

eSpot

eReg: Fees & Payments

What is it?

The eReg module includes the functionality to organize the finances and payments for your events, regardless of the size of the event. From charging fees, to setting up taxes, to generating invoices, eReg streamlines the administration of all financial aspects of your events. This feature is found in the 'Fees & Payment' tab within the eReg module. The feature set includes the ability to:

- Set price points and specify fees for each category, session or option.
- Allow attendees to take advantage of discounts during the registration period.
- Control the way in which registrants can pay for the event.
- Set up and charge tax from registrants when they register for the event.
- Configure and generate invoices at the time of registration.

Why use it?

In order to ensure event success, it is important to manage the event financials and take the stress out of organizing finances. Event organizers and planners need a secure mechanism to collect attendee payment, specify fees for different categories and sessions, and provide registrants convenient ways to pay in their preferred currency.

For many organizations, it is a requirement to collect taxes and the type of event often dictates what type/how much tax needs to be collected. If you do collect taxes for your event, you need to track all of these amounts to meet your government/ regulatory reporting and remittance requirements.

With the etouches platform, attendees' payments are easily recorded and scheduled for processing using different payment modes, discounts provided, taxes levied and invoices generated at the time of registration. All these features make event registration, payment processing, invoicing and reporting easier, more flexible and provide a more comprehensive approach to event finance management.



How do I use it?

The 'Fees & Payment' feature set is found under the eReg module which is a part of etouches' Quad and Pro packages. This feature set consists of 5 different pages:

- Standard Fees
- Discount Codes
- Payment Settings
- Tax Settings
- Invoice Settings

Feature Focus: Standard Fees

The standard fees page has two sections: price points and standard fee structure. Prices are separated into columns by price points. The standard fee section is divided by category, session details, option details, and anything that can have a fee associated with it.

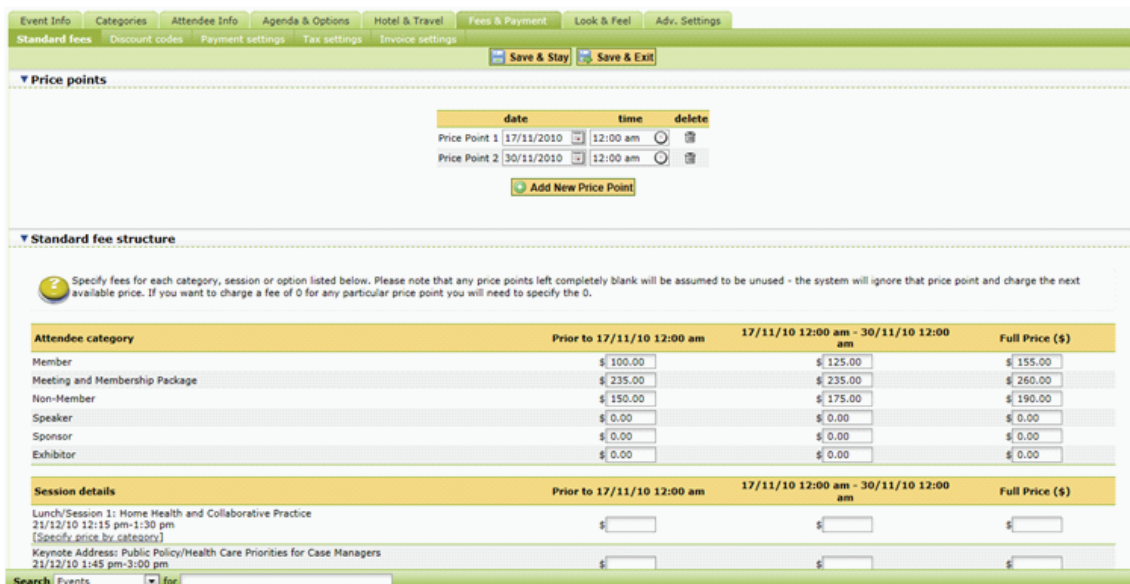
The screenshot shows the 'Fees & Payment' module with the 'Standard fee structure' section active. It includes a 'Price points' section with two points defined for 17/11/2010 and 30/11/2010. Below is a table for 'Standard fee structure' with columns for 'Attendee category', 'Prior to 17/11/10 12:00 am', '17/11/10 12:00 am - 30/11/10 12:00 am', and 'Full Price (\$)'. The table lists categories like Member, Meeting and Membership Package, Non-Member, Speaker, Sponsor, and Exhibitor with their respective prices. Below this is a 'Session details' section with a similar table structure for specific sessions like 'Lunch/Session 1: Home Health and Collaborative Practice'.

Attendee category	Prior to 17/11/10 12:00 am	17/11/10 12:00 am - 30/11/10 12:00 am	Full Price (\$)
Member	\$ 100.00	\$ 125.00	\$ 155.00
Meeting and Membership Package	\$ 235.00	\$ 235.00	\$ 260.00
Non-Member	\$ 150.00	\$ 175.00	\$ 190.00
Speaker	\$ 0.00	\$ 0.00	\$ 0.00
Sponsor	\$ 0.00	\$ 0.00	\$ 0.00
Exhibitor	\$ 0.00	\$ 0.00	\$ 0.00

Session details	Prior to 17/11/10 12:00 am	17/11/10 12:00 am - 30/11/10 12:00 am	Full Price (\$)
Lunch/Session 1: Home Health and Collaborative Practice 21/12/10 12:15 pm-1:30 pm (Specify price by category)	\$	\$	\$
Keynote Address: Public Policy/Health Care Priorities for Case Managers 21/12/10 1:45 pm-3:00 pm	\$	\$	\$

Price Points – Price points allow you to charge a different amount depending on the date and time when a person registers. This allows you to automate the prices that are shown to attendees without having to manually update the prices following a given date.

Adding a Price Point - to add a price point simply click the button labeled “Add New Price Point” under the current price points (if any). This will add a blank price point in the price point box. Once you have added the price point you can enter in the date you want the price point to end on, and if you choose, you can also select a time the price point will be on.



The screenshot shows the 'Fees & Payment' section of the eTouches software. It features two main tabs: 'Price points' and 'Standard fee structure'.

Price points tab: This section allows users to manage price points. It includes a table with columns for 'date', 'time', and 'delete'. Two price points are currently listed: 'Price Point 1' ending on 17/11/2010 at 12:00 am, and 'Price Point 2' ending on 30/11/2010 at 12:00 am. An 'Add New Price Point' button is located below the table.

Standard fee structure tab: This section allows users to specify fees for each category, session, or option. It includes a table with columns for 'Attendee category', 'Prior to 17/11/10 12:00 am', '17/11/10 12:00 am - 30/11/10 12:00 am', and 'Full Price (\$)'. The table lists various categories such as Member, Meeting and Membership Package, Non-Member, Speaker, Sponsor, and Exhibitor, each with corresponding fee values.

Standard Fee Structure – You can specify fees for each category, session or options listed in this page.

- **Attendee Category** - Here you can enter in any pricing that applies to a category.
- **Session Details**- The columns representing the price points will stay the same. The added feature for sessions is the ability to specify a price by a certain category for each session.
- **Option Details**- The columns representing the price points will stay the same. The added feature for options is the ability to specify a price by a certain category for each option.

Feature Focus: Discount codes

The Discount code page has two sections: the discount code and the viral ticketing section.

The screenshot displays the 'Discount Codes' and 'Viral Ticketing' sections of the eTouches interface. The 'Discount Codes' section indicates that no discount codes are currently found and provides instructions on how to add them. The 'Viral Ticketing' section explains the concept and offers an option to enable it for the event.

Discount Codes – The discount code page is where the discount codes associated with your event will be listed. A discount code is a code the registrant will enter during the beginning of their registration that will provide them with a certain discount either based on percentage or a fixed price.

This is an identical screenshot of the eTouches interface showing the 'Discount Codes' and 'Viral Ticketing' sections. It details the current status of discount codes and the option to enable viral ticketing.

Viral Ticketing – Viral ticketing is an exciting way where you can use the power of networks to market the event by incentivizing your delegates to promote your events through personal networks. Using the viral ticketing functionality, your confirmed participants receive a discount code which they promote to their friends and colleagues. As their contacts register, their registration fee is reduced. etouches' viral ticketing function automates payments and refunds to attendees who pass and receive the viral code resulting in increased sales without additional effort.

Feature Focus: Payment Settings

The payment settings page consists of three sections: payment methods, currencies and other information. The payment settings page allows you to edit the currencies used by your event and the ways in which your registrants can pay for your event. Other payment related text such as terms and conditions, payment instructions or your cancellation policy can also be specified here.

Tip

Viral ticketing is a powerful way to market your events by offering discounts to registrants who refer other registrants. You can reward your attendees by using this viral ticketing feature along with promoting your event using the Promotion/Social section in the eReg module.

The payment method allows you to regulate the way in which registrants can pay for the event, e.g. credit card, check, cash and via wire transfer.

Event Info Categories Attendee Info Agenda & Options Hotel & Travel Fees & Payment Look & Feel Adv. Settings

Standard fees Discount codes **Payment settings** Tax settings Invoice settings

[Save & Stay](#) [Save & Exit](#)

▼ How are you taking payment for your event?

Payment method	public	admin	edit	delete
Credit Card	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		
Check	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		

[Add payment method](#)

▼ Which currencies are you using?

The standard currency is the currency in which all prices are specified, and the currency unit which is sent to your payment gateway when a payment is submitted.
If you wish to display other currencies on your site alongside the standard currency, click the "Add another currency" button below.

Standard currency US Dollar (\$)

Drag and drop the currencies to reorder	Payment gateway	Exchange Rate	delete
US Dollar (\$)		\$1=\$ 1	

[Add another currency](#)

▼ Other payment information

Terms & Conditions

Cancellation policy

Search Events for

You can use the currency section to dictate the currencies displayed by your event when the registrant has to pay. If your event involves attendees from more than country, you can add more currencies to your event.

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Standard currency US Dollar (\$)

Drag and drop the currencies to reorder	Payment gateway	Exchange Rate	delete
US Dollar (\$)		\$1=\$ 1	

[Add another currency](#)

▼ Other payment information

Add another currency

Currency Australian Dollar

Exchange rate 1 = \$

[Cancel](#) [Save & close](#)

English translations

Terms & Conditions

Cancellation policy

Privacy policy

Payment instructions

Receipt issued by

Search Events for

▼ Other payment information

Terms & Conditions	
Cancellation policy	
Privacy policy	
Payment instructions	
Receipt issued by	

☐ Do not pre-populate billing information from attendee information
☐ Hide Payment Instructions if amount owed is zero
☐ Allow registration to continue if transaction fails

Save & Stay Save & Exit

The “Other Payment Information” section is where you enter in the regulations or important information about the Payment. All these sections have an HTML editor to format the text.

- Terms & Conditions- Any terms and/or conditions that apply to your payment settings page should be entered here.
- Cancellation Policy –You can input any information about a cancellation policy.
- Privacy Policy- You can input any information regarding the privacy policy here.
- Payment Instructions- You can input payment instructions in this field.
- Receipt Issued By- You can input the receipt issued by text.

You can also do the following:

- **Do not pre-populate billing information from attendee information** – By default, eReg will use the information entered on the attendee information page to pre-populate the billing information fields. These fields can be overtyped if desired. If you prefer to force your registrants to type in their billing information again on the payment page, then check this box.
- **Hide Payment instructions if amount owed in zero** - Checking this box will ensure that the payment instructions are not displayed if a registrant’s balance is zero.
- **Allows registrants to continue if the transaction fails** – If checked, when a credit card payment fails, the registrant is nevertheless confirmed and they will automatically be sent the “failed transaction email”.

Feature Focus: Tax Settings

The 'Tax Setting' feature set in our system allows you to collect tax from registrants when they register for the event. By simply applying a tax rate to a field, you can either charge tax to the registrants or allow them to opt out of tax. Our system is flexible enough to take care of the calculations and tax reporting for you.

Tax exemptions are often the case given the various types of an event that an organization may hold. etouches' new feature allows you to achieve tax exemption stage with just a click.

Tax Rates – It allows you to specify a tax rate if you want to apply sales tax to items with fees.

Tax Rates – In the 'Tax rules' section, you can set various rules for tax.

- **Tax applies to registrants from all countries** – If checked, then registrants from all countries will be charged tax.
- **Tax applies to registrants from all states** - If checked, then registrants from all states will be charged tax.
- **Allow registrants to opt out of tax** – If checked, then registrants will be given the ability to opt out of tax when they register.

- **Deduct tax if a valid VAT number is given** – If checked, then registrants will not be charged tax if they have entered a valid VAT number.
- **Prevent registration if an invalid VAT number is supplied** - If checked, then registrants will not be able to register until they have entered a valid VAT number.
- **Charge a state tax in addition to the standard sales tax** – If checked, then registrants will be charged a state tax in addition to the standard sales tax.

State	Tax Rate (%)	Tax is cumulative
Alabama	0	<input type="checkbox"/>
Alaska	0	<input type="checkbox"/>
Arizona	0	<input type="checkbox"/>
Arkansas	0	<input type="checkbox"/>
California	0	<input type="checkbox"/>
Colorado	0	<input type="checkbox"/>
Connecticut	0	<input type="checkbox"/>
Delaware	0	<input type="checkbox"/>

Feature Focus: Invoice Settings

Invoicing is an integral part of any events-based business which is why etouches includes a comprehensive and easy-to-use invoicing system. This feature set allows attendees to generate comprehensive invoices at the time of registration. Our system generates comprehensive invoices and allows customized billing for each event. The invoice settings page has two sections: General Invoice Settings and the invoice designer.

General Invoice Settings

- **Allows attendees to generate an invoice from registration record page** – This settings allows your registrants to generate their own invoice when they reach the registration record page.
- **Use event name and email address when sending manual invoices** - By selecting this option, invoices sent by administrators from the generate invoice page will be sent from the event name and email address and not the name and address of the logged in user.
- **Itemize selections of attendee invoices** - The system will show the total cost of the booking as a single figure on the invoice. This setting allows you to break out that figure by individual prices of the items purchased.

Tip

The Invoice designer helps brand the look & feel of the invoice. Launch the invoice designer to itemize selections on invoices, add any type of content you want to the invoice.

Invoice Designer

This system will automatically provide a basic invoice for your registrants: however, if you want to significantly customize the way your invoice looks, we recommend using the invoice designer.

With the help of the invoice designer, ..you can customize elegantly formatted invoices, brand the look and feel of invoices and add unlimited attendee products.

The screenshot shows the 'Invoice designer' window. It has a title bar with 'Invoice designer' and a close button. Below the title bar are two tabs: 'Invoice settings' and 'Add content to invoice'. The main area is divided into two sections: 'Invoice header' and 'Invoice body'. The 'Invoice header' section contains the 'etouches' logo. The 'Invoice body' section contains a table with the following data:

Selection	Cost
	\$0.00
Net	\$0.00
Sales Tax (0%)	\$0.00
Gross	\$0.00
Paid	\$0.00
Balance	\$0.00

At the bottom of the window are two buttons: 'Save & Stay' and 'Save & Exit'.

In the Invoice Settings of the invoice designer, you can choose the page size, header and footer height.

The screenshot shows the 'Invoice designer' window with the 'Invoice settings' dialog box open. The dialog box has a title bar 'Invoice settings' and contains the following settings:

- Paper size: A4 (selected)
- Header height: 200.000 pixels
- Footer height: 200.000 pixels
- Show page numbers on the invoice: ☐ (unchecked)

At the bottom of the dialog box are two buttons: 'Save settings' and 'Cancel'. The background of the 'Invoice designer' window is dimmed, showing the same 'Invoice header' and 'Invoice body' sections as in the previous screenshot.

Using the Invoice content editor, you can select the content you want to add to the invoice. You can add the image/logo from your event logo or event database, show information about the event, add registrant's personal information or billing information, show items purchased as part of the registration along with a total cost, show the cancellation policy, terms & conditions and any other custom text that you want to show within the invoice.

