? \*

☐ No

☒ Yes

What are the registration requirements for this event? \*

☐ Option 1: None - does not require registration, this is a public reoccurring event.

☐ Option 2: (most common) Registration is required for each reoccurring event date.

☐ Option 3: (not common) One Time Registration - members register once and are enrolled for every reoccurring event following that.

Frequency of event \*

☐ Daily

☐ Weekly

☐ Monthly

☐ Annually

☐ Other

Please list all of the dates that this event should take place. \*

End date of event series \*

MM-DD-YYYY

i.e. the final date this event should take place

## SERIAL EVENTS:

This option should be used for events that take place over a series of days or times... such as a golf clinic that will happen over four Saturdays (Option 3).

Enter the details as they apply to your event. If you have questions, confer with your VP for Activities before you complete the JotForm.

Upload Event Picture Here:



  
**Browse Files**  
Drag and drop files here

Pictures must be in jpg, jpeg, or png format. Max upload is 2 pictures.

Event Description: \*

Type here...

Additional Event Information -  
sent to REGISTRANTS only \*

Type here...

A good example of information to put in here would be driving directions, parking instructions, or a PRIVATE ADDRESS.

## EVENT PICTURE

Find the **Event Photo or Logo** you downloaded earlier, or open the document where you have the image attached.

Drag it over to the JotForm browser window and into the “Browse Files” box.

Alternatively, you can click the “Browse Files” box, and it will open your Finder or file directory on your computer where you can select the image file(s) you want to use.

A thumbprint of the photo(s) should appear below the box with the file name.

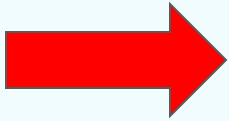
You can upload up to 2 photos here.

Upload Event Picture Here:

  
**Browse Files**  
Drag and drop files here

Pictures must be in jpg, jpeg, or png format. Max upload is 2 pictures.

Event Description: \*



Type here...

Additional Event Information -  
sent to REGISTRANTS only \*

Type here...

A good example of information to put in here would be driving directions, parking instructions, or a PRIVATE ADDRESS.

## EVENT DESCRIPTION:

Include an INVITING and COMPELLING description of your event!! You have space for a couple of paragraphs to get Newcomers excited to attend your event!

COPY the event description and PASTE into the Event Description field – or type it in, if you don't have a source document.

Check that the paragraphs are separated properly. You may need to insert spaces between the paragraphs.

Upload Event Picture Here:

  
**Browse Files**  
Drag and drop files here

Pictures must be in jpg, jpeg, or png format. Max upload is 2 pictures.

Event Description: \*

Type here...

Additional Event Information -  
sent to REGISTRANTS only \*



Type here...

A good example of information to put in here would be driving directions, parking instructions, or a PRIVATE ADDRESS.

## ADDITIONAL INFORMATION:

Enter any additional information for registrants only - such as parking instructions, or dress code.

### Registration Settings

Event Registration Limit (i.e. maximum number of attendees) \*

ex: 20

Includes working committee, hosts, guests, etc.

Open waitlist if registration fills? \*

☒ Yes

☐ No

## REGISTRATION SETTINGS:

Confirm the number of registrants you want for the event.

Respond “YES” to the question about opening the waitlist if registration fills.

## Ticket Types

Who can register for this event? \*

- ☒ Working Committee (committee members working the event) ☒ Newbies ☒ Newcomers (including Extended Newcomers) ☐ Hosts (for events held in a private home where a member is the home host)

Ticket Price (autofilled - if this is incorrect, or you would like to round up, please return to page 2 to review your budget submissions) \*

15

By default all registrants will be charged this rate upon registration (including working committee members and hosts). If a different price should be applied for working committee members or hosts, please explain why in the Comments for Activities VPs and/or Posting Team at the end of this form.

Number of Working Committee Members: \*

ex: 2 (minimum of 1 required)

Max 1 per every 4 guests.

Working Committee and/or home Host Registration Passcode \*

Enter a passcode that the working committee and/or host member(s) will use to register.

Registration Closes: \*

01-20-2025

This can be on the event date, or any day prior. Default is the day prior to the event. This is the date that registration closes for all members, including working committee and hosts.

## TICKET TYPES:

The default is pre-populated. This is fine unless you want to invite a HOST who is not a NEWCOMER. (See SBNC rules for hosts)

## TICKET PRICE:

The ticket price from the Budget Form section of the JotForm will pre-populate here.

## WORKING COMMITTEE:

Enter the number of Working Committee members.

Enter the passcode: **(your passcode here)**

## REGISTRATION CLOSES DATE:

This date will pre-populate.

### Event Organizer

By default, the Event Organizer will be listed as the Committee Chair(s) and their email is used as the reply-to for announcements and reminders and receives copies of all event emails.

Who should members contact about this event (i.e. the Event Organizer)? \*

☒ The committee chair(s)

☐ A working committee member

Committee Name

Arts

This field can be edited by selecting the "back" button below and returning to the first page.

Which (if any) emails should the Event Organizer be copied on? \*

- ☐ Registration Confirmation
- ☐ Pending Registration - payment is still required
- ☐ Event Registration Cancelled
- ☐ New Waitlist Registration
- ☒ None of the Above - please don't copy Event Organizer on any emails

All emails are selected by default

## WHO SHOULD MEMBERS CONTACT:

**Your choice** - registrants can be directed to the Committee Chair(s) or the relevant Working Committee member (a pop-up will allow you to enter the Working Committee member's name)

## COMMITTEE NAME:

This will pre-populate.

## WHICH EMAILS TO BE COPIED ON:

**Your choice** - you can decide which emails you want to receive. You can also track registration information in Wild Apricot.

Comments for Activities VPs  
and/or Posting Team



## COMMENTS FOR ACTIVITIES VPS:

Leave blank unless there are any unusual conditions that you want to explain to the VP for Activities.

***THAT'S IT - HIT "NEXT" AND ON THE  
NEXT PAGE HIT "SUBMIT."***

CONGRATULATIONS!

# Final JotForm Tips



1. Once you have successfully submitted the JotForm, you'll get a new window that allows you to create a new one, or close out.
2. You should receive an email confirmation that your JotForm was successfully submitted. Update any log that you might keep with the date you submitted the JotForm and the date the registration will open.
3. It's a good idea to check on Sundays, when the E-News comes out, that the events you have posted are on the Event Calendar, and read over them to make sure they are correct. If you need to make corrections or adjustments, you can open a new JotForm and under EVENT TYPE, select the "Revision to an already posted or submitted event" and enter your requested corrections. If needed, send an email or text to your VP for Activities. ONLY the VP of Activities and the Posting folks on the SBNC Board can/should make changes to the Event once it's in the system.
4. Once you've confirmed that the Event is on the Event Calendar, send an email and/or text to the Working Committee members and ask that they register for the Event as Working Committee - using the passcode - otherwise the Event may get filled up without them. Working Committee can pre-register on Sunday and Monday before the event is open for regular registration.