FSI Learner Portal Booking Guide

This short, simple guide has been developed to steer you through the booking process.

Please also see our Frequently Asked Questions page: http://www.thefsi.org/frequently-asked-questions/

Want to find out more about how to make the most of your learner portal? Check out this handy guide.

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Step 1 – Log in to your Account

Visit www.thefsi.org/join-us and click the ‘Member Login’ icon (if you have forgotten your password, there is a ‘forgotten password’ link on the following login page). Your username is the email address used to sign up.

If you have not registered yourself as a user previously, click ‘Become a Member’ and complete the registration form.

Step 2 – Add Courses to your Basket

NOTE – If you have clicked ‘Book Now’ on one of our website event pages and already have your desired items in your basket, skip to step 4. You can find all available events on our website, as well as via the Course Search.

Click ‘Course Search’

Enter your search criteria and click ‘Search’. To view all courses we have available in all locations (including webinars), click ‘Show All’.
Step 3 – Review your Basket

1. Click the drop down arrow next to the course title

2. Click ‘Book’. Please note this may read ‘Waiting List’ if the course is already fully booked (if this is the case, when selecting this option you will be taken through the remainder of the booking process, and will be added to the waiting list rather than prompted to pay).

3. Course details can be viewed by clicking here

4. Edit the number of delegates here (please see our FAQ page for max delegates per course/event)

5. Once happy, click ‘next step’ to confirm selection
Step 4 – Add Attendees

PLEASE NOTE* – The system is set up to allow delegates to book for themselves only as standard. If you find you are not able to add a colleague to a course, you will need to contact us (admin@thefsi.org) in order for us to change your permission settings. Please note we allow one person per organisation to book for colleagues. This user can also view past FSI services accessed by their organisation via their Dashboard, visible on first logging in here.

Click ‘Assign Myself’ if you are making the booking for yourself.

If you are booking on behalf of someone else, click ‘Assign Delegate’ (please see note* above about booking for others).

If you have selected ‘Assign Delegate’ for one or more places, please see the additional screenshots below. If not, please click ‘Next Step’ and proceed to step 5 of this guide.

If you have selected ‘Assign Delegate’, click ‘Create New’ to add a colleague to the booking.

Please note that if you already have the required permissions, a list of your colleagues already registered on our system will be available to select in the white space.
Step 5 – Paying your Deposit

Enter information in all of the required fields (fields marked with a *symbol). **The personal address fields can be the organisation's address.** If the attendee has any access or dietary requirements, please ensure these cells are completed (you will need to scroll down).

The ‘Billing details’ are linked on our system with the address of the member organisation the booking is for. This address is just for our records, and does not affect the actual payment, which can be made with any card PayPal accepts. You will be asked for card details, including the actual billing address, when entering your payment details on a subsequent page.

Please note this is the only payment method available.

Read and tick to agree with the terms and conditions, then click ‘Pay Now’. This will then redirect you to a payment page hosted by PayPal.
Payment Portal (provided by PayPal)

Our payment system is hosted by PayPal. You should be given the option to ‘Pay with Debit or Credit Card’, or else you can log in to an existing account.

If you are not given the option to pay with a card, it may be because you have signed into a PayPal account previously on your device, and this login is remembered by the browser. We recommend pressing ‘Cancel and return to Foundation for Social Improvement’ (bottom of the screen). You will need to clear your PC’s cookies/cache files and try again – this can also be resolved by using a different internet browser, if it has not been used to sign into PayPal previously.

Input your payment details. If you do not wish to create a PayPal account, click ‘No, thanks***. Press ‘Continue’ to complete and then finalise the transaction.

We strongly recommend that you do not close any browser windows until you have received booking confirmation emails from the FSI.

**A small number of our members have reported that creating a PayPal account is mandatory at this stage. This may be because your payment card has been used frequently at a PayPal guest checkout, and for security reasons PayPal requires you to create an account. PayPal customer support can be contacted on 0800 358 7911.

Unfortunately, at the time of writing, PayPal does not accept Charities Aid Foundation (CAF) cards. If this is the only type of card available to you for making bookings, please email us on admin@thefsi.org, specifying the course and individual you are trying to book.
Common Learner Portal functions

Slides and Resources

Following attendance at training courses and other FSI events, there are two key Learner Portal functions that you may want to use.

Presentation slides are available on the Learner Portal for attendees after each event (as above, the attendee may not have booked the course themselves), along with worksheets for downloading in advance of online webinar sessions. There are also supplementary materials linked with some courses, which are made available automatically.

To access the resources for all events you have attended, after logging in here, you will see the below homepage – click the ‘three-dot’ menu in the top right, then hit ‘My Resources’ to view a full list of available documents.

Evaluations

As per the terms and conditions of booking, and as listed on our FAQ page, partial refunds of event deposits are usually dependent on completion of pre- and post-event surveys. Links to access these are sent via email to all attendees, but surveys can also be accessed and reviewed via your Learner Portal homepage after logging in here, under ‘My Evaluations’.

If this guide has not been able to answer your queries, you can contact us at admin@thefsi.org.