



CampusGroups Community Management System

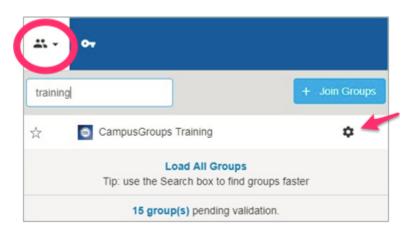
Get Started Officer Guide

www.campusgroups.com



1. Manage your Group

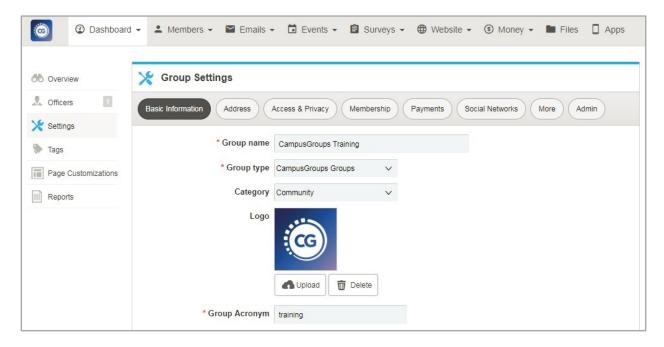
- 1. Log on to the CampusGroups platform.
- 2. Upon logging in, select your group from the "Groups" drop-down and click on the "Manage" button next to the group of which you are an officer that you need to manage.





2. Change your Group Settings

To update the groups' settings, click on the "Dashboard" menu and then click on "Settings".



Basic Information

- **Mission:** Enter your group's mission statement in plain text only.
- What we do: Enter what your group does in plain text only (optional).
- Close membership: If you select "Yes", it will prevent people from joining your group.

Contact

- **Group Email:** If your group has a pre-existing email, enter that email address here.
- **Website:** If you have a group website, enter it here otherwise the group website will default to the system's website.



Access & Privacy

- **Signup secret word:** Turn "regular sign-up" into "Invitation-only sign-up". Entering a password here will prevent people from signing up if they don't know that password.
- **Members can see each other:** Decide whether or not members should be visible to each other.
- **Membership should be private:** Decide whether or not members should have this group listed on their profile under groups.

Payments

- Turn off payments: If your group does not collect payments, select "No".
- Use school's central PayPal account: This is only accessible to administrators. If your group does not have a Payment Gateway setup (i.e. PayPal, Payflow, WePay, etc), the setting will be set to "Yes".
- PayPal account: A central PayPal account has been set up at your school. Enter your group's PayPal account here to get your dues paid directly to you instead.

Membership

- **Membership privacy:** You can click on "Access Rights" to set up which users can join your group.
- **Signup instruction:** If you have specific signup instructions, enter them here.
- **Member email restriction:** If you want to restrict membership based on email domain address, set it up here.
- **Parent group restriction:** If your group is a child of a parent group, you can restrict the permission for membership here.
- **Auto validation:** Set your member validation preferences. By default, new members are not validated when they join (you have to manually validate them into your group). However, you can choose to have them automatically validated when they sign up with a school email address, or choose to have all new members validated automatically (not recommended).

Your group can have a maximum of six different types of membership fees.

- **Membership Fee (1-6):** Enter only whole numbers without the currency symbol (e.g. 30)
- Caption: This is the label associated with this fee (e.g.: First Year Student, Second Year Student)
- **Restriction:** If the membership fee will be restricted only to a particular group of people, set that by clicking on "Access rights" (e.g.: Only Full-Time or Part-Time students can join.)
- **Duration:** Select the duration for the membership fee type.



More

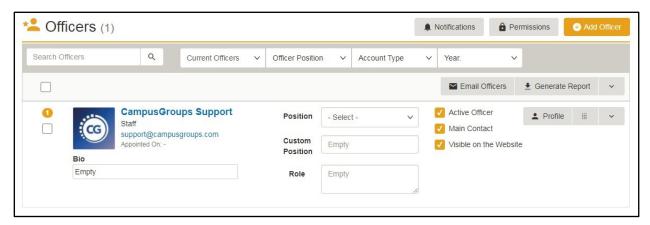
• Automatic welcome message: If you have created an email template to be sent to new members who join your group, click on the drop down and select it from the list. If you do not have a template, click on "Email templates" to set one up.

Once you have changed your settings, click on "Save".

3. Manage your Officers

List of officers

From the "Dashboard" module, click on the "Officers" menu on the left side of the screen. You should see the list of your officers.



- If you need to update the officer's position, click on the **position** dropdown and select from a pre-defined list or enter a custom position under the 'Custom Position' field.
- Check off the checkboxes you deem necessary for 'active officer', 'main contact', or 'visible on the website'.
- If you would like to provide a brief Role and Bio, fill in the text area. This will be displayed on the website.

Add an officer

You can add an officer from this page by clicking on "Add Officer" button.

Remove an officer

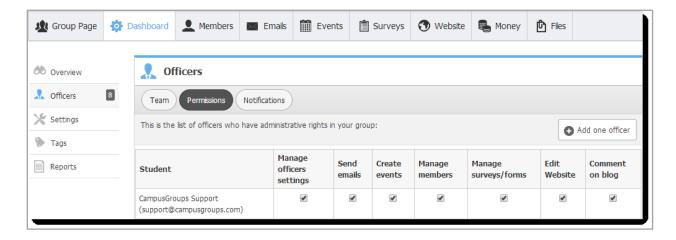
To remove an officer, uncheck the "Active officer" checkbox.



Manage permissions

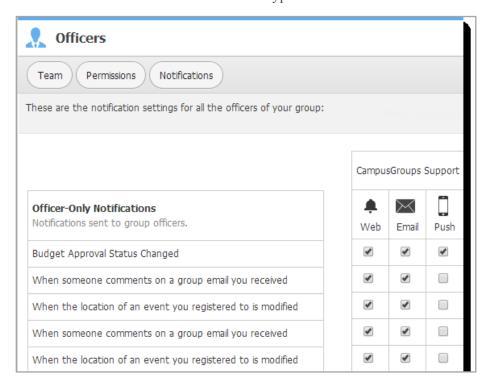
To set the permissions for each officer of your group, click on "Permissions".

Check off the appropriate privileges for the officers.



Manage notifications

Click on "Notifications" to select what types of notifications each officer should receive.

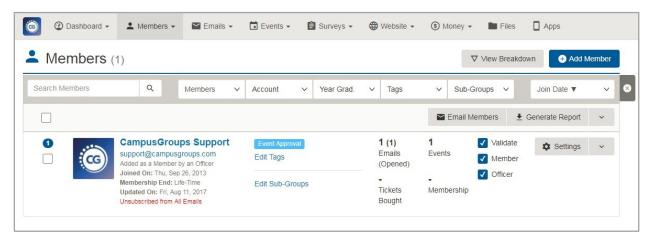




4. Manage your Members

List of Members

To manage your members or contacts, click on "Members".



Current members / Past members

There are two high-level membership types, Current Members and Past Members. Current members are active members of your group. Past members are members whose membership end date has expired. And those under Contacts are non-paying individuals who may have signed up for events you sponsored or those you have added in as contacts for networking purposes.

Members pending validation

By default, when students join a club, they are not automatically members of your club until you have validated their membership. To do so, click the link under the "Members pending validation" section. Then validate their membership. This will send a Welcome email to notify the student he is now a member of your group.



How to customize the Welcome email sent to new members?

- 1. Manage your group.
- 2. Mouse over the "Emails" menu and click on "Email templates".
- 3. We created several templates that you can duplicate and edit. Feel free to add your group logo, a header, etc. Customize the template you wish to use for the Welcome email.
- 4. Click on "Save".
- 5. Mouse over "Dashboard" on the menu bar and then click "Settings".
- 6. Go to the "More" tab and select your email template in the "Automatic welcome message" field.
- 7. Click on "Save".

Prospects pending validation

Prospects on the other hand are individuals who registered to be a member but have not yet paid their membership. If you have any of those, you can reach out to them to complete their transaction. Contacts can be added as members or as non-members for networking purposes.

Add Members

To add members, you can do so from this page by clicking on "Add Member".



If the person does not show up, click on "please click here if you can't find the person you're looking for in the textbox above" and add the member manually.

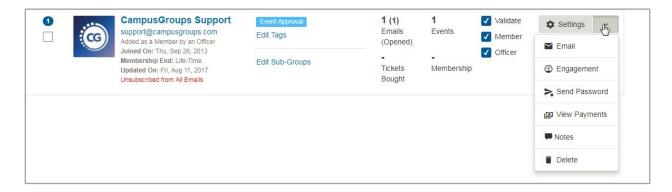
Please note this will add the person as a member of your group, and it will only create an account for him/her if he/she does not have a CampusGroups account. It won't create duplicate accounts.

You can import a list of contacts you wish to email or add multiple members at once to your group by uploading a list of students under the "Import members" section.



Delete members

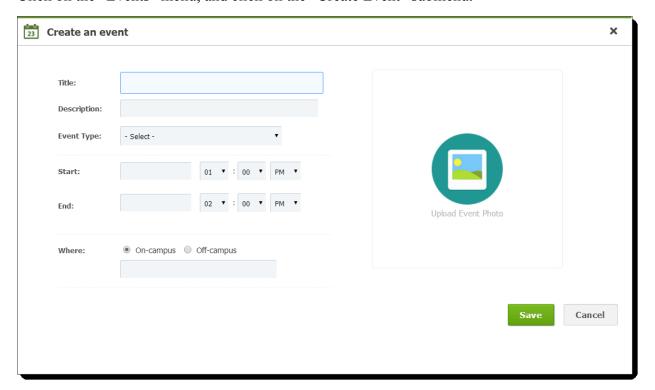
To remove a member, click on the member's dropdown and click 'Delete'.



5. Events

Create an event

Click on the "Events" menu, and click on the "Create Event" submenu.





- **Title:** Enter the name of your event.
- **Description:** Enter a short description for your event which will be displayed on the homepage.
- Event Type: Click on the drop-down and select the type of event you will host (e.g., Academic, Career Workshop, Athletic/Sports, Dinner/Gala, Trek, etc.)
- **Start:** Enter the start date for your event.
- **End:** Enter the end date for your event.
- **Upload Event Photo:** If you would like to upload an image to add to your event page, click "Upload Event Photo". You can choose from images that have already been uploaded ("Choose from Photos..."), or upload a new image ("Upload Photo..."). (Maximum file size should not exceed 4MB, and file types can be .jpg, .png, or .gif)

Once you have set up your event, click on "Save". If you need to add more options, click on "Edit".

More options

- **Event Coordinator:** By default, the Event Coordinator is pre-populated with your name. If you are not going to be the contact person for the event, but someone else from your club is, select that officer's name from the drop-down menu.
- Off-Campus Details: If your event will be held off campus, please review the address you enter into this section by going to http://maps.google.com to validate the accuracy of the address. Otherwise, the map might be displayed incorrectly on your registration page.
- **Detailed description (HTML design):** Click on "Detailed description (HTML design)" to enter a detailed description for your event. Otherwise, the description in Section 1 will be used if this section is left blank.
- Access: There are a few options to choose who should be allowed to register to your event. For "This event is open to:", pick the option that meets your event's needs.

Registration options

There are three options for registration. The first is that there is no registration involved: just click on "No" for "Should people RSVP?".

The second is if you are using a third party for your event's registration. Click "No" on the question, "Should people RSVP?". Then click on "Enter an external registration URL" (if registration is handled by a third party).





The third option is the registration feature within CampusGroups. Click "Yes" for "Should people RSVP?". By default, there will be an automatic \$0 priced registration setup if "Yes" is selected with a name called "RSVP".

If your event falls into the following criteria:

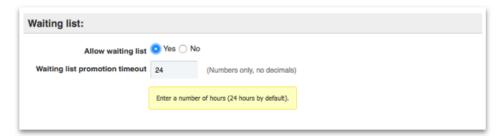
- Requires registration but there is no fee associated with it
- Unlimited capacity
- No end time to your registration
- No requirement for the minimum and maximum number registered or purchased
- Not limited to a particular target audience

Then you can leave the default setting as is.

Option	Price	Registrations Ends	Total # of Items for Sale	Waiting List Activation	Items Sold	Waiting List	Manage
RSVP	\$0	Tue, Jun 24	No limit	Off	0	-	Edit Delete Access
• Add New Option				Total:	0		

Otherwise, you will need to modify your default List of options. To update the default registration option, click on "RSVP" under the "Option" column.

To add a waiting list, set a capacity and check "Allow waiting list". The waiting list is automatically activated once all the available tickets are sold. You can promote people manually to the main list of attendees of the event. (If a student is moved from the waiting list, by default he or she has 24 hours to accept the ticket. To change the time restriction, enter a number of hours under "Waiting list promotion timeout".)





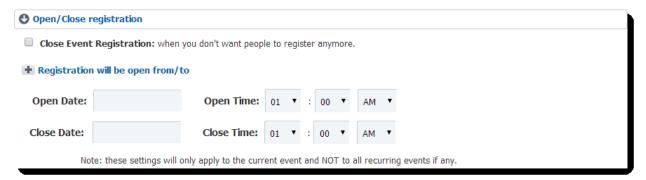
To create another option, click on "Add New Option".

If you need to restrict who can view the registration option you have just created, click on "Access" under the Manage column to set which audience will have the permission to view this registration option.



Open/Close registration

If you would like to close the event registration, expand this section and fill in the appropriate information. Close Event Registration: Check the checkbox if you would like to close the registration immediately.

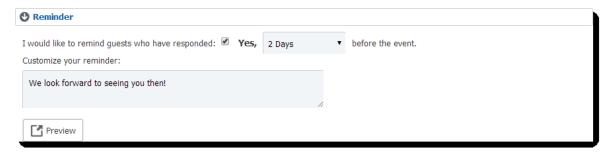


Reminder

You can set up this area to send reminders to everyone, or check the "Yes" checkbox if you would only like to send reminders to those that have responded.

Enter your customized reminder message in the text area.

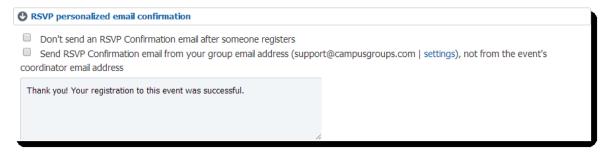
The email will be sent out on your behalf.





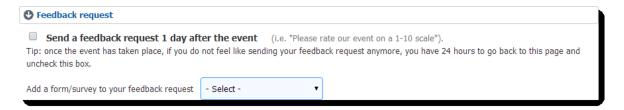
RSVP personalized email confirmation (optional)

By default, attendees will receive a confirmation email upon registration. The default message states "Thank you! Your registration to this event was successful." If you would like to change this default message or select not to send a confirmation email, click on this section and update the settings.



Feedback request

If you would like to request feedback from your participants, you can expand this section and check the checkbox "Send a feedback request 1 day after the event".



Redirect URL after registration

If you want attendees to be redirected to a specific URL after registering to your event, you can enter the URL here.





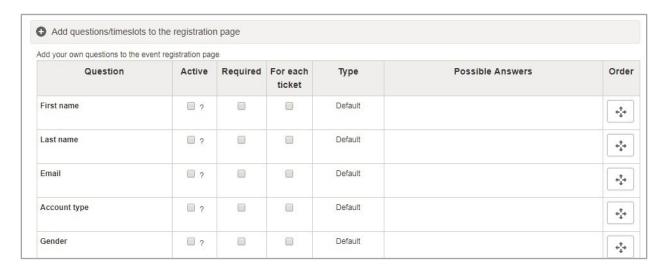
Add questions/timeslots to the registration page

For each registration, the following fields are mandatory:

- First name
- Last name
- Email

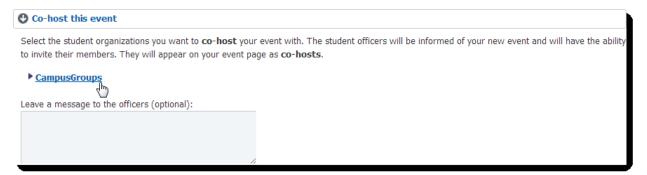
If you do not wish to capture the default options, or if you prefer to capture other information about a user such as degree, phone number, street address, etc., check or uncheck the appropriate checkboxes.

From there, you can also use the time slot feature if you are hosting an all-day event that may have various available sessions for which a user can register.



Co-host this event

If your event is co-hosted by another club, click on your school name and select the club that will co-host the event with you. On the registration page, that club will appear as a co-host.



After you have entered all the required information for your event, click on "Save". If you are still unsure about some content, you can also select to "Save as Draft".



To start promoting your event, click on the title of your event to be directed to the Event details. Within the event details page, you will have the ability to Edit, Preview, Invite, Delete or Duplicate your event information (Duplicating will not keep the same room reservation).

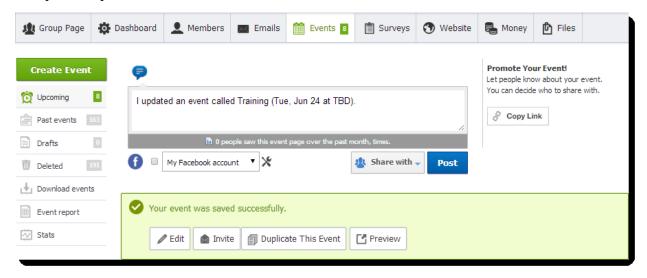
In addition, you can add someone to the event registration, see the list of attendees or upload the attendance list.

Promote your event

Post the event on the feed

Once your event is created, a pop up will be displayed, allowing you to post the event on the school feed

Your message will be displayed on the Home Page for every student when they log on CampusGroups.



Shortened link

We provide you a shortened link to your event that you can paste on Facebook, Twitter, emails, etc. Click on the "Copy Link" button to get this link.

Invite people

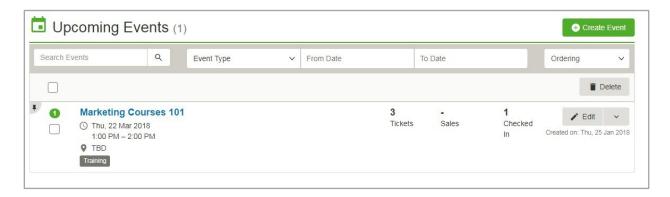
- 1. Click the "Invite" button.
- 2. Select the membership groups you would like to target. For example, only officers, MBA 1st year, etc.
- 3. Click "Compose email for selected groups".
- 4. Edit the recipients list as needed.



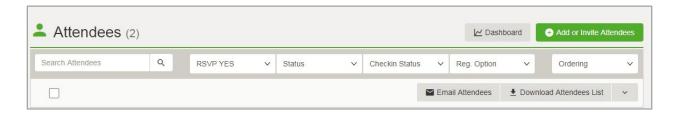
- 5. Select an email template if desired.
- 6. Compose the email.
- 7. Your event is automatically selected and will be embedded in the email.
- 8. Preview the email by clicking the "Preview it first..." button.
- 9. Click the "Save and Send" button to send the email.
- 10. Once the email has been sent, use the email tracking feature to learn which percentage of recipients has opened the email by clicking the RSVP link and more. In the "Email" section, the "Stats" button allows officers to see insightful data regarding who opened the email and when

Add attendees

Manage the list of people who RSVP'ed to your event by clicking on the event name.



Click on "Add or Invite attendees" to add one or several persons to the event. You can add current members by searching them by name, or you can add new users by using their email addresses.



Download the list of attendees

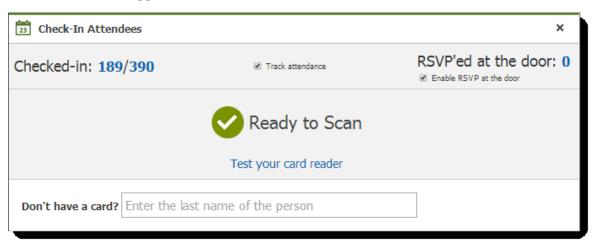
Get an excel file with all users who have RSVP'ed and paid to your event by clicking on "Download Attendees List".



Check-in attendees

To track attendance or to make sure people at the door have actually RSVP'ed and paid, manage the event and click on "Check-In Attendees".

You can either use the card swiping feature, scan QR codes or check in users manually by searching their name in the "Enter the last name of the person" field. You can also use our iPhone or Android applications to check in students at the door.



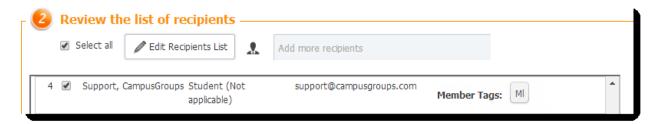


6. Emails

To create an email, mouse over the "Emails" top menu and click the "Compose email" submenu. Select the list of your recipients and then click on "Compose Email for selected group".

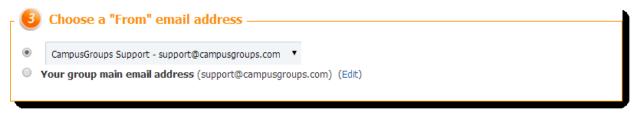
List of recipients

Add more recipients by using the "Add more recipients" lookup, or directly add email addresses in the Cc or Bcc fields.



Choose a "From" email address

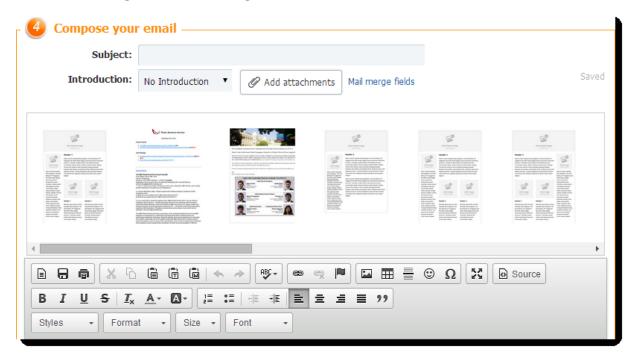
By default, the "From" email address is pre-populated with your email. If you are not going to be the contact person for the email but someone else from your club is, select that officer's email from the drop-down. You can also select the group email address.





Compose your email

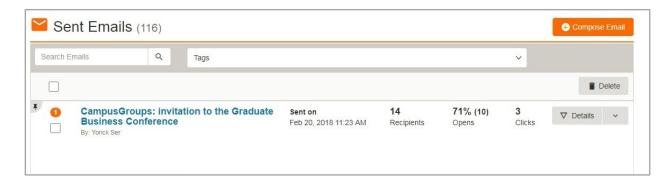
Several templates are available under the "Email templates" section. You can customize them very easily and add your group logo, a header, your social bookmarks, etc. Select the template if desired and change the content using the text editor.



You can add an event or a survey to your email by checking their checkboxes below the text editor. Preview your email first, and then click on "Save and Send".

Track your email statistics

Track the number of Read/Opened emails under the "Sent emails" section. More statistics are available by clicking on "Stats".

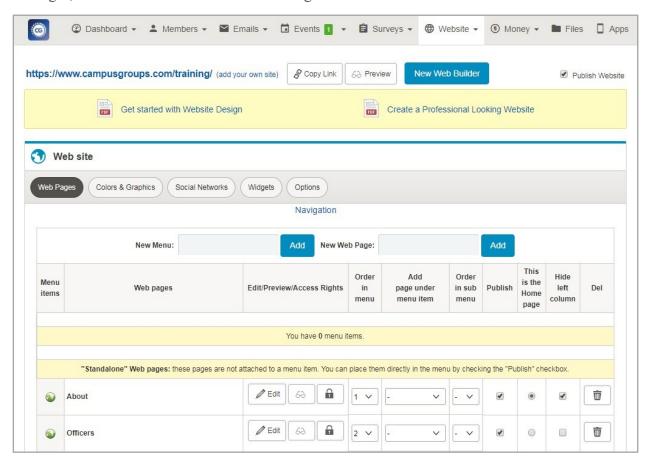




7. Website

Every group has a website available to them for internal or public-facing use. If you already have an existing web site, you can keep it as your default site.

To begin, click on "Website" > "Edit Web Pages".



To view your website, click on "Website" > "Open Website".

By default, all sites will have the primary navigation setup. Feel free to change the settings for each item by clicking on "Access" to select who can view your menus and pages.

Web Pages

Select the Web Pages button to control which items are displayed along the top tool bar in your website. Officers can add or remove pages and menus.

Please note the access rights can be independently set for each page.



Colors & Graphics

The Colors & Graphics button allows you to modify the colors and graphics of your website, as well as your group's banner and logo.

Social Networks

The Social Networks button provides you with the ability to activate or deactivate the various social networking tools available for your disposal.

Widgets

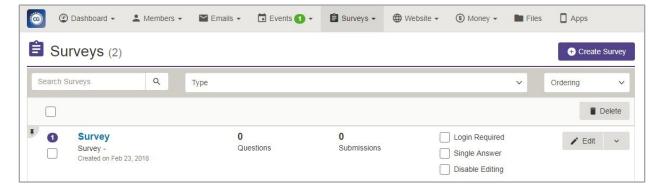
The Widgets button explains the available widgets that can be displayed on your site, such as your event calendar, officers list and contact information.

For the website, you can also add a blog, useful links or a forum.

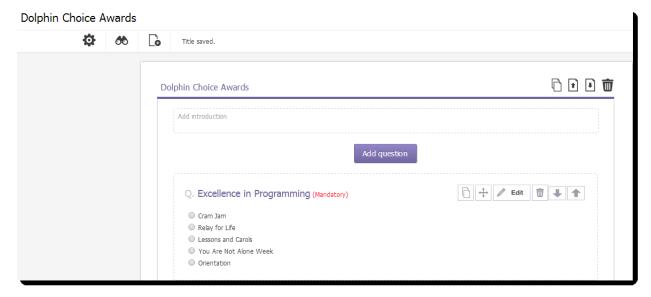


8. Surveys

A survey is a simple list of questions. Retrieve all the submitted answers by clicking on the survey's name. CampusGroups aggregates responses for you and displays percentages.



When you click on "Create Survey", you will be taken to a survey editor where you can create your questions, question types, and answers. Easily sort them by using the drag-n drop feature.





Settings

Manage your survey settings under the "Settings" section.

- Open date: Enter the date users can start answering the form.
- Close date: Enter the date the form submissions end.
- **Login required:** By default your forms are filled in anonymously. But if you want to know who is filling it, we can require people to log on.
- **Disable editing:** If activated, users will not be able to edit their answer after submission.
- **Single answer:** If activated, users will not be able to submit several answers.
- Upon submission, send notifications to members tagged with: All officers tagged with this specific tag will receive a notification email when an answer is sent.

Access

There are a few options as to who should be allowed to answer your form. Pick the option that meets your form's needs by clicking on "Access rights" next to the "lock" icon.

Promote your survey

Send the survey to your members by clicking on "Send".

Organize officer elections

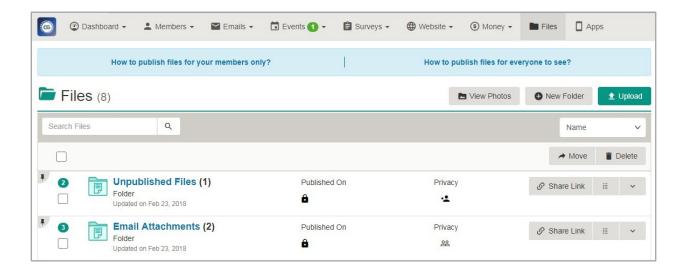
One of the "Question Types" is called "Elections". This allows you to list the candidates for a given officer position in your group, along with the photo of the candidate, his/her description and an attached document, or a link to a video.



9. Files

To upload and share photos or documents with your group, click on Files.

You can upload documents by clicking on "Upload".



Classify and share your files by adding them under folders or albums and set who should be allowed to access these files. You can also create sub-folders.

Change your documents directly from the platform by clicking on "Edit".

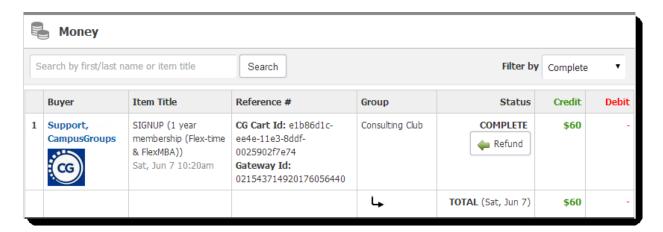


10. Payments

Officers are able to track payments made to their group using the "Money" tab. This function allows officers to note who has paid for events or club membership fees, how much, approve refunds, and more.

View past payments

- 1. Manage your group.
- 2. Click on the "Money" tab.
- 3. Retrieve all the transactions including the name of the student, the item purchased, the amount of the payment and status of the payment.



Manage refunds (Optional feature)

All refunds requests must be initiated by the student who requires the refund. To do so, the student should log on CampusGroups, click on the "Profile" drop-down in the top right corner of the page and select "My Payments". From this page, the student may request a refund for any payments made.

Once a student has requested a refund, an officer must approve the refund. To do so, please follow the instructions below:

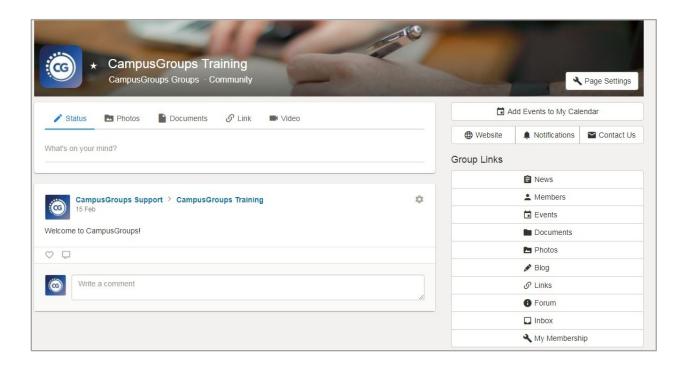
- 1. Manage your group.
- 2. Click on the "Money" tab and then on "Refund Requests" to retrieve all refunds that have been requested.
- 3. Click "Respond" to approve or deny the request.
- 4. Please note that once the refund is approved, the request is sent to the club in charge of issuing the refund.



11. Group page

Each group has its own Groups Page where members can go to learn more about ongoing activities.

Officers can edit the group logo and the group cover, which is the background image. Every member can see this page and post on the group feed.



Select the links you want to display on your group page under the "Page Settings" section.

Share your files and photos on the feed.

12. Support contacts

For more information, go to our support website, http://help.campusgroups.com/

If you have any questions or suggestions, feel free to contact us at support@campusgroups.com. We will be happy to answer your emails.