COLUMBIA *alumni* | ASSOCIATION | CAA

The CAA has prepared the following manual with instructions on creating a Zoom registration page. Capturing data through Zoom registration pages will help us track of alumni engagement trends across your communities.

Zoom Account:

- Please use a dedicated club/SIG account or the CAA's shared Pro account
  Pro accounts have unlimited meeting length for up to **300 participants.**
    For instructions on how to request access to the Columbia Leaders Zoom Account, please review the [CAA Zoom Protocols](#) and reach out to your CAA liaison

Enabling and creating a registration page for a meeting:

- Sign into the Zoom web portal with the **Columbia credentials provided by the CAA**
- In the navigation menu, **click Meetings**
- Schedule a **New Meeting (name it)** or **edit** an existing meeting
- In the **Registration section**, make sure to **select** the **Required check** box to collect information
- After scheduling the meeting, the Registration and Branding tabs will appear

Manage attendees:

- **Click View** to see a list of people that have registered for the meeting
- Click the registrant's name for additional info of that person

Customizing registration options:

After you schedule the meeting, you can customize registration options by:
- Clicking the Registration tab
- Clicking Edit in the Registration Options section

Customize these options:

Steps: Registration Tab
- Automatic Approval: Anyone who signs up will receive information on how to join
- Manual Approval: Anyone who signs up will need to be approved by the host on the meeting management page. See image:

- Send an email to host when someone registers:
  - ❖ Check this option if you want to receive an email when someone registers for your webinar. Attendees will receive an email when you approve their registration
- Close registration after event date:
  - ❖ Check this option if you want to prevent anyone from registering after the webinar date and projected end time. Attendees can still register on the event date and once the webinar starts, as long as it is before the projected end time of the webinar. For example, if you schedule a webinar for 9AM with a duration of 2 hours, the registration will close at 11AM

Note: *If you enable this setting and make your webinar available on-demand, people can use the original registration link to register for the on-demand webinar recording*

- Allow attendees to join from multiple devices:
  - ❖ Check this option to allow webinar attendees to be able to join from multiple devices, such as computers and phones.
- Show social share buttons on the registration page:
  - ❖ Provides buttons to share the registration page to Facebook, Twitter, LinkedIn, or email

Steps: Questions Tab

Add Registration Fields:
  You should customize the question fields that appear in your registration page:
  - ❖ Click the Questions tab- **always** ask for **first/last name** and make these required fields. If you are inviting people outside of your region then the **region** field must be required
  - ❖ Click the Custom Questions tab-**always** ask for **UNI** and **email**

Note: *Under UNI, provide the link _____ for alumni to search for it if unknown. Since this is a required field, you can add "(Write N/A if you don't know and are unable to locate your UNI)"*

❖ Under the Custom Questions tab click New Question to request **school/class/year**, and add "(Write N/A if not applicable)"

❖ Click "New Question" to request affiliation with options (Alumni/ Faculty/ Friend/Student/ Staff.) See image:

Type	○ Short Answer ● Single answer
Required	☑
Question	Affiliation
Answer	Alumni
	Faculty
	Friend
	Student
	Staff
	Add another answer

Create Cancel

❖ Check the Field(s) you would like to include on your registration page. We recommend adding the field **"Do you have any questions you would like to ask?"**

❖ Check the "Required box" to make that field required with the exception of UNI

❖ Click "Save All"

Note: *Name and email address are always required. Some fields like Country/Region and State/Province will appear as drop-down menus for attendees. Customizing Branding*

Example: