

The Role Registration Flow — Walkthrough

The Registration Page

The Role Registration Flow begins on the registration page. There, the user is asked to provide an email, and then their name and a password. The user may also register through one of our social sign-on options. Once this information is submitted, the user is logged in and is directed to the registration process.

At this point, the registrant is considered to have an account, but did not complete their registration. For the user, access to the site is restricted, keeping them locked into the registration interface until they complete their registration. The interface is completely clean except for a header bar which contains the organization name (this can be replaced by uploading an image to the campaign's Media Library > Mobile Image) and the user's profile dropdown, and the registration flow itself. If the user logs out or closes the browser window before completing registration, they can get back to where they were by going through either the registration or login flow. [Please click here for more information on Account Holders.](#)

The image shows two sequential registration screens. The first screen is titled 'Enter your email address to get started.' and features an input field for 'Email Address' and a blue 'NEXT' button. Below it are social login options: 'Register With Facebook', 'Register With Twitter', and 'Register With Google'. A link at the bottom says 'Have an account? Click here to log in.' The second screen is titled 'Provide your name and a password to continue your registration.' and features input fields for 'Name' and 'Password', and a blue 'ACCOUNTS' button. It also includes the same social login options and a 'Have an account? Click here to log in.' link.

Step 1: Welcome

In many implementations (see note below), the user is greeted with a welcome message and a choice to quickly identify their participation in the event: will they be an attendee, a fundraiser, or both? Clicking one of these options will determine which roles are enabled in the next screen.

- Campaign must have Fundraiser role
- Campaign must have Attendee role
- The Fundraiser and Attendee roles must each have their own form
- Neither role is selected by default
- Neither role is inactive
- Neither role is required
- Neither role is expired
- Neither role is unavailable

The welcome screen may also be skipped or customized based on a campaign setting. Please contact us to set this up.

The image shows a registration screen for 'PACIFIC OCEAN'. At the top, it says 'Welcome to our online events. Here is the next step in your registration.' Below this are three buttons: 'Fundraiser', 'Attendee', and a larger blue button labeled 'Fundraiser / Attendee'.

Step 2: Identifying Roles

The next screen is where the user fills in all information related to themselves and their chosen roles. They may be asked (depending on the configuration) to enter their contact information, enable or disable roles as desired, provide information related to their chosen roles, answer any custom questions added by administrators, and join or create a team. Some details regarding roles and fields:

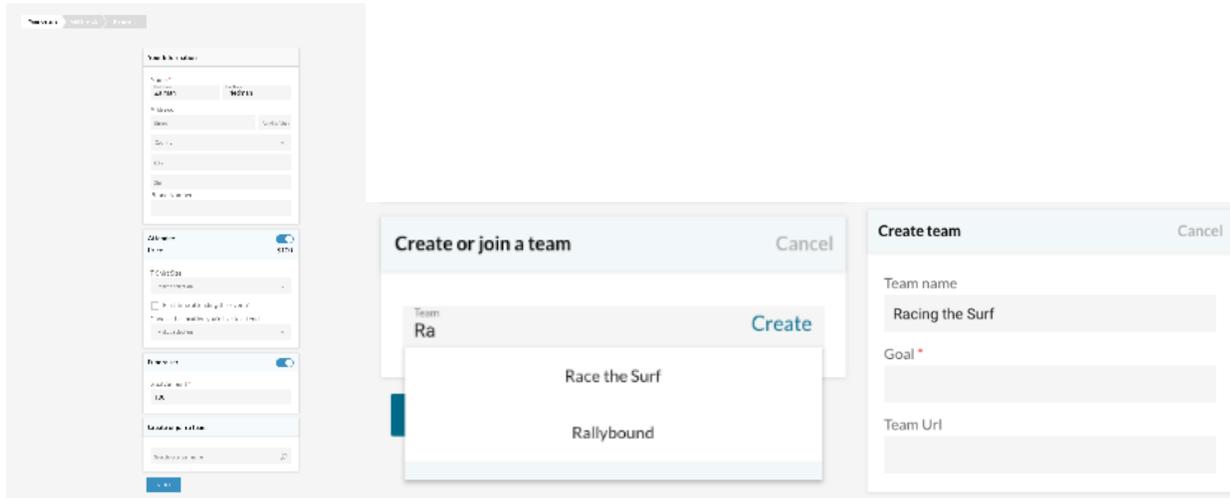
- Roles are enabled and disabled by clicking the on/off toggle at the top right of the given role.
- Costs on roles are indicated beneath the toggle.
- Costs on fields are indicated on the field or field option (in the case of dropdowns and multi-selects) itself.
- Required fields are indicated with a red asterisks.

Teams

Joining a team: A team is joined by searching for the team name. A dropdown will appear as the user enters text into the search box that shows the user results of their search. Once the user locates their team name, they select it.

Creating a team: A team is created by entering a team name in the search field that doesn't match any existing team name. The user then clicks the "Create" text to the right of the search field. This expands the team form to request information related to creating a new team.

Once the user has entered their information as desired, they click "Next".



Step 3: Adding Friends

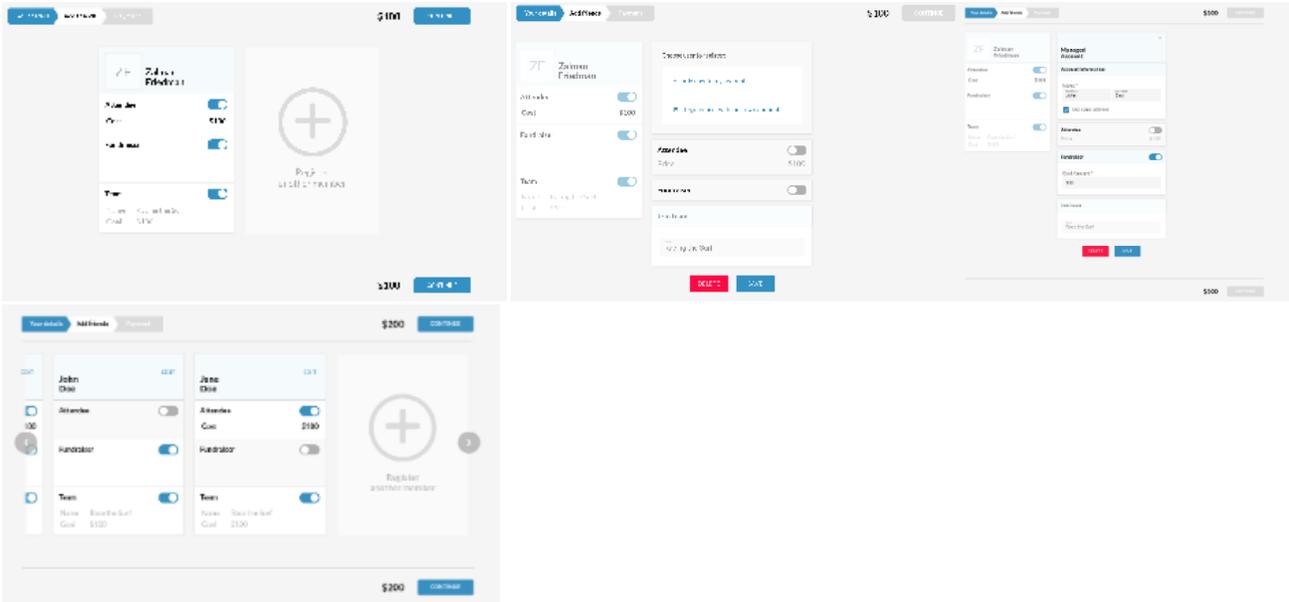
In this step, users can review their registration and add registrations for friends and family. In this screen, the registration cost is shown at the top and bottom of the page, near the "Continue" button. If the user does not want to add registrants, they can just click "Continue" at the top or bottom of the page to complete their registration.

To add another registrant, the user clicks on the "Register another member" card, which is always in the right-most position. At that point, the user is presented with two options:

1. Add user to my account: This adds the new registrant to the user's account. All registrants added to the same account will share the same login credentials (in other words, will use the same email and password to log in). The registrant will be able to switch users by logging in and accessing the profile dropdown in the top right of the website. [Please see here for more on managed users.](#) Use this option primarily to add family members who are too young to have their own email address or login information.
2. Register user with their own account: This creates a new registration for a user who will manage their own account with their own login credentials. The invited user will receive an email prompting them to complete their registration. The benefit of this option is primarily to pay for someone else's registration and invite them to manage their account at the same time. [Please see here for more on invited users.](#) If a user simply wants to invite a friend to register themselves, this should be done in the Fundraiser Dashboard after registration is complete. [Please see here for more on inviting users from the Fundraiser Dashboard.](#)

Once an option has been chosen, the user continues filling out the additional registrant's information, in much the same way as they did their own. In the contact section there is an option to "Use same address" as the original registrant, which makes it much easier to register family members without having to enter the address multiple times. When inviting a user who is already registered on a different campaign, name and contact fields are omitted from the registration form, as that information is already collected for that user. Team information of additional registrants always matches that of the initial registrant. When all the information is complete, the user clicks "Save", and that collapses the new registrant card, much like with the initial card. The user can now add more registrants, or continue on to complete their registration.

All Identity Cards may be edited in this interface. This is done by clicking any card, which expands the card so that it is editable in the same way as when it was originally created. Additionally, from this point and on, previous steps are accessible through the progress indicator in the top left.



Step 4: Complete Registration

If there is no charge or waiver associated with the registration, the user clicks "Complete Registration", and registration is immediately completed.

If there is a charge or waiver associated with the registration, when the user clicks "Continue" they are greeted with a lightbox prompting them to add a donation along with their registration. They can enter a donation amount, or they can decline to do so; either way they are directed to the final step of registration. Here, the user can view an itemized summary of their registration, along with registration costs and their donation amount in a summary box to the right. They can also enter a discount code in the same box if applicable.

Note

For fundraisers, their donation will count towards their goal. For non-fundraisers, their donation will count towards the campaign's goal (even if they are joining a team).

The user enters their billing and payment information, ticks a checkbox to agree to a waiver (if applicable), and clicks "Complete Registration". At this point, their payment is processed and their registration is complete. The user is then directed to a post-registration page thanking them for their registration, which automatically redirects the user to their Fundraiser Dashboard after a few seconds. Registrants may be added after registration from the "My Info" tab in the Fundraiser Dashboard. [Please see here for more on adding registrants after registration.](#) If the user chose to register as an attendee only (not a fundraiser), their dashboard will consist of some text and a view of their Identity Cards. [Please see here for more information on Attendees.](#)

