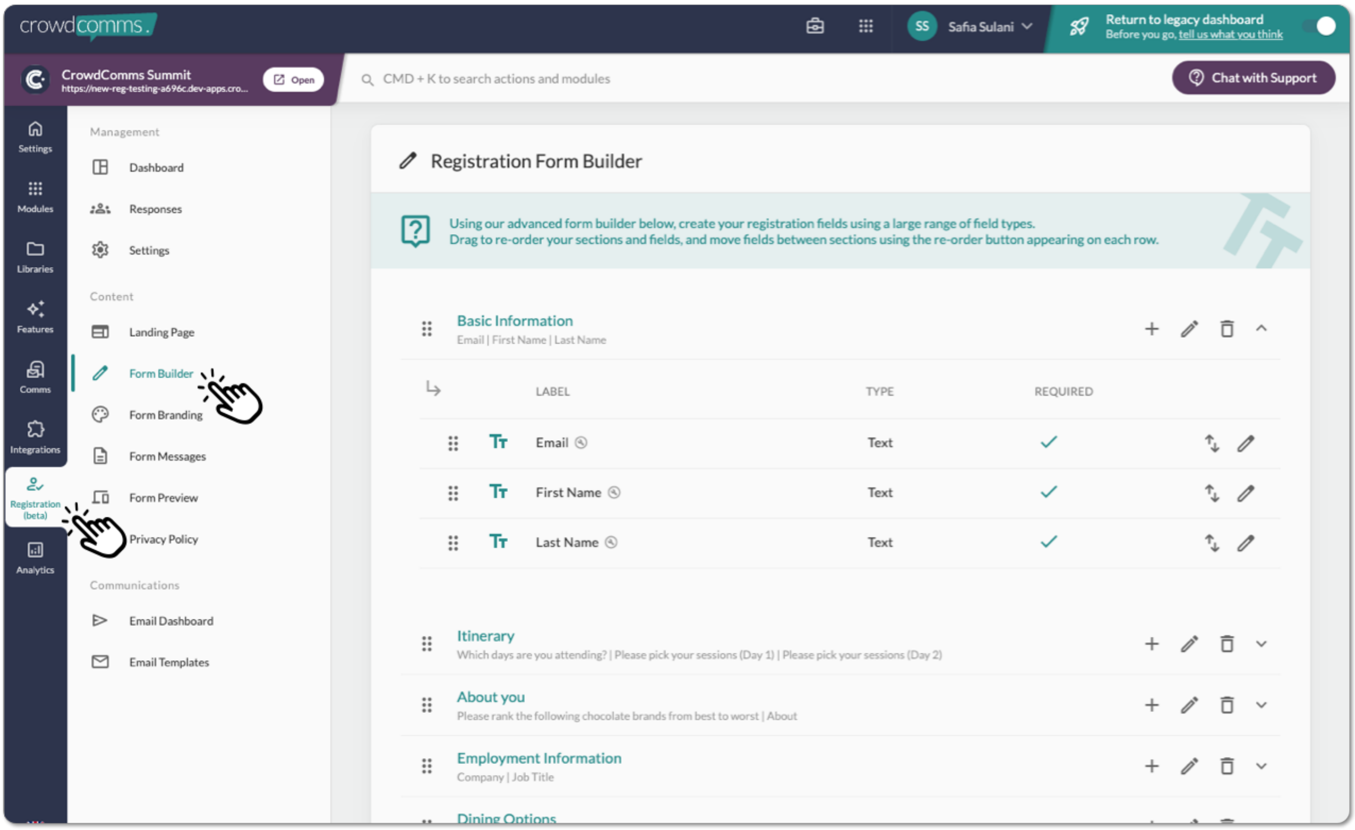
Building the Registration Form

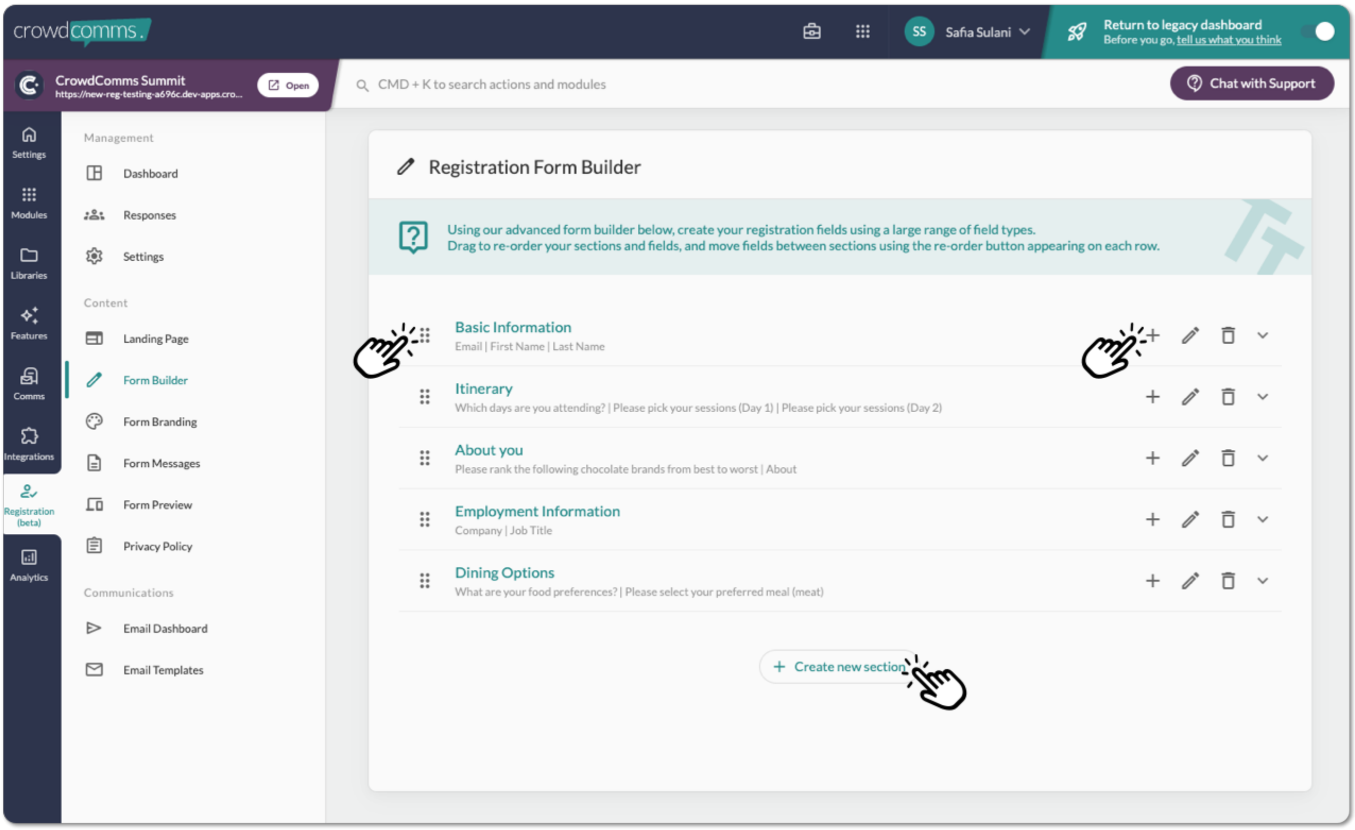
Default Section & Icons functions

To start creating the registration form, navigate to the Registration tab. Then, within the Content section on the secondary menu, click ‘Form Builder’.



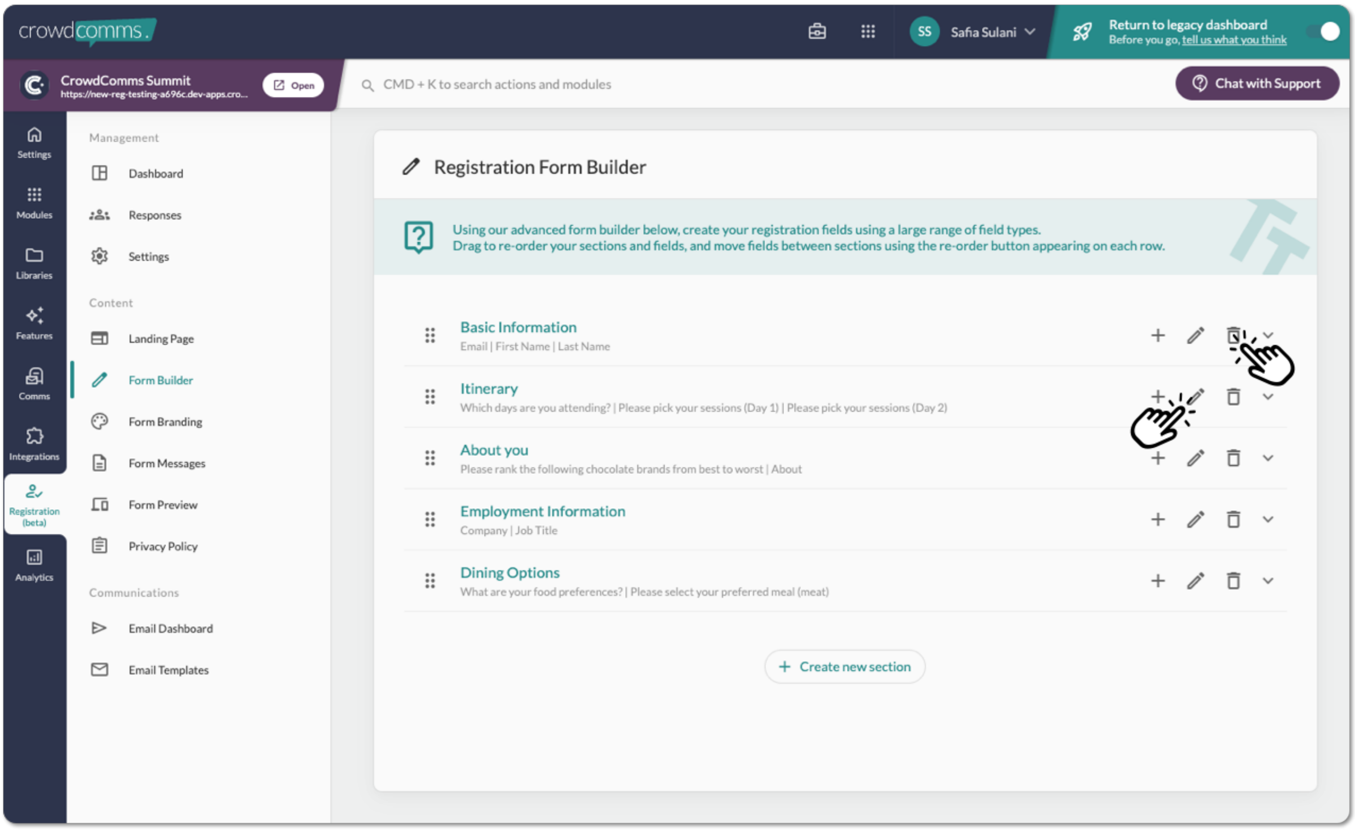
On this page, you will see the Basic Information section. This is a default section that enables the registrant to add their email, first and last names.

You can add additional fields to a section by clicking on the ‘+’ icon. To learn how to add a new registration field, click here. You can also add more sections to your form, by clicking on the 'Create new section' button as shown below.

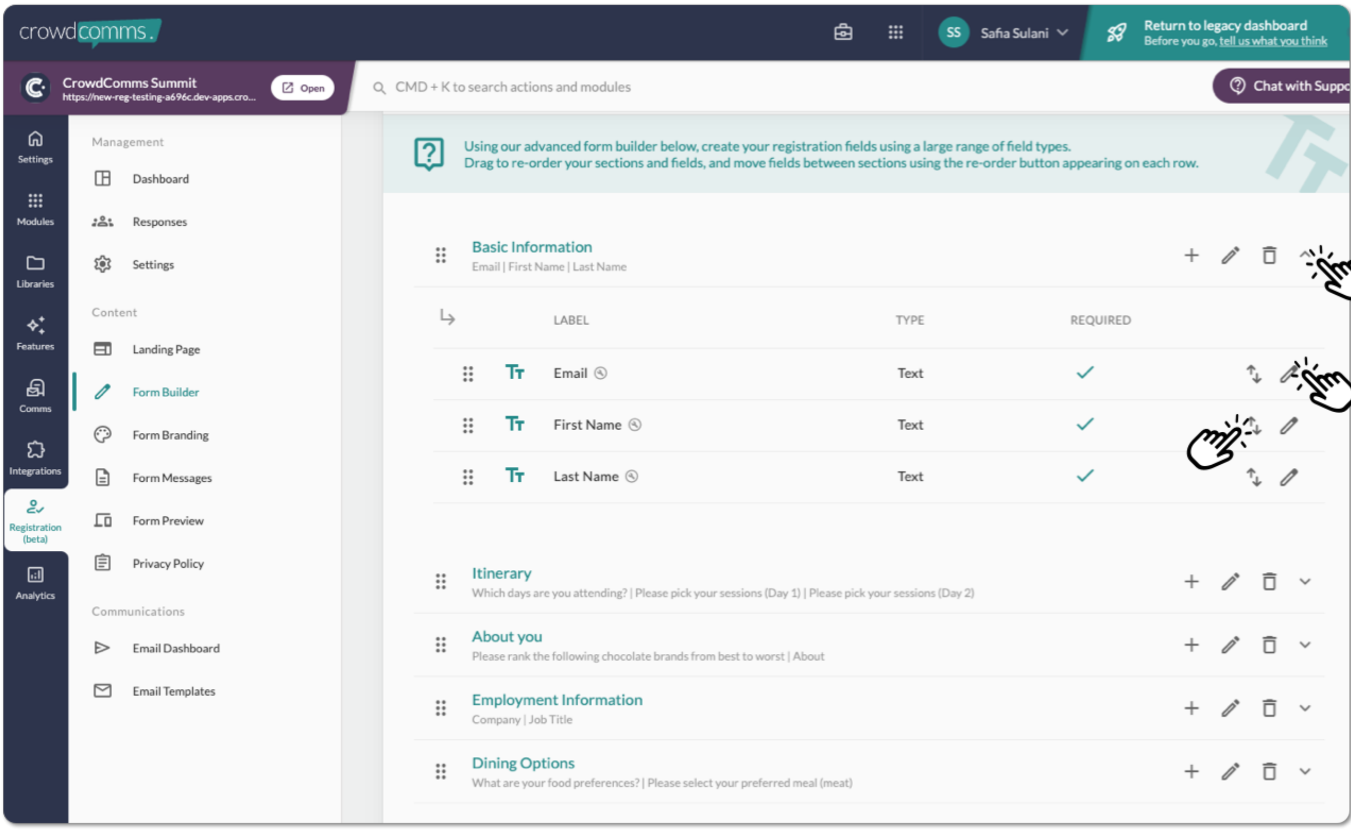


You can also delete a section by clicking on the ‘Bin’ icon. If you want to edit the section details click on the ‘Pencil’ icon.6.

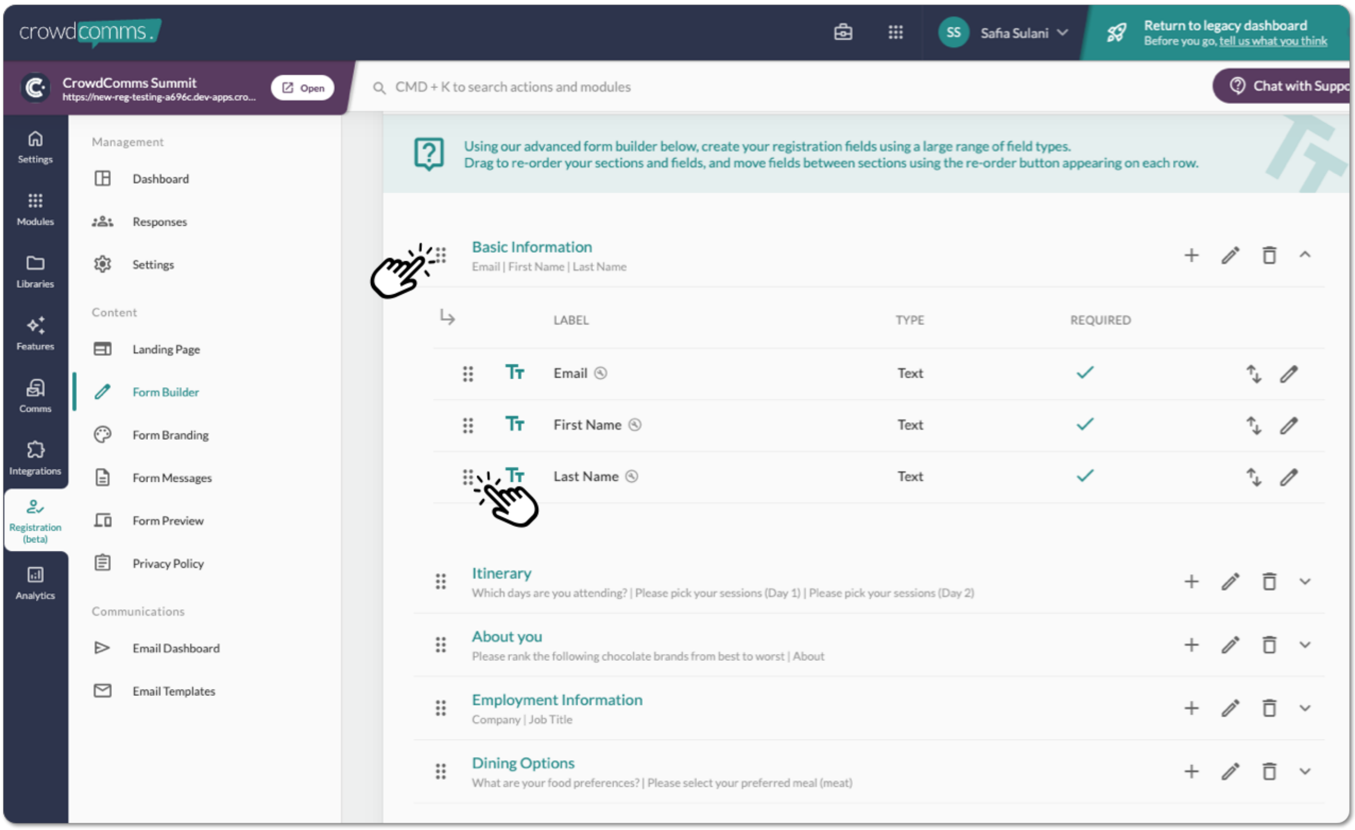
When editing the section, you can edit the Section Title and the Icon, add People Group to restrict the visibility of this field to specific people groups, as well as add a description to the section.



If you click on the ‘v’ icon, the section will expand and display the list of fields you have added for that section. To edit the field, click on the ‘Pencil’ icon. You can also move the field into another section by clicking on the ‘Double Arrows’.



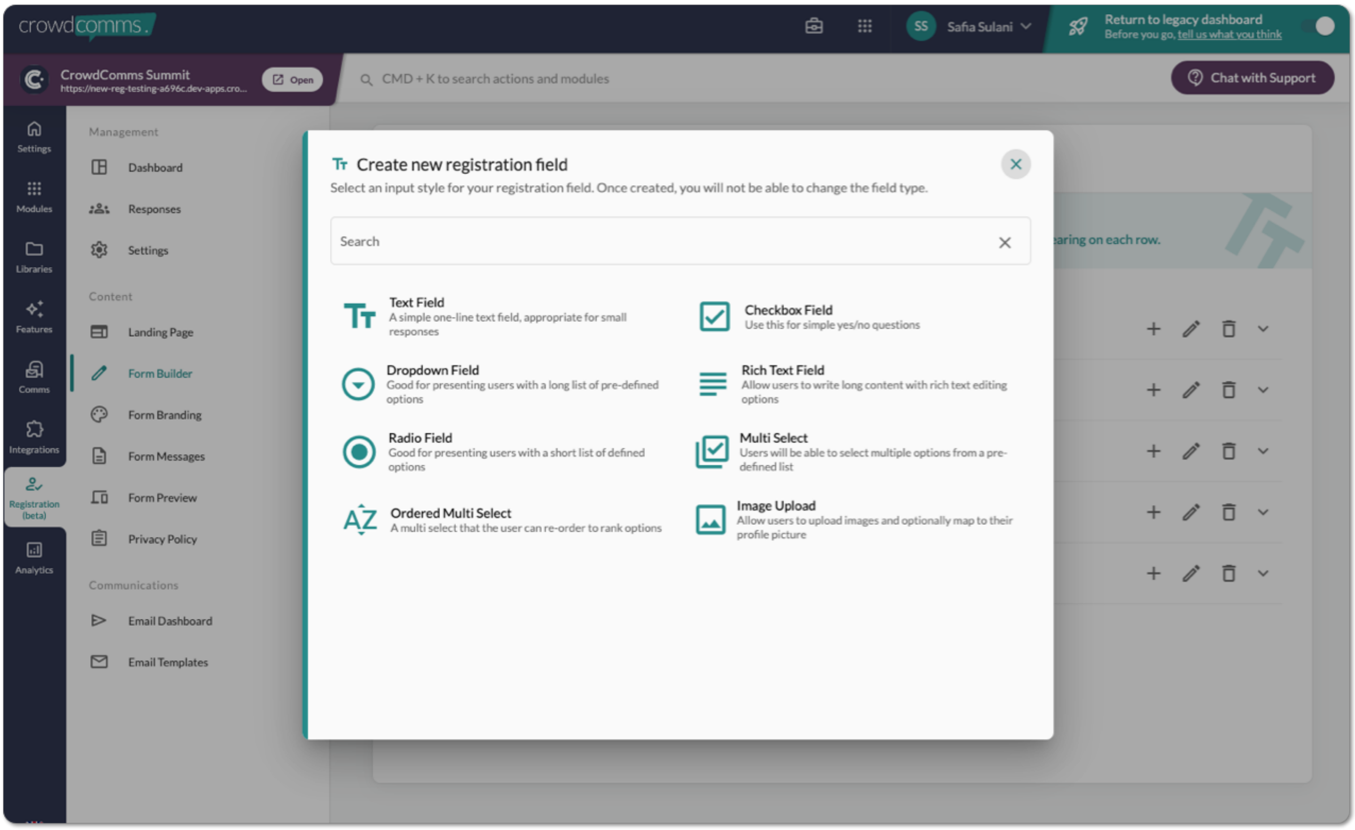
Finally, to re-order the field or the section, click, hold, and drag the field or section.



Field Options

There are different options of field types you can add to the registration form, and they are:

1. **Text field** – This is a simple one-line text field which is appropriate for small responses.
2. **Checkbox field** – This field can be used for simple yes or no questions.
3. **Dropdown field** – This field is useful to present users with a long list of predefined options.
4. **Rich Text field** – This field will allow users to write longer content with rich text editing options.
5. **Radio field** – This field is useful to present users with a short list of defined options.
6. **Multi-select field** – Similar to the checkbox, but allows users to select multiple options from a predefined list.



In the following section of this guide, you will see all the configurations for all these different fields. However, there may be some overlaps in their functionality.

Text field

When you select this option, you will be presented with the configuration dialog.

On this dialog, you will see four tabs, and they are:

1. Setup – Where you add the label name for the field and an optional short description.
2. Validation – You can opt to make this field mandatory or optional and set the maximum and minimum length of the text the users can enter.
3. Connect – You can map the current field to either the Profile or a Custom field in CrowdComms.

   > Please remember that if you want to connect the response in the form to a custom field, you must first add the custom field in the People's profile setting.

4. Visibility – You can customise this tab to configure when to show or hide this current field based on the user's response to other fields, as well as add People Group to restrict the visibility of this field to specific people groups. Please refer here for explanations of how to configure this tab.

Once you're happy with the text field configuration, click 'Submit'.

Visibility (All fields)

i. There are a few ways to use this Visibility configuration. The simplest one is if you want to show or hide the current field based on the user's response to a previous field, as well as add People Group to restrict the visibility of this field to specific people groups.

ii. For example, you can decide to show or hide a checkbox question based on the answer provided in the previous field(s) of the registration form.

iii. Say you want to ask a follow-up question, 'Do you ride to work?' to users who have responded Yes to having a bicycle. You can add a configuration for the current field to only appear for those users who have answered Yes. And not to appear for users who answered No.

iv. You can also configure the current field to check multiple other previous fields before it shows/hides the current field based on the user's responses.

v. As an example, if your current field asks the users if they ride to work, you may want to check if your users have answered True in some of the other previous fields, such as, if they 'Own a bicycle' or if they 'Work from an office'.

vi. If you want the current field to only show if the users have answered all of the relevant questions with True, then select 'When all the following are true' from the Select Logic dropdown.

vii. But, if you want at least one of the relevant fields to have been answered True, then select 'When some of the following are true' from Select logic the dropdown options.

viii. You don't need to create the opposite response configuration, i.e. 'Hide this field' if the users responded to not having a bicycle.

ix. On Select Logic, there are 2 options available. If you have one or multiple fields you want to check for this configuration, select 'When all the following are true'.

x. For this logic, the system will look for all the relevant fields you've configured and check that the users have answered True on all of them.

xi. The other option is if you have multiple fields and you want the system to check that your users have answered 'Yes' to at least one of them, select 'When some of the following are true' from the dropdown option.

xii. What this will do is, if you have 2 questions which you have configured with this current field, the system will look at whether at least one of the answers is True, and if so, the current field will appear to the user.

xiii. The next step is to add the visibility Conditions. On this table you will need to add all the field(s) you want the configurations to check.

xiv. Click on the '+ Add' button and another dialog will appear. You must ensure that the field already exists in the registration form.

xv. On the dialog, select the Field, Comparison and/or the Value. Please note that depending on the field type, some of the dropdowns may not be applicable to the configuration. Such as for the Text Field type, you won't need to add the Value.

xvi. If you want to add more fields to the current field's configuration, repeat steps ix – xii.

Checkbox field

The next field that you can choose is the Checkbox field. Use this field if you want to ask a simple yes or no question.

It is best to write your question in the form of a statement, such as 'I need accommodation'.

When you select this option, you will be presented with the configuration dialog.

On this dialog, you can see four tabs:

1. Setup – Where you add the label name for the field and an optional short description.
2. Validation – You can opt to make this field mandatory or optional.
3. Connect – You can map the current field to either the Profile or the Custom field in the CrowdComms People's list. In addition, you can also add the user to a session or a group based on their answer. Further explanation on how to configure this field can be found below.
4. Visibility – You can customise this tab to configure when to show or hide this current field based on the user's response to other fields, as well as add People Group to restrict the visibility of this field to specific people groups. Please refer here for explanations of how to configure this tab.

Connect (Checkbox field)

i. There are a few ways to configure the Connect tab. The straightforward way is to map the current field to either the Profile or the Custom field in CrowdComms People's list.

ii. For example, if add in the form for users to respond 'I own a bicycle' you can then map their answer to a custom field on the People's profile, provided that you have already created this field before setting up this configuration.

iii. Another way to configure the Connect tab is by using the Conditional Mapping option.

iv. You should opt for Conditional Mapping if you want to add users to a session or a group, based on their answers.

Please note that if you want to conditionally map the users to a session or a group, you must first create the sessions in the Agenda module, or the groups in the People's library.

v. For example, if added in the form for users to respond, 'I own a bicycle'. Depending on their answers, if they select true, you could conditionally map them to a group called 'Cyclists' and add them to the 'Bike Maintenance' session.

Once you're happy with the checkbox field configuration, click 'Submit'.

Dropdown field

This next field is probably the most popular user interface available, the Dropdown field.

You will want to use this field if you want to present the users with a long list of predefined options. For example, asking users for their nationality in the registration form.

When you select this option, you will be presented with the configuration dialog.

On this dialog, you can see four tabs:

1. Setup – Where you add the label name for the field and an optional short description. As well as a list of choices which will appear on the dropdown options.
2. Validation – You can opt to make this field mandatory or optional.
3. Connect – You can map the current field to either the Profile or the Custom field in the CrowdComms People's list. In addition, you can also add the user to a session or a group based on their answer. Please refer here for explanations of how to configure this tab.
4. Visibility – You can customise this tab to configure when to show and hide this current field, based on the user's response to other fields, as well as add People Group to restrict the visibility of this field to specific people groups. Please refer here for explanations of how to configure this tab.

Once you're happy with the dropdown field configuration, click 'Submit'.

Rich Text field

The next field is similar to the text field but allows the user to add longer text and personalise the text using the rich text editor options within their response.

This Rich Text field type will enable the users to customise their answers, for example, you can opt for this type to ask the user to write a bio about themselves.

Users will be able to add bullet points, change the text colour or the text size, add hyperlinks to an external site and many others.

When you select this option, you will be presented with the configuration dialog.

On this dialog you can see the same four tabs as you would from the other field types:

1. Setup – Where you add the label name for the field and an optional short description.
2. Validation – You can opt to make this field mandatory or optional.
3. Connect – You can map the current field to either the Profile or the Custom field in the CrowdComms People's list.
4. Visibility – You can customise this tab to configure when to show and hide this current field, based on the user's response to other fields, as well as add People Group to restrict the visibility of this field to specific people groups. Please refer here for explanations of how to configure this tab.

Once you're happy with the rich text field configuration, click 'Submit'.

Radio field

The next field is the Radio field.

Like the dropdown field, this field is ideal for presenting users with a list of predefined options.

However, instead of a long list of options, you will want to keep the list to short options if you opt for this field. For example, if you want to ask the users their gender, you may want to use the Radio field. On the other hand, if you want to ask for their nationality, it is better to use the Dropdown field.

When you select this option, you will be presented with the configuration dialog.

On this dialog, you can see the same four tabs as you would from other field types, and they are:

1. Setup – Where you add the label name for the field and an optional short description. As well as a list of choices which will appear on the radio options.
2. Validation – You can opt to make this field mandatory or optional.
3. Connect – You can map the current field to either the Profile or the Custom field in the CrowdComms People's list. In addition, you can also add the user to a session, or a group based on their answer. Please refer here for explanations of how to configure this tab.
4. Visibility – You can customise this tab to configure when to show and hide this current field, based on the user's response to other fields, as well as add People Group to restrict

the visibility of this field to specific people groups. Please refer here for explanations of how to configure this tab.

Once you're happy with the radio field configuration, click 'Submit'.

Multi Select field

The next field is the Multi Select field.

This field combines the features of the Checkbox and Radio fields in one.

Say you want the users to pick three of their favourite speakers, you will want to use this field type to present your options.

The users can then make their selections by checking the relevant checkboxes.

When you select this option, you will be presented with the configuration dialog.

On this dialog, you can see the same four tabs as you would from other field types, and they are:

1. Setup – Where you add the label name for the field and an optional short description. As well as a list of choices which will appear on the multi select options.
2. Validation – You can opt to make this field a mandatory or an optional one as well as set the maximum and minimum selections the users are allowed to pick from the list of options. Further explanation on how to configure this field can be found below.
3. Connect – You can map the current field to either the Profile or the Custom field in the CrowdComms People's list. In addition, you can also add the user to a session, or a group based on their answer. Please refer here for explanations of how to configure this tab.
4. Visibility – You can customise this tab to configure when to show and hide this current field, based on the user's response to other fields , as well as add People Group to restrict the visibility of this field to specific people groups. Please refer here for explanations of how to configure this tab.

Validation (Multi Select field)

i. On this tab, you can make the Multi Select field either required or optional. At the same time, configure how many maximum or minimum selections users are allowed to make.
ii. So, if you set the minimum selection as 2 and the maximum as 5 and made the field a required one, the user must select a minimum of 2 from the list of options.
iii. However, if you opt to make the field a required one, you cannot choose 0 on either the maximum or the minimum field.

Once you're happy with the Multi Select field configuration, click 'Submit'.

Ordered Multi Select field

The next field is the Ordered Multi Select and it is identical to the Multi Select field, and it also allows user to rank their selections.

Say you want the users to pick three of their favourite speakers and rank them from the most favourite to their least favourite, you will want to use this field type to present your options and allows the users to make their selections and rank them according to their preference.

When you select this option, you will be presented with the configuration dialog.

On this dialog, you can see the same four tabs as you would from other field types, and they are:

1. Setup – Where you add the label name for the field and an optional short description. As well as a list of choices which will appear on the multi select options.
2. Validation – You can opt to make this field a mandatory or an optional one as well as set the maximum and minimum selections the users are allowed to pick from the list of options. Please refer here for explanations of how to configure this tab.
3. Connect – You can map the current field to either the Profile or the Custom field in the CrowdComms People's list. In addition, you can also add the user to a session, or a group based on their answer. Please refer here for explanations of how to configure this tab.
4. Visibility – You can customise this tab to configure when to show and hide this current field, based on the user's response to other fields, as well as add People Group to restrict the visibility of this field to specific people groups. Please refer here for explanations of how to configure this tab.

Once you're happy with the Ordered Multi Select field configuration, click 'Submit'.

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