Altru Masters Workshop

Creating the Best Online Experience for your Patrons

Part 2: User Registration

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Agenda

❑ What is User Registration?

❑ What are the benefits?

❑ How do patrons register?

❑ How does registration look in Altru?

❑ What do I do if someone has trouble registering?

❑ What do I do if someone didn't receive their member discount?

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What is User Registration?

User Registration is a tool that Altru uses to match constituent records in the database to patrons making online purchases.

What are the benefits?

- Automatically fill in personal information such as address, phone, e-mail address, etc.

- Automatically apply discounts for which the patron is eligible (for example, member discounts)

- Add the order to the constituent record once complete, therefore preventing potential duplicate constituent records.

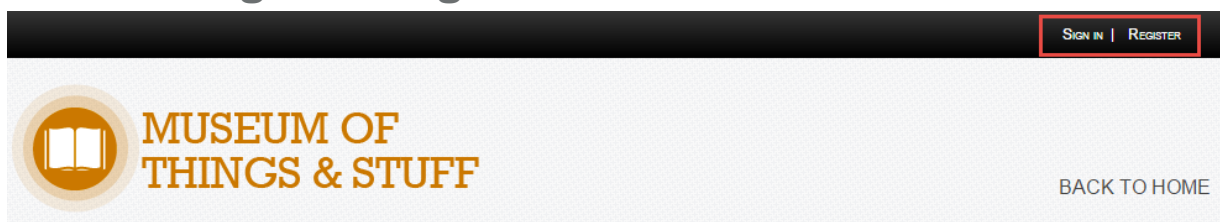- See what web forms your patrons are visiting.

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How do Patrons Register?

Two Ways to Register

1. Use the **Sign In/Register Button:**

2. Register **during Check out**:

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How can I tell if someone is registered?

You can actually see from the Constituent whether or not a constituent has registered for your website. Open their record and look for the **Online Info** tab. If the tab isn't present, you know the constituent has not successfully registered:

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What if someone can't register?

You may encounter patrons who aren't sure how to register or are having troubles.

Here are some common registration issues:

- Not sure how registering for the website differs from registering for a program or event

- They have already registered and don't remember

- They can't remember their password

- An error occurs linking the login to the constituent record

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What if someone can't register?

How to Help

1. **Check their record for Online Info**. If the patron is already registered, you can see their username and edit it if needed. You can also see if they aren't registered and need help.

2. **Register on the patron's behalf.** If the patron is confused between registering for the site and registering for the event, you can guide them to the Register button or better yet—register for them! Go to your Web Forms click Register and type in the address, phone, and email address information on their Altru record (after verifying of course!)

3. **Edit your Error Messages.** Help your patrons get help! Under Web > **User Registration Settings** go to the Language Tab. Edit your errors to be reflective of what's going on and be sure to include a phone or email for patrons to get help quickly.

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New Feature

Edit a User Name

Previously to our Altru 4.1 release you could not edit a user's online information. In February 2015, we added the ability to edit a user name. For example, if a constituent has a new email address, we can now edit their username to reflect this:

1. Go to the constituent record
2. Go to the Online Info Tab
3. Click Edit
4. Enter new Email and Save

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What if someone doesn't receive their discount?

Use one of these options to remedy the issue now:

1. **Partially refund the amount of the discount**
   1. Do not need to charge the patron's card again
   2. You will <u>not</u> be able to reschedule tickets (See Knowledgebase: <u>Unable to reschedule partially refunded tickets </u>(BB755478))
   3. You will <u>not</u> be able to refund the ticket further (See Knowledgebase: <u>Unable to refund an item after issuing partial refund </u>(BB748700))
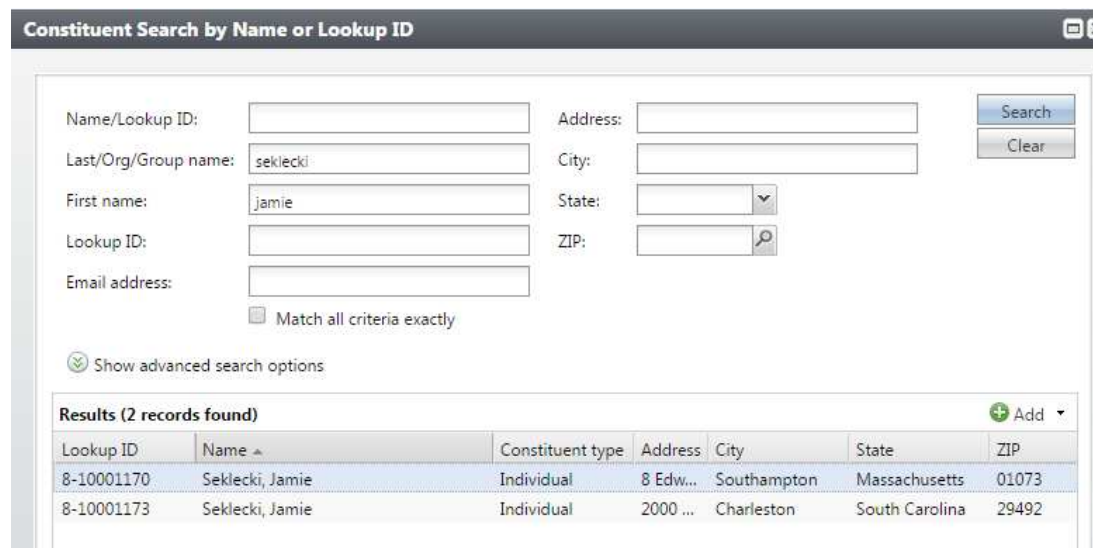
2. **Fully refund the incorrect transaction and process another transaction with the discount**
   1. Will need to get the patron's credit card information and they will see a full refund of that item and a charge for the new item.
   2. You will be able to process further refunds
   3. You will be able to reschedule tickets if needed.

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What if someone doesn't receive their discount?

Step 1: Check for duplicate constituents

Often times, when constituents register online, they may enter a nickname, a different address or a different email or phone than we have on file. This doesn't result in a high enough match percentage for Altru to connect the registration with the constituent and Altru creates a new constituent record. **Merging the records will solve the problem**. Also performing a regular database merge will help mitigate these issues.

See our Managing Duplicates Curricula for instructions!

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What if someone doesn't receive their discount?

Step 2: Check to see if the constituent is registered for your website

If the constituent never registered for the website, Altru couldn't recognize them as qualifying for a discount. To resolve, set them up with a login for the future and direct them to the Sign In button in the top right of your web forms.

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What if someone doesn't receive their discount?

Step 3: If they are registered, check their Web Form Traffic to make sure they were signed in and Altru was tracking their purchase.
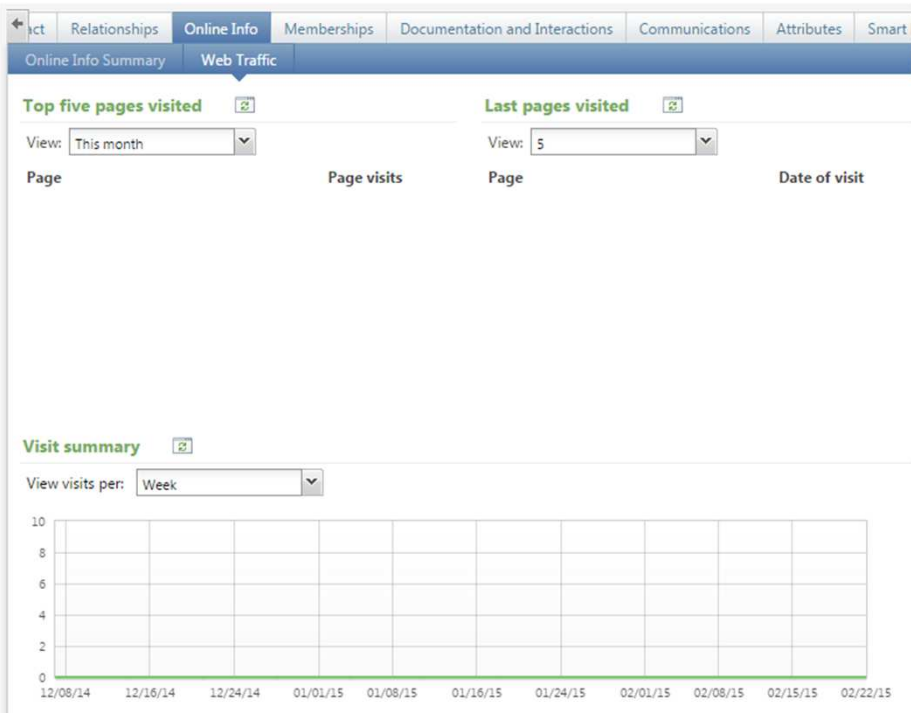
If you do not see anything under Last pages visited, this most likely means they registered for the first time during their purchase or didn't sign in.

If you do see pages here with dates, ensure the date here matches the transaction date of their online purchase.

To resolve, reassure the patron that they are successfully registered and their discount should apply in the future as long as they are signed in.

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What if someone doesn't receive their discount?

Step 4: Check Discount Set Up. If your organization is using multiple price types (for example Member or Adult), be sure that the patron purchased the price type that was eligible for discount.

If you have a discount set up that only applies a discount to a Member price type and the patron has purchased the Adult price type instead, you can resolve this by including the Adult price type in your discount or by reminding your patron to purchase the Member price type.

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Questions?

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