



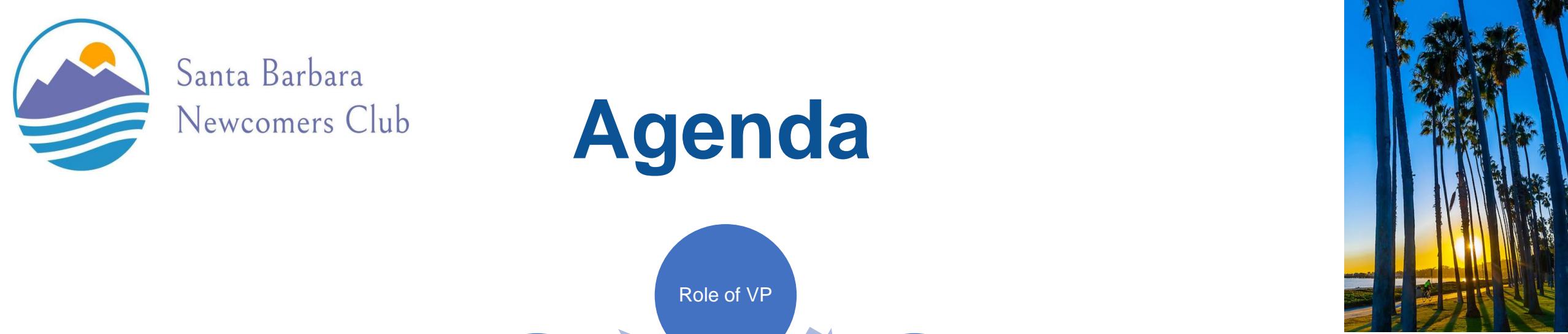
Santa Barbara  
Newcomers Club



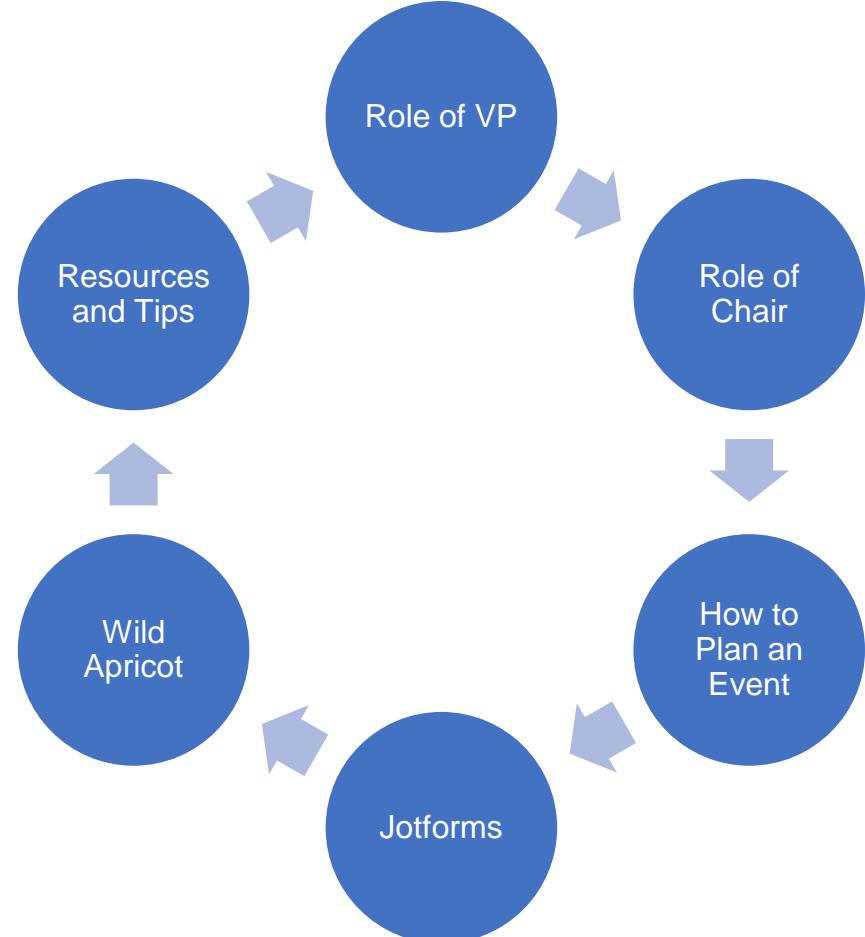
Committee Chair Training  
January 27th

# Welcome!

Carolyn O'Mara and Jenifer Beatty  
Co-VPs of Activities



# Agenda



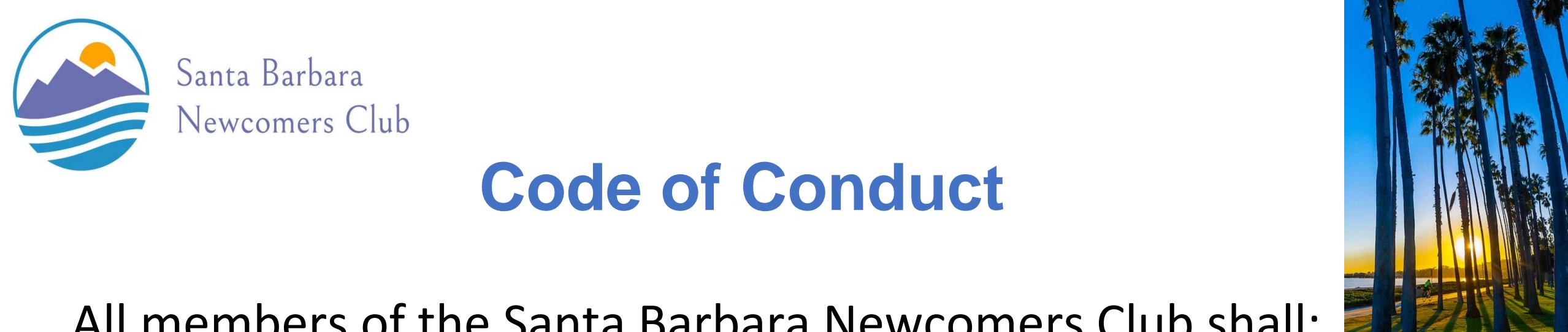


Santa Barbara  
Newcomers Club

# Purpose Of The Santa Barbara Newcomers Club



*The purpose of the Club shall be to promote friendship and to aid in the social, cultural and philanthropic orientation of persons new to the Santa Barbara area.*



# Code of Conduct

All members of the Santa Barbara Newcomers Club shall:

- Treat all members with kindness and respect, and avoid demeaning, discriminatory or harassing speech or other similar behaviors.
- Be honest and truthful in all interactions with other members and when acting on behalf of the Club.
- Represent the Club in a respectful and dignified manner.



## Role of Activities VPs

### 1 Support Committee Chairs

2. Approve Jotforms
3. Watch Calendar for scheduling conflicts
4. Attend monthly Board meetings
5. Uphold the Purpose of the Club and Code of Conduct



# Activities VPs Committee Assignments

## Carolyn O'Mara

Arts  
Afternoon Book Club  
Beer Lovers  
Games  
Girls Night Out  
Lawn Bowling  
Newbie Meet & Greet/Orientation  
Out to Lunch  
Knitting  
Pop Up  
Sunday Social  
TGIF  
Weekend Amblers  
Wellness  
Wine Appreciation

## Jenifer Beatty

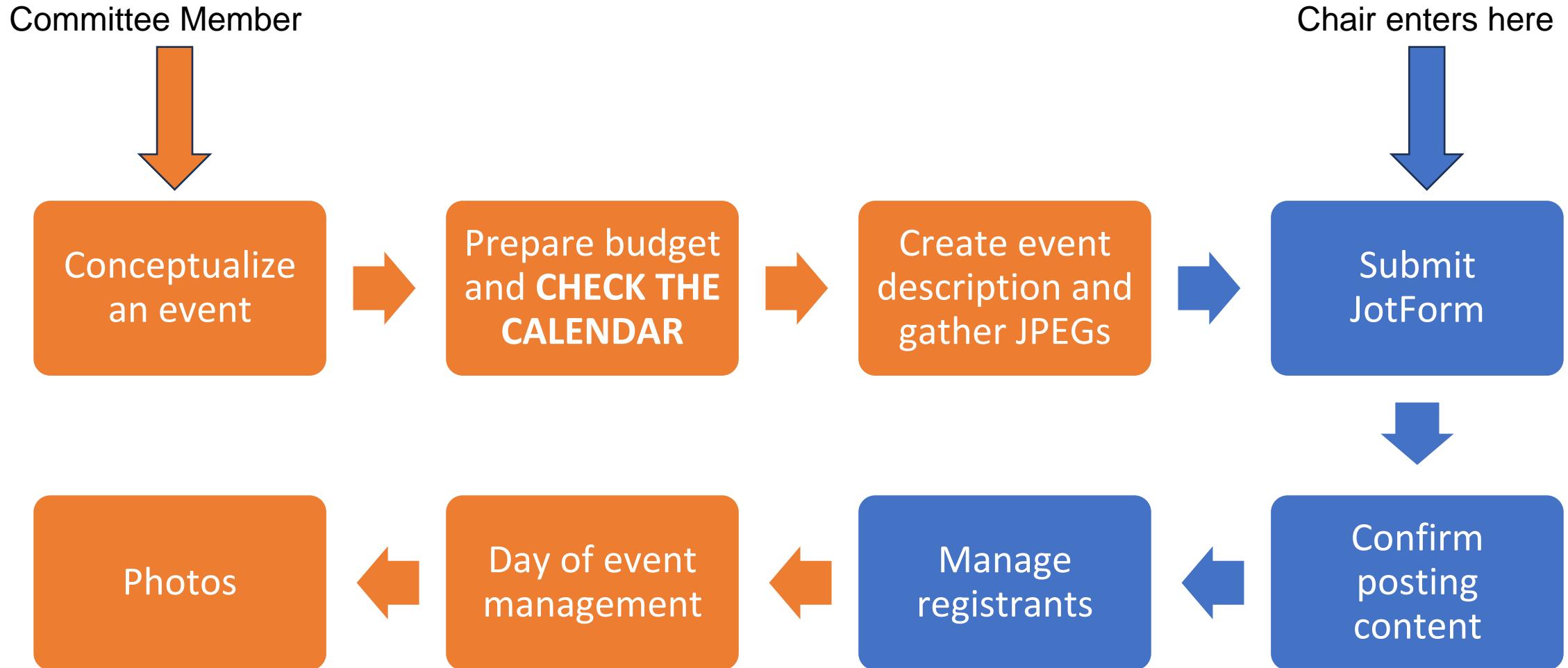
Cycling  
Dance Party  
Dining In  
Epicurious  
Evening Books and Bites  
Golf  
Happy Hikers  
Habelmos Espanol  
Local Heritage  
Mas Musica  
Snow Sports  
Theater Lovers  
20-40 Somethings  
Volunteers in Action



## **Roles of a Committee Chairperson**

- 1. Oversee the execution of events**
2. Hold monthly meetings
3. Attend monthly Board meetings
4. Uphold the Purpose of the Club, By-laws, and the Code of Conduct

# Executing a New Event





Santa Barbara  
Newcomers Club



# Job of Chair is Like a Director of a Play

## Before event:

1. Oversee event and calendar
2. Submit jot form (4-6 weeks in advance) by noon Wed.
3. Monitor waitlist and offer refunds **if permitted**

## After Event:

Submit pictures to [marketing@sbnewcomers.org](mailto:marketing@sbnewcomers.org)



Santa Barbara  
Newcomers Club



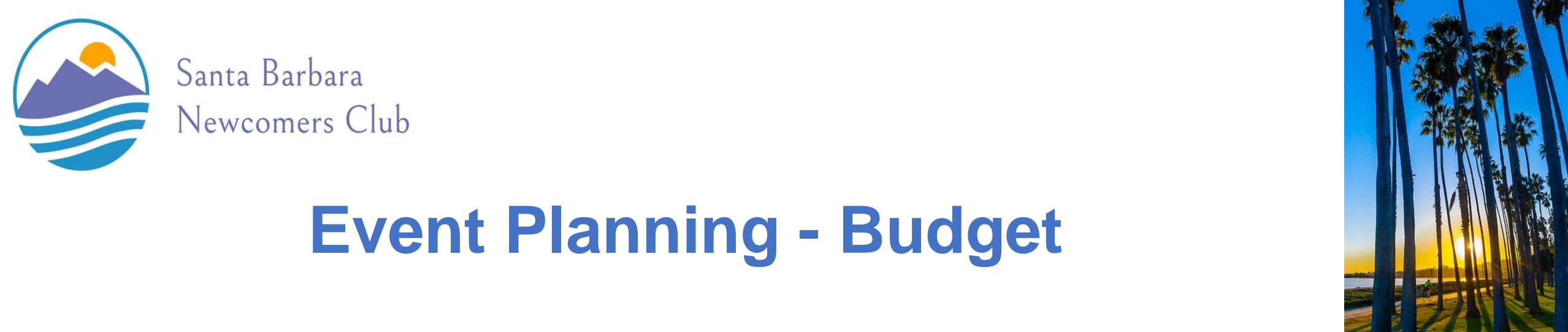
# Committee Members are the Actors

## Before the event

1. Main point of contact with organization
2. Figure out budget/target cost per registrant
3. Submit to chair all details
4. Retrieve needed items from storage (i.e. red sign, nametags, table...)
6. Sign up as working committee before other registrants can sign up
- 7 Arrive early/stay late and act as host: **CIRCLE INTRODUCTIONS AND HIGHLIGHT NEWBIES!**

## After the event:

1. Send multiple pictures to chair (vertical)
2. Return storage items



## Event Planning - Budget

VPs of Activities will approve up to \$1500.

President, Treasurer and VP Activities will approve over \$1500.



# How to Find a Location

House Registrar: Liz Benson



- There is a list of vetted homes for SBNC's use.
- Chairs and their committees are encouraged to find new homes for events. Many of the hosts on the current list have hosted numerous events, especially those who can host above 20 guests
- Club Events (any posted event for which members register or sign up), can only be held at homes that have been vetted
  - This does not apply to commercial or public venues
  - A house does not need to be vetted for Committee meetings

For any questions or assistance, please reach out to: [houses@sbnewcomers.org](mailto:houses@sbnewcomers.org)



# Non-Member Attendance Policy

- Each committee gets one non-member ticketed event per term
- Tell your VP of Activities before event is posted, not after
- Members have the ability to sign up first
- Non-members will get a special code once turned public



Santa Barbara  
Newcomers Club

# Storage Locker



- [Link to Storage Unit Details](#)
- Budget U-Stor: 130 Garden Street, Unit #3
- Passcode : 1956
- Hours: M-F 8:30am-5:30pm, S/S 9am-5pm
- Make sure you return items ASAP!





# Wild Apricot Functions

1. Jotform
2. Manage Your Registration List
3. Email your registrants



# 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 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: \*

MM-DD-YYYY



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

Answer 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 per 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.

## TOTAL COST PER PERSON:

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

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

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:



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

**Browse Files**  
Drag and drop files here

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

You can upload up to 2 photos here.

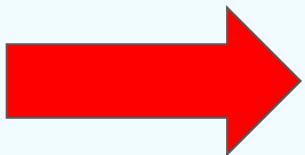
Upload Event Picture Here:



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.

January 2025

## 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? \*

All emails are selected by default

- 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

## 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 an 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.

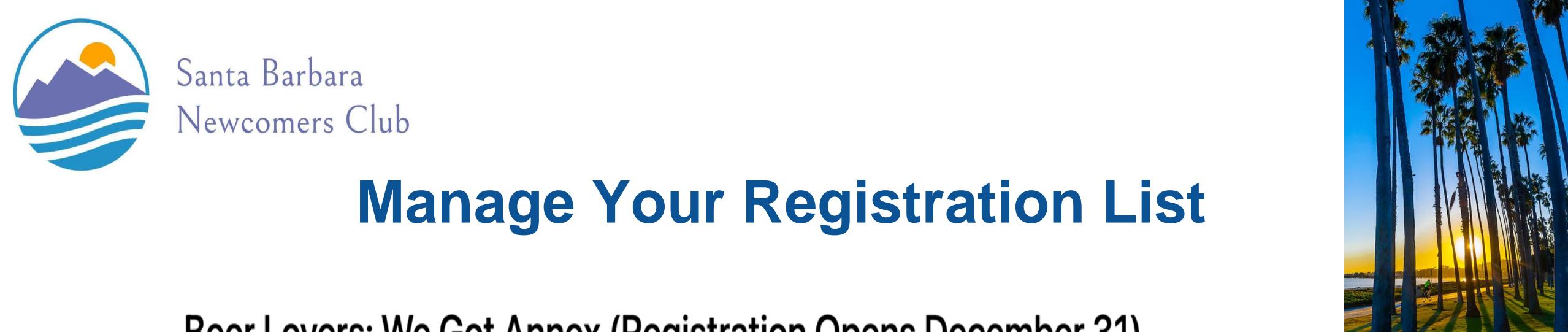


Santa Barbara  
Newcomers Club



# Wild Apricot Functions

1. Jotform
2. Manage Your Registration List
3. Email your registrants



Santa Barbara  
Newcomers Club

# Manage Your Registration List

## Beer Lovers: We Got Annex (Registration Opens December 31)

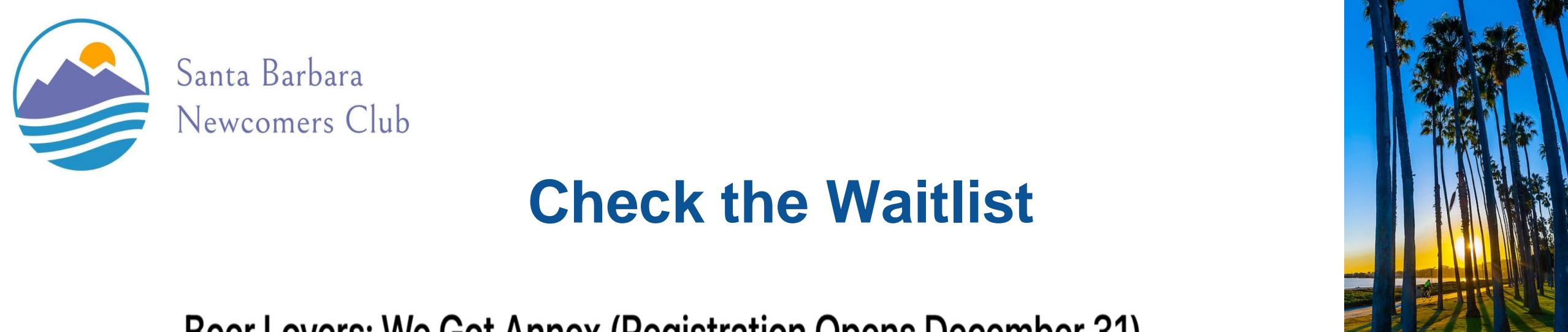
January 20, 2025, 6:00 PM – 9:00 PM @ Validation Ale Annex at 2840 De La Vina St, Santa Barbara CA 93105

Visible to [Restricted levels/groups](#)

Allow registration Registration is enabled.



Event details	Registration form	Ticket types & settings	Emails	Registrants & Invitees	Waitlist & settings
Basic information			Description		



Santa Barbara  
Newcomers Club

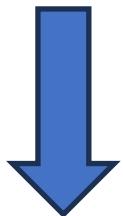
## Check the Waitlist

### Beer Lovers: We Got Annex (Registration Opens December 31)

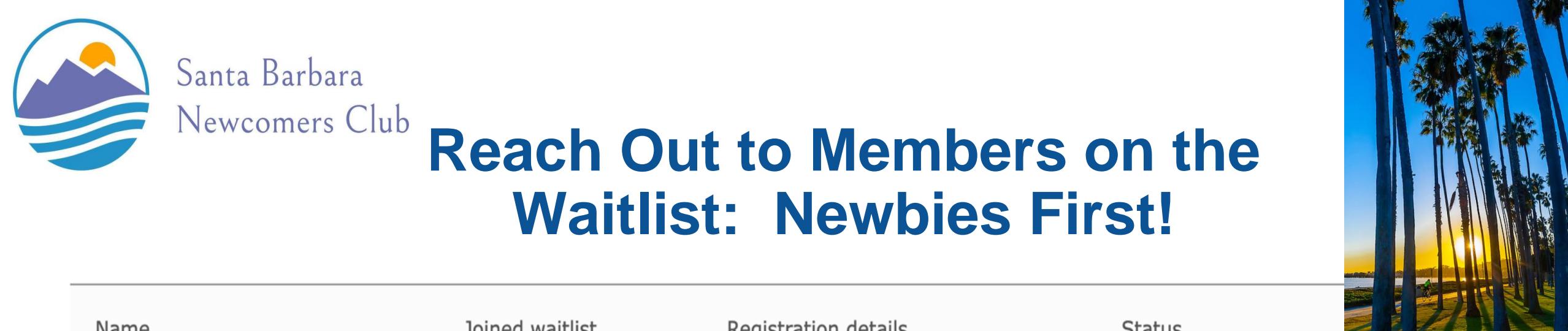
January 20, 2025, 6:00 PM – 9:00 PM @ Validation Ale Annex at 2840 De La Vina St, Santa Barbara CA 93105

Visible to [Restricted levels/groups](#)

Allow registration Registration is enabled.

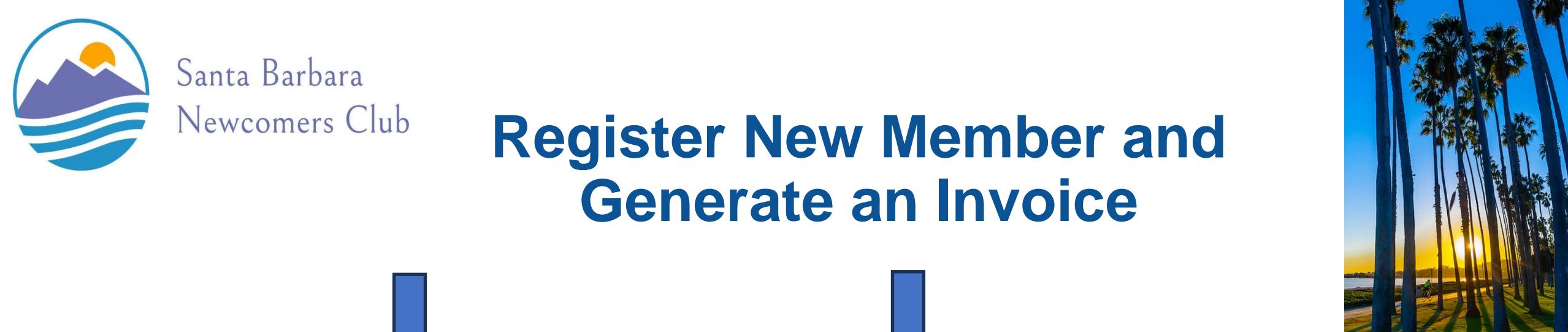


Event details	Registration form	Ticket types & settings	Emails	Registrants & Invitees	Waitlist & settings
Basic information			Description		



# Reach Out to Members on the Waitlist: Newbies First!

Name	Joined waitlist	Registration details	Status
Puma, Cathy	29 Dec 2024, 8:58 AM	Newcomers (including Extended Newcomer)	On waitlist
HOUSTON, MOLLY	31 Dec 2024, 4:29 PM	Newcomers (including Extended Newcomer)	On waitlist
Brakeman, Amy	14 Jan 2025, 8:52 PM	Newcomers (including Extended Newcomer)	On waitlist
Henry, Tom	14 Jan 2025, 8:53 PM	Newcomers (including Extended Newcomer)	On waitlist



Santa Barbara  
Newcomers Club

# Register New Member and Generate an Invoice



nt registration form

Share registration  Show registration on event registrants list

First name **Cathy**

Last name **Puma**

e-Mail [pumacathy@gmail.com](mailto:pumacathy@gmail.com)

Phone **2069090954**

Street Address **671 Winslow Way W.**

City **Bainbridge Island**

Zip Code **98110**

SBNC Event Waiver & Media Release  [SBNC Event Waiver & Media Release](#)

Organization

Prospect Contact Type



Waitlist registration details

Date joined **January 18, 2025, 4:25 PM**

Ticket type **Newcomers (including Extended Newcomers)**

Total amount **\$0.00**

Status **On waitlist**

[Register now](#)

[Send email](#)

Internal notes

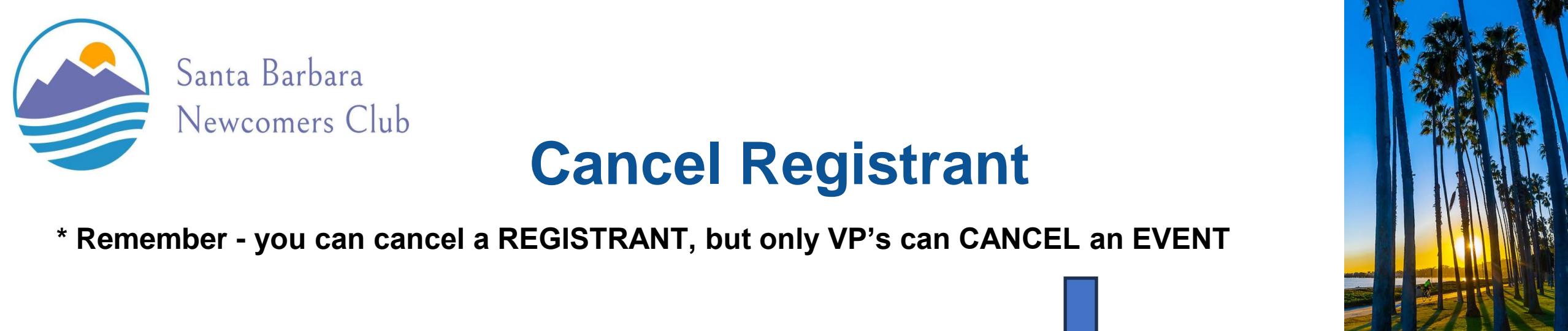


Santa Barbara  
Newcomers Club

# Find the Registrant Who Has to Cancel



Event details	Registration form	Ticket types & settings	Emails	Registrants & Invitees	Waitlist & settings
Filter	Sort by	Search		Records found: <b>13</b>	
All	Registrant name ▲▼				
Check in	Registrant Name, Email, Organization	Membership Status, Renewal due, Level	Registration Ticket type, Amount, Date, Invoice	Payment status	
<input checked="" type="checkbox"/>	<b>Appelman, Wade</b> wade@wadeapp.com	Active member 4 Jun 2025 NewcomerMember	Newcomers – \$24.00 17 Jan 2025, 7:28 AM Invoice #51065	Paid	
<input checked="" type="checkbox"/>	<b>Boyce, Richard</b> rboyce@erols.com	Active member 22 Feb 2025 ExtendedNewcomer	Working Committee – \$24.00 30 Dec 2024, 4:16 PM Invoice #50838	Paid	
<input checked="" type="checkbox"/>	<b>Faull, Jim</b> jefauill@gmail.com	Active member 10 Apr 2025 ExtendedNewcomer	Newcomers – \$24.00 5 Jan 2025, 9:26 AM Invoice #50871	Paid	



Santa Barbara  
Newcomers Club

# Cancel Registrant

\* Remember - you can cancel a REGISTRANT, but only VP's can CANCEL an EVENT

Event registration for [Beer Lovers: We Got Annex \(Registration Opens December 31\)](#)

Registration received from  
[Wade Appelman](#) (69520976, wade@wadeapp.com)

Event registration form

Edit

General



PAID

Cancel registration

Share registration  Show registration on event registrants list

Registration date January 17, 2025, 7:28 AM

First name Wade

Ticket type Newcomers

Last name Appelman

Total amount \$24.00 [Invoice #51065](#)

e-Mail [wade@wadeapp.com](mailto:wade@wadeapp.com)

Checkins  Wade Appelman

Phone 7814397480

Never updated

Street Address 1807 Lighthouse Way

Internal notes

City Santa Barbara

Zip Code 93109

SBNC Event Waiver & Media Release  [SBNC Event Waiver & Media Release](#)

Organization

Prospect Contact Type



Santa Barbara  
Newcomers Club

# Cancel Registrant



[Beer Lovers: We Got Annex \(Registration Opens\)](#)

**Cancel registration for Wade Appelman**

Invoice #51065 will be voided.  
Settled payment will be removed from invoice.

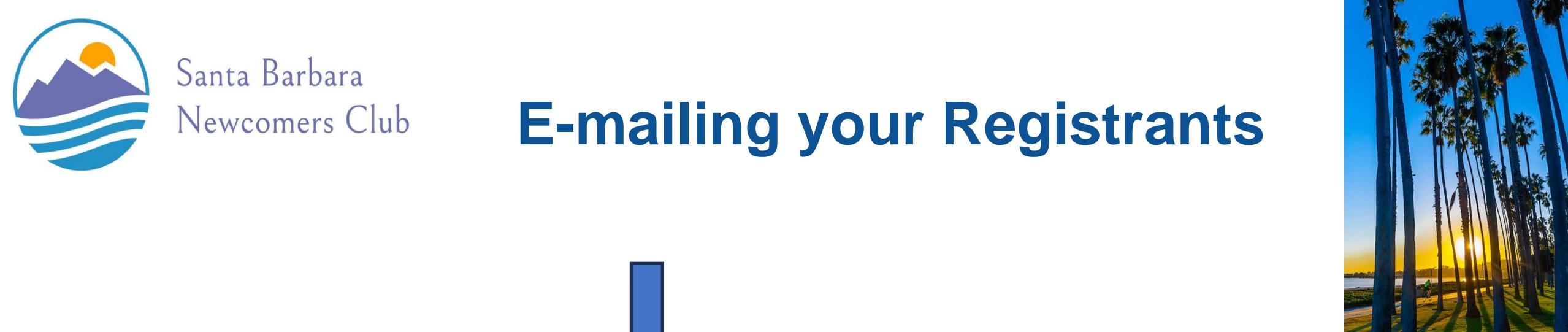
Reason for cancelling registration:

Jane Doe will replace Wade Appelman

**Cancel registration**   **Close**

In order for the person who is cancelling to be reimbursed, you must enter the full name of the person who will take their place **HERE** as the *“Reason for cancelling registration”*





Santa Barbara  
Newcomers Club

# E-mailing your Registrants

The screenshot shows the WildApricot software interface for managing events. On the left is a sidebar with icons for Account, Contacts, Events (which is highlighted in blue), Finances, and Communication. The main area has a dark header with 'Event list' and 'Event emails' tabs; 'Event emails' is selected. Below the header are several buttons: 'Edit', 'Add registrant', 'Email registrants' (which is highlighted in blue), 'Export registrants', 'Add to waitlist', 'Email waitlist', and 'Reports'. The main content area displays event details for 'Arts: Tour the Whimsical Art and Sculpture Collection of The F Museum (Registration Opens November 19)'. The event is scheduled for January 29, 2025, from 12:30 PM to 3:00 PM at a private home.



Santa Barbara  
Newcomers Club

# E-mailing your Registrants



5

Tab groups

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

Save ✓ Saved at 2:28 PM

## Select template

Saved Themed Basic

Blank eMail Template

Z - Event Reminders 1-3 ...

1 Membership 3rd Year denial le...

**Committee Chair Training**

**January 2025**

A large blue arrow points from the "Saved" tab to the first template card.

The first template card shows a simple design with the club logo and three horizontal lines for content.

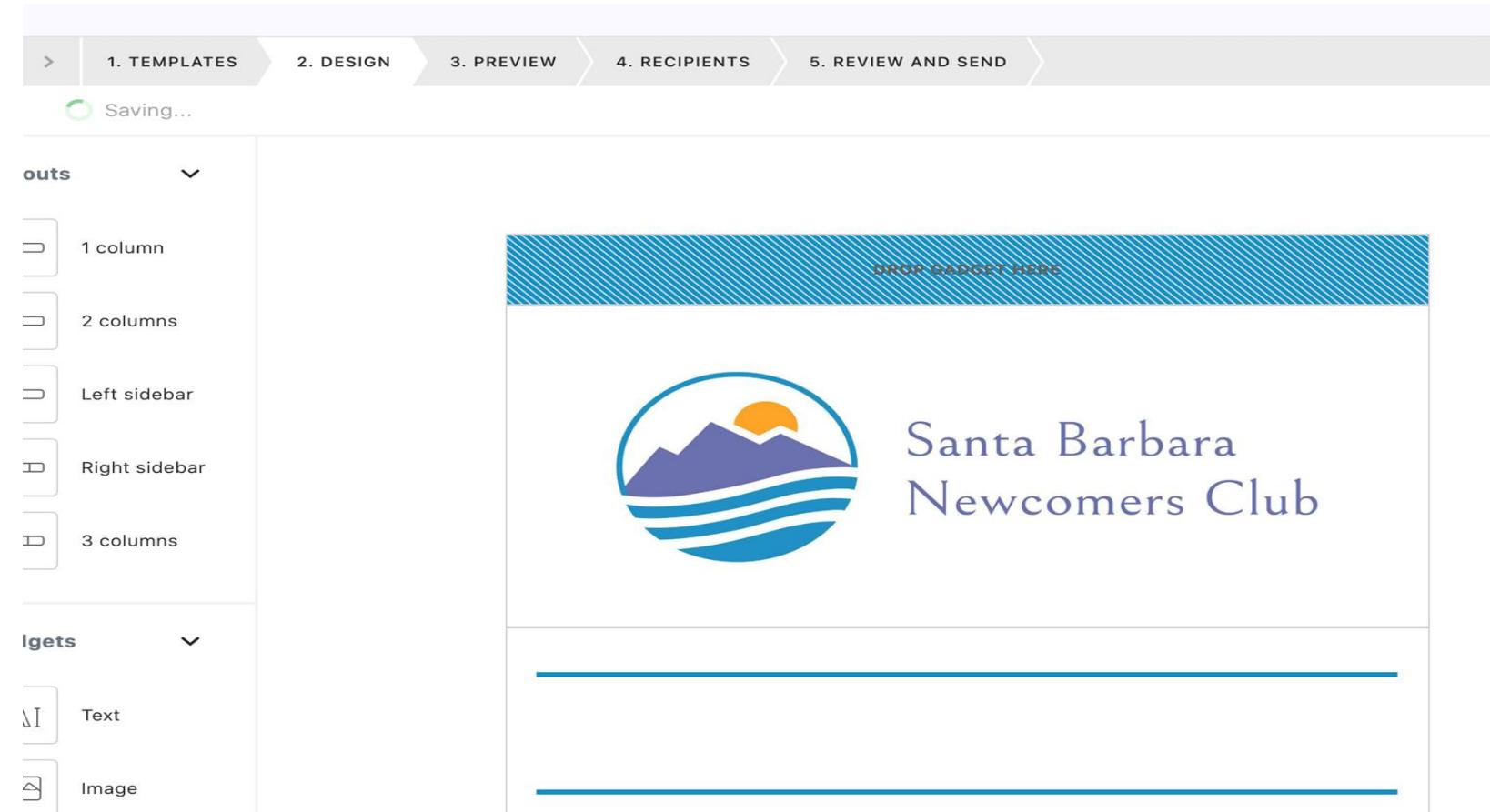
The second template card shows a more complex design with the club logo, a title "Event Reminder", and sample text: "Dear [Recipient\_First\_Name] ([Recipient\_Last\_Name]) You are currently registered for the following event: [Event\_Title] At the date of [Event\_Date]."

The third template card shows a design with the club logo and a title "A Message About Your Membership". It includes sample text: "Dear [Recipient\_First\_Name] ([Recipient\_Last\_Name]) We sincerely hope this email finds you well. As the Committee of Membership for the Santa Barbara Newcomers Club, we want to let you know about our third year denial letter."



Santa Barbara  
Newcomers Club

# E-mailing your Registrants



Fill in a title and the body of the email





Santa Barbara  
Newcomers Club

# E-mailing your Registrants



Save ✓ Saved at 2:28 PM

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

## Choose recipients and subject

Recipients: [Current event registrants](#)

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

Subject: [A Message from Santa Barbara Newcomers](#) ⓘ  
Type { to see available macros

Reply to: VP Activities BoardMember E [activities@sbnewcomers.org](mailto:activities@sbnewcomers.org) [Change reply to](#)

Tracking:  Enable link and open email tracking

**Change the subject line**

→

Committee Chair Training

January 2025



# Reimbursements



- Any member can submit a request for event reimbursement
- No more FAR ... no longer a chair responsibility to submit for entire committee
- First Time Only to access the “Bill.com Expense and Spend System”:
  - Request access by mailing: [expense@sbnewcomers.org](mailto:expense@sbnewcomers.org)
    - Name & email address is all that is required
  - Within 24 hours you will get a system email to set a password
  - Once logged on you will be prompted to enter the following: (this is information is encrypted by the site and not accessible by our club.. This is only done at sign-up)
    - Birthdate (this is mandatory by law)
    - Bank information (as your will get your reimbursement as a direct deposit)
- To see your account or request reimbursement
  - Login to website or on phone
  - Track payments and submit expenses

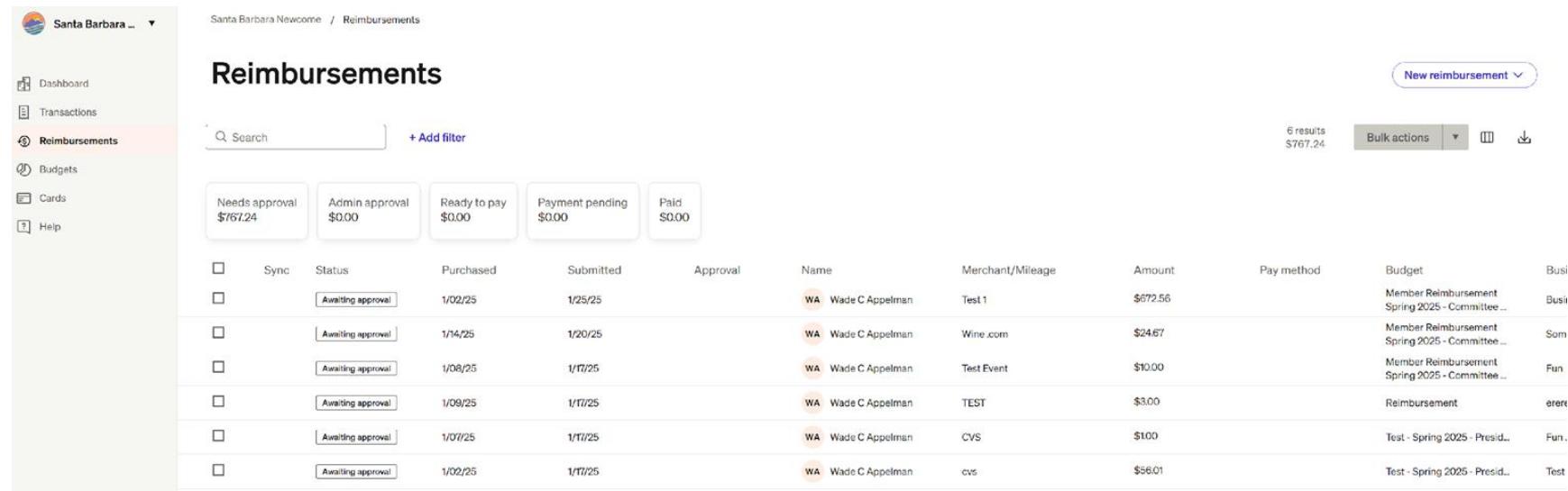


Santa Barbara  
Newcomers Club

**bill** SPEND & EXPENSE

- Login to site:  
<https://app.divvy.co/login>
  - Email address and password you set @ signup
- Phone App:
  - Search for “bill spend and expense”

# To Request Reimbursement (Browser Option)



The screenshot shows the 'Reimbursements' section of the bill platform. At the top, there are five status filters: 'Needs approval \$767.24', 'Admin approval \$0.00', 'Ready to pay \$0.00', 'Payment pending \$0.00', and 'Paid \$0.00'. Below these filters is a table listing six reimbursement requests. Each row includes a checkbox, sync status, purchase date, submitted date, approval status, name, merchant/mileage, amount, pay method, budget, and business category. The table has a header row and six data rows.

	Sync	Status	Purchased	Submitted	Approval	Name	Merchant/Mileage	Amount	Pay method	Budget	Busi
<input type="checkbox"/>	<span>Awaiting approval</span>	1/02/25	1/25/25			WA Wade C Appelman	Test1	\$672.56		Member Reimbursement Spring 2025 - Committee ..	Busi
<input type="checkbox"/>	<span>Awaiting approval</span>	1/14/25	1/20/25			WA Wade C Appelman	Wine.com	\$2467		Member Reimbursement Spring 2025 - Committee ..	Som
<input type="checkbox"/>	<span>Awaiting approval</span>	1/08/25	1/17/25			WA Wade C Appelman	Test Event	\$10.00		Member Reimbursement Spring 2025 - Committee ..	Fun
<input type="checkbox"/>	<span>Awaiting approval</span>	1/09/25	1/17/25			WA Wade C Appelman	TEST	\$3.00		Reimbursement	erent
<input type="checkbox"/>	<span>Awaiting approval</span>	1/07/25	1/17/25			WA Wade C Appelman	CVS	\$100		Test - Spring 2025 - Presid..	Fun..
<input type="checkbox"/>	<span>Awaiting approval</span>	1/02/25	1/17/25			WA Wade C Appelman	cvs	\$56.01		Test - Spring 2025 - Presid..	Test





- Combine all of your receipts for one event on a single submission
- Merchant:
  - Can be all on one line (CVS, Costco, Total Wines)
- Reimbursement amount:
  - Total of all your receipts for that event
- Transaction Date:
  - Date of your event
- Budget:
  - Select “Member Reimbursement”
- Business Purpose:
  - Description of items purchased (“wine for Presidents party & cheese board”)
- Receipts
  - Add all receipts which show total amount from all vendors
- Committee Name:
  - Select the committee the event is sponsored by
- Event Date:
  - Date of your event
- Event Name:
  - What was the event called

# Reimbursement Screen

## New reimbursement

Out of pocket

Details

Merchant\*

Enter merchant name

Reimbursement amount\*

\$0.00

Transaction date\*

Date of transaction

Reimbursement total: \$0.00

Funds will be deposited to bank account \*\*\* 69 · [Change](#)  
Once approved, this can take 5 - 8 business days

Don't forget to add  
mandatory receipts

Required fields

Budget\*

Business purpose\*

Receipts\*

Required for Member Reimbursement (3)\*

\* Committee Name  
  
Name of the Committee

\* Event Date  
  
Date the event was held - (i.e. Jan 10, 2025) (Then press + Create New Value below)

\* Event Name  
  
Enter Name of the event - (i.e. 80's Dance Party) (Then press + Create New Value below)

[Request](#)





Santa Barbara  
Newcomers Club

# Phone App

- Search on App Store for “Bill Spend & Expense”
- Login (after getting your password)
- Submit by taking a picture of your receipt

The screenshot shows the homepage of the Bill Spend & Expense website. At the top, there is a navigation bar with links for AP & AR, Spend & Expense, Accounting Firms, Solutions, Resources, Company, and Pricing. There are also 'Login' and 'Get Started' buttons. Below the navigation, the text 'The BILL Spend & Expense App' is displayed, followed by a subtitle: 'Manage budgets, expenses, and more from the palm of your hand—all for free. Download from your favorite app store, or request a demo to see the full platform in action.' Two download buttons are shown: 'GET IT ON Google play' and 'Available on the App Store'. Below these buttons is a large image of a smartphone displaying the Bill app's user interface. The phone screen shows a receipt being processed, with the text 'Good morning Michelangelo' and 'PRINTED' visible. The app's logo, 'bill SPEND & EXPENSE', is prominently displayed at the top of the phone screen. The main interface of the app shows various expense categories like 'Food', 'Gasoline', 'Entertainment', and 'Transportation'. A sidebar on the right includes sections for 'To-do list', 'Adding information to 3 transactions', 'Approve 1 update', and 'Logout'.

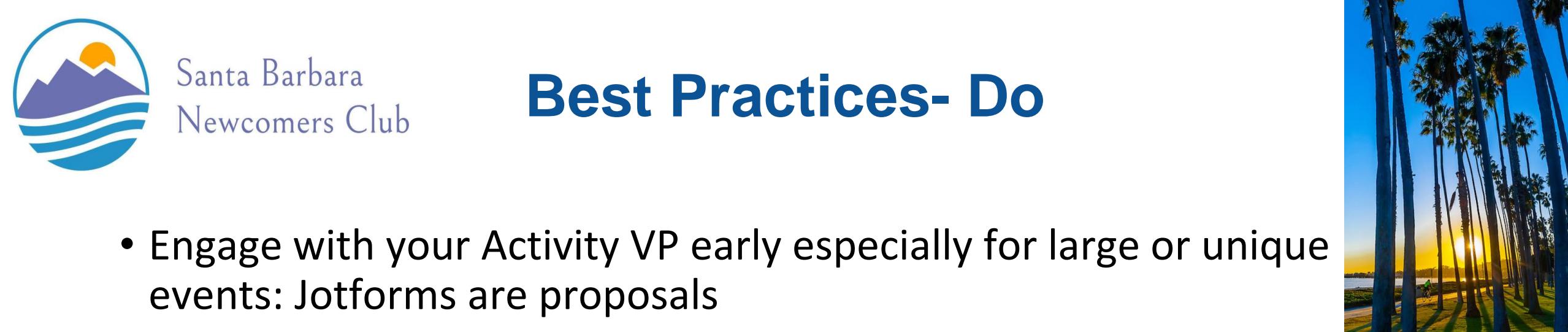




# A Few Reminders



- Setup your access ASAP if you expect to have expenses
- Download the phone app as option
- Let others on your committee know to setup an account too if they will have expenses this term
- You will see something about credit cards. This is DISABLED
- Once approved, transfers will occur in 24-48 hours. Check your dashboard for status
- Questions: email [expense@sbnewcomers.org](mailto:expense@sbnewcomers.org)



## Best Practices- Do

- Engage with your Activity VP early especially for large or unique events: Jotforms are proposals
- Sign up for events you will be attending with your personal (not Admin) credentials
- Know the Club's Bylaws, Policies & Procedures, and Chair Guidelines
- Remember club members cannot be paid or profit from SBNC events
- Encourage your committee members to tip their servers well
- Read all Club communication such as: E-News, President's letter, Board Packets, etc.
- Do offer events in a variety of price ranges



Santa Barbara  
Newcomers Club

# Best Practices- Don't



- Submit a JotForm after the deadline and expect to see your event posted the same week.
- Feel the need to include us in every email.
- Tweak your event after it is posted. All you do in WA is manage the waitlist, email registrants and print nametags.
- Cancel an event yourself- let your Activities VP do it.
- Promote businesses or raise funds for any organizations. All events need to have an educational, service, or entertainment component for our members.
- Forget to give newbies special focus and attention



Santa Barbara  
Newcomers Club

# Board Meeting Dates Spring Term 2025

**The 3<sup>rd</sup> Monday of the month 5:00 pm - 6:30 pm**



- Tuesday February 18, 2025 (Women's Club)
- Monday March 17, 2025 (Hayes Hall 1740 Cliff Drive)
- Monday, April 21, 2025
- Monday, May 19, 2025
- Monday, June 16, 2025
- Monday, July 21, 2025
- Monday August 18, 2025



Santa Barbara  
Newcomers Club

## **Let's Explore Wild Apricot**

Email: [caroblockisland@aol.com](mailto:caroblockisland@aol.com)

Password: IloveSBNC2025!



SSID:Compass Guest

PW: findyourhome



# Thank you!!

Carolyn O'Mara  
[cbmblb@outlook.com](mailto:cbmblb@outlook.com)  
(917) 355-6633

Jenifer Beatty  
[jeniferbeatty1@gmail.com](mailto:jeniferbeatty1@gmail.com)  
(916) 747-7971