



# One Time Events Procedure for Accepting Credit Card Payments

Exware is Financial Services’ software solution to help meet the needs for one-time events or annual events, such as conferences, where Queen’s University business units would like to accept credit card payments.

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## Advantages of Exware:

- [https://www.exware.com/solutions/event\\_management/](https://www.exware.com/solutions/event_management/)
- Free for free events
- Offers multiple ticket options (early bird pricing option, VIP tickets, promo codes)
- Accept credit and Visa/Mastercard debit card payments through a secure PCI compliant payment processor.
- Send automated email notifications to registrants, event updates or reminders.
- Track registrations, payments, and refunds with the ability to create ad hoc reports.
- <https://support.exware.com/>
- No additional work or costs needed for the business unit to set up a PCI compliant solution - Exware is a Queen’s University approved service provider.
- Timely settlement of money to your account – recorded, at the end of the month, to the chartfields provided by the department.

## Determining if Exware is Right for You:

The use of Exware may be right for you in following situations:

- One-time events or conferences where fees are collected in advance.
- Annual events or conferences where fees are collected in advance.
- Non-profit or charity events where the business unit is not earning revenue.
- One-time workshops.
- One-time training courses and/or sessions.



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Exware is **NOT** appropriate for the following situations:

- Events or conferences where fees are collected onsite or at the door.
- Where the business unit is looking to create an ongoing revenue stream.
- Any form of tuition collection.
- Camp registration:
  - If you need this service, please reach out to the [PCI Compliance Officer](#) for assistance – CampBrain is the current approved solution for camp registration.
- Recurring registration fees.
- Donations

**Note: Exware is not suitable for collecting medical or personal health information.**

If you have any remaining questions or are still unsure if Exware is the right solution for you, please contact the [PCI Compliance Officer](#) to discuss.

## Steps to Request and Receive Approval to Use Exware:

### 1. Submit Request

- Fill out the [request form](#) found on the Financial Services website.
- This will route to General Accounting staff for review and approval.

### 2. Approval and Authorization to Use Exware

- The General Accounting staff will review the request form and supporting documentation.
- Once approved the General Accounting team will create your Exware account and you will receive an email with login instructions.
  1. This will be done within 5 business days of receiving the documents
  2. The General Accounting team will email instructions for creating your event in Exware.
- If the request is denied, General Accounting staff will advise the business unit of the decision and the process terminates here.

### 3. Create Your Event in Exware

- Login to [Exware](#) using the details received via the email from the General Accounting team member.
- Review the instructions provided.
- It is recommended that you outline the event logistics before setting up the registration in Exware.

Things to consider are:

1. Date(s) of event
2. How many tickets will be sold for each different rate (\$) category
3. Different rates (\$) and timing of when rates are available (i.e. early bird rates)
4. Do you want a waiting list?
5. Event Summary
6. Logo



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7.HST/GST (contact [hst.help@queensu.ca](mailto:hst.help@queensu.ca) if you need assistance)

- If you ask registrants for accessibility and/or dietary needs, the following phrasing is recommended:
  - Queen's is committed to an inclusive campus community with accessible goods, services, and facilities that respect the dignity and independence of persons with disabilities. Are there any steps we can take to make this a more inclusive and barrier-free event?
  - Do you have any dietary requirements?

## Note:

- Ensure you are accessing and collecting this information in a manner that aligns with our Queen's [Data Classification Standard](#) and the [Electronic Information Security Policy Framework](#)
- All events will be priced and transacted in Canadian Dollars (CAD).
- All transactions are charged a 2.6% credit card processing fee. This is coded to account 691004 with the chartfield information provided in the request form.

## Other Service Providers:

Exware is a Queen's University approved service provider for one-time events. If you would like to use an alternate, non-approved service provider, please follow the PCI Exemption Request Process detailed in the [Payment Card Acceptance Procedures: Section 3.0](#). Business units electing to apply for an exemption request should review Queen's University's [Payment Card Acceptance Policy: Section 4](#) to understand cost and responsibility commitments.