

Dear Checklist User,

We have spent thousands of hours designing and building an online registration system and working with event planners to set up and maintain online registrations forms.

From this experience, we have built a checklist that we use in our own day to day business and that we hope you will find useful too. Reviewing forms is a detailed process and this checklist helps ensure that all of the details, both big and small, are taken care of. Please feel free to forward this list to your colleagues or others that you think will find it useful.

**If you will be using online registration for an event, we would be thrilled to prepare a free no obligation quote for you.**

When you are researching different systems, you will find that many of the features are very similar. Here are a few things that we feel make ePly different.

- We create registration forms that look like your website, not just your logo on a template. Brand and image take a long time to develop and require ongoing effort to maintain. That's why we build a form that mimics the look and feel of your website or other promotional material.
- Event planning requires attention to detail and with this in mind, we've built flexibility into our system. When we're designing forms, we can accommodate the small details that you want taken care of.
- No instructions required! Our aim is to sort through the complexity and to build the most logical and fool-proof form. Because we have seen so many registration forms, we know what works and what to watch out for.
- Technophobes welcome. A one page registration form eliminates the confusion of going from screen to screen. Simple scrolling up and down makes it easy to see where you have been on the form and what you still need to do. Reviewing and changing responses becomes just like a familiar paper form.

#### Demo

1. Try an online registration [demo](#).

#### Free Quote

2. Request a [quote](#) for your event.

#### Newsletter

3. Join ePly's monthly [newsletter](#).

Contact us for more information.

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Do You Check These 65 Details When Reviewing Your Online Forms?

## Form Design

Your form should be so attractive, professional looking and inviting that people don't hesitate before entering their registration details.

What to check	Tips and Comments
1. Images are correct.	Make sure you have the right version of logos and that any required sponsor logos are included.
2. Image quality is good.	Images are crisp, colours are correct and text is legible.
3. Image dimensions are good.	Large images take up valuable screen space and can distract the user from completing the form.
4. Positioning of images on the form is good.	Make sure the form looks balanced and well designed.
5. Image file size is not too large.	Smaller file size is better so that forms load quickly (of most concern if you will have users on dial-up connection).
6. Overall form appearance is good.	The form should not appear cluttered and should look welcoming and easy to use.
7. Page background colour matches website or other promotional material.	A consistent look and feel helps participants feel comfortable with the process.
8. Form background colour is suitable.	White is usually best as the form background, but if colour is used it should provide high contrast with text/images for maximum legibility.

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9. Header does not take up too much space.	The header should be as compact as possible so the user does not have to scroll to see the start of the registration details.
10. Form width fits within screen.	Scrolling sideways should not be required. Designing to fit an 800x600 screen is best.
11. Text is short and concise.	Since people tend to only skim through text (if you are lucky), it should be well spaced for good legibility and be limited to critical details. Provide other details in the confirmation email or on your website.

## Formatting

Some basic formatting guidelines will give you a professional looking and easy to use form.

What to check	Tips and Comments
12. Font type is easy to read.	Should not use complicated, decorative or cursive fonts that reduce legibility and frustrate users.
13. Font size is good.	Small fonts offer poor legibility while excessively large fonts lack a professional appearance and take up too much space.
14. Font use is consistent throughout form.	Mixing too many font types on a form will look cluttered. Stick to one or two and use them in a consistent way.
15. Font colour is good.	High contrast with the background provides maximum legibility.
16. Bolding or other formatting is used conservatively.	Excessive formatting limits effect and legibility.
17. Spacing between lines of text is consistent.	

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18. Space between form elements provides good legibility.	Separating out elements with space creates clear transitions from one element to the next so that nothing is overlooked.
19. Alignment is good.	Aligning form elements helps create an easy to read form.
20. Spelling is correct.	Check that words with variable spelling are correct for your country. i.e. check/cheque.
21. Punctuation is correct.	
22. Abbreviations are used consistently.	
23. Dates are written out (May 5, 2006).	Creates less confusion than a number format. i.e. 09/05/06 or 05/09/06
24. Dollar amounts are formatted consistently.	i.e. \$400.00 or \$400
25. Links are set up without using "Click Here".	i.e. "View the <a href="#">conference schedule</a> " not " <a href="#">Click here</a> to view the conference schedule."  See the article "Create Better Links to Get More Event Registrations" at <a href="http://www.eply.com">www.eply.com</a> under resources.
26. Email addresses are written out.	Allows the user to cut and paste the address if required. i.e. <a href="mailto:info@eply.com">info@eply.com</a> rather than <a href="#">Email</a> .
27. Email addresses appear as links.	Allows the user to start an email with a click.
28. Text boxes are sized appropriately.	Size should be appropriate for the required responses.
29. Text box size is consistent.	Limit the number of variations in text box size for a neat and organized look.
30. Text fits within drop-down menus.	

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31. Text wraps at good points within sentences.	Text that wraps can make your form look disorganized. If an automatic wrap doesn't look right, force a wrap in a better spot.
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**Event Details**

This is where you get down to the critical details that are important to the success of your event.

What to check	Tips and Comments
32. Event name is listed and correct.	This is especially important if you have multiple registration options at any one time so that registrants are confident that they have arrived at the correct form.
33. Event date is listed and correct.	
34. Event time is listed and correct.	If your event spans over multiple days, including all of the times on the form could appear cluttered. The confirmation email is a good place to include more detailed information.
35. Event location is listed and correct.	Including a link to a map or directions can be helpful.
36. Details for a contact person are listed and correct.	Make it easy for registrants to contact somebody if they have questions. A toll-free number is helpful if people from outside your local area will be registering.
37. Date and time for registration to close are correct.	<p>Establishing a close date can create a sense of urgency to register so that people do not wait until the last minute.</p> <p>See the article "What to Know Before Closing Event Registration" at <a href="http://www.ePLY.com">www.ePLY.com</a> under resources.</p>

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38. Correct registrant contact details are being collected.	
39. Field types (drop-down menu, radio button, check box, etc.) are appropriate for each question.	For example, if someone may want to purchase more than one ticket to a dinner, be sure the field is a drop down list or a radio selection. If it is a check box they won't be able to indicate a quantity.
40. Selections in province/state drop-down menu are correct.	List provinces and/or states depending on where you expect participants to come from.
41. Selections in country drop-down menu are correct.	List all countries where you expect participants to come from.
42. Default selection in province/state drop-down menu is correct.	A default selection can be set if most registrants will be coming from one area.
43. Default selection in country drop-down menu is correct.	A default selection can be set if most registrants will be coming from one country.
44. Full address, including country are required fields if credit card payment is offered.	Gateway companies require and verify address to authorize credit card payment.
45. Registration options are correct.	Keep in mind that different pricing can be built into one registration selection (i.e. member, student) so the layout may vary from your paper form.
46. Ticket purchase options are correct.	Banquets, meals, activities, raffle tickets, etc..
47. If applicable, details being collected for guests of the main registrant are correct.	
48. Selections in drop-down menus are correct.	Make sure that the selections are clearly distinct from one another as only one selection can be made.
49. Default selections in drop-down menus are appropriate.	This can be blank or default to the most applicable selection.

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50. All pricing is showing on the form and is correct.	
51. Subtotal boxes appear where applicable.	If registration options are separated into groups, a subtotal box for each section helps the registrant keep track of their running total.
52. Early bird dates are correct.	Early bird dates are a good way to motivate people to register. Make sure the dates are early enough to give you an advantage too.
53. Required fields are correct.	Generally indicated by an * Don't require more information than necessary as this can frustrate registrants.
54. Cancellation policy is present and contains all pertinent information.	Your policy should state if refunds are available and if so, up to what date, how much it will cost to cancel and if substitutions are allowed.  See the article, "Cancellation Policies that Benefit Event Planners and Participants" at <a href="http://www.eply.com">www.eply.com</a> under resources.
55. Correct payment options are offered.	Make sure all of the payment types you allow are showing on the form.
56. Correct credit card types are offered.	Make sure all of the credit card types you accept are showing on the form.
57. A Statement indicates what vendor name will appear on the registrant's credit card statement.	It should be clear what vendor name will appear on the registrant's credit card statement to avoid refused charges because the registrant does not recognize the transaction.
58. Payable to and mail to details for cheque payment are correct.	If cheque payments are offered, make sure the payable to name and mailing details are included.
59. Correct tax is applied to pricing.	If taxes are being charged, check that the percentage is correct.

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60. Option to enter tax exemption number is available.	If tax is applied and any event attendees are exempt from taxes (some government workers), make sure there is a tax exempt option.
61. Tax number is present.	If you are collecting tax, you usually need to provide your tax number.
62. Privacy statement is present.	Help your event participants feel comfortable about registering by providing a privacy statement. Say how the data will and will not be used.
63. Disclaimer/waiver is present if required.	Make sure your waiver is worded correctly and seek legal advice about also receiving a signed hard copy.
64. Registrant must select disclaimer/waiver to agree/accept.	If a waiver is present, make sure it is a required field.
65. Are you happy with the look and feel of your registration form?	Imagine that you were going to register for the event, would you want to use the form and find the process easy?

**To join ePly's free monthly newsletter and receive more lists like this and other articles related to event registration, visit [www.ePLY.com/newsletter.html](http://www.ePLY.com/newsletter.html).**