



CHALLENGING. INSPIRING. CAREER ADVANCING.

REGISTRATION / PURCHASE GUIDE

This **Step-By-Step Guide** has been developed to assist you in completing your group registration (5 or more attendees) with an easy-to-follow process.

Please note, the same registration process applies for individuals.

If at any point you need assistance, please feel free to reach out to our registration team at: registrar@fmi.ca, or call our lead Silvia Villon at 613-569-1158 ext. 205.

When registering, you are not required to enter all of your attendees' information in one step. You can start the registration process, purchase the number of passes that you desire, and you will be able to return to your personal account to finish assigning the passes before the deadline date of **November 6th, 2023**.

IMPORTANT DEADLINES:

The last day to cancel your registration and receive a full refund is **September 30th, 2023**

The last day to assign your passes or add/change session* day(s) is **November 6th, 2023**. There will be no changes to passes after that date. **Session day selections are subject to availability for in-person type pass options.*

On-Demand– what is it?

The on-demand pass option provides online access to the recordings of the PD Week presentations following the event. **** Please note that there is no “virtual or live streaming” for PD Week ****

On-demand recordings are available to access for a period of three months; **Monday, November 27th, 2023 – Thursday, February 29th, 2024**.

Select the pass type to access the 2023 program that's best suited for yourself or your attendees: **in-person only, on-demand only** or the best value All Access, **in-person and on-demand**.

Additional details on pass options can be [found here](#)

Follow these steps to register yourself or your group:

- A- Enter your email on the REGISTRATION PAGE (page 2)**
- B- Select your PASS TYPES (page 4)**
- C- Assigning session day(s) and TBDs (page 4)**

- D- Review your REGISTRATION SUMMARY (page 6)
- E- Complete your payment on the CHECKOUT PAGE (page 7)
- F- Log into your PERSONAL ACCOUNT (page 8)
- G- View your REGISTRATIONS (page 9)
- H- ASSIGN YOUR REMAINING PASSES BY NOV.6TH! (page 10)

A- Enter your email on the REGISTRATION PAGE

On the registration page, you will see the event title, date, event details, and at the bottom, the registration area.

The first field in the registration area is for the purchaser (1).

The purchaser is the one who receives the invoice or receipt, and their information will be included at the top of the invoice.

The purchaser can be a group coordinator (who registers multiple attendees) or an individual who registers themselves for the event.

(1) If you are a group coordinator, be sure to enter your email address in this field, do not enter the attendee's email.

(2) If there is someone other than yourself that also needs to receive a copy of the invoice by email – simply enter their email in this field.

Click 'Continue' to proceed.

(If your email is already in our system, you will automatically be taken to the next registration page where you select your pass type, and number of tickets)

Registration

To register yourself or a third party (group), please enter your e-mail address to begin the registration process. (You will be the primary registrant and your name will appear on the invoice/receipt as the payer). All attendees will receive a confirmation email.

Should you not be able to complete the registration process in one sitting, any information you have entered will be saved and your registration will continue from where you left off when you return. Your contact information will be kept on file.

Purchaser E-mail:

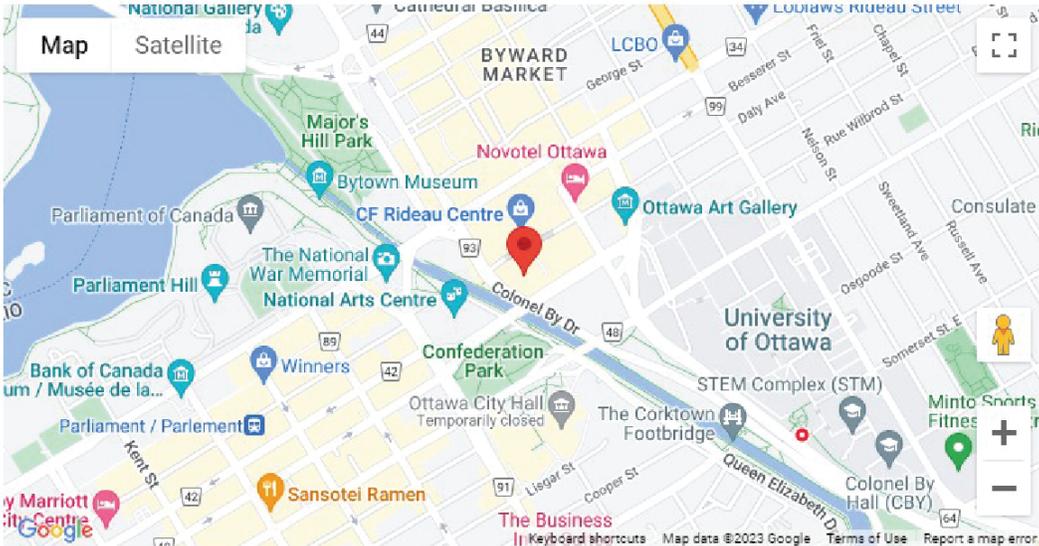
jill.peters@fmi.ca 1

If someone other than yourself is to receive an invoice for this purchase, please provide the email below:

2

Have a promotional code? Enter it here.

Promotional Code





If your email address is new to our system, a form will pop up (3) to prompt you for your information.

Please remember to enter the same email address you have entered in the 'Purchaser' email field (1)

Completing this form is a necessary step in order to create an active account. This will allow you (as the purchaser) to proceed with your registration.

All of the input fields with an * asterisk are mandatory. You will only have to fill out this information once.

Be sure to check the boxes at the bottom of the

*page to set your communication preferences to receive updates from fmi*igf!*

Click 'Continue' (4) to proceed.

fmi*igf

PD WEEK 2023

Date: November 21, 2023 - November 24, 2023
Location: Shaw Centre, 55 Colonel By Dr Ottawa ON

Profile Information

Your email is **not** registered in our system, please complete your profile to proceed with your registration.

Required Field *

| | | |
|----------------|----------------------------|------------------------------|
| * First name | Address | * Phone |
| * Last name | Suite/Floor/Office | * Select Language preference |
| * Title | City | * Select Chapter Affiliation |
| * Department | * Select Province or State | |
| * Company Name | Select Country | |
| | Postal or Zip | |

Your E-mail

* your_email@company.ca
* Confirm E-mail

Password

* Password
* Confirm Password

Event registration affiliates you to a Chapter, it does not automatically make you a fmi*igf member.

I authorize Financial Management Institute of Canada to register me as a fmi*igf member
 I authorize Financial Management Institute of Canada to e-mail me news, updates and event information.

Back Continue

B- Select your PASS TYPES

Scroll down the page and you will see the three Pass Types (5) for PD Week.

- In-Person Only
- In-Person with On-Demand
- On-Demand Only **

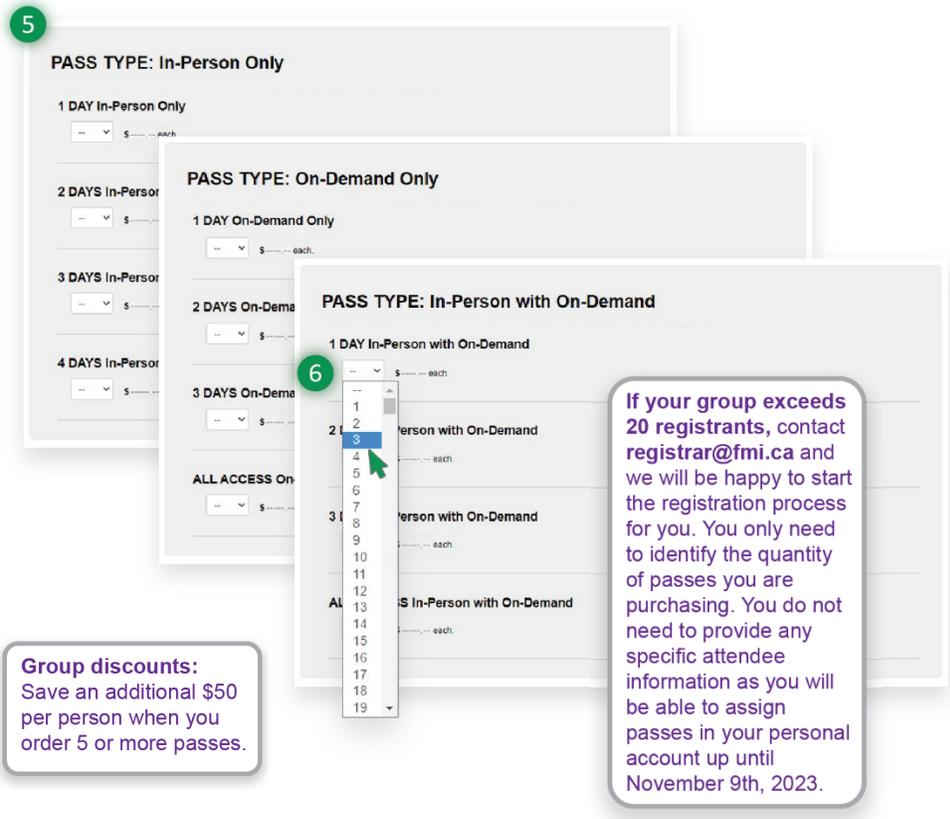
**** The on-demand pass option provides online access to the recordings of the PD Week presentations following the event.**

**** Please note that there is no “virtual or live streaming” for PD Week ****

On-demand recordings are available to access for a period of three months;

Monday, November 27th, 2023 – Thursday, February 29th, 2024

For this example, let’s say I want to register three people for the 1 Day In-Person with On-Demand option. (Prices are not shown in this guide)



Hover over and select the number of tickets you would like to purchase. In this case I want to purchase three tickets (6).

You can select passes of any combination across all pass types.

Note: You can select up to a maximum of 500 tickets at a time. Contact registrar@fmi.ca for help with starting this registration process if you have a large group.

Once you have selected your total number of passes from the dropdown (6) the system will display a Pass record for each.

C- Assigning session day(s) and TBDs

These are the session day themes for PD Week 2023:

| | | |
|--|--|---|
| <p>Tuesday, November 21 Hot Topics – Adapting to a Changing World</p> | | <p>Thursday, November 23 Technology, Innovation, and Experimentation</p> |
|--|--|---|

Wednesday, November 22
Excellence and Evolution

Friday, November 24
Mobilizing People – Achieving Personal Excellence

PASS TYPE: In-Person with On-Demand

1 DAY In-Person with On-Demand

3 \$ --- -- each

Attendee #1: **7**

| | | |
|-----------------------|--------------|----------------------------------|
| First Name* | Last Name* | Company* |
| Jill | Peters | Financial Management Institute o |
| Title | Telephone | E-mail Address* |
| Operations Specialist | 613-569-1158 | jill.peters@fmi.ca |

Food Allergies

Sessions

Nov 21, 2023 : 8:40 AM - 4:00 PM Tuesday - Hot Topics

Nov 22, 2023 : 8:40 AM - 4:00 PM Wednesday - Leading Pr

Nov 23, 2023 : 8:40 AM - 4:00 PM Thursday - Technology, In

Nov 24, 2023 : 8:40 AM - 4:00 PM Friday - Mobilizing People

Send Calendar Invite

Attendee #2:

| | |
|-------------|------------|
| First Name* | Last Name* |
| TBD | TBD |
| Title | Telephone |
| | |

Food Allergies

Sessions

Nov 21, 2023 : 8:40 AM - 4:00 PM Tuesday - Hot Topics

Nov 22, 2023 : 8:40 AM - 4:00 PM Wednesday - Leading Pr

Nov 23, 2023 : 8:40 AM - 4:00 PM Thursday - Technology, In

Nov 24, 2023 : 8:40 AM - 4:00 PM Friday - Mobilizing People

Send Calendar Invite

Attendee #3:

| | | |
|-------------|------------|-----------------|
| First Name* | Last Name* | Company* |
| TBD | TBD | TBD |
| Title | Telephone | E-mail Address* |
| | | TBD |

Food Allergies

Sessions

Nov 21, 2023 : 8:40 AM - 4:00 PM Tuesday - Hot Topics

Nov 22, 2023 : 8:40 AM - 4:00 PM Wednesday - Leading Practices in Comptrolership

Nov 23, 2023 : 8:40 AM - 4:00 PM Thursday - Technology, Innovation, and Experimentation

Nov 24, 2023 : 8:40 AM - 4:00 PM Friday - Mobilizing People

Send Calendar Invite

Back Continue

Notice, that by default, after you select the number of tickets you want to purchase, your name and email will automatically populate first attendee field (7). Our system will always add the purchaser's information (1) as the first attendee.

IF YOU ARE NOT ATTENDING the event, you must change the first attendee fields to another name/email or to TBD in capital letters... otherwise you will be registered as an attendee.

At this point, you can assign any session day(s) to attend for each attendee to proceed with your order **(8)**. If you enter an email address, you must assign a session day for that person. They will be able to adjust the day in their own profile in the Members Area.

Remember that you must select the appropriate number of session day(s). This is based on your pass type. (ie. – for a 3 day On-Demand pass you will need to select 3 session day(s). In this case, select one session day per attendee. If you make a mistake, the system will alert you to select the appropriate amount.

TBD

Notice that all other fields (other than first attendee) have been set to **TBD (9)** by default. If your attendee information is not readily available or you are unsure of who is attending, you may enter TBD into the

fields. (It must be TBD (in capital letters) and no other text).

You can proceed with the registration using TBD. After completing the registration, you will be able to log into your personal account and assign the TBD fields to the proper attendee. (See the last section of this guide).

For the TBD fields, you DO NOT need to select the session day(s). After your registration is completed, your attendee will also be able to select their session day(s), as they will be able to log into their personal account and do so, up until the session* day change deadline – Nov. 6, 2023. *Session day selections are subject to availability for in-person type pass options.

Of course, if you know who will be attending, go ahead and enter all of the information at this point. Everyone whose email is entered will receive an event registration confirmation email.

Click 'Continue' to proceed to the Order Summary Page.

D- Review your REGISTRATION SUMMARY

Review your Registration

PD WEEK 2023

Date: November 21, 2023 - November 24, 2023
Location: Shaw Centre, 55 Colonel By Dr Ottawa ON

Profile Information

Name: Jill Peters
Company Name: Financial Management Institute of Canada
E-mail: jill.peters@fmi.ca

4 DAYS In-Person Only

(2 Attendees)

Attendee

Name: Jill Peters
Company Name: Financial Management Institute of Canada
E-mail: jill.peters@fmi.ca

Attendee

Name: TBD TBD
Company Name: TBD
E-mail: TBD

12

1 DAY In-Person with On-Demand

(3 Attendees)

Attendee

Name: Jill Peters
Company Name: Financial Management Institute of Canada
E-mail: jill.peters@fmi.ca

Sessions

Nov 22, 2023 (8:40 AM : 4:00 PM) - Wednesday

Attendee

Name: TBD TBD
Company Name: TBD
E-mail: TBD

Attendee

Name: TBD TBD
Company Name: TBD
E-mail: TBD

ALL ACCESS On-Demand Only

(1 Attendee)

Attendee

Name: Jill Peters
Company Name: Financial Management Institute of Canada
E-mail: jill.peters@fmi.ca

Make sure you scroll further down the order summary page to review your registration details before completing your registration!

The Registration summary page shows the event details, the purchaser information under the Profile Information and the pass type selected with details on the attendee and selected session day(s) (12).

Note that some of the attendee information is still set to TBD, which is fine, as the Purchaser, you can assign that later in your personal profile. *(The attendee will also be able to log into their personal account and select their session day(s)).*

All attendees whose email address was provided during the registration will get an event confirmation email, informing them that they have been registered for PD Week and providing them with their pass type and session day details. *This confirmation email will also inform them on how to log into their personal profile.*

The last date to assign your passes or add/change session* day(s) is **November 6th, 2023**. There will be no changes to passes after that date. **Session day selections are subject to availability for in-person type pass options.*

E- Complete your payment on the CHECKOUT PAGE

Order Summary

Please ensure the accuracy of the information on your order, or use the "back" button below to edit your order.

| Description | Purchaser | Unit Price | Quantity | Price |
|--------------------------------|-------------|------------|----------|-----------|
| 4 DAYS In-Person Only | Jill Peters | \$----- | 2 | \$----- |
| 1 DAY In-Person with On-Demand | Jill Peters | \$----- | 3 | \$----- |
| ALL ACCESS On-Demand Only | Jill Peters | \$----- | 1 | \$----- |
| Global Discount | Jill Peters | -\$50.00 | 6 | -\$300.00 |
| Sub Total | | | | \$----- |
| HST | | | | \$----- |
| Total (CAD) | | | | \$----- |

GST/HST# 12215 2358 RT0001.

Payment Information

Mode of payment *
 Credit Card Invoice

Selecting cheque and clicking continue will generate an invoice on your screen with mailing instructions. A copy of the receipt or invoice will also be sent to your e-mail.

P.O.Number:

Your payment will be processed when you click the "Complete Registration" button.

Name on Card *

Credit Card Number *

Expiry Date *
MM YYY

Security code *

Your payment will be processed when you click the "Complete Registration" button.
Please review information below to ensure its accuracy.

Please note that all credit card transactions will be processed immediately and will appear in your next credit card statement.

VISA **MasterCard** **Moneris SOLUTIONS**

Secure Online Transaction: You will receive an immediate confirmation of your transaction once it is processed.
Selecting cheque and clicking continue will generate an invoice on your screen with mailing instructions.
A copy of your credit card receipt or invoice will also be sent to your registration e-mail.

The **Order Summary** gives you all of the information for your registration: the number of tickets purchased, the pass types and total amount charged.

If you have an order of 5+ passes your discount per pass will be reflected on the Order Summary and the Invoice/Receipt, as a global discount.

The **Payment Information section (10)** provides different payment methods for your convenience. Simply select the mode of payment – credit card or invoice, and the system will provide the fields needed to complete the payment step.

You can use the **Back** button provided to go back to the pass selection page to make any necessary changes.

When you are ready, click on **Complete Registration (11)** to finish the registration process. An invoice is generated for you to save or download.

The invoice is also emailed to you as the Purchaser and is also available to view and download in your personal profile page. If you have entered a second email address on the first registration page (2), that person will also receive a copy of the invoice with all of the registration details.

IMPORTANT: The last date to cancel your registration and receive a full refund is **September 30th, 2023**

If you have requested an invoice and then decide that you would like to switch and to pay by credit card, please send an email to registrar@fmi.ca and they will be able to facilitate payment by credit card.

F- Log into your PERSONAL ACCOUNT

The image shows a screenshot of the fmi*igf website's login page. At the top, there are social media icons for LinkedIn, Facebook, and Twitter, along with language options for 'Sign In', 'ENGLISH', and 'FRANÇAIS'. The main logo 'fmi*igf' features a red maple leaf. Below the logo is a green banner with the text 'BECOME A MEMBER'. A dark grey navigation bar contains 'HOME' and 'Sign In'. The main content area has a white box titled 'SIGN IN AREA' with two input fields: 'Email Address' (with placeholder 'Enter your email') and 'Password' (with placeholder 'Enter your password'). A green 'Sign In' button is at the bottom right. A callout box with a green circle containing the number '13' points to the sign-in area. The callout text reads: '13 First-time login or you need to change your password? How to become a member? Simply [sign-up here](#)'. To the right of the main page, there is a separate white box titled 'FORGOT YOUR PASSWORD?' with the text 'Enter your e-mail address and we'll send you a link to reset your password.' and an input field with placeholder 'Enter your email'. Below this input field are 'Back' and 'Submit' buttons. To the right of the main page, there is a text box that says 'You can log into your personal account using this link: <https://crm.fmi.ca/login>'.

Once you have completed purchasing passes through our event registration page, you have the option to access your registration details via your personal profile page on the fmi*igf website.

Please login to your personal account using this link: <https://crm.fmi.ca/login>.

This is the login page for everyone, whether you are a Group Coordinator or an attendee. You both can log into your personal account and see your registration(s) and profile information.

If you are logging in for the first time in this portal, you need to reset your password before proceeding to access your profile. Otherwise, it prompts you with an error.

To do this, click on **'First-time login or you need to change your password?' (13)**.

Use this same link to reset your password. Once you click on the link, enter your email address (the same one you used on your PD Week registration page **(1)**). You will then receive an email with a link to reset your password.

(If you know someone who would like to create a new account, they can simply click on "become a member" at the top of the screen and follow the steps).

G- View your REGISTRATIONS

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Jill Peters Sign Out ENGLISH FRANÇAIS

fmi igf

MEMBERS AREA ▾ BECOME A MEMBER

HOME

Members Area

Welcome to your online profile, Jill Peters.

Navigation

- Members Area
 - My Profile
 - 14 My Registrations**
 - My Transaction History
 - My CPD Hours
 - Document Centre

Individual Information

ID: 00000

Company Name: Financial Management Institute of Canada

fmi*igf Membership Type: Regular

Chapter Affiliation: Capital Chapter (Ottawa/Gatineau)

Select **'My Registrations'** (14). As a group coordinator, you will be able to see view/edit all your attendee registrations. This is where you assign your 'TBDs'.

If one of your attendees logs into their own personal account, they will only see their registration information (they cannot see the other group registrant's information).

This is the home page example of a personal account. With this one main area, the user can update their profile information, see all of their event registrations, see all active National and Chapter events, purchase additional event tickets and download all of their invoices /receipts.

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Jill Peters Sign Out ENGLISH FRANÇAIS

fmi igf

MEMBERS AREA ▾ BECOME A MEMBER

HOME ▾ MEMBERS AREA

My Registrations

Navigation

- Members Area
 - My Profile
 - 15 My Registrations**
 - My Transaction History
 - My CPD Hours
 - Document Centre

| Event | FMI Host | Date | No. of Attendees | |
|--------------|----------|---------------------------------------|------------------|--|
| PD Week 2023 | | November 21, 2023 - November 24, 2023 | 6 | + Expand Buy Tickets |

After clicking on My Registrations (14), the system will display the **details of the Event (15)** along with information about the number of attendees you have registered.

H- ASSIGN YOUR REMAINING PASSES BEFORE NOV.6TH!

Navigation

Members Area

- My Profile
- My Registrations
- My Transaction History
- My CPD Hours
- Document Centre

| Event | FMI Host | Date | No. of Attendees | |
|--------------|----------|---------------------------------------|------------------|----------------------|
| PD Week 2023 | | November 21, 2023 - November 24, 2023 | 0 | Expand Buy Tickets |
| PD Week 2023 | | November 21, 2023 - November 24, 2023 | 0 | Collapse Buy Tickets |

| First Name | Last Name | Email | Ticket Type | Date of Registration | |
|------------|-----------|--------------------|--------------------------------|----------------------|------|
| Jill | Peters | jill.peters@fmi.ca | 4 DAYS In-Person Only | Sept. 14, 2023 | Edit |
| TBD | TBD | TBD | 4 DAYS In-Person Only | Sept. 14, 2023 | Edit |
| TBD | TBD | TBD | 1 DAY In-Person with On-Demand | Sept. 14, 2023 | Edit |
| TBD | TBD | TBD | 1 DAY In-Person with On-Demand | Sept. 14, 2023 | Edit |
| TBD | TBD | TBD | 1 DAY In-Person with On-Demand | Sept. 14, 2023 | Edit |
| TBD | TBD | TBD | ALL ACCESS On-Demand Only | Sept. 14, 2023 | Edit |

Page 1

3 TBD TBD TBD 1 DAY In-Person with On-Demand Sept. 14, 2023 Edit

First Name Last Name Company Title
TBD TBD TBD

Telephone Email

Dietary Requirements

Session(s)

- Nov 21, 2023 - Tuesday - Hot Topics
- Nov 22, 2023 - Wednesday - Leading Practices in Comptrollership
- Nov 23, 2023 - Thursday - Technology, Innovation, and Experimentation
- Nov 24, 2023 - Friday - Mobilizing People

SAVE

YOU MUST SELECT ALL SESSION DAY(S) and assign your tickets by November 6, 2023.

Select the **Expand (16)** button to see your registration information in more detail. *If you have entered any attendee details, they will be shown under First name, last name and Email, otherwise they are simply shown as TBDs.*

You can assign these TBD passes to the attendees by clicking on the **Edit (17)** button provided for each pass purchased.

Note: Before proceeding to assign TBDs, please gather mandatory attendee information like First Name, Last Name, Company of the attendee, Attendee Email without which you cannot complete assigning the pass to your desired attendee.

Please replace TBDs with relevant information and enter the details in the respective fields provided by November 6th.

In the **session day** area (18), you will need to select a checkbox for any of the day(s) available based on the ticket type shown under that pass in order to proceed.

Note: If you enter an email address, you must assign a session day for that person. They will be able to adjust the day(s) in their own profile in their Members Area.

The last date to assign tickets or select session* day(s) is November 6th, 2023. There will be no changes to registrations after that date. *Session day selections are subject to availability for in-person type pass options.

Please select only the exact number of days based on the Pass type. If you select more or less days than the Pass type, the system will not allow you to proceed further.

As Group Coordinator, you can also enter Dietary Requirements/Meal Choices at this moment, or you can come back later to

provide those details. You can also ask your attendees to login to their own personal profile page and enter those details under their pass.

Once you have entered all the necessary information, don't forget to click on the SAVE button to finish assigning that pass otherwise the system will not get updated accordingly.

Please reach out to us at registrar@fmi.ca if you require any assistance. We are happy to help!