Using Zoom for Virtual Event Registration

Philip Gust

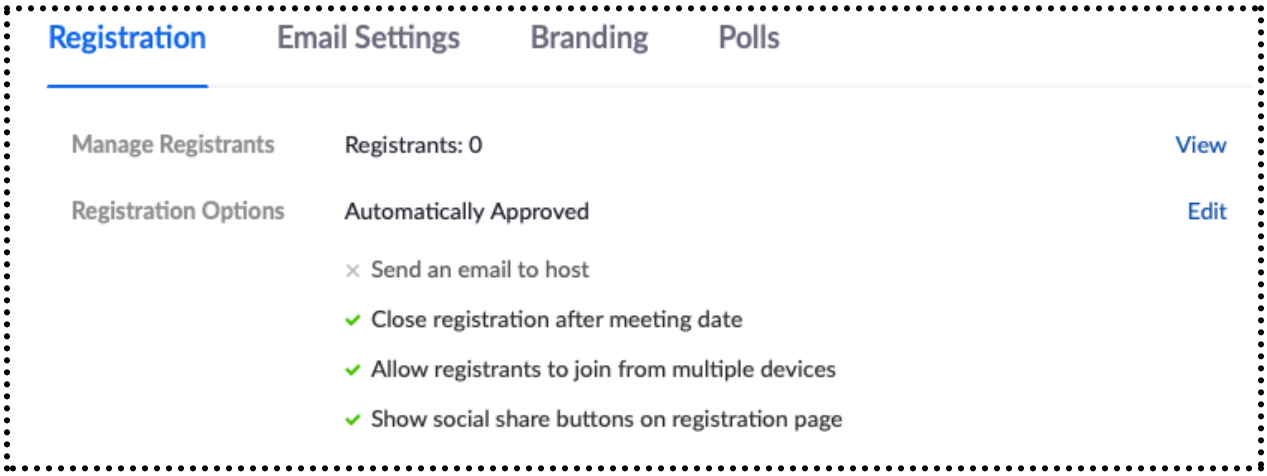
Aug 16, 2022

Zoom provides a registration capability for meetings that SiW can use for its virtual special events. There are two reasons to ask attendees to register for a special event. One is to ensure that we do not exceed our 100 seat limit. Once the maximum number of attendees have registered, registration is closed. This allows us to have tiered registration, offering seats first to members, then to other ICG members, and finally to outside attendees. The other is to capture attendee information so we can analyze attendee location, organizational affiliation, reason for attending, and interest in learning about future events.

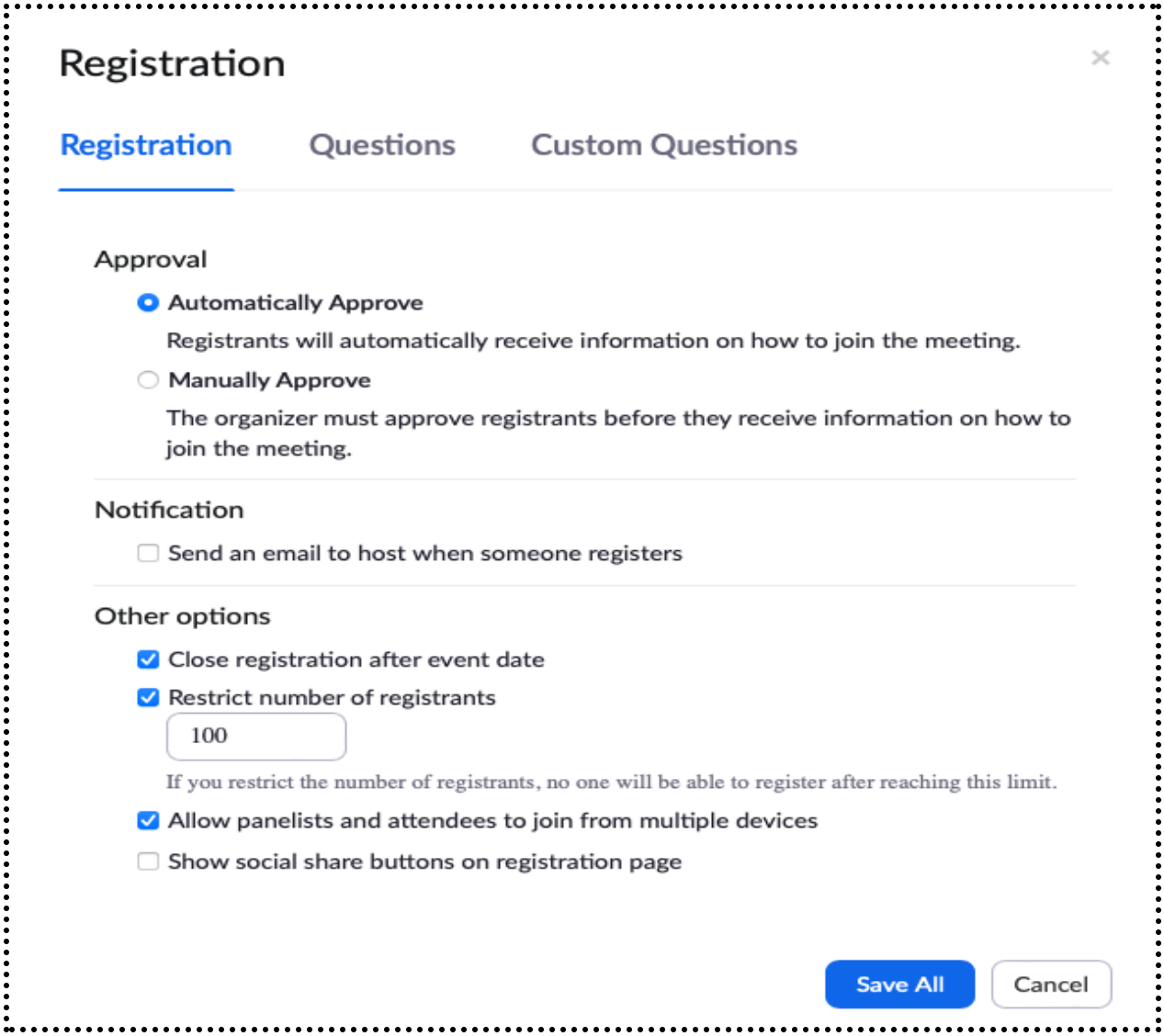
This document describes the capabilities of the Zoom registration system by showing how to set up the registration for a test virtual event. Zoom provides an introduction to scheduling a meeting with registration that was very helpful in understanding the available capabilities. (https://support.zoom.us/hc/en-us/articles/211579443-Scheduling-a-meeting-with-registration).

Creating the event with registration

The first stop is to set up a sample Zoom meeting and select the **Registration Required** check box. I chose to allow attendees to join any time and not to use the waiting room feature to simplify meeting management. Once the meeting is created, a set of tabs appears below the meeting configuration for managing registration options.

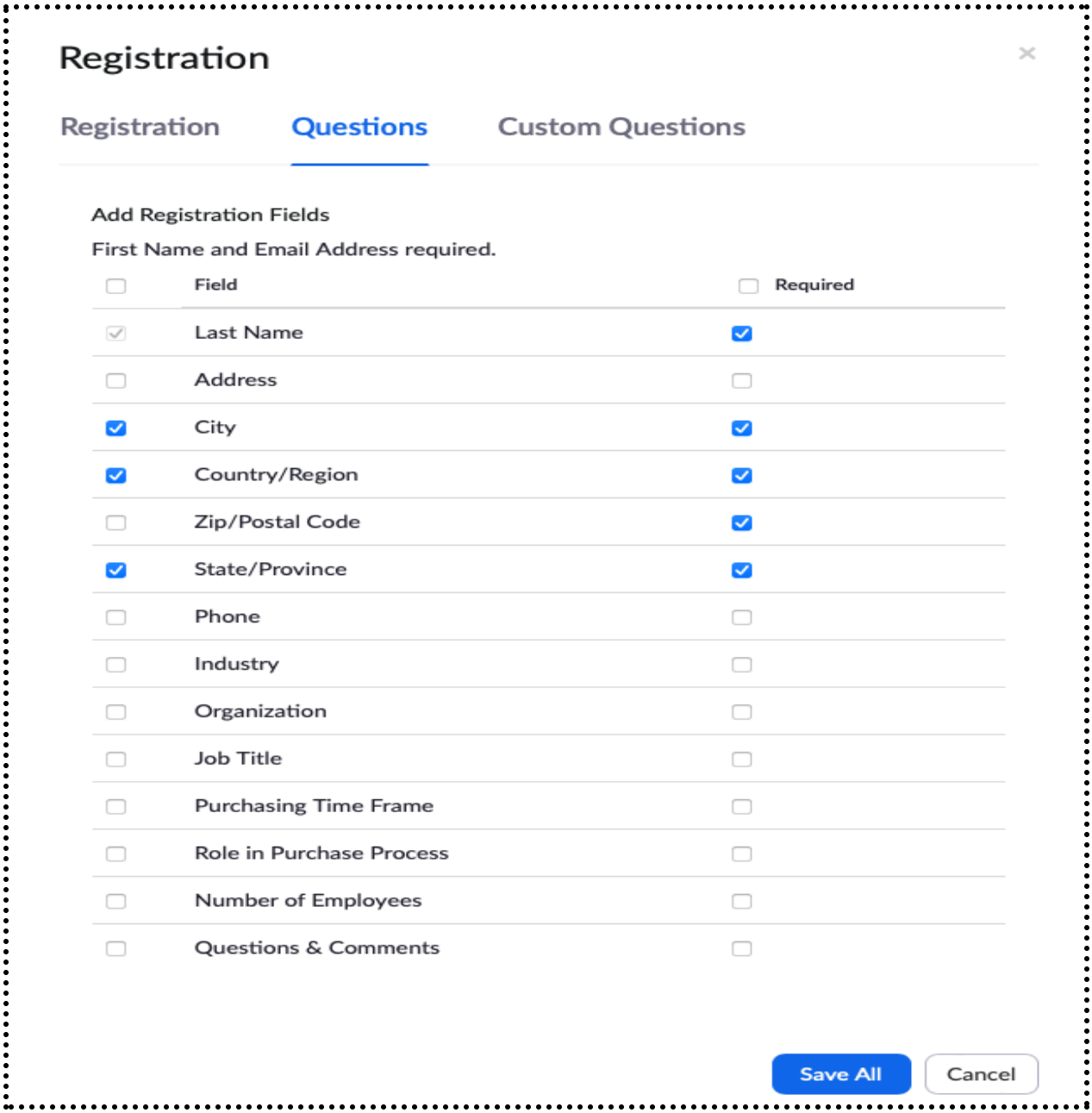


The **Registration** tab provides registration options and a way to manage registrants. Selecting **Edit** brings up a registration options dialog. The dialog has three tabs. The **Registration** tab in this dialog provides options for registration approval, whether email is sent to the host when someone registers, and other options. Here is a screenshot showing the one that I selected.



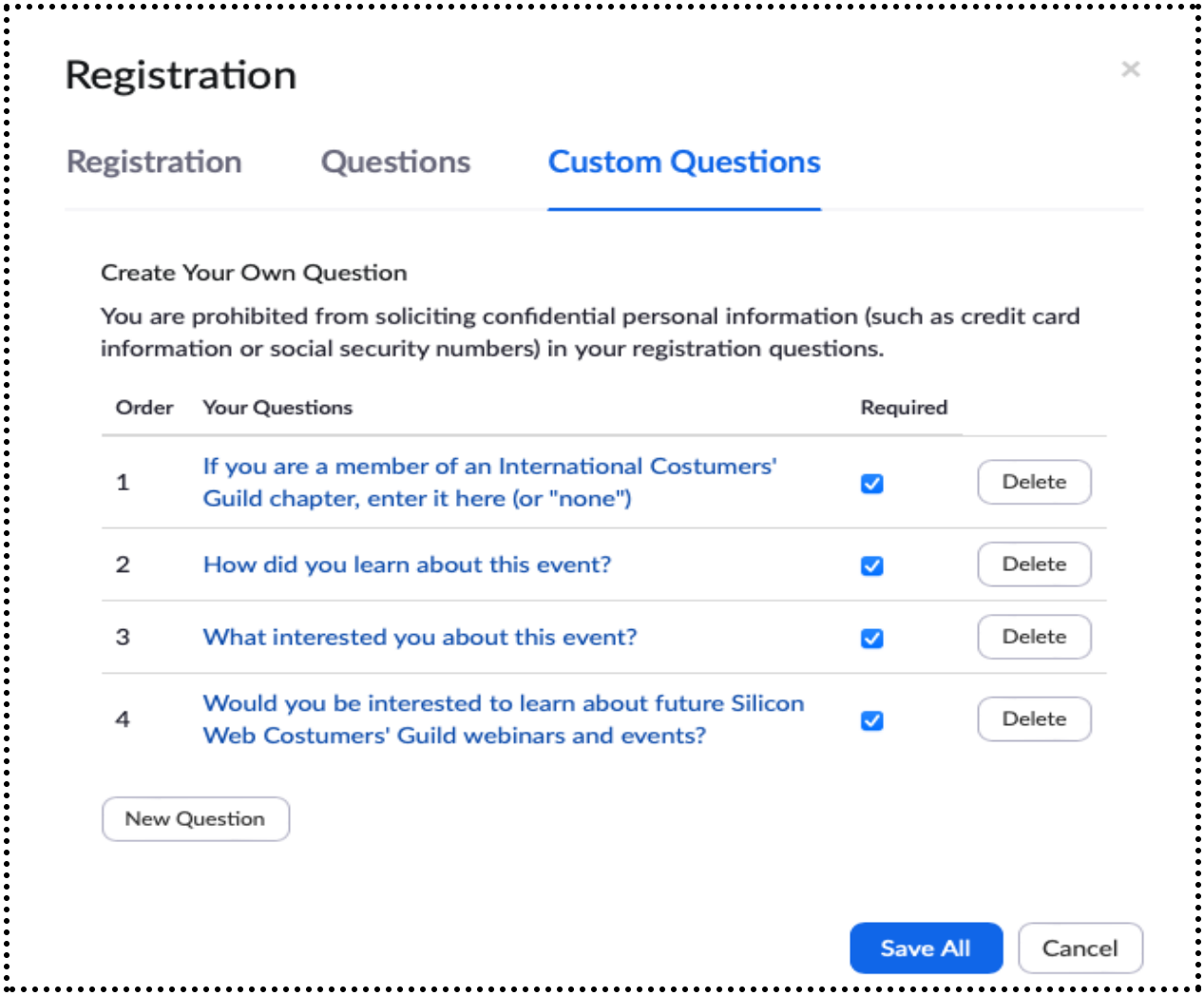
I chose to automatically approve registrants because there was no need to manually approve registration requests in this case. I did not choose to notify the meeting host when someone registers because the email goes to all ICG Zoom administrators. It would have been good if there was a way to specify an email address to notify. I chose not to show social share buttons on the page people see to register because we will use a tiered registration with SiW members first, then ICG members, then others. People will likely post the invitation link even without this feature but at least this will not encourage it.

Registration options also include the ability to provide a set of questions for registrants to answer during registration. I chose to ask users for a little information that we can use to analyze registration to understand attendee demographics, and interest in learning about future events. Zoom provides a set of standard questions to select, along with the ability to provide custom questions. Here is a screenshot of the standard questions showing the demographic information that I selected.



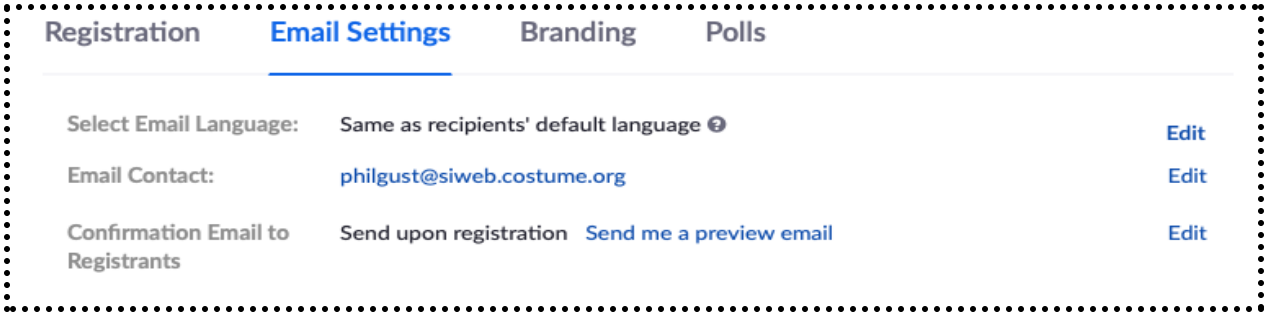
I did not select zip code; city, state, and country is adequate for any kind of demographic analysis we might do.

I created four custom questions. The first was a short-answer question about ICG chapter membership to determine which chapter registrants belong to. The second was a single choice question about how the registrant learned about the event: direct email, found it on the web, through social media, by word of mouth, or other. The third was to understand what interested the registrant about the event. The fourth was a yes/no question to gauge interest in future webinars and events. I chose to make all the questions required for this test to see if it is asking too much.

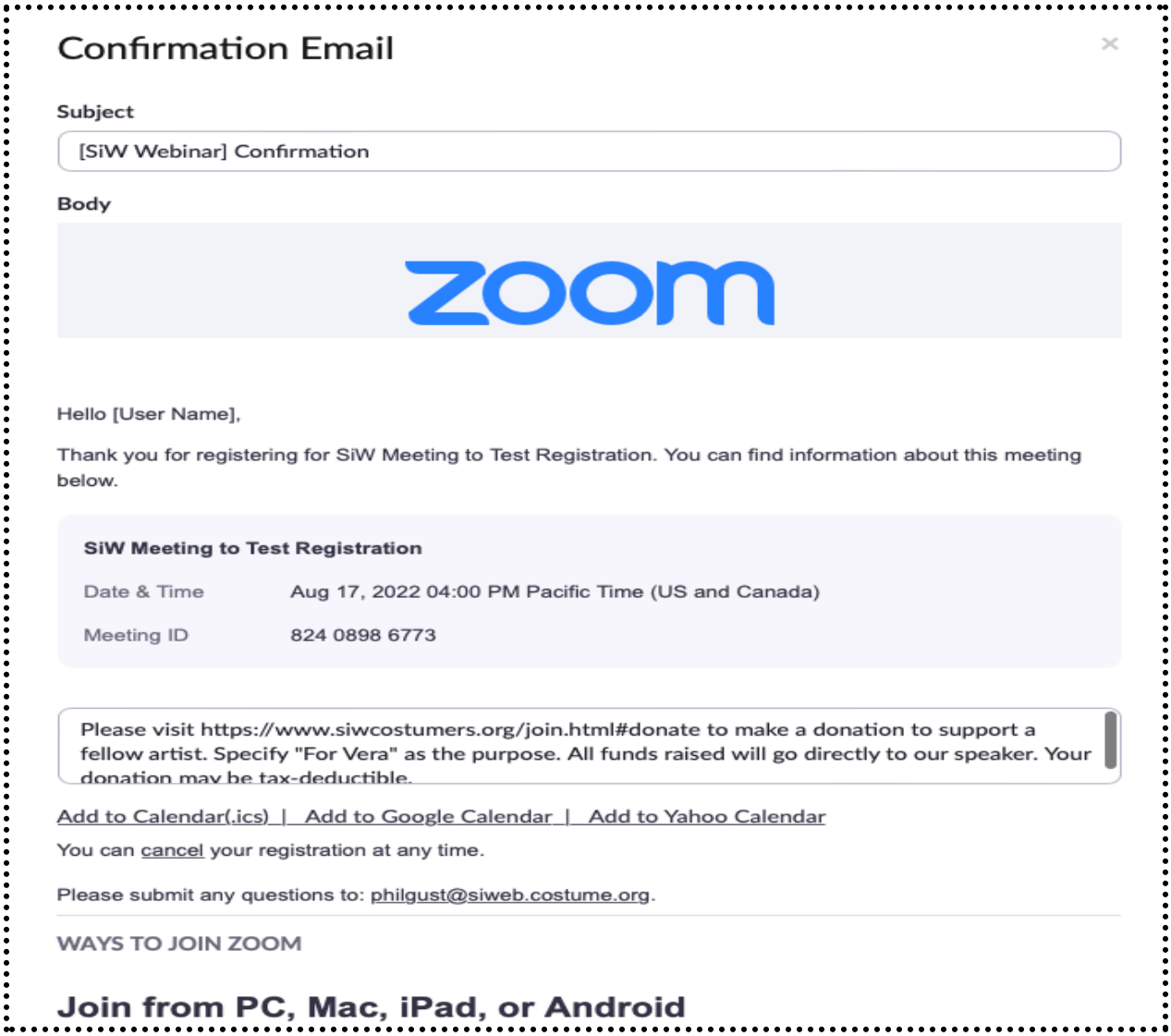


After completing this dialog, I selected **Save All** to save my work.

The second tab on the main meeting page provides options to configure email settings for the confirmation email sent to registrants. The **Email Contact** option only allows specifying an email address to include in the registration email for questions. It has no effect on where preview email messages are sent; they still go to the Zoom account email, which goes to all ICG Zoom administrators.

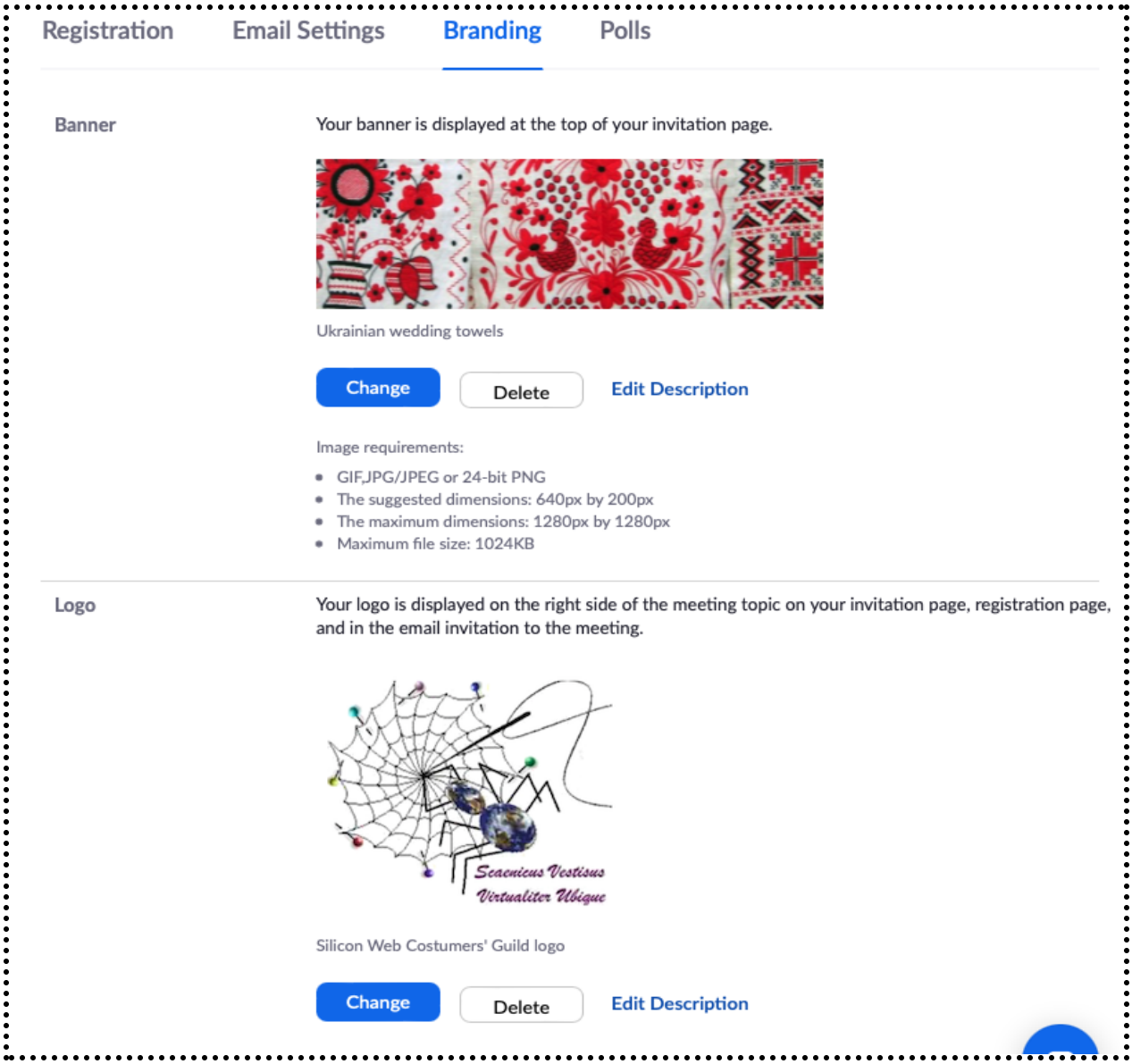


The third setting provides the option to send confirmation email messages to registrants and to customize it. The dialog looks like the email message, and includes a customizable subject line and a text area for additional information about the event. For this test, I used it to remind registrants that they can make a donation to the speaker using the supplied link.



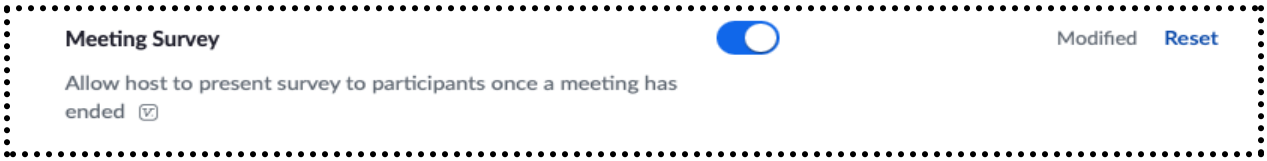
After saving this dialog, I made the mistake of sending a preview email. That is when I learned that it does not go to the email address I entered for questions about this event, but to the ICG Zoom administrators list. A better way to test the message is to actually register for the event.

The **Branding** tab on the meeting page allows banner and logo images to be uploaded. The banner is displayed at the top of the invitation page and the logo is displayed on the right side of the meeting topic area. I cropped a banner image for the Ukrainian Wedding Towel talk and used the chapter logo I had at hand that fit in the recommended square format. It would be better if the logo is transparent, since it appears on a gray background on the email.

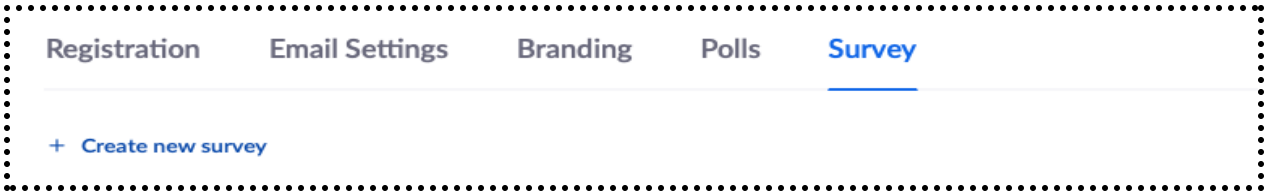


The final tab on the meeting screen is for creating polls. Multiple polls can be created that the speaker can launch during a meeting. Polls can include single- or multi-choice questions that ask for participants' opinions about meeting topics. I decided not to use them for this test.

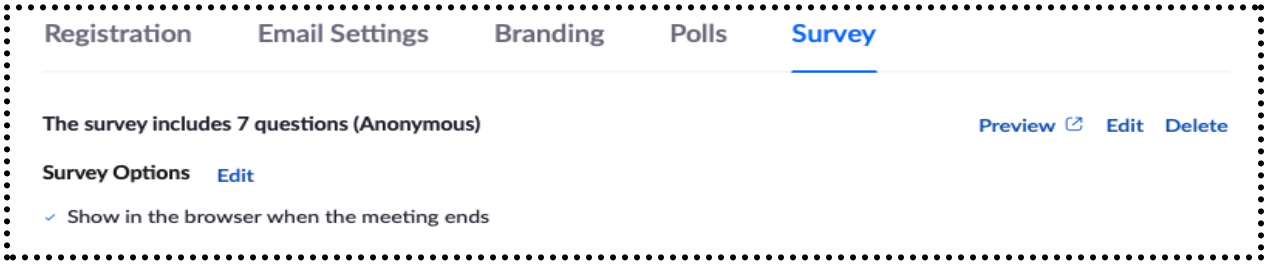
Another capability is an after-meeting survey. The feature is off for a Zoom account by default. I enabled it by going into the account Settings and turning on **Meeting Survey**.



After enabling this feature, a new **Survey** tab showed up on the meeting page.



I created a survey to gather attendee feedback about the meeting to analyze.



The survey allows single-choice, multichoice, rating scale, and long-answer questions. My survey has six rating scale questions using a 5-level Likert scale that will allow for qualitative analysis of participant feedback.There is also a long-answer question for free-form feedback that could also be classified for analysis.

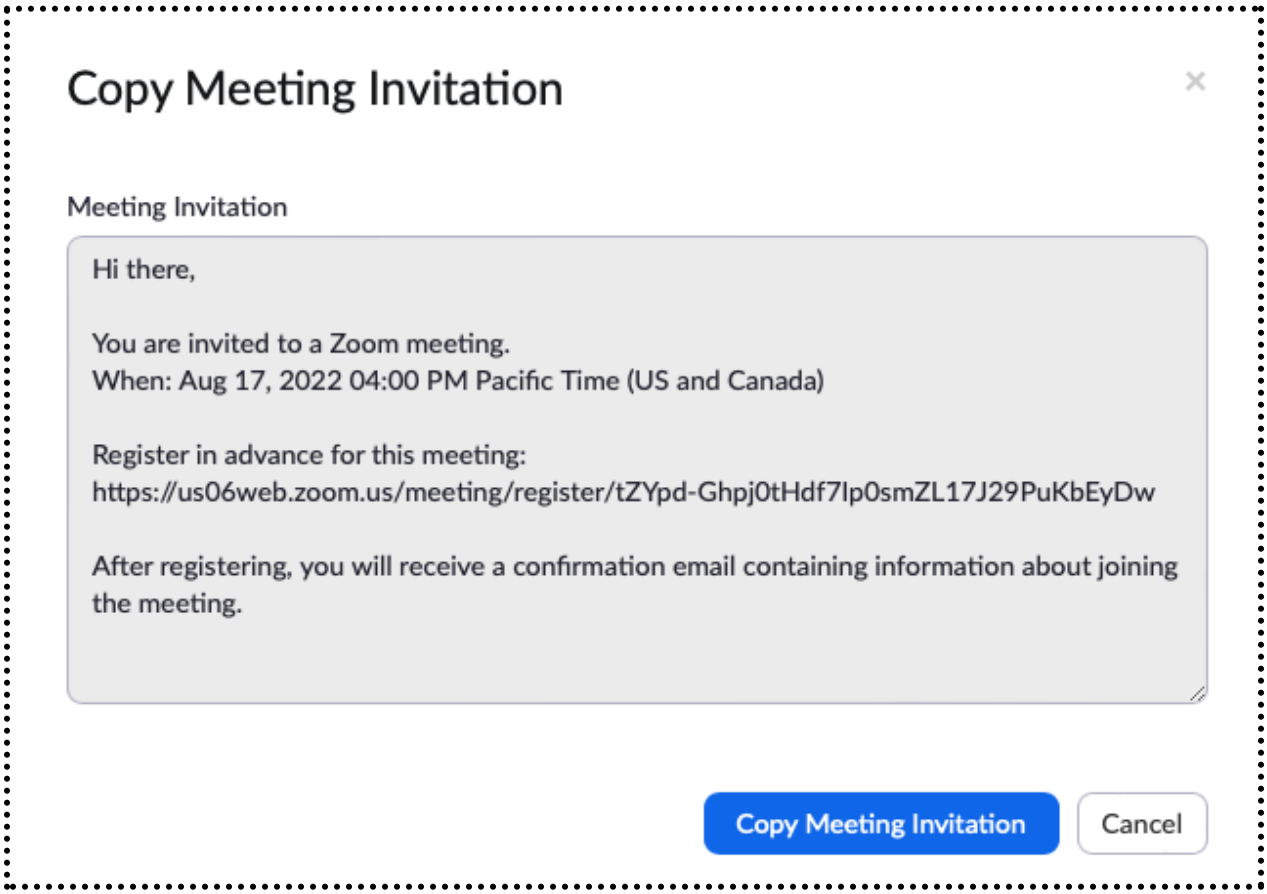
1. How well did this event meet your expectations?
   (0: very poorly to 4: very well)
2. How was the level of the information presented?
   (0: too shallow to 4: too deep)
3. How satisfied were you with the presentation materials?
   (0: very dissatisfied to 4: very satisfied)
4. How satisfied were you with the speaker?
   (0: very dissatisfied to 4: very satisfied)
5. How satisfied were you with the meeting technology?
   (0: very dissatisfied to 4: very satisfied)
6. How likely are you to attend another SiW webinar?
   (0: very unlikely to 4: very likely)
7. What other feedback would you like to provide?
   (optional text response)

There is an option for responses to be anonymous. This is the default and I chose not to change it. It would be worth changing if we wanted to analyze responses separately for SiW or ICG members.

Once the survey is saved, there is an option to preview what participants will see in a new browser window. The other survey option to show in a browser when the meeting ends is selected by default.

Publishing the event invitation

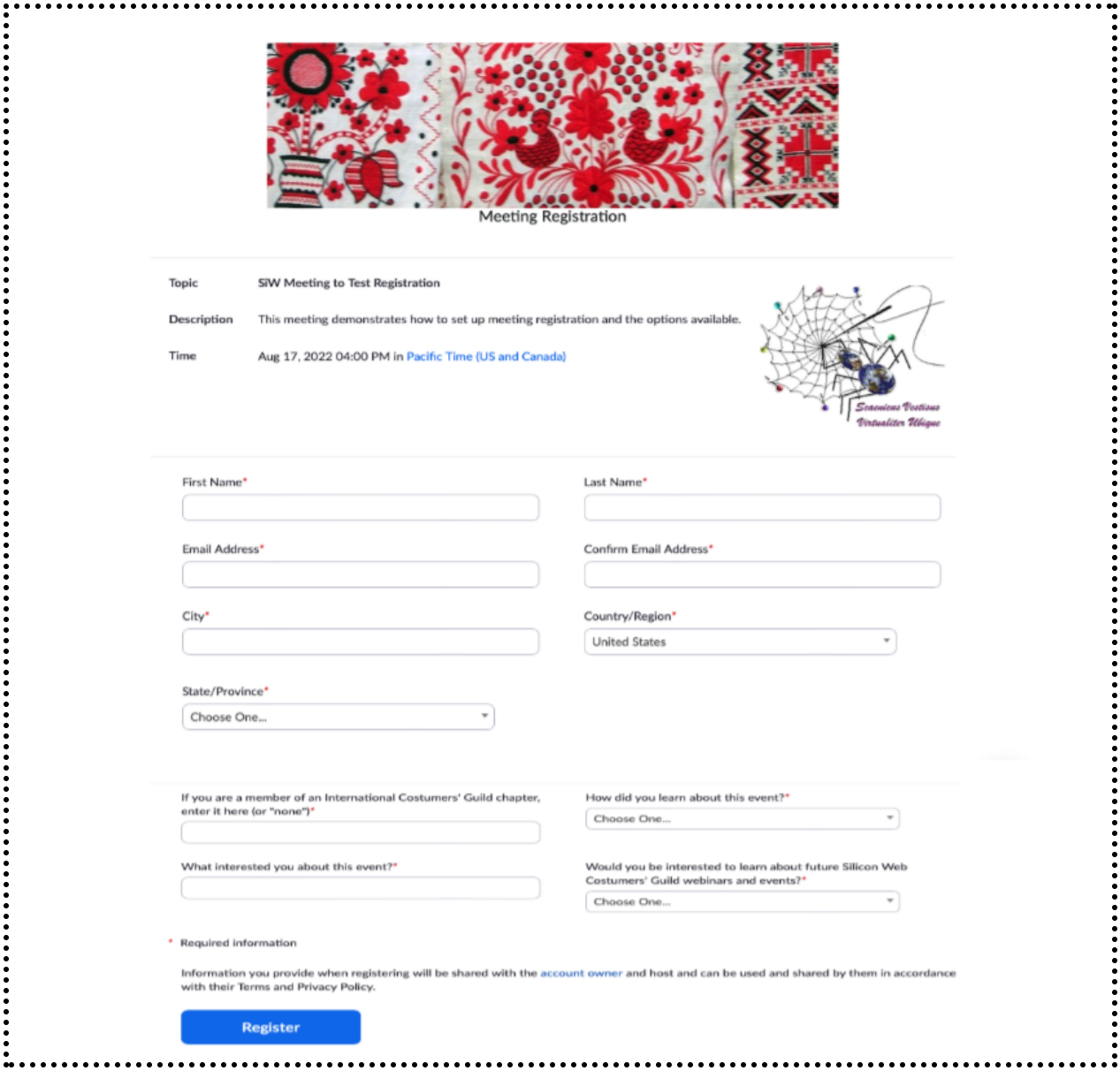
Rather than publishing a link to the Zoom session, we publish a registration invitation link that enables a person to register for the event. The registration link appears on the meeting page. The page also provides a **Copy Invitation** button below the link. Selecting it brings up a dialog with simple text that includes the date and time of the meeting, the registration link, and an explanation that a confirmation will be sent once registration is complete.



Selecting **Copy Meeting Invitation** copies the text to the clipboard. This text could be used directly in an email message or modified slightly to include the name of the event and any other information. For most SiW webinars, the invitation link will typically be included in a promotional announcement sent to target audiences in a tiered registration roll-out.

Registering for the event

Here is the registration form that is presented by following the invitation link to register for the event.



Meeting Registration

Topic SIW Meeting to Test Registration

Description This meeting demonstrates how to set up meeting registration and the options available.

Time Aug 17, 2022 04:00 PM in Pacific Time (US and Canada)

First Name*

Last Name*

Email Address*

Confirm Email Address*

City*

Country/Region*

United States

State/Province*

Choose One...

If you are a member of an International Costumers' Guild chapter, enter it here (or "none")*

How did you learn about this event?*

Choose One...

What interested you about this event?*

Would you be interested to learn about future Silicon Web Costumers' Guild webinars and events?*

Choose One...

* Required information

Information you provide when registering will be shared with the account owner and host and can be used and shared by them in accordance with their Terms and Privacy Policy.

Register

Once the registration form is completed and submitted, the following confirmation screen is shown:

Meeting Registration Approved

Topic	SiW Meeting to Test Registration
Description	This meeting demonstrates how to set up meeting registration and the options available.
Time	Aug 17, 2022 04:00 PM in Pacific Time (US and Canada) Add to calendar
Meeting ID:	824 0898 6773

To Join the Meeting

Join from a PC, Mac, iPad, iPhone or Android device:

Please click this URL to join. https://us06web.zoom.us/w/82408986773?tk=C26oMR1Ftts9brwSMhLeLQt70JZuZXCvcNsGv7uWZdo.DQMAAAATL_VYlRZlaXg0N1dYTlFkYTVIblc5TzFSLVNRAAAAAAAAAAAAAAAAAAAAAAAAAAAAAA&pwd=UTNTR0E5VjhmMDh1TXBRREdnK2NWQT09

To Cancel This Registration

You can cancel your registration at any time.

The screen includes the name of the event, the time and date, a link to the event, and a link at the bottom for canceling the registration. The email message is similar to the confirmation email screen shown earlier with graphics and attendee information filled in.

Hello Philip Gust,

Thank you for registering for SiW Meeting to Test Registration. You can find information about this meeting below.

SiW Meeting to Test Registration

Date & Time	Aug 17, 2022 04:00 PM Pacific Time (US and Canada)
Meeting ID	824 0898 6773
Passcode	337953

Please visit https://www.siwcostumers.org/join.html#donate to make a donation to support a fellow artist. Specify "For Vera" as the purpose. All funds raised will go directly to our speaker. Your donation may be tax-deductible.

Add to Calendar(.ics) | Add to Google Calendar | Add to Yahoo Calendar

You can cancel your registration at any time.

Please submit any questions to: philgust@siweb.costume.org.

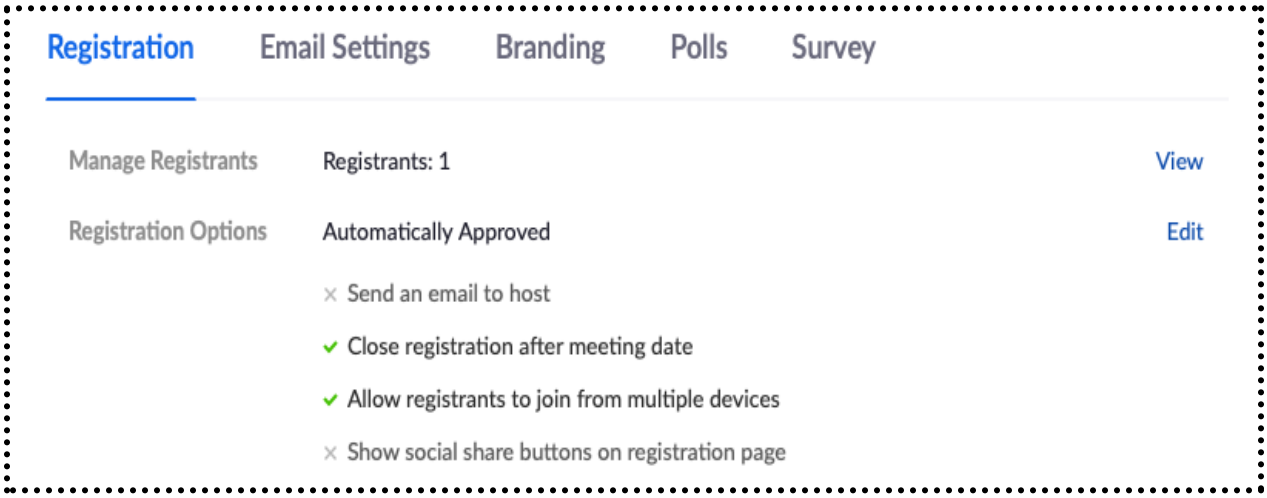
WAYS TO JOIN ZOOM

Join from PC, Mac, iPad, or Android

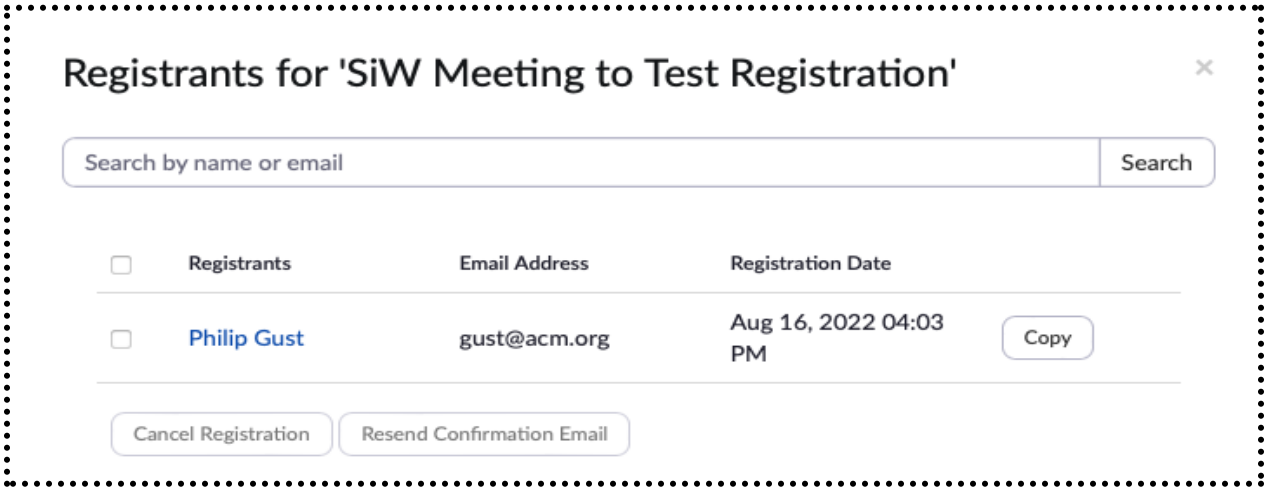
Join Meeting

Managing event registration information

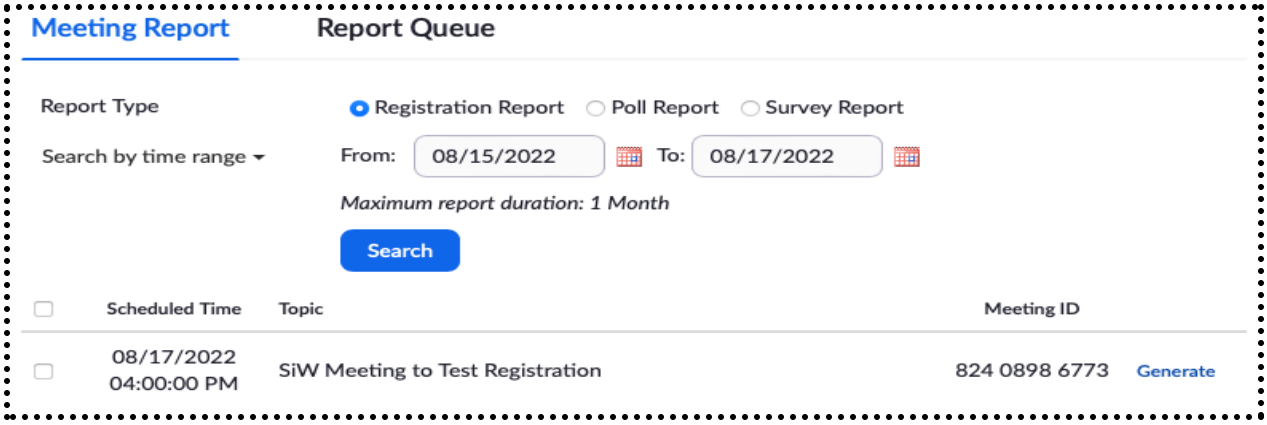
Now that a participant is registered, the Registration tab on the meeting screen shows it and allows registrants to be managed.



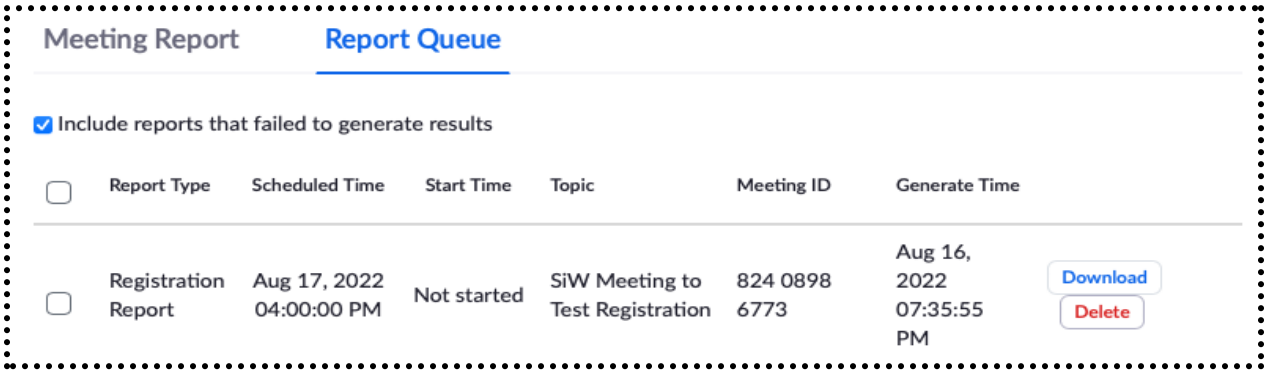
Selecting **View** brings up the the Registrants management screen:



The report on registrants with full registration information can be accessed from the Zoom navigation menu under **Account Management** > **Reports** > **Meeting** and searching by **Registration Report** with a date range. The maximum report duration is 1 month. Select **Generate** for the meeting and choose the **All Registrants** option..

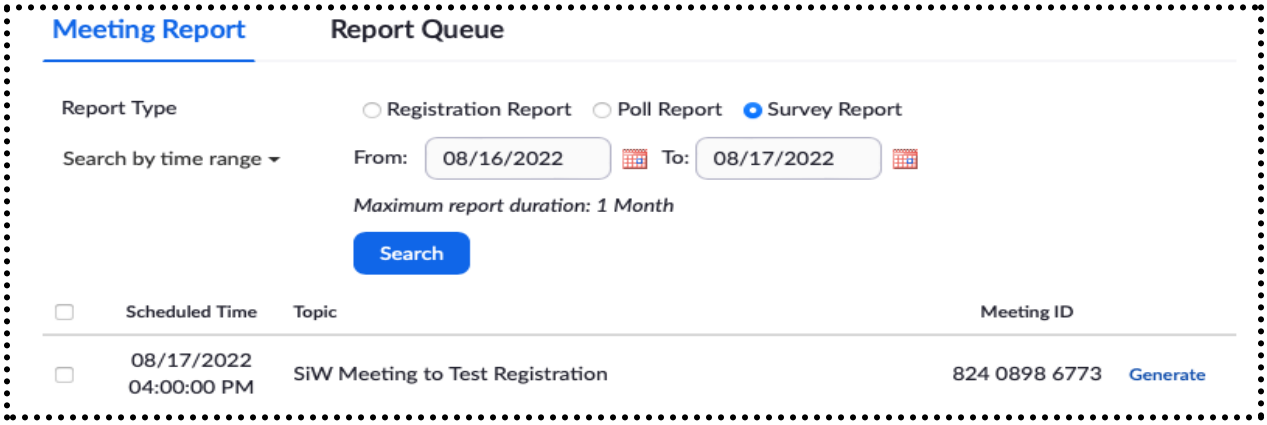


After some period while the report is generated, a **Download** button will appear that enables downloading a CSV file with full registration information for each registrant.



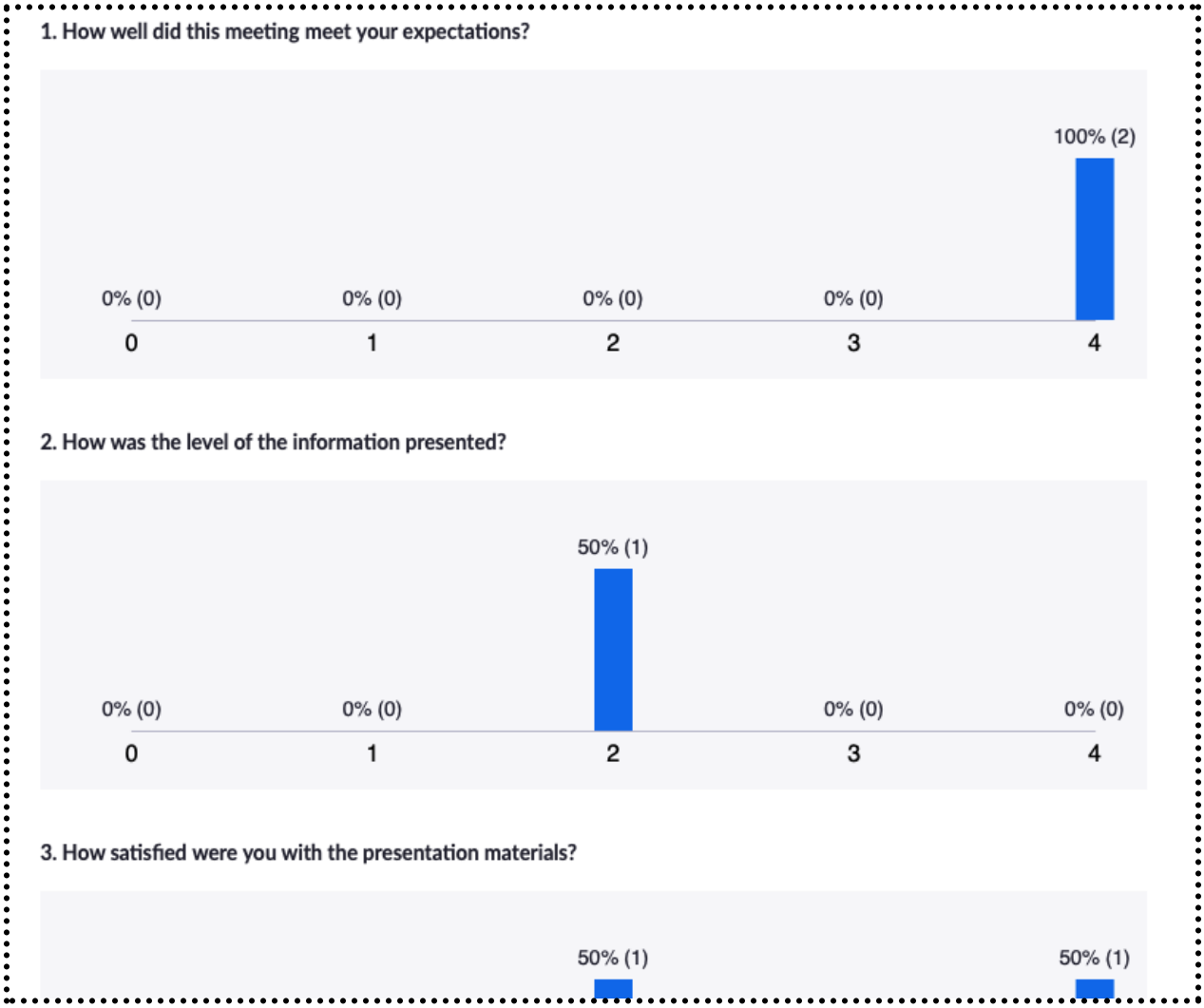
Accessing event survey information

Once the meeting has completed, accessing post-meeting survey information follows the same procedure as for registration information. On the same **Meeting** screen shown earlier, select **Survey Report** and search for the meeting by date. Then, select **Generate** to generate a CSV file with the survey results. Once the report is ready, select **Download** to download the CSV file.



The survey information can also be accessed from the **Survey** tab at the bottom of the meeting page.

Selecting **View Responses** summarizes the results graphically, and also provides a way to download the CSV report.

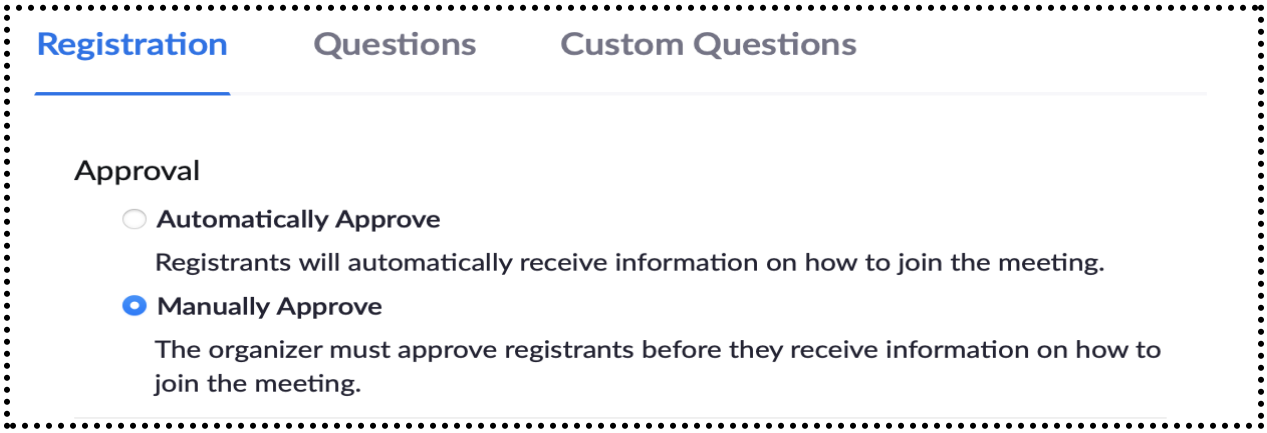


Monetizing the event with Zoom registration

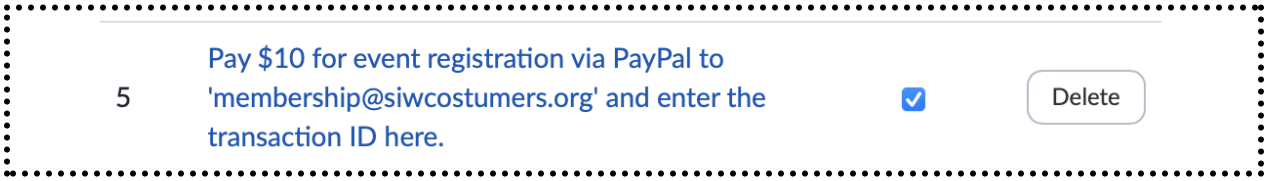
The Zoom registration system does not directly support monetizing meetings. There are several third-party paid event registration services that offer payment options. If we begin charging non-members for certain events, we might consider using one of these services. It is possible to monetize Zoom webinars using its registration system with PayPal. However the Zoom webinar addin is expensive (~$600/year) so we would only consider this if we needed other capabilities that could justify the additional cost.

This section describes an ad-hoc way to monetize meetings using the existing Zoom meeting registration system with PayPal. Although it requires a little manual processing, it may be adequate for the frequency of events and the number of attendees.

It uses the registration **Manually Approval** option for meeting registration, rather than automatically approving a registration



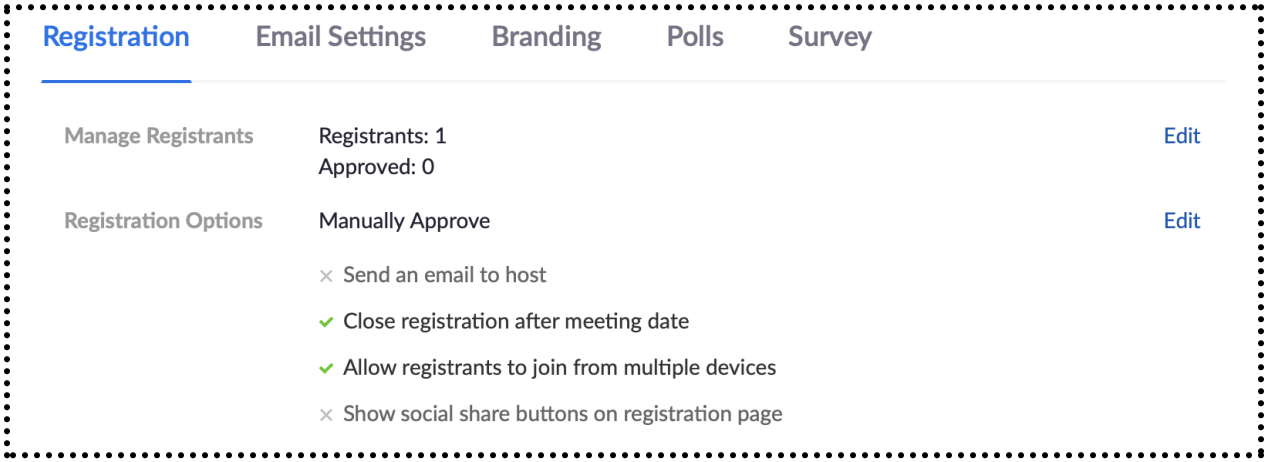
The event organizer can approve a registrant once the PayPal payment is received. This could be implemented by adding a custom registration short-answer question that directs the registrant to pay through PayPal and enter the transaction id. Note that it is not permissible to collect financial information through Zoom, but a transaction ID should be permissible.



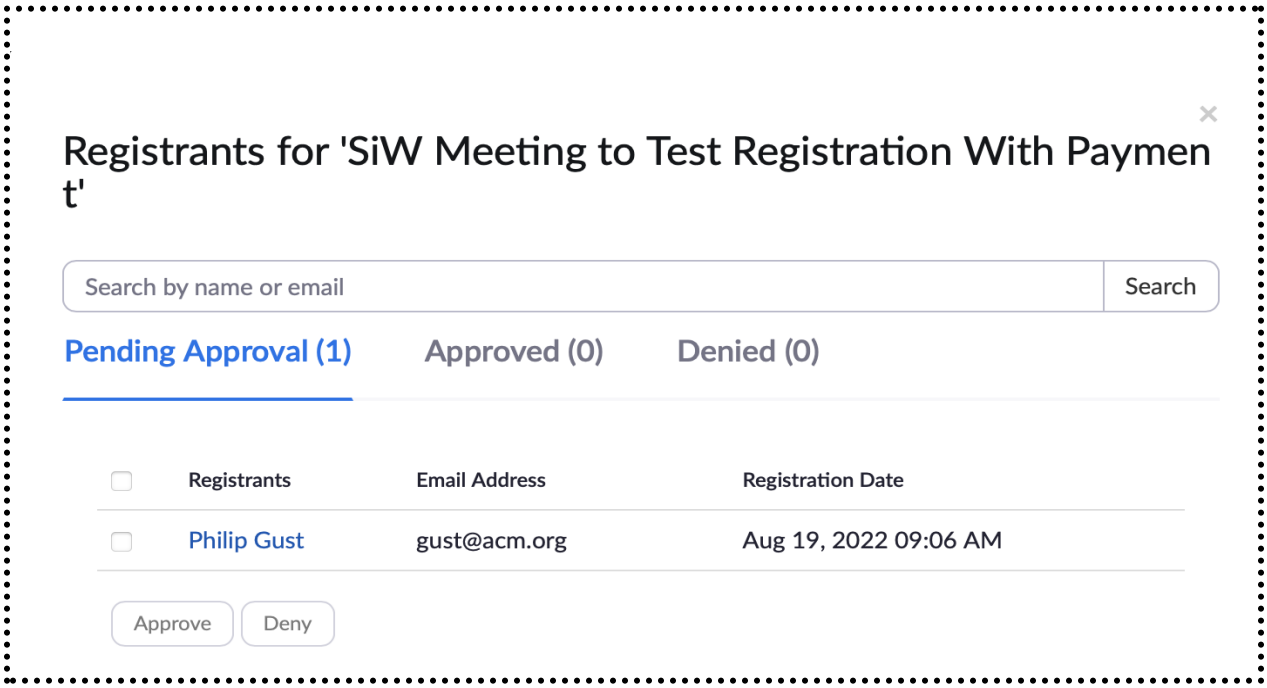
There should be no reason to ask for the transaction date because it is very likely to be the same as the registration date. The meeting organizer can always contact the registrant if there is a problem with the PayPal payment.

Once a registrant completes the form, the following screen is displayed, indicating that the registration request for this meeting has been submitted for approval, and that the registrant will receive an email about registration status.

The **Registration** screen on the meeting page shows the number of total and approved registrants.



Selecting **Edit** brings up the **Registrants** screen, showing a registration pending approval.



Selecting a name brings up a dialog with the registration information including the PayPal transaction ID, which can be verified through the chapter PayPay account.

Registrant Details

Back

Philip Gust	
Status:	approval
Registered:	Aug 19, 2022 09:06 AM
Email:	gust@acm.org
First Name:	Philip
Last Name:	Gust
Email Address:	gust@acm.org
City:	Redwood City
Country/Region:	US
State/Province:	CA
If you are a member of an International Costumers' Guild chapter, enter it here (or "none"):	Silicon Web
How did you learn about this event?:	direct email
What interested you about this event?:	Interested in the topic being presented
Would you be interested to learn about future Silicon Web Costumers' Guild webinars and events?:	Yes
Send $10 for event registration via PayPal to 'membership@siwcostumers.org' and enter the transaction ID here:	0F1395674U081850X

Approve Deny

Once the payment is verified, the registration can be approved and will receive a confirmation email with the event link. If there is a question, the event organizer can contact the registrant by email. If there is a problem, the registration can be denied and the registrant will receive an email with an explanation. This method relies on the registrant knowing how to login to PayPal and make a payment to ‘membership@siwcostumers.org’ with a note about its purpose.

A variation is to have a special payment page for the event on the SiW website that submits the payment to PayPal with the event information and amount filled in, and include a link to that page in the registration question. The link could be either per-event or for the event type if the amount for that type of event type is standard.

5	Pay at https://siwcostumers.org/evtpmt/220928.html and enter the PayPal transaction ID here.	☑	Delete

If there is no charge for SiW members, a special transaction ID can be provided when the event is announced to members that they can enter for this question and that the event organizer can immediately approve.

This method of accepting payments requires the event organizer to check for pending registrations regularly, but it can be implemented entirely within the Zoom registration system and should be manageable for the number of attendees allowed for our Zoom account.