

## CREATE AND MANAGE YOUR CHAPTER EVENTS ON THE ICF EVENTS PLATFORM

Home page of the events platform: <https://www.icf-events.org/>

Click [here](#) for direct access to the chapter events section

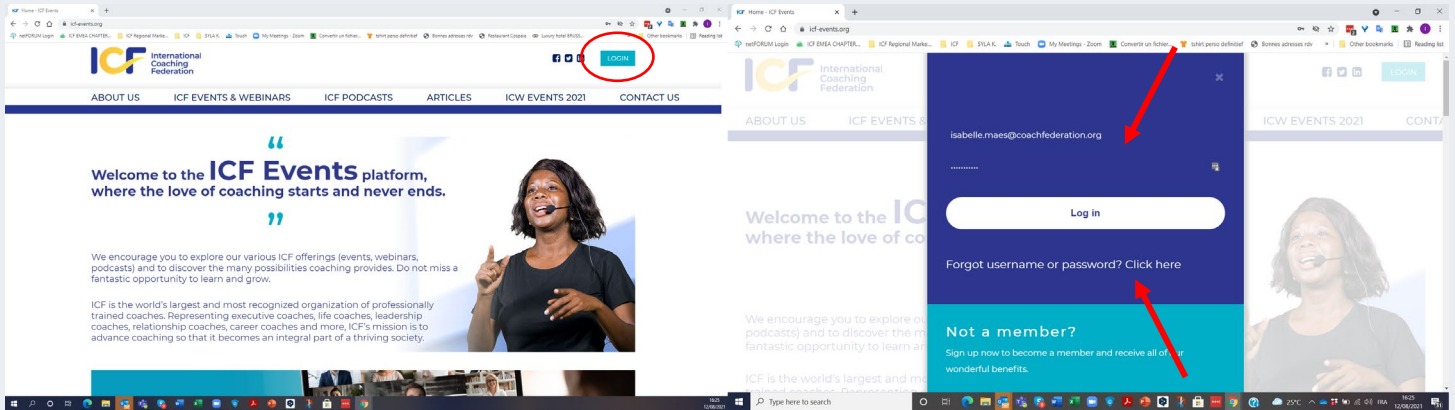
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## 1. LOG IN TO THE ICF EVENTS PLATFORM

To publish and manage your chapter events, click on the blue login button on the upper right and log in with your usual ICF member ID and password.

If you do not remember your password click on forget username or password to reinstate it through the ICF Global website.

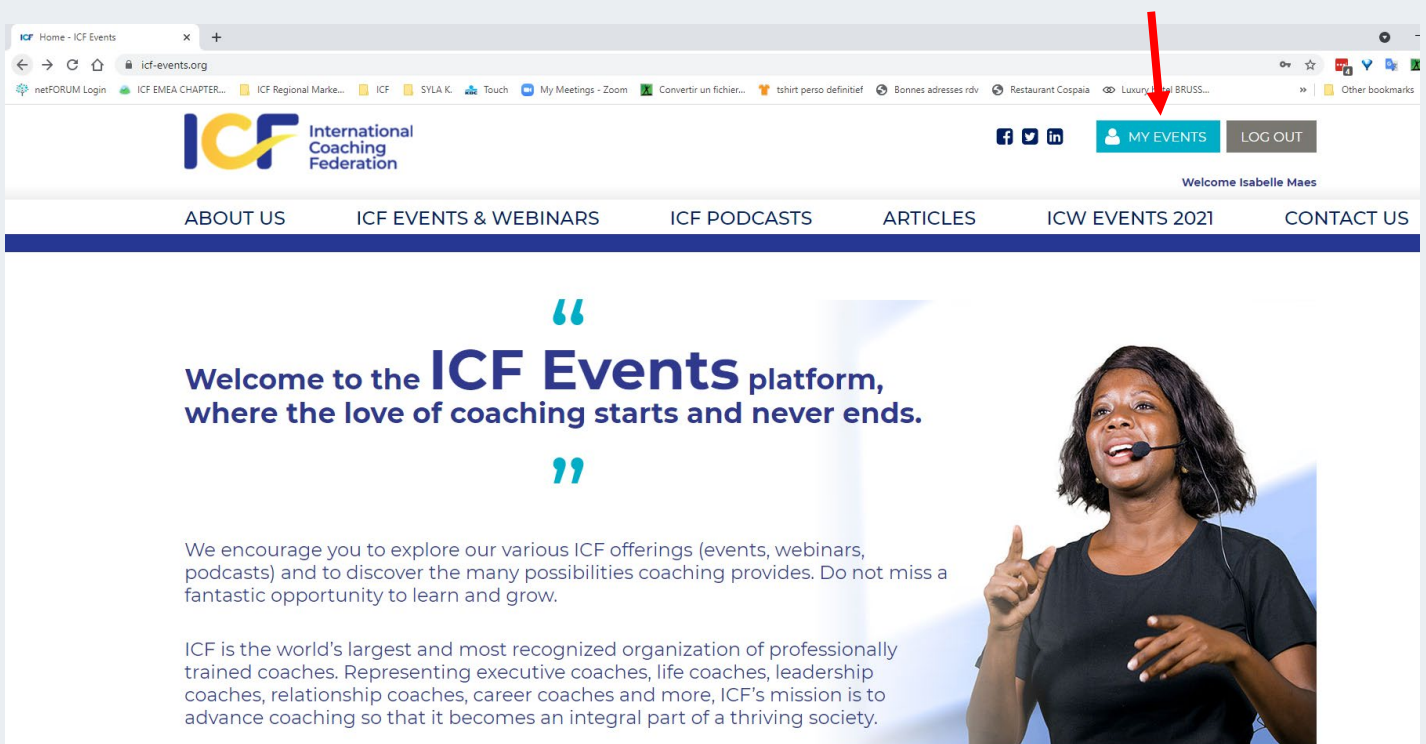


*Note: The chapter event creation option is only available for chapter leaders who are recognized as such in our ICF global database. If you can't access the event creation feature or if your chapter leadership has changed recently, make sure to connect with your [ICF Regional Development Manager](#) to update your chapter records.*

## 2. ACCESS YOUR ONLINE EVENT MANAGER

2.1. Once logged in, you will see your name appear under the login section and a new button called MY EVENTS will appear.

This button will give you direct access to your event manager where you will see all created events with your personal profile.



2.2. Once you click on MY EVENTS, you will see a blue button to add a chapter event as well as the list of all events created and a dedicated MANAGE button for each of your events

Click on the button ADD CHAPTER EVENTS & WEBINARS to start creating your chapter event.

ICF My events - ICF Events

icf-events.org/my-events/

netFORUM Login ICF EMEA CHAPTER... ICF Regional Marke... ICF SYLA K. Touch My Meetings - Zoom Convertir un fichier... tshirt perso definitief Bonnes adresses rdv Restaurant Cospaia Lib... hotel BRUSS... Other bookmarks

ICF International Coaching Federation

MY EVENTS LOG OUT

Welcome Isabelle Maes

ABOUT US ICF EVENTS & WEBINARS ICF PODCASTS ARTICLES ICW EVENTS 2021 CONTACT US

## My events

ADD CHAPTER EVENT & WEBINARS

28 Jul 21	17:00 (Europe/Brussels)	0 / 5	English	test validation CCE #2	MANAGE
28 Jul 21	17:10 (Europe/Brussels)	1 / 5	English	test validation CCE #3	MANAGE
02 Aug 21	14:00 (Europe/Brussels)	0 / 100	Esperanto	isa test	MANAGE
03 Aug 21	11:00 (Europe/Brussels)	0 / 100	English	ttest	MANAGE
26 Aug 21	16:00 (Europe/Brussels)	0 / 500	Dutch	test validation CCE	MANAGE

2.3. Alternatively, you can also access your event manager by clicking on the yellow banner located on the event section page at <https://www.icf-events.org/chapter-events-webinars/>

ICF International Coaching Federation

MY EVENTS LOG OUT

ABOUT US ICF EVENTS & WEBINARS ICF PODCASTS ARTICLES ICW EVENTS 2021 CONTACT US

## ICF Events & Webinars

ICF chapter events and webinars are designed by our engaged volunteer leaders worldwide to inspire, educate and connect the coaching community with clients and the public.

At ICF we believe in coming together to learn from and support each other while we develop bonds and have an unforgettable experience through our local branded events, webinars and conferences.

These life enriching ICF chapter events provide valuable and diverse learning in many

Publish and manage your Chapter event

### 3. CREATE YOUR CHAPTER EVENT

#### 3.1. ACCESS THE ONLINE CREATION FORM

When you have clicked on the button called ADD CHAPTER EVENTS AND WEBINARS in your event manager, an online form will automatically generate for you to fill in.

The screenshot shows the ICF website header with the logo and navigation menu. The main heading is 'Add a chapter event or webinar'. Below it is a form titled 'ORGANIZER' with the following fields:

- FIRST NAME \*: Isabelle
- LAST NAME \*: Maes
- CHAPTER POSITION \*: Chapter position
- EMAIL \*: isabelle.maes@coachingfederation.org

#### 3.2. FILL IN THE EVENT CREATION FORM

Each field in the creation form has an importance for the final design of your event on our ICF platform. This is the reason why many fields on the creation form are mandatory and marked with \*. You will not be able to submit your form until all mandatory fields are completed.

##### 3.2.1. ORGANIZER INFORMATION

The screenshot shows the 'Add a chapter event or webinar' form with the following fields and callouts:

- FIRST NAME \***: Isabelle
- LAST NAME \***: Maes
- CHAPTER POSITION \***: Chapter position
- EMAIL \***: isabelle.maes@coachingfederation.org
- PHONE NUMBER \***: Phone number
- LOCATION OF RESIDENCE \***: ...
- CHAPTER INFORMATION**: Chapter information
- CHAPTER LOGO OR INSPIRATIONAL EVENT PICTURE (LANDSCAPE FORMAT) \***: Choose File No file chosen
- PICTURE #2**: Choose File No file chosen

Callout boxes provide additional information:

- The name of the organizer will not be displayed on the event page but we need this information in our back office to reach out to you in case someone contacts the ICF hotline about your event.
- This information will be displayed under your chapter name/logo on the left column of the event page. See it as an opportunity to present your chapter's mission/vision to the public.
- The email and phone number requested here will be visible to participants. You may want to use a generic email and phone number for them to contact your chapter.
- You can upload up to 2 pictures. We invite you to upload your chapter logo first and then any other event picture you would want to use (not mandatory). If you upload Picture #2, this one will be automatically generate on social media when sharing your event

### 3.2.2. EVENT DETAILS AND REDIRECTION

Make sure to select your local time zone here. The platform will automatically display your event in your local time zone and in the time zone of any participant based on his computer location.

Use the pre-set scroll down menus to make your selection

The screenshot shows the 'EVENT DETAILS' form with the following fields and callouts:

- EVENT TITLE \***: Text input field.
- DESCRIPTION \***: Text area.
- EVENT START DATE \***: Date input field.
- EVENT END DATE \***: Date input field.
- EVENT TIMEZONE \***: Dropdown menu (selected: Brussels (UTC+2)).
- TOTAL EVENT DURATION \***: Hours (00) and Minutes (00) dropdown menus.
- LOCAL TIME EVENT START \***: Time input (00 : 00).
- LOCAL TIME EVENT END**: Time input (- : -).
- CCE UNIT TYPE CORE COMPETENCIES \***: Dropdown menu (selected: 0). Subtext: (training in coaching skills or ethics, or technical coaching skills).
- CCE UNIT TYPE RESOURCE DEVELOPMENT \***: Dropdown menu (selected: 0). Subtext: (personal or business development, other skills and tools useful in the coach's work). A callout points to this field with the text: "Indicate the CCE units per category for your ICW event. If no part of your ICW event is related to ICF Core Competencies, it is considered Resource Development and you can award participants with RD CCE units without ICF approval. If any portion of your event is related to ICF Core Competencies, please submit an application for approval to ICF via: <https://form.jotform.com/30775334564963>".
- EVENT FORMAT \***: Dropdown menu (selected: ...).
- EVENT TYPE \***: Dropdown menu (selected: ...).
- TOPIC \***: Dropdown menu (selected: ...).
- TYPE OF COACHING \***: Dropdown menu (selected: ...).
- LANGUAGE OF EVENT \***: Dropdown menu (selected: ...).

Indicate the CCE units per category for your chapter event.

**0,25 unit = 15 minutes**

If no part of your chapter event is related to ICF Core Competencies, it is considered Resource Development and you can award participants with RD CCE units without ICF approval.

If any portion of your event is related to ICF Core Competencies, **your chapter cannot approve these units and needs to submit an application for approval to ICF** via: <https://form.jotform.com/30775334564963>.

If you indicate CCE units in core competencies when creating your chapter events, these units will be displayed as **"pending approval"** on the event page until the Accreditation department has officially validated them.

CCE units in Resource Development will never show as "pending approval"

Go to page 15 of this tutorial for more details on the CCE validation for your chapter events.



In this part of the form, you can select if your event is a free or a paid event.

if you select **YES**, for a free event, registrants will receive an automatically generated email confirming their full registration to your event and sharing the connection link you provided.

If you select **NO**, you will be invited to fill in more fields about your pricing structure to be displayed on your event page (see example below). In this case, registrants will only pre-register to your event and receive an automatically generated email confirming their pre-registration and informing them about the next steps to follow to finalize their registration. Make sure to explicitly detail these steps in the filled marked as A in the red square below, including registration link etc. This email feature does not apply for chapter events with automatic redirection to external links.

Chapters entering the Stripe programme will get detailed information separately.

**MAXIMUM PARTICIPANTS \***

**FREE EVENT? \***

**ICF CHAPTER \***

**IS SESSION RECORDED? \***

**EVENT SCHEDULE OR OTHER INFORMATION/COMMENTS**

**YOUR EVENT ONLINE PLATFORM LINK (ZOOM, WEBINAR, ..) OR YOUR EXTERNAL REGISTRATION PLATFORM LINK.**

This text field will only be displayed in the confirmation email and reminders sent to participants (not visible on your event page). Be very explicit about what your link(s) are referring to to give participants a maximum of clarity, especially for paid events)



Information added in this section will display in a framed box under the event description and can highlight important information you want to share

If you wish to present your event speakers, click on ADD A SPEAKER and you will be prompted to add their details, picture and bio (see details on page 7)

ADD A SPEAKER

Information typed in this field will be displayed as provided by you in the confirmation email and reminders sent to participants (not visible on your event page). Be very explicit about what your link(s) are referring to so that it gives participants a maximum of clarity. This does not apply for chapter events with automatic redirection to chapter websites

Tick the box here if you do not want to use the event management features of the ICF events platform and wish all your future participants to be redirected to your own chapter platform.

If you want participants to register directly on your chapter website or event registration platform, please check this box and enter below the link where you want participants to be redirected to.  
*Please note that if you choose this option, you will not be able to use our ICF events platform functions for managing your event, communicating with participants and issuing CCE certificates. You will only use this platform as a promotional display of your chapter event with automatic redirection.*

**REGISTRATION LINK \***

\*Mandatory fields

SAVE

Click on save to publish your chapter event in an ICF pre-sent branding. You will get an automatic confirmation email with a link to your event page.

Make sure to indicate an accurate registration link in the mandatory field to ensure a correct redirection of participants.

If you do not tick the box, the event management feature will be automatically activated for your event.

**Extra Fields to fill in for paid events**

**MAXIMUM PARTICIPANTS \***

**FREE EVENT? \***

**CURRENCY \***

**ICF MEMBER PRICE \***

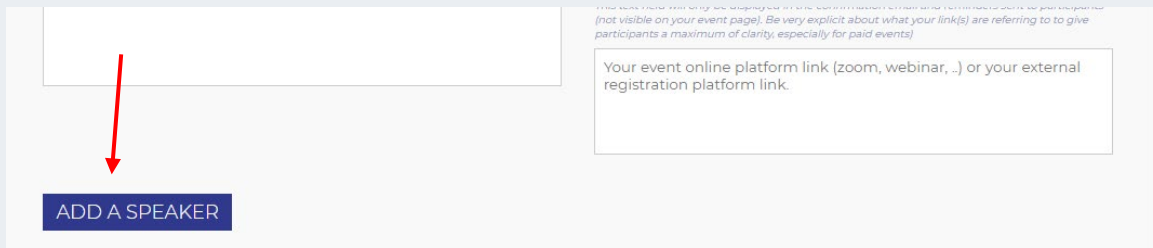
**ICF GLOBAL MEMBER PRICE \***

**NON MEMBER PRICE \***

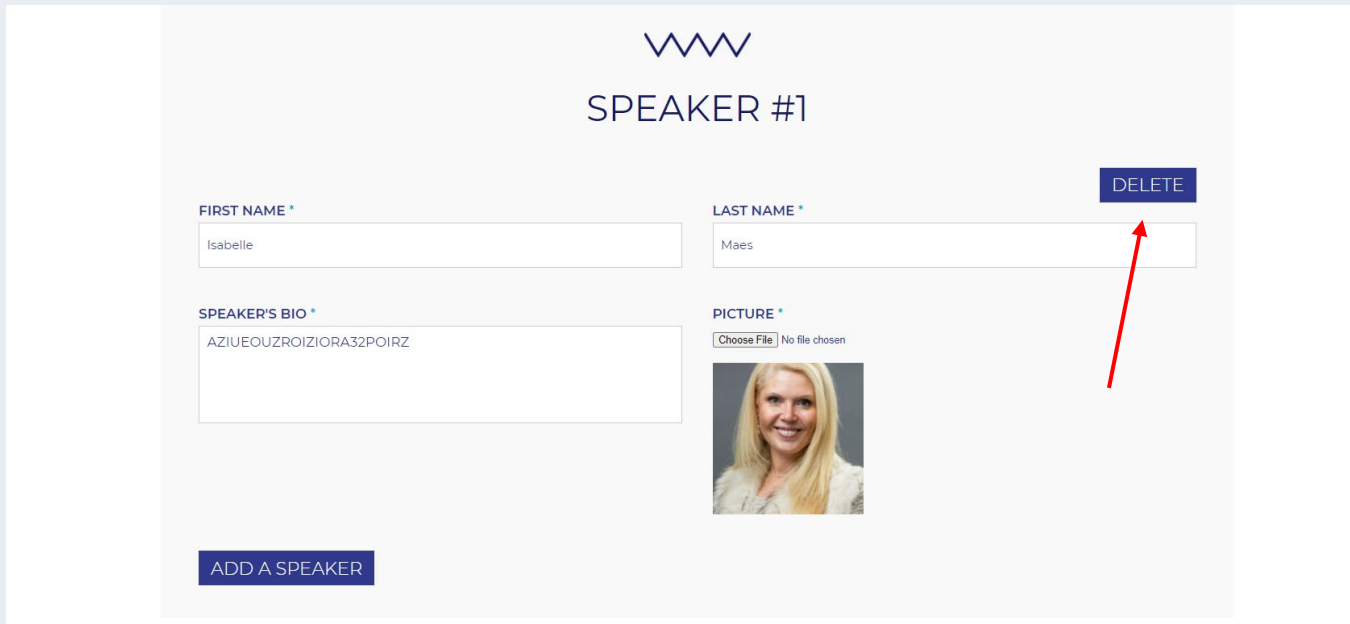
**LINK TO YOUR ONLINE PAYMENT PLATFORM \***

### 3.2.3. ADD SPEAKERS INFORMATION TO YOUR EVENT

If you wish your speakers to be highlighted on your chapter event page, you can activate the option ADD A SPEAKER on the event creation form.

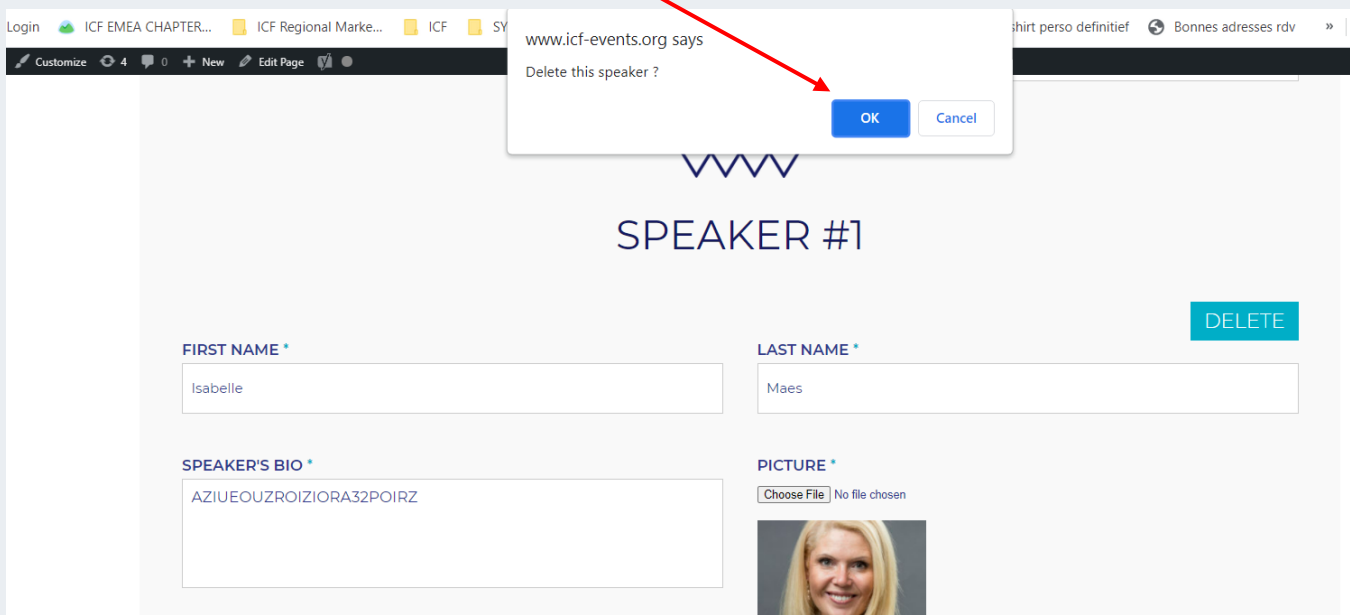


When clicking on this button, another section will open up for you to fill in for each speaker.



You can add as many speakers as wished by hitting the button ADD A SPEAKER on and on again. All speakers will appear in order of creation in the left column of your event page.

If you wish to delete a speaker you can hit the button DELETE and you will be prompted to confirm this action in a separate pop-up window.



## 4. MANAGE AND EDIT YOUR CHAPTER EVENT

Your event is now created and available in your personal event manager.

!!! Please be aware that this event will be linked with your personal ID and password used to connect to the platform and will not display to other leaders of your chapter.

If several persons within your chapter are handling events or if you work with an external admin that is not a chapter leader and cannot be recognized by our platform API, do send us a request to get a unique ID and password at <https://form.jotform.com/212303180405137>

You can access your event manager by:

- Option 1: click on the upper right button MY EVENTS
- Option 2: click manage on your event page (under the event upper information)

The screenshot displays the ICF website interface. At the top right, the 'MY EVENTS' button is circled in red and labeled 'Option 1'. Below the main navigation, a banner for 'ENJOY GREAT LEARNING.' is visible. The main content area shows an event page for 'The importance of becoming an ICF member (Test event for tutorial)'. The 'Manage' button on this page is circled in red and labeled 'Option 2'. The event details include: Organizer: ICF United Kingdom; Event Time: 12 Aug 21, 09:00 (Europe/London); Your Time Zone: 10:00 (Europe/Berlin); English; 2 hours; Event type: Other; Topic: Professional development; Free Event; Maximum Participants: 100; Remaining: 100; Type of Coaching: ICF Core Competencies & Coaching Skills; CCE Units by Type: CC: Pending Approval, RD: 0. A 'Register' button is also present.



Preview of Option 1: click on MY EVENTS

By using this option, you will see your event manager appear with the list of all your organised events + the button “add chapter events & webinars” to create new events.

To edit/manage your event, simply click on the button manage and you will see another screen appearing (see details below in preview of option 2)

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## My events

ADD CHAPTER EVENT & WEBINARS

DATE	EVENT TIME	PARTICIPANTS	LANGUAGE	TITLE	
12 Aug 21	09:00 (Europe/London)	1 / 100	English	The importance of becoming an ICF member (Test event for tutorial)	MANAGE

Preview of Option 2: click on MANAGE directly on the event page

By using this option, you will see several options appearing related to your event.

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## Manage your event

### The importance of becoming an ICF member (Test event for tutorial)

VIEW EVENT EDIT EVENT CANCEL EVENT EXPORT PARTICIPANTS (PDF) EXPORT PARTICIPANTS (XLS) < BACK TO MY EVENTS

Registrations (1 / 100)

CIVILITY	FIRST NAME	LAST NAME	EMAIL	COMPANY	TITLE	PHONE	ACTIONS
Mrs	Isabelle	Maes	isabelle.maes@coachingfederat ion.org	SK Productions	Regional Development Team	04712070 81	CANCEL REGISTRATION

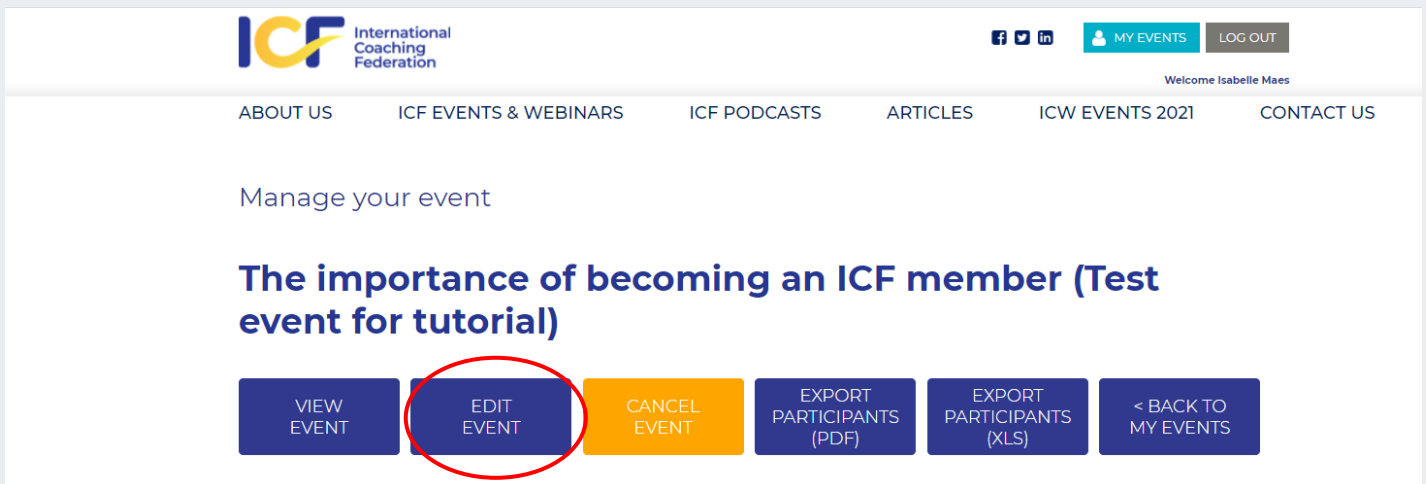
#### 4.1. VIEW EVENT



The screenshot shows the ICF website's event management interface. At the top left is the ICF logo (International Coaching Federation). To the right are social media icons (Facebook, Twitter, LinkedIn) and buttons for 'MY EVENTS' and 'LOG OUT'. Below the header is a navigation menu with links: 'ABOUT US', 'ICF EVENTS & WEBINARS', 'ICF PODCASTS', 'ARTICLES', 'ICW EVENTS 2021', and 'CONTACT US'. The main content area starts with 'Manage your event' and a title: 'The importance of becoming an ICF member (Test event for tutorial)'. Below the title is a row of six buttons: 'VIEW EVENT' (circled in red), 'EDIT EVENT', 'CANCEL EVENT', 'EXPORT PARTICIPANTS (PDF)', 'EXPORT PARTICIPANTS (XLS)', and '< BACK TO MY EVENTS'.

By clicking on the VIEW EVENT button, your event page will display as it will appear to the public and potential participants. Make sure to check that you haven't forgotten anything before starting your event promotion. This is also the right place for you to get access to the permalink and shareable links of your event for social media, your chapter website, etc.

#### 4.2. EDIT EVENT



This screenshot is identical to the one above, showing the same ICF event management interface. However, in this version, the 'EDIT EVENT' button is circled in red, indicating the action to be taken.

Clicking on the EDIT EVENT button will bring you back to the original event creation form and enable you to change anything you want on your event information.

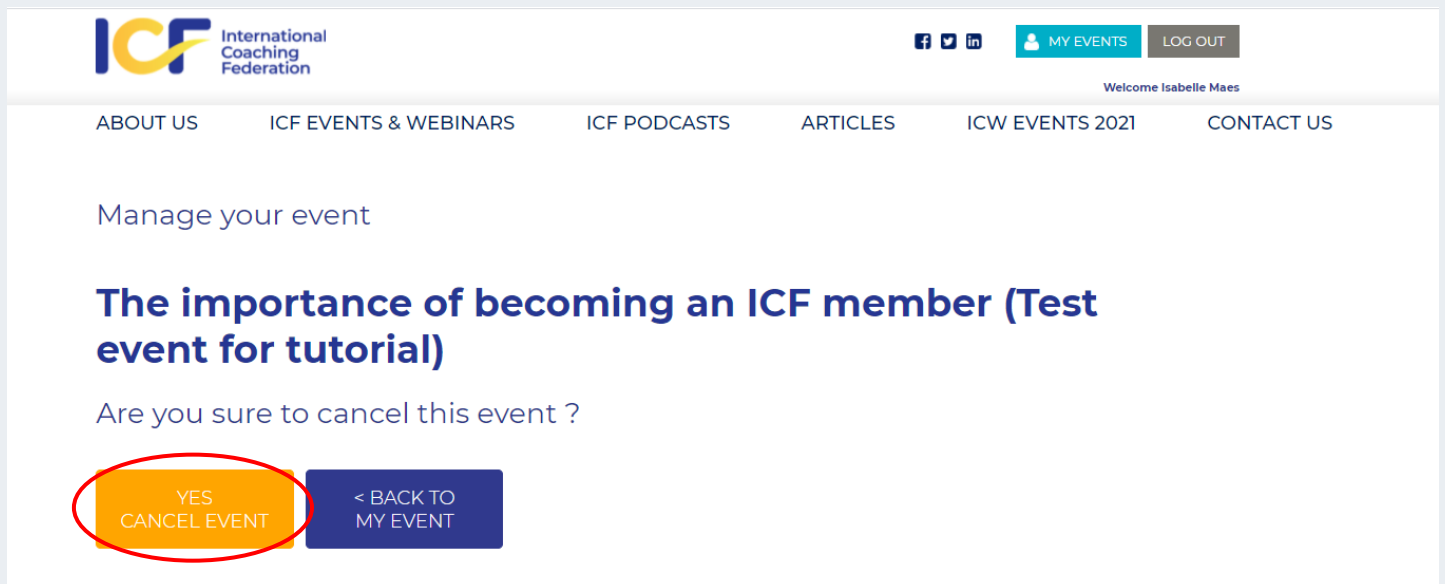
**!!!! If you make any major change to your event like date, time, price or registration link, registered participants will automatically get a notification of these changes by email.**

(This option is not applicable for chapters using the redirection feature since no one will be able to register to the event on our IFC platform)

### 4.3. CANCEL EVENT



For security reasons, if you click on cancel event, you will be redirected to another page, where you will have to reconfirm that you are willing to cancel the event.



**!!! As soon as you hit “YES CANCEL EVENT”, an automatically generated email will be sent to all registered participants informing them about the event cancellation** (not applicable for chapters using the redirection feature)

Once you have confirmed the event cancellation here, you will not be able to go backwards anymore and reinstate your event.

Your event will also automatically disappear from the calendar.


#### **4.4. ACCESS YOUR EVENT PARTICIPANTS LIST**

This option is only available to chapters using the events platform as an event management platform and enabling participants registrations.

As soon as the first participants register, you will have the options to export your participants list in Excel or PDF as you prefer. Keep in mind that these lists need to be used by your chapter in compliance with GDPR / Data protection policies.

You also have an option to cancel someone's registration at any time.

Please note if you do cancel someone's participation, the participant will receive an automatic notification of cancellation of his/her participation. This option can be useful for paid events when preregistered participants do not complete their payment in due time before the event.



The screenshot displays a navigation bar with buttons: VIEW EVENT, EDIT EVENT, CANCEL EVENT, EXPORT PARTICIPANTS (PDF), EXPORT PARTICIPANTS (XLS), and < BACK TO MY EVENTS. The PDF and XLS buttons are circled in red. Below the navigation bar, the text 'Registrations (20 / 500)' is shown. A table lists registrations with columns: CIVILITY, FIRST NAME, LAST NAME, EMAIL, COMPANY, TITLE, PHONE, and ACTIONS. A red arrow points to the 'ACTIONS' column. The table contains four rows of registration data, each with a 'CANCEL REGISTRATION' button.

CIVILITY	FIRST NAME	LAST NAME	EMAIL	COMPANY	TITLE	PHONE	ACTIONS
Mr	Aref	AlMubarak	[REDACTED]	[REDACTED]	[REDACTED]	14	CANCEL REGISTRATION
Ms	Ghaya	Barwani	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	CANCEL REGISTRATION
Prefer not to	Anik	Clemens	[REDACTED]	[REDACTED]	[REDACTED]	22	CANCEL REGISTRATION
Ms	Lina	El assaad	[REDACTED]	[REDACTED]	[REDACTED]	3	CANCEL REGISTRATION

If you wish to sort and play with your participants list, we recommend you to export your participants list in Excel format and to add some filters on each columns.

While the platform will send some reminders to participants on D-1 and H-2, reminding them of the information you will have filled in in your event creation form, feel free to use these lists to also reach out to participants directly.

Participants list are updated in real time.

#### 4.5. UNLOCK CEE CERTIFICATES FOR YOUR EVENT

This option is only available to chapters using the event management mode of the events platform.

Within 24 hours after your event happened, the events platform will automatically unlock a new feature to validate participation of your registrants and automatically send them personalised CCE certificates for your event with the right ICF branding and information.

To enable these certificates to be sent by email to your participants, you will need to validate their presence by ticking the box in front of their names in your event manager. This box is visible under the left column called PRESENT.

Once you have ticked all the names of participants, click on SAVE ACTIVE PARTICIPANTS and this will unlock the sending of certificates. You can save your participants list only once on the events platform.

!!!! Make sure to **only validate people who effectively attended your event** as CCEU certificates can only be granted to the ones who participated live in the event. For the ones listening to the recording after the event, no certificate will be delivered but they will be able to log this as self-study hours. These will always count for Resource Development units.

!!!! This validation feature will only be available after validation of your CCEU's by the ICF accreditation department (This applies only for CCE in Core Competencies. No validation is requested for CCE in RD). As long as your CCE's in Core Competencies are not validated by the ICF accreditation department, the column Present will not be accessible. Make sure to request your CCE validation on time by filling in this Jotform: <https://form.jotform.com/30775334564963>.

The screenshot displays the event management interface. At the top, there are five navigation buttons: 'VIEW EVENT', 'EDIT EVENT', 'EXPORT PARTICIPANTS (PDF)', 'EXPORT PARTICIPANTS (XLS)', and '< BACK TO MY EVENTS'. Below these is the section 'Registrations (1 / 5)'. A table lists participant details with columns: PRESENT, CIVILITY, FIRST NAME, LAST NAME, EMAIL, COMPANY, TITLE, PHONE, and ACTIONS. The 'PRESENT' column for the first participant has a red circle around an empty checkbox. The 'ACTIONS' column has a 'CANCEL REGISTRATION' button. Below the table, a greyed-out button 'SAVE ACTIVE PARTICIPANTS' is circled in red. The interface also includes sections for 'Event slides or recording' with an 'UPLOAD' button and a 'Link' section with a text input field and a 'SAVE' button.

PRESENT	CIVILITY	FIRST NAME	LAST NAME	EMAIL	COMPANY	TITLE	PHONE	ACTIONS
<input type="checkbox"/>	Mr	MAxime	Kaepelin	maxime@adgensite.com	ADgensite	Chef	0632380005	CANCEL REGISTRATION

## 4.6. UPLOAD YOUR EVENT RECORDING/SLIDE DECKS

This option is only available to chapters using the events platform as an event registration platform.

Within 24 hours after your event happened, the events platform will automatically unlock a new feature to upload your event recording and slide decks.

This will appear on the front page of your event, which means you will still be able to share them with participants via the event page, even after the event.

Accepted files are PDF, MP3 or MP4.

For your event recordings, we recommend you to use online links as these can become very quickly heavy and unmanageable for direct upload on our event platform.

Zoom meetings can be recorded on Zoom cloud, other platform like Vimeo or YouTube can be very effective too in managing the size of your recordings.

The screenshot displays the event management interface. At the top, there are five navigation buttons: 'VIEW EVENT', 'EDIT EVENT', 'EXPORT PARTICIPANTS (PDF)', 'EXPORT PARTICIPANTS (XLS)', and '< BACK TO MY EVENTS'. Below these is the 'Registrations (1 / 5)' section, which contains a table with columns: PRESENT, CIVILITY, FIRST NAME, LAST NAME, EMAIL, COMPANY, TITLE, PHONE, and ACTIONS. The table has one row for a participant named Maxime Kaepelin. Below the table, there is a 'SAVE ACTIVE PARTICIPANTS' button. The 'Event slides or recording' section follows, with a red arrow pointing to the 'Add a new file (PDF, MP3 or MP4)' text. Below this is a file upload area with a 'Choose File' button, the text 'No file chosen', and an 'UPLOAD' button. The 'Link' section has a text input field and a 'SAVE' button, which is circled in red.

VIEW EVENT   EDIT EVENT   EXPORT PARTICIPANTS (PDF)   EXPORT PARTICIPANTS (XLS)   < BACK TO MY EVENTS

Registrations (1 / 5)

PRESENT	CIVILITY	FIRST NAME	LAST NAME	EMAIL	COMPANY	TITLE	PHONE	ACTIONS
<input type="checkbox"/>	Mr	MAxime	Kaepelin	maxime@adgensite.com	ADgensite	Chef	0632380005	CANCEL REGISTRATION

Please check the active participants in your event and click on the button below :

SAVE ACTIVE PARTICIPANTS

Event slides or recording

Add a new file (PDF, MP3 or MP4)

To convert your recording to the right format you can use online converters of the type: <https://audioonline-convert.com>

Choose File No file chosen   **UPLOAD**

Link

Add here the URL link to access your online recordings from Zoom, YouTube, Vimeo, etc.

**SAVE**



## 5. CCE validation for Core competencies units (CC)

To guarantee the needed security around the CCE validation and sending of certificates, we count on your partnership to follow the outlined process and to not forget to request validation for your chapter events.

If no part of your chapter event is related to ICF Core Competencies, it is considered Resource Development and you can award participants with CCE units in Resource Development without ICF approval. This means that if you select RD when creating your chapter event online, no validation from the accreditation department will be needed and the information on the number of units will automatically display on your event page.

If any portion of your event is related to ICF Core Competencies, you will have to submit an application for approval to ICF Accreditation using a Jotform available at : <https://form.jotform.com/30775334564963>.

If you indicate CCE units in core competencies (CC) when creating your chapter event, these CC units will display as “**pending approval**” on your chapter event page until the Accreditation department has validated them. Once they are validated, you will get a confirmation email of the validation and the “pending approval” mention will disappear on your event page to be replaced by the validated number of CC units.

As long as your CCEU’s in core competencies are not validated, the pending approval mention will remain and you will not be able to send out automatically generated CCEU certificates from the event platform (this feature is not available for chapter events with redirection).

The CCE validation process applies to all chapter events no matter if they use the event management or the redirection mode./

## 6. Share your chapter event on social media and chapter website

Once your chapter event is created and appears on our events calendar, it will generate automatic shortcuts to Linked In, Facebook and Twitter.

To activate these shortcuts, please click on the dedicated icons (see red marks below).

For any other social media platform, simply copy the permalink in your browser bar and paste it wherever needed.

The screenshot displays an event page with the following elements:

- Organizer:** ICF United Kingdom Charter Chapter. Includes a logo and a description: "The UK Chapter was the first ICF Chapter to be established by members outside of North America and we remain the largest, most active and influential chapter." Contact info: isabelle.maes@coachingfederation.org, +32471207081, UNITED KINGDOM.
- Event Details:**
  - Date: 12 Aug 21
  - Event Time: 09:00 (Europe/London)
  - Your Time Zone: 10:00 (Europe/Brussels)
  - Language: English
  - Duration: 2 hours
- Event Type:** Online Event
- Event type:** Other
- Topic:** Professional development
- Price:** Free Event
- Buttons:** "Manage" and "The importance of becoming an ICF member (Test)"
- Social Media:** Facebook, Twitter, and LinkedIn icons are circled in red in the top right corner.

## 7. USE STRIPE TO COLLECT PAYMENTS FOR YOUR CHAPTER EVENTS

The ICF events platform is now able to offer payment features for chapters using the events platform as a registration management platform. This feature does not apply for chapters using the redirection mode.

### 7.1. FIND OUT IF STRIPE IS AVAILABLE IN YOUR COUNTRY

To know if Stripe is active in your country, click on the following link: <https://stripe.com/global>

As Stripe is in constant evolution, in case it is not yet available in your country, you have an option to share your email address to receive updates from them about your country.

### 7.2. WHICH CURRENCIES ARE SUPPORTED BY STRIPE?

Stripe supports processing payments in 135+ currencies, allowing you to charge customers in their native currency while receiving funds in yours. See more information at <https://stripe.com/docs/currencies>

### 7.3. WHICH PAYMENTS CARD DOES STRIPE ACCEPT?

Although it is dependent on location, in general Stripe accepts major cards including:

- VISA.
- VISA Debit.
- MasterCard.
- Discover.
- JCB.
- American Express.

Stripe also supports a range of additional [payment methods](#), depending on the [country of your Stripe account](#).

### 7.4. HOW TO CREATE A STRIPE ACCOUNT FOR YOUR CHAPTER?

By default, Stripe allows international VISA and MASTERCARD cards.

For businesses based in specific countries, Stripe even supports a number of other online payment methods. The fees for each payment method, evaluated by successful payment, are shown here : <https://stripe.com/pricing>

There are no additional gateway fees or hidden charges.

Please follow the steps below and watch the useful video's that will help you create and manage your chapter Stripe account.

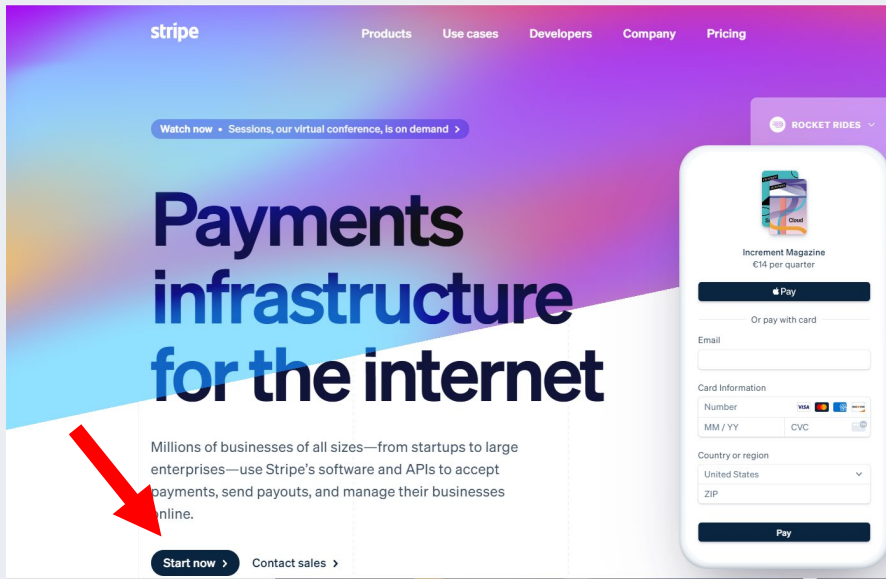
### 7.5. VERIFICATION REQUIREMENTS

If you are creating a Stripe account for the first time, you'll find it helpful to know what Stripe needs to verify and activate your account. This information is required by regulators and helps prevent abuses in the financial system. Each country has its own set of regulations, and knowing beforehand what documentation you will have to submit during the account creation process will help you get online and open for business quickly and smoothly.

More information can be found here : <https://youtu.be/qLoWEaGpzNc>

## 7.6. CREATE OR CONNECT YOUR CHAPTER STRIPE ACCOUNT

Go to [www.stripe.com](https://www.stripe.com) and click on 'START NOW'



You can also follow the steps as explained in their tutorial video here : <https://youtu.be/u9YcbWDioC4>

## 7.7. VERIFICATION FOLLOW-UPS

Once you've created or connected your chapter account, Stripe will verify your business information and approve your account, usually within a few minutes after submission. If your business information cannot be verified successfully, you will be informed both by email and in your Stripe Dashboard.

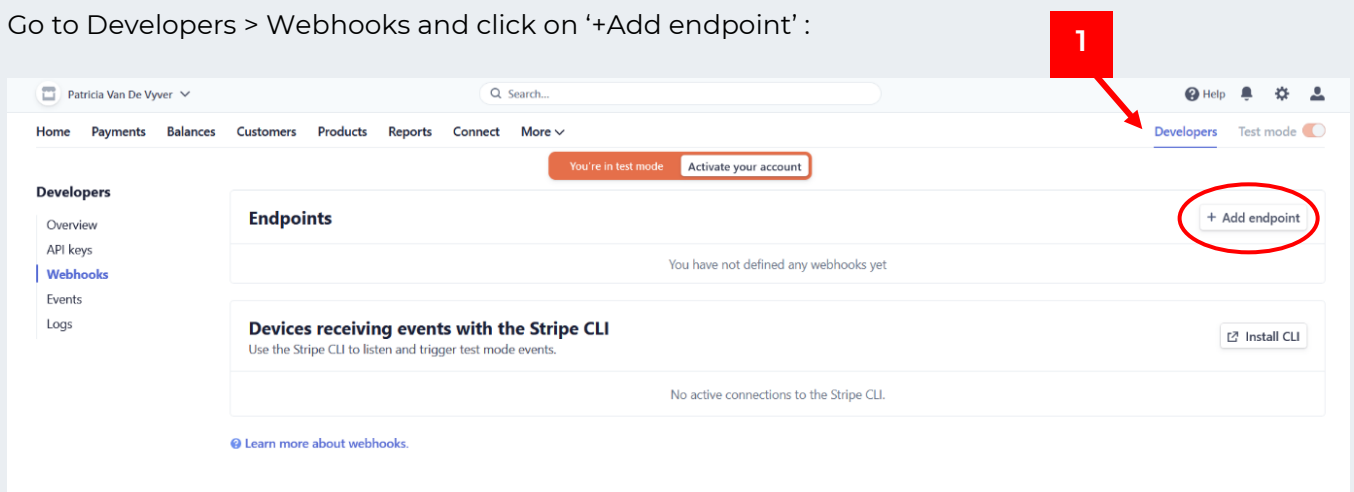
This video demonstrates how to check your verification status and how to respond to further requests for information: <https://youtu.be/hmKdZVhDk7I>

## 7.8. ADD A WEBHOOK ENDPOINT IN YOUR STRIPE ACCOUNT

When your account is approved, you will and you will need to add a webhook endpoint in your Stripe account to enable our developers to link your stripe account with the ICF events platform. We will need to do this manually for each chapter wishing to use this payment feature.

Follow the steps below to add a webhook endpoint :

1. Go to Developers > Webhooks and click on '+Add endpoint' :

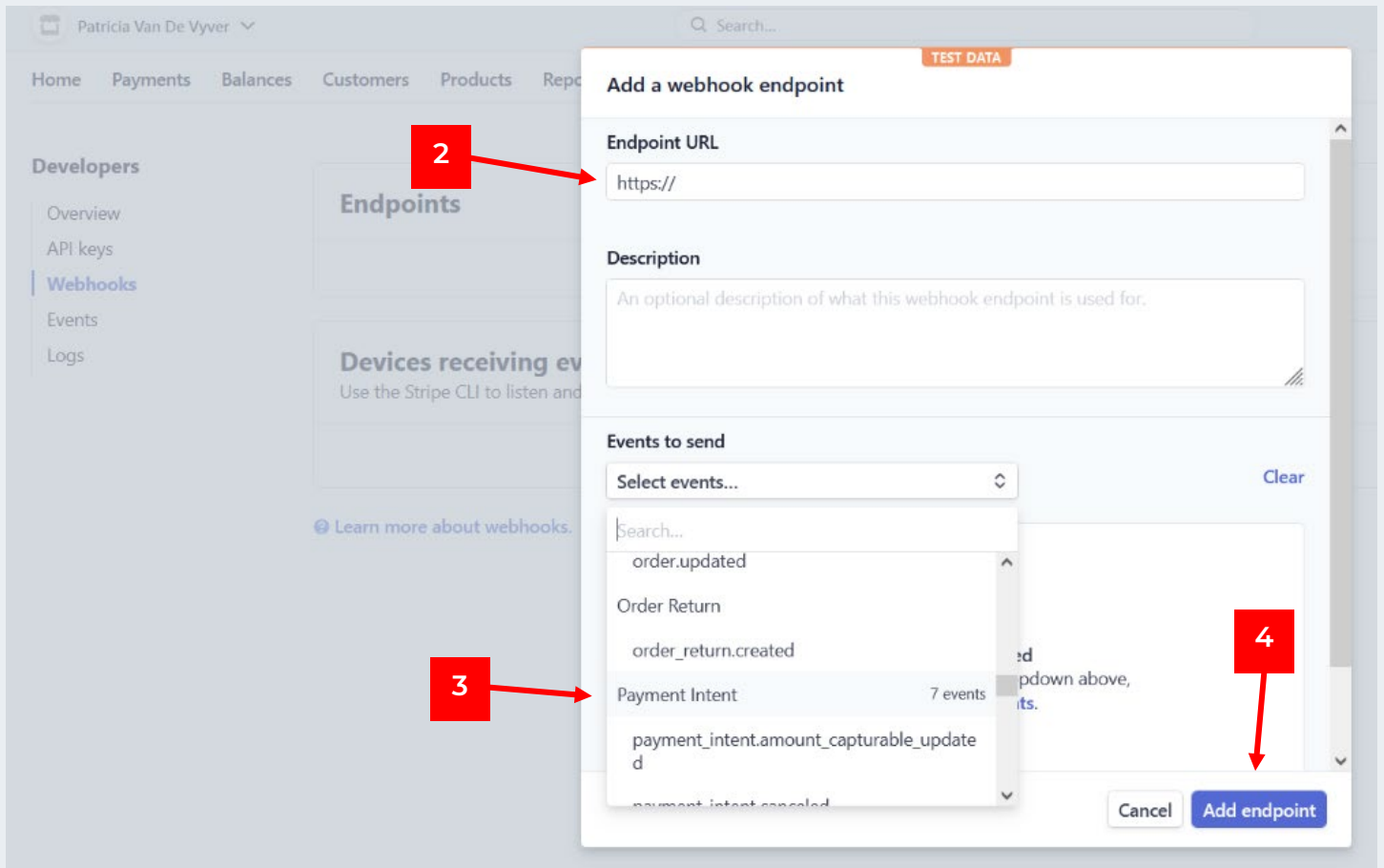


2. Copy and paste the following URL in the field 'Endpoint URL':

[https://www.icf-events.org/?wc-api=wc\\_stripe](https://www.icf-events.org/?wc-api=wc_stripe)

3. In the field 'Events to send' **select 'Payment Intent'** – several payment intent lines will appear

4. Finish by clicking on the blue button '**Add endpoint**'



## **7.9. LINK YOUR CHAPTER STRIPE ACCOUNT TO THE ICF EVENTS PLATFORM**

Once your account is successfully created our developers will work behind the scenes to connect your Stripe account with our ICF Events Platform, so that it recognizes it each time you will connect to the ICF events platform.

**To enable this development, we will need you to fill in the following Jotform with all necessary information requested and submit it to us:**

<https://form.jotform.com/212272086287155>

We will treat the forms in the order of receipt.

In this form you will be asked for several information including the Publishable API Key and the Secret API keys.



### **7.13. PAYMENTS AND PAYOUTS**

Learn how to view all your customer transactions and the status of every payment on your account, how to find specific transactions using Stripe's default filters and how to create custom filters for your own needs.

**And how to export transactions :**

<https://youtu.be/BIApWv2Pfw4>

### **7.14. CURRENCY CONVERSIONS**

With Stripe, you can accept payments in over 135 countries using a wide range of payment methods :

<https://stripe.com/docs/currencies>

Learn how currency conversion works on Stripe, how Stripe treats currency balances and payouts, and how to avoid unnecessary exchange fees when handling multiple currencies :

[https://youtu.be/\\_PmkkHFdL7U](https://youtu.be/_PmkkHFdL7U)

Learn even more about how Stripe handles currency conversions for you:

<https://stripe.com/docs/currencies/conversions>

### **7.15. PAYOUTS IN THE STRIPE DASHBOARD**

In order to receive funds, Stripe (or your platform) makes payouts to your bank account.

How quickly you receive a payout and the availability of your funds depends on numerous factors, including the industry and country you're operating in, and the risks and regulations that govern that industry and country.

Find your payouts and payout status in the Stripe Dashboard and how to read payout details here :

<https://youtu.be/2HrSuVTvxS0>

### **7.16. PAYOUTS TYPES AND SCHEDULES**

Learn how to review and set your payout schedule, and how to choose between automatic payouts, manual payouts, and instant payouts here : <https://youtu.be/ZE8hZG3h2-4>

### **7.17. PAYOUT FAILURES AND DELAYS**

Find how to troubleshoot payout failures and delays and what are the common reasons for payout failures and delays including account verification issues, funds being held in reserve, and bank routing issues, here :

<https://youtu.be/ztkBknknEIY>



## 7.18. **FINANCIAL REPORTS**

Stripe's financial reports will help you with your accounting and reconciliation and help you understand your account balance at every step of the payments lifecycle.

There are 3 types of reports available in Stripe :

- ✓ **Financial reports :** how to find financial reports in the Stripe Dashboard and what each section of the reports represent, including balance reports and payout reconciliation reports. It also delineates how and when your financial data becomes available : <https://youtu.be/Y0rA4p7kpG0>
- ✓ **Dashboard exports :** The Stripe Dashboard includes filter and export options if you're looking to download a CSV file of your payments transactions : <https://youtu.be/WIO4pqd1ISY>
- ✓ **Stripe Sigma :** Stripe Sigma makes all your transactional data available as an interactive SQL environment right in your Stripe Dashboard. You can write custom queries or browse our collection of pre-configured reports that surface common questions and queries which you can use as a starting point for further analysis. Sigma allows you to view the query results directly in your browser, download them in CSV format for use in spreadsheets and other applications. You can also schedule and automate your reporting with scheduled queries. <https://youtu.be/wFUNmJM5SQw>

## 7.19. **FRAUD AND DISPUTES**

If you accept credit cards on your chapter events, you'll most likely have to handle chargebacks or inquiries. When a customer has an issue with a credit card charge, they can dispute it with their bank. The bank will initiate a dispute with either an inquiry or a chargeback.

Learn what these terms mean, how they differ, and how banks and other payment systems initiate disputes: <https://support.stripe.com/questions/getting-started-with-stripe-fraud-and-disputes>

## 8. ICF EVENTS PLATFORM SUPPORT TEAM

If you need any support on how to use our ICF events platform and maximize its numerous features, feel free to reach out to [icfpr@coachingfederation.org](mailto:icfpr@coachingfederation.org) or to contact your regional development manager.

We wish you a lot of success and fun in using our new ICF digital events platform to promote your ICF chapter events.

## 9. FREQUENTLY ASKED QUESTIONS

### 1. When do participants receive automatically generated emails?

This feature is only available for chapter events using the event management mode with a distinction between free and paid events.

- **For free events or paid events using the embedded Stripe feature**, participants will be able to register fully on the ICF events platform. These participants will receive a confirmation email at the moment they register and 2 reminder emails (event day -1, event hour -2). After the event, participants will receive a thank you email with a link to upload their CCE certificate once the chapter will have validated the active participants in its event manager.
- **For paid events where no Stripe account is linked and another registration platform is used outside of the ICF events platform**, participants will be able to pre-register and get an automatically generate pre-registration email with the needed steps to follow to fulfill their registration. The chapter will then take it from there and ensure the final confirmation and the reminders to the participant. After the event, participants will receive a thank you email with a link to upload their CCE certificate once the chapter will have validated the active participants in its event manager.
- Participants will also receive an automatically generated email whenever some **major changes are brought to the event** (date, time, price or registration link) or if the event is cancelled by the organizer.

### 2. What are the best sizes/proportions/format for the Logo/event picture to upload in this section?

The platform will always adapt as good as possible to the picture you provide no matter the size of format, but to have the best possible result, we recommend you to use pictures and logo in horizontal rectangle or square format.

### 3. Is it needed for chapters to get confirmation from ICF before being able to post a chapter event and enter the CCE data?

No, the good news is that you can already create your chapter event on the ICF events platform to start promoting it much faster than ever before.

As soon as you fill in the creation form, your event will be generated in real time and the promotion on your end can start while participants can already register.

Of course this speed of action does not prevent you to request a CCE validation from ICF on time if any portion of your event is related to ICF Core Competencies.

The link to submit your application for approval is <https://form.jotform.com/30775334564963>.

- If you indicate CCE units in core competencies (CC) when creating your chapter event, these CC units will display as **“pending approval”** on your chapter event page until the Accreditation department has validated them. Once they are validated, you will get a confirmation email of the validation and the “pending approval” mention will disappear on your event page to be replaced by the validated number of CC units.
- If no part of your chapter event is related to ICF Core Competencies, it is considered Resource Development and you can award participants with CCE units in Resource Development without ICF approval. This means that if you select RD in the CCE fields when creating your chapter event online, no validation from the accreditation department will be needed and the information on the number of units will automatically display correctly on your event page.

**4. Does the platform provide a calendar event for the fully registered participants to save in their calendar?**

Yes, in the automatically generated email sent to participants to confirm their registration, they will receive all information you provided in your registration form as well as an **iCalendar link** to add all event details in their personal calendar.

An iCalendar link, often shortened to “an **iCal**”, is a link to another calendar. iCal is an open standard for exchanging calendar and scheduling information between users and computers. It's supported by almost every calendaring program you're ever likely to use.

In clear, when getting their confirmation email, participants will be able to save all information about the event directly in their calendar by clicking on the iCal link provided in their confirmation email and reminders.

**5. Management of events would be better with one Chapter log in. I can only access the events that I create and not the events that other directors create. Would it be possible to create a 'Chapter' email log in?**

Yes, if needed, your chapter can request a unique ID and password to log into the ICF events platform. This request needs to happen officially through the following Jotform link:

**<https://form.jotform.com/212303180405137>**

Please do request this unique ID well in advance of your event as it will need some time for us to process in the back office. Requests will be treated in the order of receipt.

The login process will be different if you use this unique ID option, but we will make sure to send you all detailed information by email together with your new ID and password.

**6. When linking the Stripe option to a chapter, will it be linked via the registration email?**

Chapters requesting the Stripe account feature will automatically get a dedicated and unique ID and password to create their chapter events. In case you do request the Stripe account option, you may ignore the jotform request outlined in point 5. Above.

**7. How can we learn whether Stripe is active in our country or not?**

To know if Stripe is active in your country, click on the following link: <https://stripe.com/global>

As Stripe is in constant evolution, in case it is not yet available in your country, you have an option to share your email address to receive updates on their implementation in your country.

Since the ICF events platform is also in constant evolution, please note that we exploring ways to also add Paypal as a second payment option for chapters where Stripe is not available yet.

We will inform you as soon as this option is implemented and available.

Thank you for your patience as we are working on this.