



# How do I create a Registration Form?

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## Overview

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, or follow the steps outlined [here](#).

## Step 1: Add a Registration Form

To add a new Registration Form, open the **Registrations** menu > select **Registration Forms** > click **ADD NEW FORM**

## Step 2: Configure the Form Settings

Complete the **Settings** tab. This will allow you to choose some basic Registration Form configurations, including:

**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 Status:** If set to active, the form will be available for registrants to use. If set to inactive, the form will be unable to accept any registrations

**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.

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### Step 3: Add Fields to the Form

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** means the field does not appear at all

**Read Only** fields 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** means that the field will display, but it can be left blank if they don't want to answer this field

**Compulsory** means that the field will display, and it must be completed before saving

**Add Only (Compulsory)** means the field will appear as compulsory but it cannot be edited once it has been completed

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

## Step 4: Configure the Field Order

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.

**Note:** If you are editing a Parent Body Form, any fields that have been added from a higher level will be locked, meaning you are unable to remove or change the order of those fields:

**National Registration Form (#53376)** [View Form](#)

Settings Fields **Layout** Conditional Fields Products Conditional Products Messages

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.

[Add Header Block](#) [Add Text Block](#)

Legal Firstname - Step 1	Locked By Sample National Federation
Family name - Step 1	Locked By Sample National Federation
Date of Birth - Step 1	Locked By Sample National Federation
Gender at Birth - Step 1	Locked By Sample National Federation
Email	Locked By Sample National Federation
Country of Birth	<a href="#">RULES</a>
Postal Address Line 1	<a href="#">RULES</a>

## Step 5: Create Additional Content Blocks (optional)

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

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

## Step 6: Apply Field Display Rules (optional)

You also have the ability to apply **Display Rules** to specific fields. For example, you might want to hide 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:

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 **Occupation** field only displays to members that are over 18.

## Step 7: Set up Conditional Field Rules (optional)

Conditional Fields provide administrators greater flexibility over the way in which fields are displayed on a Registration Form, as well as providing a more concise user experience. It allows administrators to display certain fields on a form only if another question is answered, as that particular field may only be applicable to certain types of members.

Here, you can set Control Fields, which determine whether any subsequent fields are shown or hidden based on the user's response.

For example, I might want to apply a rule to my form that only shows the **How many national games to you attend per season?** question to members who stated that they are a member of a national team, therefore hiding it for those that aren't:

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**Note:** For a field to be shown/hidden based on a control field, it must be ordered below the control field on the Layout tab

## **Step 8: Add Products to the Form**

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

You can use the **ADD PRODUCTS TO FORM** to attach any existing product to the form

The **Mandatory** checkbox option ensure products are pre-selected for members

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For information on creating a Product, please see our [Create a Product](#) article

## **Step 9: Set up Conditional Product Rules (optional)**

Conditional Products, similar Conditional Fields, allow you to show or hide certain products that are attached to your form based on the users' response to a form question

For example, I might want to apply a rule to my form that only shows the Affiliation Fee (Seniors) product to members who stated that they are a member of a national team, therefore hiding it for those that aren't:

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## Step 10: Add Custom Messages to the Form

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.

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



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## Step 11: Configure your Notifications

The **Notifications** tab allows you to choose who should receive emails following a completed registration.

**Note:** 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

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## Step 12: View the Form

You can view the front-end version of your form by clicking the **VIEW FORM** button at the top of the form editor at the level stipulated in the Form Type (I.e. 'Member to Association' forms can be opened at Association level)

**Note:** 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.

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

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