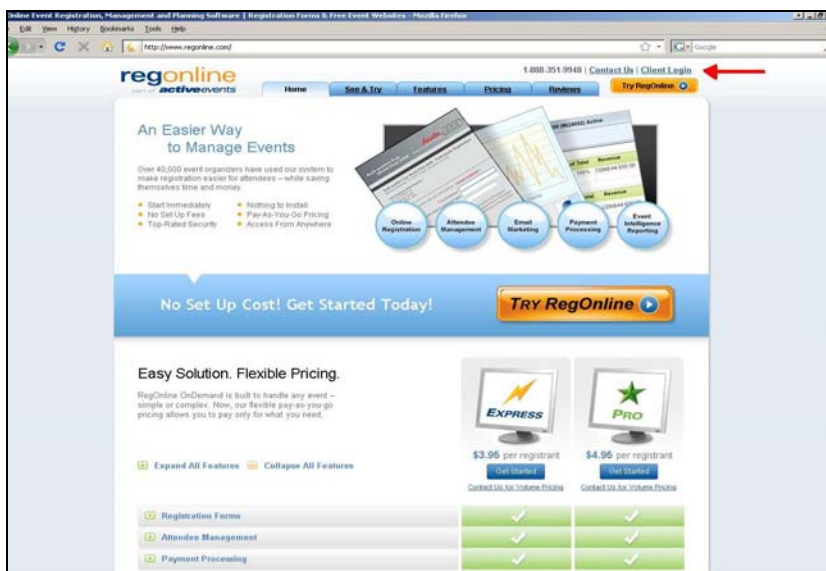


Creating an Event Registration Web Page with Special Features using **regonline**

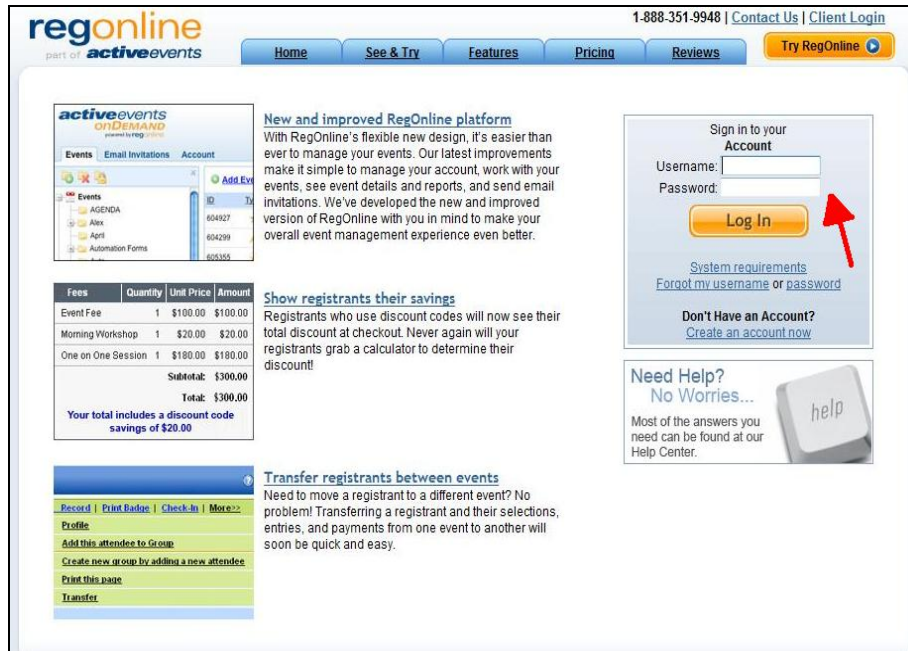
1. To begin, enter www.regonline.com in your browser's address bar. A red arrow on each screen shot shows you where to place your cursor.



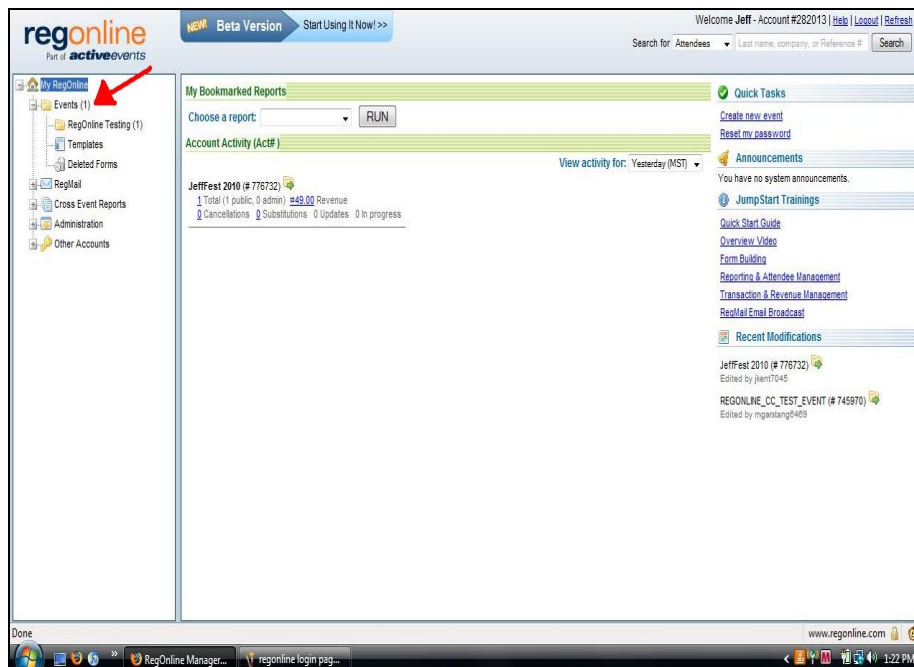
2. In the upper right corner, click on CLIENT LOGIN.



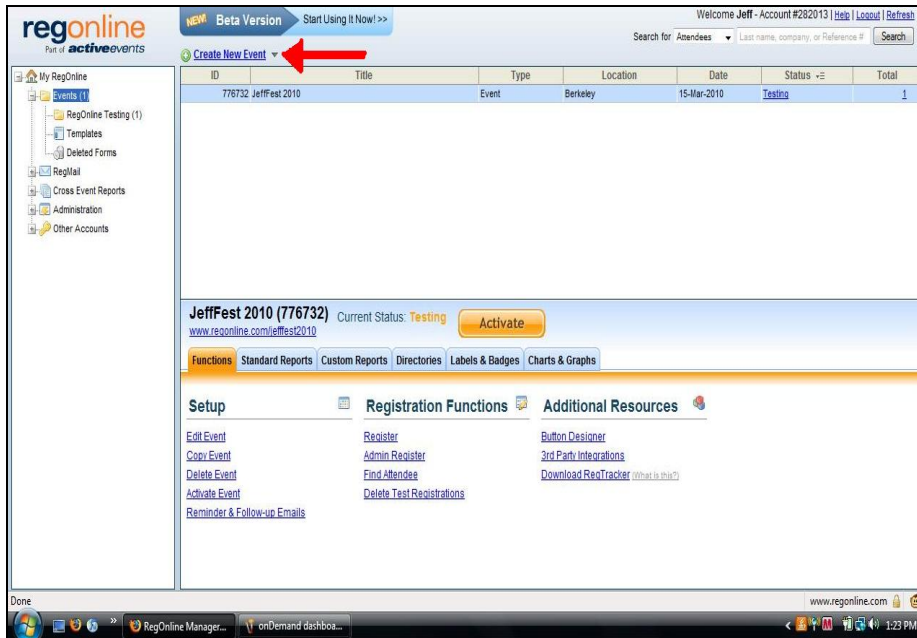
3. Enter your designated user name and password and click the LOG IN button.



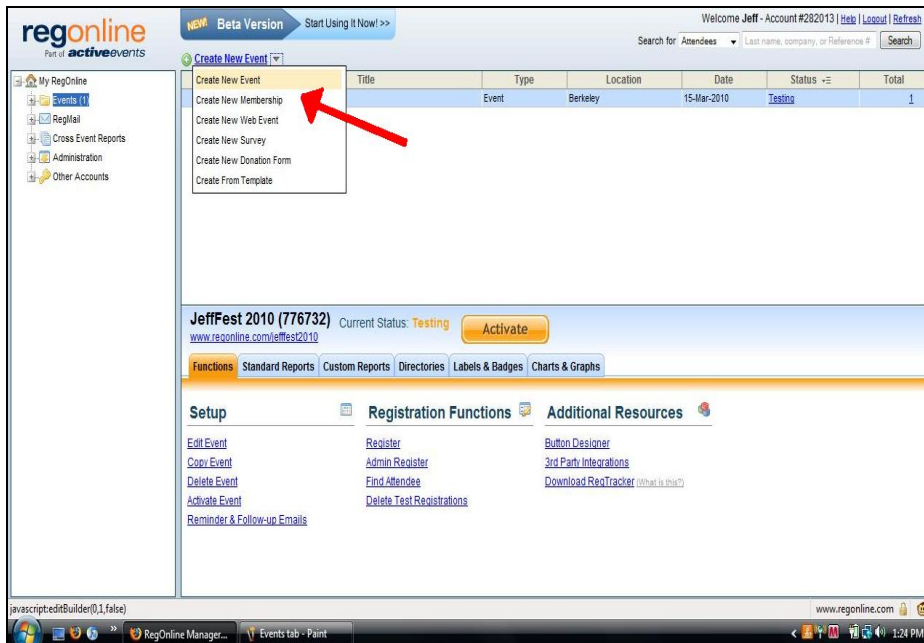
4. On the left sidebar, click on EVENTS.



5. Click on CREATE NEW EVENT.



6. You will see several options in a drop-down menu. For this exercise, choose CREATE NEW EVENT.



- On this screen, you are required to enter an event title, a web address (URL) for your registration page, and a contact email before you can proceed. You may also complete all of the optional event basics fields on this screen at this time.

Unnamed Event (776839) [Close](#)

[Preview](#) [Save & Stay](#) [Save & Close](#)

Registration Form Pages | Theme & Colors | Event Website | Emails

Start | Personal Information | Agenda | Lodging & Travel | Merchandise | Checkout | Confirmation

Event Basics [Help with This Section](#)

* Event Title:

* Registration Form URL: <https://www.regonline.com/>

Event Fee: [Advanced](#)

Start Date: Start Time:

End Date: End Time: [Date/Time options](#)

Location Name:

Location Phone:

Address Line 1:

Address Line 2:

City: State/Province: Postal Code (Zip):

Country:

* Contact Email Address: [Edit Contact Info](#)

Registrant Types [Help with This Section](#)

[Add registrant type](#)

Registration Rules [Help with This Section](#)

- For this exercise, your event has several different levels of registration with different prices. Scroll down and click on ADD REGISTRANT TYPE.

Country: USA

* Contact Email Address: [Edit Contact Info](#)

Event Category: Industry: [What's this?](#)

Registrant Types [Help with This Section](#)

[Add registrant type](#)

[Hide Items](#)

Name	Limit	Visible to	Event Fee	Actions
1 BCLT Sponsor		All		Copy X
2 Law Firm / Corporate		All	\$250.00	Copy X
3 In-House Counsel		All	\$100.00	Copy X
4 Academic / Non-Profit / Govt.		All	\$50.00	Copy X

Use drag-and-drop to reorder items in the list above

- Enter the name of the registrant type (and a separate name for your event management reports, if you wish). You may enter an optional total number of registrations of this type allowed, along with a message that will be displayed on the web page to registrants when this limit has been reached. When you have finished, click on **ADVANCED**.

Define Registrant Type

General [Help with This Section](#)

* Name On Form:

* Name On Reports:

Upon completion of registration set initial status to:

Limit:

Message displayed to registrant once limit is reached:

[Additional details](#)

Advanced

- Enter the event fee for this registration type, the dates during which this registration will be available - early bird discounts, for example - and a percentage, if any, of your registration processing fee. You may skip the other options on this screen. When you are finished, click the **SAVE & CLOSE** button.

Advanced [Help with This Section](#)

Visible to: Public Admin On-Site

Event Fee: [Advanced](#)

Processing Fee

You can charge your registrants all or part of the RegOnline processing fee. Choose a percentage of the fee you would like to share with the registrant (0-100%). [What's this?](#)

Share % of RegOnline's processing fees with the registrant.

Show This Type Starting:

Hide This Type Starting:

Use [the same](#) confirmation email that's set up at the event level.

[Integrate with membership](#)

If you wish to register your attendees with this registrant type automatically, copy the link below:
<https://www.regonline.com?eventID=774442&rTypeID=148389>

11. You may enter another registrant type by repeating Steps 8, 9, and 10. When you have entered all of your registrant types, scroll to the bottom of this screen and click the NEXT button.

Registrant Types [Help with This Section](#)

[Add registrant type](#)

Name	Limit	Visible to	Event Fee	Actions
1 BCLT Sponsor		All		
2 Law Firm / Corporate		All	\$250.00	
3 In-House Counsel		All	\$100.00	
4 Academic / Non-Profit / Govt.		All	\$50.00	

Use drag-and-drop to reorder items in the list above

Customize registrant type display options

Registration Rules [Help with This Section](#)

New Registrant

- Allow Group registrations
- Limit the number of registrants for this event
- Upon completion of registration, set the initial status to:

Returning Registrant

- Allow registrants to update their own registration.
- Allow registrants to substitute another person.
- Allow registrants to cancel their registration.

[Advanced Settings](#)

Page Options [Help with This Section](#)

- [Add header](#)
- [Add footer](#)

[Next](#) [Preview](#) [Save & Stay](#) [Save & Close](#)

Last modified by jken17045 on 02/24/2009 3:37:40 PM

12. The Personal Information screen will allow you to gather information from your registrants and to designate it as optional or required on your registration web page. Indicate the items you would like to include by putting a check mark in the appropriate boxes.

BCLT Patent Cross Licensing Conference (774442) [Close](#)

[Preview](#) [Save & Stay](#) [Save & Close](#)

Registration Form Pages **Theme & Colors** **Event Website** **Emails**

Start **Personal Information** Agenda Lodging & Travel Merchandise Checkout Confirmation

Recommended Fields [Help with This Section](#)

Field Title	Visible	Required
Email (Always visible and required)	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Verify Email (Ask attendee to enter email address again)	<input type="checkbox"/>	<input type="checkbox"/>
Prefix (Mr., Mrs., etc.)	<input type="checkbox"/>	<input type="checkbox"/>
First Name	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Middle Name	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Last Name	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Suffix	<input type="checkbox"/>	<input type="checkbox"/>
Job Title	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Name as it would appear on a badge	<input type="checkbox"/>	<input type="checkbox"/>
Company/Organization	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Address Line 1	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Address Line 2	<input checked="" type="checkbox"/>	<input type="checkbox"/>
City	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
US State/Canadian Province	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
State/Province/Region (Non US/Canada)	<input type="checkbox"/>	<input type="checkbox"/>
Zip (Postal Code)	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Country	<input type="checkbox"/>	<input type="checkbox"/>
Home Phone	<input type="checkbox"/>	<input type="checkbox"/>

13. When you have finished with Personal Information, scroll down to the bottom of the page and click the NEXT button.

The screenshot shows the bottom portion of a registration form. It includes sections for 'Upload Photo', 'Membership Number', 'Customer Number', 'Social Security Number', and 'Tax Identification Number', each with a checkbox. Below these is a 'Custom Field' section with an 'Add custom field' link. The 'Page Options' section shows 'Page name: Personal Information' and links for 'Add Header' and 'Add Footer'. At the bottom, there are navigation buttons: 'Previous', 'Next' (highlighted with a red arrow), 'Preview', 'Save & Stay', and 'Save & Close'. A footer note reads 'Last modified by jken7045 on 9/21/2009 1:27:58 PM'.

14. The next screen allows you to add agenda items to your event, such as special activities or workshops. This exercise does not include any agenda items, so click the NEXT button.

The screenshot displays the 'BCLT Patent Cross Licensing Conference (774442)' registration page. It features a navigation bar with tabs for 'Registration Form Pages', 'Theme & Colors', 'Event Website', and 'Emails'. Below this is a breadcrumb trail: 'Start', 'Personal Information', 'Agenda', 'Lodging & Travel', 'Merchandise', 'Checkout', and 'Confirmation'. The main heading asks 'Does your event have any agenda items?'. Underneath, there's a 'What are agenda items?' section with explanatory text and two large buttons: 'Yes + Add Agenda Item' and 'No > Go to Next Step'. A 'See Some Examples' section shows three thumbnail images of event pages. At the bottom, navigation buttons include 'Previous', 'Next' (highlighted with a red arrow), 'Preview', 'Save & Stay', and 'Save & Close'. A footer note reads 'Last modified by jken7045 on 9/24/2009 3:37:48 PM'.

15. The Lodging and Travel screen allows you to collect hotel and airline information from your attendees. Select an attendee type and then choose which fields to display on your registration web page by clicking the appropriate boxes.

BCLT Patent Cross Licensing Conference (774442) [Close](#)

Registration Form Pages | Theme & Colors | Event Website | Emails Preview Save & Stay Save & Close

Start | Personal Information | Agenda | **Lodging & Travel** | Merchandise | Checkout | Confirmation

Lodging Standard Fields [Help with This Section](#)

Collect standard lodging information from the following registrant types:

- All
- Law Firm / Corporate
- In-House Counsel
- BCLT Sponsor
- Academic / Non-Profit / Govt.

Collect the following information

Field	Visible	Required
Hotel Selection(s)	<input type="checkbox"/>	<input type="checkbox"/>
Room Type	<input type="checkbox"/>	<input type="checkbox"/>
Bed Type	<input type="checkbox"/>	<input type="checkbox"/>
Smoking Preference	<input type="checkbox"/>	<input type="checkbox"/>
Sharing With	<input type="checkbox"/>	<input type="checkbox"/>
Adjoining With	<input type="checkbox"/>	<input type="checkbox"/>
Check in / out date	<input type="checkbox"/>	<input type="checkbox"/>
Additional Info	<input type="checkbox"/>	<input type="checkbox"/>
Credit card information	<input type="checkbox"/>	<input type="checkbox"/>

16. You may customize the lodging and travel fields by clicking the appropriate ADD CUSTOM FIELD. When you are finished, click the NEXT button.

Lodging Custom Fields [Help with This Section](#)

[Add custom field](#)

Travel Standard Fields [Help with This Section](#)

Collect standard travel information from the following registrant types:

- All
- Law Firm / Corporate
- In-House Counsel
- BCLT Sponsor
- Academic / Non-Profit / Govt.

Travel Custom Fields [Help with This Section](#)

[Add custom field](#)

Additional Preferences (example: Dietary needs, Allergies...) [Help with This Section](#)

[Add custom field](#)

Page Options [Help with This Section](#)

Page name:

[Add Header](#) [Add Footer](#)

Previous **Next** Preview Save & Stay Save & Close

Last modified by jken7045 on 9/24/2009 3:37:46 PM

17. You may add merchandise for sale, such as Berkeley Law branded mugs and t-shirts, on this panel. For this exercise, there is no merchandise for sale. Click the NEXT button to continue.

BCLT Patent Cross Licensing Conference (774442) [Close](#)

Registration Form Pages: Theme & Colors | Event Website | Emails

Start | Personal Information | Agenda | Lodging & Travel | **Merchandise** | Checkout | Confirmation

Merchandise [Help with This Section](#)

[Add Merchandise item](#)

Display merchandise on the registration form

Page Options [Help with This Section](#)

Page name:

[Add Header](#)
[Add Footer](#)

[Previous](#) **Next** [Preview](#) [Save & Stay](#) [Save & Close](#)

Last modified by jken7046 on 9/24/2009 5:56:53 PM

18. Default payment option information has already been established for your sub-account. Click the ACCEPT CREDIT CARDS ONLINE button to allow registrants to pay by credit card on your web page.

BCLT Patent Cross Licensing Conference (774442) [Close](#)

Registration Form Pages: Theme & Colors | Event Website | Emails

Start | Personal Information | Agenda | Lodging & Travel | Merchandise | **Checkout** | Confirmation

Payment Options [Help with This Section](#)

Collect payment information:

Collect payment information even if amount due is zero:

Currency of this event:

Your company name to be displayed on invoices/receipts:

Credit Card Payment Methods [Help with This Section](#)

Accept Credit cards online Not accepting credit cards at this time

Other Payment Methods [Help with This Section](#)

Available to:

Other Payment Methods	Public	Admin	On-Site
Check	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Purchase Order	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Cash	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Pay at the Event	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Cost Center	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Wire Transfer	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
E-Check	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
PayPal Express Checkout <input type="text" value="Enter PayPal email address"/> Test	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Custom Payment Method <input type="checkbox"/> <input type="checkbox"/> Include input field	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

19. The default merchant gateway, CyberSource, was established when your sub-account was created. You may choose whether or not to require the three-digit security code from the back of the registrant’s credit card. All credit cards displayed on this screen can be accepted - this will provide your registrants with maximum flexibility.

You may include other payment methods and invoice options, if any, on this panel. Checks, purchase orders, and wire transfers can be processed by Business Services. When you are finished, scroll to the bottom of the screen and click the NEXT button.

Credit Card Payment Methods
[Help with This Section](#)

IMPORTANT: [Click here for RegOnline's policies and procedures for storing credit card numbers](#)

Accept Credit cards online Not accepting credit cards at this time

Merchant gateway: CyberSource - boaltcyber00 ←

(The name on credit card statements is dictated by your merchant gateway.)

Do not charge credit card on initial registration :

Store credit card numbers after initial payment processing :

Collect credit card security code : ←

Require credit card security code :
(public and on-site registrations only)

IMPORTANT: Credit card security codes can not be stored. If your merchant account requires security codes, you will need the registrant to handle any additional credit card charges.

Available to:

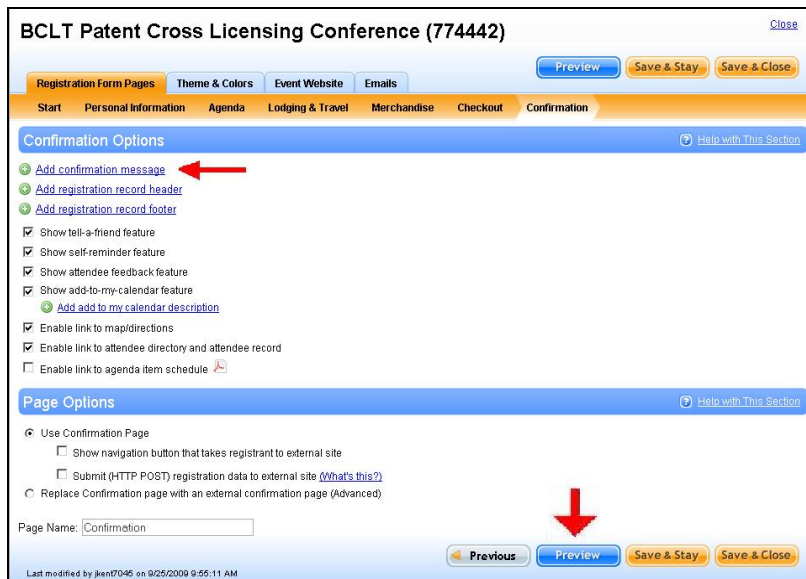
Accepted Credit Cards	Public	Admin	On-Site
Visa	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Mastercard	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Discover	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Diners Club	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
American Express	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Switch / Maestro	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

Other Payment Methods
[Help with This Section](#)

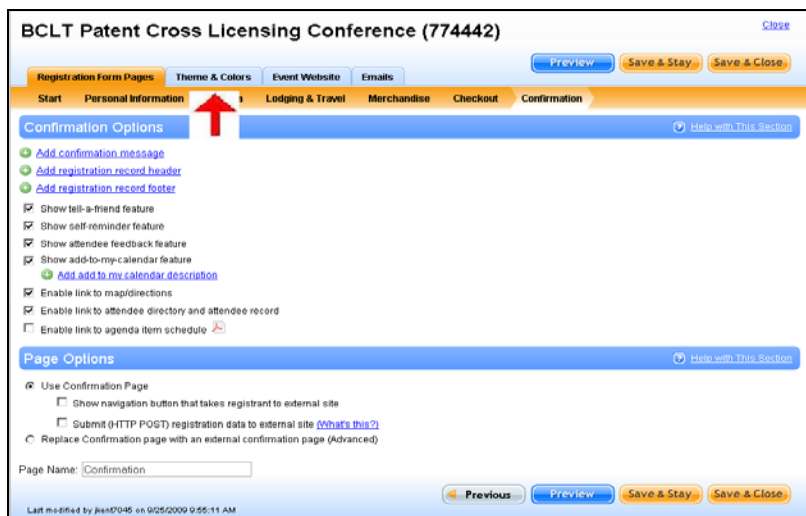
Available to:

Other Payment Methods	Public	Admin	On-Site
Check	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Purchase Order	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Cash	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Pay at the Event	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Cost Center	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Wire Transfer	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

20. Click on ADD CONFIRMATION MESSAGE to generate a registration message to each registrant. When you have finished your data entry, take a moment to proofread the information and make any necessary corrections. Click the PREVIEW button to view your work.



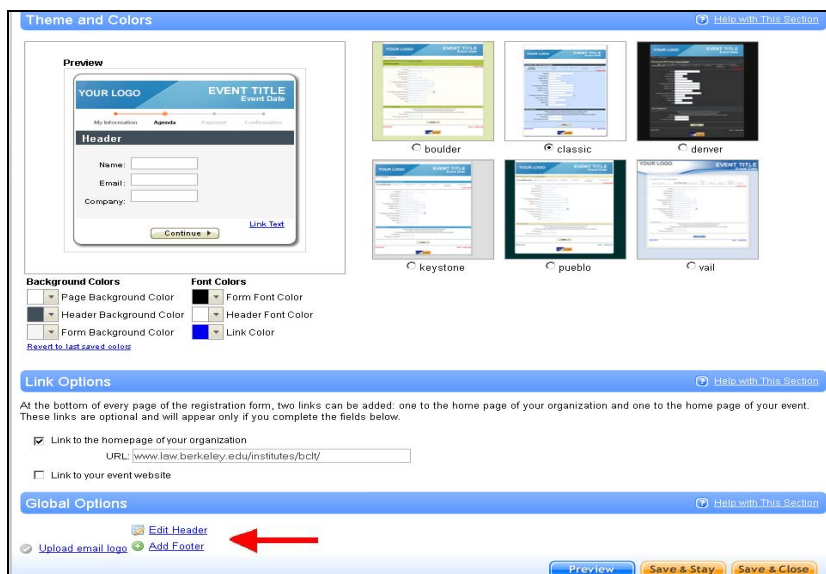
21. You may add a custom logo and color to your registration web page. Click on the THEMES & COLORS tab. This tab is available on every panel as you build your web page.



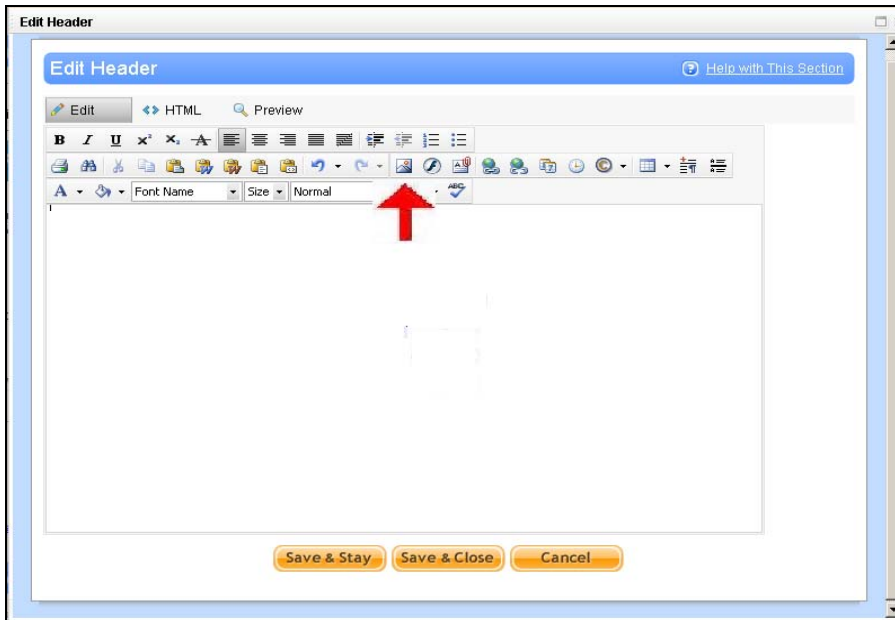
22. Select a custom theme for your web page and text colors, and insert links to your clinic, center or department home page.



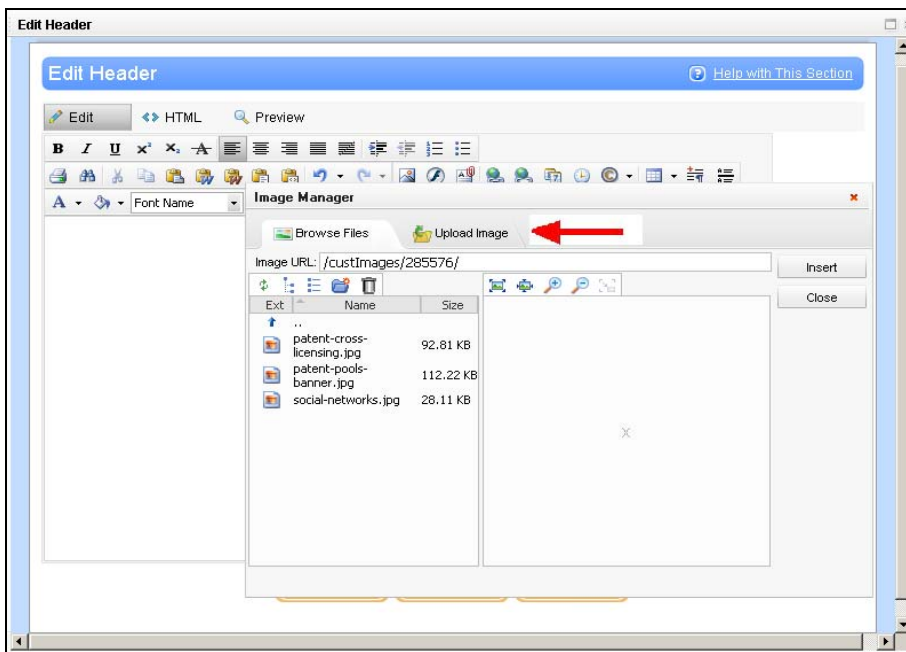
23. To add a custom header and footer to your web page, click on ADD HEADER or ADD FOOTER.



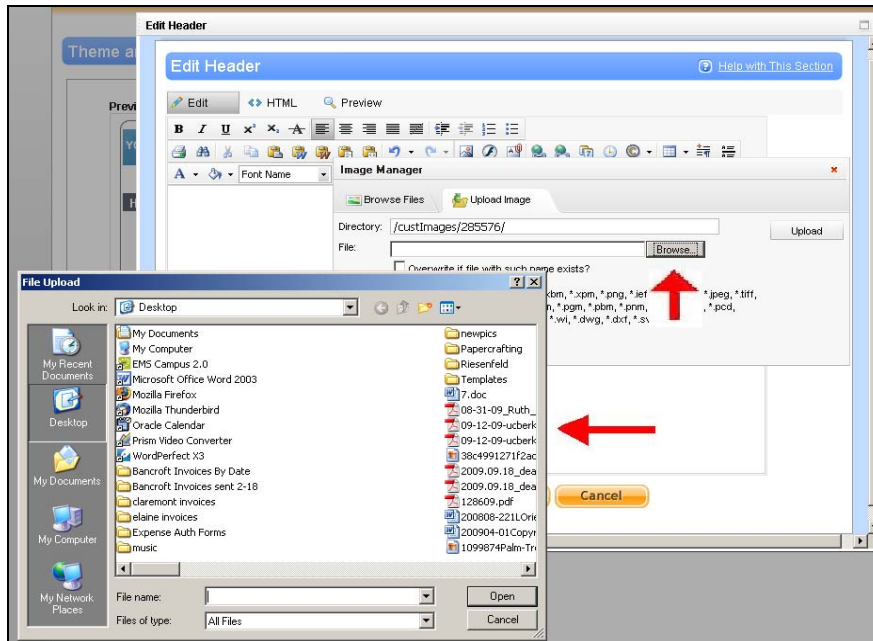
24. Click on the icon that resembles a miniature picture to upload a graphic.



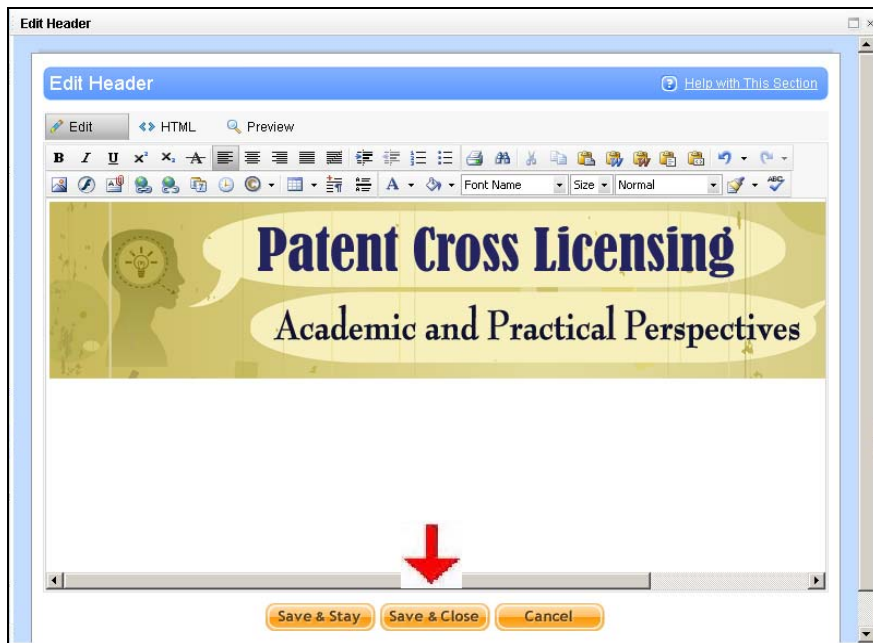
25. Click on UPLOAD IMAGE.



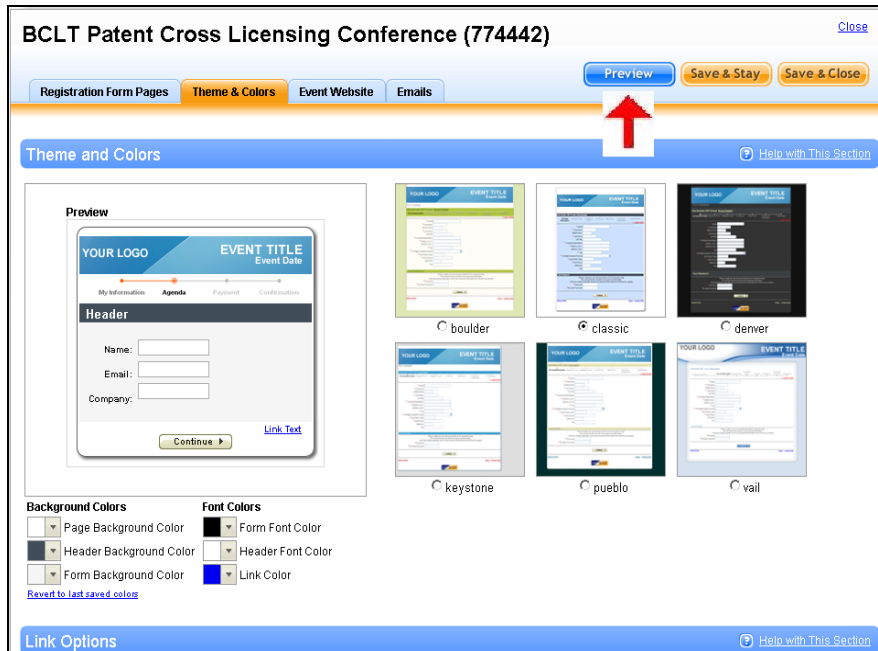
26. Click on BROWSE and choose a file from your computer.



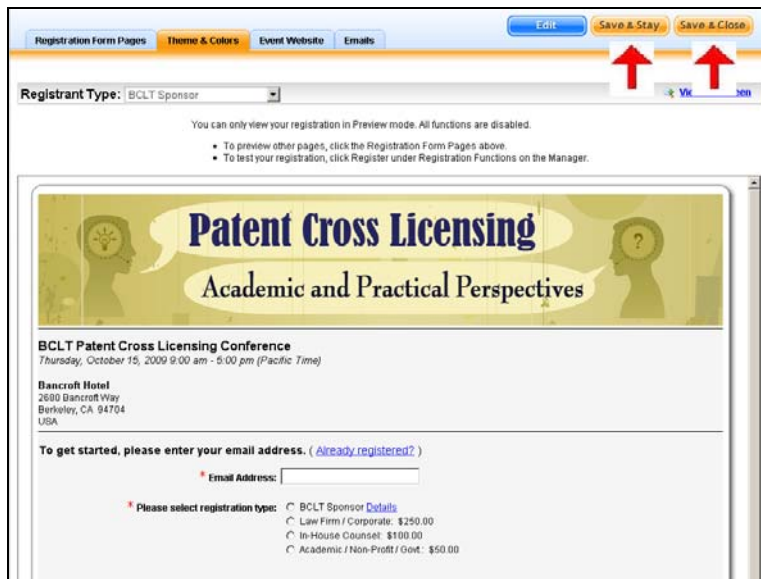
27. When you are satisfied with your graphic, click on the SAVE & CLOSE button.



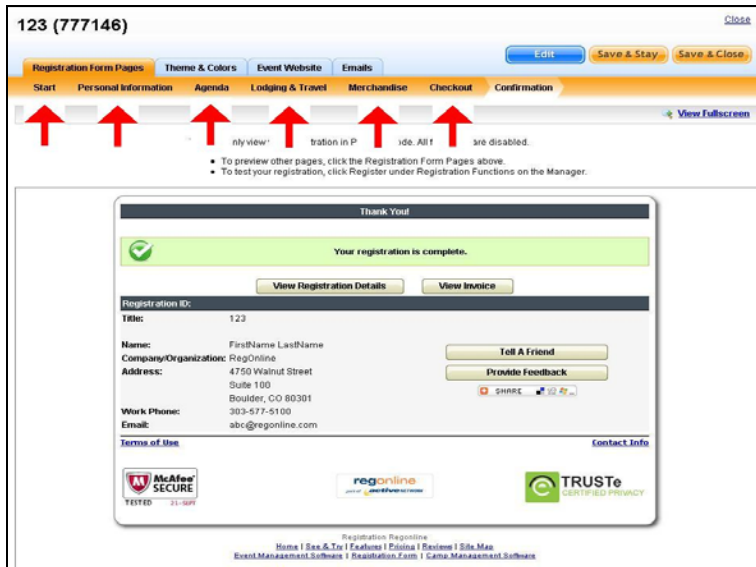
28. Click on the PREVIEW button to see how your web page looks.



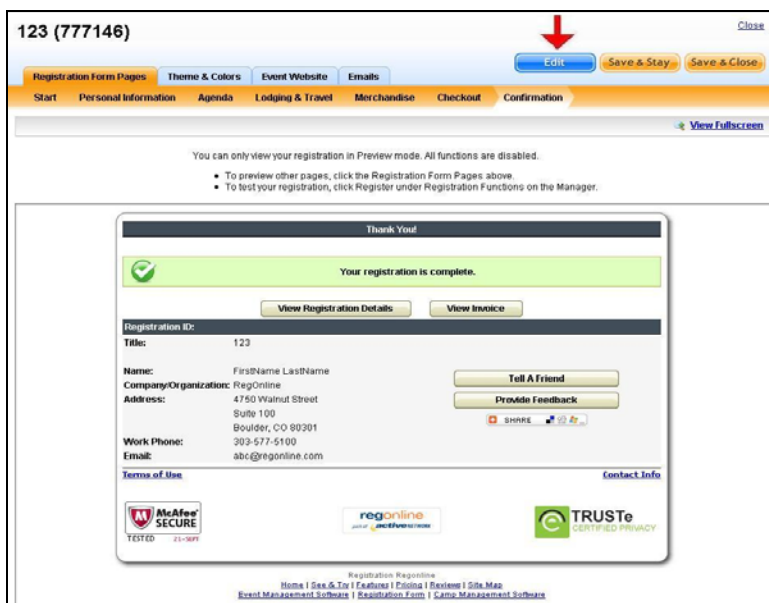
29. When you are finished, click on the SAVE & STAY or SAVE & CLOSE button. If you navigate away from regonline without clicking this button, all of the data you entered on the previous panels will be lost.



30. Click on the REGISTRATION FORM PAGES tab. Click on each orange tab on the next row to view the various panels of your registration web page exactly as your registrants will see them.



31. If you would like to make changes to the panel you are currently viewing, click the EDIT button. Remember to click the SAVE & STAY button after each edit.



32. When you are satisfied with your basic registration web page, you are ready to distribute or post the URL you designated in Step 7.

The screenshot shows a registration confirmation page for a conference. At the top, a banner reads "Patent Cross Licensing" and "Academic and Practical Perspectives". Below the banner is a "Thank You!" message. A green bar with a checkmark icon states "Your registration is complete." Below this are two buttons: "View Registration Details" and "View Invoice". The registration details are listed in a table-like format:

Registration ID:	
Title:	BCLT Patent Cross Licensing Conference
Date:	Thursday, October 15, 2009 9:00 am - 5:00 pm (Pacific Time)
	Add to Calendar
Name:	FirstName LastName
Company/Organization:	RegOnline
Address:	4750 Walnut Street Suite 100 Boulder, CO 80301
Work Phone:	303-577-5100
Email:	abc@regonline.com

On the right side of the details, there are three buttons: "Tell A Friend", "Schedule A Reminder", and "Provide Feedback". Below these is a "SHARE" button with social media icons. At the bottom left, there is a "Terms of Use" link. At the bottom right, there are "Home" and "Contact Info" links. The footer contains three logos: McAfee SECURE (TESTED 25-SEPT), regonline (part of activeNETWORK), and TRUSTe CERTIFIED PRIVACY.