# SBB End User Guide (PDF)

## SBB/Wild Apricot Introduction

This is our new website. We are now on the Wild Apricot membership software platform.  This guide has been customized for SBB. Revisions will be released when we add new functionality. You will receive support from SBB volunteers and Wild Apricot.

Some graphics and screen shots are not taken from the SBB customized site and may look different. However, the instructions are the same.

 From the SBB/Wild Apricot site, you can view member-only content and sign up for activities, monthly socials and events. You can also perform self-service functions such as updating your profile, paying invoices, and renewing your membership. This guide will help you get started, show you how to manage your membership, and introduce you to some of the functionality that appears on the SBB/Wild Apricot site.

### Topics covered in this guide:

| | | |
|---|---|---|
| **Logging In** | **Privacy Settings** | **Using Sign Up Links** |
| **Changing Your Password** | **Renewing Your Membership** | **Contact Us** |
| **Updating Your Profile** | **Viewing Invoices/Payments** | |

## Logging in

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

Also, check your personal email *Inbox* for the welcome email that was sent to you **when you joined as a new member or if you are a current member transitioning to this site.** The welcome email contains the instructions for your FIRST TIME LOGIN. After you have your password set up, you will use the following instructions.

***Please note:*** on your first login, you will also be required to accept **Wild Apricot's** terms of use before proceeding.



With our SBB/Wild Apricot site, click the **Login** link that leads to log in boxes (user name/password). It is located in the upper right hand corner….



... or enter through a link on the homepage (bottom right column) that takes you to the log in boxes.
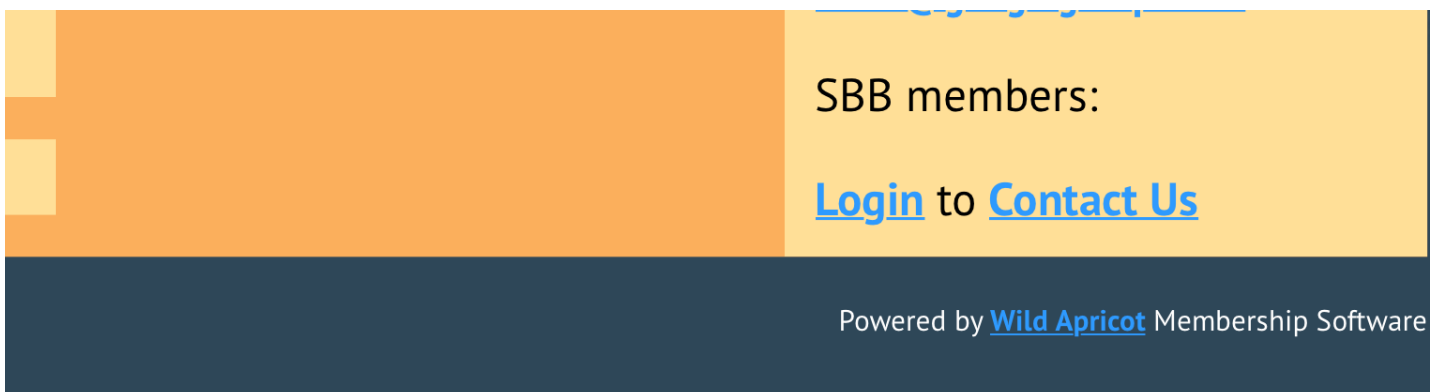
In the log in fields, you will enter your SBB/Wild Apricot credentials – *your email and password* – then click the **Login** button. If you do not remember your password, click the **Forgot password** link next to the **Login** button. On the page that appears, you can enter your email address to receive a reset password link via email.

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.
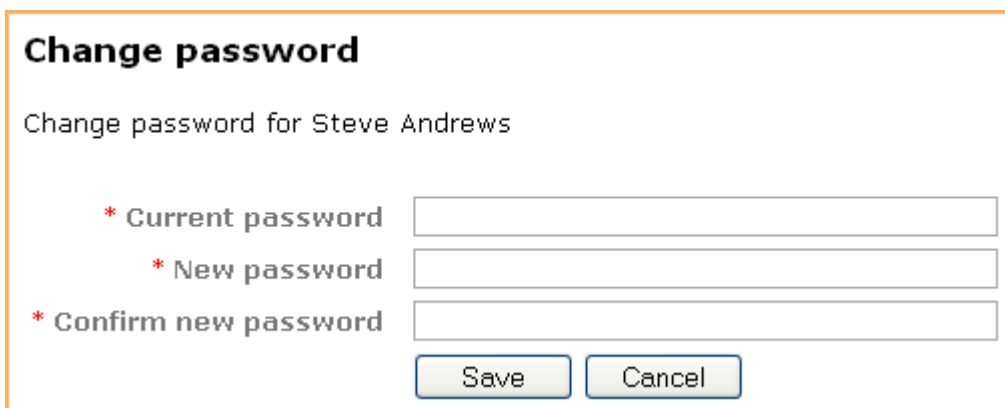
Balance due: **$80.00**

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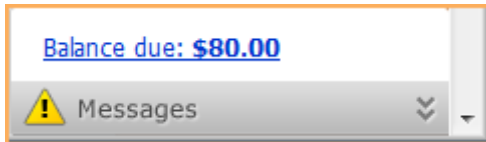
You can click any of these links to resolve the corresponding issue.

## Changing your password

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

Steve Andrews    Change password    Log out
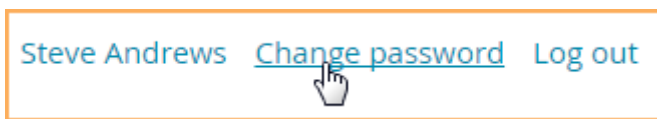
On the screen that appears, you enter your current password, then the new password, and the new password again for confirmation.

**Change password**

Change password for Steve Andrews

\* Current password

\* New password

\* Confirm new password

Save    Cancel

Password requirements:

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

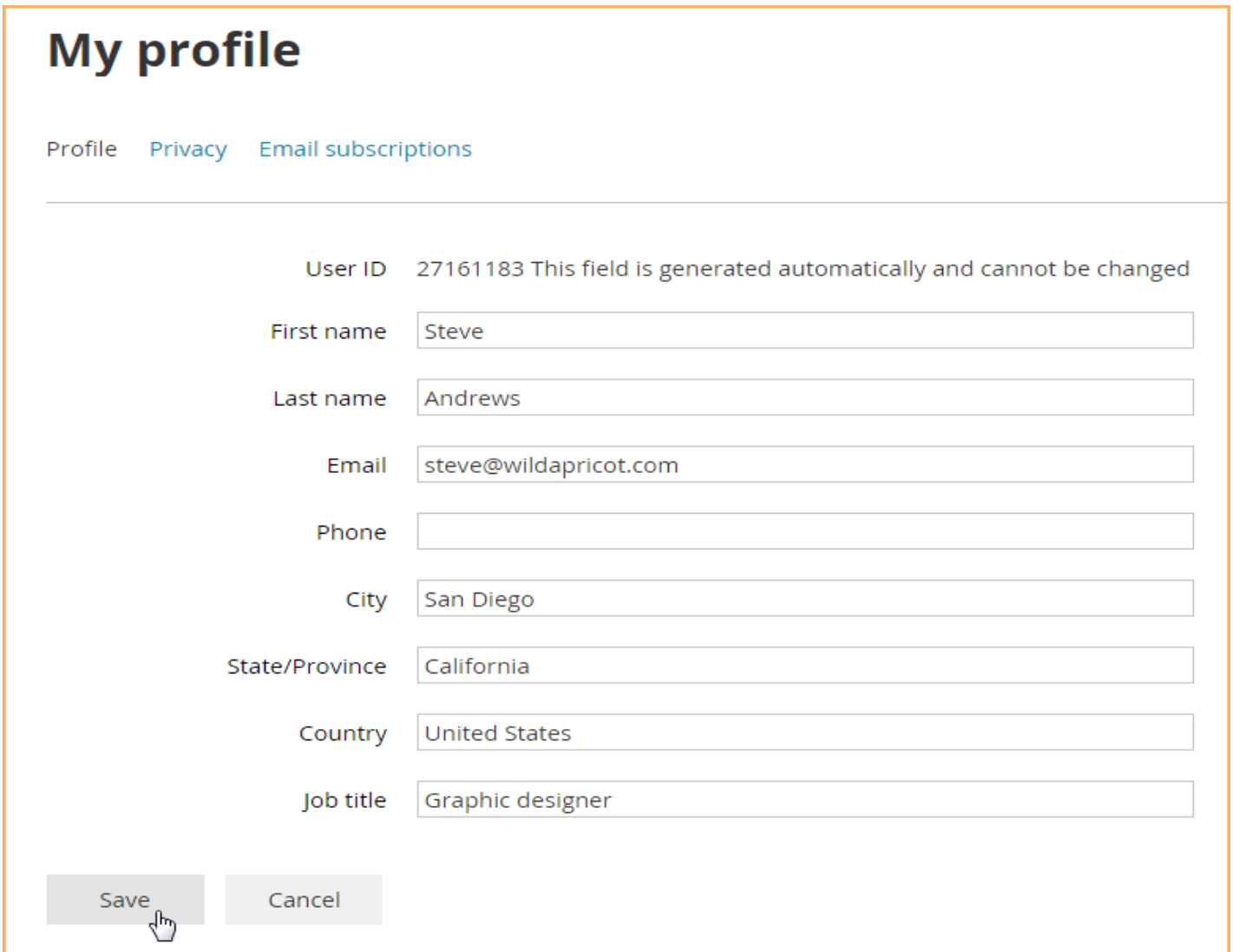SBB/Wild Apricot passwords are case sensitive.

# Updating your profile

You update your personal information from your member profile and control information and preferences.

Once you are logged into your SBB/Wild Apricot account, a link will appear to your member profile. The link will appear as your name.
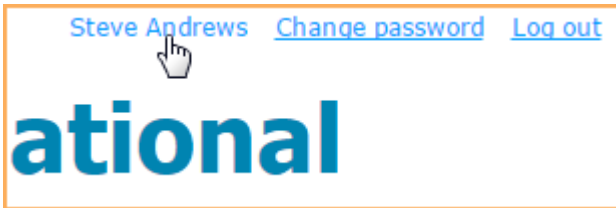


From the **My profile** screen that appears, click the **Edit profile** button to update your personal information.



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

# Privacy Settings

SBB Bylaws protect personal information.  Therefore, all settings have been locked and no member information can be shared.  You cannot change them.

# 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.
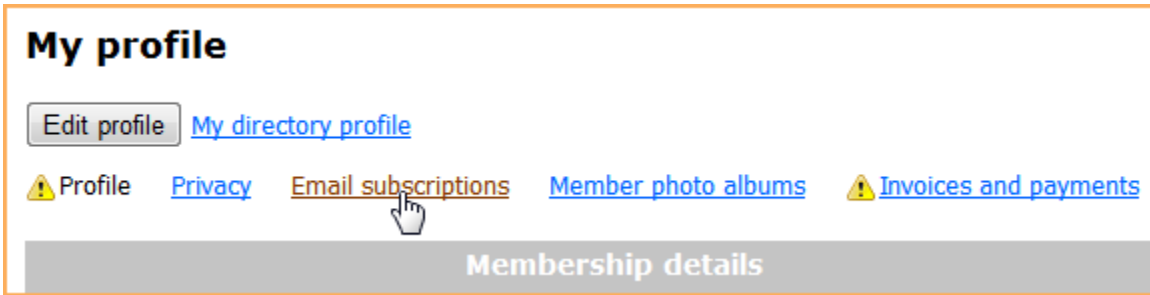


You can now check or uncheck the kinds of emails you want to receive.
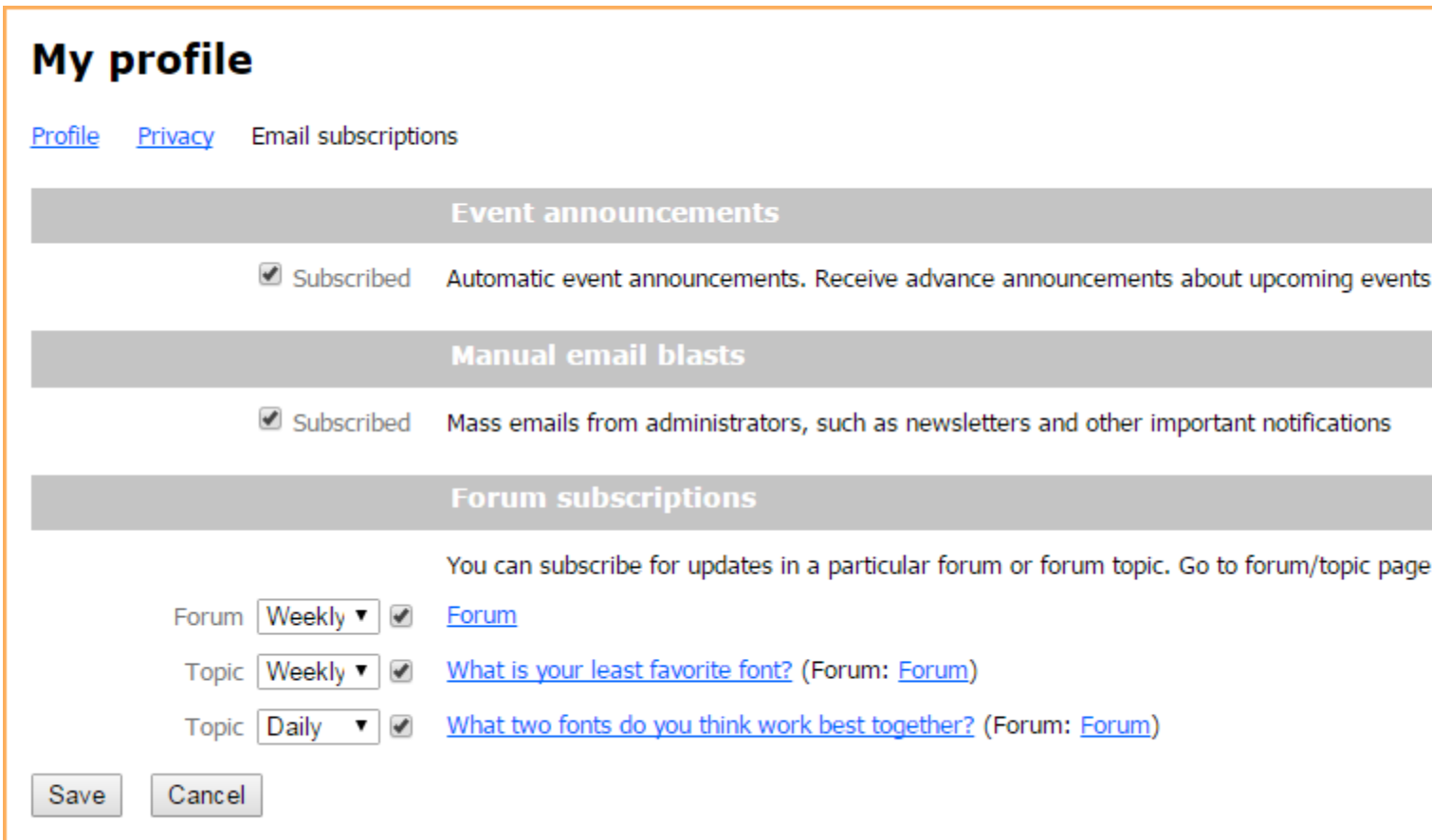
There are three types of emails that can be controlled:

- **Event notifications** – automatic event emails such as event announcements (sent to people not yet registered) and event reminders (sent to registered attendees only). This is not yet active.
- **\*\*\*Manual email blasts** – email blasts sent by site administrators ( how we notify the entire SBB membership of upcoming activities, socials, events and important announcements).
- **Forum subscriptions** – currently there are no Forums on the SBB/Wild Apricot site.

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.

A membership renewal notice will be automatically emailed to you before your membership renewal date. Within the renewal notice, you can click the link to log into your SBB/Wild Apricot account. You will receive multiple reminder emails at different intervals prior to your renewal date.
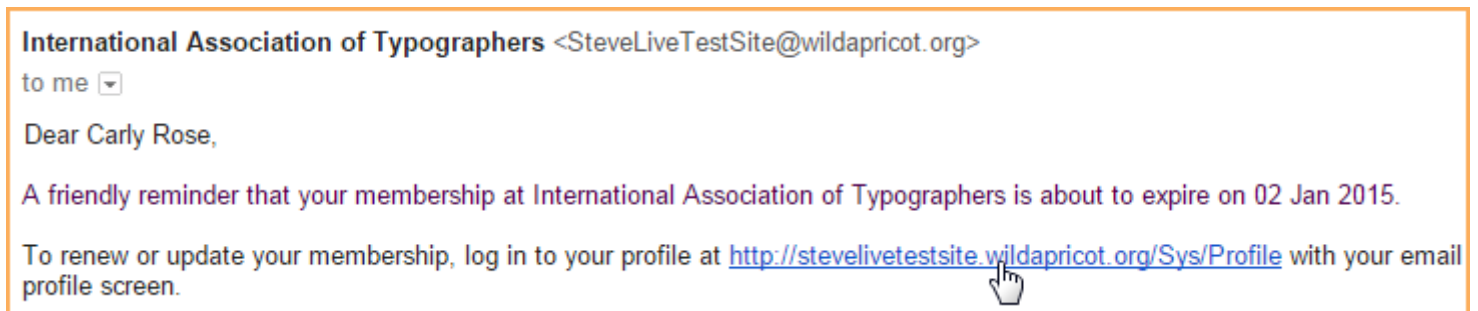


You can also renew your membership from your member profile on the SBB/Wild Apricot site.  To view your member profile, log into the SBB/Wild Apricot site and click the link to your member profile. The link will appear as your name.
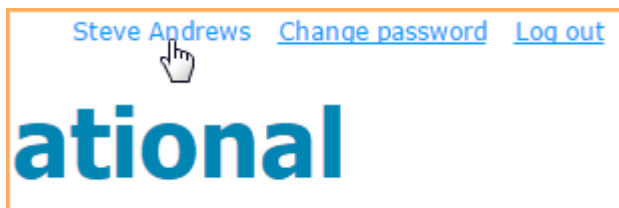


To renew your membership from your member profile, click the **Renew** button on your **Profile** page.

## Membership details

| | |
|---|---|
| *Membership level* | **Member - $10.00 (USD)**<br>Subscription period: 1 year<br>No recurring payments |
| *Membership status* | **Active** |
| *Member since* | 07/02/2016 |
| *Renewal due on* | 07/03/2018 |

**Renew until 07/03/2019**

SBB members can renew their membership for a one year period and within 3 months of the renewal expiration date. A notice informing you of the next possible renewal date may appear in place of the **Renew** button.

## Membership details

| | |
|---|---|
| Membership level | **Bronze - $10.00 (USD)**<br>*Subscription period: 1 year*<br>*No recurring payments* |
| Membership status | **Active** |
| Member since | 25 Nov 2014 |
| Renewal due on | 24 Nov 2015<br>You can renew starting 25 Oct 2015 |

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 **Pay online** button to confirm the

renewal request.  You will be taken to the **PayPal** page where you can pay (Credit Card or PayPal Account) for the renewal invoice.

## Membership renewal

**Review and confirm**

| | |
|---|---|
| Renewal until | 07/03/2019 |
| | Member - $10.00 (USD) |
| | Subscription period: 1 year |
| | No recurring payments |
| Current status | Active |
| Total amount | **$10.00 (USD)** |

Cancel                   Back    Pay online

**Your profile**

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iPad 🛜              2:03 PM              * 53% 🔋

<   >   📖   🔒 PayPal, Inc.

Singles Baby Boomers

**P PayPal**      🛒 **$20.00 USD** ⌄

Pay with PayPal      English ⌄

Email

Password

☐ Stay logged in for faster checkout ?

For your security, we'll always ask you to log in to update your PayPal personal or financial info.

**Log In**

Having trouble logging in?

or

**Pay with Debit or Credit Card**

New. Faster. Easier.

Welcome to the new PayPal checkout! The security you rely on – now even faster. It's everything checkout should be.

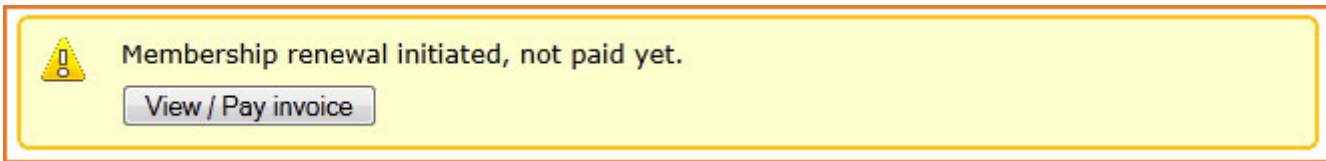Cancel and return to Singles Baby Boomers     Policies  Terms  Privacy  © 1999 - 2016 🔒

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

Balance due: **$60.00**

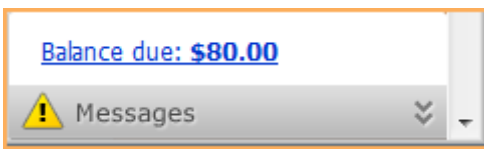Membership is expired

⚠ Messages       ≫

and a message will be displayed on your member profile:



# Viewing invoices and making payments

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



To view or pay the outstanding invoice, click the link. You will be taken to the **Invoices and payment** tab in 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.
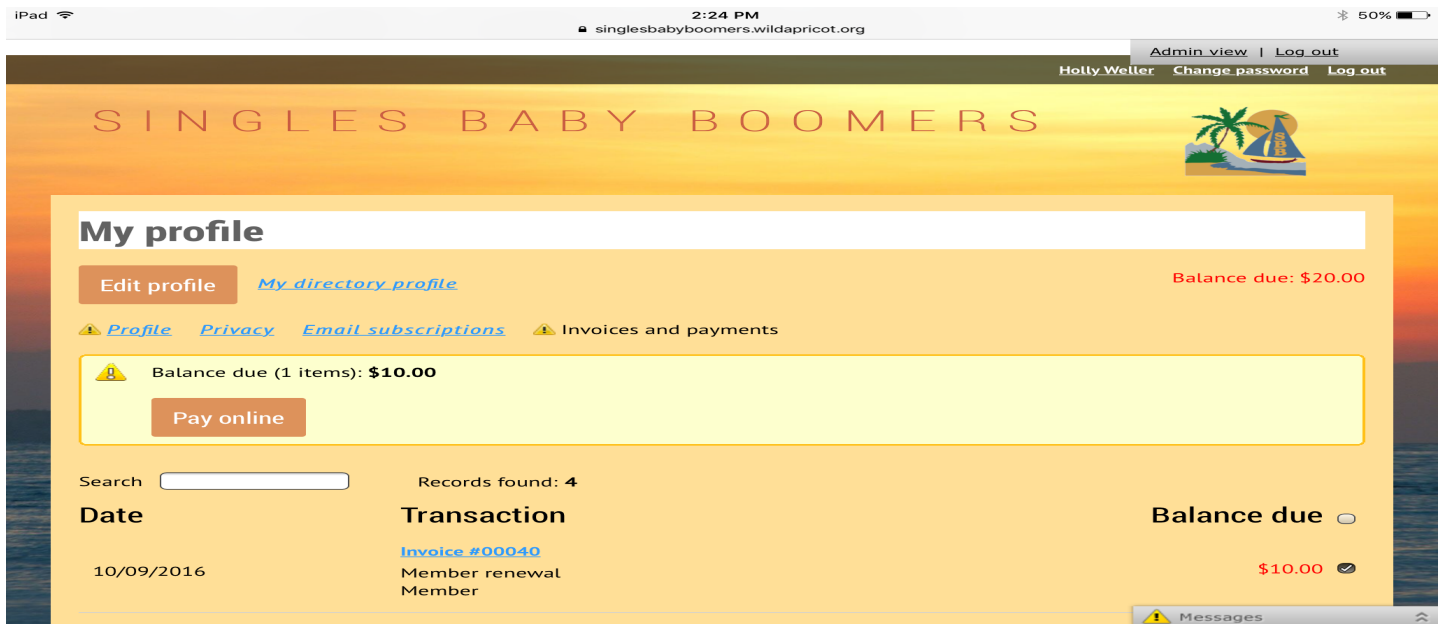


Invoices with open balances (unpaid or partially paid) will be shown at the top of the screen.

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 the PayPal online payment screen where you will enter your credit card or PayPal account details.  Note: SBB only accepts online payments. We do not accept payments at socials or events.
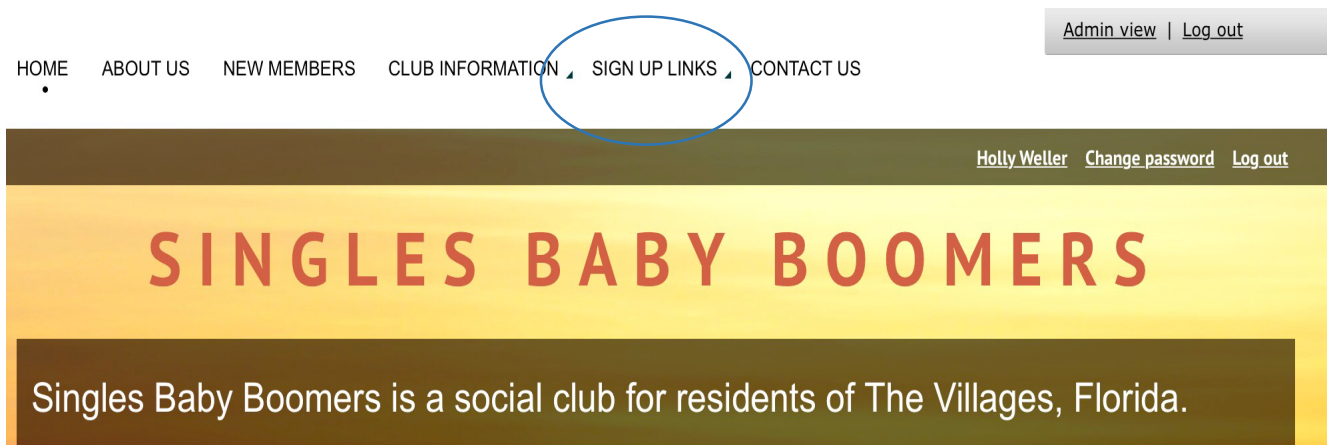
# Using Sign Up Links for Activities, Socials and Party Time

SBB is implementing functionality from the Wild Apricot membership software platform using a 3 phase plan.

Currently, members can sign up using the familiar method of Google forms, sheets and PayPal for many activities, socials and parties on the SBB/Wild Apricot site.

You will need to follow the instructions in member distributed emails for activities that do not have a site link. Check your personal email *Inbox* and your Spam/Junk folders.

Go to the navigation bar on your device to use **Sign Up Links**. You must be logged into the site. On a mobile device, it will be a drop down bar.
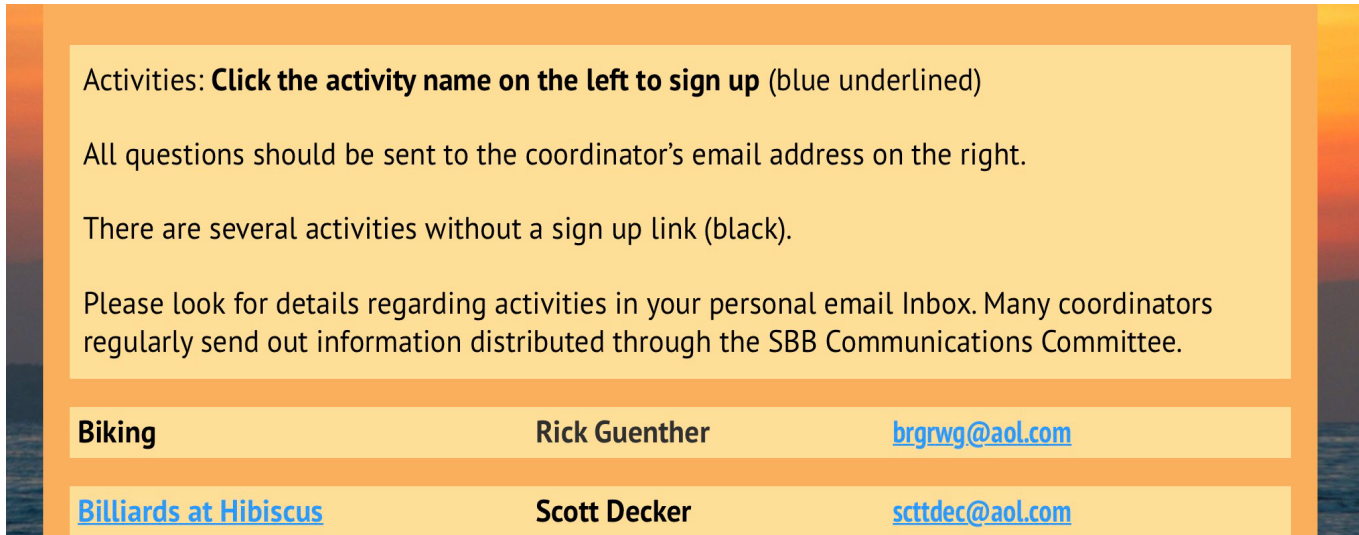


When you click on the Sign Up Links, it shows the Activities, Socials and Party Time tabs. Click the one you want to use.
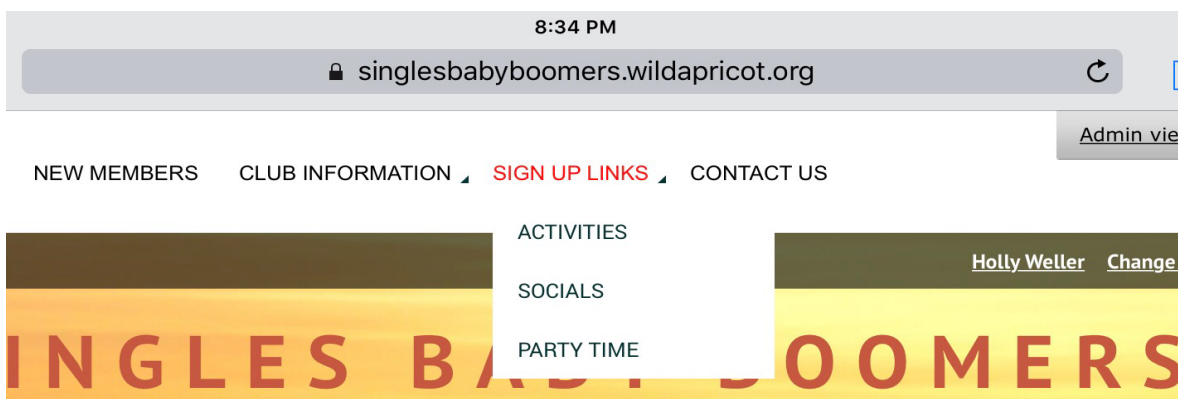
For activities with a sign up link, you can click on the left hand column (activity: **blue underlined**) and it takes you to the sign up form or sheets.

The activity names in **black** do not have a link and you must follow the instructions from the coordinator's emails to the membership for any details. The name of the coordinator and their email address is also displayed.

Activities: **Click the activity name on the left to sign up** (blue underlined)

All questions should be sent to the coordinator's email address on the right.

There are several activities without a sign up link (black).

Please look for details regarding activities in your personal email Inbox. Many coordinators regularly send out information distributed through the SBB Communications Committee.

| Biking | Rick Guenther | brgrwg@aol.com |
|---|---|---|
| Billiards at Hibiscus | Scott Decker | scttdec@aol.com |

Monthly Socials will display detailed information regarding the upcoming date with instructions to sign up. If you need to pay for the social, you will be taken to the PayPal screen for online payment with a credit card or PayPal account.

All Party Time Events will require payment online through PayPal. Details and instructions on the upcoming party will be displayed.

Note: SBB only accepts online payments. We do not accept payments at socials or events.

It is recommended, if you are using a mobile device [ a tablet (iPad) or smartphone (Android or iOS)] that you download Google Sheets.

Navigation on these devices may look different with a drop down menu on the upper left side of the screen.

## Contact Us

Go to the navigation bar on your device to use **Contact Us**. Contact Us also has a link from the bottom right column of the homepage. You must be logged into the site.

Navigation on mobile devices (phones/tablets) may look different with a drop down menu on the upper left side of the screen.

If you have a question regarding any of the following, click the **blue underlined** link:

| Membership | Social committee |
|---|---|
| Party Time Events | Emails |
| Website | General Questions |