REGONLINE FAQS (Frequently Asked Questions)

Contact: regsupport@acm.org

RegOnline Fees

COST: US Dollars
$ 2.25 per registrant (not transaction)
Standard Credit Card Discount Fees (3%)
No License Fees
No Maintenance Fees
No Training or Support Fees

COST: Euros
€2.25 per registrant (not transaction)
Standard Credit Card Discount Fees (3%)
No License Fees
No Maintenance Fees
No Training or Support Fees

COST: CAD
$2.25 CND per registrant (not transaction)
Standard Credit Card Discount Fees (3%)
No License Fees
No Maintenance Fees
No Training or Support Fees

*At this time Registration Revenue can only be collected in US Dollars, Euros, and Canadian Dollars

RegOnline as a Preferred Vendor

ACM IS RECOMMENDING REGONLINE AS A PREFERRED VENDOR FOR REGISTRATION SERVICES AND HAS NEGOTIATED PREFERRED RATES FOR THE USE OF THIS REGISTRATION SYSTEM.

- The set up and management of the actual registration site would be handled by the volunteer registration chair or conference management vendor if they had one.

- The system is easy to use and there are help buttons at every stage as well as help “Tutorials” embedded in the application.

- Web based training is offered once a week and people can sign up online.

- Maintenance and support, there is e-mail and 800 phone access to tech support 7AM-7PM Mountain time.

- They also have a London office for people in Europe.

- The application has a preview button, so you can preview each piece as you build it, an HTML Editor, so no need to be familiar w/ HTML, you can simply cut and paste anything you like (tool bars, logos, etc) into the HTML editor and it will process the code for you.
- It handles multiple registration types, member, non-member, student and will process them by dates for early, late and on-site.

- It could also collect any other types of payments we requested, for example, exhibitor booth sales or sponsorships by setting up a different category of registrant, if we choose. There are capacity controls for sessions and it will also allow a waitlist feature.

- The system handles multiple administrators and multiple users with no limits. You can also set varying levels of access privileges.

- Lastly, there is an ONSITE Module which can process transactions on site through a self-serve Kiosk. All that is required is high speed internet access for the terminal a laptop and a printer.

**FINANCIAL: US Dollars**
Finance will be setting up an exclusive merchant account for all conferences that use REGONLINE. All charges would post directly to this account and be identified by both a unique transaction ID number as well as an event number (CIP Cost Center) which would assist accounting in reconciling the funds to the different events. Based on our volume credit card, credit card fees would be lower at Visa/MasterCard: 2.80% American Express: 3.47%. This is far lower than their standard 5-6% per transaction charge. All funds would post directly to our merchant account as they took place. No Weekly or Bi Weekly batches.

**FINANCIAL: Euros**
Conferences that use REGONLINE services for registration processing will have exclusive use of REGONLINE’s Euro denominated merchant account. All charges would post directly to this account and be identified by both a unique event and transaction ID number. Credit Card fees are set at 4.3%.

**FINANCIAL: Canadian Dollars**
Finance will be setting up an exclusive merchant account for all conferences that use REGONLINE. All charges would post directly to this account and be identified by both a unique transaction ID number as well as an event number (CIP Cost Center) which would assist accounting in reconciling the funds to the different events. Credit card fees would be set at: 4.3%. All funds would post directly to our merchant account as they took place. No Weekly or Bi Weekly batches.

**STAFFING & SET UP**
We have ap direct bill privileges w/ REGONLINE. Simply direct the conference leaders to our account executive to set up. No credit card would be required from the volunteer as is the current standard; we will be billed per event.

**VOLUNTEER REQUIREMENTS**
- Volunteer Registration Chair to edit and manage the event

**EQUIPMENT NEEDED FOR ON-SITE REGISTRATION**
- On Site Printer
- Onsite Computer w/Internet Access

**Wire Transfer Information**

**FOR CONFERENCES COLLECTING REGISTRATION IN USD**

**Bank Information:**
JP Morgan Chase Bank NA
4 Metrotech Center, 8th Floor
Brooklyn, NY 11245
**BANK ROUTING NUMBER:** 021000021
Account Holder:
Association for Computing Machinery
2 Penn Plaza, Suite 701
New York, NY 10121-0701
Account Number: 301170895565
SWIFT Code is CHASUS33.

FOR CONFERENCES COLLECTING REGISTRATION IN EUROS

Bank Information:
JP Morgan Chase Bank N.A. London
125 London Wall, London EC2Y 5AJ
United Kingdom

Account Holder:
Association for Computing Machinery, Inc.
2 Penn Plaza, Suite 701
New York, NY 10121-0701
Account Number: 37500801 (Final Beneficiary)
SWIFT CODE: CHASGB2L
IBAN: GB45CHAS60924237500801

The following information should be part of ALL wires:
The name of the company
A short description
A contact name at ACM

When paying via wire, attendees should register through RegOnline and select other payment options. They should then send a wire transfer using the attached instructions. Once they complete the wire they should let you know (the conference chair) it's been completed. Confirmation of the transfer should be forwarded to your program coordinator who will email you back once the wire has been received. Their account in RegOnline should then be zero balanced. This will have to be done by the admin (conference chair or registration chair).

For Check Payments

Registrants paying by check should send the check to you (the registration chair or treasurer). The checks should be made out to ACM and/or the conference. We accept all checks and money orders. Once you receive the check you should zero balance the account in RegOnline then forward checks to your conference logistics coordinator for deposit.

How is the RegOnline account set up for our conference?

Your account is set up by ACM as a child account under ACM so you will not receive invoices for this service. The bills will come directly to ACM and be charged to the conference’s account.

Is RegOnline easy to use?

The RegOnline system is self-explanatory and extremely easy to use. If you need help, there are tutorials throughout and you can also sign up for free 1-2 hr live training sessions, which address how to build an event. There are also tutorials which have been specifically customized for ACM conferences available here: http://www.regonline.com/ACMtraining.
Toll-free tech support and live chat is also without cost, and is friendly and efficient. They are familiar with our accounts and conferences and will work hard to resolve any problems that you encounter.

**Which browser should I use to set up the event?**

While all browsers will run the website, RegOnline recommends setting up the event using Internet Explorer or Firefox.

**What if I make a mistake while constructing my registration pages?**

All accounts are initially opened with the status of “Testing”. No one will be able to access the site until you have built it to your satisfaction and opt to go “Active,” i.e., you are ready to accept online registrations.

RegOnline strongly suggests (and ACM concurs) that you test the event. ACM would be happy to help with this.

**Are there any special fields that I should require that are not default settings?**

Yes. Under the “Personal Information” tab of Setup, we ask that you require the country field and the zip code field. By requiring the country code, we are hoping to cut down further a small number of fraudulent registrations. In addition, both the country and zip code fields will help us compile effective and complete mailing lists.

Under the “Personal Information” tab, “Custom Fields” section, the Postal Mail Opt-In and Email Opt-In should be visible and required. Please note that these fields and any field title should not contain hyphens or dashes.

For ACM to accurately compile our lists of attendees, we need to standardize the names of some of the fields used.

Please use: First Name, Last Name (please do not change this to “surname”), Company/Organization (please do not change this to “affiliation”), Address 1, Address 2, City, US State/Canadian Province, Zip (Postal Code), Country, Email, Membership Number, Postal Mail Opt-in, Email Opt-In.

**How do I collect meal preferences and find out if anyone requires any special services in order to participate in the conference?**

This is an important question to ask. You can create a question under the “Personal Information” field.

**How do we verify those registering as ACM Members at the special member rate are actually members?**

RegOnline is able to authenticate ACM and SIG Members when they input their membership number. ACM Professional, Student and SIG member numbers are validated upon registration. Please note that Registrant Types with this feature will be disabled if the “Name on Reports” field is modified. To learn more, follow this link to customized recorded training. [https://www.regonline.com/builder/site/tab2.aspx?EventID=1101141](https://www.regonline.com/builder/site/tab2.aspx?EventID=1101141)

**What if an author needs to pay for extra pages of a proceedings?**

Publishing extra pages in the proceedings is at the discretion of the conference committee. Payment for these pages is handled through the conference RegOnline account and must be set up as a line item by the Registration Chair. Authors who have already registered for the conference and now require payment for extra pages, must revisit their registration through using their confirmation number and follow payment
instructions for extra pages. It is the committee's responsibility to ensure that all authors who have requested extra pages have paid.

*What should I know about the “Payment and Verification” tab of Setup?*

ACM’s master account, and therefore all its sub-accounts, have these fields checked:

- **Store credit card numbers after initial payment processing** *(what is this?)*
- **Collect credit card security code** *(what is this?)*
- **Require this code** (public and on-site registrations only)

Please do not adjust these settings. Collecting credit card numbers makes refunds possible, and collecting the security (or “CVV”) code again reduces the small incidence we have of fraudulent registration.

*Should I test the credit card functionality of my site before accepting registrations?*

This is not necessary, as ACM has already tested the credit card functionality.

*Which credit cards does ACM accept?*

We currently accept American Express, MasterCard, and Visa, and these options can be checked.

*Should I accept checks and/or cash on-site?*

Again, the decision is up to you, checks would be sent to ACM. Cash would be deposited by you, and a check or money order in the same amount written to ACM for credit to the conference.

*How can I provide free or discounted registration to attendees?*

If you need to ‘comp’ an agenda item for some of your attendees (i.e., you want to let them in for free or at a discount), there are a couple of options available. To determine which option may work best for you, one question to ask is whether you will be entering these registrations, or will your attendees register themselves?

- If you (the admin) will be entering the registrations yourself, create a **Registrant Type** that is visible to **Admin Only** (not Public), then create and display a $0 agenda item to that Registration Type, then do an Admin Register for these attendees.
- If your attendees will register themselves, create a discount code for the agenda item then advise your attendees to enter that code when they register. Instructions on how to create a discount code are on the next page.
Create a new discount code for an Event Fee created on the Start page:

1. Edit your Event and click on the Start page.
2. In the Event Fee field, make sure that your standard registration fee or cost is entered and click on the Advanced link. This will open the Advanced Fee Options window.
3. Click the Options link next to the Standard Price field. Here you will find the Discount/Access Codes section where you can add your discount code(s).

Field Descriptions:
Label On Form: Enter the text that you want to display on the registration form next to the discount code input field.
   For example: “Enter your discount code here”
Require All Attendees to Enter a Code to Select Item: Select this checkbox if you would like to force registrants to enter a discount code. This is suggested for invitation only items that require an access code for selection.

4. Click Add Code to enter each code individually, or click Bulk Load to upload many codes at once.

5. Select Code Type - Selecting Discount will allow this code to adjust the cost of this item. Selecting Access will allow the code to be used as a password.
6. Enter the code word that your registrants will enter. Spaces are not allowed in the code word.
7. Select how the code will affect the price of this item.
   For example: Increase Price By 10 Percent.
8. Enter the total number of times this code can be used in the Code Use Limit field (if applicable).
9. Click Save & Close to your changes.

*If you clicked Bulk Load: Discount (Access) codes* - Enter in the discount code(s) that you want to use for this Fee item.
   - The formula for a **discount** code is: 
     Code—amount (code equals minus amount).
     No dollar sign or decimal point is necessary.
     The ‘Code’ is what you want registrants to enter in order to receive the discount. You can create a limit on the number of uses of a particular discount code by entering the limit in parenthesis after the amount.
     For example: This is a discount code with only 10 uses: code1 = -100%(10). You can enter more than one discount code simply by putting a comma between each completed code.
     Remember not to add any extra spaces anywhere in the formula (including after or before commas separating multiple codes).
     For example: code1 = 25(5), code2 = 35.75(10), code3 = -30%, code4 = -42.5%(50)
   - The formula for an **access** code is:
     Code—Or Code(3) if you would like to limit the code to 3 uses.
What should I do if someone needs a refund for a cancellation?

Method when a cancellation fee is not being charged:

Under “attendee information” select “cancel registration”. When saved, this will automatically give you the option of refunding the remaining balance or new transaction (see blue banner below). Click refund remaining balance.

### Transactions

<table>
<thead>
<tr>
<th>Date</th>
<th>Type</th>
<th>Notes</th>
<th>Amount</th>
<th>Sub-Total</th>
<th>Add By</th>
<th>Mod By</th>
<th>Delete</th>
</tr>
</thead>
<tbody>
<tr>
<td>4050927</td>
<td>Transaction Amount</td>
<td></td>
<td>$380.00</td>
<td>$380.00</td>
<td>Attendee</td>
<td>Attendee</td>
<td></td>
</tr>
<tr>
<td>4050928</td>
<td>Online Credit Card Payment</td>
<td>681662-15229614 (Details)</td>
<td>-$380.00</td>
<td>$0.00</td>
<td>Attendee</td>
<td>Attendee</td>
<td></td>
</tr>
<tr>
<td>4056848</td>
<td>Credit Due to Cancellation</td>
<td></td>
<td>-$380.00</td>
<td>-$380.00</td>
<td>registrationacm</td>
<td>registrationacm</td>
<td></td>
</tr>
</tbody>
</table>

**Total:** -$380.00

### Refund remaining balance New Transaction

Method when cancellation fee is being applied:

Under “attendee information” select “cancel registration”. When saved, this will automatically give you the option of refunding the remaining balance or new transaction (see blue banner above). Click new transaction then “adjust this registrant’s balance due”. When brought to the next page choose “other charges” as the type. In the amount section, apply the cancellation fee then save and close. Lastly, click refund remaining balance.

What if the person only needs a partial refund, e.g., they want to cancel only a banquet ticket, or there has been a change in fees, etc.?

Do not change the person’s status to “canceled”.

In the Agenda section of the attendee’s registration select “edit”. Deselect the initial payment and select the new payment: e.g. deselect “regular registration” and select “early registration.” E.g., simply deselect...
banquet ticket, etc. A window will come up either: Online Credit Card Payment or Online Credit Card Refund. Click “Yes, process the amount above”. Then save and close.

What if the person needs a partial refund, e.g., they registered as a non-member when they should have registered as a member, or late rate when it should have been early rate, etc.?

Do not change the person’s status to “canceled”. In the Transaction section of the attendee’s registration select “new transaction”. Select the “adjust this registrant’s balance due”. Pick “other credits” as type, enter the amount they are being refunded and enter the rational in the notes section, then save and close. In the Transaction section select “refund remaining balance” and “ok”. The amount will be refunded.
By creating a Custom Field on the Lodging & Travel page of the registration form, you can display instructions to your registrants that explain how to make their own hotel accommodations.

**To do this:**

1. Edit your event and make sure you are on the **Registration Form Pages** tab.
2. Click on the **Lodging & Travel** page.
3. Scroll down to the Lodging Custom Fields section and click the link to **Add a New Custom Field**. The Define Custom Fields window displays.
4. Make the following entries:
   - **Field Type** – choose the type called Always Selected, so that the information will display both on the Registration Form and on Registrants’ Records.
   - **Name on Form** – Enter all the text here that you want the user to see when they register
     - Example: "Reservations are being taken directly by the Denver Marriott hotel, at www.marriott.com or at 1-800-MARRIOTT."
   - **Name on Receipt** – By default, info entered into the Name on Form is copied to this field. You may edit this field if you wish different info to display on the receipt or on your Event Website.
   - **Name on Reports** – This is a name for this field in your reports, it can be something simple like "Hotel Contact Info".
   - **Visible/Required** – Check the appropriate boxes for the Registrant Types that you want to see this item (All by default).
5. When you’ve finished making your entries, scroll to the bottom and click **Save & Close** to return to the event builder.

**Custom Field Details**

<table>
<thead>
<tr>
<th>Name on Form:</th>
<th><a href="http://www.marriott.com">www.marriott.com</a> or at 1-800-MARRIOTT</th>
</tr>
</thead>
</table>

**Naming Options**

- **Name on Receipt:** Reservations are being taken directly by
- **Name on Reports:** Reservations are being taken directly by
- **Name on Badge:** Reservations are being taken directly by

**Field Type:** Always Selected

**Additional Information:**

Keep in mind that redirecting registrants to another URL (web address) in the middle of the RegOnline registration process could cause them to click the link to make their reservations, and forget to return to their RegOnline registration form to complete it (or cause the registration form to time-out). This will result in an incomplete registration and the registrant will have to come back to register again.

Therefore, we recommend that you provide this information to them either before or after they complete their registration, or make sure your link opens in a new window if clicked. Some suggestions would be to include the lodging instructions:

- In the **Confirmation Email** that they receive
- In the **Confirmation Page message**
- On the **Event Website**
**What happens if I need to charge a registrant for an item (workshop, banquet ticket, coffee mug, etc.) that s/he had not originally purchased in their registration?**

Because the RegOnline system is self-service, registrants can go back into their attendee record and charge any items they would additionally need or want. This prevents questionable charges. In very rare circumstances, a charge would need to be put through on behalf of a registrant. In those cases, **the charges must be put through at ACM**. In addition, explicit written permission must be given by the registrant via email or fax to allow this transaction. **Never attempt to charge a registrant's credit card without notifying ACM.**

**What happens to the status of my conference after it is over?**

Shortly after the end of the conference, the event status will be changed to "inactive," but will still be able to be viewed and modified. The inactive status also does not impact your ability to generate reports.

The change to inactive status is a housekeeping method that also prevents people from registering for a conference after the fact. This occasionally happens in error, and in the cases of fraudulent registration and the testing of stolen credit cards.

**What happens if I want to save my registration pages for subsequent conferences?**

Your event will remain in its "inactive" state indefinitely and will always be available for you to copy into subsequent years. When you are ready to work on the following year’s registration pages, new registration chairs will require a username and login and should notify ACM headquarters (regsupport@acm.org). They will create a new event for the current year’s conference.

All registration chairs, new or returning, should request a new event code for the event to ensure proper crediting of funds to the conference. Please contact RegSupport: regsupport@acm.org.

It is very important **not to create a template of your event** as this template can only be saved to ACM’s parent account where you will not be able to access it.

**Does RegOnline have an anonymous survey feature?**

Yes. **This service is free of charge.**

To create a standalone, anonymous survey:

- On the Events tab, navigate to the folder where you want to add the new survey.
- Click the Add Event button. A menu will appear with a list of form types.
- Select Survey.
- Enter a name for the survey in the Survey Title field.
- Click on the Participant Information tab and make sure that all identifying fields are unchecked for both the Visible and Required columns.
- Continue to the Custom Questions section and create your questions. Creating survey questions is almost identical to creating Agenda Items in events.
- If you would like to add a Confirmation or Thank You message, continue to the Confirmation section. If not,
- Click Save & Stay or Save & Close to save your changes.