

How to add a Webinar to Zoom & NeoSerra

NOTE If the Webinar platform is not available then follow the Zoom meeting setting in appendix 1

These instructions have been revised to take advantage of the new facility in NeoSerra that allows us to upload attendee information from Zoom. This has allowed us to simplify the registration and reminders process significantly without compromising the data collection we need to provide to our funders.

Setting up the Event

Step #	Where	What
1		Gather details of the webinar. Description, Time & Date, Presenter, Host
2	Zoom	Create Webinar in Zoom Add the description including the disclaimer text as defined in Appendix 2 of this document. Ensure that Registration checked

The screenshot shows the 'Schedule a Webinar' form in the NeoSerra system. Red arrows highlight the following fields:

- Topic:** Test Setup Webinar
- Description (Optional):** This webinar exists to show center directors and others how to create a Webinar in Zoom and Neoserra using the best practice that minimizes the data entry need. It uses the new Import facility added to Neoserra in May 2020. The information provided in this webinar and any supplementary materials provided to registrants are intended for educational and informational purposes only and does not constitute professional financial or legal advice. No registrant should act or fail to act on the basis of any material contained in this webinar without obtaining proper financial, legal or other professional advice specific to their situation.
- Use a template:** NorCal SBDC Generic Webinar Template
- When:** 05/23/2020, 3:00 PM
- Duration:** 1 hr 30 min
- Time Zone:** (GMT-7:00) Pacific Time (US and Canada)
- Recurring webinar:** ☐
- Registration:** ☒ Required

3	Zoom	<p>Check Q&A, Enable Practice Session, Record the webinar automatically. In the Cloud</p> <p>If you have a colleague with a zoom account from the same source as you, who will be helping you with the webinar, then consider adding them as an Alternate Host</p>
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The screenshot shows the Zoom webinar settings interface. Red arrows highlight the following settings:

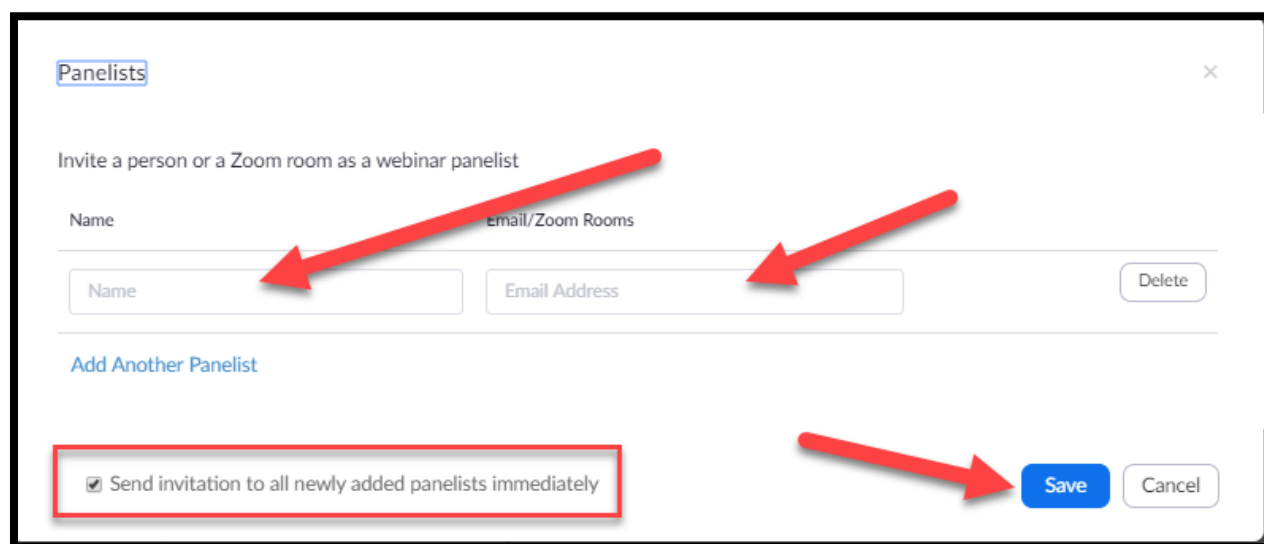
- Webinar Password:** ☐ Require webinar password
- Video:**
 - Host: ☒ On ☐ Off
 - Panelists: ☒ On ☐ Off
- Audio:**
 - ☐ Telephone ☐ Computer Audio ☒ Both
 - Dial from United States of America [Edit](#)
- Webinar Options:**
 - ☒ Q&A
 - ☒ Enable Practice Session
 - ☐ Only authenticated users can join
 - ☐ Make the webinar on-demand
 - ☒ Record the webinar automatically
 - ☐ On the local computer
 - ☒ In the cloud
- Alternative Hosts:**
- Buttons:** [Schedule](#) [Cancel](#)

4	Zoom	On Invitations Tab: Invite Presenter as Panelist
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Invitations Email Settings Branding Polls Q&A Integration Live Streaming

Invite panelists Edit



Panelists ×

Invite a person or a Zoom room as a webinar panelist

Name Email/Zoom Rooms

Name Email Address Delete

[Add Another Panelist](#)

☒ Send invitation to all newly added panelists immediately

Save Cancel

5	Zoom	On the invitations tab click Edit to the right of the Approval Options to access the Registration options
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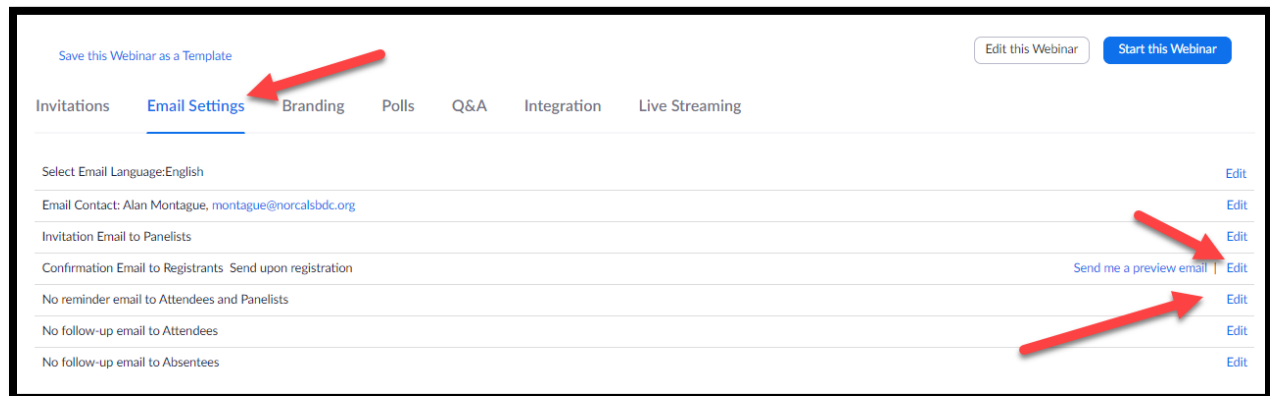
The screenshot shows the 'Invitations' tab in the Zoom interface. Under the 'Approval' section, there are three options: 'Automatically Approve', 'Close registration after event date', 'Allow attendees to join from multiple devices', and 'Show social share buttons on registration page'. A red arrow points to the 'Edit' link located to the right of the 'Approval' section.

6	Zoom	On the Registration Tab: Ensure that Registration Required is checked along with Automatically Approve, Close registration after event date and Allow attendees to join from multiple devices
7	Zoom	On the Questions Tab: Make Last Name and Phone Number required fields, add Zip/Postal Code (not required)

The screenshot shows the 'Registration' tab in the Zoom interface. Several settings are highlighted with red arrows: 'Required' (checked), 'Automatically Approve' (selected), 'Close registration after event date' (checked), 'Allow attendees to join from multiple devices' (checked), and 'Show social share buttons on registration page' (checked). The 'Save All' button is visible at the bottom right.

The screenshot shows the 'Questions' tab in the Zoom interface. Several fields are highlighted with red arrows: 'Last Name' (checked), 'Zip/Postal Code' (checked), 'State/Province' (checked), and 'Phone' (checked). The 'Save All' button is visible at the bottom right.

8	Zoom	On the email Settings tab: If you want to customize the registration confirmation click Edit then make your changes. Include the ADA disclaimer language following as part of the additional text Reasonable accommodations for persons with disabilities will be made if requested at least two weeks in advance
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Save this Webinar as a Template Edit this Webinar Start this Webinar

Invitations **Email Settings** Branding Polls Q&A Integration Live Streaming

Select Email Language: English Edit

Email Contact: Alan Montague, montague@norcalsbdc.org Edit

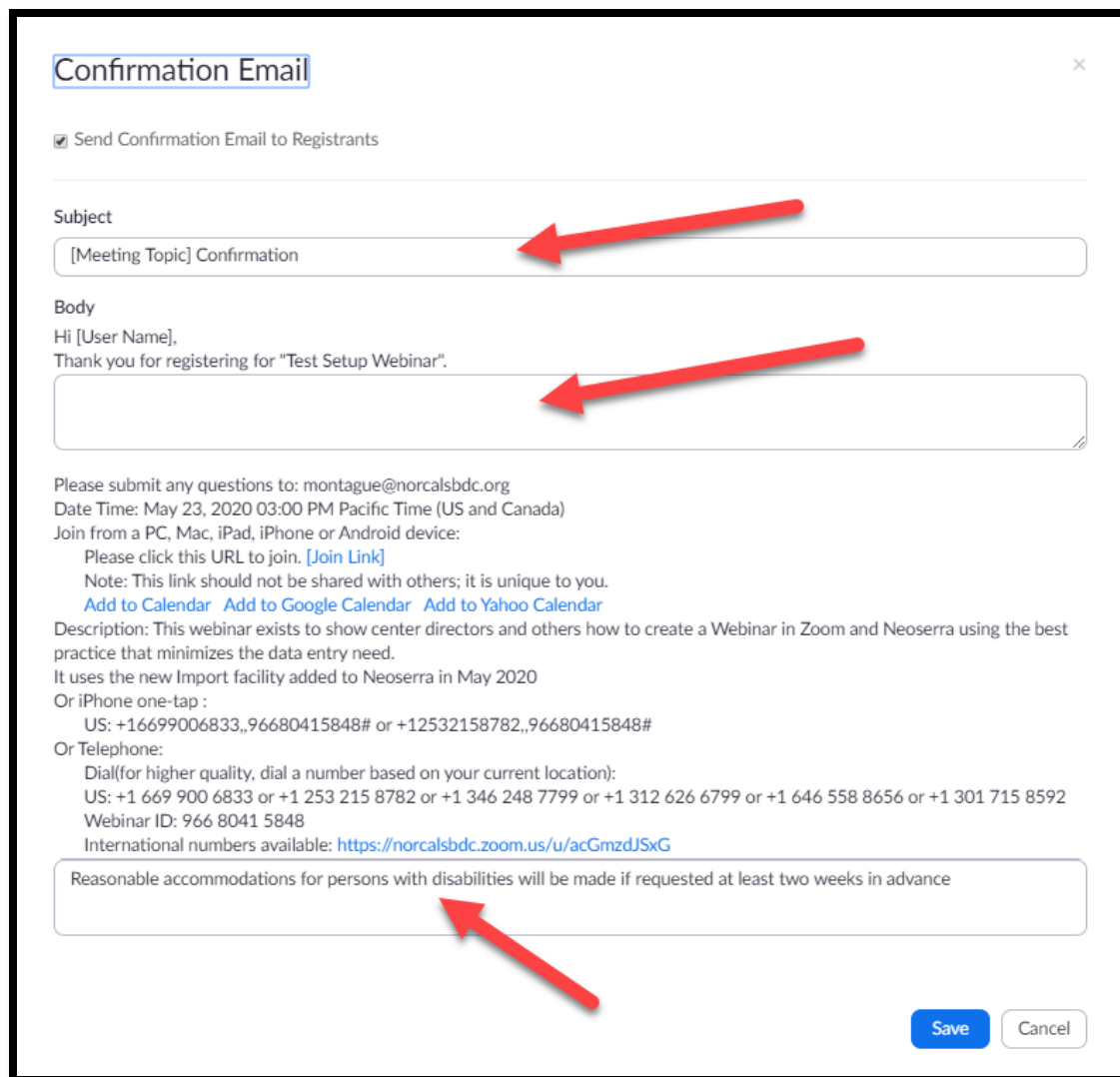
Invitation Email to Panelists Edit

Confirmation Email to Registrants Send upon registration Send me a preview email Edit

No reminder email to Attendees and Panelists Edit

No follow-up email to Attendees Edit

No follow-up email to Absentees Edit



Confirmation Email

☒ Send Confirmation Email to Registrants

Subject
[Meeting Topic] Confirmation

Body
Hi [User Name],
Thank you for registering for "Test Setup Webinar".

Please submit any questions to: montague@norcalsbdc.org
Date Time: May 23, 2020 03:00 PM Pacific Time (US and Canada)
Join from a PC, Mac, iPad, iPhone or Android device:
Please click this URL to join. [\[Join Link\]](#)
Note: This link should not be shared with others; it is unique to you.
[Add to Calendar](#) [Add to Google Calendar](#) [Add to Yahoo Calendar](#)
Description: This webinar exists to show center directors and others how to create a Webinar in Zoom and Neoserra using the best practice that minimizes the data entry need.
It uses the new Import facility added to Neoserra in May 2020
Or iPhone one-tap :
US: +16699006833,,96680415848# or +12532158782,,96680415848#
Or Telephone:
Dial(for higher quality, dial a number based on your current location):
US: +1 669 900 6833 or +1 253 215 8782 or +1 346 248 7799 or +1 312 626 6799 or +1 646 558 8656 or +1 301 715 8592
Webinar ID: 966 8041 5848
International numbers available: <https://norcalsbdc.zoom.us/j/acGmzdJSxG>

Reasonable accommodations for persons with disabilities will be made if requested at least two weeks in advance

Save Cancel

9	Zoom	Back to the email Settings tab, click the Edit next to No reminder email to Attendees and Panelists then select reminders for 1 hour and 1 day before the webinar start time. You can also add any extra information you want to the email.
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Reminder Email ×

Send Reminder Email to Approved Registrants and Panelists

☒ 1 hour before the webinar start date and time
☒ 1 day before the webinar start date and time
☐ 1 week before the webinar start date and time

Subject

Reminder: [Meeting Topic] starts in [time]

Body

Hi [User Name],

This is a reminder that "Test Setup Webinar" will begin in 1 hour / 1 day / 1 week on:

Date Time: May 23, 2020 03:00 PM Pacific Time (US and Canada)

Join from a PC, Mac, iPad, iPhone or Android device:

[Click Here to Join](#)

Note: This link should not be shared with others; it is unique to you.

[Add to Calendar](#) [Add to Google Calendar](#) [Add to Yahoo Calendar](#)

Or join by phone:

US: +1 669 900 6833 or +1 253 215 8782 or +1 346 248 7799 or +1 312 626 6799 or +1 646 558 8656 or +1 301 715 8592

Webinar ID: 966 8041 5848

International numbers available: <https://norcalsbdc.zoom.us/j/acGmzdJSxG>

10	Zoom	On Branding Tab: Upload your center or program logo, Set post Attendee URL to your center URL. If you have a Google Form feedback sheet set up add the URL for that as the Post Webinar Survey (see instructions later for how to do this)
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Invitations Email Settings **Branding** Polls Q&A Integration Live Streaming


Banner Your banner is displayed at the top of your invitation page.

[Upload](#)

Image requirements:

- GIF/JPG/JPEG or 24-bit PNG
- The suggested dimensions: 640px by 200px
- The maximum dimensions: 1280px by 400px

Logo Your logo is displayed on the right side of the webinar topic on your invitation page, registration page, and in the email invitation to the webinar.



[Change](#) [Delete](#) [Add Description](#)

Image requirements:

- JPG/JPEG or 24-bit PNG
- The suggested dimensions: 200px by 200px
- The maximum dimensions: 400px by 400px

Post Attendee URL <https://www.contracostasbdc.org/calendar>

Post Webinar Survey Zoom will open a survey page in attendees' browsers after leaving the webinar

https://docs.google.com/forms/d/e/1FAIpQLSf72cLEdt-ANTuFiVabkQ1tzCThVPKbC1qzWK6hG1p4J6qR1w/viewform?usp=sf_link

11	Zoom	Back on the Invitations tab: Copy the Registration Link
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Invite Attendees Webinar Size: 1000 attendees

Registration Link

https://norcalsbdc.zoom.us/webinar/register/WN_fr5BCZlbRWSKz-VuA0xm... [Copy the Link](#)

Source Tracking Link [+ Add](#)

You have not yet created any source tracking links

12	NeoSerra	<p>Add event to NeoSerra</p> <p>Include the ADA disclaimer language following as part of the description Reasonable accommodations for persons with disabilities will be made if requested at least two weeks in advance. [add contact information for the event]</p>
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neoserra Search 20 Alan Montague
View Activity Manage Help

Training Events / Test Setup Webinar

Training Event

Training Event ID: LC0082 Is SBA888? ☒

Event Title: Test Setup Webinar

Start Date: 5/23/2020 End Date: 5/23/2020

Reporting Date: 5/23/2020 Registration Deadline: 5/23/2020 3:00 PM

Scheduled Time(s): 3:00pm Total Hours: 1:00 (h.mm)

Description:

File Edit Insert View Format Table Tools

Formats Font Family Font Sizes B I

This webinar exists to show center directors and others how to create a Webinar in Zoom and Neoserra using the best practice that minimizes the data entry need.
It uses the new Import facility added to Neoserra in May 2020.

Reasonable accommodations for persons with disabilities will be made if requested at least two weeks in advance.

Training Topics:

- ☐ Accounting/Budget
- ☐ Business Plan
- ☐ Cash Flow Management
- ☒ COVID-19 General Support
- ☒ Disaster Recovery
- ☐ Franchising
- ☐ Importing
- ☐ Legal Issues
- ☐ Mentor-Protégé
- ☐ Procurement Fair
- ☐ Small Disadvantaged Businesses
- ☐ Tax Planning
- ☐ Woman-owned Businesses
- ☐ Base Closure/Community Adjustment
- ☐ Business Start-up/Preplanning
- ☐ Central Contractor Registration
- ☐ Customer Relations
- ☐ eCommerce
- ☐ Government Contracting
- ☐ Internet/Web Training
- ☐ Managing a Business
- ☐ Orientation
- ☐ Risk Management
- ☐ Social Media
- ☐ Technology
- ☐ Business Financing
- ☐ Buy/Sell Business
- ☐ COVID-19 Financing Capital
- ☐ Disaster Planning
- ☐ Exporting
- ☐ Human Resources
- ☐ Layoff Aversion
- ☐ Marketing/Sales
- ☐ Other
- ☐ Selling to Government
- ☐ Subcontracting
- ☐ Veterans Outreach Conf.

13	NeoSerra	<p>Select Program format of 'Webinar'</p> <p>Set Status to No eCenter Signup</p> <p>Then in the Signup URL Field paste the Registration link you copied from Zoom</p> <p>Set Location as 'Online Webinar'</p> <p>For Zip code use the zip code of your center</p> <p>Select the hosting center as Center</p> <p>Add the Point Of Contact's email address (and phone number if applicable)</p> <p>Select your Funding Source</p> <p>Choose NO under Post this to eCenter</p>
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Primary Training Topic: * Orientation

Program Format: * Webinar

Status: Open

Maximum Attendees: 98

Allow Waitlist? ☐

Sessions

Number of Reportable Sessions: 1

Sessions:	Title	Start	End	New

Location

Location: Online Webinar

City:

State: (No selection)

ZIP Code: * 94534

Training Address Country: United States

Reporting

Center: * Northern California SBDC Regional Lead Center

Hosted by Center? ☐

Participated by Center? ☒

Cosponsor POC(s):

Partner(s) Participating: + x

Point of Contact:

Point of Contact Email Address: * montague@norcalsbdc.org

Point of Contact Phone Number:

Language Used: English

Unit History: New

Funding Source: * SBA

Sub-funding Source: (Undefined)

Reportable? ☒ ?

eCenter

Reportable? ☒ ?

eCenter

Post this event on eCenter? No

Publishing Center: 23

Event registration information required: (Use center's selection)

Display Time-zone: (UTC -8:00) America/Los_Angeles

eCenter Payee: (No selection)

Pre-event Survey: (No selection)

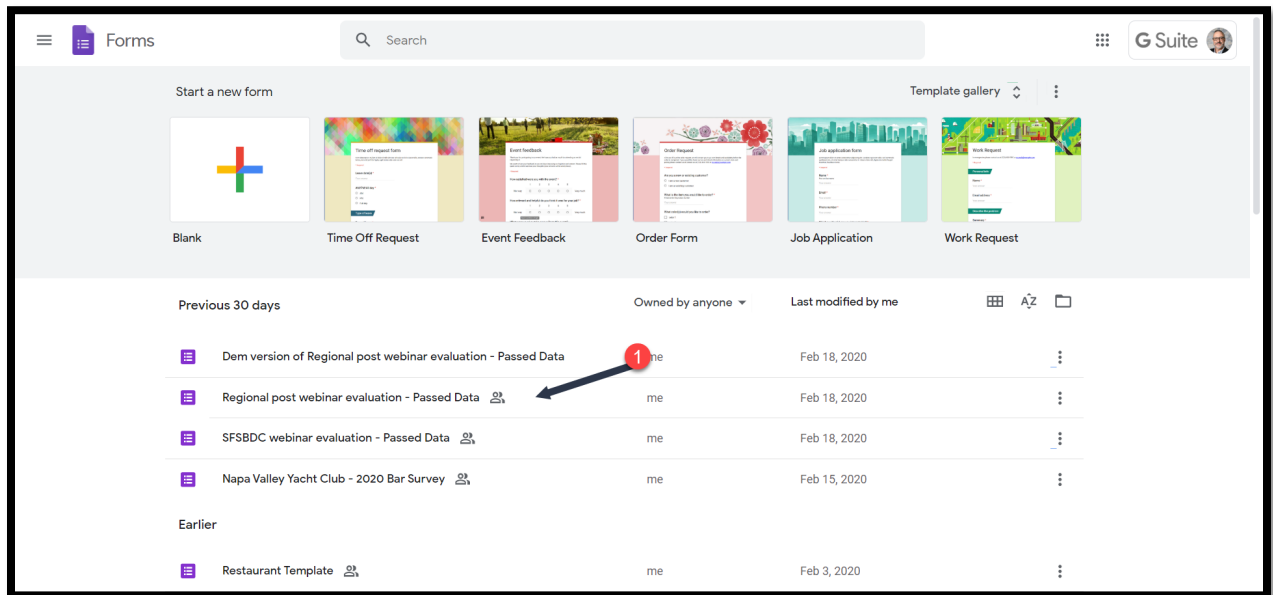
14	NeoSerra	Save the Training event
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Creating a pre-populated online evaluation form.

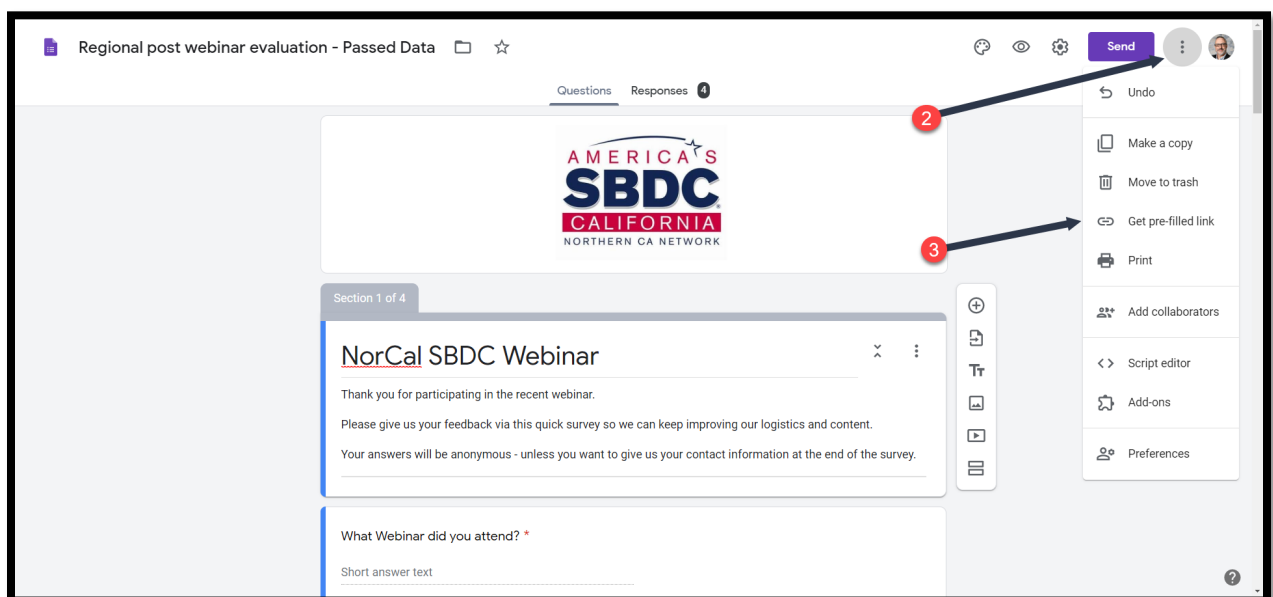
Contact Alan Montague at the lead center and ask him to share with you a copy of the google form used to get evaluations and feedback.

Once you have it follow these instructions.

Open your Google Forms and select the form that you want to use.



Use the menu to select 'Get pre-filled link'



In the 'What Webinar did you attend?' question enter the name and date & Time of the webinar then scroll to the bottom of the window.

AMERICA'S
SBDC
CALIFORNIA
NORTHERN CA NETWORK

NorCal SBDC Webinar

Thank you for participating in the recent webinar.

Please give us your feedback via this quick survey so we can keep improving our logistics and content.

Your answers will be anonymous - unless you want to give us your contact information at the end of the survey.

* Required

What Webinar did you attend? *

Webinar name and Date& Time

Training objectives were clearly communicated *

Pre-fill responses, then click "Get link"

Click 'Get Link'

Your answer

Center

Your answer

Title

Your answer

Email

Your answer

Get link

Never submit passwords through Google Forms.

This form was created inside of Northern California Small Business Development Lead Center. [Report Abuse](#)

Google Forms

Pre-fill responses, then click "Get link"

Click 'COPY LINK' to copy the link to your clipboard

What Webinar did you attend?

Webinar name and Date& Time

Share this link to include pre-filled responses

COPY LINK

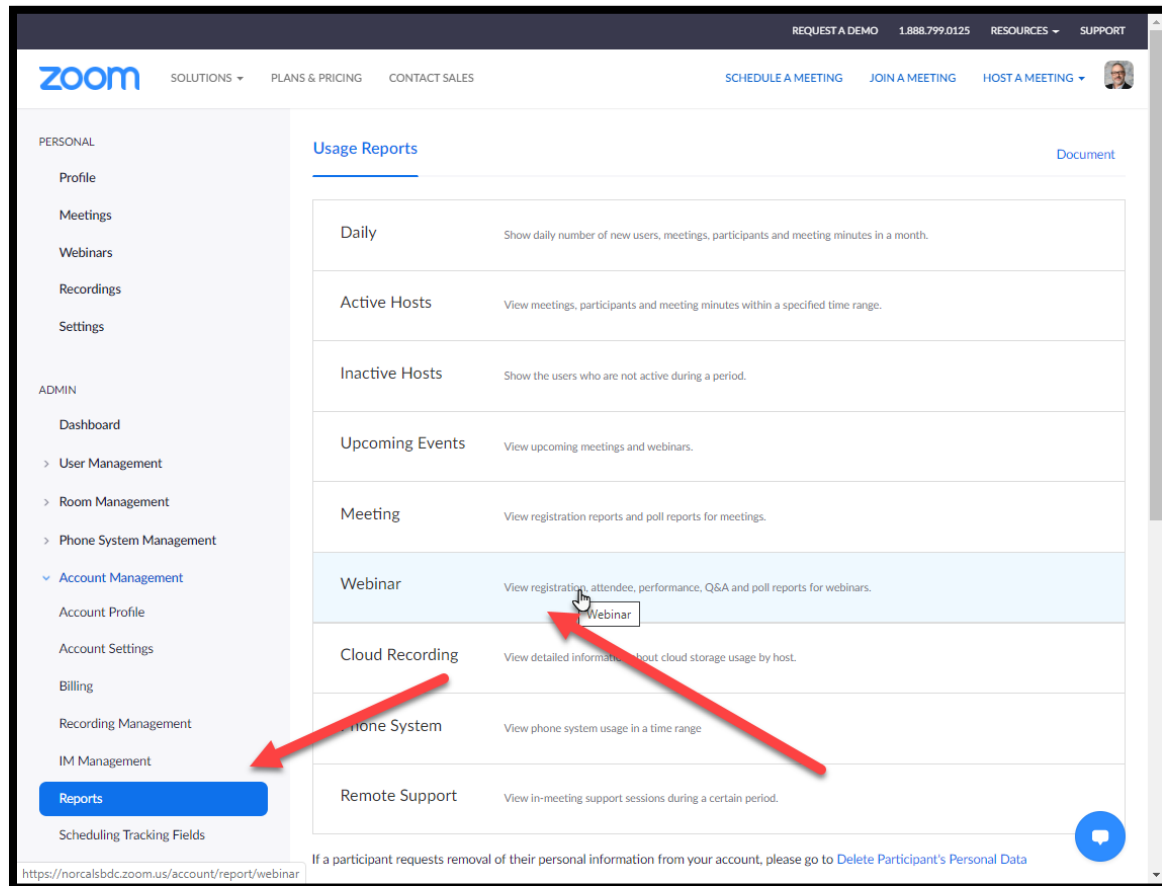
Training objectives were clearly communicated

Now copy that URL into the Post Webinar Survey on Zoom (see above).

Uploading the attendance information after the event

Once the webinar has run you can take the attendance report from Zoom and upload it into Neoserra.

Go to your reports menu (either part of your Personal menu or within the Account Management menu if you are an account admin). Then Select Webinar



Select Attendee Report then find the Webinar you are working on. In The Step 3 Generate Report options, Uncheck 'Summary information will be included at the top of the report' and check 'sort the attendee list by attended status'

Then click Generate CSV Report

The screenshot shows the Zoom Reports interface. The left sidebar contains navigation options under 'PERSONAL' (Profile, Meetings, Webinars, Recordings, Settings) and 'ADMIN' (Dashboard, User Management, Room Management, Phone System Management, Account Management, Account Profile, Account Settings, Billing, Recording Management, IM Management, Reports, Scheduling Tracking Fields, Webinar Settings). The 'Reports' option is highlighted in blue. The main content area is titled 'Reports > Usage Reports > Webinar'. It shows three steps: Step 1: Select Report Type (with 'Attendee Report' selected), Step 2: Choose a Webinar (with a table of webinars), and Step 3: Generate Report (with checkboxes for report options). Red arrows point to the 'Attendee Report' selection, the first row of the webinar table, and the checkboxes in Step 3.

Step 1: Select Report Type

Registration Report ☐ Attendee Report ☒ Performance Report ☐ Q&A Report ☐ Poll Report ☐

Step 2: Choose a Webinar

From: 05/20/2020 To: 05/21/2020 Filter Webinar ID Search

Maximum report duration: 1 Month

Date	Time	Topic	Webinar ID	Unique Viewers	Total Users	Max Concurrent Views
May 20, 2020	01:31 PM	Leading Your Restaurant Team from Uncertainty to Opening	978 7773 1301	19	22	18
May 20, 2020	01:13 PM	COVID-19 Updates Live Q&A Mon/Wed/Fri 10:30am	835 182 602	0	2	0
May 20, 2020	10:14 AM	COVID-19 Updates Live Q&A Mon/Wed/Fri 10:30am	835 182 602	312	396	255

Step 3: Generate Report

☐ Summary information will be included at the top of the report

☒ Sort the attendee list by attended status

Generate CSV Report

Open the file using excel

We advise removing all rows and columns that contain information beyond the contact info that NeoSerra will use. So, delete all columns EXCEPT First Name, Last Name, Email, Phone, & ZIP code (if you collected them)

Also delete any rows that are for people who either did not attend (Attended columns says No) or who you feel should not be considered as having attended. An example here is the attendee who only spent 1 minute in the webinar.

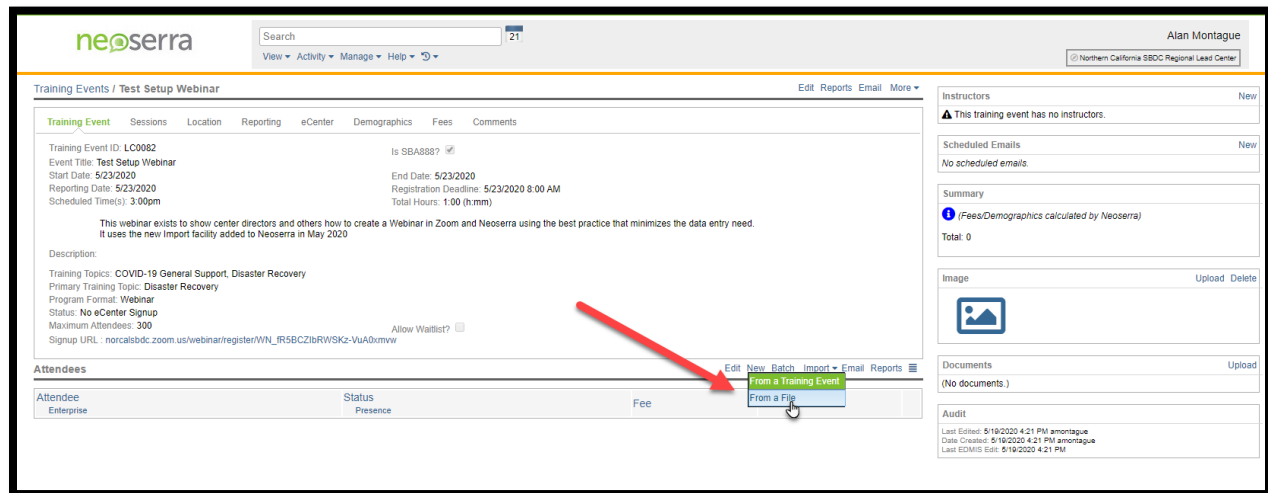
Attended	First Name	Last Name	Email	Phone	Registration	Approval Status	Join Time	Leave Time	Time in Session	Country/Region	Name
Yes	Louise	Dawson	dawson@norcalsbdc.org				5/20/2020 13:31	5/20/2020 13:31	00:00:00	101	United States of America
Yes	Holly	Stiel	Holly@thankyouverymuchinc.com				5/20/2020 13:31	5/20/2020 13:31	00:00:00	100	United States of America
Yes	Brad	Conre	bconre7@blogspot.com	209-991-8002	#####	approved	5/20/2020 13:31	5/20/2020 13:31	00:00:00	1	United States of America
Yes	Adriana	Lopez Vermut	adriana@picapica.com	707-251-3700	#####	approved	5/20/2020 14:09	5/20/2020 14:09	00:00:00	56	United States of America
Yes	Alie	Dempster	adempster8@imdb.com	707-123-0894	#####	approved	5/20/2020 13:47	5/20/2020 13:47	00:00:00	77	United States of America
Yes	Luce	Hassent	lhassent9@mayoclinic.com	925-616-3829	#####	approved	5/20/2020 13:52	5/20/2020 13:52	00:00:00	72	United States of America
Yes	Miriam	Karell	miriam@marinsbdc.org	929-272-3838	#####	approved	5/20/2020 14:08	5/20/2020 14:08	00:00:00	21	United States of America
Yes	Jessa	Berkey	Jessa@foxandgoose.com	530-334-3757	#####	approved	5/20/2020 14:12	5/20/2020 14:12	00:00:00	31	United States of America
Yes	Joe	Rodola	joe@norcalsbdc.org	415-744-9411	#####	approved	5/20/2020 13:31	5/20/2020 13:31	00:00:00	91	United States of America
Yes	Mike	Packard	MikeP@ShopOnThecorner.com	650-151-9830	#####	approved	5/20/2020 14:00	5/20/2020 14:00	00:00:00	64	United States of America
Yes	Penelope	De Gregoli	pdegoli0@youtube.com	209-991-8002	#####	approved	5/20/2020 14:27	5/20/2020 14:27	00:00:00	11	United States of America
Yes	Sal	Spraging	sspraging1@de.vu	707-123-0894	#####	approved	5/20/2020 14:27	5/20/2020 14:27	00:00:00	44	United States of America
Yes	Angelo	Fockes	afockes2@infoseek.co.jp	925-616-3829	#####	approved	5/20/2020 14:01	5/20/2020 14:01	00:00:00	62	United States of America
Yes	Luisa	Considine	lconsidine3@wikia.com	929-272-3838	#####	approved	5/20/2020 14:00	5/20/2020 14:00	00:00:00	65	United States of America
Yes	Alic	Abramowitch	aabramowitch4@samsung.com	530-334-3757	#####	approved	5/20/2020 13:31	5/20/2020 13:31	00:00:00	70	United States of America
Yes	Maynard	Babe	mbabe5@sakura.ne.jp	415-744-9411	#####	approved	5/20/2020 14:01	5/20/2020 14:01	00:00:00	63	United States of America
Yes	Tarah	Audenis	taudenis6@quantcast.com	650-151-9830	#####	approved	5/20/2020 14:01	5/20/2020 14:01	00:00:00	57	United States of America
Yes	Mani	Niall	mani@manistestkitchen.com	707-123-0894	#####	approved	5/20/2020 14:00	5/20/2020 14:00	00:00:00	63	United States of America
Yes	bobby	chang	bcsbdc8@gmail.com	925-616-3829	#####	approved	5/20/2020 13:54	5/20/2020 13:54	00:00:00	70	United States of America
No	Renee	Lindsay	ceo@fortunachamber.com	929-272-3838	#####	approved	5/20/2020 14:01	5/20/2020 14:01	00:00:00	56	United States of America
Yes	Alan Montague	CPTD					5/20/2020 13:57	5/20/2020 13:04	00:00:00	68	United States of America

First Name	Last Name	Email	Phone	Registration	Approval Status
Louise	Dawson	dawson@norcalsbdc.org			
Holly	Stiel	Holly@thankyouverymuchinc.com			
Adriana	Lopez Vermut	adriana@picapica.com	707-251-3700		
Alie	Dempster	adempster8@imdb.com	707-123-0894		
Luce	Hassent	lhassent9@mayoclinic.com	925-616-3829		
Miriam	Karell	miriam@marinsbdc.org	929-272-3838		
Jessa	Berkey	Jessa@foxandgoose.com	530-334-3757		
Joe	Rodola	joe@norcalsbdc.org	415-744-9411		
Mike	Packard	MikeP@ShopOnThecorner.com	650-151-9830		
Penelope	De Gregoli	pdegoli0@youtube.com	209-991-8002		
Sal	Spraging	sspraging1@de.vu	707-123-0894		
Angelo	Fockes	afockes2@infoseek.co.jp	925-616-3829		
Luisa	Considine	lconsidine3@wikia.com	929-272-3838		
Alic	Abramowitch	aabramowitch4@samsung.com	530-334-3757		
Maynard	Babe	mbabe5@sakura.ne.jp	415-744-9411		
Tarah	Audenis	taudenis6@quantcast.com	650-151-9830		
Mani	Niall	mani@manistestkitchen.com	707-123-0894		
bobby	chang	bcsbdc8@gmail.com	925-616-3829		
Alan Montague	CPTD				

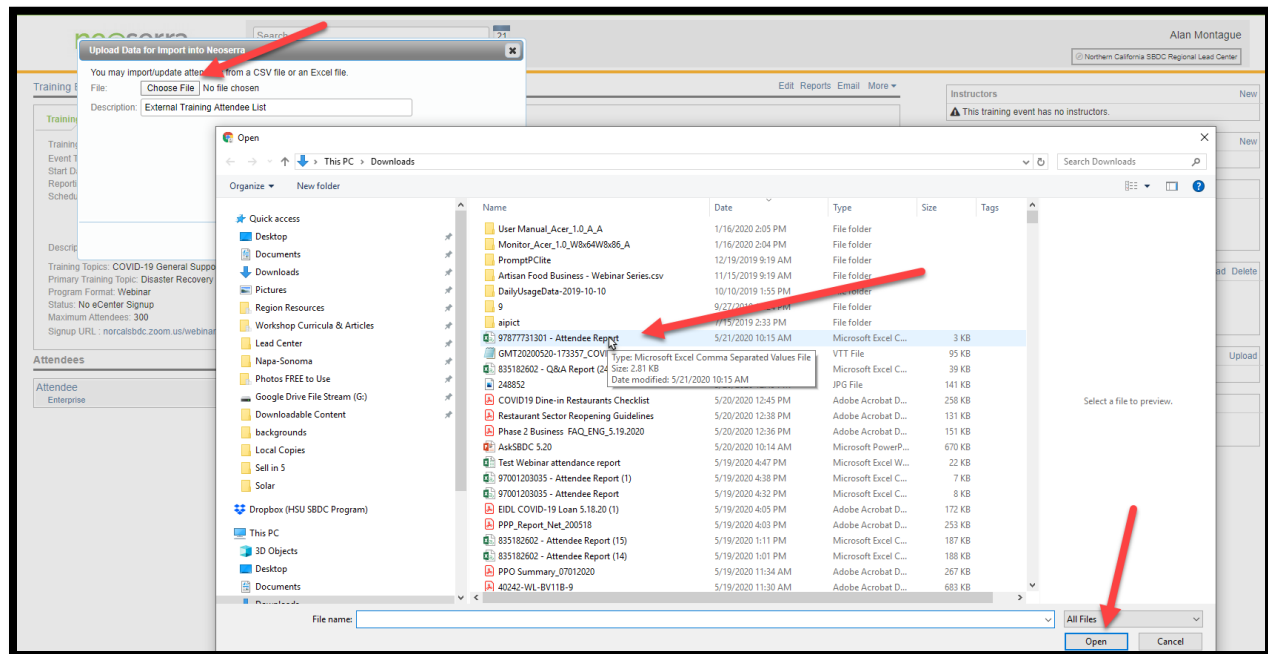
Save the file. We recommend saving it as an excel workbook.

Now log in to NeoSerra and go to the training event.

As the registration was done in Zoom the Attendees section should be empty. Select Import then From a File



Click Choose file then navigate to the file you just cleaned up.



Ensure that all the column headings are correctly identified. Most likely the name and email fields will have been. Pick Phone Number from the drop-down to match the data in phone column (and zip code if you collected it). Then click continue.

◀ ▶

NeoSerra now tries to match the information in the file to existing contacts. For large files this may take some time.

What Neoserra does next depends on how well the details on the uploaded file match the existing contacts in the system.

- No Match:
 - If Neoserra cannot find an existing contact that matches, then it will label the record with 'new' and create a new contact with details from the uploaded file.
- Partial Match
 - If Neoserra finds an existing contact that matches some BUT NOT ALL of the details from the uploaded file, it will give you the option of selecting the existing contact that matches best or adding a new contact. We advise that you prioritize matching email as this is the primary communication we have with our contacts and clients. If the email does not match it's better to add them as a new contact with the email they registered with.
- Exact Match
 - When Neoserra finds an existing contact that matches on ALL the details from the uploaded file, it show you the details of the existing contact and will use that contact to record attendance.

Once you have made your choices, set Status to Attended and Fee to No Fee then press Continue

The screenshot shows the 'Import Options' screen in the NeoSerra system. At the top, there is a search bar and navigation links. Below the header, the 'Import Options' section is visible. It includes a checkbox for 'Add new or unknown contacts to the database?' which is checked. The 'Status' dropdown is set to 'Attended' and the 'Fee' dropdown is set to 'No Fee'. A table below lists imported contacts with columns for Email Address, First Name, Last Name, Phone Number, Contact, and Current Status. Red arrows point to the 'Attended' status dropdown, the 'No Fee' fee dropdown, and the 'Continue' button at the bottom left. Another red arrow points to the 'Contact' column, which shows suggestions for existing contacts for some entries. Labels with arrows point to specific rows: 'Partial Match - Suggest Existing Contacts' for the first row, 'Partial Matches - Select Existing Contacts' for the second row, 'No Matches - New Contacts' for the third row, and 'Exact Matches - Use Existing' for the fourth row.

Email Address	First Name	Last Name	Phone Number	Contact	Current Status
bcorne7@blogspot.com	Brad	Corne	209-991-8002	(new)	(new)
adriana@picapica.com	Adriana	Lopez Vermut	707-251-3700	(new)	(new)
adempter8@imdb.com	Alle	Dempster	707-123-0894	(new)	(new)
lhassent9@mayoclinic.com	Luce	Hassent	925-616-3829	(new)	(new)
miriam@marinssdc.org	Miriam	Karell	929-272-3838	(new)	(new)
Jessa@foxandgoose.com	Jessa	Berkey	530-334-3757	(new)	(new)
joe@norcalssdc.org	Joe	Rodola	415-744-9411	(new)	(new)
MikeP@ShopOnThecorner.com	Mike	Packard	650-151-9830	(new)	(new)
pdegregoli@youtube.com	Penelope	De Gregoli	209-991-8002	(new)	(new)
sspraging1@de.vu	Sal	Spraging	707-123-0894	(new)	(new)
afbooks2@mtoseek.co.jp	Angelo	Fookes	925-616-3829	(new)	(new)
iconsidina3@vivia.com	Luisa	Considina	929-272-3838	(new)	(new)
aabramovitch4@samsung.com	Alic	Abramovitch	530-334-3757	(new)	(new)
mbabe5@sakura.ne.jp	Maynord	Babe	415-744-9411	(new)	(new)
taudenis6@quantcast.com	Tarrah	Audenis	650-151-9830	(new)	(new)
mami@manistesbdtchen.com	Mami	Nail	707-123-0894	(new)	(new)
bcbdc8@gmail.com	bobby	chang	925-616-3829	(new)	(new)

The system will return the status of the load. Click Continue

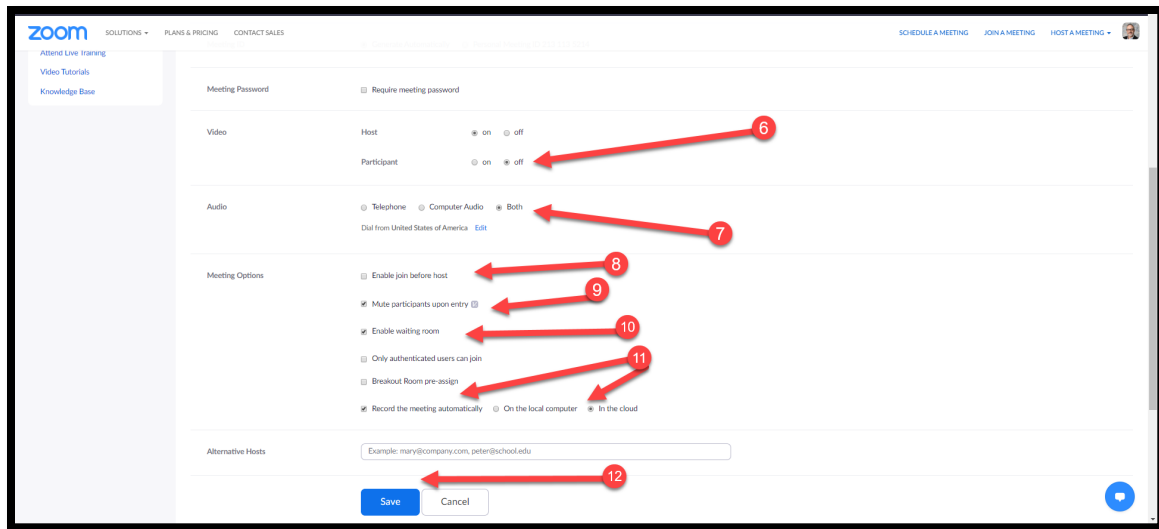
APPENDIX1

Zoom meeting Settings

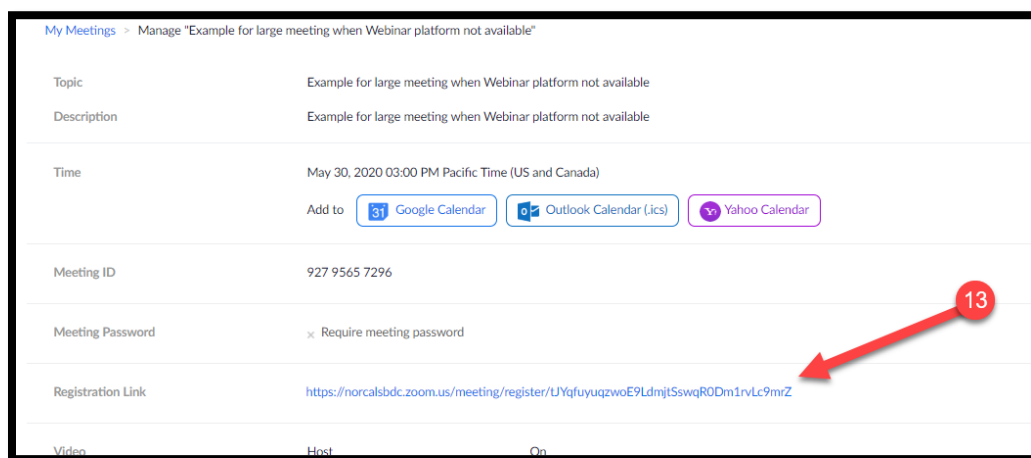
The screenshot shows the Zoom 'Schedule a Meeting' interface. On the left is a sidebar with navigation links: PERSONAL (Profile, Meetings, Webinars, Recordings, Settings), ADMIN (Dashboard, User Management, Room Management, Phone System Management, Account Management, Advanced), and links to Attend Live Training, Video Tutorials, and Knowledge Base. The main content area is titled 'My Meetings > Schedule a Meeting'. It contains the following fields and settings:

- Topic:** A text input field with the placeholder text 'Example for large meeting when Webinar platform not available'. A red arrow labeled '1' points to this field.
- Description (Optional):** A text input field with the same placeholder text. A red arrow labeled '2' points to this field.
- When:** A date and time selector showing '05/30/2020' at '3:00 PM'. A red arrow labeled '3' points to this section.
- Duration:** A selector showing '1 hr 0 min'.
- Time Zone:** A dropdown menu showing '(GMT-7:00) Pacific Time (US and Canada)'.
- Recurring meeting:** An unchecked checkbox.
- Registration:** A checked checkbox labeled 'Required'. A red arrow labeled '4' points to this checkbox.
- Meeting ID:** Two radio buttons: 'Generate Automatically' (selected) and 'Personal Meeting ID 213 113 5214'. A red arrow labeled '5' points to the 'Generate Automatically' option.
- Meeting Password:** An unchecked checkbox labeled 'Require meeting password'.
- Video:** Two sections, 'Host' and 'Participant', each with 'on' and 'off' radio buttons.

1. Enter the title for the meeting **Topic**
2. Enter a short **Description**
3. Set the **time and date**. Note that the **duration** is really informational only, you won't get kicked off after the time finishes
4. Ensure that **Registration** is SELECTED.
5. Ensure you don't use your Personal Meeting ID but instead select **Generate Automatically**



6. Select **Participant Video** OFF Although they will normally be able to turn this on themselves in the meeting,
7. Ensure that the **Both** audio option is selected
8. Turn off Join before host
9. Select **Mute participants upon entry**. Although they will normally be able to unmute themselves in the meeting, you as host will have the ability to stop them though setting inside the meeting.
10. Using a **waiting room** allows you to only let in your presenters before the meeting is due to start. You can turn off the waiting room one the meeting starts properly
11. We recommend that you **Record the meeting automatically** to the **Cloud** After the meeting you will be able to upload the recording to our Vimeo platform for sharing.
12. Click **Save**



13. Copy the **Registration Link** Here

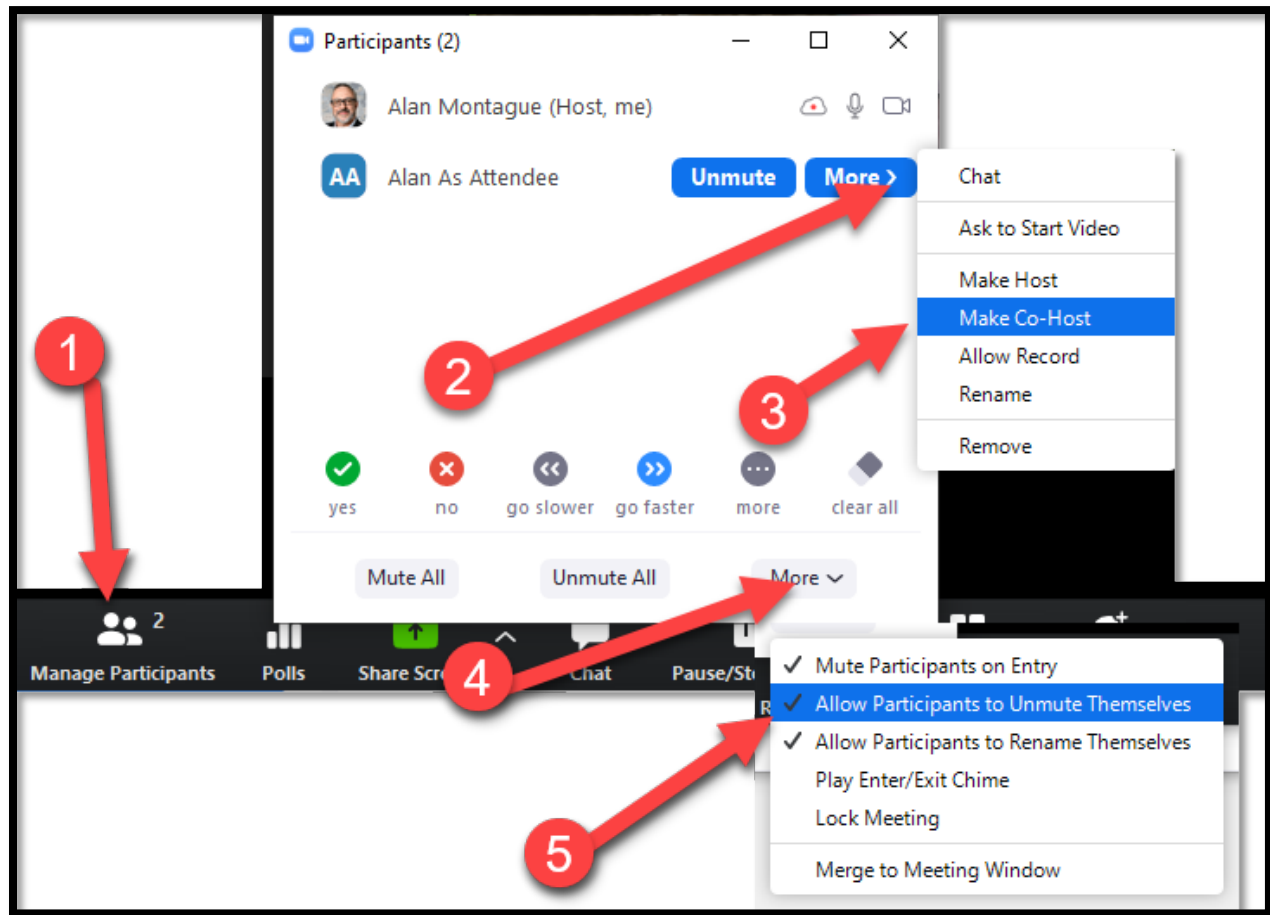
This is what you will share with your presenters in an invitation and use in NeoSerra for the Registration URL

Now follow steps 5,6,7,8 & 10 from the Webinar settings to set the registration questions and email options.

In Meeting settings for maximum control

When you start the meeting before your attendees start arriving do the following

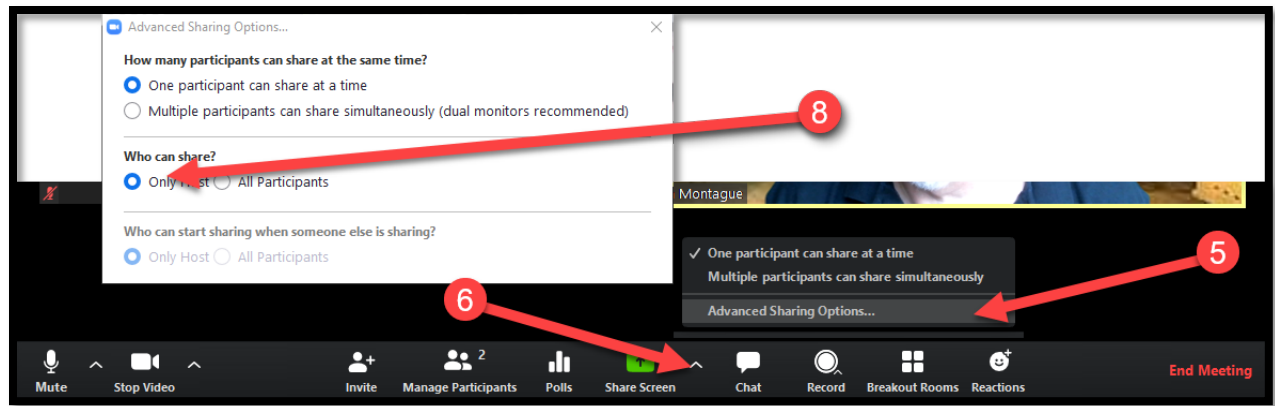
Promote any presenters to Co-Hosts



1. Click **Manage Participants**
2. Next to the Presenter click **More**
3. Click **Make Co-Host**

Stop non hosts from unmuting themselves

4. Click **More**
5. Click **Allow Participants to Unmute Themselves** to deselect it



Stop people other than the host and co-hosts from sharing screens

6. To the right of the Screen Share button click the up arrow
7. Select **Advanced Sharing Options**
8. Select **Only Host** can shareAppendix 2 of this document.

Appendix 2

Disclaimer Language

The following language MUST be added to all Lead Center webinars. (Including Restaurant Program and Finance Center)

Centers are advised to contact their host for similar language to add to their own webinar.

Webinar Disclaimer Language – for webinar sign up page

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Short Webinar Disclaimer Language

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For the first page of slide decks

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