

# eChapter.ca

Automating Organizations through Technology



## Where Processed

eChapter processes memberships and registrations for professional organizations through a dedicated and secure area on their website where the actual registration pages and databases for holding the data reside. Data is not shared with anyone outside of eChapter and representatives of our clients and our clients retain ownership of original data.

## Confidentiality

eChapter respects the value & confidentiality of any & all data involved in such an arrangement & will under no circumstances share this or any other confidential matters with other persons or organizations, including, but not limited to ISACA, CIPS, FMI, DRIE & WIA. eChapter principle is Barry Saunders.

For each event our clients are required to provide details (utilizing a Request for Service Form, with a standard list of items), an event write up page(s) and a Registration link on their website to the eChapter registration page.

## Documents sent via email eChapter will provide the following;

An invoice for each registrant indicating event and cost details.

A receipt for each payment received for each registrant. There is the availability for registrants to pay by credit card (CC fees are currently 2.8% plus \$0.25 per transaction, Amex slightly higher). There is no fee for processing payments received by cheque.

eChapterPromoBrochure

A notice to a person designated by the client of each person registering, as they register.

Clients are to provide details of Privacy, Cancellation & Substitution Policies.

## Reports

**eChapter to provide the following reports (posted on the web site in restricted and secure area)**

Reports posted regularly and more often as an event date approaches, accessible by those the client authorizes.

eChapter will provide a detailed fee receivable report organized by event and listing all outstanding invoices.

Detailed deposit reports by registrant (also summarized by payor cheque number and event). eChapter requires an ATM card allowing deposits (ONLY) to a client's bank account.

Produce name tags and/or Tent Cards for registrants in electronic (SNP) format, ready for printing by client (if required).

Provide the night before each event a Report **alphabetically** listing all registrants, indicating fees charged and payments received. This report is for use at check-in table at events, to keep track of who actually attends. Client is to provide, via email (scanned) or fax (same day as event), the actual attendance (check-in) sheet for event. Client provides coverage of actual registration (check-in) table. Attendance is tracked and if required CPE certificates are issued electronically.

A Receivable Report for unpaid fees and will assist in collections through emailing of past due invoices notices.

GST/HST and attendance details are provided on the registration reports for each event, once it is completed. These reports would reflect which attendees are GST exempt and charged accordingly.

There would also be detailed invoice and receipt journals produced for client's fiscal year. Reports are designed to enable organizations to audit or verify the processing of event registrations and the funds received thereon.

eChapter will provide an annual (period determined by client) events summary indicating; gross revenue, number of member, non-members, volunteers, speakers, or guests and total attendees for each event. Client would provide written instructions as to who would be appropriately included in each category of attendee.

## Membership

A separate form to capture membership data and generate invoices for dues can be created upon request. The client is responsible for maintaining membership records and providing any audit or verification of people registering as members, speakers or guests. For purposes of applying the minimum fee, this function would be considered a single annual event.

## FEES

All invoicing for all events is to be done using eChapter and our fee is 2% of the gross receipts per Event, collected directly or indirectly through the client (Minimum \$50.00/event). When gross receipts > \$250K rate is 1.75%, when gross receipts > \$500K rate is 1.50%, when gross receipts > \$1,000K rate is 1.25% and when gross receipts > \$1.500K rate is 1.00% References are available upon request.

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