

Dear Registration Form Tester,

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 developed a testing procedure that we use in our own day to day business and that we hope you will find useful too. Testing forms is a detailed process and this procedure 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.

Toll Free 1-800-507-3759
info@eply.com www.eply.com

Prevent Registration Nightmares With A Testing Procedure

Testing Procedure

Once you've reviewed your online registration form with the "Form Review Checklist" (download a copy at www.eply.com/downloads.html), you're ready to move on to the testing phase. Follow the procedure below to ensure that every detail is perfect before you start to receive registrations.

1. **Test Validations** – This includes testing required fields and fields where users must enter data in a particular format such as an email address.
2. **Check Pricing** - Select every registration option and combination to ensure that the pricing and totals are correct.
3. **Logic** – Check that the form doesn't allow invalid or conflicting selections.
4. **Submit the Form** - Enter meaningful data into the form and submit test registrations.
5. **Review Thank-You Pages** - Thank-you pages appear once a form has been submitted.
6. **Review Reports** - The reports are your command centre and once you've submitted test registrations you should look at how the data is going into the reports.
7. **Review System Emails** - System emails include confirmation emails, receipts and invoices and you may need to submit multiple test registrations with different payment options in order to see all of the emails.
8. **Review System Settings** - System settings can include such details as the event close date and close text.
9. **Miscellaneous** – Just because it falls under miscellaneous, it shouldn't be an afterthought.

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1. Validations

Validations are an important part of getting quality registration details as they help ensure that the correct information is being submitted. You can check that validations are set by attempting to submit the form with missing or invalid information.

What to check	Procedure and Comments
1. Fields marked as required are actually required.	The form should not submit if any required fields are left blank, including fields in contact information, registration options and pricing.
2. Error messages appear when a required field is left blank and the messages are appropriate and helpful.	An error message should appear beside or above each field and should be specific to the information that is being requested. i.e. Please enter your first name.
3. If data must be entered in a specific format (typically email address, zip/postal code, phone number, member number, etc.), only valid formats are accepted.	Enter invalid data into fields with validation and check that error messages appear requesting that the data be corrected. i.e. Please enter a valid email address.
4. The form will not submit unless a payment option is selected when a balance is showing.	If your event has a fee, make sure the form cannot be submitted without selecting a payment option. If a participant can register without incurring a fee for a paid event, (sponsors or comp registrations), make sure that these people can register without selecting a payment option.
5. Only valid promo or other pre-assigned codes can be submitted.	Try submitting the form with both valid and invalid codes. Try entering the code with extra digits at the beginning or end to ensure that the code has been properly restricted.

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2. Pricing

Errors are eliminated because the registration system automatically calculates prices, but you still need to check that the pricing in the system is correct.

What to check	Procedure and Comments
6. Pricing is correct when registration options with a fee are selected.	Go through your form and select every option with a fee to check that the amount that appears is correct.
7. Discounts are calculating correctly.	If discounts are calculated based off previous selections (i.e. member), make the required selection and go through the registration options again.
8. Tax is calculating correctly.	If applicable, check that the correct tax rate is applied to all fees.
9. Early bird/late registration fees.	If fees change throughout the registration period, check that fees are set to change on the assigned dates.

3. Logic

Even if the participants aren't in a logical frame of mind, the online form will force them to respond in a logical way. By disabling and enabling options based on previous selections, the online form guarantees that only the correct selections can be made.

What to check	Procedure and Comments
10. Invalid or conflicting selections are not allowed.	<p>Try to make as many invalid or conflicting selections as you can think of.</p> <p>For example, if you've selected a full registration option, then you should no longer be able to select a single day registration option.</p>

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<p>11. Logic is set to guide people through the registration form.</p>	<p>Each selection should guide the participant to the next correct selection.</p> <p>For example, if you indicate that you are member, then it should only be possible to make other member related selections.</p>
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4 - Submit the Form

Once you think that the form is only going to accept correctly formatted data and correct selections, submit the form using real data that will be meaningful when you look at it in the emails and reports. Because you want to receive any confirmation emails, receipts or invoices, use your own email address in your test registrations.

What to check	Procedure and Comments
<p>12. Submit the form several times, each with different registration options.</p>	<p>By selecting different registration options, you'll be able to see how each one appears in the registration details of the confirmation email and in the reports.</p>
<p>13. Submit the form with each different payment options</p>	<p>By submitting the form with each of the available payment options, you will be able to view the thank-you page for each and the different system emails.</p>

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5 - Thank-you Pages

The thank you page will be displayed after the registration form has been submitted. Slightly different versions of this page are generally displayed depending on the type of payment selected.

What to check	Procedure and Comments
14. Images are correct and of good quality.	If your form is branded, then the thank-you page should remain consistent. However, keep it simple as participants have just left the form and generally don't spend long on this page. Images such as sponsor logos and other event details may not need to be repeated here.
15. A thank you message appears.	A thank you message provides participants with confirmation that their registration was successfully submitted.
16. A link back to the event website appears.	As participants generally only stay on the thank-you page briefly, it's a good idea to include links back to your website or other points of interest.
17. Links go to the correct location.	Links back to the event website or other relevant locations are often provided on the thank-you page. Click each link to ensure that it goes to the correct location.
18. There is an option to return to the registration form and to submit another registration.	If it's appropriate for participants to submit more than one registration, include a link so that they can return to the form with one click.
19. Merchant details are correct on the credit card thank-you page.	The thank-you page shows the details of an approved credit card transaction, so the merchant details should appear. You want to take every opportunity to let participants know what merchant name will appear on their credit card statement.

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20. The declined Credit Card Page offers appropriate instructions.	Provide instructions about what to do if a credit card is declined. i.e. Click back and try entering a different credit card number or select a different payment option.
21. Payment information is correct on the cheque thank-you page.	Rather than providing detailed payment instructions on the thank-you page, let participants know that they will receive an invoice at the email address they entered.

6 - Reports

Everything that you have done so far has been leading you towards the reports which will become the command centre of your registration process. This step is often overlooked, but it's important that you go behind the scenes and look at how the data is going into the reports.

What to check	Procedure and Comments
22. The data appears correctly.	<p>Check that the data that you entered appears next to the corresponding fields.</p> <p>i.e. Your email address appears in a field titled "Email".</p>

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<p>23. The data is meaningful.</p>	<p>This refers to the way in which both the questions and responses appear.</p> <p>For example, if there is only one registration option, then the following would be meaningful: Question: Conference Registration Response: Yes</p> <p>If there are multiple conference registration options, then a yes reply would not tell you which option participants had selected and the following format would be required: Question: Conference Registration Response: Tuesday Seminar Only</p>
<p>24. Guest data appears correctly.</p>	<p>If the main participant can register guests, check that the guest details are correct and that the reports show that the guest is related to the participant.</p>

7 - System Emails

When a registration is submitted, a number of emails are automatically generated including confirmation emails, receipts and invoices. Remember that in order to receive any system emails you must have entered your own email address in your test registrations.

What to check	Procedure and Comments
<p>25. Confirmation email is received.</p>	<p>In addition to the main participant, a confirmation can also be sent to a registered guest if their email is submitted.</p>
<p>26. Receipt is received if credit card payment was selected and approved.</p>	<p>If payment is by credit card, the receipt is an important email as it is the participant's record of the online transaction.</p>

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<p>27. Invoice/payment reminder is received if cheque or other payment type is selected.</p>	<p>This is another important system email as it's the participant's prompt to follow up with payment.</p>
<p>28. From name in all emails is correct.</p>	<p>Use an actual name rather than an email address and choose a name that participants will recognize. (this could be an event or organization name if you prefer not to use a personal name)</p>
<p>29. From email address in all emails is correct.</p>	<p>Participants may reply to the confirmation email if they have questions, so the email should go to somebody who is prepared to respond.</p>
<p>30. Subject line in all emails is appropriate.</p>	<p>Provide a descriptive subject line that participants will recognize and want to open. As two emails are often received, specify in the subject line if it is a confirmation, receipt or invoice.</p>
<p>31. The body of the confirmation email contains the correct details.</p>	<p>As you don't want to clutter the registration form with too much detail, the confirmation email is a perfect avenue for providing helpful information such as itineraries, accommodation and transportation information and links to maps.</p>
<p>32. Links are shown as complete addresses.</p>	<p>Email can be viewed as html or text only. When viewed as text only, it's not possible to click on links, so it's good practice to show complete addresses that the reader can cut and paste into their browser.</p>
<p>33. Event description is correct in the receipt.</p>	<p>As the receipt is the participant's record of their online transaction, you may want to use a more descriptive event description by including other details such as the event location or date.</p>

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<p>34. Merchant details in credit card receipt are showing and are correct.</p>	<p>Not only are online transactions more readily forgotten, but participants don't always recognize the merchant when viewing their credit card statement. As a permanent transaction record, it's important to provide detailed merchant info in the receipt as well as information on how to contact the merchant with questions.</p>
<p>35. Payment instructions are included in invoices/payment reminders.</p>	<p>Include detailed instructions such as the payable to and mail to for cheque payment and when payment must be received by.</p>

8 - System Settings

The system settings are ones which you may need to check by logging into the online registration system or by confirming with your online registration provider.

What to check	Procedure and Comments
<p>36. Close date and time are set and correct.</p>	<p>This is the pre-set date and time at which the online form will close.</p>
<p>37. Close text is correct.</p>	<p>This is the text that will appear if a participant tries to access the online form after it has closed.</p> <p>You may want to provide contact information or information on future events.</p>
<p>38. Registration limits are set.</p>	<p>If any of your registration options have a pre-set limit, make sure that these limits and the corresponding sold out messages have been set before going live.</p>

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9 - Miscellaneous

What to check	Procedure and Comments
39. Formatting does not change when the form is viewed in different browsers.	<p>Because each browser reads things differently, what might look good to you might look quite different when viewed by somebody else using a different browser.</p> <p>Copy the form url into different browsers (i.e. Internet Explorer, Mozilla Firefox, Netscape) and check that the form appearance is consistent.</p>
40. System logins are set.	<p>Before you need to work with the registration data, check that everybody who will be needing system access has a login at the access level you want to give them.</p>
41. Links to the registration form are correct	<p>Test all links to the registration form and make sure they use they are pointing to the exact URL given by the registration supplier.</p>

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