

## 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:

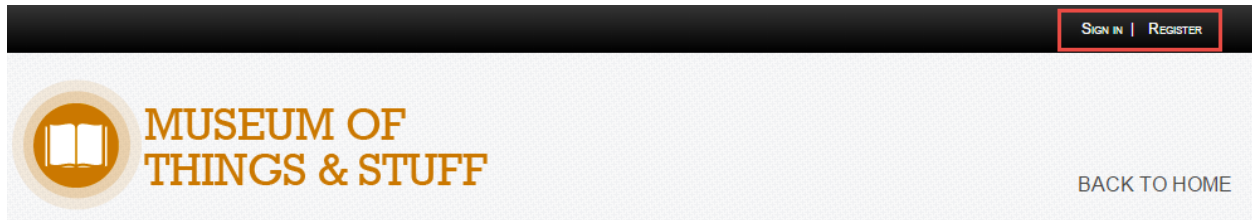
- Automatically fill in personal information such as address, phone, e-mail address, etc.
- Automatically apply discounts for which the patron is eligible (for example, member discounts)
- Add the order to the constituent record once complete, therefore preventing potential duplicate constituent records.
- You can see which web form pages your patrons have visited from the Online Information Tab of their constituent record.



## 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.

Total: \$30.00

Discount code:

Personal Information

Title:

First name:  \*

Last name:  \*

Country:

Address:  \*

City:  \*

State:  \*

ZIP:  \*

Phone:

Email:  \*

Use this as my billing address

Registration Information

To register with our organization, please select the checkbox and enter a password. **After you register, you are eligible for any perks that we offer to users.** When you sign in, the site prepopulates forms with your information.

Register for site

Username: *The site uses your email address to identify you.*

Password:  *Enter a case-sensitive password with at least 7 characters.*

Confirm password:

**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.

### 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**

**Constituent Search by Name or Lookup ID**

Name/Lookup ID:  Address:

Last/Org/Group name:  City:

First name:  State:

Lookup ID:  ZIP:

Email address:

Match all criteria exactly

Show advanced search options

**Results (2 records found)**

| Lookup ID  | Name            | Constituent type | Address  | City        | State          | ZIP   |
|------------|-----------------|------------------|----------|-------------|----------------|-------|
| 8-10001170 | Seklecki, Jamie | Individual       | 8 Edw... | Southampton | Massachusetts  | 01073 |
| 8-10001173 | Seklecki, Jamie | Individual       | 2000 ... | Charleston  | South Carolina | 29492 |

**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.

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

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

**Rachel A. Seklecki**  
 Notifications: "Board Member", "People with pending interactions", and "Pet". Click here for more information.

**Individual**    Lookup ID: **8-10001073**

Constituencies: Major donor   Event registrant   Fundraiser   Major giving prospect   Member   Patron   Recognized donor   Staff   Altru   Employees

**Personal Information**    **Contact Information**    **Addresses** (1 of 7)    **Primary Relationships**

Ms. Rachel Ann Seklecki  
 Nickname:    Maiden:

Primary phone: +1 (843) 654-3217 (Business)  
 Primary email: Rachel.Seklecki@blackbaud.com (Busi...)

12345 Main Street  
 Mt. Pleasant, SC 29464  
 Home (Current)

Spouse: Greg Nigro  
 Household: Rachel Seklecki and Greg Nigro  
 Primary business: Blackbaud

**Documentation and Interactions**    **Memberships** (1 of 14)

Notes: 1    Media links: 0    Attachments: 0    Interactions: 8

Contributions Based Membership  
 Rachel A. Seklecki  
 ID: 8-10001180    Status: Active  
 Expiration: 10/9/2015  
 Level: Level 2  
 Member since: 2/13/2014

↑ Show less

relationships   Memberships   Documentation and Interactions   Communications   Attributes   Smart Fields   Security   History   Events   **Online Info**   Education

**Revenue summary**    View all revenue    **Recent revenue**

|                          |             |           |          |            |
|--------------------------|-------------|-----------|----------|------------|
| Total revenue:           | \$8,642.00  | 2/17/2015 | Donation | \$50.00    |
| Total household revenue: | \$13,247.00 | 2/12/2015 | Pledge   | \$1,000.00 |

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

**Santa Claus**

**Individual**    Lookup ID: **8-10001894**

Constituencies: Major giving prospect

**Personal Information**    **Contact Information**    **Addresses**    **Primary Relationships**

Mr. Santa Claus  
 Nickname:    Maiden:

Primary phone:    Primary phone  
 Primary email:    Primary email

123 North Pole Ln  
 North Pole, AK 99705  
 (Current)

Spouse: Carol Claus  
 Household: Santa and Carol Claus  
 Primary business:

**Documentation and Interactions**    **Memberships**

Notes: 0    Media links: 0    Attachments: 0    Interactions: 0

ID:    Status:  
 Expiration:  
 Level:  
 Member since:

↑ Show less    Customize tiles

Orders   Revenue   Personal Info   Contact   Relationships   Memberships   Documentation and Interactions   Communications   Attributes   Smart Fields   Security   History   Education   Prospect

**Revenue summary**    View all revenue    **Recent revenue**

|                          |        |
|--------------------------|--------|
| Total revenue:           | \$0.00 |
| Total household revenue: | \$0.00 |
| Membership revenue:      | \$0.00 |

No Online Info Tab

- (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.



**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:


**Rachel A. Seklecki**

Notifications: "Board Member", "People with pending interactions", and "Pet". Click here for more information

**Individual**    **Lookup ID: 8-10001073**

Constituencies: Major donor   Event registrant   Fundraiser   Major giving prospect   Member   Patron   F

**Personal Information**    **Contact Information**    **Addresses**

 **Ms. Rachel Ann Seklecki**  
 Nickname:    Maiden:

**Primary phone**  
 +1 (843) 654-3217 (Business)

**Primary email**  
 Rachel.Seklecki@blackbaud.com (Busi..)

12345 Main  
 Mt. Pleasant  
 Home (

**Documentation and Interactions**    **Memberships** (1 of 14) ◀ ▶

Notes: 1    + Note  
 Media links: 0    + Media link  
 Attachments: 0    + Attachment  
 Interactions: 8    + Interaction

Contributions Based Membership  
 ✓ Rachel A. Seklecki  
 ID: 8-1001180    Status: Active  
 Expirations: 3/9/2015  
 Level: Level 2  
 Member since: 2/19/2014

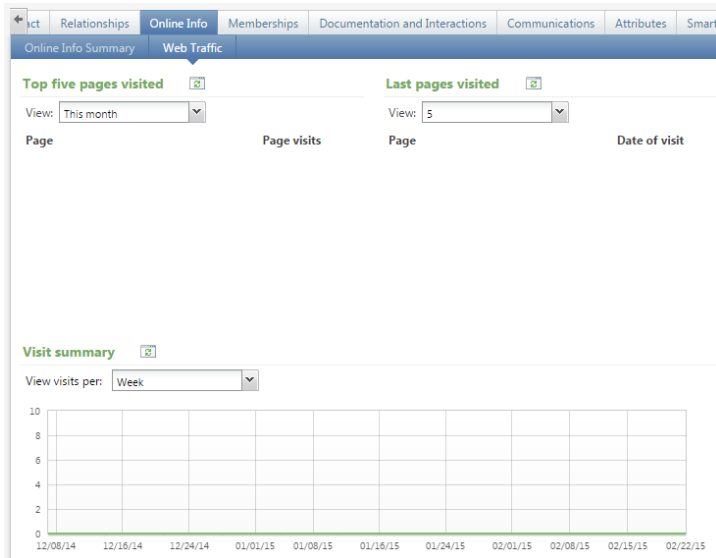
↑ Show less

Summary   Sales Orders   Revenue   Personal Info   Contact   Relationships   **Online Info**

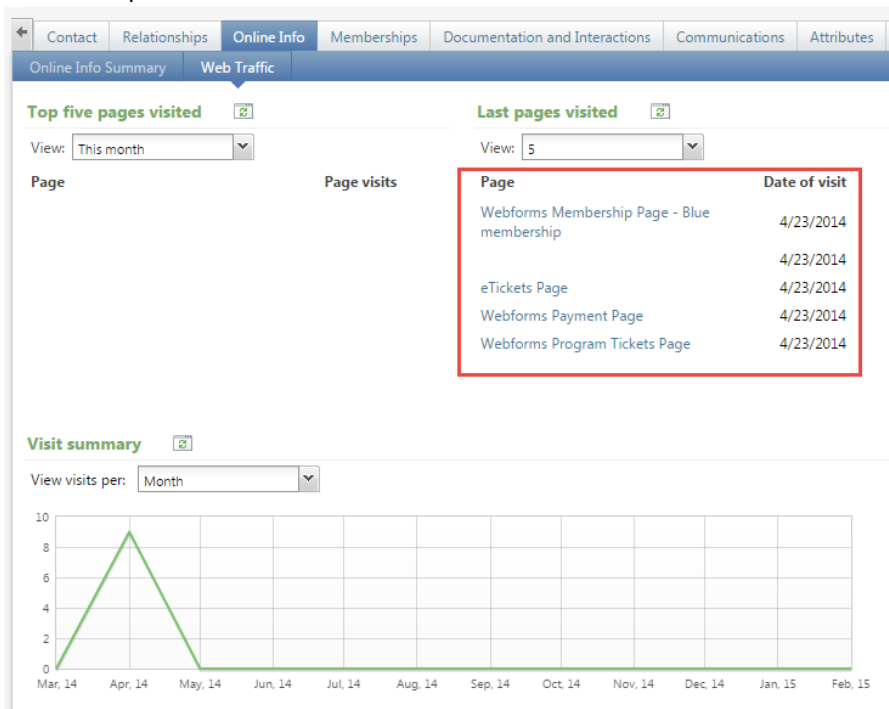
**Revenue summary**    View all revenue

|                          |             |
|--------------------------|-------------|
| Total revenue:           | \$8,642.00  |
| Total household revenue: | \$13,247.00 |
| Membership revenue:      | \$1,394.00  |

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 registration wasn't created until the order was complete:



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:



**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:

The screenshot shows two parts of the Blackbaud interface. The top part is the 'Online Info Summary' for a user with the email Raem1010@comcast.net. The 'Last login' date is highlighted in yellow as 4/18/2012 2:41:05 PM. The bottom part shows 'Web Traffic' data, with the 'Last pages visited' table highlighting the 'Webforms Payment Page' visited on 7/25/2012.

| Page                  | Date of visit |
|-----------------------|---------------|
| Webforms Payment Page | 7/25/2012     |
| Webforms Payment Page | 7/25/2012     |

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:

The screenshot shows the 'Order Details' tab with a table of tickets. One ticket is listed as 'Adult - Admission' with a quantity of 1 and a price of \$3.00. The text 'Adult - Admission' is highlighted with a red box.

| Name              | Date | Time | Quantity | Price  |
|-------------------|------|------|----------|--------|
| Adult - Admission |      |      | 1        | \$3.00 |

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.