



# PRESENTS

## IEEE vTools

### Tutorials

**Topic:** Set Up

Payment/Registration Fees

# Table of Contents

- Set Up Payment / Registration Fees
  - Create an Event / Edit an existing event
  - REGISTRATION & PAYMENT
    - Enable payment functionality using HOST concentration banking account
    - Pricing (admission charge) options
    - Time of Payment Settings
- Published event with admission fee information
- Additional Set Up Payment topics
  - Multiple Price Levels
  - Fee Level Effective Dates

# Enabling Payment Functionality using HOST Concentration banking account

## REGISTRATION & PAYMENT

### Registration ?

?  Standard  External

### Registration starts \*

20 Jul 2016 12:00 AM

### Maximum Registrations (0-999) ?

Menu Selections ?  Yes  No

### Payment

Set Up Payment ?  None

### Pricing

Fees apply. [Click here to view Credit Card and PayPal fee information and Pricing Options Help.](#)

### Description ?

General Admission

### Amount ? Applies To ?

5.00

Everyone

Use fee level start time  Use fee level end time  Use tax (percent, ex: 8.0) :

If the HOST assigned to this event does not have a concentration banking account, all monies will be deposited into the Section's account. For more information see accepting credit card payments and IEEE Concentration Banking Program.

### Online payment account geocode

R10329

### Currency ?

USD

Add Level

### Time of Payment

This fee is required to be paid by credit card at the time of registration.

This fee is NOT required at the time of registration and can be paid in person by check or cash at the meeting.

### Make fee optional

This fee is optional ?

### Allow refunds

This fee is refundable ?

Use refund request deadline

Save as Draft

Cancel Create

Save & Publish

Next ▾



Please note that the payment functionality is **NOT** enabled automatically for every HOST (organizational unit).

If you want the funds to go directly to the HOST concentration banking account, please email [concentration-banking@ieee.org](mailto:concentration-banking@ieee.org) AND [vtools@ieee.org](mailto:vtools@ieee.org) with **Subject: Set up vTools Payment**

# Event/Report Administration

IEEE.org | IEEE Xplore Digital Library | IEEE Standards | IEEE Spectrum | More Sites

Sign Out

IEEE vTools **EVENTS**



VTOLS ▾ SEARCH EVENT/REPORT ADMINISTRATION VIEW FEEDS ABOUT CONTACT Welcome

You must be signed in to edit an event.

## About vTools Events

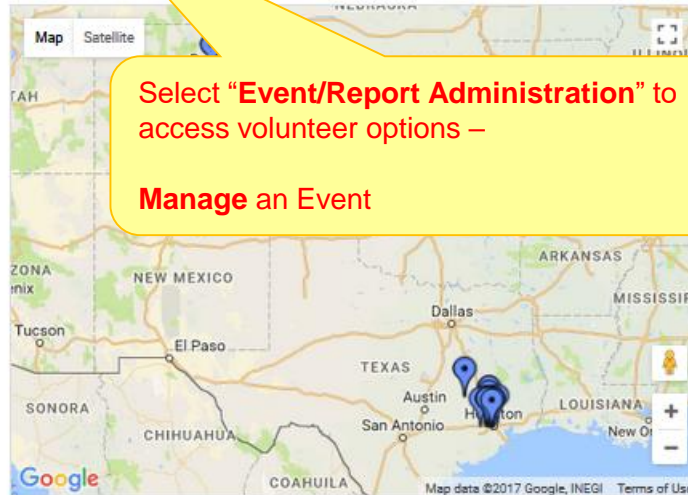
IEEE vTools Events is used for managing IEEE Section, Subsection, Chapter, Affinity Group and Student Branch meetings and events. All events that are scheduled in vTools Events are showcased in IEEE Collabratec™ and can be promoted on websites and eNotices.

[Learn more about vTools Events](#)

Map shows all upcoming or past IEEE events.

Region 5-Southwestern US ▾

Section HOUSTON ▾



Select "Event/Report Administration" to access volunteer options –

Manage an Event

## Organizational Unit ?

Organizational Unit SPO ID, Geocode, or Name

Select

## Recent Activity ?

Activity	Manage
[Legacy Report] IEEE HOU S...	Manage
rowave Imaging Systems...	Manage
IEEE Houston Section Holid...	Manage
IEEE Houston Section 14th A...	Manage
Future IEEE Houston Section ...	Manage
Young Professionals: Whole ...	Manage
Heat Tracing	Manage
Science and Technology of M...	Manage



Search Events



Event/Report Administration



View Feeds



# Search Events – Manage option

VTOLS ▾

SEARCH

EVENT/REPORT ADMINISTRATION

VIEW FEEDS

ABOUT

CONTACT

Welcome, XXXXXXXXXX

 **SEARCH EVENTS**

Learn how to integrate Event notices with your website

Title	Date	Reg	Section	Location	Virtual?	Reported On	Options
IEEE Houston Section Holiday Celebration: K...	07 Dec 201...	5	HOUSTON	Houston, Te...	No	File Report	View   Manage
Young Professionals: Whole Person Develop...	19 Nov 201...	5	HOUSTON	College Stat...	No	08 Dec 2017	View   Manage
Heat Tracing	14 Nov 201...	5	HOUSTON	Houston, Te...	No	08 Dec 2017	View   Manage
[Legacy Report] IEEE Houston Section - Co...	30 Oct 2017...	5	HOUSTON	Houston, Te...	No	30 Oct 2017	View   Manage
Microwave Imaging Systems for Medical Ap...	27 Oct 2017...	5	HOUSTON	Houston, Te...	No	File Report	View   Manage

Click **“Manage”** to access volunteer options on Event dashboard (eg. **Edit**, Create eNotice, File Report, **registration and payment** and attendance details)

# Enabling Payment Functionality using HOST Concentration banking account

## REGISTRATION & PAYMENT

### Registration ?

?  Standard  External  None

🕒 Event Start: 01 Sep 2016 04:00 PM, End: 01 Sep 2016 05:00 PM

### Registration starts \*

20 Jul 2016 12:00 AM



### Registration ends \*

01 Sep 2016 11:55 PM



### Maximum Registrations (0-999) ?

### Require IEEE Event Terms and Conditions Consent ?



### Menu Selections ? Yes No



Add menu selection

Please note that the payment functionality is **NOT** enabled automatically for every HOST (organizational unit).

If you do not see **Payment**, please email [concentration-banking@ieee.org](mailto:concentration-banking@ieee.org) AND [vtools@ieee.org](mailto:vtools@ieee.org) to have this functionality enabled for section, chapter and affinity group events.

Additional information on accepting credit card payments can be found on the [vTools.BLOG](#).

### Payment

Set Up Payment ?  None

Save as Draft

Cancel Create

Save & Publish

Next ▾



# REGISTRATION & PAYMENT

## REGISTRATION & PAYMENT

“REGISTRATION & PAYMENT” section includes:

**Payment** - enter pricing information

Registration ?

?  Standard  External  None

Event Start: 01 Sep 2016 04:00 PM, End: 01 Sep 2016 05:00 PM

Registration starts \*

20 Jul 2016 12:00 AM

Registration ends \*

01 Sep 2016 11:55 PM

Maximum Registrations (0-999) ?

Menu Selections ?  Yes  No

Add menu selection

First, registration dates are **required** to enable payment functionality.

Once registration dates are set, **Payment** will open to show **Set Up Payment** or **None** options.

Payment

Set Up Payment ?  None

**Payment** - pricing is turned **off** by default.

Select **Set Up Payment** to show “Pricing” information.

Save as Draft

Cancel Create

Save & Publish

Next

# REGISTRATION & PAYMENT

## REGISTRATION & PAYMENT

**Payment** - Select **Set Up Payment** to show Pricing and enter pricing information.

In the example, the event has one price level: General Admission, the amount is \$5.00 applies to **everyone**.

Select who may register at this price:

- Everyone
- All IEEE members (all grades)
- Non-IEEE members
- Affiliate (AF) grade only
- Associate Member (A) grade only
- Fellow (F) grade only
- Graduate Student Member (GSM) grade only
- Honorary Member (H) grade only
- Life member grades only
- Member (M) grade only
- Senior Member (SM) grade only
- Student Member (StM) grade only

Use to restrict who can register at this price level. Please click on the Pricing Options Help link above for more information.

For each price level, enter **Description**, **Amount** and '**Applies to**'.

**Note:** each price level will **only** be applicable to the member grade selected.

In this example, \$5.00 is available to '**Everyone**'

'Applies to' **restricts** the price to only the member grade selected.

Select **Add Level** to add additional pricing.

This fee is required to be paid by credit card at the time of registration.

This fee is optional

This fee is refundable

Use refund request dead

This fee is NOT required at the time of registration and can be paid in person by check or cash at the meeting.

Save as Draft

Cancel Create

Save & Publish

Next





# Price Restriction by IEEE Member Grade

Specify who qualifies for a given price level based on association with IEEE or **member grade**.

Example: You can provide discounted pricing to IEEE members with deepest discount offered to IEEE student members.

Registrants will be required to provide their member number to qualify for the discounted price level. The system will use the member number to check the registrant's member status (active/inactive) and current member grade.

**Pricing**

**Description** ?

IEEE Student Members

Use fee level start to

**Applies To** ?

Student Member (StM) grade

Use tax (percent, ex: 8.0) :

**Add Level**

- Everyone
- All IEEE members (all grades)
- Non-IEEE members
- Affiliate (AF) grade only
- Associate Member (A) grade only
- Fellow (F) grade only
- Graduate Student Member (GSM) grade only
- Honorary Member (H) grade only
- Life member grades only
- Member (M) grade only
- Senior Member (SM) grade only
- Student Member (StM) grade only

If the HOST assigned to this event does not have a concentration banking account, all monies will be deposited into the Section's account. For more information see [accepting credit card payments](#) and [IEEE Concentration Banking Program](#).

# Time of Payment Settings

If the HOST assigned to this event does not have a concentration banking account, all monies will be deposited into the Section's account. For more information see [accepting credit card payments](#) and [IEEE Concentration Banking Program](#).

Online payment account geocode: R10329

Currency: USD

Time of Payment

- This fee is required to be paid by credit card at the time of registration.
- This fee is NOT required at the time of registration and can be paid in person by check or cash at the meeting.

Make fee optional

- This fee is optional

Allow refunds

- This fee is refundable
- Use refund request deadline

Buttons: Save as Draft, Cancel Create, Save & Publish

Select **refund** options, if applicable.

**Note:** Refunds are issued by organization hosting event. Refunds are not processed through vTools.

## Time of Payment -

Selection of "This fee is NOT required at time of registration" will provide registrants the option to pay the fee during registration or only register for your event.

## Make fee optional -

An example would be if you wanted to charge a fee for an optional dinner. If you choose to select this option, registrants will be able to register for the event *without* making a payment.

# Published event

**ANNUAL IEEE PCJ PICNIC**

Annual IEEE PCJ Picnic

**“REGISTRATION”** includes:

- **Registration dates/times**
- **Pricing**
- **Menu selections if set up**

Hover cursor over ‘?’ to view pricing.

DATE AND TIME	LOCATIONS	REGISTRATION
<p>Date: <b>01 September 2016</b></p> <p>Time: <b>06:00 PM to 07:00 PM</b></p> <p>All times are US/Eastern</p> <p> <a href="#">Add Event to Calendar</a>  <a href="#">Outlook (vCal)</a>  <a href="#">iCal</a>  <a href="#">Google Calendar</a> </p>	<p>1 River Road Piscataway, New Jersey United States Building: Johnson Park</p>	<p>Email event contact</p> <p>Admission fee applies ?</p> <p>Starts <b>20 July 2016 12:00 AM</b></p> <p>Ends <b>01 September 2016 11:55 PM</b></p> <p>All times are US/Eastern</p> <p style="text-align: center;"><a href="#">Register Now</a></p>

Name	Ends on	Restriction	Amount
General Admission	01 Sep 2016 11:55 PM	Everyone	5.00USD



# Multiple Price Levels

## Payment

Set Up Payment ?

Payment functionality allows you to set up multiple levels of pricing for different amounts . For each price level, select who may register for the price by choosing **restriction** by member grade or none (select 'Everyone' or 'Non-IEEE members') .

## Pricing

Fees apply. Click here to view Credit Card and PayPal fee information and Pricing Options Help.

Description ?	Amount ?	Applies To ?
IEEE Members	1.00	All IEEE members (all grade
<input type="checkbox"/> Use fee level start time	<input type="checkbox"/> Use fee level end time	<input type="checkbox"/> Use tax (percent, ex: 8.0) :
General Admission - Everyone	2.00	Everyone
<input type="checkbox"/> Use fee level start time	<input type="checkbox"/> Use fee level end time	<input type="checkbox"/> Use tax (percent, ex: 8.0) :
Student Members Admission	0.00	Student Member (StM) gra
<input type="checkbox"/> Use fee level start time	<input type="checkbox"/> Use fee level end time	<input type="checkbox"/> Use tax (percent, ex: 8.0) :
Guests of IEEE Members		
<input type="checkbox"/> Use fee level start time	<input type="checkbox"/> Use fee level end time	<input type="checkbox"/> Use tax (percent, ex: 8.0) :

This discounted price is restricted to all IEEE member grades.

There is no member grade restriction for this price.

This discounted price is restricted to Student Member grade only.

During **registration**, a registrant's **member number** will be used to verify the registrant's member status (active/inactive) and member grade to determine if they are eligible for selected price.



# Fee Level Effective Dates

Specify the **fee level** effective dates/times. This optional feature may be used to offer discounts for early registrations. You may set just a start date, both start and end dates or just an end date.

Registration starts \* 01 Aug 2016 12:00 AM  
Registration ends \* 31 Aug 2016 12:00 AM

to view Credit Card and PayPal fee information and Pricing Options Help.

Description ? Early Admission  
Amount ? 1.00 Applies To ? Everyone  
 Use fee level start time  Use fee level end time 10 Aug 2016 12:00 AM  
 Use tax (percent, ex: 8.0) :

This price level fee will **start** on the first day of registration and **ends** on 10 August 12:00am.

The **registration form** will show pricing based on the fee level dates/times set up and if the registrant qualifies for the discounted price (based on member status/grade)

Description ? General Admission  
Amount ? 2.00 Applies To ? Everyone  
 Use fee level start time 10 Aug 2016 12:00 AM  
 Use fee level end time 24 Aug 2016 12:00 AM  
 Use tax (percent, ex: 8.0) :

This price level fee will **start** on 10 August 12:00am and **ends** on 24 August 12:00am.

Description ? Late Admission  
Amount ? 5.00 Applies To ? Everyone  
 Use fee level start time 24 Aug 2016 12:00 AM  
 Use fee level end time  
 Use tax (percent, ex: 8.0) : Remove Level

This price level fee will **start** on 24 August 12:00am and **ends** on the **last** day of registration – 31 August 12:00am.

# Payment Functionality using HOST concentration banking account

## REGISTRATION & PAYMENT

Registration ?

?  Standard  External

Menu Selections ?  Yes  No Custom registration questions ?  Yes  No

Payment

Details are missing to enable payment set up. To enable payment options, please fill in all required fields such as Host and Registration start/end dates. Required fields are marked with a red asterisk.

In order to set up Payment, ensure you have selected registration start and end dates first. Once the registration dates have been selected, set up payment options will be shown.

Please note that the payment functionality is **NOT** enabled automatically for every HOST (organizational unit).

If you do not see **Payment**, please email [concentration-banking@ieee.org](mailto:concentration-banking@ieee.org) AND [vtools@ieee.org](mailto:vtools@ieee.org) to have this functionality enabled section, chapter and affinity group events.

Additional information on accepting credit card payments can be found on the [vTools.BLOG](#).

There may be a slight system delay to open **Payment**.

Once **HOST** and **registration dates** are provided, the message shown below will disappear.

You will see this message if **HOST** and **registration dates** have **not** been provided.

You will see this message if registration dates have **not** been provided. Once registration dates are set up, **Payment** and **Pricing** options will be shown.

Next ▾



# Thank you!

## IEEE vTools

### End of the tutorial

Thank you for viewing the tutorial. Please remember to visit vTools' site (<http://vtools.ieee.org>) to learn more about our projects. If you have any questions regarding [vTools.Events](#), please email us at: [vtools@ieee.org](mailto:vtools@ieee.org).

Thank you!