**Part 1: Setting up accounts**

If you plan on charging a fee for an event then you will need a bank and PayPal Account. Use links below.

Need help creating a PayPal Account? [Click Here](https://www.paypal.com/us/webapps/mpp/sem/account-selection-signup?kid=p51348483722&gclid=EAIaIQobChMI1fj18YOu8AIV_hitBh2CoAaUEAAYASAAEgKzUvD_BwE&gclsrc=aw.ds)

Need help setting up a Bank Account? Contact technicalsections@spe.org

Need help creating a Zoom Account? [Click Here](https://support.zoom.us/hc/en-us/categories/200101697)

**IMPORTANT NOTE:**

Your Technical Section must have its own bank account If the event registration you are creating requires a fee or payment using the below choice:

* Events with Registration and Payment

If your Technical Section does not have its own bank account and uses funds on account with SPE, you may still use the following:

* Events with External Registration
* RSVP Only – No Payment

**Part 2: Event Payment Setup**

Before adding an event, decide if you plan to accept payment electronically (requires a bank account- see below). If not, skip this part and go to the Add Event section.

If you plan to accept payment, first set up your preferred event payment provider.

Click **Settings** at the top right-hand corner of the screen. Then click **Event Payment Providers.**



There are three options in the Payment Provider drop-down menu:

* CyberSource Secure Acceptance - **not recommended**
* PayPal Express Checkout - **highly recommended\***
* Stripe Checkout - **not recommended**

Then, fill out your section's payment gateway information; then click **Save**. You are responsible for your PayPal account and bank account.



**Note:** If your event requires payment, each registrant will be given a **Register Now and Pay Later** option at checkout. No action required. This option is intended only for paying at the door of an in-person event.

**Adding an Event**

Select the Add Event button.





Types of Events located on Event Type Dropdown

* Calendar Only – No Registration of any Kind – External - DO NOT USE
* Calendar Only – No Registration of any Kind – No Reg - DO NOT USE
* Events with External Registration
* Note: We are unable to verify membership this way.
* Examples of when to use: To promote a webinar that is located on the webevents.spe.org page.
* Events with Registration and Payment – **Recommended\***
* Automatic verification of membership
* Does not allow for late registration. Must manually register after registration deadline. FTS
* Events with Payment – DUPLICATE DO NOT USE
* RSVP Only – No Payment - **Recommended\***
* zADMIN USE ONLY – Events with Sessions and Options – External – DO NOT USE
* zADMIN USE ONLY – Events with Sessions and Options – Full – DO NOT USE
* zADMIN USE ONLY – Events with Sessions and Options – No Reg -DO NOT USE

 



**Pricing Options**

* **Regular** – Default. Used in most cases. No early or late options.
* **Early** – Optional. Use in addition to regular if you would like to offer an “early bird” discount.
* **Late** – Optional. Use in addition to regular if you want to charge an additional fee for late registrations.

**Registrant Classes**

Select the types of registrants.

**Simple** — Default. Everyone pays the same price.

**Member / Non-member / Guest / Student / Unemployed /** **Sponsor** — Member price lower than non-member price. Prices can vary by category.

**Member / Non-member / Guest / Student** — Automatically verified.

**Unemployed** — Not verified. Honor system.





**Automated Emails to Registrants and Officers are**

Registrants receive the following messages:

* Registration confirmation (date, location, payment status)
* Registration receipt
* When an event is cancelled
* When an event’s details are changed
* To confirm cancellation initiated on their end
* When an event has reached maximum capacity

The event creator receives the following messages:

* When someone registers for an event
* When a registrant cancels
* When an event has reached maximum capacity

Note: Event emails cannot be modified.

**Managing an Event**

Select the Settings button in the top right corner of the site. Then, select Manage Events.



Select the Edit button drop down menu.



* **Event Presenters** — You can give speakers a special or free price for the event through this link.
* **Manage Roster** — View or export roster of registrants and payments.
* **Pricing** — Modify pricing (only available if no one has registered).
* **Special Pricing** — do not use. Set up registrant category pricing instead.
* **Cancel Event** – Refunds are done through the payment provider. HL's platform cannot manage refunds in any way.
* **Hold/Remove Hold** – Hides the event from public. Assessable by admin for reference in the future. (Ex. Copying or Postponing Event)
* **Copy** — Duplicates an event for faster set up. (Ex. Webinars that are similar format)
* **Delete** — Permanently deletes the event. This cannot be undone. Use Hold option instead.