Telusys Customer Service Center

Administration Guide

A. Overview

The Telusys Customer Service Center (TCSC) provides a powerful method for Web site administrators to allow users to make purchases online. TCSC is an outlet for online registrations, products and services, membership dues and renewals and other items that the administrator supplies. Telusys sells, distributes, or provides access to these items for Web customers via the Telusys Customer Service Center [TCSC].

As an administrator, you are able to manage your own inventory of items, including events and meeting registrations, membership dues application forms, and products, services & donations forms using the TCSC Administration area. This area is accessible at the following URL:

https://secure100.telusys.net/tcsc/index.html

You will need a username and password to access the administrative functions in this area. The username and password are individually assigned by Telusys during registration as a partner of TCSC.

The TCSC Administration area currently provides access to Reports, Registration Administration, Membership Administration, Products Services & Donations Administration, Accounting, and Support. The Reports section provides reports, by date of purchase, for events and meetings registrations, membership dues and renewals, and products, services, and donation payments. The Registration Administration area is used to add, edit, and modify Event and Meeting registration options that are then used to build the registration forms that Web customers utilize. The Membership Administration area is used to add, edit, and modify Membership Dues and Renewal forms. It also houses the options that are utilized to build membership forms that Web customers can utilize. The Products, Services, and Donations area is used to add, edit, and modify Products, Services, and Donations forms. The Accounting section provides monthly reports on the sales of your items and the associated fees TCSC charges. The Support link provides a convenient form to contact Telusys at any time with your questions or comments.

B. Reports

The reports section of the administrative area provides activity reports by date range of all online items TCSC has sold. This list includes items that were purchased by check and those that were purchased via credit card. A download feature can also be activated to download an ASCII tab-delimited data file containing all matching registration records and fields. This data file can be imported into desktop software such as MS Excel or MS Access and can be used for mailings or to eliminate re-keying of purchase data.

After signing in, you will be prompted to select an individual Event or Meeting form, Membership Dues/Renewal form, or a Products, Services & Donations form, and the start date and end date for the report. After you select these options, you will either be presented with a file to save to your hard drive, or you will be presented with an onscreen table of all matching completed purchases. The table includes columns for an Order ID, Name, Title, Company, Total, and Date. The Order ID is a unique reference number that can be utilized by the administrator or the registrant to refer to a specific online registration or payment. Clicking on the Registration ID, Membership/Dues ID, or Payment ID allows you to view the complete details of an online registration.

C. Registration Administration

Registration Administration provides you with the tools for managing your own inventory of available Events and Meetings at the TCSC.

After you sign in, with your assigned username and password, you will immediately be able to edit existing Event and Meeting registration forms or create new ones.

<u>Creating a New Event or Meeting Registration Form</u>

1. Click on the <u>Registration Administration</u> link in the left-hand column.

2. Scroll down to the blank <u>Add/Edit Registration Form</u> section.

3. Enter a title for your Event in the <u>Registration or Event Title</u> field.

4. Enter an optional secondary heading to appear below the main title.

5. In the <u>Registration Text</u> field enter a full description of the event or meeting and include any instructions you would like registrants to be aware of.

6. In the <u>Add Optional Custom Questions for Requesting Registrant Information</u> section, you can add up to six custom questions to ask registrants. Each

question can require a response or not. The response text box presented to the user can be a single line or a text box allowing for a lengthier response.

7. If you have a photo or graphic you would like to include, you can upload it using the “Browse,,,” button on the form. The graphic must be in GIF or JPEG format.

8. In addition to online reports, an e-mail notification is sent out to the administrator each time someone submits a registration. You may enter up to three e-mail addresses for administrators in the E-mail Recipients fields.

9. You may indicate whether the form asks the user for a badge name.

10. You may indicate whether to ask about special accommodation needs.

11. You can select whether Visa or MasterCard payments will be allowed. Both are available by default.

12. You can also indicate whether check payments are allowed.

13. If check payments are allowed, include a mailing address and instructions where checks should be mailed.

14. Under Registration Success Text enter the message that you would like registrant to see after they have successfully registered. This can be a “Thank You” message or specific instructions as to what the registrant should expect next.

15. If something goes wrong during registration and the user is not able to register online, you can specify instructions indicating what the user can do as an alternative to registering through TCSC.

16. You can designate an Event/Meeting Registration as being online or offline. This allows you to work on a registration form and complete it before it becomes live and publicly accessible.

17. Create the Event/Meeting Registration Form by clicking on the Submit Registration Information and Options button. This will create the basic record but you will still need to enter Registration Categories and Registration Options.

18. After you have clicked on the Submit Registration Information and Options button the screen will reload and you can then scroll down to the Registration Categories section.   You must enter one or more Registration Categories that registrants can use to identify themselves. This can include categories such as Student, Associate Member, Member, Non-Member, Exhibitor, or whatever categories make sense for your Event or Meeting. You can add categories by filling in the blank text area and then clicking on the Add

Category button. You can delete categories by clicking on the corresponding checkboxes and clicking the Delete Selected Categories button.

19. The next step is to create Registration Options. **Only create your Registration Options once you have created all of your Registration Categories. Do not attempt to perform both operations at the same time**. A Registration Option tells the user what they can purchase. Fill in the blank text area to add a Registration Option. You may designate the period of time when the option will be available. This allows you to create items that are time dependent such as early registration discounts. You can also designate whether the user will be prompted for the number of individuals attending, which is useful for social events or where multiple tickets are needed. If you designate a Registration Option as being a Special Event, it will list out separately with other Special Events after the regular options are displayed to the user. After you have finished entering the Registration Option information, click on the Submit Option button.

20. Existing options will list out in a table below the area where new options can be created. You can edit an existing option by click on its name. You may also delete an existing option by selecting the corresponding checkbox next to its name and clicking on the Delete Selected Options button.

21. After you have entered your Registration Options you must enter pricing for each Registration Option and each Registration Category within that option. If an item is a free option you must enter 0 as the amount. Change or Update the pricing for each Registration Option individually and then click on the Update Pricing button. **Do not attempt to enter all of the pricing information at one time, your prices will be lost for all sections except the one corresponding to the Update Pricing button that you clicked on last**. If a Registration Option is free for all categories click on the Update Pricing button at least once after it is first created to store the 0 dollar values for each category.

Editing an Existing Event or Meeting Registration Form

1. Existing events are listed at the top of the Registration Administration page.

2. Click on the Title of an Event or Meeting, to select it, and make it your current working item. After you have clicked on the title and selected an item, all of the text boxes, Registration Categories, and Registration Options listed on the screen will be specific to the selected Event or Meeting.

3. A Registration Link section will be displayed for previously created forms. A text box is displayed with HTML code that can be used as a link. This is the link where available TCSC Events & Meetings forms may be accessed.

<u>Deleting an Existing Event or Meeting Registration Form</u>

1. Existing events are listed at the top of the Registration Administration page.

2. Click on the checkboxes next to Event and Meeting Registration Forms you wish to delete.

3. Click on the <u>Delete Selected Items</u> button to remove.

D. Membership Administration

Membership Administration provides you with the tools for managing your own inventory of available Membership Dues or Renewal forms on the TCSC.

After signing in with your assigned username and password, you will immediately be able to edit existing Membership Dues and Renewal forms or create new forms.

<u>Creating a New Membership Dues and Renewal Form</u>

1. Click on the <u>Membership Administration</u> link in the left-hand column.

2. Scroll down to the blank <u>Add/Edit a Membership or Dues Renewal Form</u> section.

3. Enter a title for your Membership Form in the <u>Membership or Dues Renewal Form Title</u> field.

4. Enter an optional secondary heading to appear below the main title, if desired.

5. In the <u>Instructional Text</u> field enter a full description of the Membership Form and include any instructions you would like registrants to be aware of.

6. If you have a photo or graphic you would like to include, you can upload it using the “Browse,,,” button on the form. The graphic must be in GIF or JPEG format.

7. In addition to online reports, an e-mail notification is sent out to the administrator each time someone submits a registration. You may enter up to three e-mail addresses for administrators in the <u>E-mail Recipients</u> fields.

8. You may indicate whether the form asks the user for home contact information.

9. You may indicate whether the user will be required to fill out the home contact information.

10. You may indicate whether the form asks the user for business contact information.

11. You may indicate whether the user will be required to fill out the business contact information.

12. You can select whether Visa or MasterCard payments will be allowed. Both are available by default.

13. You can also indicate whether check payments are allowed.

14. If check payments are allowed, include a mailing address and instructions where checks should be mailed.

15. Under Membership/Renewals – Successful Payment/Completion Text enter the message that you would like registrant to see after they have successfully registered. This can be a "Thank You" message or specific instructions as to what the registrant should expect next.

16. If something goes wrong during registration and the user is not able to register online, you can specify instructions indicating what the user can do as an alternative to registering through TCSC. This information is entered in the Membership/Renewals – Failed Payment/Completion Text field.

17. You can designate a Membership Form as being online or offline. This allows you to work on a form and complete it before it becomes live and publicly accessible.

18. Create the Membership Dues or Renewal Form by clicking on the Submit Membership Form Information and Options button. This will create the basic record but you will still need to enter Membership Categories and Membership Options as well as pricing before members can utilize the form.

19. After you have clicked on the Membership Form Information and Options button, the screen will reload and you can then scroll down to the Membership Categories section. You must then enter one or more Membership Categories that registrants can use to identify themselves. Commonly used categories include: Student, Associate Member, Member, Active, Returning Member, Senior Member, Corporate Member, but you may add whatever categories make sense for your specific dues and renewal form. You can add categories by filling in the blank text area and then clicking on the Add Category button. You can delete categories by clicking on the corresponding checkboxes and clicking the Delete Selected Categories button. The categories allow you to specify different sets of pricing for membership options based on the type of registrant filling out the form.

20. The next step is to create Membership Options. **Only create your Membership Options after you have created all of your Membership Categories. Do not attempt to perform both operations at the same time**. A Membership Option tells the user what they can purchase. Fill in the blank text area to add a Membership Option. You may designate the period of time during which the option will be available. This allows you to create items that are time dependent such as early payment discounts. You can also designate whether the option is a zero dollar option or if the user should be prompted to enter additional information. Options can be items such as "Annual Dues", "Newsletter Subscription", or "Yearly Renewal". After you have finished entering the Registration Option information click on the Submit Option button.

21. Existing options will list out in a table below the area where new options can be created. You can edit an existing option by click on its name. You may also delete existing options by selecting the corresponding checkbox next to its name and clicking on the Delete Selected Options button.

22. After you have entered your Membership Options you must enter pricing for each Membership Option and each Membership Category within that option. If an item is a free option you must enter 0 as the amount. Change or Update the pricing for each Membership Option individually and then click on the Update Pricing button. **Do not attempt to enter all of the pricing information at one time, your prices will be lost for all sections except the one corresponding to the Update Pricing button that you clicked on last**. If a Membership Option is free for all categories, click on the Update Pricing button at least once after it is first created to store the 0 dollar values for each category.

Editing an Existing Membership or Dues Renewal Form

1. Existing Membership Forms are listed at the top of the Membership Administration page.

2. Click on the Title of a Membership Form to select it and make it your current working item. After you have clicked on the title and selected a form, all of the text boxes, Membership Categories, and Membership Options listed below will be specific to the selected Membership Form.

3. A Membership Form Link section will be displayed for previously created forms. A text box is displayed with HTML code that can be used as a link to send users to for the forms available for online membership dues or renewal payments through TCSC.

Deleting an Existing Membership or Dues or Renewal Form

1. Existing Membership Forms are listed at the top of the Membership Administration page.

2. Click on the checkboxes next to Membership Forms you wish to delete.

3. Click on the Delete Selected Items button.

E. Products, Services & Donations Administration

Products, Services & Donations Administration provides you with the tools for managing your own inventory of available products, services and donations related forms on the TCSC system.

After signing in with your assigned username and password, you will immediately be able to edit existing forms or create new forms.

Creating a New Products, Services & Donation Form

1. Click on the Products, Services & Donations Administration link in the left-hand column.

2. Scroll down to the blank Add/Edit a Products, Services & Donations Form section.

3. Enter a title for your form in the Form Title field.

4. Enter an optional secondary heading to appear below the main title, if desired.

5. In the Instructional Text field enter a full description of the form and include any instructions you would like customers to be aware of.

6. If you have a photo or graphic you would like to include, you can upload it using the "Browse,,," button on the form. The graphic must be in GIF or JPEG format.

7. In addition to online reports, an e-mail notification is sent out to the administrator each time someone submits an order. You may enter up to three e-mail addresses for administrators in the E-mail Recipients fields.

8. You may indicate whether the form asks the customer for home contact information.

9. You may indicate whether the customer will be required to fill out the home contact information.

10. You may indicate whether the form asks the customer for business contact information.

11. You may indicate whether the customer will be required to fill out the business contact information.

12. You can select whether Visa or MasterCard payments will be allowed. Both are available by default.

13. You can also indicate whether check payments are allowed.

14. If check payments are allowed, include a mailing address and instructions where checks should be mailed.

15. Under Successful Payment/Completion Text enter the message that you would like the customer to see after they have successfully completed payment. This can be a "Thank You" message or specific instructions as to what the customer should expect next.

16. If something goes wrong during payment and the customer is not able to pay online, you can specify instructions indicating what the user can do as an alternative to making a purchase through TCSC. This information is entered in the Failed Payment/Completion Text field.

17. You can designate a form as being online or offline. This allows you to work on a form and complete it before it becomes live and publicly accessible.

18. Create the Products, Services & Donation Form by clicking on the Submit Form Information and Options button. This will create the basic record but you will still need to enter Buyer/Payment Categories and Products, Services & Donations – Available Items/Selections as well as pricing before customers can utilize the form.

19. After you have clicked on the Submit Form Information and Options button the screen will reload and you can then scroll down to the Buyer/Payment Categories section. You must then enter one or more Buyer/Payment Categories that customers can use to identify themselves. Commonly used categories include: Student, Associate Member, Member, Active, Returning Member, Senior Member, Corporate Member, but you may add whatever categories make sense for your specific form. You can add categories by filling in the blank text area and then clicking on the Add Category button. You can delete categories by clicking on the corresponding checkboxes and

clicking the Delete Selected Categories button. The categories allow you to specify different sets of pricing for products and services based on the type of registrant filling out the form.

20. The next step is to Add/Update Available Items/Selections. **Only create your available items or selections after you have created all of your Buyer/Payment Categories. Do not attempt to perform both operations at the same time**. The items and selections tell the user what they can purchase. Fill in the blank text areas to add an item's name and optional description. You may designate the period of time during which the item or selection will be available. This allows you to create items that are time dependent. You can also designate whether the item has a price or fee associated with the item. You may also specify whether the customer can enter their own dollar amount, which is useful for items such as donations or where there is no fixed price. There is an option to indicate whether the form should request a quantity and also whether a comments box should be included to collect additional information from the customer. After you have finished entering the item or selection information, click on the Submit Available Item/Selection button.

21. Existing items will list out in a table below the area where new options can be created. You can edit an existing item by click on its name. You may also delete existing items by selecting the corresponding checkbox next to its name and clicking on the Delete Selected Items button.

22. **After you have entered your items and selection, you must enter pricing for each item and for each Buyer/Payment Category for that item**. If an item is a free option you must enter 0 as the amount. Change or Update the pricing for each item individually and then click on the Update Pricing button. **Do not attempt to enter all of the pricing information at one time, your prices will be lost for all sections except the one corresponding to the Update Pricing button that you clicked on last**. If an item is free for all categories, click on the Update Pricing button at least once after it is first created to store the 0 dollar values for each category.

Editing an Existing Products, Services & Donations Form

1. Existing Products, Services & Donations (PSD) Forms are listed at the top of the Products, Services & Donations Administration page.

2. Click on the Title of a PSD Form to select it and make it your current working form. The displayed text boxes, Buyer/Payment Categories, and Item/Selection Options listed below will be specific to the selected PSD Form.

3. A PSD Form Link section will be displayed for previously created forms. A text box is displayed with HTML code that can be used as a link to send users to for the forms available for online Products, Services & Donation payments.

Deleting an Existing Products, Services & Donations Form

1. Existing PSD Forms are listed at the top of the Products, Services & Donations Administration page.

2. Click on the checkboxes next to PSD Forms you wish to delete.

3. Click on the Delete Selected Items button.

F. Accounting

The Accounting program provides the administrator with a report of all credit card sales made on TCSC and the associates fees. After the user signs in, they are asked to select a date range for the Accounting Report and to indicate which types of records they wish to include. The report that is generated will only include sales that TCSC handled directly, and will not include sales that were payable by check and paid directly to the supplier.

Individual orders are displayed with credits indicating money that is owed to the supplier and debits indicating fees owed to TCSC. Line items marked "TCSC Fees" include Telusys Fees as well as Credit Card Processing Fees and related transactional and ordering charges.

G. Linking to a Registration Form

Clicking on Registration Administration, Membership Administration, or Products, Services & Donations Administration and then clicking on the title of an existing form at the top of the page, brings up the form's information and options for that specific form. Additionally, a link is displayed that can be utilized on the supplier's Web site to send customer to TCSC to access the available online forms. Events and Meetings have one specific link, Membership Forms have their own separate link, and finally Products, Services & Donations Forms have their own link.

The link displayed is a suggested link that displays the words Register Online, Membership/Renewals Online, or Products, Services & Donations Forms Online. The wording can easily be changed by someone familiar with HTML, and can be replaced by a graphic button instead of a text-based hypertext link. Contact Telusys for assistance in linking your form to your Web site or for help on including the link in your e-mail messages.