

# How do I create a Registration Form?

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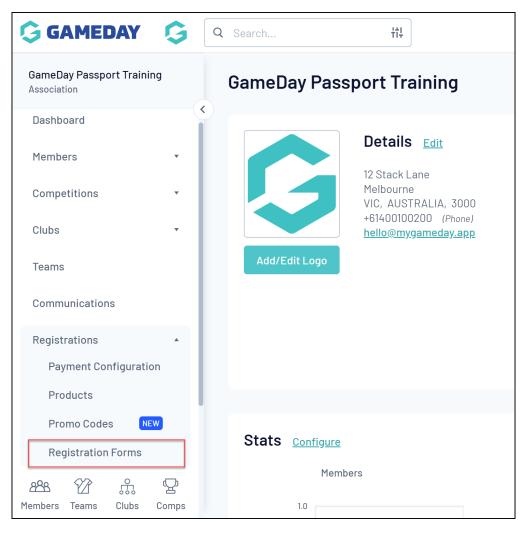
Creating a **Registration Form** allows you to set up your entire registration process through an end-to-end form builder, including the configuration of general settings, fields, layout and presentation, products, custom messaging, notifications and more.

To get started with the **Registration Form** setup process you will firstly need to add a new form.

**Note:** If you are part of a hierarchy, you can directly access any Registration Forms that have been created and shared with you from a higher level. In this instance, find your form in the **Parent Body Forms** section and click **EDIT**, then skip directly to step 2 below.

### 1. Add a Registration Form

1a. To Add a new Registration Form, open the **Registrations** menu, then select **REGISTRATION FORMS**.



#### 1b. Click ADD NEW FORM

Team to Association Form (#101430)	Team to Association	View		Edit	ආ	ф	Ē	< Share
Member to Team Form (#101431)	Member to Team	View		Edit	ආ	4	圃	< Share
GameDay FC Registration (#101187)	Member to Club	View	Link	Edit	ආ	÷	Ē	🔩 Share
GameDay Fun Run Event Form (#102561)	Member to Event			Edit	ආ	<b>"</b>	圃	
Add New Form								

# 2. Settings Tab

2a. Complete the **Settings** tab. This will allow you to choose some basic Registration Form configurations.

Registration Form (Ne	ew)	
Settings		Continue
Fields	Form Name:	Membership Registration Form
Layout	Type of Form:	<ul> <li>Member registering to an Association</li> <li>Member registering to a Club</li> </ul>
Conditional Fields		<ul> <li>Member registering to a Team</li> <li>Member registering to a Program</li> </ul>
Products		<ul> <li>Member registering to an Event</li> <li>Team registering to an Association</li> </ul>
Conditional Products	Form Enabled	
Messages	Payment is Compulsory	[This option should be set only if payments are enabled and you have merchant account set up.]
Notifications		Payments are enabled. A Merchant account has been set up. Bank Account has been verified. When this option is set and there is at least one mandatory product, then registrants must also pay online in order to complete the registration. See <u>how to make a product</u> <u>mandatory.</u>

A	llow Member to Register as:	Player Coach Manager Official Non Competitor or Supporter Volunteer
	Ilow multiple registration family registration process):	IMPORTANT NOTE: This will allow you to register and pay for multiple people at once. You need to check the boxes below to allow multiple adults or children (or both) to be entered using this process.         Using this process, some details from the initial person's registration will be copied to the subsequent forms, and a single payment will be made covering all the registrations.         Image: Allow multiple adults to register?
R	Registration Options:	Allow all registrations
P	rimary colour:	#40bfc4 Applies to primary buttons. Default colour will be used if left blank.
S	econdary colour:	#0d1a40 Applies to secondary buttons and active step background. Default colour will be used if left blank.
P	age background colour:	#ffffff Applies to the page background. Default colour will be used if left blank.
		Continue

**Form Name**: The name of your registration form as displayed to registrants.

**Type of Form:** Please see our Registration Form Types article for further information

Form Enabled: This option will activate or deactivate your Registration Form

**Payment is Compulsory:** When this option is selected and there is at least one mandatory product, registrants must pay online at the time of registration in order to complete the registration.

**Allow Member to Register as**: This will allow members to select a Member Type. You can choose which Member Types are applicable to this form.

Allow multiple registration: This will allow multiple members to be registered in the same

session.

#### **Registration Options:**

- Allow all registrations: Anyone can register through this registration form.
- Allow new registrations if not in the national system : Only members who aren't currently in the national database can register.
- Allow new registrations only if in national system : Only members who are currently in the national database can register.
- Allow existing members only: Only allows members who have previously registered through Passport.
- Allow new registrations only: Only allows new members to register through this form.
- Allow new only if already in the association : This will allow new members to register, but only if they are already entered into the association database.

**Colour Options**: Allows you to apply a Primary, Secondary and Background colour scheme to the registration form.

Click **CONTINUE** when you are ready to move forward.

### 3. Fields Tab

3a. Use the **Fields** tab to apply display settings to any of the fields available to you in your database. This includes standard fields and custom fields.

**Note:** Fields are hierarchical, meaning that if a level above your organisation (e.g. National Body, State, Zone, Association etc.) has set a Field as Editable or Compulsory, it cannot be removed from your Registration Form and must be answered by participants.

Each available field will appear here with a visibility setting along the top of the screen. Fields can be configured to display in several ways:

- Hidden This means the field does not appear at all.
- **Read Only** This field will display, however it cannot be edited only use this option if the answer to this field won't change (e.g Birth Certificate Number, Date of Birth etc.).
- **Editable** This means that the field will display, but it can be left blank if they don't want to answer this field.
- Compulsory This means that the field will display, and it must be completed before saving.
- Add Only (Compulsory) This means the field will appear as compulsory but it cannot be edited once it has been completed.

Registration Form (#10	09910)						
Settings 📀	Choose the visibility and editing options for each of the available Member fields.						
	Field Name	Hidden	Read Only	Editable	Compulsory	Add Only (Compulsory)	
Layout	National Number	۲	0				
Conditional Fields							
Products	Member Number	۲	0	0	0	0	
Conditional Products	Active in Association	۲	0	0	0	0	
Messages	Salutation	0	0	۲	0	0	
Notifications	Legal Firstname				۲	0	

Click **CONTINUE** when you are ready to move forward.

# 4. Layout Tab

4a. Use the **Layout** tab to configure the order in which your fields display on your registration form.

To arrange the order of your fields, click and drag the field and drop it to move it into a position on the form. It will save automatically.

Your browser does not support HTML5 video.

The Layout tab also allows you to add custom **Text Blocks** and **Header Blocks** on your registration form, using the **ADD HEADER BLOCK** or **ADD TEXT BLOCK** options:

Settings 🥥	Reorder the fields by dragging them to position. The new order is saved automatically. Extra blocks of headers or text can be added by clicking the respective buttons.	
Fields 🔮	Add Header Block Add Text Block	Continue
Layout	: Salutation	RULES
Conditional Fields	ii Legal Firstname - Step 1	
Products	Family name - Step 1	
Conditional Products		
Messages	Preferred name	RULES
Notifications	: Date of Birth - Step 1	
	H Address Line 1	RULES
	H Address Line 2	RULES
	∷ Gender Identity - Step 1	

Enter your Block Label and Content. The **Block Label** will be the name of the Header/Text Block in the Layout tab, and the **Block Content** will be what displays on your registration form.

Below is an example that will display This will be your heading

embership Reg	istra	tion Form (#	109910)
Settings	0	Block Label:	Heading
Fields	0	Block Content:	This will be your heading
Layout			
Conditional Fields			
Products			Save Header Block
Conditional Product	s		
Messages			
Notifications			

: Country	RULES
: Postcode	RULES
: Telephone Number (Home)	RULES
E Telephone Number (Work)	RULES
: Telephone Number (Mobile)	RULES
Image: H-Block => Heading	REMOVE RULES EDIT
: Email	RULES
Email 2	RULES
: T-Block => Text	REMOVE RULES EDIT
Add Header Block Add Text Block	Continue

Below is a text block that will display *This will be your text* 

Membership Registrat	embership Registration Form (#109910)							
Settings 🥥	Block Label:	Text						
Fields 🔗		This will be your text						
Layout								
Conditional Fields	Block Content:							
Products								
Conditional Products	Save Text Block							
Messages								
Notifications								

: Country	RULES
II Postcode	RULES
: Telephone Number (Home)	RULES
	RULES
E Telephone Number (Mobile)	RULES
∷ H-Block => Heading	REMOVE RULES EDIT
: Email	RULES
Email 2	RULES
II     T-Block => Text	REMOVE RULES EDIT
Add Header Block Add Text Block	Continue

You also have the ability to apply **Display Rules** to specific fields. For example, you might want to hide the Parent/Guardian fields from registrants over the age of 18, or hide a Telephone Number field from registrants under 18.

To add a Display Rule to a field, click the **RULES** button next to the corresponding field:

ii F	Postcode	RULES
	Telephone Number (Home)	RULES
	Telephone Number (Work)	RULES
	Telephone Number (Mobile)	RULES
: H	H-Block => Heading	REMOVE RULES EDIT
<b>ii</b> [	Email	RULES
<b>!!</b> [	Email 2	RULES
	T-Block => Text	REMOVE RULES EDIT
Add	Header Block Add Text Block	Continue

Choose to display the field to a specific gender or date of birth range. In the example shown below, we are applying a Display rule based on the member's date of birth so that the **Telephone Number (Work)** field only displays to members born before **31 December 2005** 

Membership Registrat	ion Form (#109910)
Settings 🥥	Enter the conditions which must be met before the field is displayed on the rego form.
Fields	Save
Layout	Name: Telephone Number (Work)
Conditional Fields	Gender:
Products	Minimum DOB: Month  Mon
Conditional Products	Maximum DOB: 31 Dec 💌 2005 C Younger end of Date Range (eg 31 - Dec - 2000)
Messages	Save
Notifications	

# 5. Products Tab

5a. The **Products** tab allows you to link previously created products to your registration form.

Any products that you tick in the **Active** column highlighted below will display on your registration form.

Settings	0					on the registration form by checking the co provide the products they are dependent o		ıg 'Active' bo
Fields	0			, p , p				Continu
Layout	0	Active	Mandatory 🚺	Sequence i	Group	Product Name	Price	Created By
Conditional Fields					Association Fees	2022/2023 Age 06 Membership Fee	50.00	Association
Products					Association Fees	2022/2023 Age 06 Membership Fee (Copy)	50.00	Association
Conditional Produc	ts				Association Fees	2022/2023 Age 07 Membership Fee	50.00	Association
Messages					Association Fees	2022/2023 Age 08 Membership Fee	50.00	Association
Notifications					Association Fees	2022/2023 Age 10 Membership Fee	50.00	Association

The **Mandatory** checkbox option will set the product as pre-selected for the member.

Membership Regi	strat	tion Fo	rm (#109	9910)				
Settings						the registration form by checking the corre	espondin	g 'Active' box.
Fields	0	,		, <u>.</u>				Continue
Layout	0	Active	Mandatory 🚺	Sequence 🚺	Group	Product Name	Price	Created By
Conditional Fields	0				Association Fees	2022/2023 Age 06 Membership Fee	50.00	Association
Products					Association Fees	2022/2023 Age 06 Membership Fee (Copy)	50.00	Association
Conditional Products					Association Fees	2022/2023 Age 07 Membership Fee	50.00	Association
Messages					Association Fees	2022/2023 Age 08 Membership Fee	50.00	Association
Notifications					Association Fees	2022/2023 Age 10 Membership Fee	50.00	Association
					Association Fees	2022/2023 Age 11 Membership Fee	50.00	Association

For information on creating a Product, please see our Create a Product article.

#### 6. Messages Tab

6a. The **Messages** tab allows you to add custom text throughout the registration form process to act as a guide for your members completing the form, including a dedicated section for Terms & Conditions.

The tabs along the top of the page represent different pages of the registration form, as well as an option to display an Unavailable Message which will display to members trying to access the form if it is inactive.

Settings	0	Continue
Fields	0	Customise the text that displays at various stages of the registration process.
Layout	0	Choose Type         Basic Info         Questions         Summary         Credit Card Payment         Confirmation Email         Unavailable Message
Conditional Fields	0	This text will appear on the first page above the login section.
Products	0	Welcome to our registration form! Please see the footer section below for contact details should you need any
Conditional Products	0	assistance completing the form.
Messages		
Notifications		

**Terms & Conditions** can be added in the **Questions** tab and can be made mandatory in order to proceed through the registration process.

Terms & Conditions		
Add your Terms & Cond	itions here]	
Include an "I Agree to	he above Terms & Conditions" mandatory checkbox?	

### 7. Notifications Tab

7a. The **Notifications** tab allows you to choose who should receive emails following a completed registration. You will need to ensure Organisation Contacts have been entered ensuring that the email is received as intended. For information on entering Contacts, please see our Contacts article.

					Continu
Choose who should	receive the emails ema	anating from the	e registration pro	cess.	Contine
Type of Email	Send to Association	Send to Club	Send to Team	Send to Member	Send to Parent/Guardian
New Registrations	Emails	<b>I</b>			
Renewals	Emails	<b>I</b>			
Payment Advices	Emails	<b>I</b>			
	Type of Email       New Registrations       Renewals	Type of Email     Send to Association       New Registrations     I Emails       Renewals     I Emails	Type of Email     Send to Association     Send to Club       New Registrations     I I Emails     I I       Renewals     I I Emails     I I	Type of Email     Send to Association     Send to Club     Send to Team       New Registrations     Image: Emails     Image: Emails     Image: Emails       Renewals     Image: Emails     Image: Emails     Image: Emails	New Registrations     Imails     Imails     Imails     Imails       Renewals     Imails     Imails     Imails     Imails

## 8. Viewing Your Registration Form

You can view the front-end version of your form by clicking the VIEW FORM button at the top of the form editor.

				View Form
				Cashious
the emails emanating from				Continue
Send to Association	Send to Club	Send to Team	Send to Member	Send to Parent/Guardian
Emails				
Emails				
Emails				
				Continue

If you are logged into an Association or Club, you can also view your form by navigating to **Registrations** > **Registration Forms** > Click the **VIEW** link next to the applicable form.

Parent Body Forms								
National Registration Form 2023 (#104452)	Member to Club	Set Primary	View		Edit			< Share
National Registration Form 2022 (#103697)	Member to Club	Set Primary	View		Edit			< Share
Club Forms								
Bears Club Membership (#108904)	Member to Club		View	Link	Edit	ආ	圃	< Share

This will open the front-end version of your registration form, allowing you to see exactly what your members will see when registering through the form.