



## Group Valet for The Club Ibis



***A Special Interest Group Management Program***  
*Available on the Club App & Website*

## CREATING A GROUP HOW-TO MANUAL

*(Please note that every Group must be approved, and Group Captains must agree to the rules of use for GroupValet, prior to having full functionality of managing a group within GroupValet.)*

### **Questions about Group Valet?**

Contact the Communications Department at [news@clubatibis.com](mailto:news@clubatibis.com).

# STEP 1

## Let's create your group!

Before we start setting up your group, let's figure out what type of group you'd like to create. There are 3 types within GroupValet, offering different security and accessibility functions to fit *your* group.

COMMUNITY SEARCHABLE	
Community searchable groups make it easy for anyone at your club to find your group and request to join. Only members of your community can be added.  This is the most common group type.	<b>Best For:</b> Club-run social groups and member-run groups where the motto is "the more the merrier."
COMMUNITY PRIVATE	
With community private groups, members must be added by the group captain. Club members will not be able to search for, or request to join, these groups. Only members of your club can be added.  Only members of your community can be added.	<b>Best For:</b> Committees, the Board of Directors, or member-run groups that wish to stay small.
PRIVATE	
Private groups offer another option for "invite only" groups. Unlike Community Private groups, anyone can be added to Private groups, regardless of club affiliation.  These groups are less frequently used than Community Searchable and Community Private groups.	<b>Best For:</b> Groups that include people outside of your club.

Now that we know about the different group types, it's time to create your group.

1. Head over to GroupValet.com and login (groups must be added through the website)  
*\*If you've never logged in before, skip ahead to the black box on page 7, and follow those instructions.*
2. On the GroupValet Dashboard, click the "Create Group" button at the top
3. Fill out the Create group form
  - Give your group a name
  - Choose the Group Type
4. Complete the Group Type-specific information that populates based on your Group Type selection  
  
**Pro-tip:** Most groups won't use the "Custom Columns" field, so we recommend leaving this blank until you've used GroupValet enough to really know if you need to include anything else.
5. Click "Next" to save your group and move on to setting up activities for your group!

And now you've created your first group!

# STEP 2

## Creating an Activity.

### Bringing people together around Activities is what GroupValet is all about!

There are 4 types of schedules you can choose from to accommodate all sorts of activities. Let's get familiar with them.

#### ONLY ONCE

As the name suggests, this event type is best for one-time activities, or those that occur sporadically, without a set schedule.

#### WEEKLY

Weekly events allow you to set an event up on repeat, whether it happens once a week or several times, like every Mon, Wed, Fri.

#### MONTHLY

Accommodates standard date-based rules and smart scheduling rules like "the third Thursday of every month."

#### CUSTOM

For recurring events that don't follow a formulaic schedule, Custom Events allow you to schedule up to 25 dates.

### There are two ways to create an activity:

1. If you're setting up your group for the first time, the Setup Wizard will prompt you to create your first activity during the process of creating your group.
2. For existing groups, head on over to your Group Homepage and click "Create an Activity."

### Now let's go set one up!

1. Select "Create an Activity" if you're starting from the Group Homepage
2. Give your Activity a name, like "Joe's Weekly Golf Game"
3. Select your Activity Type
4. Answer the Schedule Questions  
Schedule Questions determine how many days in advance of the activity the signup reminder emails will be sent to the group, when the signup period ends, and when the attendee list is sent to the group captain.
5. Create your Signup Questions  
Signup Questions let you collect additional information from your attendees (like t-shirt size). These are optional.

**Pro-tip:** Once you create a question it is stored so you can reuse it for other activities. Simply create the question and drag it into the "Use these questions" or "Do not use these questions" area.

You're all set! Remember, only the fields with an asterisk are required, but the more information you complete, the more GroupValet will be able to help you manage your activities.

# STEP 3

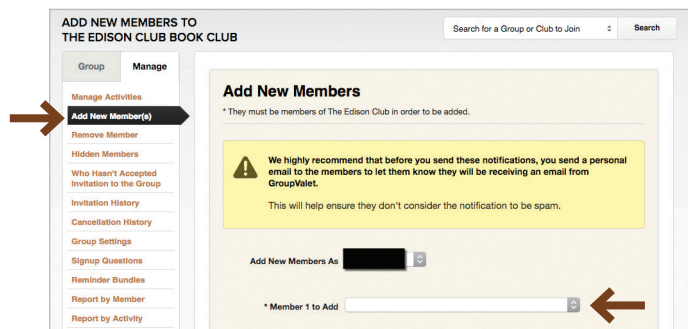
## Adding Members to Your Group.

Now that your Group and your Activities are setup, it's time to add some people to share them with.

Your club roster has already been loaded into GroupValet, so all you have to do is select the members you'd like to invite from the roster.

### Here's what to do

1. Go to the Group Homepage and click the "Manage" tab on the left.
2. Click "Add New Members" and select the members you want to add.  
(If adding non-community members to a Private Group, you will need to enter their email address at this stage)



### What happens next

Once you select the members you'd like to add to your group, they receive a notification that they have been added that includes a link to the Group Homepage so they can check out the upcoming activities.

(Non-community members will receive an email invitation that they may choose to Accept or Decline)

GroupValet's Single Sign On automatically recognizes who they are, and handles the logins automatically whenever they click in an email.

GroupValet's **SINGLE SIGN ON** means many members will never login to GroupValet - they won't need to! Members can RSVP to your group's activities directly from their inbox, without ever logging in.

### HAVE A MEMBER THAT NEEDS TO LOGIN?

Because members have already been loaded into the system during GroupValet setup, they do NOT need to register or setup a new account.

Simply have them click "Get My Password" on GroupValet.com or in the GroupValet app and enter the email address on file with your club to be able to login directly.



# Managing Your Group

Setting up your group in GroupValet is easy--and so is managing it. Here is a cheat sheet for the most common functions you'll use for day-to-day group management.

## Sharing Group Management Duties

Any member can be made a Group Manager, which gives them access to the “Manage” tab on the Group Homepage. Your group can have as many managers as you need to keep things running smoothly.

### To add a new Group Manager:

- Go to the Group Homepage
- Click “Directory” on the left hand side
- Find the member you'd like to give Manager access to
- Click the “Make Manager” link to the right of their name (only Managers can see these)

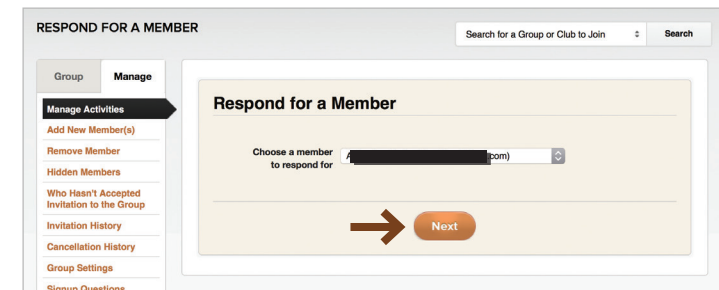


All set!

## Manually Log an RSVP

Sometimes members just need you to do it for them. If a member contacts you to RSVP for them, it's easy to log their response.

- Click “Manage” on the Group Homepage
- Click “Manage Activities”
- Click “Respond for Members”
- Choose the member you are RSVPing for
- Follow the on-screen steps!



## Edit or Cancel an Activity

- Click “Manage” on the Group Homepage
- Click “Manage Activities”
- Find the activity you need to update
- Click “Edit/Cancel this activity” and select whether this change is for a single date or the whole series (if applicable)
- Make your changes and click “Update” at the bottom to save them

# Managing Your Group

## View Real-time Activity Responses

Keep tabs on your signups to see who has confirmed, declined, and who you're still waiting to hear from.

- Click “Manage” on the Group Homepage
- Click “Manage Activities”
- Go to the Activity you want to view responses for

(Of course, once the signup period has closed, the final list will be emailed to you.)

MANAGE ACTIVITIES FOR THE EDISON CLUB BOOK CLUB

Search for a Group or Club to Join Search

Group Manage

Manage Activities

Add New Member(s)

Remove Member

Hidden Members

Who Hasn't Accepted Invitation to the Group

Invitation History

Cancellation History

Group Settings

Signup Questions

Reminder Bundles

Report by Member

Report by Activity

Go to Group

THU SEP, 2016 15

Monthly Book Discussion

Sign Up will end on Tuesday September 13, 2016 at 3:00 pm

Signup Notice 1 Sent: Wed Aug 31, 2016 @ 7:10 am ET

Signup Notice 2 Sent: Fri Sep 9, 2016 @ 7:40 am ET

Respond for Members | Signup Guest | Edit/Cancel this activity | Send Sign-up Notice

0 Signed-Up:

1 Declined: Dana Offello

41 No Response:

Paul Adamowski	Pat Brady	Jacquelyn Brayton
Laura Brown	Diane Brunkhorst	Russell Carlton
Lynnda Castromore	Maria Coligero	Diane Crookes
Sandra Dickinson	Mary DiPalermo	Nancy Endace
Diane Fauson	Rubin Ferris	Sally Gay
Vickie Garrett	Carrie Haggard	Nancy Hershley
Elizabeth Kuttaw	Suzanne Mason	Dorcas Matasich
Loretta Maurer	Patricia Messing	MJ Miller
Elaine Mills	Susan Nelson	Margaret O'Brien
Ellen Pea	Carol Richards	Betty Rose
Kathy Sabatello	Harriet Severenko	Marsha Shea
Deanna Venetus	Susan Vincent	Sandra Vigler
Cynthia White	Kate Vitak	Beth White
Linda Walnut	Susan Wood	

d Tennis Train

shire Center

Up: 250 Max / 230 Rem

James Knight

Bill Bradley

John James

## Send an Additional Signup Notice

GroupValet automatically notifies group members to signup for upcoming activities, but there may be times when you want to give the entire group, or even individual members, a little extra nudge (maybe while you're viewing the real-time responses!).

### To manually send a reminder:

- Click “Manage” on the Group Homepage
- Click “Manage Activities”
- Click “Send Sign-up Notice”
- Select all members who should receive the notice
- And click next to get your confirmation.

Within 15 minutes, that notice will be on it's way to remind them to get their response in!

SEND A SIGN-UP NOTICE FOR MONTHLY BOOK DISCUSSION ON THURSDAY OCTOBER 20, 2016

Search for a Group or Club to Join Search

Group Manage

Manage Activities

Add New Member(s)

Remove Member

Hidden Members

Who Hasn't Accepted Invitation to the Group

Invitation History

Cancellation History

Group Settings

Signup Questions

Who should receive this sign-up notice?

All group members who haven't responded yet

All group members who haven't responded yet

Selected individuals who haven't responded yet

Submit