

Updated: March 6, 2017

Steps for creating an online event registration webpage

Please note the development of a new, online event registration webpage page can take a *minimum of two (2) weeks to complete.*

LEGEND

Event organizer: **EO**

Kelmin Yu (or team member): **IITS**

Step 1:

- » The **EO** contacts Financial Services' Restricted Funds office to obtain a fund number.

IMPORTANT FINANCIAL INFORMATION:

- a) Upon receiving confirmation that your conference account has been created, information will also be provided about **charging taxes on registration fees**, *if applicable*. Please take this into account when preparing your budget and/or registration fee amount.
- b) The conference account (provided by Financial Services' Restricted Funds) will be charged a **5% administration fee**, on the total of the transactions, in an effort to recuperate the (average %) credit cards fees charged to Concordia by the credit card companies. Please take this into account when preparing your budget and/or registration fee amount.

Step 2:

- » The **EO** emails help@concordia.ca with the request to create an online event registration page, along with the fund number and the online registration page edits (**follows the steps outlined in "PROCEDURE TO EDIT A SAMPLE, ONLINE EVENT REGISTRATION WEBPAGE" on page 2**).

A ticket will be generated for your request. Your request will be forwarded to the appropriate person in IITS and that person will get in touch with you.

Step 3:

- » **IITS** provides a pre-production page to the **EO**.
- » The **EO** communicates and validates changes to/with **IITS**.
- » The **EO** provides approval on final version.

Step 4:

- » **IITS** provides the production weblink to the **EO**.
NOTE: IITS tests the page, with a test payment amount, prior to production.
- » The **EO** posts the weblink where required (conference website, etc.).

If at any time during the process outlined above you have questions, please email fcms@lists.concordia.ca.

PROCEDURE TO EDIT A SAMPLE ONLINE EVENT REGISTRATION WEBPAGE

Indicate the changes to the information (dollar amounts, text fields, etc.) presented in this [sample page](#).

Please note you will need a **wired** Concordia computer to access the sample page.

HOW TO INDICATE EDITS:

Mark-up options include making a pdf of the page and using the comment box in places where the edits are to be made or printing the page and marking it by hand.

Sign in – part I

- » The top part of this page can be customized for each event (and appears on the page after signing in, as well):
 - ‡ Event name
 - ‡ Event date(s)
 - ‡ Event location
 - ‡ Logo (if you have one)
 - ‡ Main conference website link
- » For **Concordia registrants**: the registrant signs in with his/her netname and password
- » For **NON-Concordia registrants**: the registrant needs to use his/her email address to sign up for a new account, and the email address will be his/her user ID for the online registration.

Registrant and conference participation information – part II

- » Make sure to read all the way through and change fields such as dates, amounts, conference contact email address and name, links to other sites (abstract submission), etc.
- » If some of the fields that appear in the form will not be used, please indicate which ones to remove. The same for those to add.

Please do not remove the following notes (they must appear on all online event registration pages):

1. For **technical assistance** using this form, please send an email to fcms@lists.concordia.ca (please indicate *conference name* in the subject line).
2. For **assistance regarding the payment process** (i.e. credit card issues), please send an email to fcms@lists.concordia.ca (please indicate *conference name* in the subject line).
3. **Concordia tax numbers**: GST (106966591 RT0001) & QST (1006010110 TQ0012).

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Payment – part III

- » The submit button at the bottom of the page takes the registrant to the payment page (**credit card payment only is accepted**).
- » If checks are accepted for your conference, please indicate this in the notes section. The event organizer (or designate) will be responsible to process the check payments by depositing the checks at the **Student Accounts & University Cashier's Office**. The deposit forms and instructions on how to fill the forms can be found on C-Space under the section "University Cashier": <https://cspace.concordia.ca/services/budget-expenses-finance/forms-guides.html>. Please check off the tax boxes where applicable. If you are unsure whether taxes apply, please contact Restricted Funds.

Registration confirmation email - part IV

- » The registrant will receive a confirmation email, with a copy to the **EO**. The confirmation email does not list the amount paid, so if the customer requires a receipt they should print the confirmation page.