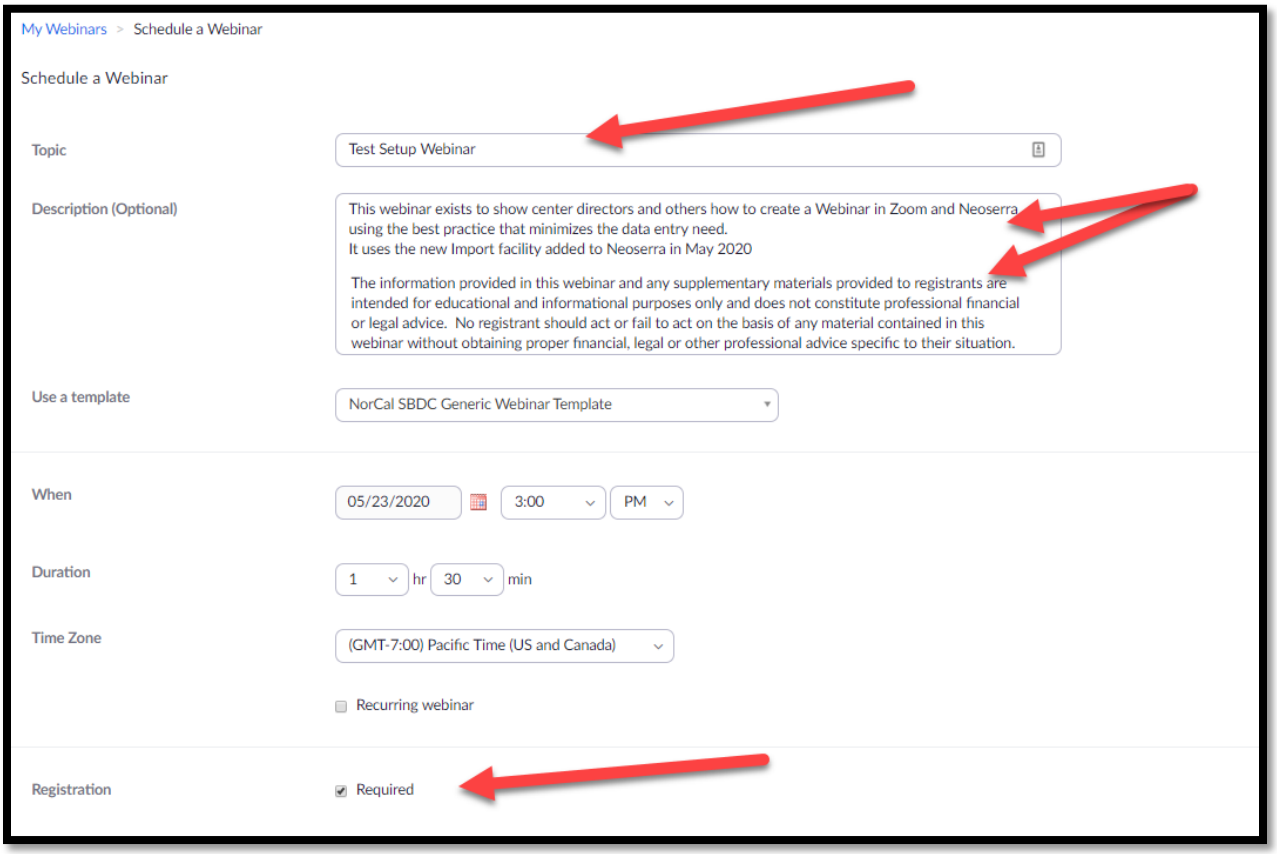
How to add a Webinar to Zoom & NeoSerra

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

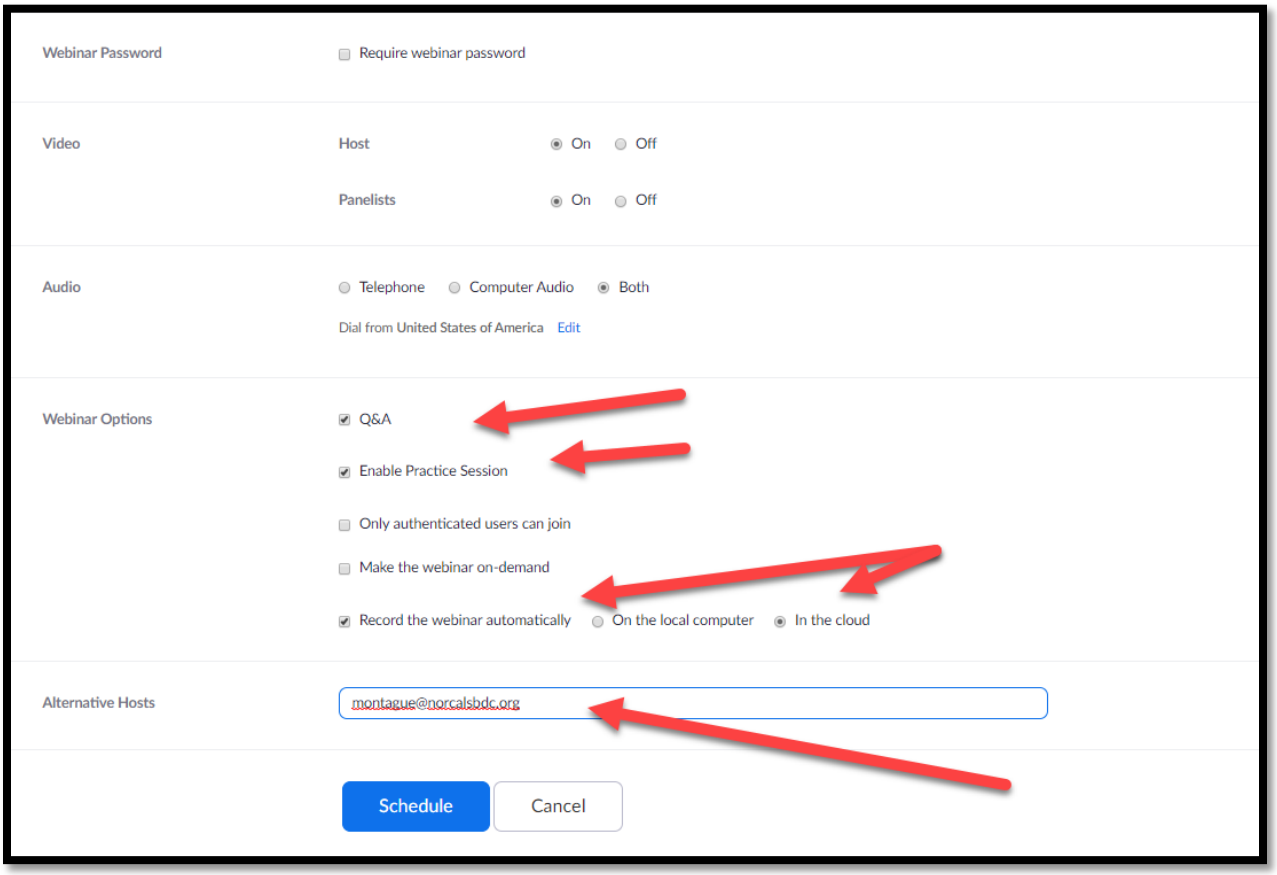
These instructions have been revised to take advantage of the new facility in NeoSerra that allows us to upload attendee information from Zoom. This has allowed us to simplify the registration and reminders process significantly without compromising the data collection we need to provide to our funders.

Setting up the Event

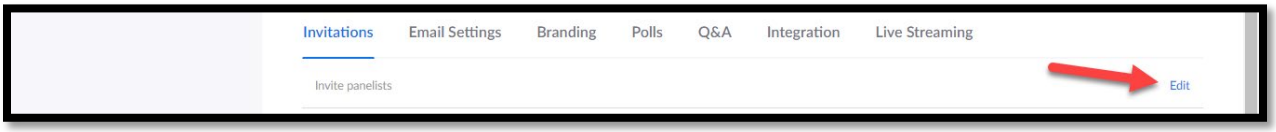
Step #	Where	What
1		Gather details of the webinar. Description, Time & Date, Presenter, Host
2	Zoom	Create Webinar in Zoom Add the description including the disclaimer text as defined in Appendix 2 of this document. Ensure that Registration checked

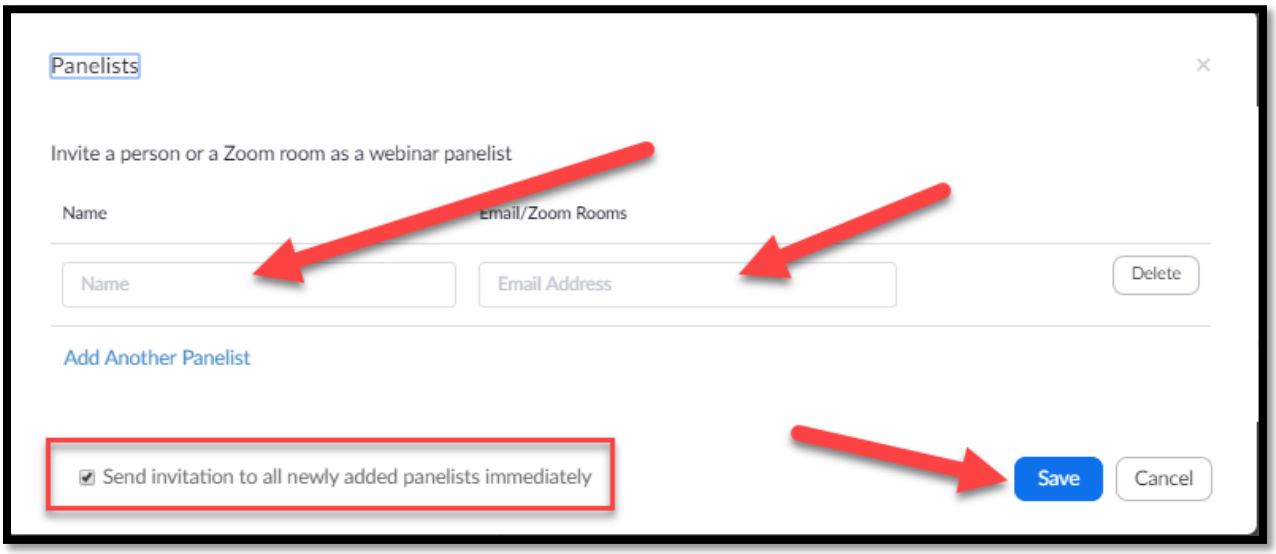


3	Zoom	Check Q&A, Enable Practice Session, Record the webinar automatically. In the Cloud If you have a colleague with a zoom account from the same source as you, who will be helping you with the webinar, then consider adding them as an Alternate Host

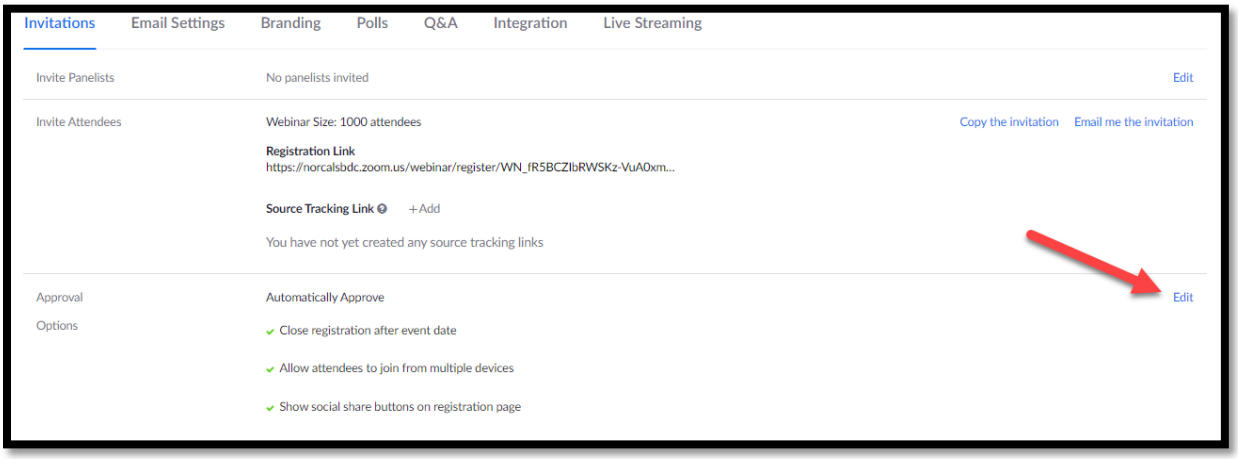


4	Zoom	On Invitations Tab: Invite Presenter as Panelist

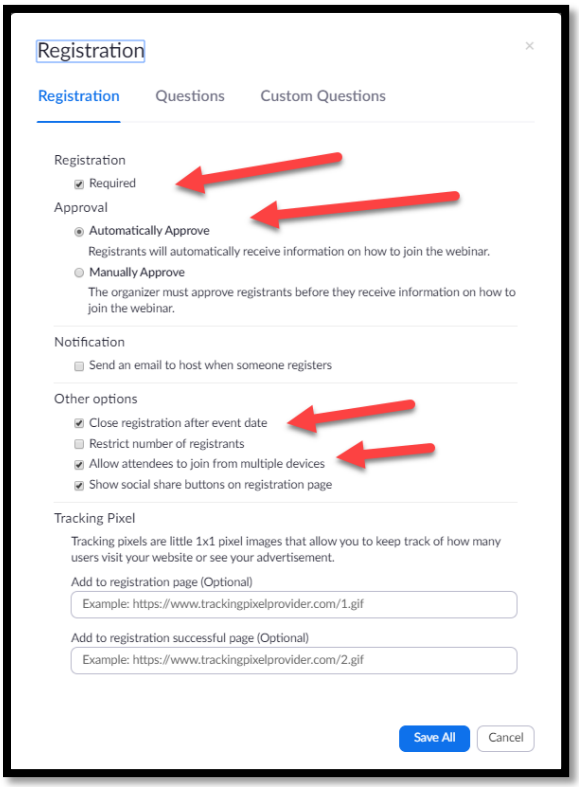


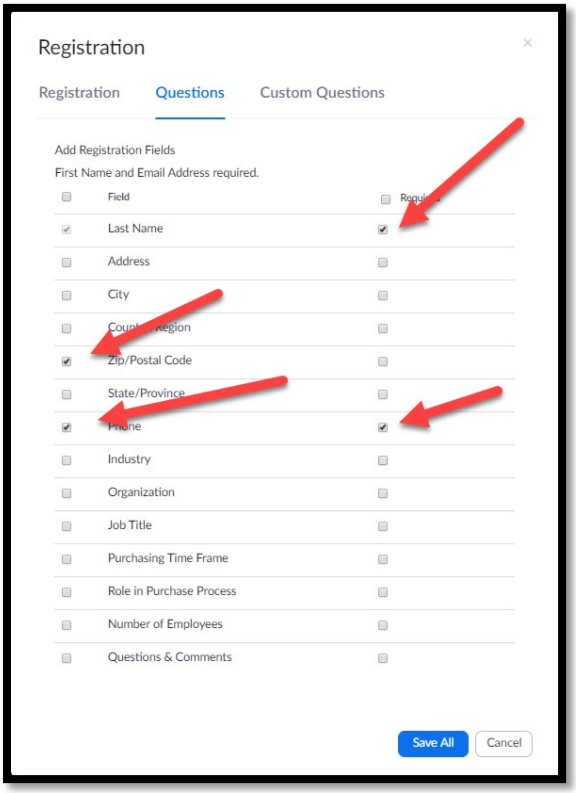


5	Zoom	On the invitations tab click Edit to the right of the Approval Options to access the Registation options

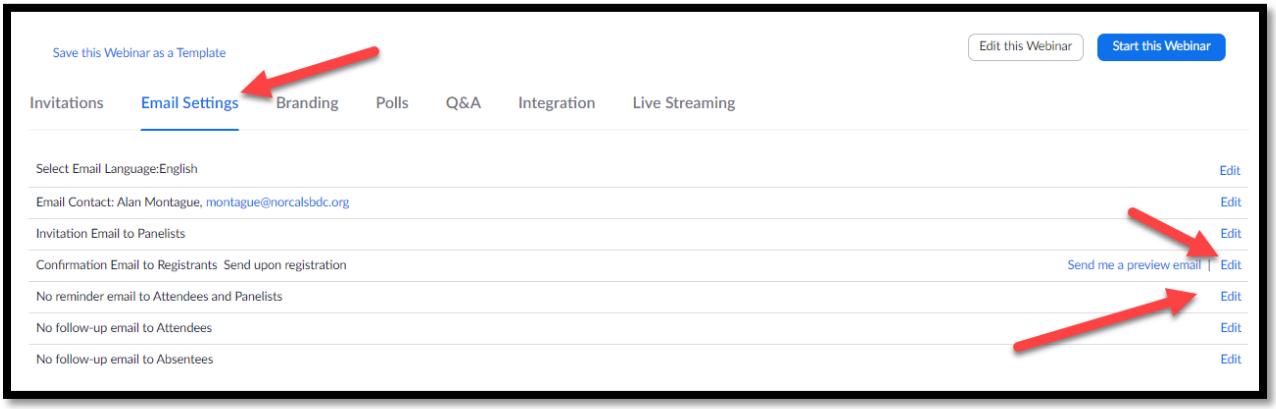


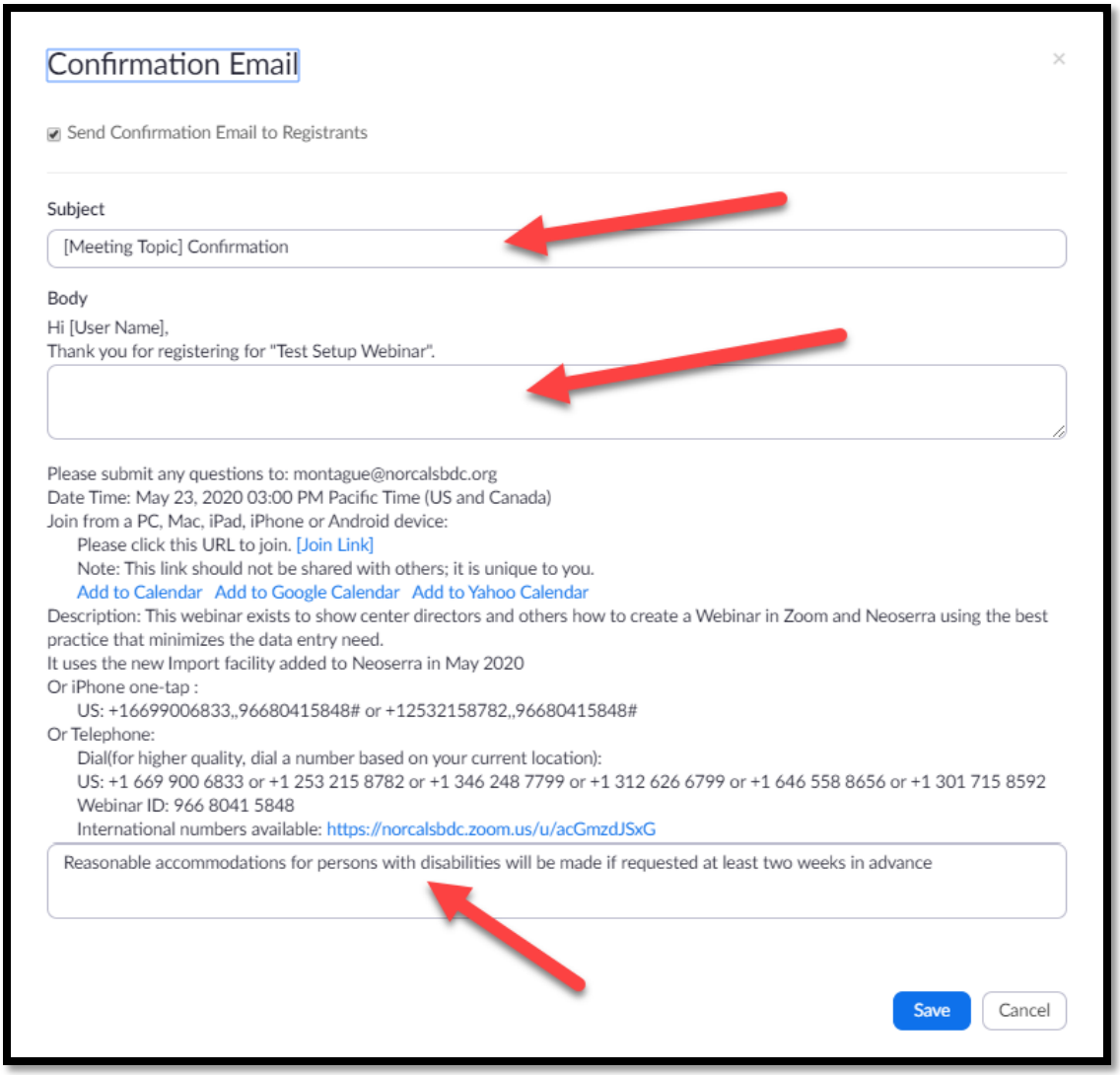
6	Zoom	On the Registration Tab: Ensure that Registration Required is checked along with Automatically Approve, Close registration after event date and Allow attendees to join from multiple devices
7	Zoom	On the Questions Tab: Make Last Name and Phone Number required fields, add Zip/Postal Code (not required)



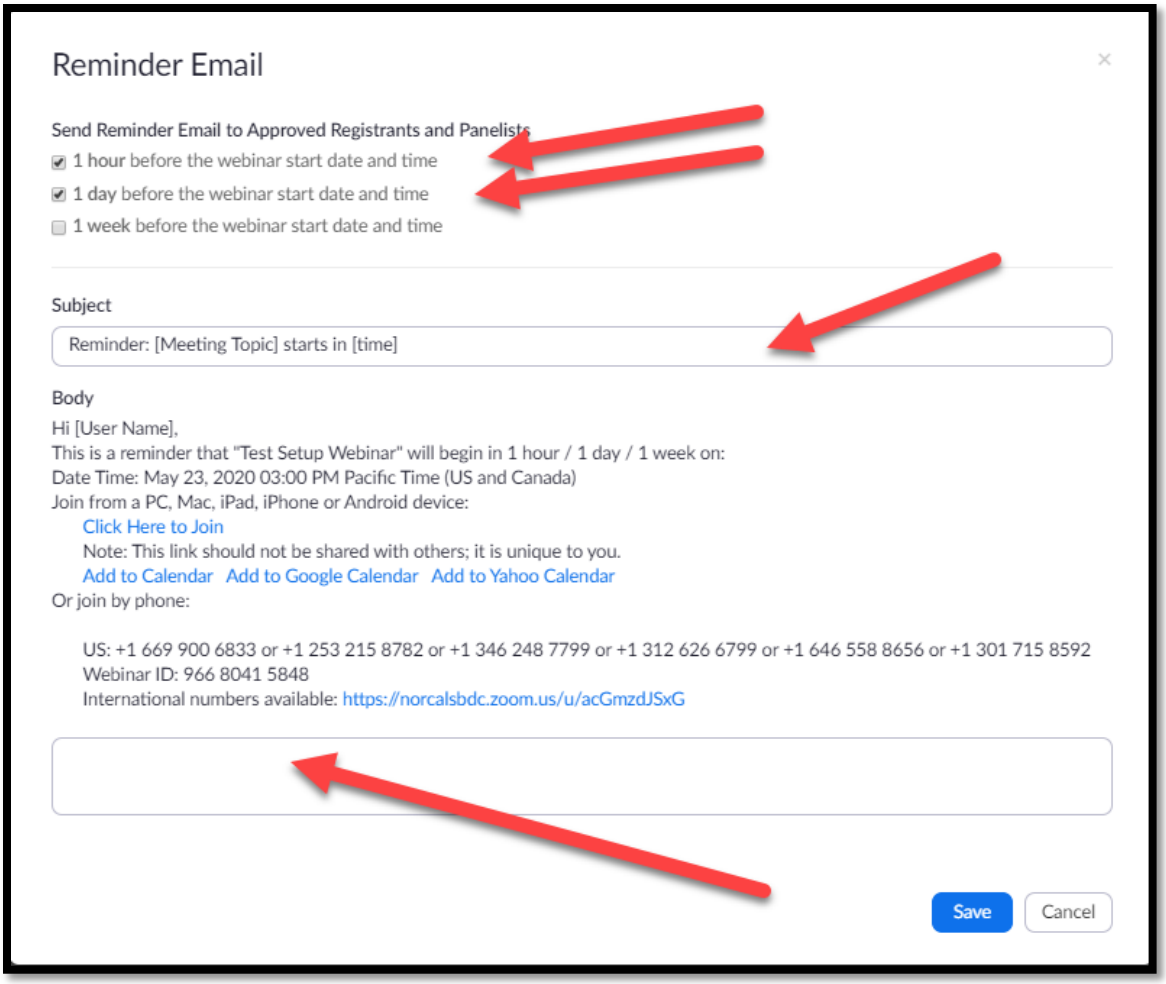


8	Zoom	On the email Settings tab: If you want to customize the registration confirmation click Edit then make your changes. Include the ADA disclaimer language following as part of the additional text **Reasonable accommodations for persons with disabilities will be made if requested at least two weeks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

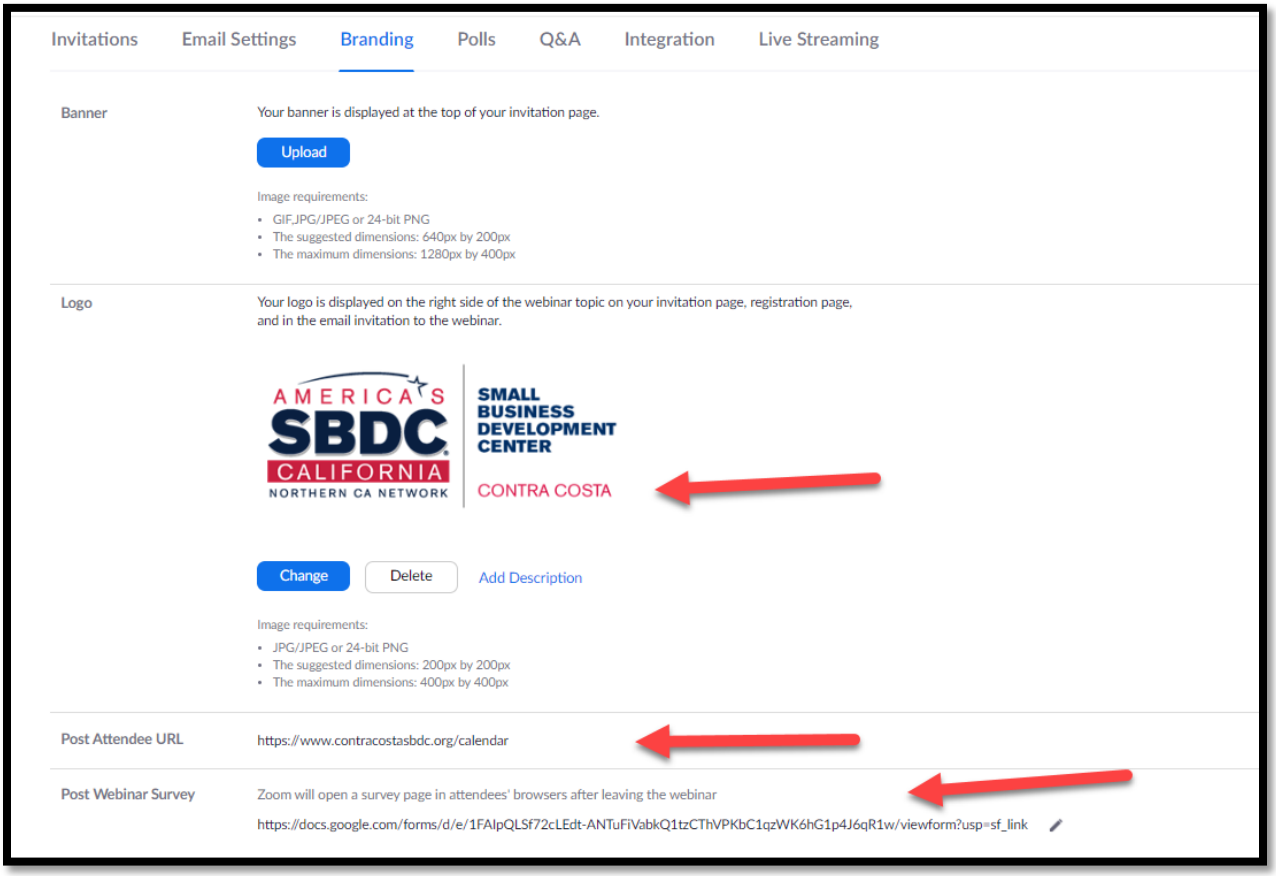




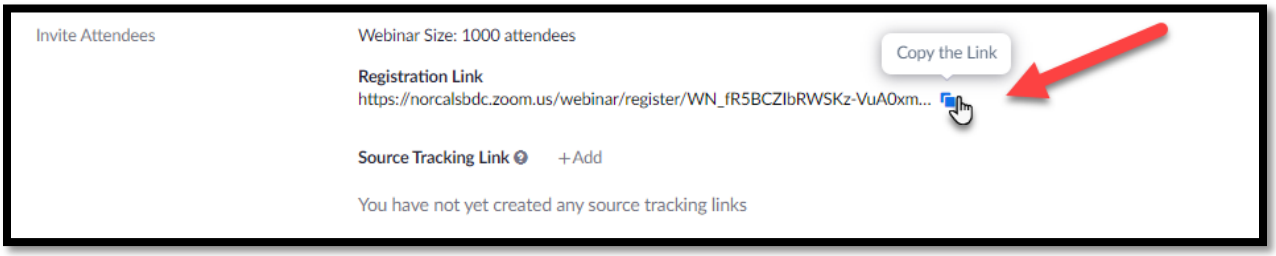
9	Zoom	Back to the email Settings tab, click the Edit next to No reminder email to Attendees and Panelists then select reminders for 1 hour and 1 day before the webinar start time. You can also add any extra information you want to the email.



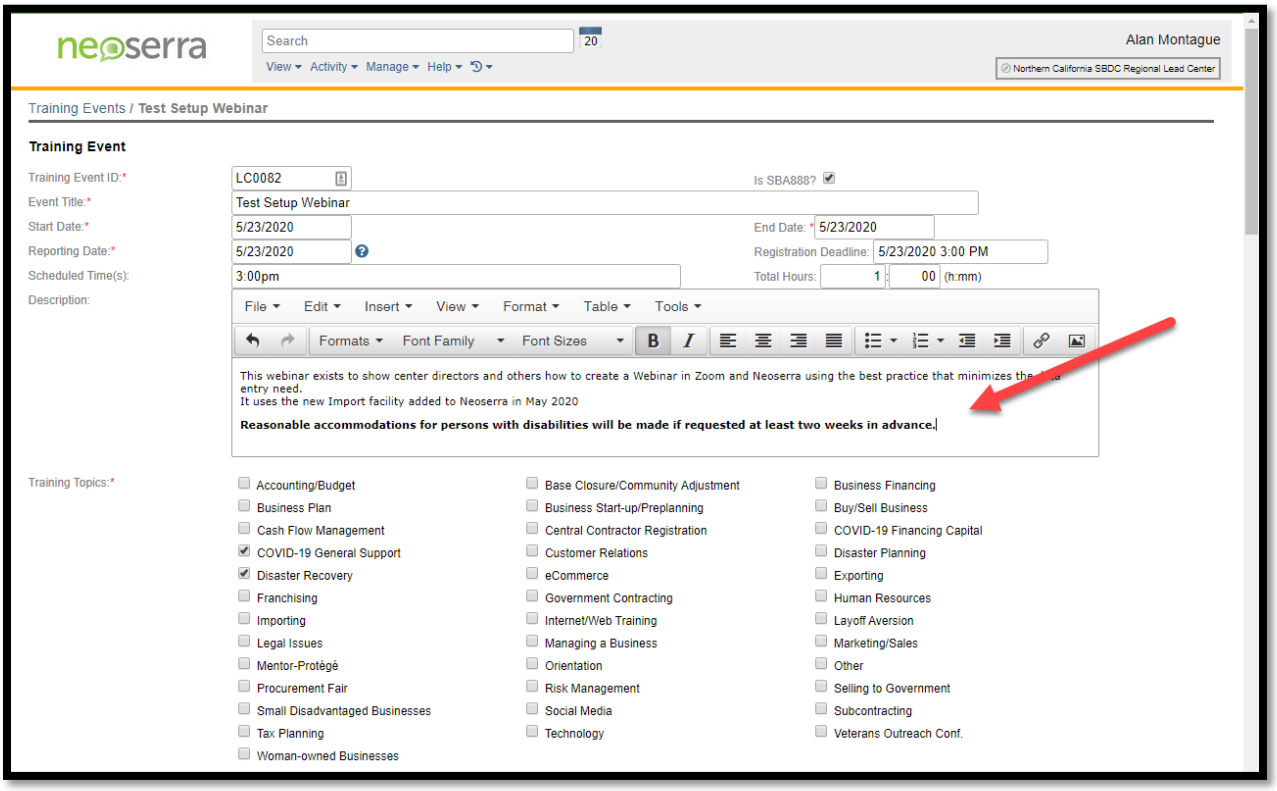
10	Zoom	On Branding Tab: Upload your center or program logo, Set post Attendee URL to your center URL. If you have a Google Form feedback sheet set up add the URL for that as the Post Webinar Survey (see instructions later for how to do this)



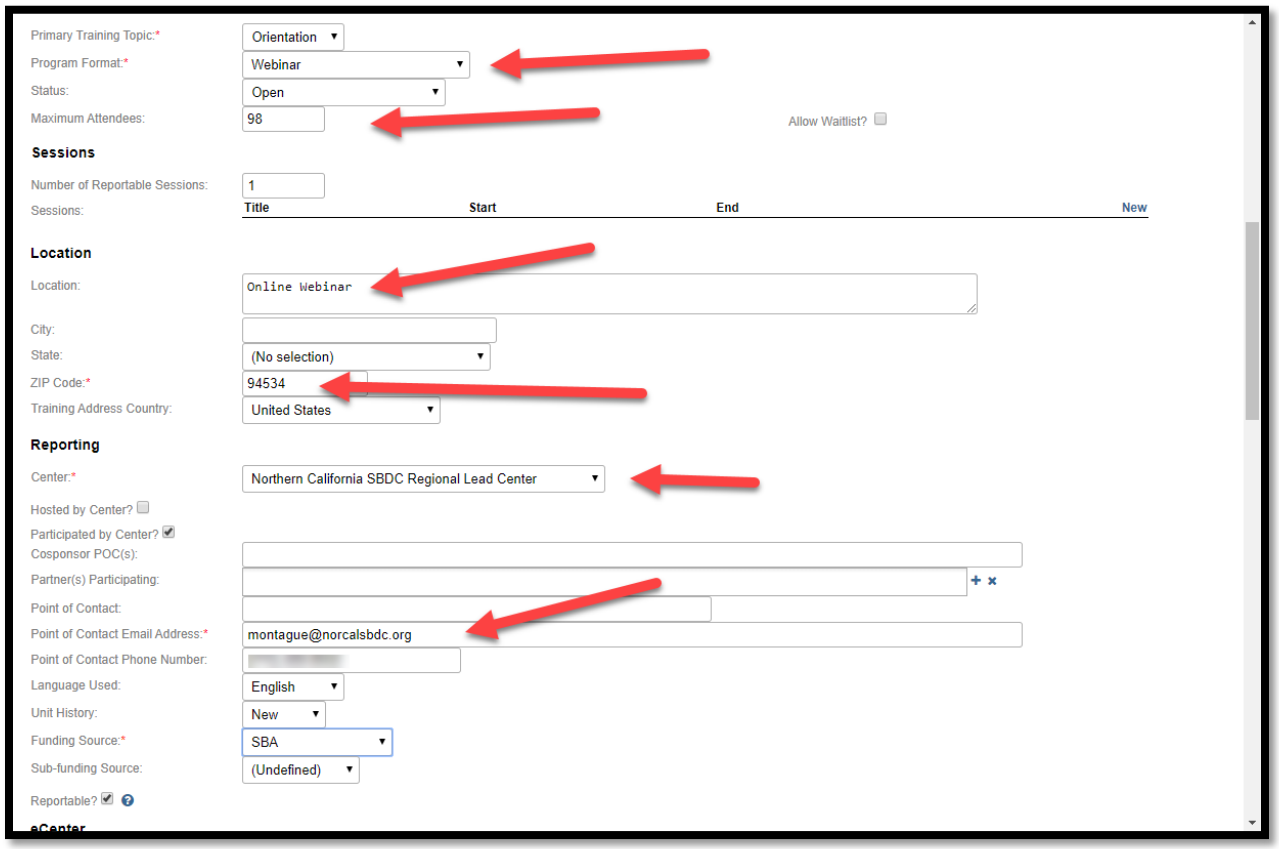
11	Zoom	Back on the Invitations tab: Copy the Registration Link

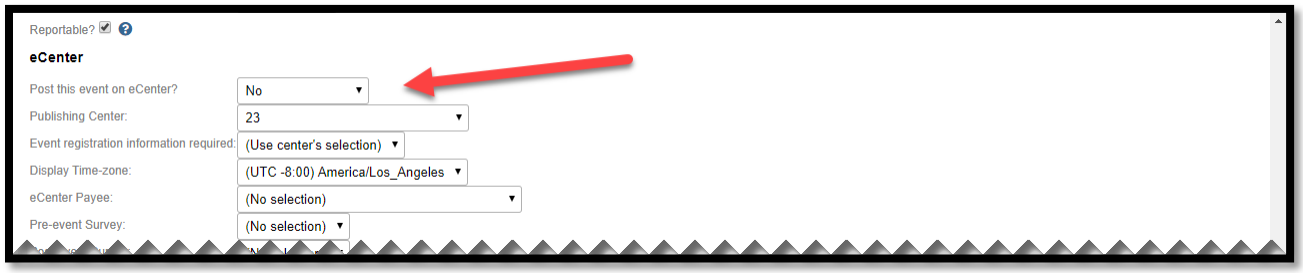


12	NeoSerra	Add event to NeoSerra Include the ADA disclaimer language following as part of the description **Reasonable accommodations for persons with disabilities will be made if requested at least two weeks in advance**. [add contact information for the event]



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





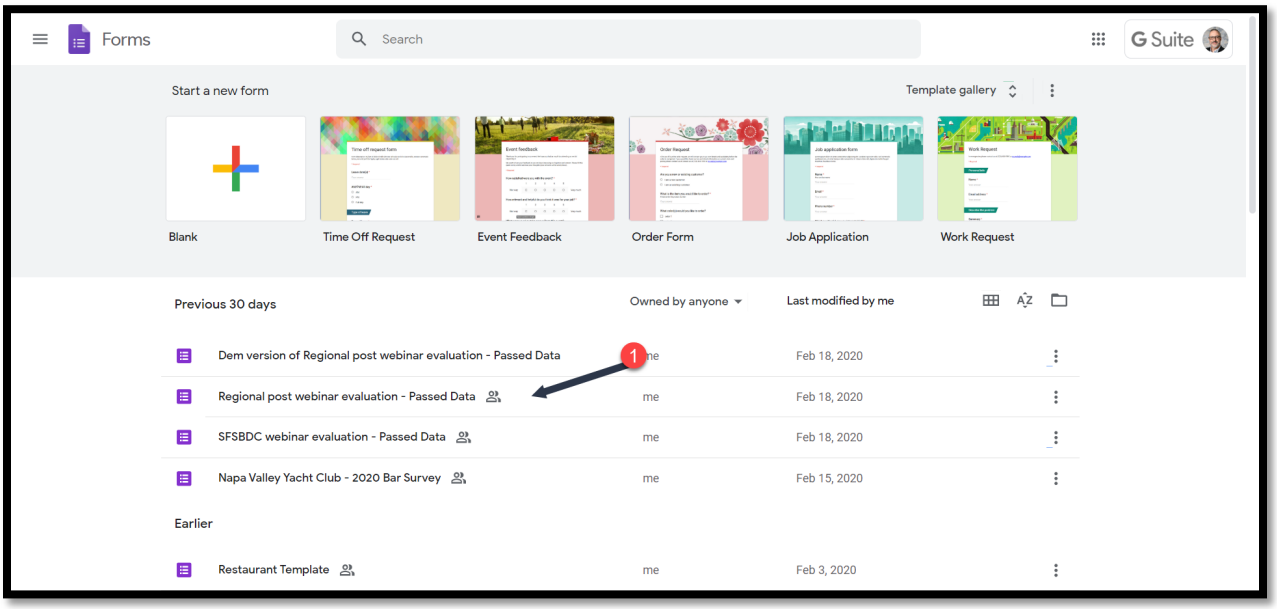
14	NeoSerra	Save the Training event

Creating a pre-populated online evaluation form.

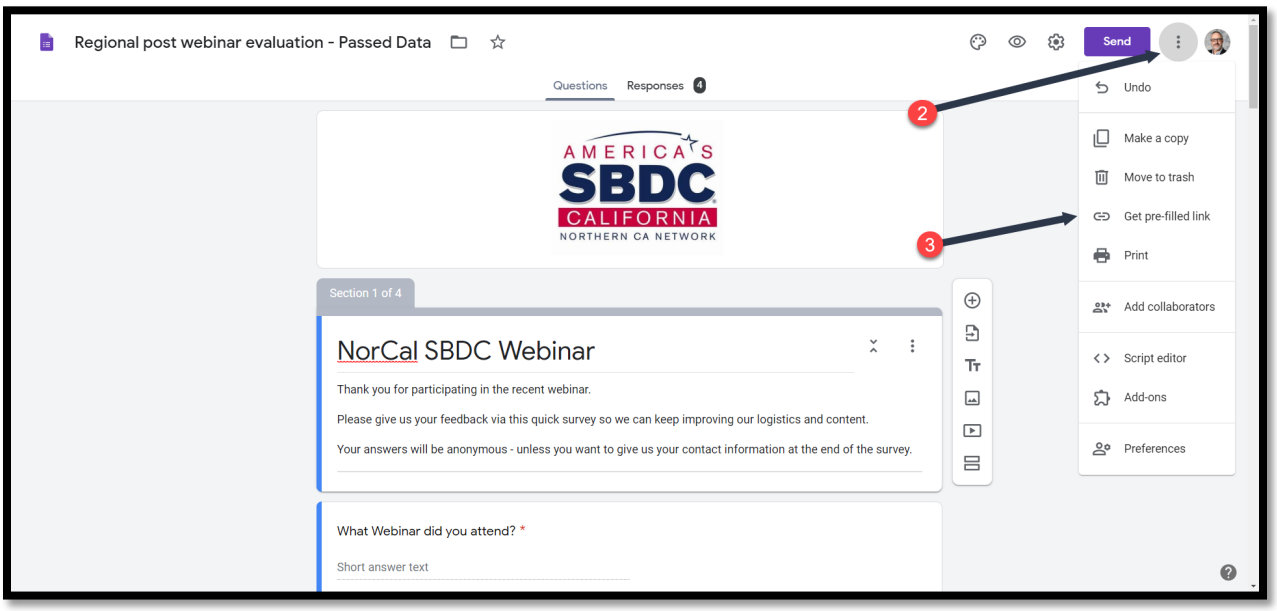
Contact Alan Montague at the lead center and ask him to share with you a copy of the google form used to get evaluations and feedback.

Once you have it follow these instructions.

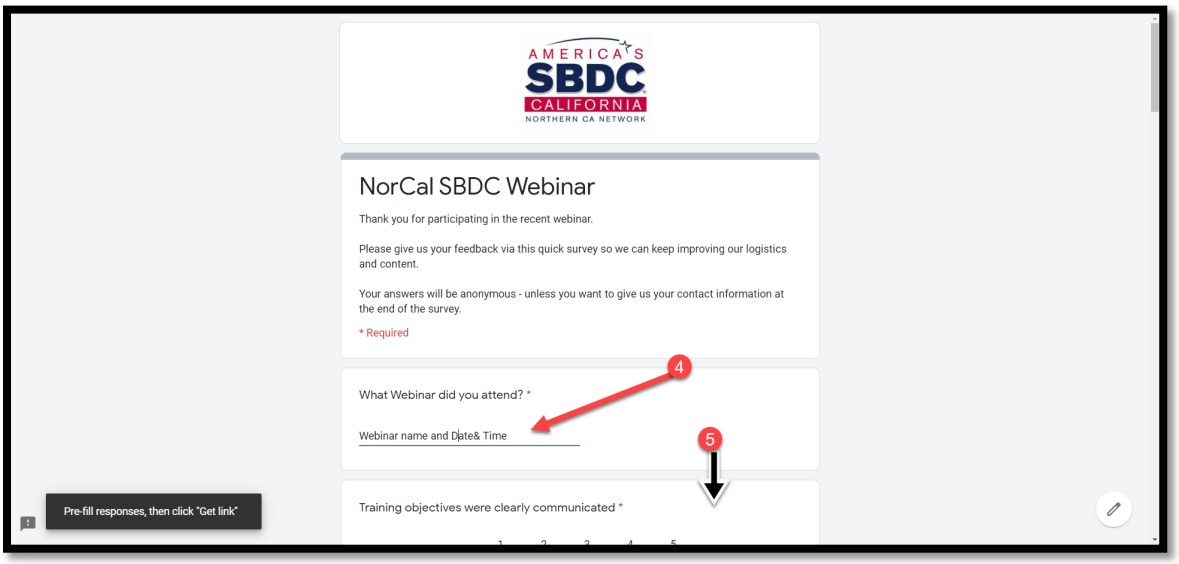
Open your Google Forms and select the form that you want to use.



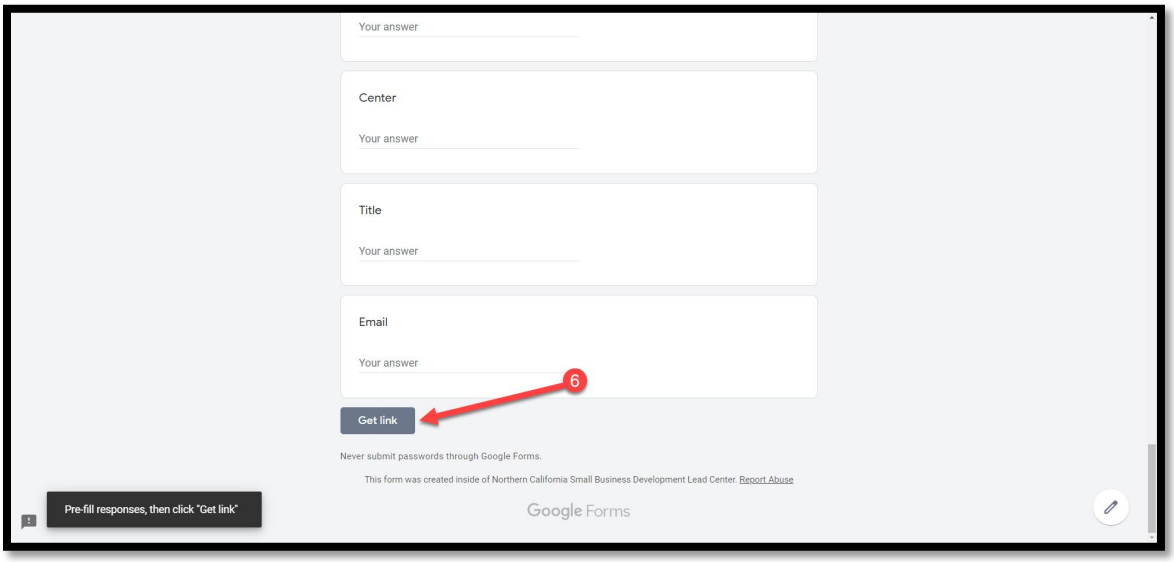
Use the menu to select 'Get pre-filled link'



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.



Click ‘Get Link’



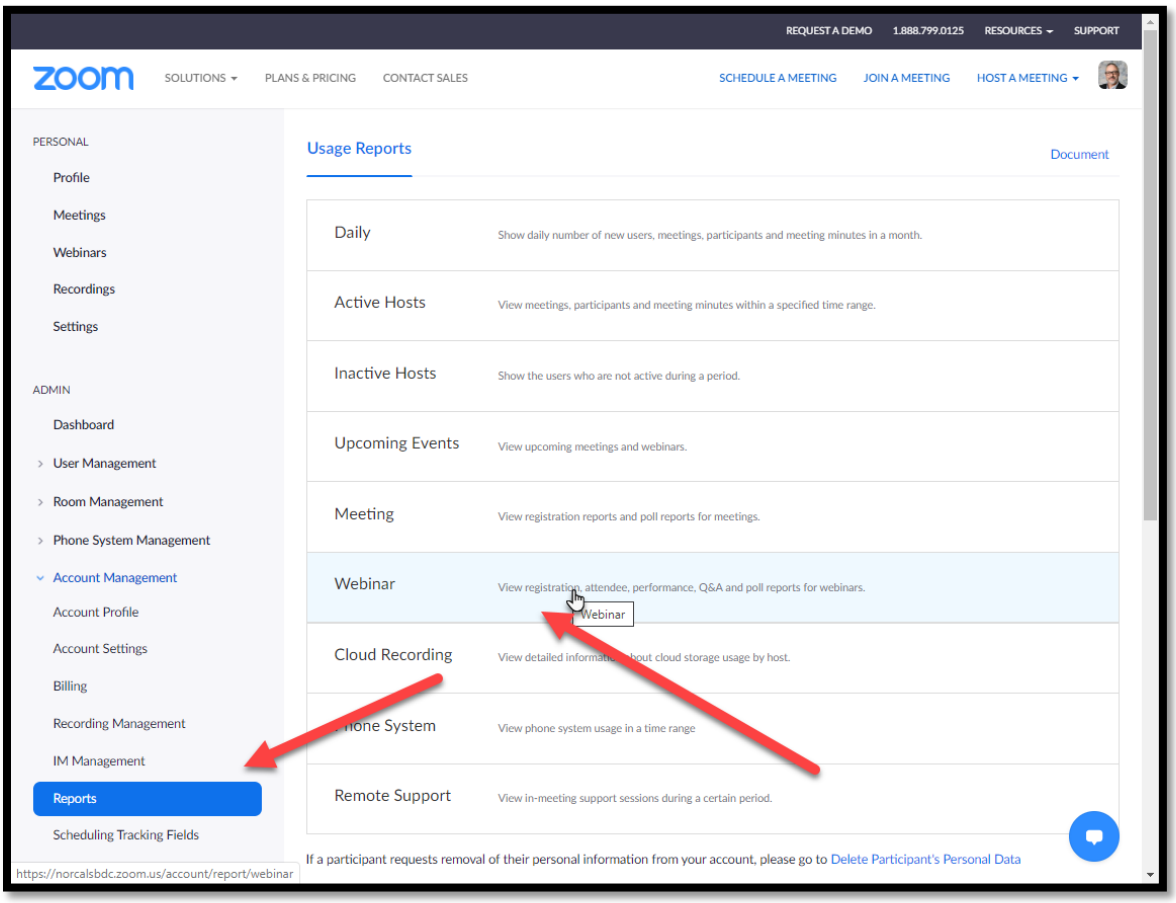
Click ‘COPY LINK’ to copy the link to your clipboard

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

Uploading the attendance information after the event

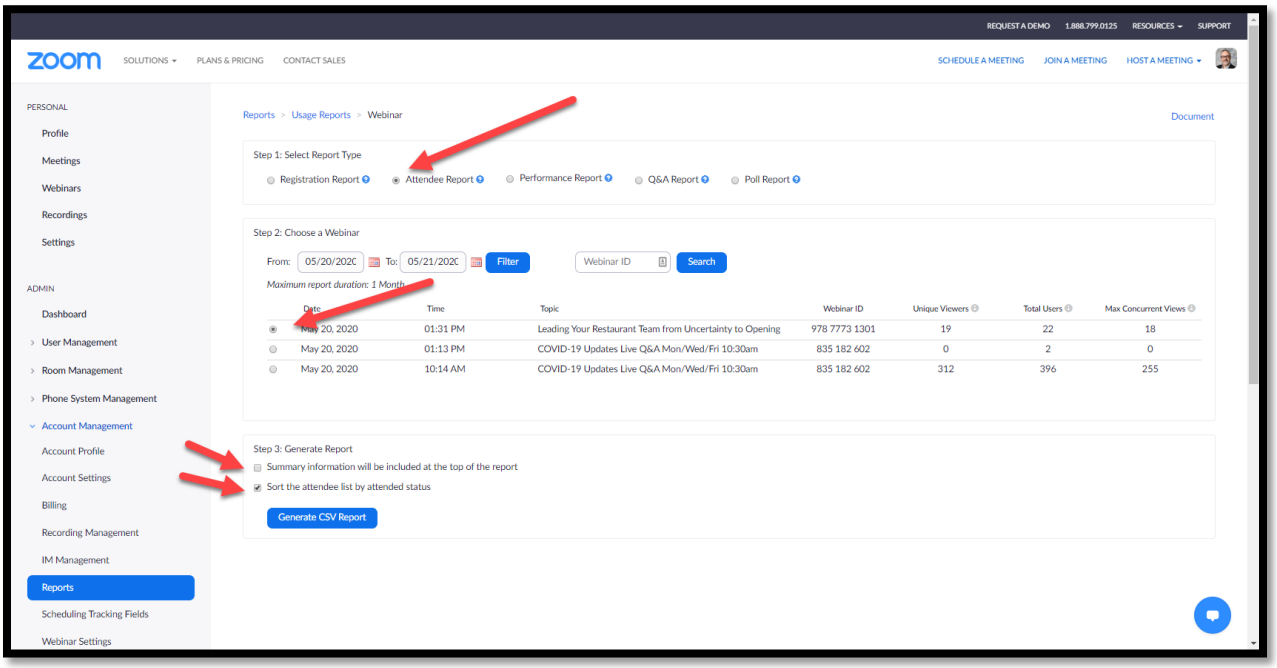
Once the webinar has run you can take the attendance report from Zoom and upload it into Neoserra.

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’

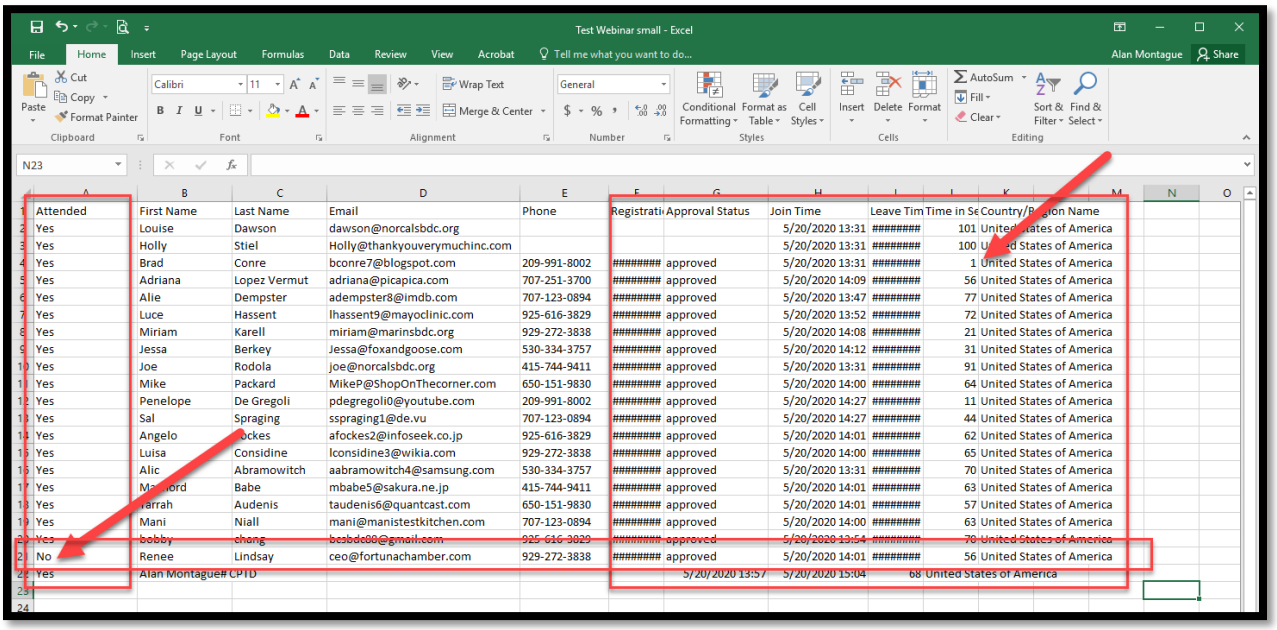
Then click Generate CSV Report



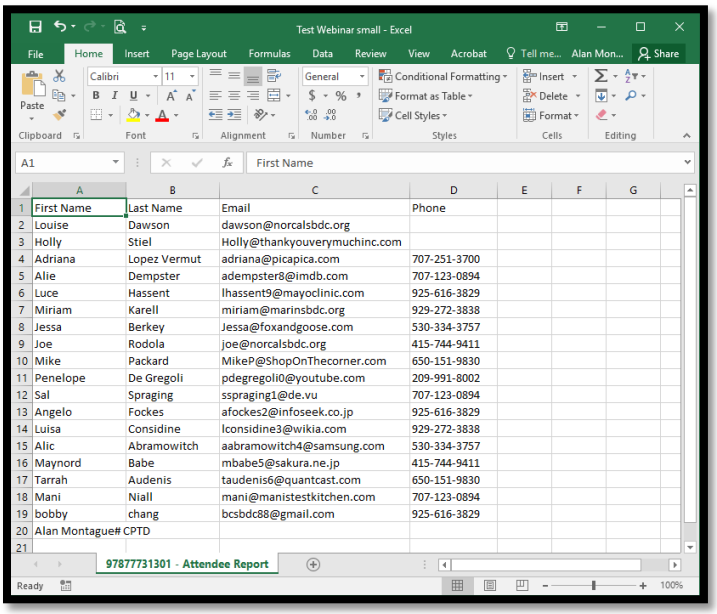
Open the file using excel

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 atttend (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	Registrati	Approval Status	Join Time	Leave Tim	Time in Se	Country/Region Name
Yes	Louise	Dawson	dawson@norcalsbdc.org				5/20/2020 13:31	########	101	United States of America
Yes	Holly	Stiel	Holly@thankyouverymuchinc.com				5/20/2020 13:31	########	100	United States of America
Yes	Brad	Conre	bconre7@blogspot.com	209-991-8002	########	approved	5/20/2020 13:31	########	1	United States of America
Yes	Adriana	Lopez Vermut	adriana@picapica.com	707-251-3700	########	approved	5/20/2020 14:09	########	56	United States of America
Yes	Alie	Dempster	adempster8@imdb.com	707-123-0894	########	approved	5/20/2020 13:47	########	77	United States of America
Yes	Luce	Hassent	lhassent9@mayoclinic.com	925-616-3829	########	approved	5/20/2020 13:52	########	72	United States of America
Yes	Miriam	Karell	miriam@marinsbdc.org	929-272-3838	########	approved	5/20/2020 14:08	########	21	United States of America
Yes	Jessa	Berkey	Jessa@foxandgoose.com	530-334-3757	########	approved	5/20/2020 14:12	########	31	United States of America
Yes	Joe	Rodola	joe@norcalsbdc.org	415-744-9411	########	approved	5/20/2020 13:31	########	91	United States of America
Yes	Mike	Packard	MikeP@ShopOnThecorner.com	650-151-9830	########	approved	5/20/2020 14:00	########	64	United States of America
Yes	Penelope	De Gregoli	pdegregoli0@youtube.com	209-991-8002	########	approved	5/20/2020 14:27	########	11	United States of America
Yes	Sal	Spraging	sspraging1@de.vu	707-123-0894	########	approved	5/20/2020 14:27	########	44	United States of America
Yes	Angelo	Fockes	afockes2@infoseek.co.jp	925-616-3829	########	approved	5/20/2020 14:01	########	62	United States of America
Yes	Luisa	Considine	lconsidine3@wikia.com	929-272-3838	########	approved	5/20/2020 14:00	########	65	United States of America
Yes	Alic	Abramowitch	aabramowitch4@samsung.com	530-334-3757	########	approved	5/20/2020 13:31	########	70	United States of America
Yes	Maynord	Babe	mbabe5@sakura.ne.jp	415-744-9411	########	approved	5/20/2020 14:01	########	63	United States of America
Yes	Tarrah	Audenis	taudenis6@quantcast.com	650-151-9830	########	approved	5/20/2020 14:01	########	57	United States of America
Yes	Mani	Niall	mani@manistestkitchen.com	707-123-0894	########	approved	5/20/2020 14:00	########	63	United States of America
Yes	bobby	chang	bcsbdc88@gmail.com	925-616-3829	########	approved	5/20/2020 13:54	########	70	United States of America
No	Renee	Lindsay	ceo@fortunachamber.com	929-272-3838	########	approved	5/20/2020 14:01	########	56	United States of America
Yes	Alan Montague#	CPTD				5/20/2020 13:57	5/20/2020 15:04		68	United States of America

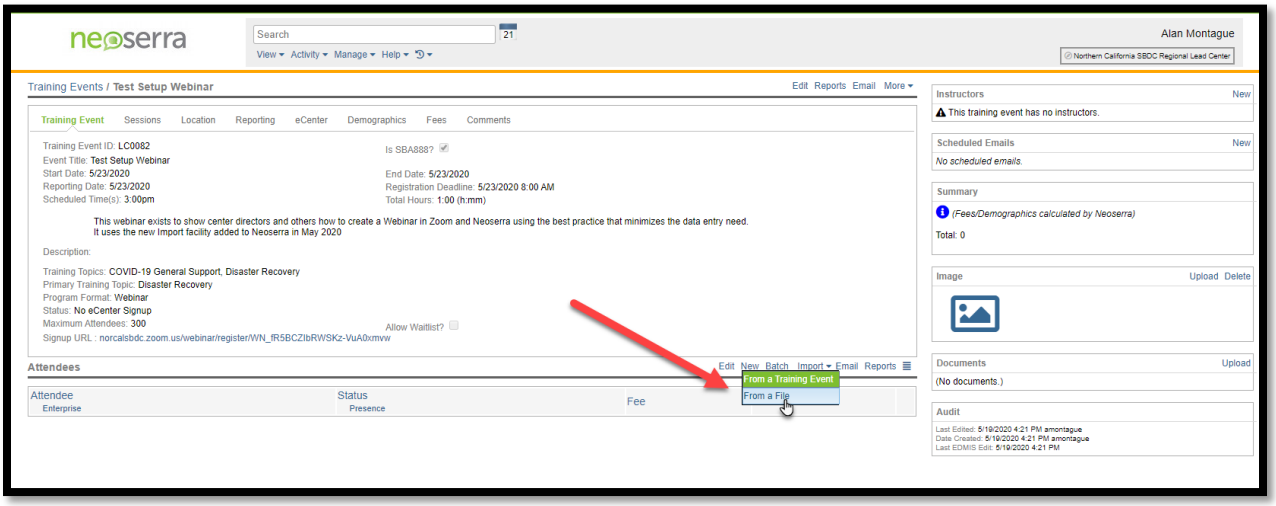


First Name	Last Name	Email	Phone
Louise	Dawson	dawson@norcalsbdc.org	
Holly	Stiel	Holly@thankyouverymuchinc.com	
Adriana	Lopez Vermut	adriana@picapica.com	707-251-3700
Alie	Dempster	adempster8@imdb.com	707-123-0894
Luce	Hassent	lhassent9@mayoclinic.com	925-616-3829
Miriam	Karell	miriam@marinsbdc.org	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	pdegregoli0@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
Maynord	Babe	mbabe5@sakura.ne.jp	415-744-9411
Tarrah	Audenis	taudenis6@quantcast.com	650-151-9830
Mani	Niall	mani@manistestkitchen.com	707-123-0894
bobby	chang	bcsbdc88@gmail.com	925-616-3829
Alan Montague#	CPTD		

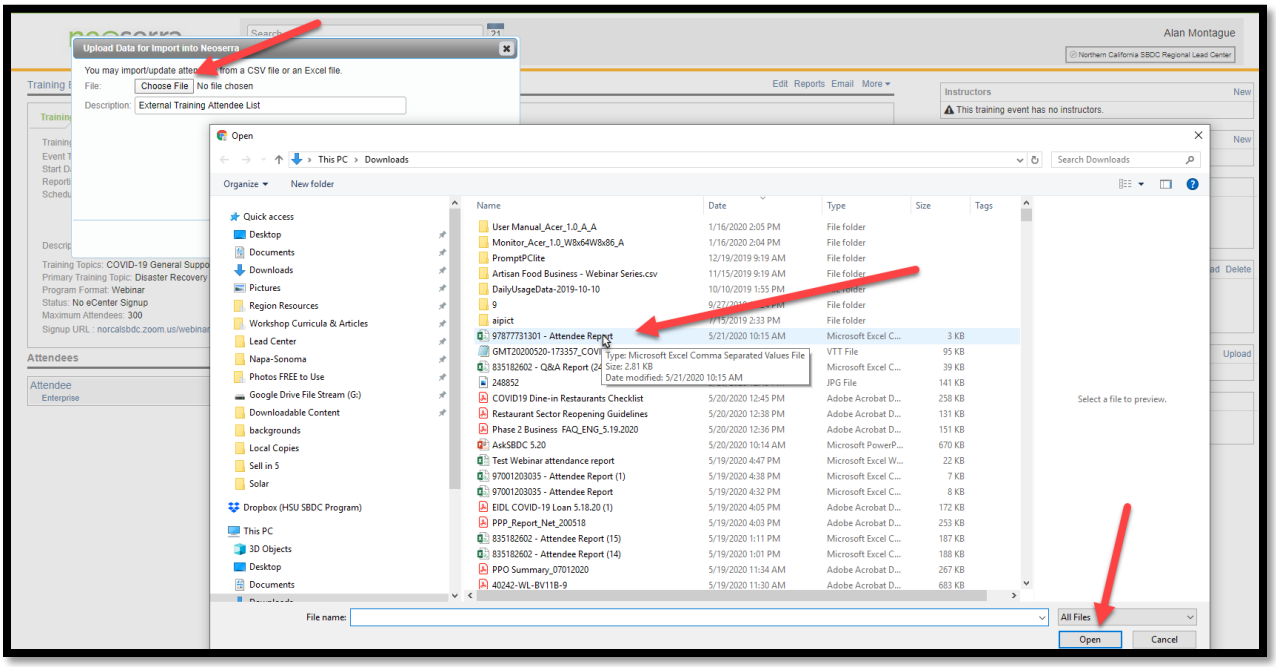
Save the file. We recommend saving it as an excel workbook.

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

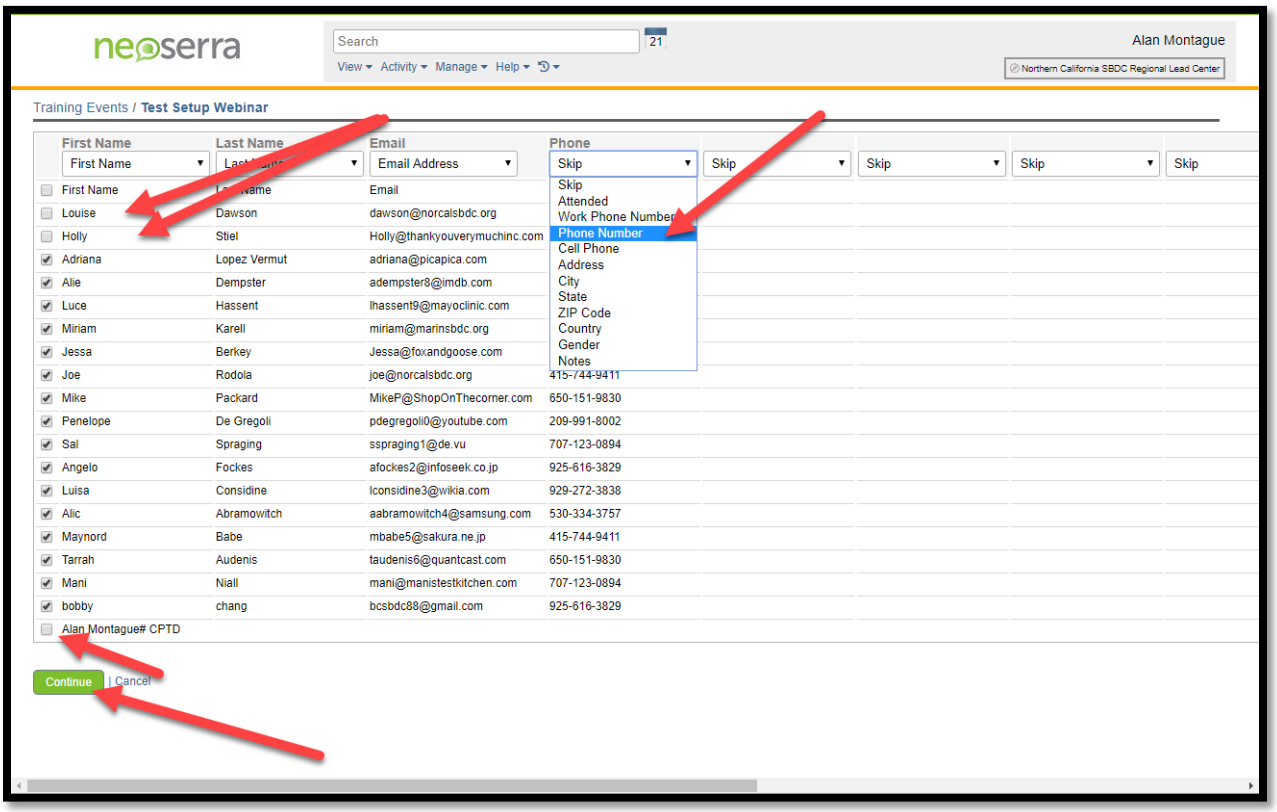


Click Choose file then navigate to the file you just cleaned up.



Ensure that any lines relating to presenters or hosts are unchecked (or remove them from the Excel file before you load it)

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.

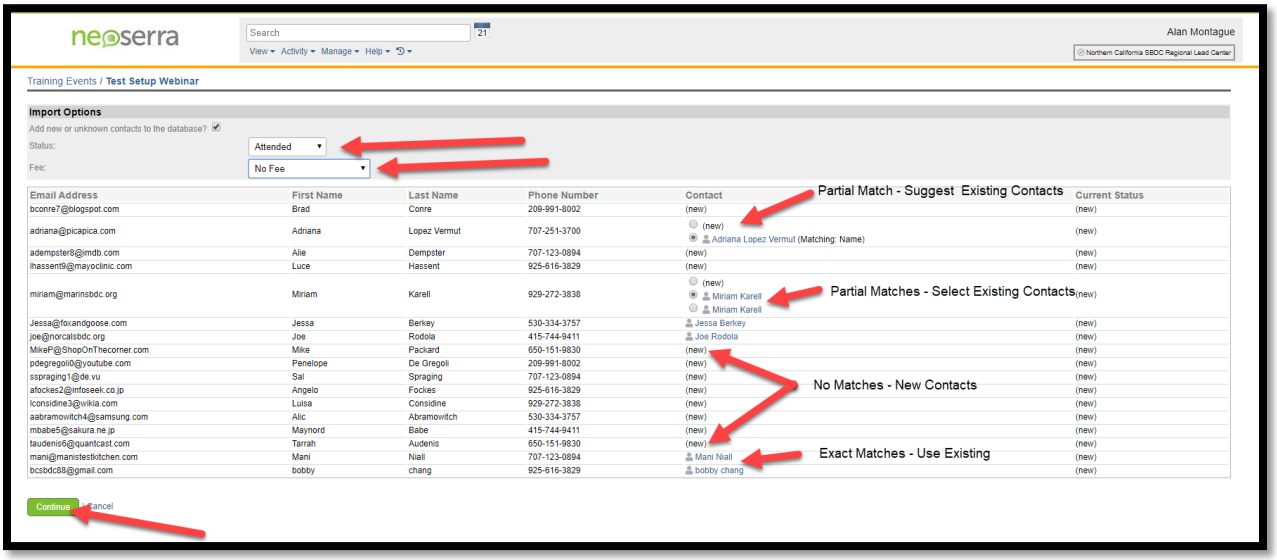


NeoSerra now tries to match the information in the file to existing contacts. For large files this may take some time.

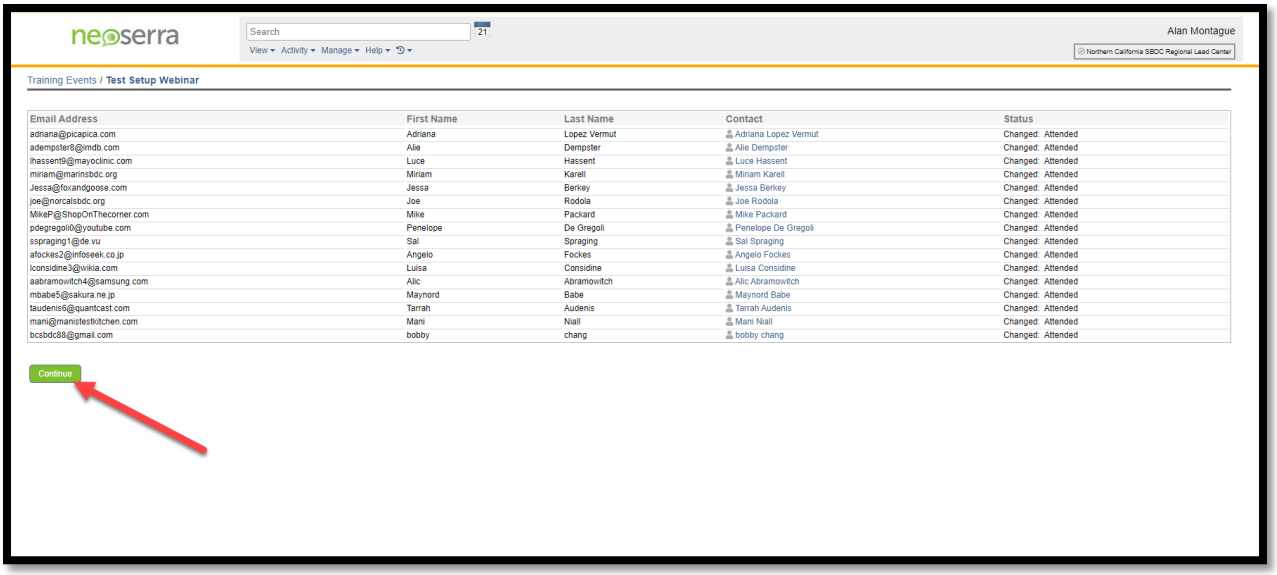
What Neoserra does next depends on how well the details on the uploaded file match the existing contacts in the system.

- 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 fins 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

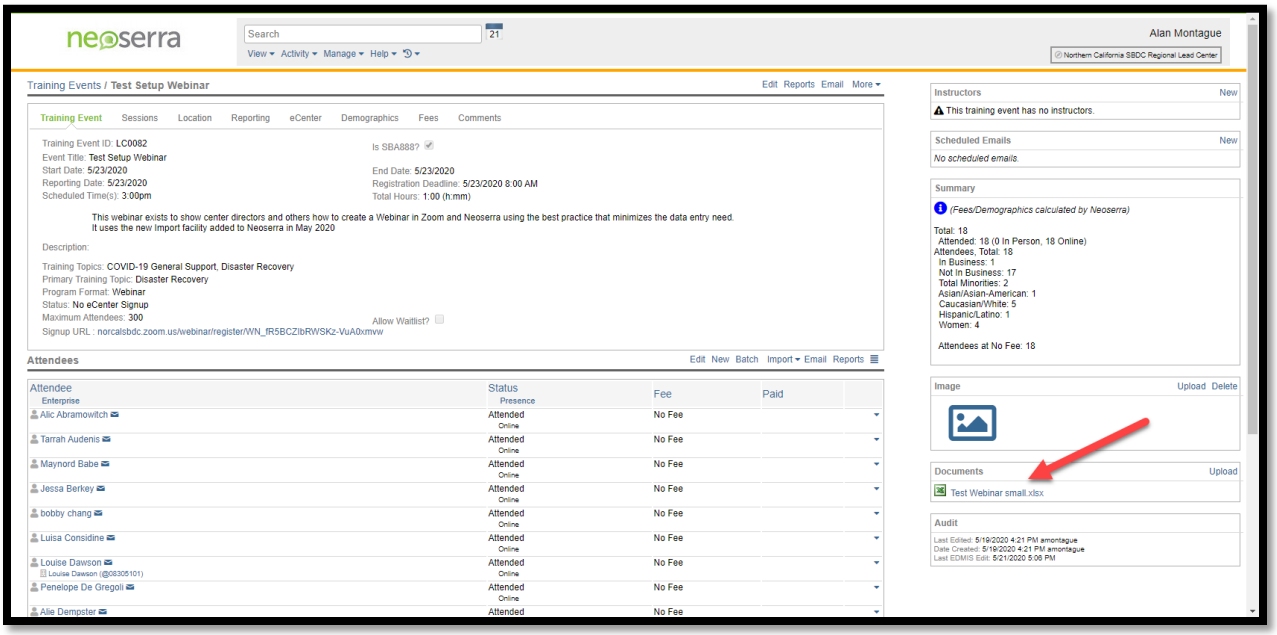


The system will return the status of the load. Click Continue

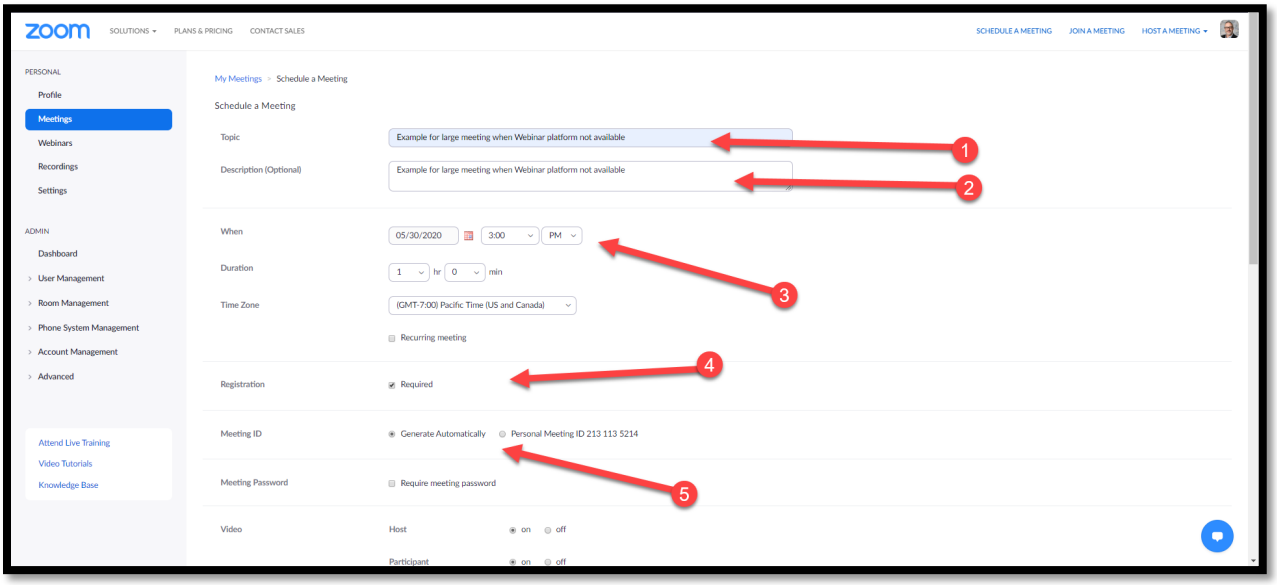


The Training event will return showing the newly added list of attendees as well as the demographics that it has for any of the previously existing contacts/clients.

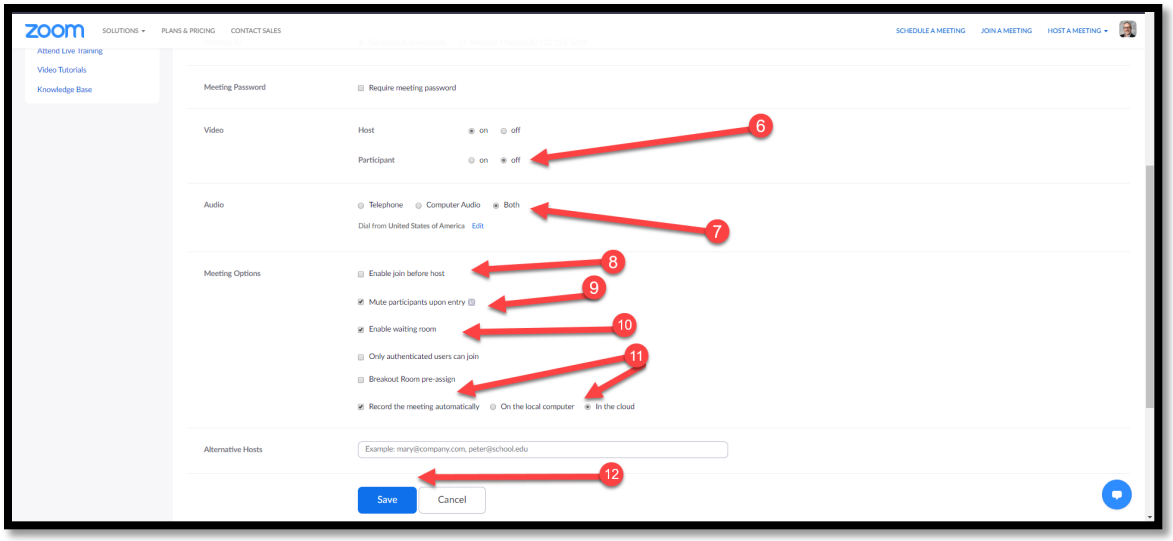
The uploaded file is attached as a document.



APPENDIX1
Zoom meeting Settings



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

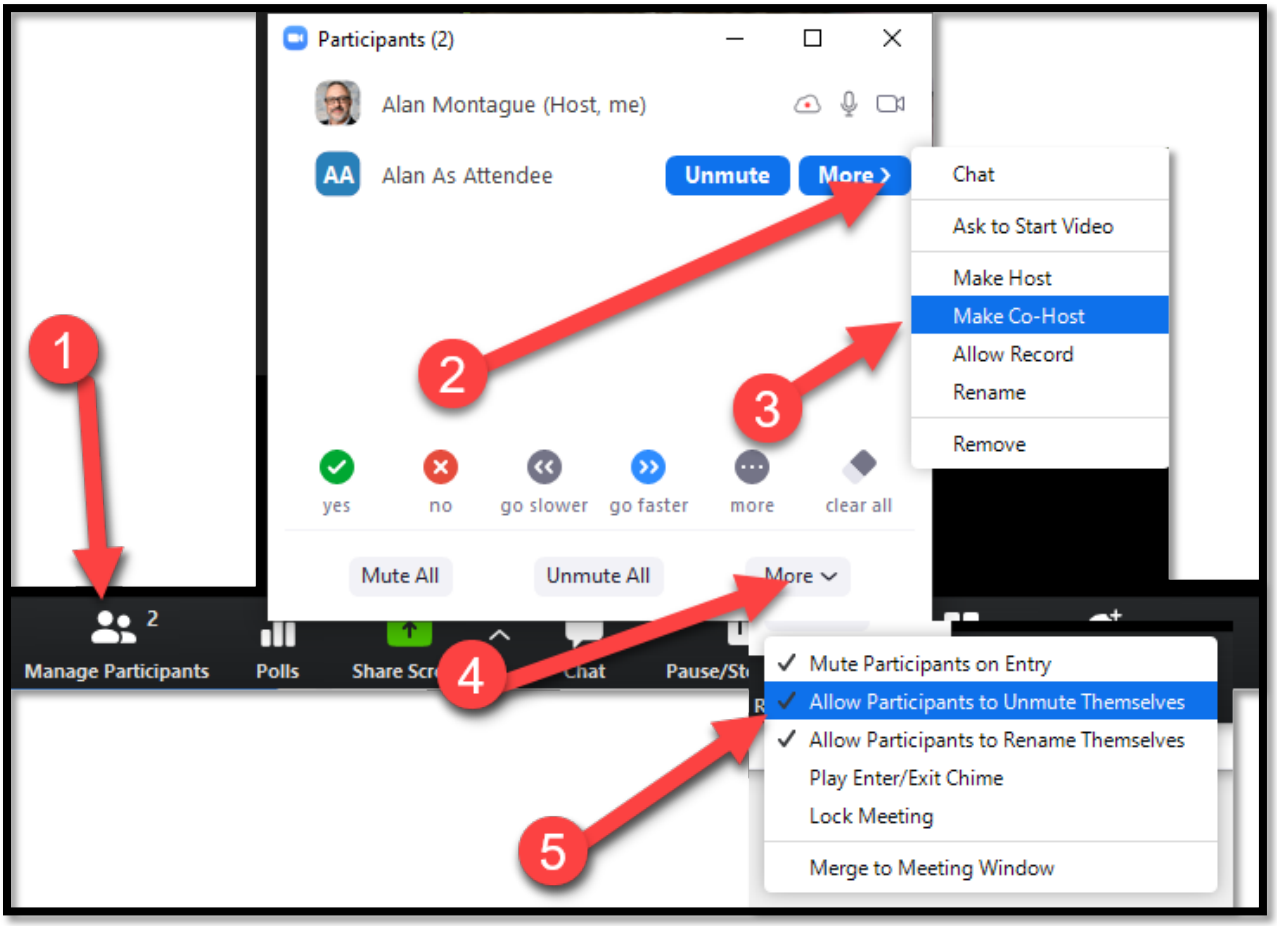
This is what you will share with your presenters in an invitation and use in NeoSerra for the Registration URL

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

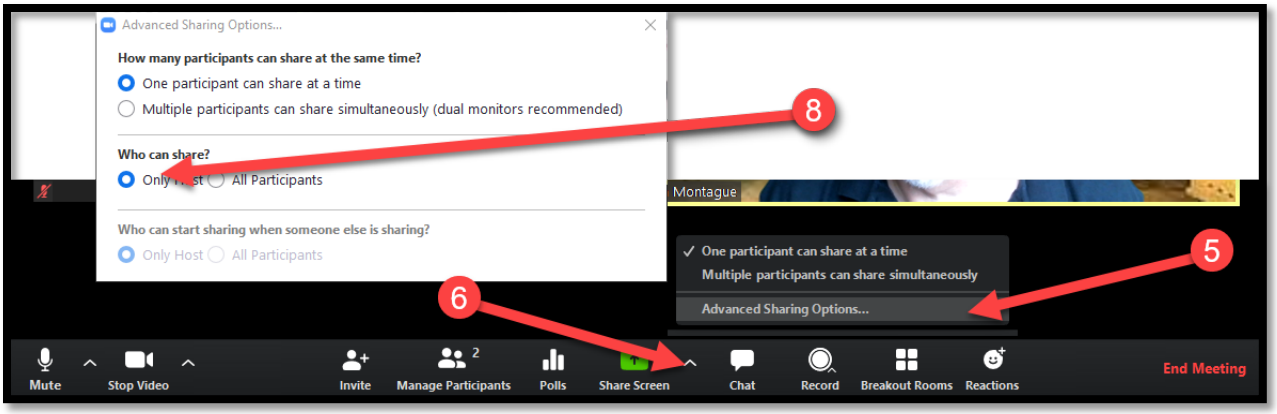
Promote any presenters to Co-Hosts



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)

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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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