REGONLINE FAQS (Frequently Asked Questions)

- To setup your registration page please contact regsupport@acm.org

- If you have questions or problems using Regonline that cannot be answer in the FAQS below or on the Regonline website, please contact regsupport@acm.org

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

REGONLINE FEES

COST: US Dollars
$ 2.25 per registrant (not transaction)
Standard Credit Card Discount Fees (4.5%)
No License Fees
No Maintenance Fees
No Training or Support Fees

COST: Euros
€2.25 per registrant (not transaction)
Standard Credit Card Discount Fees (4.5%)
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 (4.5%)
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

Finance has an exclusive merchant account for all conferences that use REGONLINE. All charges will post directly to this account and be identified by both a unique transaction ID number as well as an event number (CIP Cost Center). No credit card is required from the volunteer.

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.
- The system is easy to use and there are help buttons at every stage as well as a Support section with articles, training videos, and user guides.

- Web based training is offered as well. You can sign up here: https://www.regonline.com/builder/site/Default.aspx?EventID=1800986

There is also a Maintenance and support line:
800-430-8027
Press “1” for Support
- Live Chat is available as well

## SETTING UP YOUR EVENT PAGE

### Are there pre-recorded training videos?

Yes, follow these links for tutorials on the related made specifically for ACM events:

- Badges – how to use RegOnline to create badges. [http://youtu.be/_FatNI1caFQ](http://youtu.be/_FatNI1caFQ)
- Creating an event from a template – how to start a new event as opposed to copying one from another year. [http://youtu.be/cRC6a4907Rg](http://youtu.be/cRC6a4907Rg)
- Credit card refunds – how to refund online payments. [http://youtu.be/Q-9YD74gWww](http://youtu.be/Q-9YD74gWww)
- Event overview – learn the basics of editing your event. [http://youtu.be/Ps5u8xxjqHl](http://youtu/be/Ps5u8xxjqHl)
- Events tab – learn the basics of using the “events tab” and copying an event. [http://youtu.be/Y_oxsDfjdog](http://youtu.be/Y_oxsDfjdog)
- External membership authentication – how the external membership authentication process is setup and what you should be aware of. [https://youtu.be/4Bsu5xPuqK8](https://youtu.be/4Bsu5xPuqK8)
- Reporting – how to create reports with RegOnline. [http://youtu.be/U3xwjHWITYU](http://youtu/be/U3xwjHWITYU)
- Resetting passwords – learn how to reset passwords for your registrants. [http://youtu.be/6afO8sKOKDw](http://youtu.be/6afO8sKOKDw)

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

While all browsers will run the website, RegOnline recommends setting up the event using Google Chrome, Mozilla Firefox, and Internet Explorer

### 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. Please contact regsupport@acm.org for assistance with testing.

**Will a link to our registration page appear in search engines like Google?**

If you would like to make your event visible on these search engines, all you have to do is change your event from “private” to “public.”

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

**Personal Information Tab**

- Recommended Field – “Country” must be visible and required.
- Custom Field – “Postal Mail Opt-In” must be visible and required;
  Email Opt-In must be visible
- Custom Field – Special needs questions such as, “Do you have a disability or special need that requires accommodation?” and “Dietary Restrictions” can be listed here as well. These are important questions and should be asked.

Under the “Personal Information” tab of the Registration Form, 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.

A link to ACM’s Policy Against Discrimination and Harassment for Members and Event Attendees (http://www.acm.org/special-interest-groups/volunteer-resources/officers-manual/policy-against-discrimination-and-harassment) should be placed at the bottom of the 1st page of registration. In addition, 2 questions should be included in all registrations:

**Gender**

- Male
- Female
- Other
- Prefer not to respond

**Age Range**

- 17 and under
- 18-21
- 22-25
- 26-30
- 31-35
- 36-40
- 41-45
- 46-50
- 51-55
- 56-59
ACM is using this information to determine the audience so that the organization can better serve them.

On the final confirmation page and in the confirmation email, the conference hotel should be advertised and the booking link included.

VERIFYING ACM MEMBERSHIP

How do I 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.

Does Regonline block internet traffic from certain countries?

Regonline is prohibited from doing business with some countries. This is due to economic sanctions as well as the quantity of fraudulent transactions received. If you have a legitimate registrant from a country that cannot access Regonline there are a couple of options. The registrant can pay in cash at the conference or you can perform an “admin registration” and accept an offline payment.

It is good to note that the following countries have limited use of Regonline: Balkans, Belarus, Burma, Cote d’Ivoire, Congo, Cuba, Iran, Iraq, Liberia, Lebanon, North Korea, Somalia, Sudan, Syria, Zimbabwe, Benin, Cameroon, Ghana, New Caledonia, Niger, Nigeria, Niue, Togo, Zambia.

What if I receive a registration that appears to be fraudulent?

Please cancel the registration. Changing the visibility of the “Payment by Check” option greatly reduces this issue.

Can an author pay for extra proceedings pages using Regonline?

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. Publishing extra pages in the proceedings is at the discretion of the conference committee.

PAYMENTS

PAYING VIA WIRE TRANSFER USING REGONLINE

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:
Name of the person/organization sending the wire
Conference Name

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.

Is RegOnline easy to use?

- The set up and management of the actual registration site is handled by the volunteer registration chair or conference management vendor if there is one.

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.
- 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, and student and processes them by date for early, late, and onsite.

The system handles multiple administrators and multiple users with no limits. You can also set varying levels of access privileges. Therefore, more than one committee member can access Regonline.

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.

**How do I process an Admin Registration, so I can register on behalf of some of my attendees?**

- Admin registrations are still charged all applicable registration and transaction fees
- When you perform an Admin Registration for an attendee, you can see information and options that the general public might not see
- For example, you can set a Registrant Type to be visible only to admins, specify the attendee's status manually when you complete the registration, or offer certain payment types to be visible only during admin registration

If your event or items have capacity limits, be sure to exercise care when creating Admin Registrations, since Admin Registrations will ignore such limits, allowing registrations to be created beyond the set capacities

**COMPLETING A NEW ADMIN REGISTRATION**

1. From the main "Events" page, click the title of the event in which you'd like to perform the Admin Registration
2. Click the "Attendees" icon
3. Click "Admin Registration" link in the upper right
   *You can also get to this link by going to "Registration Form" under "Build"
4. Enter the Email Address for the person you are registering
5. Select a Registrant Type (if applicable)
6. Click the "Continue" button to go to the next page
7. Continue the registration process, entering the required information on each page
8. On the "Checkout" page, before completing the registration, you will have a couple of special options:
   a) "Send Confirmation Email" - sends the Confirmation email for this event to the attendee
   b) "Apply Payment Now" - the system processes this payment immediately to the attendee's record (removing an extra, manual step when processing check, cash, or other offline payments)

**MAKING EDITING CHANGES THROUGH ADMIN REGISTRATION**

- You also have the ability to log back into a registration created with an admin registration to make any needed changes
• You can use this feature as well to log in to any attendees registration form and view their registration as they would see it, without the need for the attendees password
• While this information can be found in an attendees registration record, this is a useful method to help attendees find the information they need by walking them through signing back in

RECORDING OFFLINE PAYMENTS (WIRE TRANSFERS AND CHECK PAYMENTS)

1. Pull up a list of your attendees, through a report or by clicking on the "Attendees" icon
2. Find the attendee you wish to refund > click on their Registrant ID to open the "Attendee Info" window
3. Click the "Transaction" tab at the top of the window
4. Click on the "New Transaction" link in the top right corner
5. In the new window, select the option “Enter a manual (offline) payment”
6. Click “Next”
7. Enter the date of the transaction (the default is today's date)
8. Select the correct type of payment from the "Type" drop-down menu
   - Offline Credit Card Payment
   - Check Payment
   - Other Payments
   - Cash Payment
   - Wire Transfer Payment
9. Enter the amount of the payment
10. Enter any notes regarding the payment (such as check number, or explanation)
11. Click “Save” when finished
   - The window will close
   - You may need to refresh the "Attendee Info" page to see the changes you have made

Which credit cards does ACM accept?

• American Express, MasterCard, and Visa
• We do not accept Discover or Diner’s Club

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

Again, the decision is up to you, checks would be sent to your Conference Operations Liaison at 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?

You can create a "secret code" word or Discount Code that instructs our system to subtract a specified amount or percentage from the cost of any Agenda Item, Event Fee, or Merchandise item, or for the total order on the Checkout page.

NOTE: The discount code subtracts the amount (percentage or fixed) from the currently available price. The system will automatically change this to match with early/standard/late pricing schedules.
CREATE A NEW DISCOUNT CODE FOR AN EVENT 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).

4. 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"

5. Require All Attendees to Enter a Code to Select Item- Select this checkbox if you would like to force registrants to enter in a discount code. This is suggested for invitation only items that require an access code for selection. It is not available for the total order discount.

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

*If you clicked Bulk Load: Discount (Access) codes - Enter in the discount code(s) that you want to use for this Fee item. Bulk codes need to be manually entered into RegOnline. If you are entering multiple bulk codes, be sure to follow the proper formula.

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. Note: Limits cannot be added to discount codes used on the Merchandise tab

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)
This would result in:
code1 being a discount of $25 that can be used five times
code2 is a discount of $35.75 that can be used ten times
code3 is a discount of 30% that can be used an unlimited number of times
code4 is a discount of 42.5% that can be used 50 times

The formula for an access code is:
**Code, OR Code(3)** if you would like to limit the code to 3 uses

- Discount codes are not case-sensitive.
- If you create a discount code, then the discount code field will appear for all registrants. There is not a way to hide the entry box.
- If you have a limit on your discount code that has not been reached according to your reports, but gives an error that it is full, this can be because a registrant is currently in the form using the last code and will either complete their registration or become incomplete, freeing up the code after the time out period.
NOTE: Registrants are not able to use more than one discount code for the same fee.

NOTE: No special characters can be used in the discount code.

NOTE: Discount (Invitation) codes can be deleted even after they have been used.

ACM suggests creating a separate category for complimentary registrations. For example... committee, staff, vendor, video production, or any person that would not typically pay should have a registration type of their own. This allows for accurate conference and financial reporting.

Registration Cancelations/Refunds

Does ACM have a standard policy for canceling registrations and/or providing refunds?

It is up to the committee to determine what the registration policy is and if a cancelation fee applies. ACM HQ does not make this decision.

PROCESSING A REFUND

1. Find and edit the registrant’s record to open the “Attendee Info” window
2. Click the "Transactions" tab on the top navigation bar
- Verify the Total Balance has a negative balance in parentheses before continuing with the refund
- If the registrant does not have a negative balance, you must first cancel the registrant or adjust the registrant’s selected fees which will automatically create a negative balance for you
3. Click the "Refund" button next to the original credit card transaction
4. Click "Save & Close" to process the refund back to the registrant’s original credit card

How long after the conference can Regonline process credit card refunds?

Refunds can be processed through Regonline up to 90 days post-conference. Refunds can still be processed even after the conference registration site is closed and inactive. Refunds can still be processed even after all registration revenue has been transferred to ACM and to the conference bank account.

CANCELLING A REGISTRANT

1. From the Events screen, find the event that the registrant signed up for, and click the number in the Registrations column to view your attendees
2. Find the attendee you want to cancel and click on his/her name
- The person’s registration record will appear
3. Click “Actions” near the top, and select “Cancel Registration” from the drop-down menu
- If you wish you can send an email notification to the registrant by clicking the check box
- NOTE: An email will not send to the registrant if you have disabled the automated cancellation email (Emails page > Email Registrants When They > Cancel)
4. Click "Yes" to confirm that you want to cancel this registration

ADDING A CANCELLATION FEE
• New charges or fees added to a cancelled registration will not appear unless the balance adjustment transaction type "Other Charges" is used. Use this type if you wish to charge a cancellation fee

IMPORTANT NOTES ABOUT CANCELLING A REGISTRANT

• Cancelling a registration does not automatically refund that registration
• Any refunds need to be processed in a separate step (please refer to “Processing a Refund” on Page 9)
• Cancelling a registration does not cancel any RegOnline fees associated with the registration (both the registration fee and any transaction fees will still be charged to your account)

UNDOING A CANCELLATION

Once a registration is cancelled, a new option will appear in the "Actions" drop-down menu allowing you to "Undo Cancellation"

1. Open your event and click "Reports" on the left
2. Open the "Registrant List" report
3. Find the attendee you want to un-cancel, and click on his ID number
   - The person's registration record will appear
4. Click "Actions" near the top, and select "Undo Cancellation" from the drop-down menu

DELETING A REGISTRATION

Live Registrations (registrations processed while your event is active) cannot be deleted
- You can only delete Test Registrations (registrations processed while the event is in "Testing" Status)

RECORDING A REFUND FOR A CHECK PAYMENT OR WIRE TRANSFER

1. Pull up a list of your attendees, through a report or by clicking on the "Attendees" icon
2. Find the attendee you wish to refund
3. Click on the person's Registrant ID to open the "Attendee Info" window
4. Click the “Transaction” tab at the top of the window
   - Verify that there is a balance owed (balance due is indicated in parentheses)
   - If the attendee does NOT have a balanced owed (indicated in parentheses), then you should first create a manual revenue adjustment (credit) for the amount you need to refund
5. Click on the “New Transaction” link in the top right corner
   - This will open the "New Transactions" window
6. Select the option “Enter a manual (offline) refund”
7. Click “Next”
8. Enter the date of the transaction (the default is today's date)
9. Select the correct type of refund from the "Type" drop-down menu
10. Enter the amount of the refund sent to the attendee in the other system
   - Enter positive numbers only
11. Enter any notes regarding the refund (such as check number, or reason for refund)
12. Check the box if you would like the system to create a corresponding revenue adjustment to balance out the account
13. Click “Save” when finished
   - The window will close
   - You may need to refresh the "Attendee Info" page to see the changes you have made
   - The attendee’s Balance should now show 0
14. Contact your Conference Operations Liaison to let them know a wire transfer refund or check refund needs to take place. They will handle the actual processing of the payment.

*What happens if I need to charge a registrant for an item (workshop, banquet ticket, 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, we ask that you change the status to “inactive.” 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.

You will still be able to view and modify your event, as well as generate reports. You can set this up so Regonline will do it automatically:

**TO SET UP YOUR EVENT TO CHANGE STATUS AUTOMATICALLY**

1. On the Dashboard, under the Event Status section located on the right side, click on Change Status.
2. In the new window check the box to "Automatically change status for your event at a later date/time."
3. In the Set to dropdown, select the status you would like to change to.
4. In the On section, enter the date/time you would like the change to take place.
5. Click the "this message to registrants" link to change the message that will display when registrants reach the page.
6. Click Done when finished.

*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.

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.

An online Survey is a great way to create a simple, direct form to collect basic information when you need to ask a few questions that don’t require payment options. Since creating a RegOnline Survey is very similar to creating a RegOnline Event, you should find yourself immediately comfortable with survey setup and configuration.

There are two main purposes for Surveys: events follow-ups, and general information collection.

**TO SET UP AN EVENT FOLLOW UP SURVEY**

1. On the Event Dashboard of the event you'd like to create the Survey for, click on **Surveys** in the Analyze section of the left sidebar.
2. Click the **Add Survey** link in the upper right corner.
3. Enter a name for the survey in the **Survey Name** field. Click **Save**.
4. Click **Survey Form** in the left sidebar.
5. Click **Edit Survey Form** to enter the full event editor.
6. You can create **Participant Types** to differentiate between the types of participants that are completing your survey. Once you have created Participant Types, you can display specific survey questions to specific Participant Types (helpful if you'd like different questions for registrants, exhibitors, sponsors, speakers, etc...) If you would like to display the same set of questions to all of your survey participants, you do not need to create Participant Types. You can also enter an introductory message and require terms & conditions acceptance as well.
7. Click **Save** to save your Start page.
8. Click on **Participant Information** at the top (or next at the bottom) to move to the Participant Information section and select the information you wish to collect from your participants. By default, no information is collected and your participants will remain anonymous. You will have the same options for visible and required as you do on an event.
9. Click **Save** to save your Participant Info page.
10. Move to the **Custom Questions** section by clicking **Next** at the bottom or by clicking the Custom Questions heading at the top. To add a custom question, click **Create Custom Question**. Here you can add the survey questions you want to ask your participants. Be sure to click **Save Item** at the bottom of page after entering the details for each question.
11. When you've added all your questions, click **Save** in the upper right corner.
12. If you would like to add a confirmation message, move to the **Confirmation** section by clicking **Next** or the **Confirmation** heading.
13. Click **Save** to save your confirmation page. Click the **gray X** to exit the builder. You’ll be taken back to the Survey Form page.

14. If you’d like to activate now, you can click the orange **Activate** button.

15. To share your survey, click the Share Registration Form link on the survey dashboard.