



Thank you for your interest in the 2023 SBP Summit. Here you will find answers to your questions for registration. If there are any questions you need help with that are not answered, don't hesitate to reach out to info@sbpsummit.com or ryan@mcgstrategies.com to walk you through the process and help you register!

Clicking the Hyperlinks will take you directly to that section of the instructions. At the bottom of each page is a hyperlink that returns you to the Table of Contents.

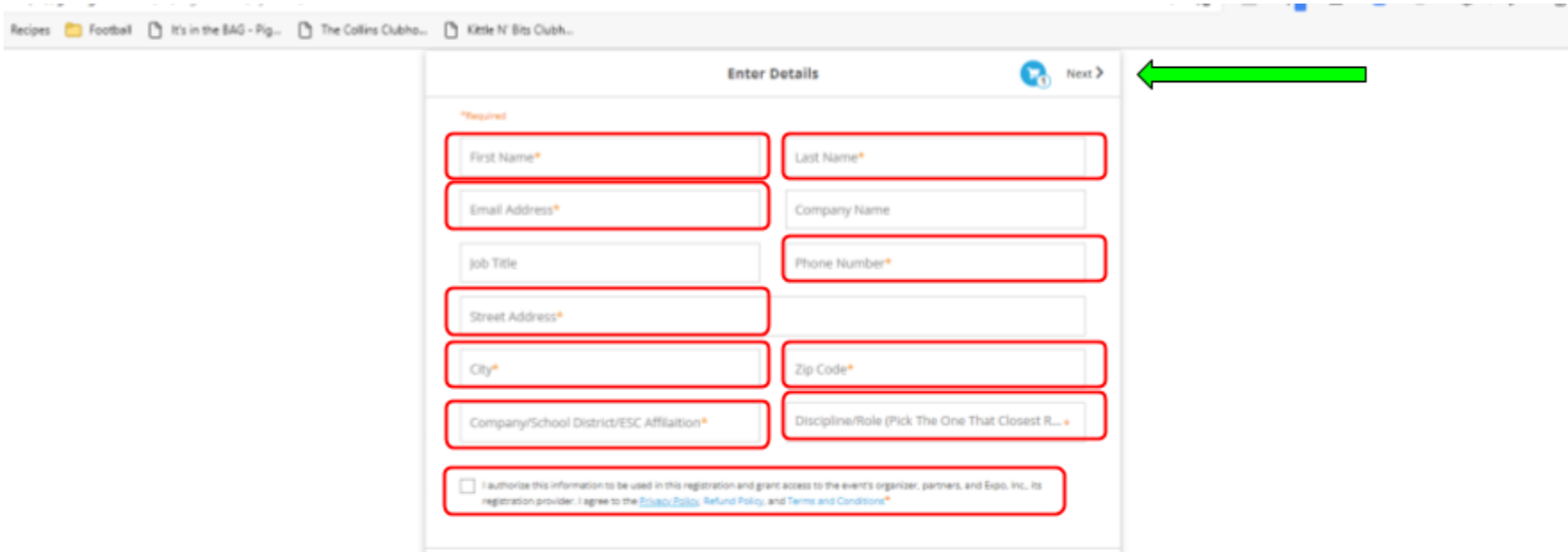
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Items to Fill Out On Registration Page:

- 1) When the Registration Page Loads, you will be able to start inputting data. Anything marked with a (*) is REQUIRED. You will not be able to move on with Registration if one of those fields is not filled in. They include: **First Name, Last Name, Email, Phone, City, Zip Code, School District/Company/ESC Affiliation, Role/Discipline, Dietary Restrictions, Food Allergies (not required, but if this is not filled in, we cannot make adjustments)** and **Agreement to Terms and Conditions, Refund Policy**.



The screenshot shows a web browser window with several tabs open. The active tab is titled "Enter Details". The form contains the following fields:

- First Name* (outlined in red)
- Last Name* (outlined in red)
- Email Address* (outlined in red)
- Company Name
- Job Title
- Phone Number* (outlined in red)
- Street Address* (outlined in red)
- City* (outlined in red)
- Zip Code* (outlined in red)
- Company/School District/ESC Affiliation* (outlined in red)
- Discipline/Role (Pick The One That Closest R... (outlined in red)
- I authorize this information to be used in this registration and grant access to the event's organizer, partners, and Expo, Inc., its registration provider. I agree to the [Privacy Policy](#), [Refund Policy](#), and [Terms and Conditions](#).* (outlined in red)

A green arrow points to the "Next >" button in the top right corner of the form.

- 2) All required fields are outlined in red above.
- 3) Hit the **"NEXT" Button** (TOP RIGHT) when finished
- 4) If you are missing a required field, please make sure all of the required fields are filled out or selected

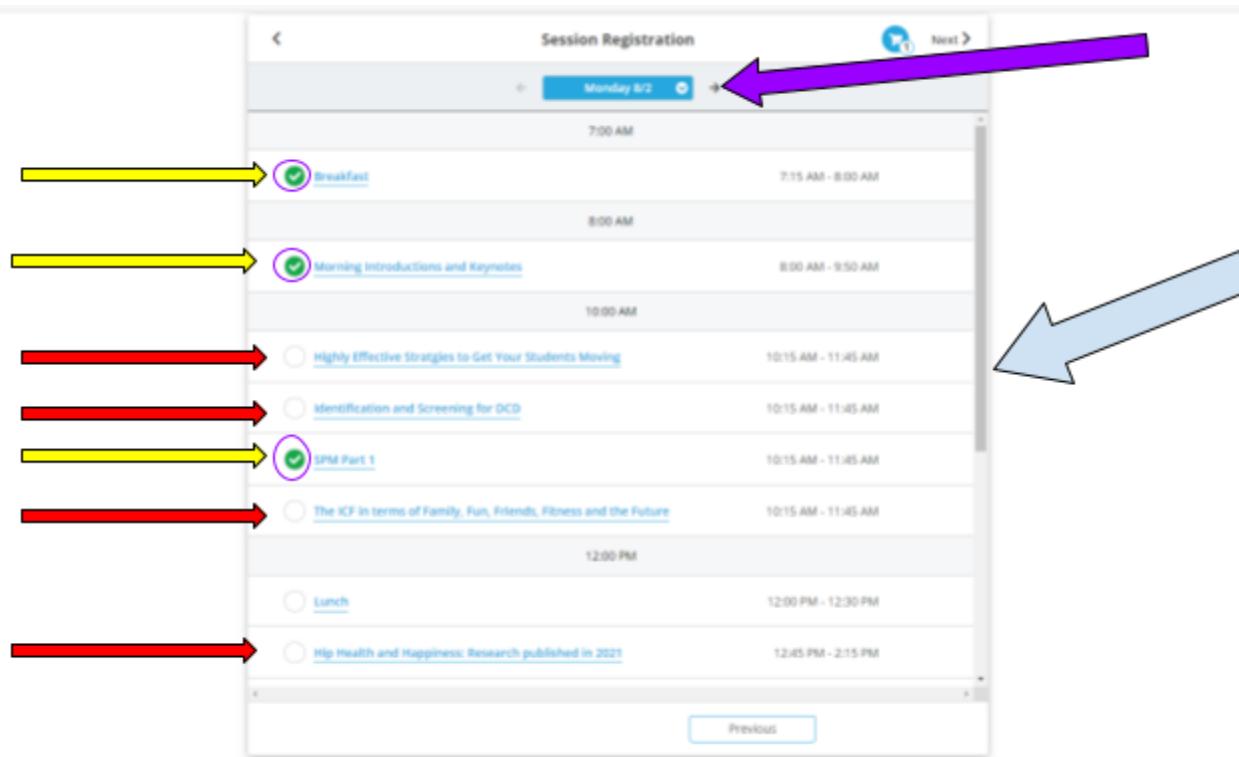


Payment Options and Methods:

- 1) This will be discussed during the Checkout page (see hyperlinks below). You will not have to choose your payment method until the end.
 - a) You will have the option to pay by [Credit Card](#) (payment due at the time of checkout)
 - b) You will have the option to pay by [check or invoice \(offline payment\)](#)
 - i) Payment will be due before the conference
 - ii) CEU documentation/certificate will be held if payment is not received
 - iii) **SBP Summit considers your registration/invoice email to serve as the invoice.** If your district or treasurer needs anything else for payment, you or they MUST reach out to info@sbpsummit.com with a request.
 - iv) SBP Summit **will not** be sending your district/treasurer/CFO an invoice unless requested.
 - v) The W-9 for OSHA can be downloaded from [HERE](#).

Course Selections

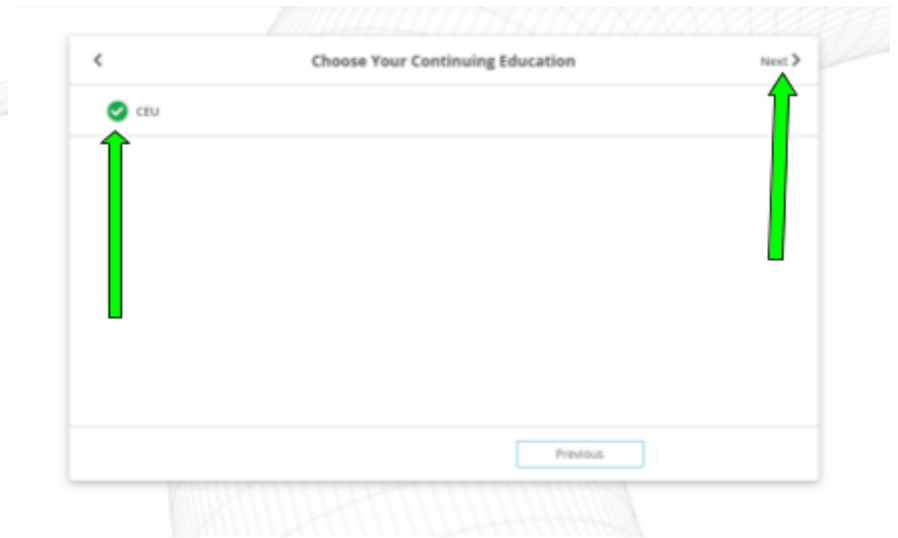
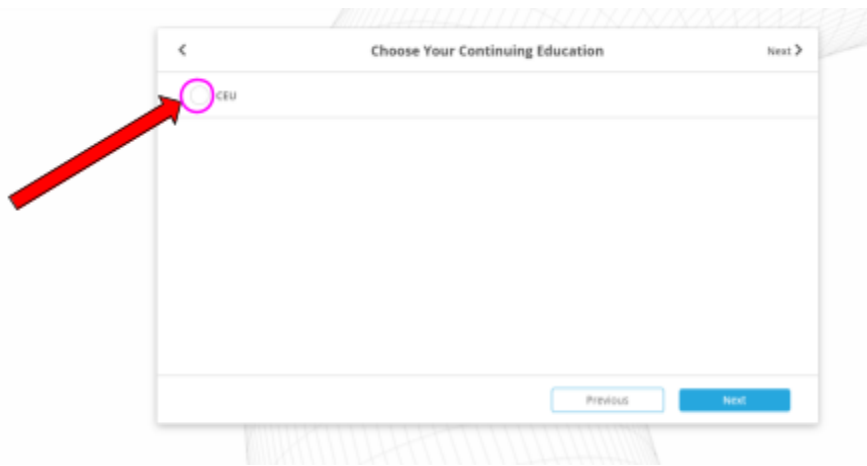
- 1) Please select the courses you plan on attending. You should choose one session per time block (keynote/morning intros count as a time block). (Total of 4 on Monday, 4 on Tuesday) There are 6 or 7 sessions available per time block.
- 2) Check all the courses you want to register for. **Click on the BLUE Session Name for a description of session and speaker bio.**
 - a) **YELLOW ARROWS** show selected courses (circle becomes a green check mark) with the circle box highlighted in **PURPLE**
 - b) **RED ARROWS** show unselected courses
- 3) You may need to scroll down to highlight all the courses, depending on monitor size/resolution
 - a) Highlighted by the **PALE BLUE ARROW**
- 4) After finishing Monday's selections, click the blue box at the top for Tuesday's selections (**PURPLE ARROW**). If you forget to select Tuesday, you will get a pop-up asking you to fill it out



- 5) Click the BLUE "Next" button in top right corner

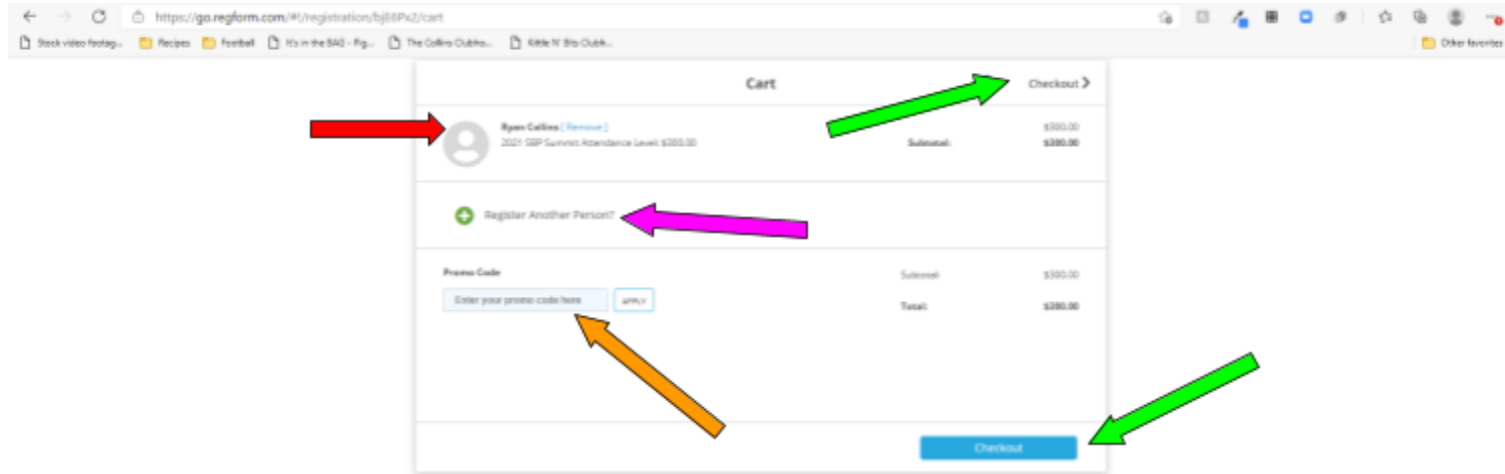
Choose Your Continuing Education

- 1) To gain credit toward CEU hours, click the circle to the left of the CEU box. There is only one type of CEU hours offered through the registration platform. Just make sure to click the box (**RED ARROW** and **PINK CIRCLE**) ***LEFT PICTURE***
 - a) A GREEN Check mark will appear once clicked ***RIGHT PICTURE***
- 2) Click the Blue "Next" button in the top right corner



Cart

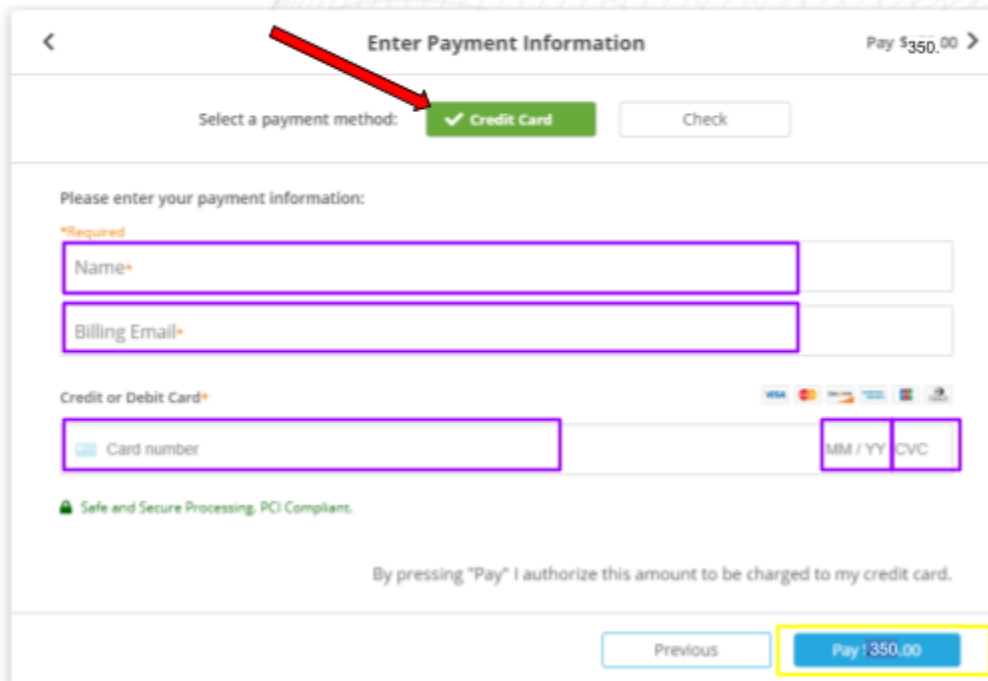
- 1) Once you have selected the CEU option, you will be taken to your cart. Please make sure the name and payment method is correct.
 - a) Name highlighted by **RED ARROW**
 - b) Have a promo code? Enter it here, highlighted by **ORANGE ARROW**. **CLICK APPLY BUTTON (Subtotal and Total will reflect price change)**
 - c) Need to start over? Click on the Blue “REMOVE” link by the name (RED ARROW) and start the process over.
- 2) If everything looks correct, click “Checkout” in the top right hand corner or bottom right hand corner.
 - a) Highlighted by **GREEN ARROW**



- 3) Need to register another person? Find more [HERE](#), but highlighted by **PINK ARROW**

Credit Card Checkout

- 1) When you get to the Checkout, make sure credit card is selected (**RED ARROW**)
- 2) Enter Name, Email, Credit Card Number, Expiration Information and CVC (3 or 4 digit code on back of card) into the required areas (**PURPLE BOXES**)
- 3) Hit the Blue “Pay \$350.00” Button (**Yellow Box**)



< Enter Payment Information Pay \$350.00 >


Select a payment method: Credit Card Check

Please enter your payment information:


***Required**

Name*

Billing Email*

Credit or Debit Card* 

Card number MM / YY CVC

 Safe and Secure Processing. PCI Compliant.

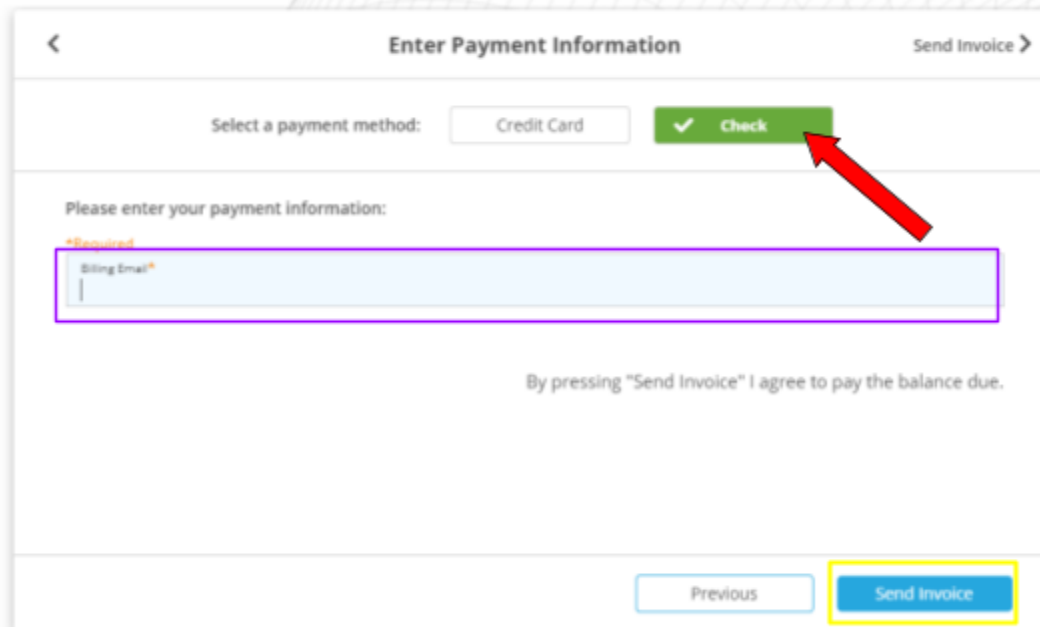
By pressing "Pay" I authorize this amount to be charged to my credit card.

Previous

- 4) You are REGISTERED! You will get a confirmation email from support@exposent.com with a subject of: SBP Summit: Your Registration Confirmation!

Purchase Order/Invoice Checkout

- 1) When you get to the Checkout, make sure **CHECK** is selected (**RED ARROW**)
- 2) **Enter the email of your Treasurer/CFO/Purchase Manager** and a copy of the invoice will be sent directly to them! (**PURPLE BOX**)
- 3) You will still receive an email confirmation in your inbox. You have the option to send the invoice to yourself as well.
- 4) Hit the Blue “Send Invoice” Button (**Yellow Box**)



The screenshot shows a mobile application interface for entering payment information. At the top, there is a back arrow, the title "Enter Payment Information", and a "Send Invoice" button with a right-pointing arrow. Below the title, there is a section "Select a payment method:" with two buttons: "Credit Card" and "Check". The "Check" button is highlighted in green and has a white checkmark, with a red arrow pointing to it. Below this, there is a section "Please enter your payment information:" with a red asterisk and the word "Required" above a text input field labeled "Billing Email". This input field is highlighted with a purple border. Below the input field, there is a line of text: "By pressing 'Send Invoice' I agree to pay the balance due." At the bottom of the form, there are two buttons: "Previous" and "Send Invoice". The "Send Invoice" button is highlighted with a yellow border.

- 5) After hitting the Blue “Send Invoice” Button, another box will pop up asking which attendees should receive confirmation, check all those that apply.
 - a) Payment will be due before the conference
 - b) CEU documentation/certificate will be held if payment is not received
 - c) ***SBP Summit considers your registration/invoice email to serve as the invoice.*** If your district or treasurer needs anything else for payment, you or they MUST reach out to info@sbpsummit.com with a request.
- 6) You are REGISTERED! You will get a confirmation email from support@exposent.com with a subject of: SBP Summit: Your Registration Confirmation!

Multiple Attendees:

- 1) A new and exciting feature is the ability to add multiple attendees within one order. No longer will your CFO/Treasurer/Purchase Manager need to collect multiple receipts for one large order or Purchase Order.
- 2) Anyone can create the multiple order as well. Therefore, one person can register multiple attendees if they choose to do so. Also, with a set number of classes for CEU credit, this process is easier than ever!
- 3) Register the first person as usual. Complete all the steps (Required info, Session Registration, CEU selection), the change comes when you get to the **CART**.
- 4) While in the CART, check to make sure the information (name and is correct, just like before **RED ARROW**). **DO NOT** hit the Checkout button just yet.
- 5) Right under the first attendee's name, is a "Register Another" button, highlighted by the **PINK ARROW**.
- 6) Click that button, it will save the first registration and send you back to the beginning of the form for Person #2, #3, #4, etc.
- 7) When everyone has registered, then you will Checkout. A screen will pop-up asking which emails you would like confirmation emails to go to. Select the attendees you want and click ok. Everyone will register at once. ***Please note: there is no way to save the form and send the link to another person for them to individually fill out their information. One person will be responsible for registering a group of attendees***

