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User Registration

User Registration is a tool that Altru uses to match constituent records in the database to patrons making online purchases. By registering for and signing in to your website, Altru recognizes the patron and will:
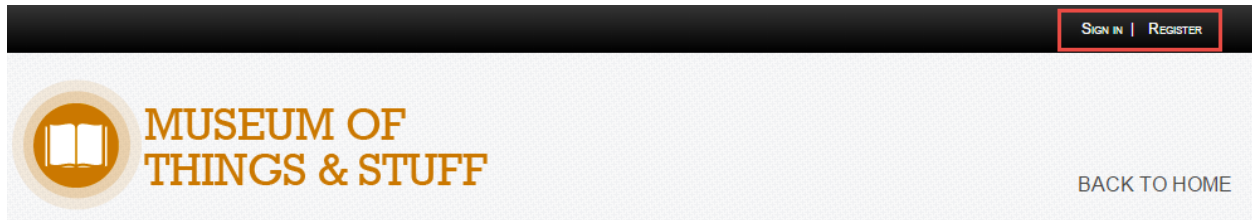
- Automatically fill in personal information such as address, phone, e-mail address, etc.
- Automatically apply discounts for which the patron is eligible (for example, member discounts)
- Add the order to the constituent record once complete, therefore preventing potential duplicate constituent records.
- You can see which web form pages your patrons have visited from the Online Information Tab of their constituent record.

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Two Ways to Register

There are two ways that patrons can register for your website:

1. Use the Register/Sign In button in the top left of any Altru web form:

2. Register during the purchase on the personal information page.

IMPORTANT NOTE: If a patron registers this way, they will **not** receive any discounts they are eligible for on their first order. This is because Altru matches the Personal Information to existing constituent records in the database *after* the order is complete.

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If a patron doesn't receive their member discount…

If you notice that a member has made a purchase online and did not receive the discount, there are four likely reasons:

1. The Member was not Registered or Signed In to the website.
2. A duplicate constituent was created
3. The Member Registered during their purchase and therefore Altru was unable to match their website registration to their constituent record until *after* the order was complete.
4. The Member did not purchase the Member price type during the order.

Follow these steps to ensure that the member's user registration account is set up correctly for the future.

STEP 1: CHECK FOR DUPLICATE CONSTITUENTS

1. Go to Constituents, **Constituent Search**
2. Search for the Constituent
3. If you see multiple results, it is possible that when the member registered, their registration information did not match closely to their existing constituent record. Altru would then therefore create a new constituent.
4. Merge the two constituents through Constituents, Duplicates, **Merge two constituents**

NOTE: You can also edit the Constituent Matching Settings under **Administration > Constituent Matching Settings**. As a precautionary measure, if you are lowering the match percentage do this slowly so Altru doesn't match the registration with an incorrect record.

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STEP 2: CHECK TO ENSURE THEY HAVE REGISTERED FOR YOUR WEBSITE

1. When you view a constituent record, if the constituent has successfully registered for your website, you will see **Online Info** in their tabs:

2. If you do not see **Online Info**, the constituent is *__NOT__* **registered for the website**.

3. (Optional) You may want to consider registering them for the website on your end, so they have a login for future use. Provide them with a password and instruct them to use the Sign In button in the top of the screen during their next purchase.

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STEP 3: CHECK TO SEE IF THEY REGISTERED DURING THEIR PURCHASE

As noted above, constituents can also register during their purchase. While this is great for patrons to create an account for future purchases, Altru cannot match the user registration to the existing constituent record in the database before the order is complete. Therefore, the constituent will not receive any discounts they are eligible for according to their constituent record.

1. On the Constituent record, click the **Online info** tab:

2. If they patron registered during their purchase, they would not have any information under **Web Traffic**. Altru wasn't tracking the pages the user visited since the registreation wasn't created until the order was complete:

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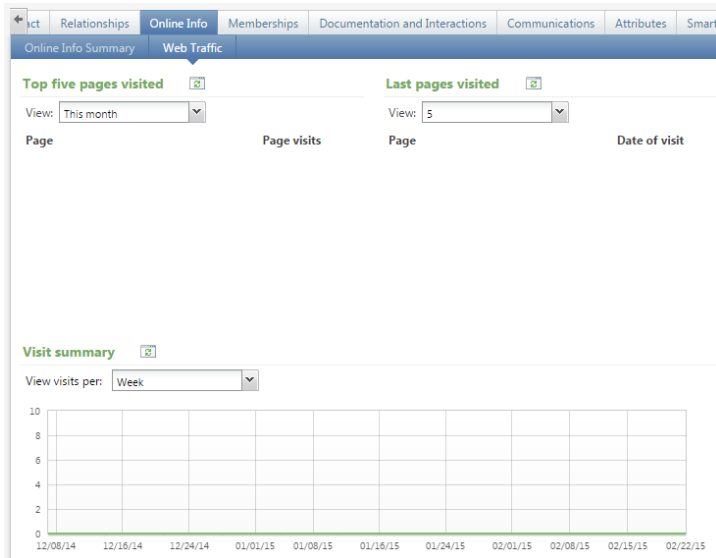
3. If this is the case, no further action is needed. The patron should be all set to use their existing username and password going forward. If necessary, perform a refund to return the funds to the patron.

4. If you do see that the patron was both registered and they had pages visited under Web Traffic (pictured below) proceed to the next step:

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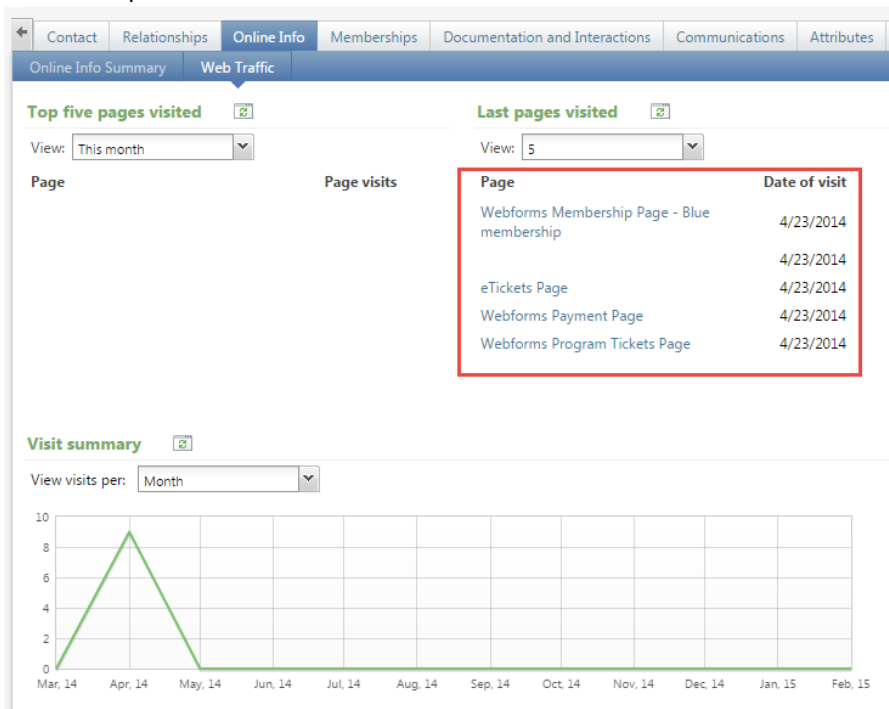
STEP 4: CHECK TO SEE THAT THE PATRON WAS SIGNED IN DURING THEIR PURCHASE

1. On the **Online Info** tab**,** ensure that the Last login date and the Date of Visit matches the transaction date of their online purchase:

2. **If the date does not match their transaction date, the patron was not signed in during the transaction**. No further action is needed, but you will want to kindly remind the patron to sign in to the website the future using the Sign in button to receive their discount.

3. If their last login and Date of visit dates do match the transaction date, proceed to the next step.

STEP 5: CHECK TO MAKE SURE THE PATRON PURCHASED THE CORRECT PRICE TYPE

1. On the Constituent record, go to the **Sales Orders** Tab.
2. Click the Order Number to go to the Order
3. On the Order Details Tab, make sure the price type they selected during their purchase is eligible for the discount:

4. You will either need to remind the patron to purchase the Member Price Type or edit your discount to include the price type that members are purchasing.