# ACTIVE Reserve 4.10 Release Notes

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| Release Date | November 24th, 2022 |
| Release Overview | Custom registration forms |
| Market/Strategic Goals | Product milestones and usability enhancements |
| Target Customers | Lite and Plus Customers |

# Contents

# New features

## Custom registration forms

To collect participant's information when registering for a lesson, agency users (with the account owner, limited staff or system manager role) can now **Create** and customize registration forms in the **Setup** > **Registration forms** tab:
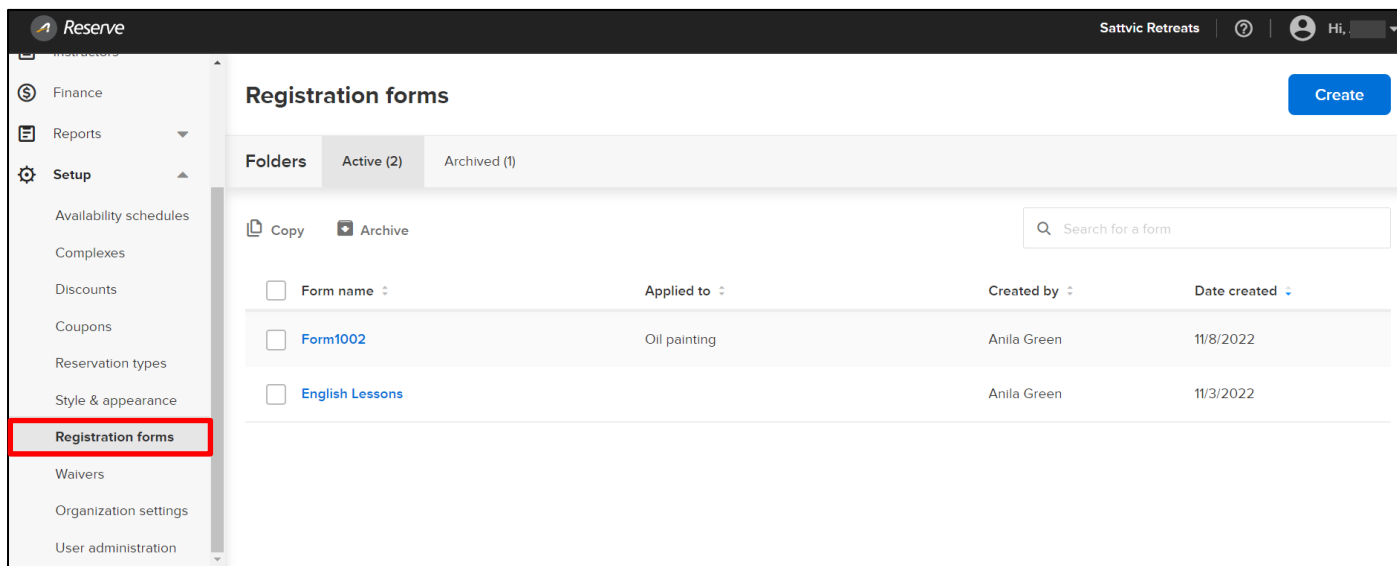


## Create a registration form

To create a new registration form, in the **Registration forms** tab:

1. Click the **Create** button.
2. Enter a unique **Form name** and click **Next**:



3. In the **Digital Form Builder** > **FORM DESIGN** step, drag-and-drop fields as required from the **Fields** tab to the form:

> _**Note**_: You do NOT need to create questions to collect mandatory information, e.g., participants' name or date of birth. For a list of mandatory information that will be collected in registration steps prior to this **Registration form**, see Appendix: Mandatory information in the registration flow.

4. To edit a question's properties, click the question field and then configure its properties in the **Properties** tab:



5. After configuring all the questions, click **Next**.
6. In the **PREVIEW & TEST** step, preview the form in desktop (⬚), tablet (⬚) or mobile phone (⬚) modes and test the form by clicking **Submit**:

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7. To save the form, click **Publish**.

Agency users can also create a registration form by selecting an existing form and clicking **Copy**.

## Apply a registration form to a lesson

To apply a registration form to a lesson, on the **Lessons** > **Create a lesson** or edit ( ✏ ) a lesson page, search for a form by clicking the **Registration form >** ⊕ icon and then select a form (only published forms can be selected to collect the consumer's information):

To change the registration form, click **Edit**.



## Consumers complete a registration form

For a lesson configured with a registration form, on the registration page, consumers can complete the form:

## View registration form answers

Agency users can view/edit the registration form answers for a lesson registration by clicking the **Calendar** > **Lesson view** > a registration > 📄 icon:



To edit the form answer, click **Edit**.

## Archive/unarchive forms

In the **Active** folder, to move active forms to the **Archived** folder (archiving a form will cease to display it in subsequent registrations), select the forms and click **Archive**:



In the **Archived** folder, to move archived forms back to the **Active** folder, select the forms and click **Unarchive** (you must re-select these forms in any lessons which previously used them to display the forms again during registration).



## Appendix: Mandatory information in the registration flow

In the registration flow, the following personal information will be collected in the steps prior to the **Registration form**, so you do NOT need to create questions to collect the following mandatory information:

| (Required fields are marked *) | AUI | CUI |
|---|---|---|
| Adult (self-sign up) | | |
| | *Name | *Name |
| | Date of Birth | *Date of Birth |
| | Gender | |
| | Phone number | *Participant's phone number |
| | *Email | *Email |
| Kid (Less than 18 yrs. old) | | |
| | *Name | *Name |
| | Date of birth | *Date of birth |
| | Gender | |
| | Phone number | |
| | Email | |
| | *Guardian's name | *Guardian's name |

|  | | |
|---|---|---|
|  | Guardian's DOB | |
|  | Guardian's gender | |
|  | Guardian's Phone number | *Guardian's Phone number |
|  | *Guardian's Email | *Guardian's Email |
| **Other Adult** | | |
|  | *Name | *Name |
|  | DOB | *DOB |
|  | Gender | |
|  | Phone number | *Phone number |
|  | *Email | *Email |
|  | *Guardian's Name | *Guardian's Name |
|  | *Guardian's DOB | |
|  | *Guardian's gender | |
|  | *Guardian's phone number | *Guardian's phone number |
|  | *Guardian's email | *Guardian's email |