

# FSI Learner Portal Booking Guide

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

Please also see our **FAQ (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](#).

## Contents

Step 1 – Login to your account .....	2
Step 2 – Add courses to your basket.....	2
Step 3 – Review your Basket.....	3
Step 4 – Add Attendees .....	4
Step 5 – Paying Your Deposit .....	5

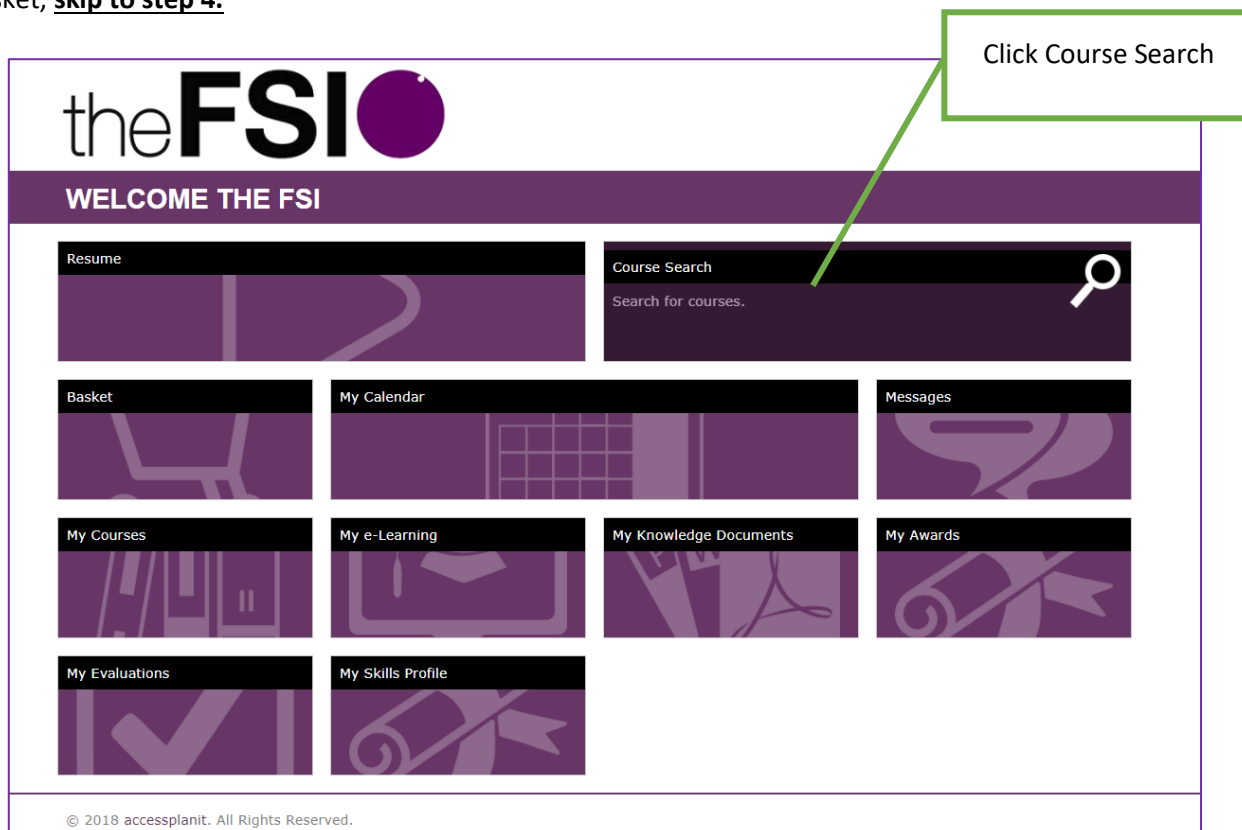
## Step 1 – Login to your account

Visit [www.thefsi.org/join-us](http://www.thefsi.org/join-us) and click the ‘member login’ icon (if you have forgotten your user name or password, there is a forgotten password link on the following login page). Your username is your email address.

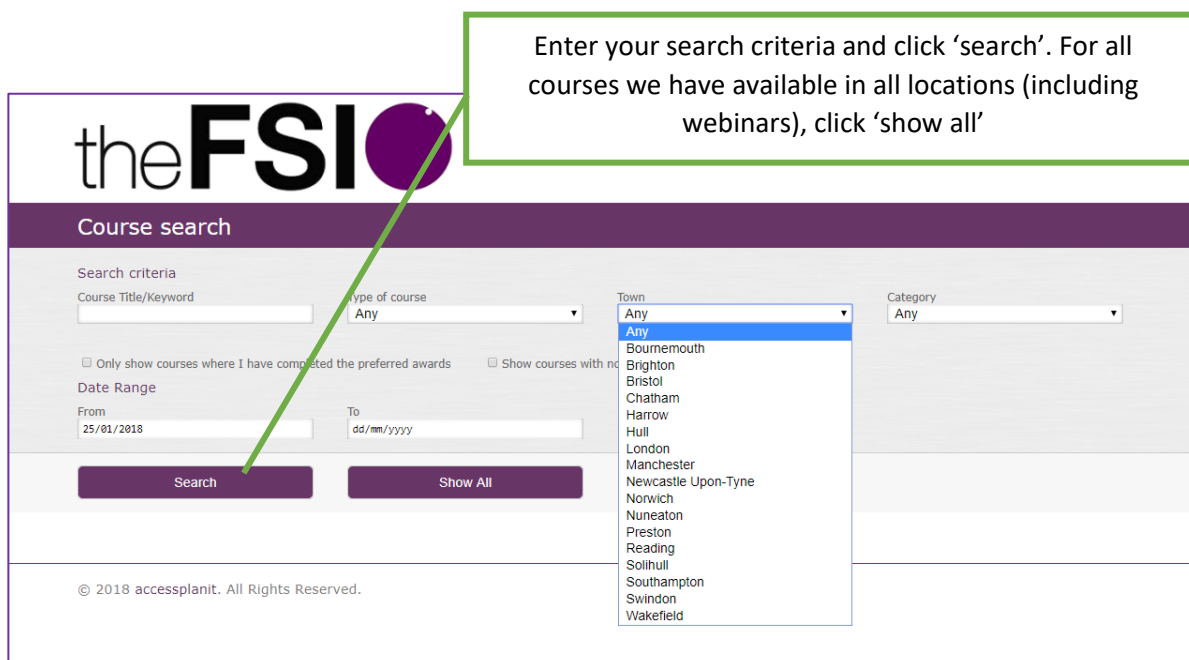
If you have not registered previously, click ‘become a member’ and complete the registration process.

## 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.**



The screenshot shows the user dashboard for 'theFSI'. At the top left is the logo 'theFSI' with a purple circle. Below it is a purple banner that says 'WELCOME THE FSI'. The dashboard is divided into several sections: 'Resume', 'Course Search' (with a magnifying glass icon and a callout box saying 'Click Course Search'), 'Basket', 'My Calendar', 'Messages', 'My Courses', 'My e-Learning', 'My Knowledge Documents', 'My Awards', 'My Evaluations', and 'My Skills Profile'. At the bottom, there is a copyright notice: '© 2018 accessplanit. All Rights Reserved.'



The screenshot shows the 'Course search' page. It features a search criteria section with the following fields: 'Course Title/keyword' (text input), 'type of course' (dropdown menu with 'Any' selected), 'Town' (dropdown menu with a list of towns including Any, Bourmemouth, Brighton, Bristol, Chatham, Harrow, Hull, London, Manchester, Newcastle Upon-Tyne, Norwich, Nuneaton, Preston, Reading, Solihull, Southampton, Swindon, and Wakefield), and 'Category' (dropdown menu with 'Any' selected). There are also checkboxes for 'Only show courses where I have completed the preferred awards' and 'Show courses with n...', and a 'Date Range' section with 'From' (25/01/2018) and 'To' (dd/mm/yyyy) fields. At the bottom are 'Search' and 'Show All' buttons. A callout box says: 'Enter your search criteria and click ‘search’. For all courses we have available in all locations (including webinars), click ‘show all’'. At the bottom, there is a copyright notice: '© 2018 accessplanit. All Rights Reserved.'

1. Click the drop down arrow next to the course

theFSIO

Course search

Search again

Search results

Course	Type	Action
An Introduction to Online Fundraising & Crowdfunding	Class	▶
Demonstrating Your Impact	Class	▼

Date	Venue	Status	Cost	Action
08/02/2018 09:30 - 16:30	Central Methodist Hall (Manchester)	Available	£50.00 (PC)	Book

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2. Then click 'book'. Please note this may say 'waiting list' if the course is already fully booked. (If this is the case, you will go through the remainder of the booking process but will not be asked to pay)

### Step 3 – Review your Basket

3. Course details can be viewed by clicking here

4. Change number of delegates here (please see our [FAQ page](#) for max delegates per course/event)

5. Once happy, click 'next step' to confirm selection

theFSIO

Shopping basket | Basket | Login | Delegates | Payment | Confirmation

Your basket

Basket

Use this section to edit or remove courses from your basket.

Title	Location	Date	Delegates	Cost	
Demonstrating Your Impact <a href="#">Course Details</a>	Central Methodist Hall (Manchester), Manchester	08/02/2018 09:30:00	1 ▼	GBP 50.00	Remove Course ✕
				<b>Total</b>	GBP 50.00

Clear Basket ✕

Next Step ➔

**IMPORTANT NOTICES:**

- Please ensure that you add delegates to your bookings, by selecting 'Add Delegate' or 'Add Myself' and completing the **Additional Information** e.g. **Special or Dietary Requirements**. If you do not assign a delegate, your place may be cancelled.
- The cost above represents the initial deposit you pay. The majority will be refunded upon full attendance and completion of feedback surveys.
- Please do not select more than **2 tickets per organisation, per course**. If you select more than 2 tickets per course, or your booking is otherwise ineligible due to not fitting our membership criteria, all of your places will be cancelled and your deposit returned minus an administration fee.

FSI Learner Portal

## Step 4 – Add Attendees

**PLEASE NOTE** – The system is set up to allow delegates to book themselves 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](mailto:admin@thefsi.org)) in order for us to change your permission settings. Please note we allow one person per organisation to book for colleagues.

The screenshot shows the 'Delegate' page in a shopping basket. At the top, a navigation bar includes 'Shopping basket', 'Basket', 'Login', 'Delegates', 'Payment', and 'Confirmation'. Below this, the 'Delegate' section displays a table with the following data:

Title	Location	Date	Delegate	Cost
Demonstrating Your Impact <small>course details</small>	Central Methodist Hall (Manchester), Manchester	08/02/2018 09:30:00	1	GBP 50.00

Below the table, there are two buttons: 'Add Delegate +' and 'Add Myself +'. A yellow bar at the bottom of the table shows a total of GBP 50.00. A red 'Clear Basket' button is on the left, and a green 'Next Step' button is on the right. A callout box with a green border points to the 'Add Myself' button and contains the following text:

Click 'add myself' if you are placing the booking for yourself.

If you are booking on behalf of someone else, click 'add delegate'. (Please see note above about booking for others)

If you have selected 'Add 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.

The screenshot shows a search form with the following fields: 'First Name', 'Last Name', and 'Account Qualifications (FSI)'. A 'Search' button is located to the right of the 'Account' field. Below the search form, there are two buttons: 'Create New +' and 'Cancel'. A callout box with a green border points to the 'Create New' button and contains the following text:

If you have selected 'Add 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 in our system will be available to select in the white space.

Add/edit candidate

Candidate details

Title  
Mr

First name \*

Middle name

Last name \*

Job Title

Personal address

Address \*

Town/City \*

Country/State \*

Postcode/Zip Code \*

Cancel ← Save Candidate Details →

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).

## Step 5 – Paying Your Deposit

Title	Location	Date	Cost
Demonstrating Your Impact <small>course details</small>	Central Methodist Hall (Manchester), Manchester	08/02/2018 09:30:00	GBP 50.00
<b>Subtotal</b>			GBP 50.00
<b>Discount</b>			
Discount code <input type="text"/> <input type="button" value="Apply"/>			
<b>VAT at 20%</b>			GBP 0.00
<b>Total</b>			GBP 50.00

Clear Basket ✕

Agent details

If you are booking on behalf of an agent, please enter their Agent ID below.

Agent ID

Billing details

Please enter your billing details below.

Account

Address

Town/City

Country/State

Postcode/Zip Code

Country

Payment details

Please select how you would like to pay.

Method of payment \*

PO Number

I have read and accept the [terms and conditions](#)

WARNING! Do not use the Back Button or Refresh during the payment process as this may result in duplicate payments!

**Please note**  
this is the only payment method available

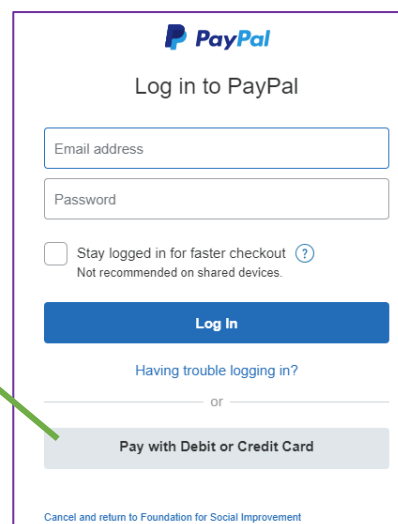
You do not need to complete **Agent Details** or **Billing Details** (you will be asked for these when entering your payment details on a subsequent page).

Read and click to agree with the terms and conditions and 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 a Debit or Credit Card, if you don't have a Paypal Account.

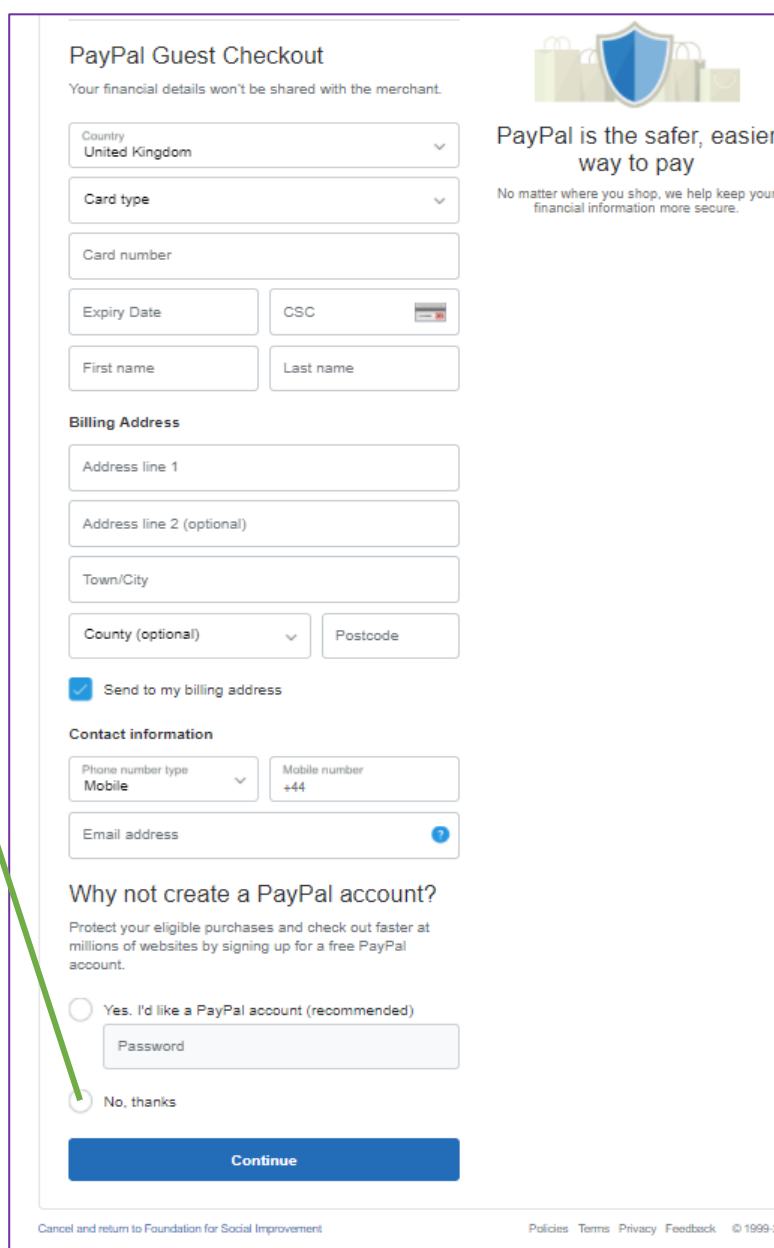
If you are not given this option, it maybe because you have signed into a paypal account previously on your computer. We recommend pressing '**cancel and return to Foundation for Social Improvement**' (bottom of the screen). You will need to clear your PC's cookies/cache files and try again.



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 is mandatory at this stage. This maybe because your payment card has been used frequently at a paypal guest checkout, and for Paypal security requirements, Paypal requires you to create an account. Paypal customer support can be contacted on **0800 358 7911**.



If this guide has not been able to answer your queries, you can contact us at [admin@thefsi.org](mailto:admin@thefsi.org).