

WCAA Web Platform BLUEprint 2020 Session Q&A

Please also see [helpful answers previously posted](#)
in the FAQ section of the [training page](#).

TRAINING AND ADMINISTRATOR ACCESS

Is there training for new web administrators?

Yes, please visit: <https://alum.wellesley.edu/admin-training>

Does training cover how to insert pictures in email blasts and change font sizes and colors?

Yes, there is a section specifically on “Sending Emails” that will cover how to create a Message.

Who should I go to if I have a question?

Please send an email to wcaawebsupport@wellesley.edu.

If there is a new web administrator for my group, how can they get access to the site?

Please send an email to wcaawebsupport@wellesley.edu with details.

Is there a limit to how many administrators a group can have?

We recommend that each group has at least two people with administrative rights, typically the President and Web Administrator. Additional volunteers can be set up if necessary.

RESOURCES

Are web administrators able to view other group’s Resources on the back end?

Each group can only see their own resources. The BLUEprint demonstration was conducted by staff with full administrative access to the entire site, which is why you may have noticed that multiple groups were visible. This access is limited to our staff so that we can perform top level administrative tasks and assist you as needed.

Why is “public” used in reference to items added to Resources?

In this case “public” means that when you add a photo to your site it is public unless it is added to a page that is behind a firewall. It does not mean that your Resources are public to all other groups on the platform.

Is there a place to upload photos so that they’re seen only by the group’s web admin but are not visible on the main class page?

Yes, this is exactly what the Resources folder is for. Only those with administrative access for your group can see them there. Once they are put into a gallery they are viewable by the public (or behind a firewall requiring a Wellesley login). Resources can also include videos, PDFs, and audio files in addition to photos.

If a photo will only be used once, does it still have to go in Resources?

Yes, any photo you use regardless of how often has to go in Resources. The only exceptions are if you are including an image on a Form or Calendar Event (not a Post Event)—in these cases you can upload an image directly from your computer.

Is there a limit on how many megabytes an image can be? Or a limit on the number of images put into Resources?

Images can be no larger than 100 MB. There are no restrictions regarding how many images can be included.

MESSAGES

Are there new Messages templates to use for email building?

We have added two new templates that all groups can use that appear in the template drop down menu. These new templates are based on the layout of the Wellesley Club of Boston emails that were shown in the BLUEprint session. Once you select one, you can use it as is, or adapt it as you wish. One template is for event-related Messages and it is called **Event Information Email Template**. The other is called **Template Suggestion for Regular Email Blasts from WCAB** and is a general e-newsletter format.

Can groups access Message formats created by other groups?

You will only be able to access your own Messages. However, the new templates mentioned above will give you more options to work with. We encourage you to experiment with the layout of your emails by incorporating different element options. Once you have a format you like, you can clone that Message for future sends.

Is it possible to have someone’s nickname instead of their first name appear in the salutation of an email?

It is not possible to use anything other than “first name” data to avoid having the name appear blank in the salutation. There is not currently a way to apply any conditional logic to merge fields. If there is no information in the “nickname” field, no information will be presented in that space, and that is true for a high percentage of every list.

Can you send an e-newsletter as an attachment via an email blast?

Please do not send attachments and instead insert any document as a link. Please [read why that is advised](#) and [how to link a file in a Message](#).

Can photos be added to an email directly from my computer?

You must upload the image through Resources first. Only then will the photo be available to insert into your Message.

Can we send text messages to our group members?

You may use the platform to communicate with your group via email, but texting is not an available option.

CALENDARS AND EVENT POSTS

For Calendar Manager instructions - please watch the video added to the [training page](#).

What are the advantages of using the Calendar?

The calendar allows your constituents to see all events at a glance. It also gives you the opportunity to share your events on the main WCAA calendar.

Are the Calendar and Event Posts related?

They are separate components meant to complement each other. If you create an event post you can add the link to the Calendar listing. Calendar entries can't be made into a Post—you will need to do that separately.

Is there information we shouldn't include on a Calendar listing or Event Post?

For security purposes, please do not include Zoom links with your public facing event information. Details like that should be sent to your group or registrants directly. The same would be true of information such as a home address where an event is taking place.

How do you get Event Posts to display chronologically based on event dates?

Posts can be re-ordered by changing the start date in the post. When you go into the news or events boards, you will see that the oldest post is last on the list. This also means that the oldest post will appear last in the list of news/events. You can change the date by editing the start date which can be viewed on the right hand side of the post's editing page.

The screenshot shows a form with three date/time selection fields: 'Start' (set to 4/6/2020 5:18pm), 'Featured Until', and 'Expire'. A red arrow points to the 'Start' field. Below the fields, it shows 'Last Modified: 5/1/2020 2:54pm by Tulika Verma' and 'Created: 4/9/2020 5:18pm by Tulika Verma'. Below the form are several expandable sections: '+ Summary', '+ Category & Tags', '+ Thumbnail & Resources', '+ Comments', and '+ Additional Settings'.

How can we display past events and past newsletters?

We have access to past events from the prior system. If you would like to have your past events appear on a Past Events page, please contact wcaawebsupport@wellesley.edu. It is also possible to set up past messages to feed to a Past Newsletters page.

MEMBERSHIPS

We are working with the College technology team to implement additional membership features. We expect to have more details in early 2021.

FORMS


Can Forms I create for my group be accessed by the other web admins in my group?


Yes, all forms can now be accessed by all web administrators. This is a change from when only the person who created the form could see it. Here are some important tips:

- Include your group name in the form name and make sure your title is clear what the form is for.
- **Please use caution to ensure you are editing and cloning only your own group's forms.**
- You can search by form name using the search field on the top left bar. You can also search by Category (see below to add that information to new and existing forms), which

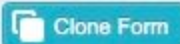

will display only your group's forms.

ALL FORMS


Forms with unreviewed submissions are **bold** and those marked with  have unpublished changes.

| Form Name | Status | Last Submission | Submissions | Last Edited | Categories |
|------------------------------------------------------------------------------------------------------------------------------|--------|-------------------------------|-------------|-------------------------------|-----------------------------|
| <input type="text" value="1960"/> cancel | | | | | <input type="text"/> cancel |
| 1960 Alpha Mini | | November, 09 2020 10:50:10 | 1 | November, 06 2020 15:32:12 | |
|  Wellesley Class of 1960 Membership Form | | | 0 | November, 02 2020 13:54:30 | |

- When creating the form, select your group as a Category, which will then allow you to filter just your groups forms using the Categories Search.
 - To add a Category, select “edit” next to Categories in the Form Info area on the top left. Once you select edit, a list of groups will appear and you can check off your group.

FORM INFO

Last Submission: **11/9/2020**
of Submissions: 1
Created: **11/2/2020**
By: **schansky**
Last Edited: **11/6/2020**
By: **schansky**
Location: [Where used >](#)
Categories: [edit](#) 

Categories

- Atlanta
- Austin
- Baltimore
- Beijing
- Boston

Can we accept donations to our group with Bluesnap?

If your group has a bank account and has set up Bluesnap, there is a membership form created for you that includes an area at the bottom for donations. You can customize the form or add additional donation fields; for example, to collect for Book Awards as well as dues. All transactions on the form will be processed with Bluesnap and all of the funds collected through that form will go into your account. Please note that donations to the College, such as to the Wellesley Fund, must be made through the College's giving page, since your Bluesnap account is tied to your group's bank account directly.

How do we make sure payments go to our group Bluesnap account?

On the Payment tab of every form, you select where payments should be made. As long as your group has an account with Bluesnap, your group name will appear on the list and you can choose that designation.

How can you view the column format for the Results section of a Membership Form?

You can add a column to the Results tab that gives you the status of the transaction. You can do this by going to Set Columns and choosing which ones you would like displayed from the right side. Once you click on them they will be added to the left hand column and then you can select Set at the bottom right. **Please note that any changes you make to your columns will only be visible to you. Other admins will need to set up their own Results tab columns.**

The screenshot shows the 'Set Columns' dialog box in a software interface. The dialog is titled 'Set Columns' and is divided into two main sections: 'Selected Columns' on the left and 'Available Columns' on the right. The 'Selected Columns' list includes: Review Status, Submitted, Full_Name, Email_Address, Club_Name, Volunteer_Role, Number_of_Books, Shipping_Addres, Total_Cost, Payment Status, and Card Number. The 'Available Columns' list is categorized into three groups: 'Payment Info' (2/17) which includes Card Number, Card Type, Expiration Month, Expiration Year, Name on Card, Payment Status, Payment Type, Recurrency End Date, Recurrency Next Date, Recurrency Prior Date, Recurrency Start Date, Recurring Amount, Recurring Gross Total, Recurring Payments Made, Transaction Date, TransactionID, and Transaction Total; 'Form Fields' (7/7) with a 'Deselect All' button; and 'Submission Info' (2/7) with a 'SelectAll' button. At the bottom of the dialog, there are 'Reset Columns' and 'Set' buttons. In the background, a navigation menu shows 'Results' selected, and a toolbar contains buttons for 'Mark as reviewed', 'Delete Selected', 'Purge All', and 'Export'. A table header is visible with columns: Submit ID, Review Status, Submitted, Full_Name, Email_Address, Club_Name, Volunteer_Role, Number_of_Books, Shipping_Addres, and Total_Cost.

The column will say **Completed** once payment is made, **Abandoned** if the form was filled out but the payment portion was not completed, **Awaiting Payment** indicates check, pledge, or other non-credit card options were selected, if these options were included. Once the payment has been received, a site admin can then manually edit this entry to reflect the new "Completed" status or **Completed (0 sum)** - indicates that someone has submitted a payment form where payment was **not** required and \$0 is an acceptable final price (the distinction between this and the **Completed** status will help when reconciling form submissions with your payment gateway reports).

| ID | Review Status | Submitted | Full Name | Email Address | Club Name | Volunteer Role | Number of Books | Shipping Address | Total Cost | Payment Status | Card Number |
|----|---------------|-----------------------|---------------|------------------------|---------------------------------------------|-----------------------------------------|-----------------|--------------------------------------------------------------------|------------|------------------|-------------|
| | Unreviewed | 06/19/2020 5:18 PM | Walter Chan | alanchan@gmail.com | Norwalk | Books | 2 | Walter Chan | 48.00 | Abandoned | --- |
| | Unreviewed | 06/18/2020 1:22 PM | Walter Chan | alanchan@gmail.com | New York Welfare Club | AAS/CP | 6 | Walter Chan 1000 New York, NY 10008 | 180.00 | Awaiting Payment | --- |
| | Unreviewed | 06/12/2020 1:45 PM | Walter Chan | alanchan@gmail.com | Hartford | Book Award Coordinator | 24 | Walter Chan 1000 Hartford, CT 06103 | 576.00 | Abandoned | --- |
| | Unreviewed | 06/09/2020 2:21 PM | Walter Chan | alanchan@gmail.com | Winchester Welfare Club | President | 3 | Walter Chan | 24.00 | Abandoned | --- |
| | Unreviewed | 05/04/2020 4:12 PM | Carrie Kovale | carriekovale@gmail.com | Welfare in Philadelphia | Board Member & Book Club Coordinator | 10 | Carrie Kovale 1000 Welfare Club Philadelphia, PA 19104 | 240.00 | Abandoned | --- |
| | Unreviewed | 05/03/2020 8:39 PM | Walter Chan | alanchan@gmail.com | Welfare Club of Delco-Ford World | Book Award Chair | 9 | Walter Chan 1000 Delco-Ford World | 216.00 | Abandoned | --- |
| | Unreviewed | 05/01/2020 2:18 PM | Carrie Kovale | carriekovale.com | Carrie Kovale | W | 10 | Carrie Kovale | 240.00 | Abandoned | --- |
| | Unreviewed | 05/01/2020 2:04 PM | Walter Chan | alanchan@gmail.com | Welfare in New Haven Alumnae Club | President | 17 | Walter Chan | 408.00 | Awaiting Payment | --- |
| | Unreviewed | 05/01/2020 1:35 PM | Walter Chan | alanchan@gmail.com | Atlanta Club | Book Award Chair | 12 | Walter Chan | 288.00 | Abandoned | --- |
| | Unreviewed | 04/18/2020 1:49 PM | Walter Chan | alanchan@gmail.com | Central New York Welfare Alumnae Club | Book Award Chair | 7 | Walter Chan | 168.00 | Awaiting Payment | --- |