

Club+ Field Management FAQs

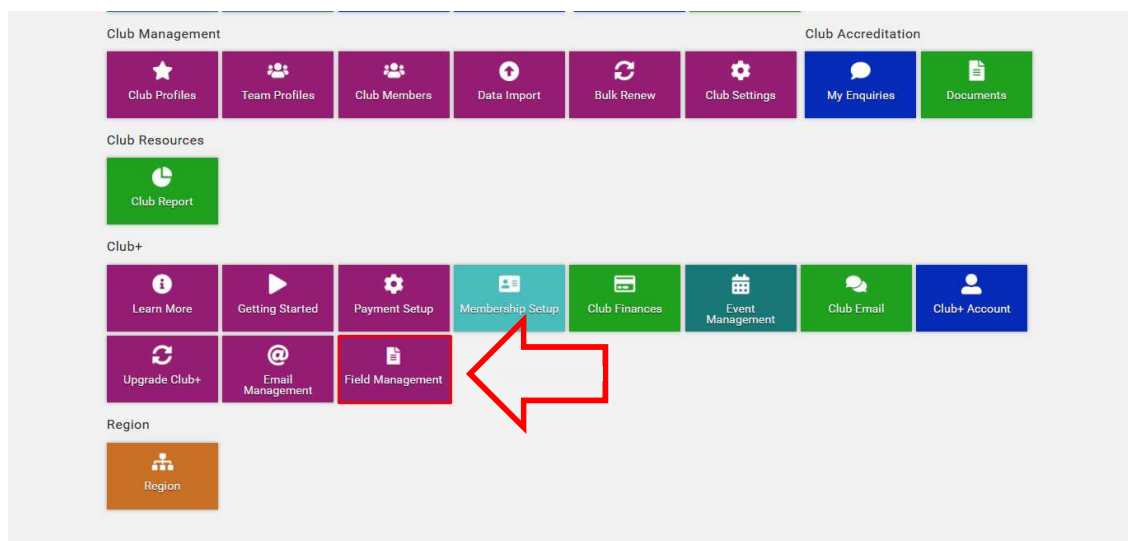
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What is Field Management?

The Field Management feature gives Administrators the capability to gather more data from members, by giving you the ability to add different types of questions to membership forms within GoMembership. Now with v2.5, Field Management has been enhanced and will now allow you to create specific fields to enhance your data capture when creating event tickets. As club admin you will also have the ability to control the visibility of entire forms in the member profile.

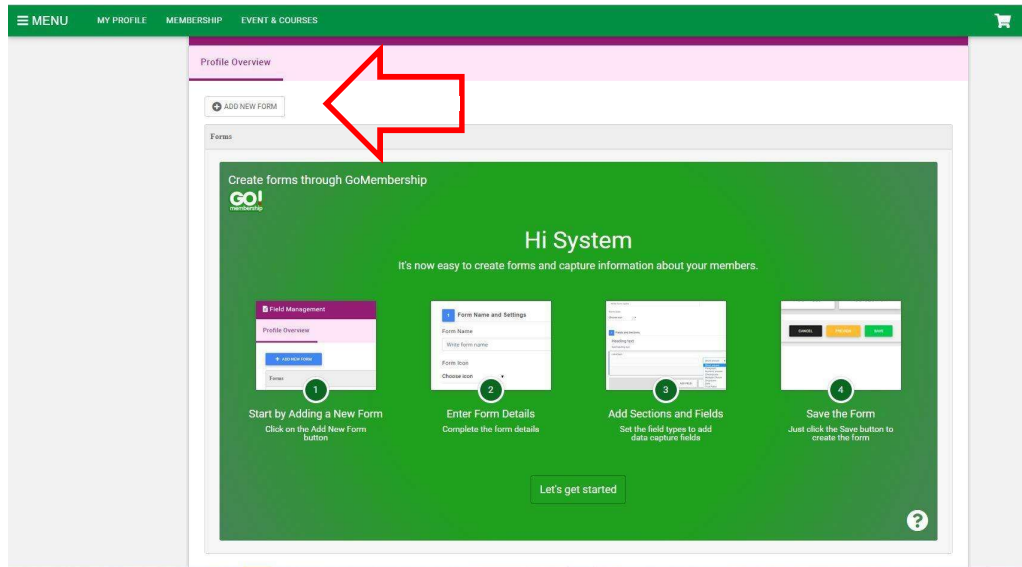
How do I access Field Management?

Once you are logged in, you will find the Field Management tile within the Club+ area of the menu. Click the Field Management tile from either your Home page or via the Menu.

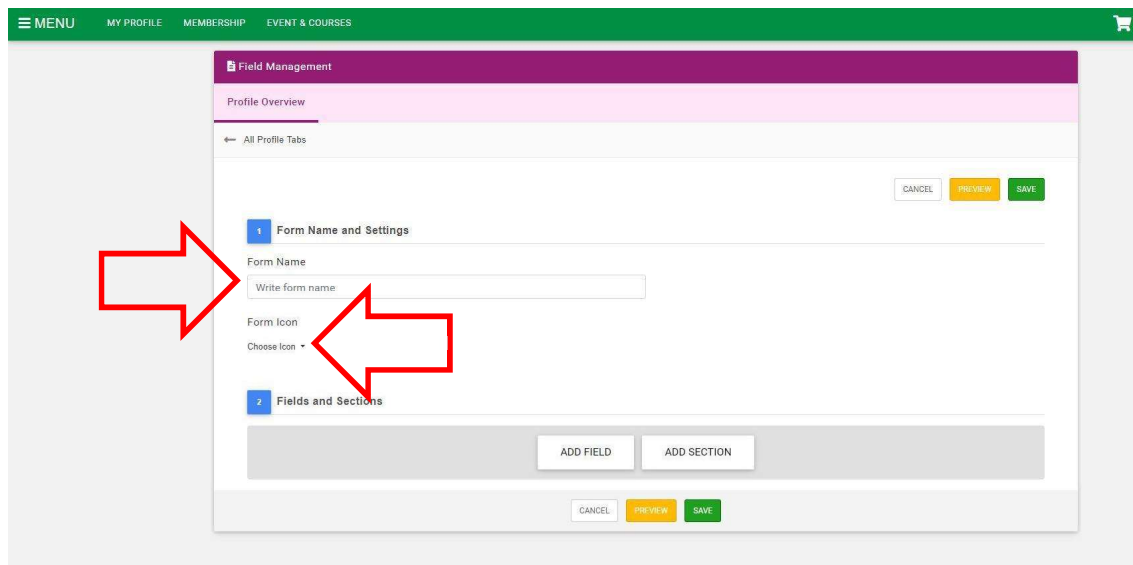


What are Forms?

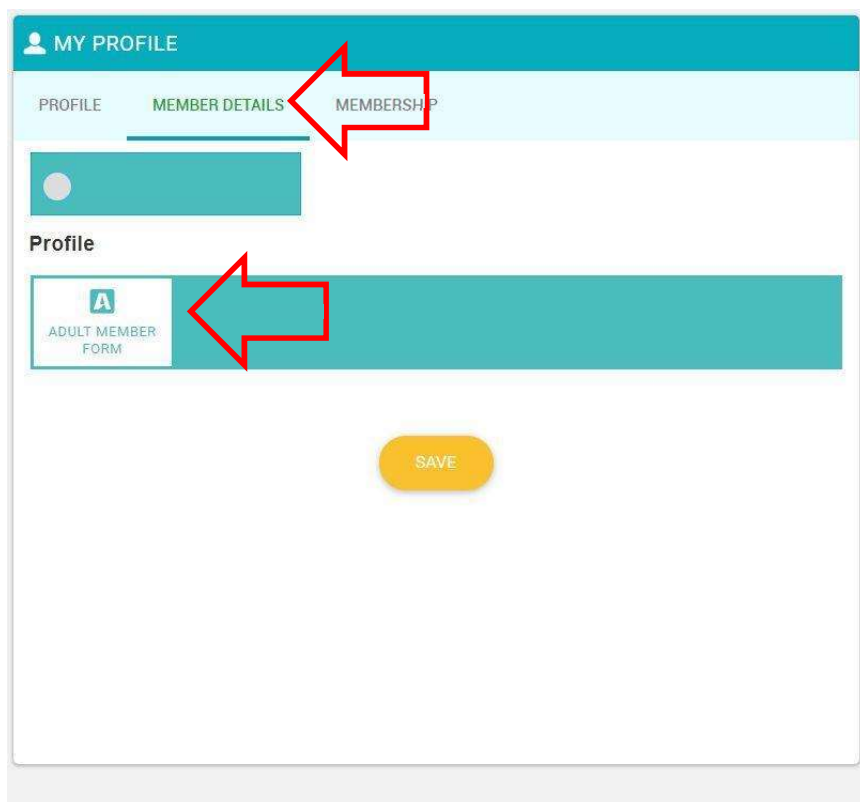
Forms are sets of Fields and Sections. These forms will let you gather more information from your members, for example - playing level, competition experience, personal information. You can create a new Form by clicking on the Add New Form button, indicated by the red arrow below.



Start by giving the Form a name and select an icon to identify it.



The new form will show up under My Profile as Member Details – the example below shows how the Form Name and Icon are displayed.

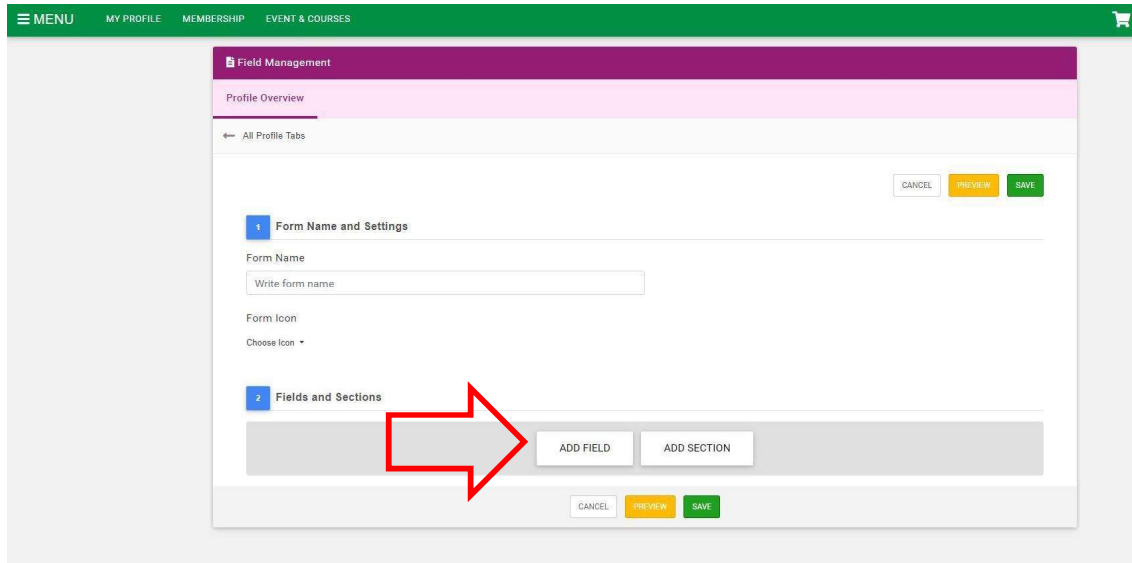


The screenshot displays the 'MY PROFILE' interface. At the top, there's a teal header with a user icon and the text 'MY PROFILE'. Below this, a light blue navigation bar contains three tabs: 'PROFILE', 'MEMBER DETAILS', and 'MEMBERSHIP'. A red arrow points to the 'MEMBER DETAILS' tab. Under the 'MEMBER DETAILS' tab, there's a section titled 'Profile' with a teal background. Inside this section, there's a card labeled 'ADULT MEMBER FORM' with a small icon of a person. A red arrow points to this card. At the bottom of the profile section, there's a yellow 'SAVE' button.

What are Fields?

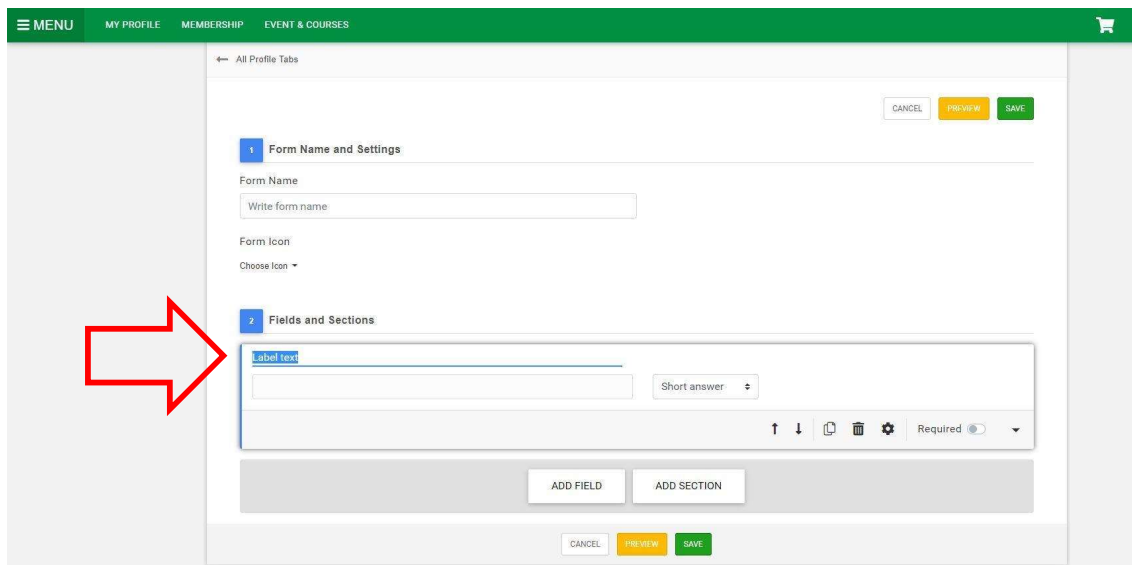
Fields are parts of the form where the members enter data. For example, if you need to know if a member has any allergies, you can add a new Field asking the question.

To add a new Field, click on the Add Field button indicated by the red arrow below.



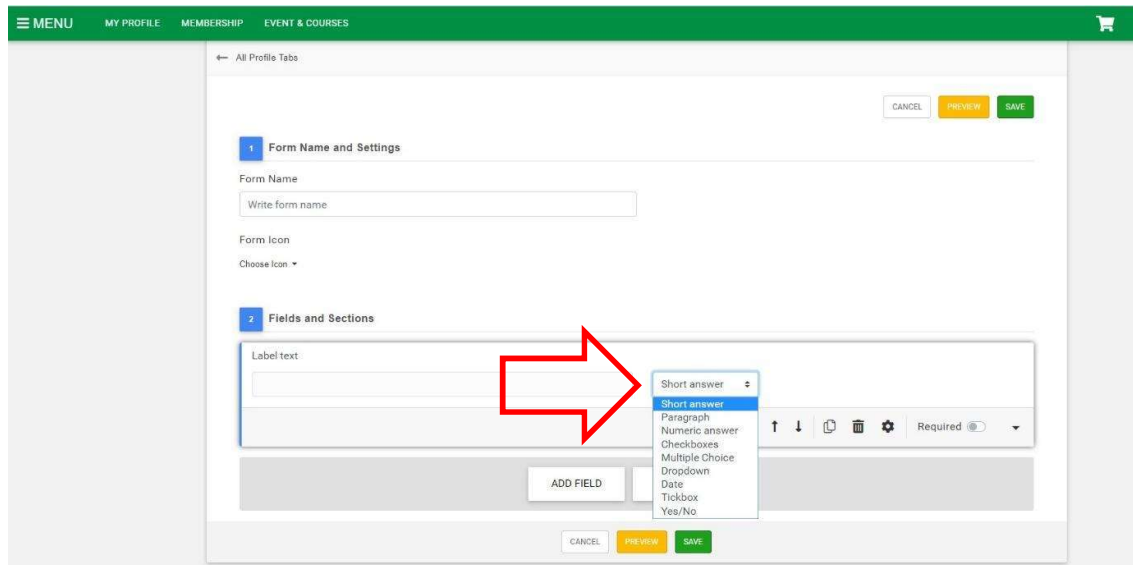
The screenshot shows the 'Field Management' interface with the 'Form Name and Settings' tab selected. The interface includes a 'Form Name' input field, a 'Form Icon' dropdown, and a 'Choose Icon' button. Below these, the 'Fields and Sections' tab is visible, showing a red arrow pointing to the 'ADD FIELD' button. The interface also includes 'CANCEL', 'PREVIEW', and 'SAVE' buttons.

Enter the question you need the answer to, in the area indicated by the red arrow.



The screenshot shows the 'Field Management' interface with the 'Fields and Sections' tab selected. A red arrow points to the 'Label text' input field. The interface also includes a 'Short answer' dropdown, a 'Required' toggle, and 'ADD FIELD' and 'ADD SECTION' buttons. The interface also includes 'CANCEL', 'PREVIEW', and 'SAVE' buttons.

Select the type of Field you want this to be from the dropdown menu, indicated by the red arrow. There is a full description of each Field Type in the next section.

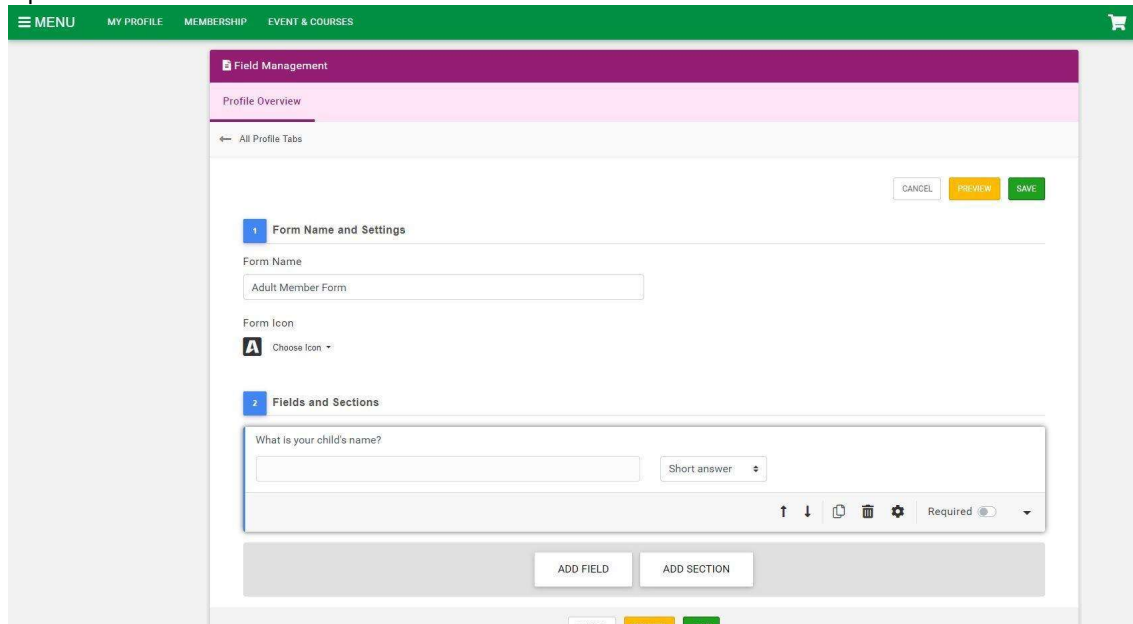


What are the Field Types?

Field types are the type of answers you are expecting from members. A brief description of each follows.

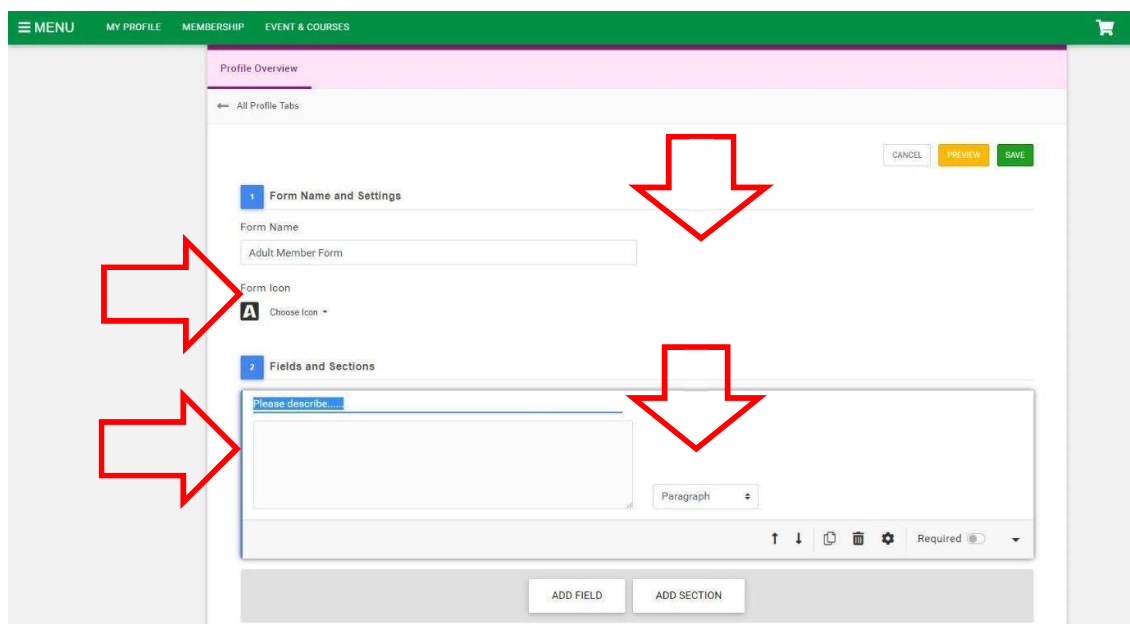
Short Answer

This field is used for short answers consisting of a few words and can accept numeric and alphabetical characters.



Paragraph

This field is used for longer answers and can accept 5000 numeric and/or alphabetical characters.



Profile Overview

← All Profile Tabs

CANCEL PREVIEW SAVE

1 Form Name and Settings

Form Name

Adult Member Form

Form Icon

Choose Icon

2 Fields and Sections

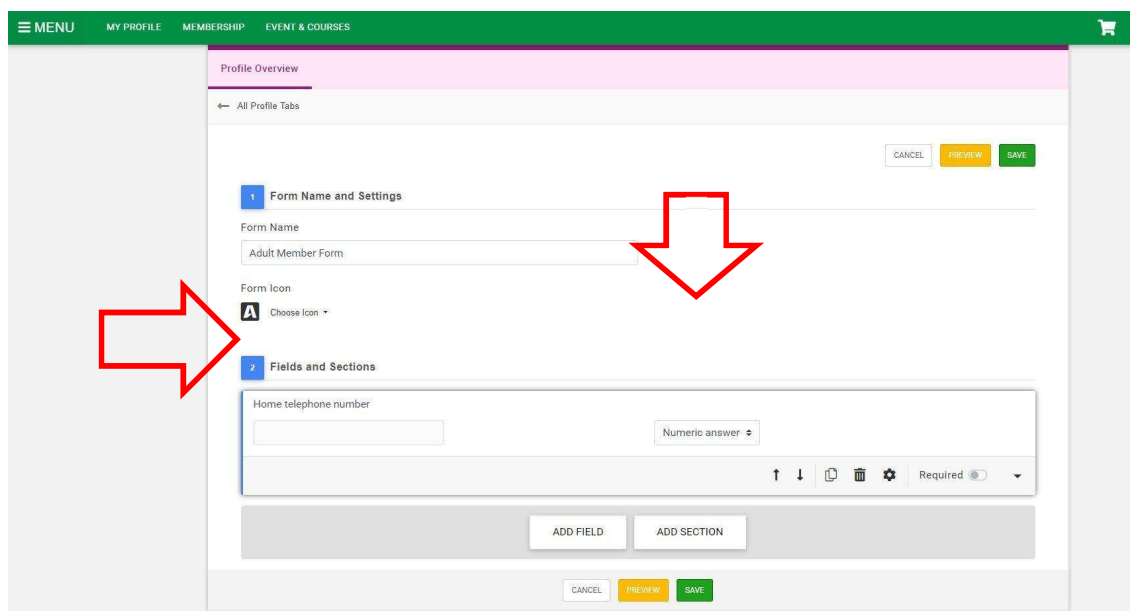
Please describe...

Paragraph

ADD FIELD ADD SECTION

Numeric answer

This field is used for numeric answers only.



Profile Overview

← All Profile Tabs

CANCEL PREVIEW SAVE

1 Form Name and Settings

Form Name

Adult Member Form

Form Icon

Choose Icon

2 Fields and Sections

Home telephone number

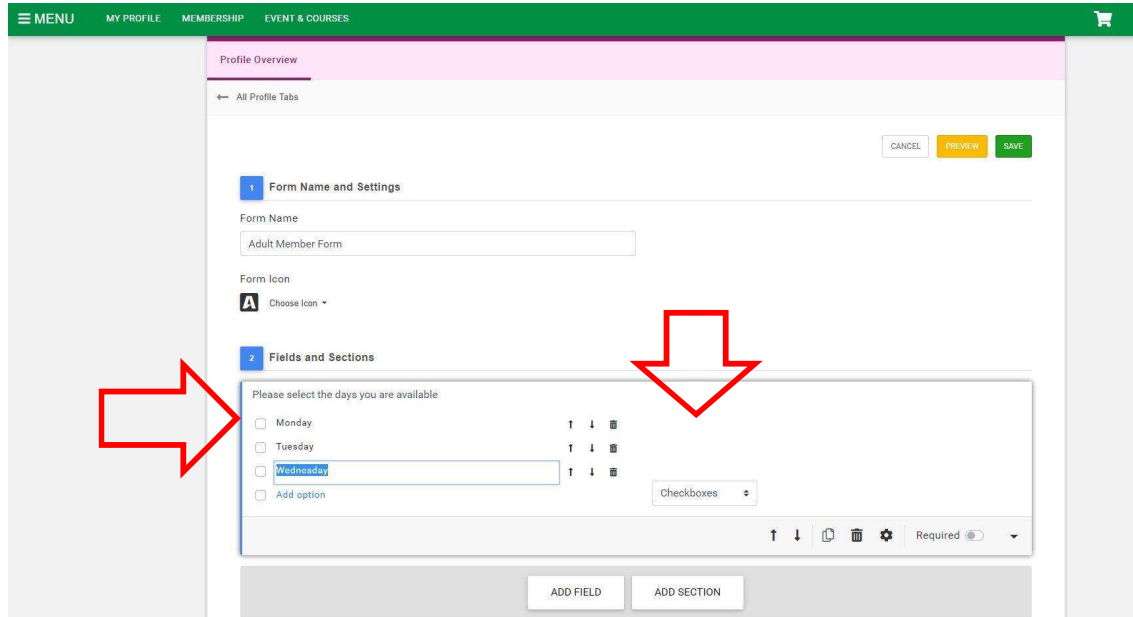
Numeric answer

ADD FIELD ADD SECTION

CANCEL PREVIEW SAVE

Checkboxes

This field is used to allow multiple pre-selected answers. Add in each possible answer.



Form Name and Settings

Form Name: Adult Member Form

Form Icon: Choose Icon

Fields and Sections

Please select the days you are available:

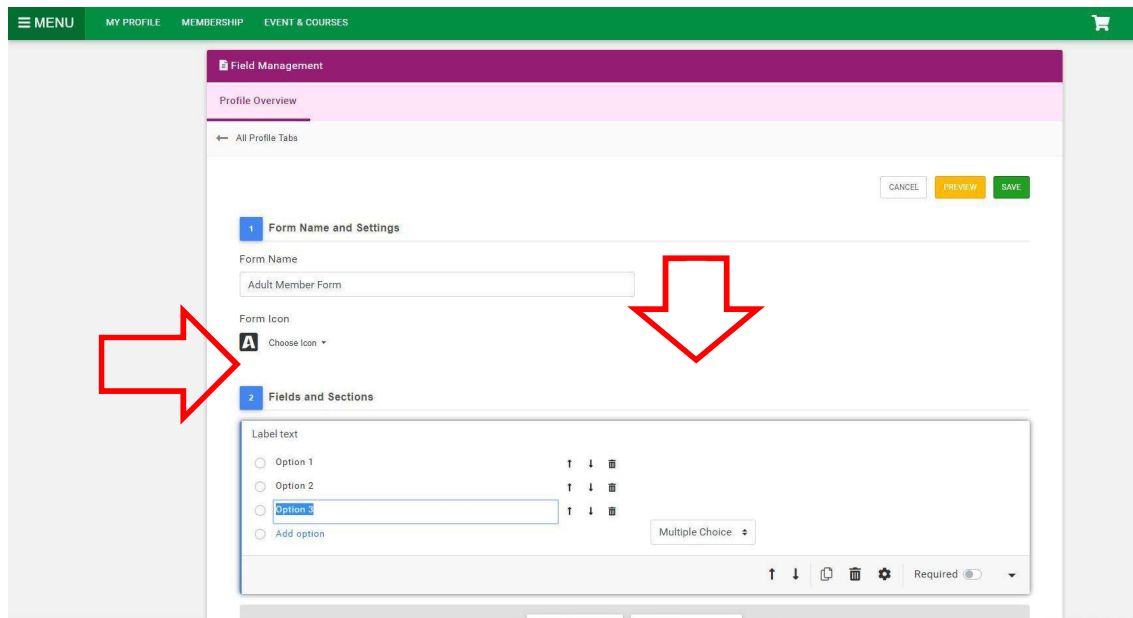
- ☐ Monday
- ☐ Tuesday
- ☒ Wednesday
- ☐ Add option

Checkboxes

ADD FIELD ADD SECTION

Multiple Choice

This field is used to allow one of multiple pre-selected answers. A



Form Name and Settings

Form Name: Adult Member Form

Form Icon: Choose Icon

Fields and Sections

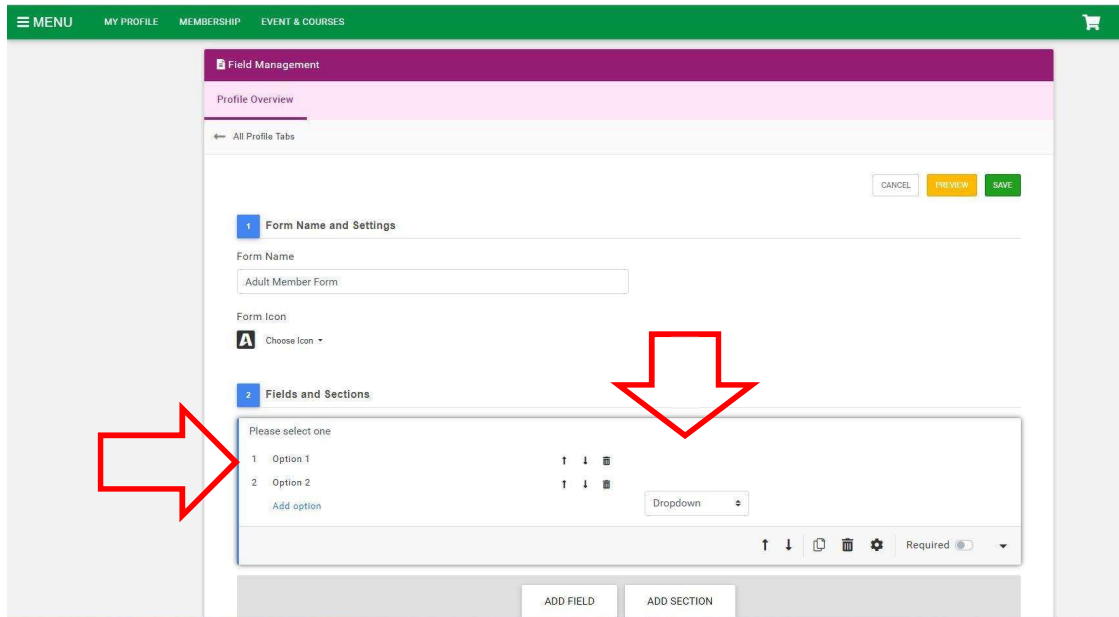
Label text

- ☐ Option 1
- ☐ Option 2
- ☒ Option 3
- ☐ Add option

Multiple Choice

Dropdown

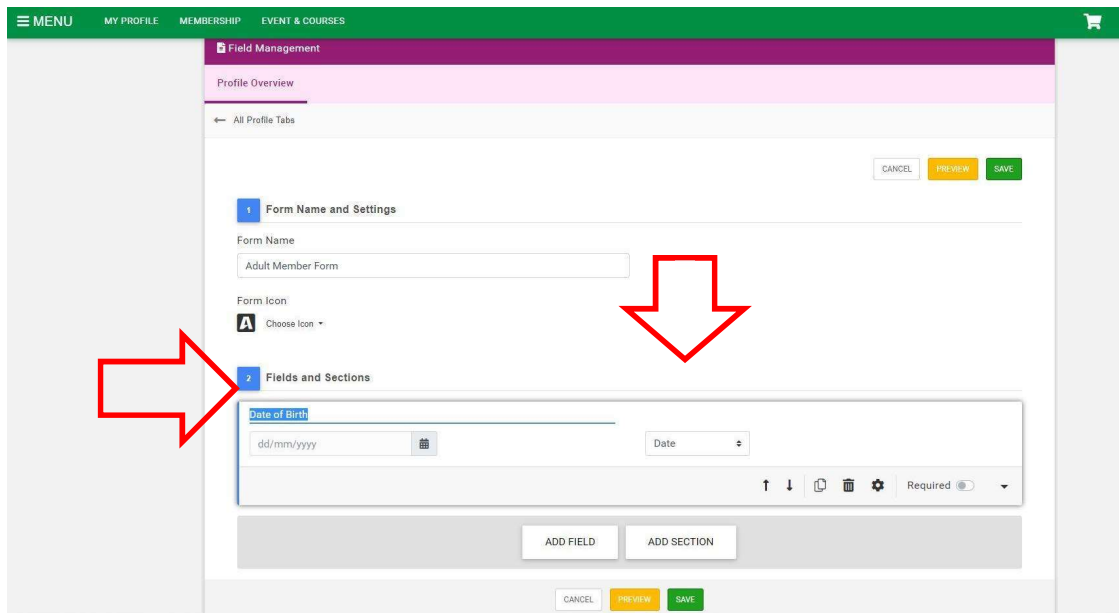
This field is similar to Multiple Choice but instead of showing all the answers, it gives the user a dropdown to select one from.



The screenshot shows the 'Field Management' interface with the 'Profile Overview' tab selected. The 'Form Name and Settings' section shows the form name as 'Adult Member Form'. The 'Fields and Sections' section shows a list of fields. A red arrow points to the 'Fields and Sections' section, and another red arrow points to the 'Dropdown' field type selected for the field.

Date

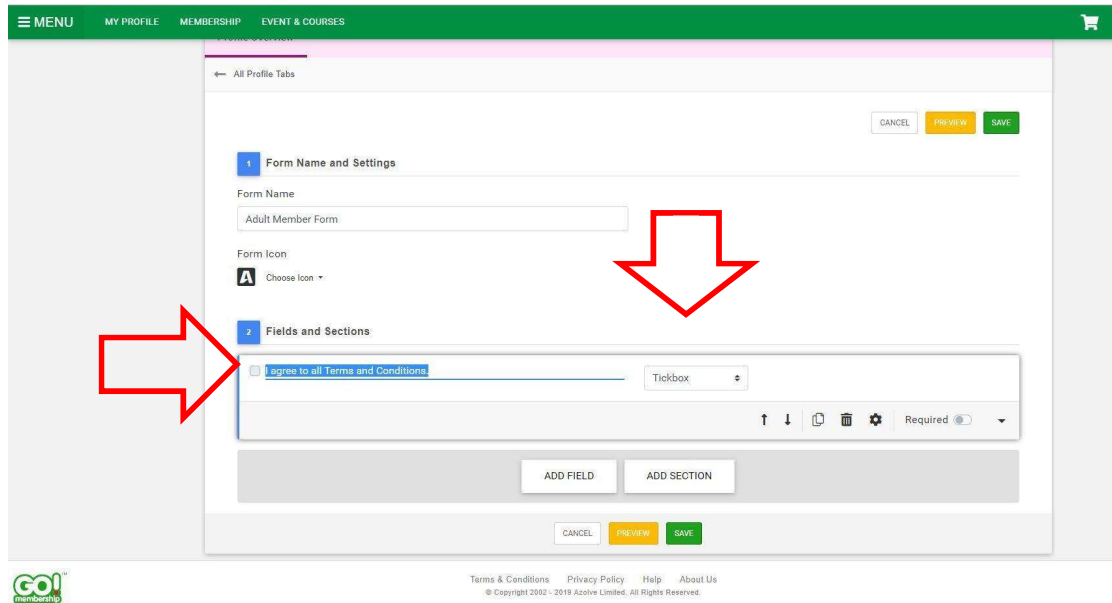
This field is used for an exact date.



The screenshot shows the 'Field Management' interface with the 'Profile Overview' tab selected. The 'Form Name and Settings' section shows the form name as 'Adult Member Form'. The 'Fields and Sections' section shows a list of fields. A red arrow points to the 'Fields and Sections' section, and another red arrow points to the 'Date' field type selected for the field.

Tickbox

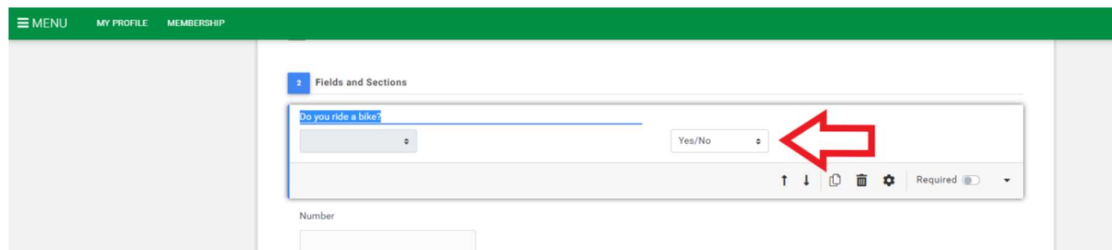
This field is a single predetermined sentence which can be ticked. For example, it could be used for agreeing to the terms and conditions.



The screenshot shows the 'GO! membership' form editor interface. The top navigation bar includes 'MENU', 'MY PROFILE', 'MEMBERSHIP', and 'EVENT & COURSES'. The main content area is titled 'All Profile Tabs'. The 'Form Name and Settings' section shows the 'Form Name' as 'Adult Member Form'. The 'Form Icon' is set to 'A'. The 'Fields and Sections' section shows a list of fields, including 'I agree to all Terms and Conditions' with a 'Tickbox' type. A red arrow points to the 'Form Name' field, and another red arrow points to the 'Fields and Sections' tab. The bottom of the page includes the 'GO! membership' logo and a footer with 'Terms & Conditions', 'Privacy Policy', 'Help', and 'About Us'.

Yes/No

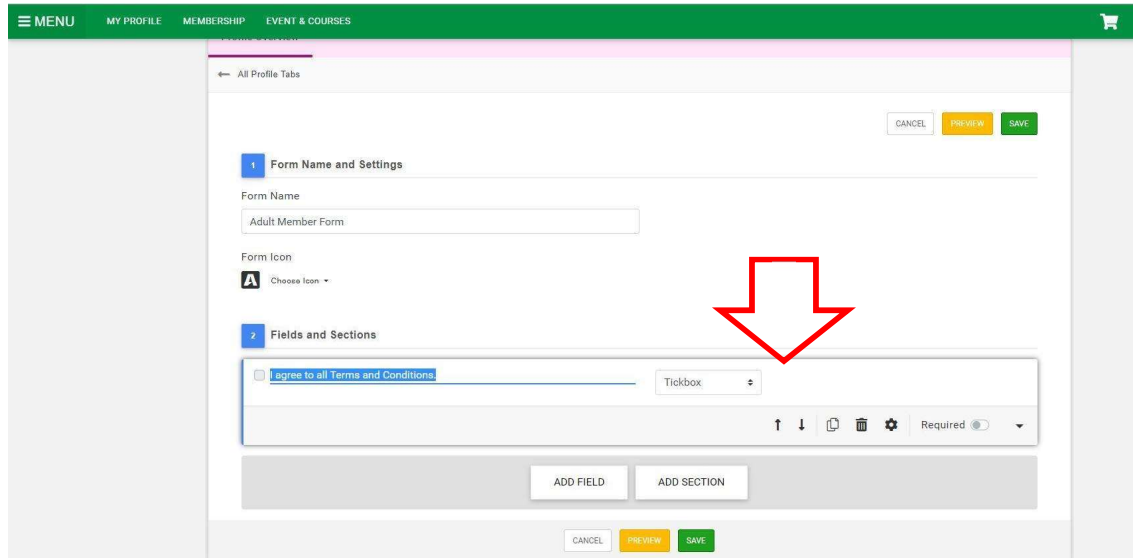
This field is used for either a Yes or No answer to a specific question.



The screenshot shows the 'GO! membership' form editor interface. The top navigation bar includes 'MENU', 'MY PROFILE', and 'MEMBERSHIP'. The main content area is titled 'Fields and Sections'. The 'Fields and Sections' section shows a list of fields, including 'Do you ride a bike?' with a 'Yes/No' type. A red arrow points to the 'Fields and Sections' tab. The bottom of the page includes the 'GO! membership' logo and a footer with '© Copyright 2002-2020 Azolve. All Rights Reserved'.

Can I change the sequence of Fields?

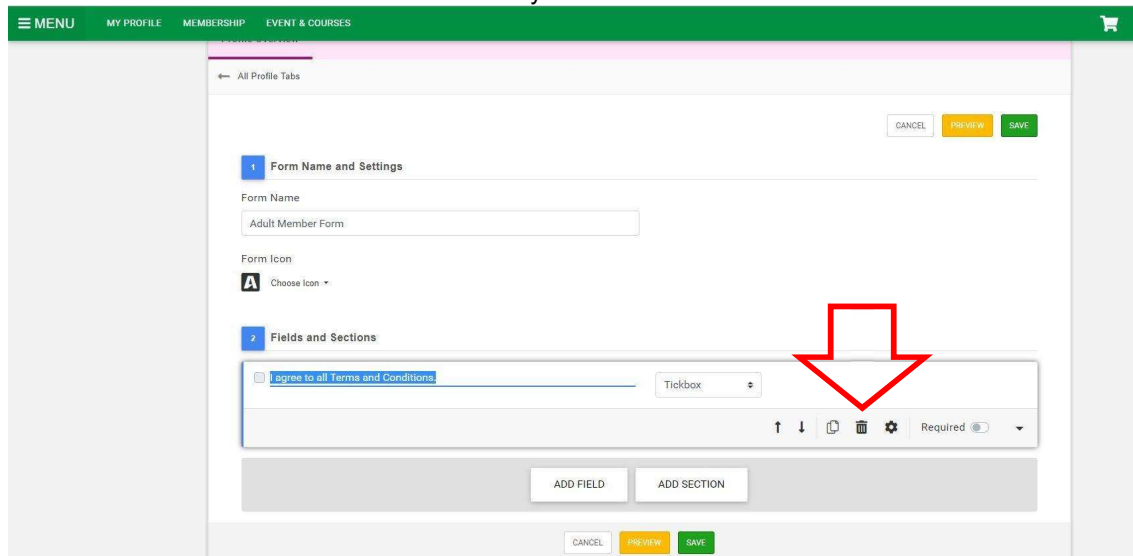
Yes, you can. There are sequence icons (up and down) that you can use to change the position of the Fields (questions) on the form.



The screenshot shows the 'Form Name and Settings' section with 'Form Name' set to 'Adult Member Form' and 'Form Icon' set to 'Choose Icon'. Below this is the 'Fields and Sections' section, which contains a list of fields. The first field is 'I agree to all Terms and Conditions' with a 'Tickbox' type. At the bottom of the field list, there are icons for moving fields up and down, a duplicate icon, a delete icon, and a settings icon. A red arrow points to the up and down sequence icons.

Can I delete a Field?

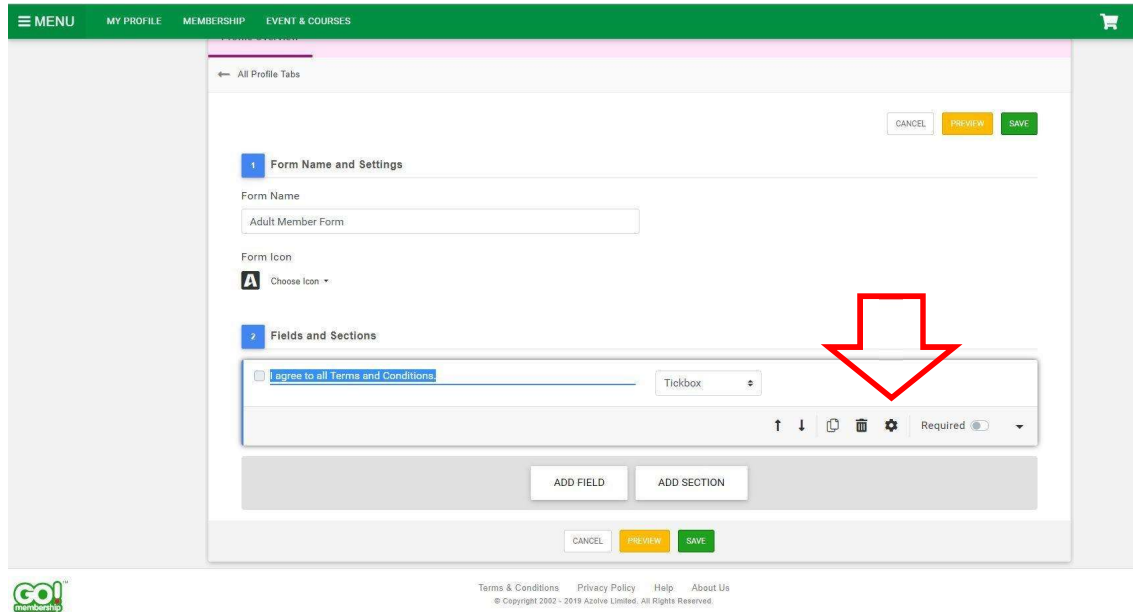
You can delete a Field if it is not required. Note however, that if the Field has already been filled by any user and there is data linked to it, you will need to re-link those to an appropriate Field to see it under member records. The delete icon is indicated by the red arrow.



This screenshot is identical to the one above, showing the 'Form Name and Settings' and 'Fields and Sections' interface. In this view, a red arrow points to the delete icon (a trash can) in the field management bar at the bottom of the field list.

What other options are available?

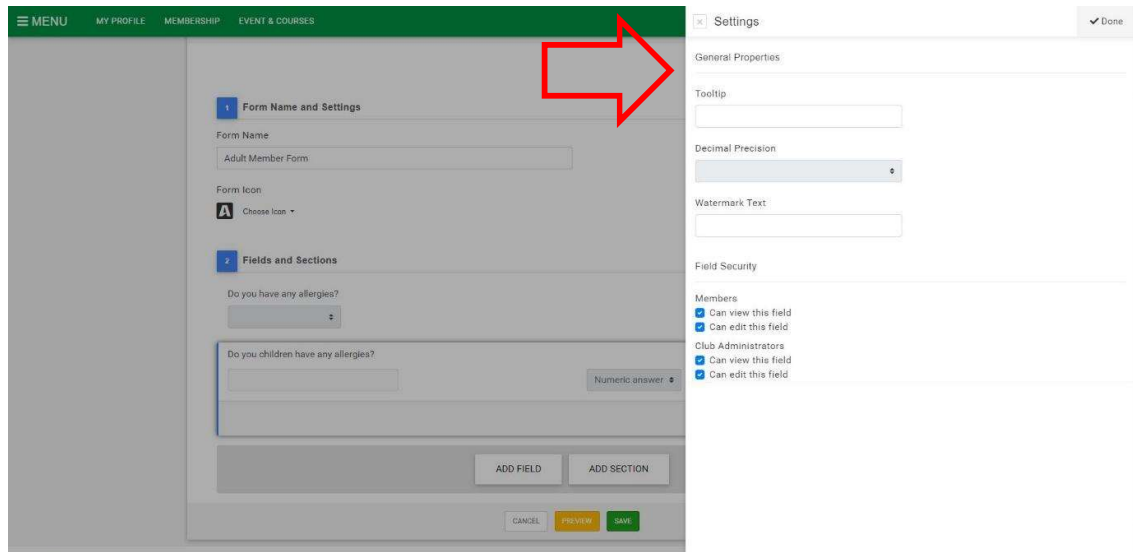
There are a few more options available. To access them click on the Settings icon indicated below.



The screenshot shows the 'Form Name and Settings' interface. It includes a 'Form Name' field with the value 'Adult Member Form' and a 'Form Icon' dropdown menu. Below these is the 'Fields and Sections' section, which contains a list of fields. The first field is 'I agree to all Terms and Conditions' with a 'Tickbox' type. At the bottom right of this list is a 'Settings' icon (a gear) which is highlighted by a red arrow. Below the list are 'ADD FIELD' and 'ADD SECTION' buttons. At the very bottom are 'CANCEL', 'PREVIEW', and 'SAVE' buttons.

Tooltip

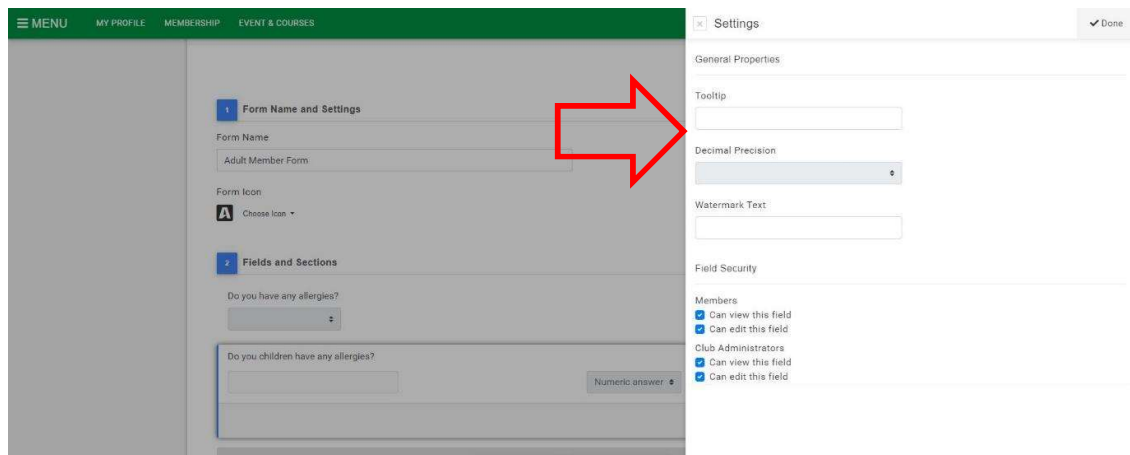
Tooltips will be visible under the field (question). This can be used as an instruction on the type of data required, or why you require this data.



The screenshot shows the 'Settings' panel on the right side of the interface. It includes a 'General Properties' section with fields for 'Tooltip', 'Decimal Precision', and 'Watermark Text'. Below this is the 'Field Security' section, which has checkboxes for 'Members' and 'Club Administrators' to 'Can view this field' and 'Can edit this field'. A red arrow points from the 'Settings' icon in the main form interface to this panel.

Decimal Precision

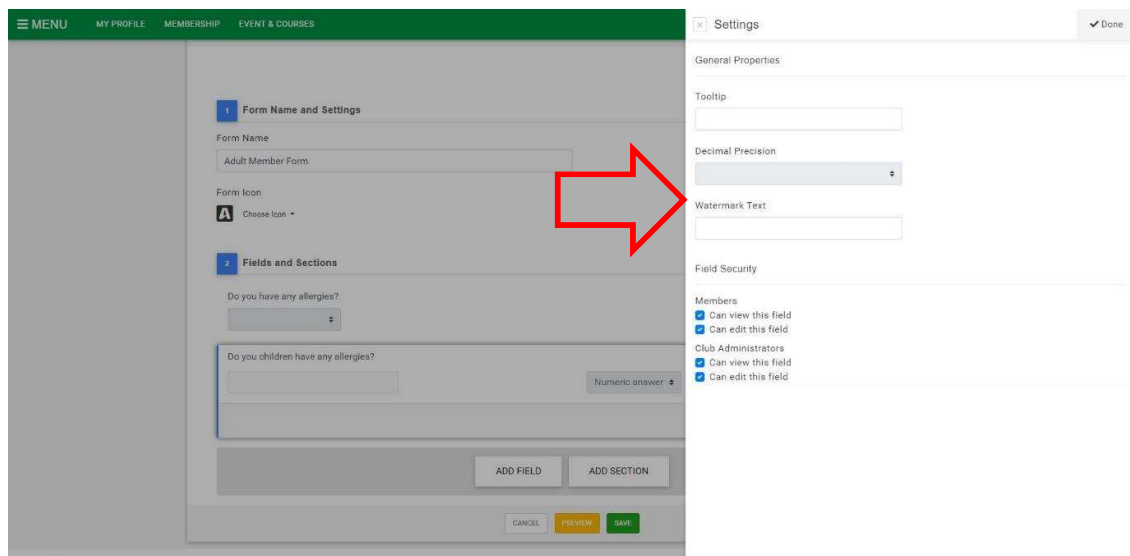
This is only available for Numeric answer type Fields. This allows you to set the number of decimal places required in the answer.



The screenshot shows the 'Settings' panel for a 'Numeric answer' field. The 'Form Name and Settings' section on the left includes 'Form Name' (Adult Member Form) and 'Form Icon' (Choose icon). The 'Fields and Sections' section includes two questions: 'Do you have any allergies?' and 'Do you children have any allergies?'. The 'Settings' panel on the right includes 'General Properties' (Tooltip, Decimal Precision, Watermark Text), 'Field Security' (Members, Club Administrators), and 'Members' (Can view this field, Can edit this field). A red arrow points from the 'Form Name and Settings' section to the 'Settings' panel.

Watermark Text

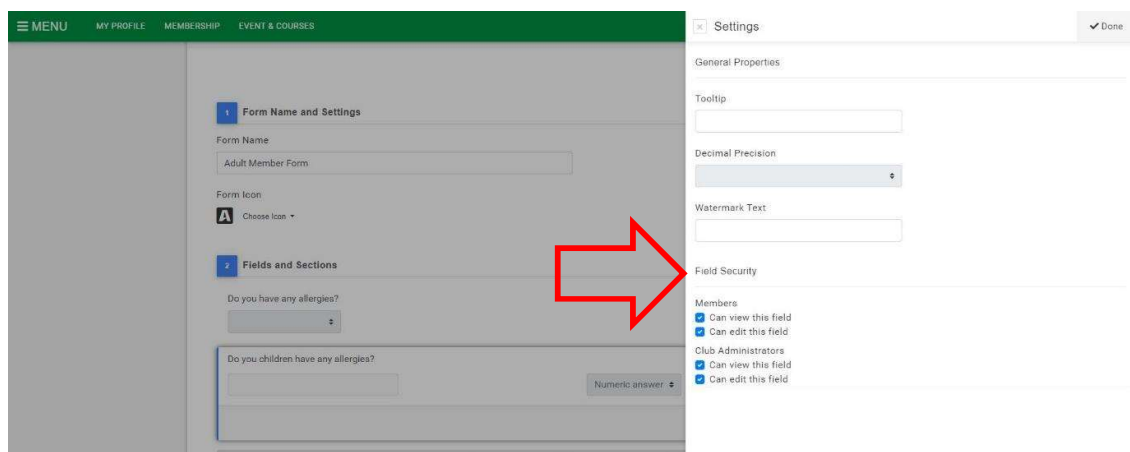
Watermark Text will be visible inside the field and disappears when the user clicks to enter data. This can be useful as an instruction on the type of data required and the reason why it is needed. The Watermark Text option can be used with Short Answer / Paragraph / Numeric / Date field types.



The screenshot shows the 'Settings' panel for a 'Numeric answer' field. The 'Form Name and Settings' section on the left includes 'Form Name' (Adult Member Form) and 'Form Icon' (Choose icon). The 'Fields and Sections' section includes two questions: 'Do you have any allergies?' and 'Do you children have any allergies?'. The 'Settings' panel on the right includes 'General Properties' (Tooltip, Decimal Precision, Watermark Text), 'Field Security' (Members, Club Administrators), and 'Members' (Can view this field, Can edit this field). A red arrow points from the 'Form Name and Settings' section to the 'Settings' panel.

Field Security

This is used to control View and Edit permissions of the field.

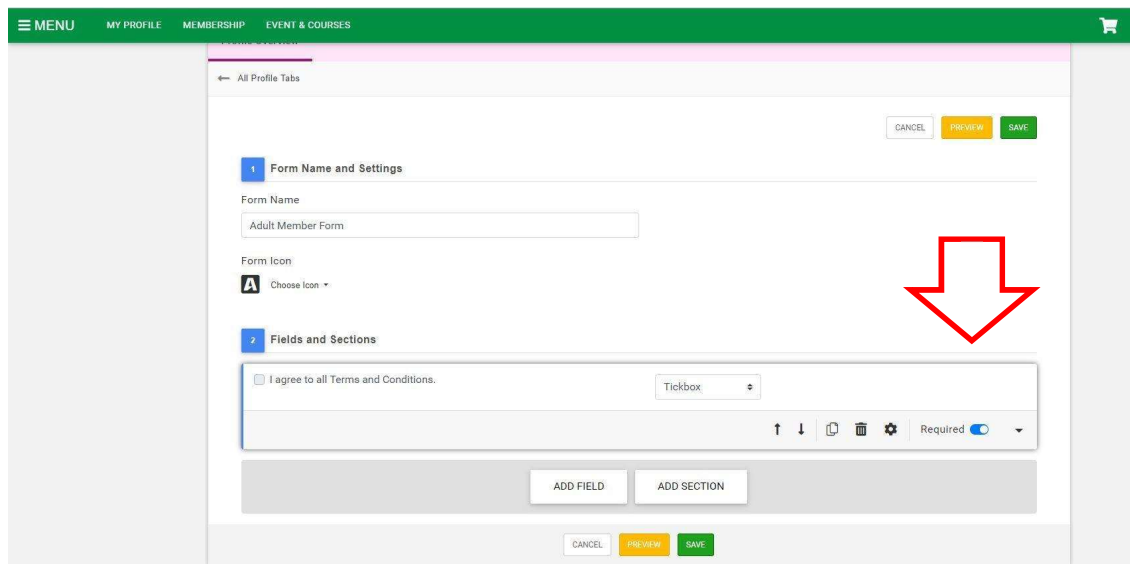


The screenshot shows the 'Settings' modal for a form. The left pane contains 'Form Name and Settings' (Form Name: Adult Member Form, Form Icon: Choose icon) and 'Fields and Sections' (Do you have any allergies?, Do you children have any allergies?). The right pane contains 'General Properties' (Tooltip, Decimal Precision, Watermark Text) and 'Field Security'. Under 'Field Security', there are checkboxes for 'Members' (Can view this field, Can edit this field) and 'Club Administrators' (Can view this field, Can edit this field). A red arrow points from the 'Fields and Sections' section in the left pane to the 'Field Security' section in the right pane.

NOTE: Please click on Done at the top right corner to save the changes you made.

Can I make a Field mandatory for members?

Yes, you can do this by using the Required toggle indicated below. Once activated it turns blue and completion of that field / question will be mandatory.

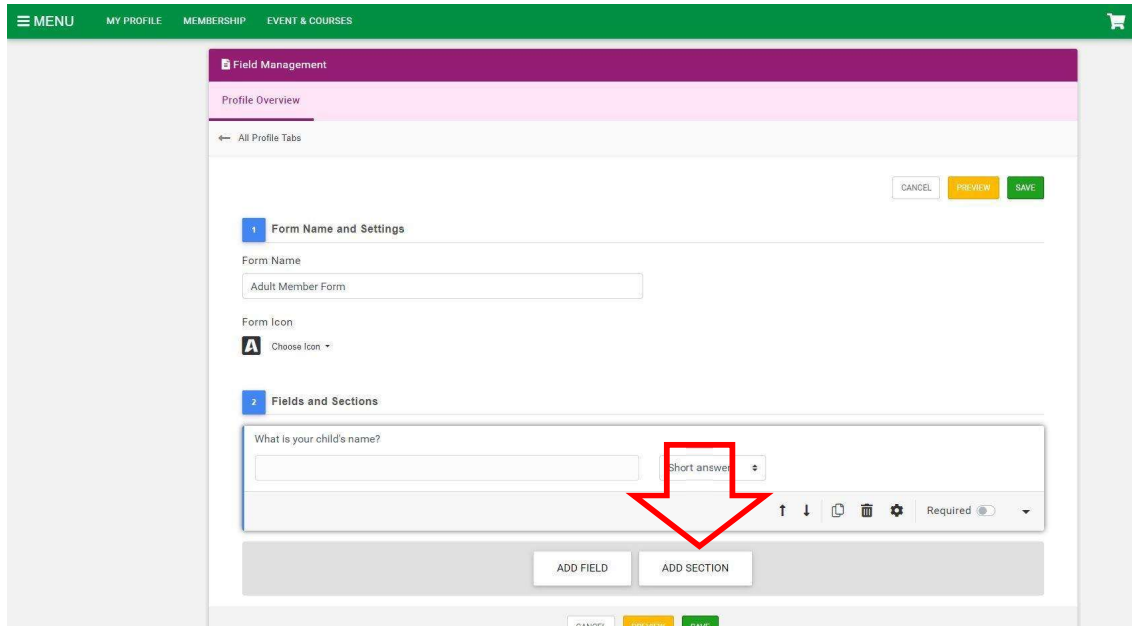


The screenshot shows the 'Form Name and Settings' modal. The 'Form Name' is 'Adult Member Form' and the 'Form Icon' is 'Choose icon'. Below these is the 'Fields and Sections' section. It contains a field 'I agree to all Terms and Conditions.' with a 'Tickbox' type. At the bottom of the field, there is a 'Required' toggle switch, which is currently turned on (blue). A red arrow points to this toggle switch.

NOTE: If a Field has the required toggled on, it will be mandatory for all members. If you want to make it membership specific then please see page 17.

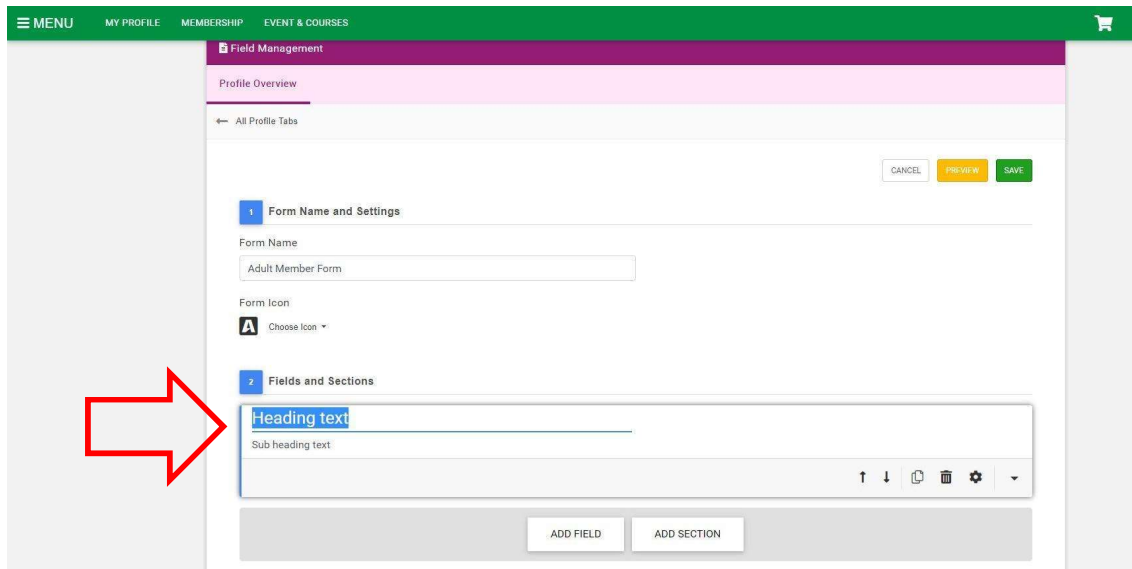
What are Sections?

Sections are used primarily to separate fields / questions into different categories within the Form. They can be added using the button indicated by the red arrow.



The screenshot shows the 'Field Management' interface with the 'Fields and Sections' section selected. A red arrow points to the 'ADD SECTION' button at the bottom of the section list.

Sections consists of two parts, the heading and the sub-heading as indicated by the red arrow.

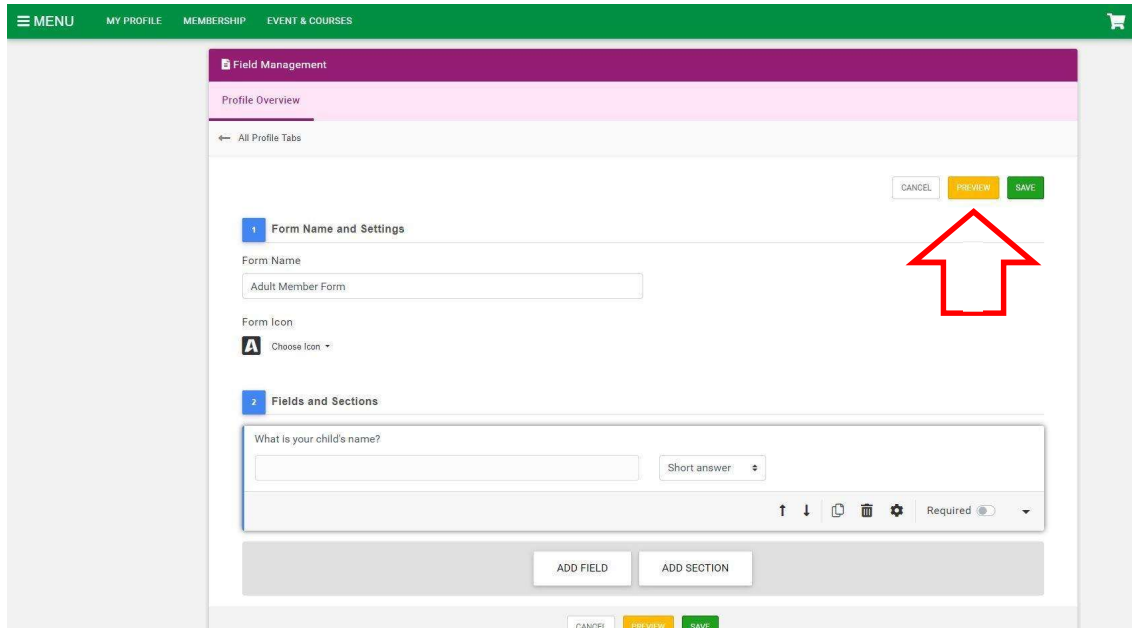


The screenshot shows the 'Field Management' interface with the 'Fields and Sections' section selected. A red arrow points to the 'Heading text' field in the section editor.

NOTE: You can use a Sub-heading as a way to highlight a point in the form.

Can I see how the Form looks before I save it?

Yes, use the Preview button as indicated by the red arrow.

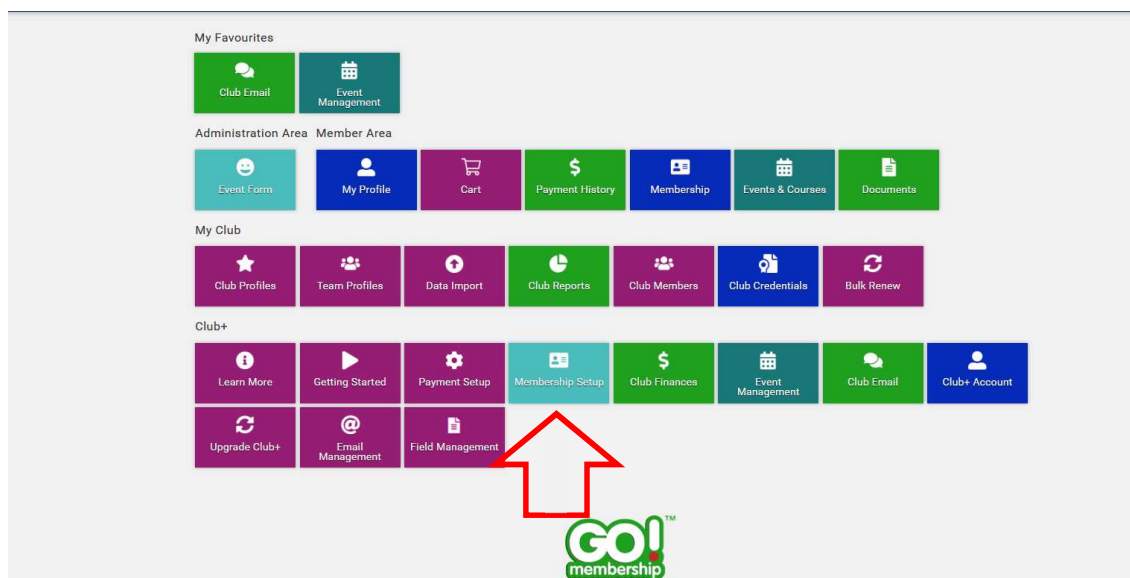


The screenshot shows the 'Field Management' interface with a green header bar containing 'MENU', 'MY PROFILE', 'MEMBERSHIP', and 'EVENT & COURSES'. Below the header, there's a 'Profile Overview' tab. The main content area is divided into two sections: '1 Form Name and Settings' and '2 Fields and Sections'. In the 'Form Name and Settings' section, there's a 'Form Name' field with the text 'Adult Member Form' and a 'Form Icon' dropdown menu. In the 'Fields and Sections' section, there's a form field with the label 'What is your child's name?' and a 'Short answer' dropdown. At the bottom of the form, there are 'ADD FIELD' and 'ADD SECTION' buttons. A red arrow points to the 'PREVIEW' button in the top right corner of the form area.

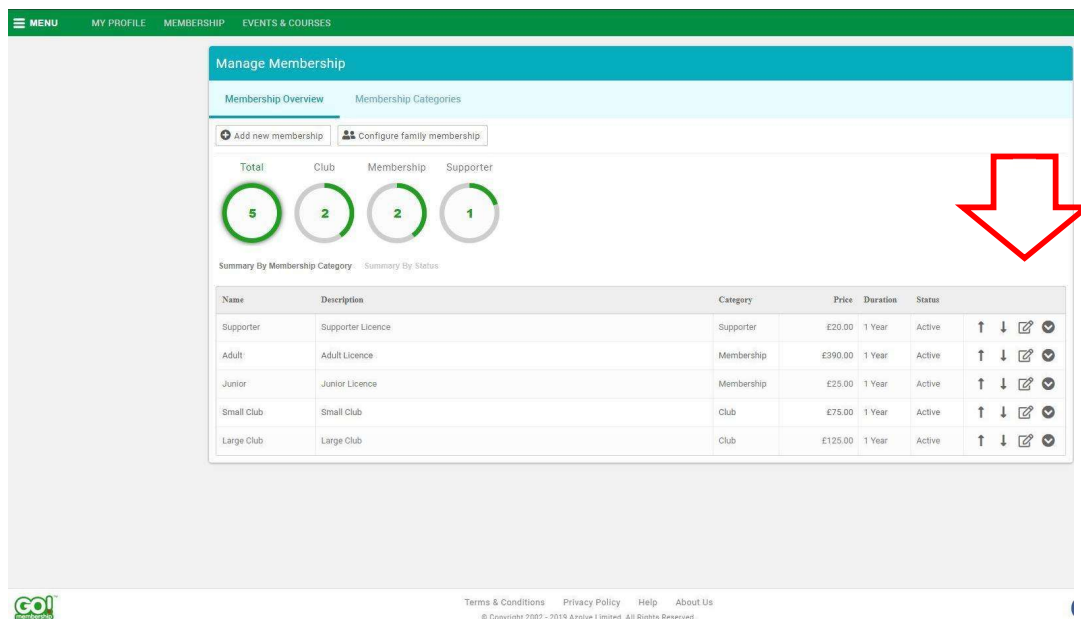
NOTE: It is always good practice to preview the form as once saved, it will immediately be available for members to view and fill in. Press Save to save changes or Cancel to discard changes.

Can I create a Form for a specific membership only?

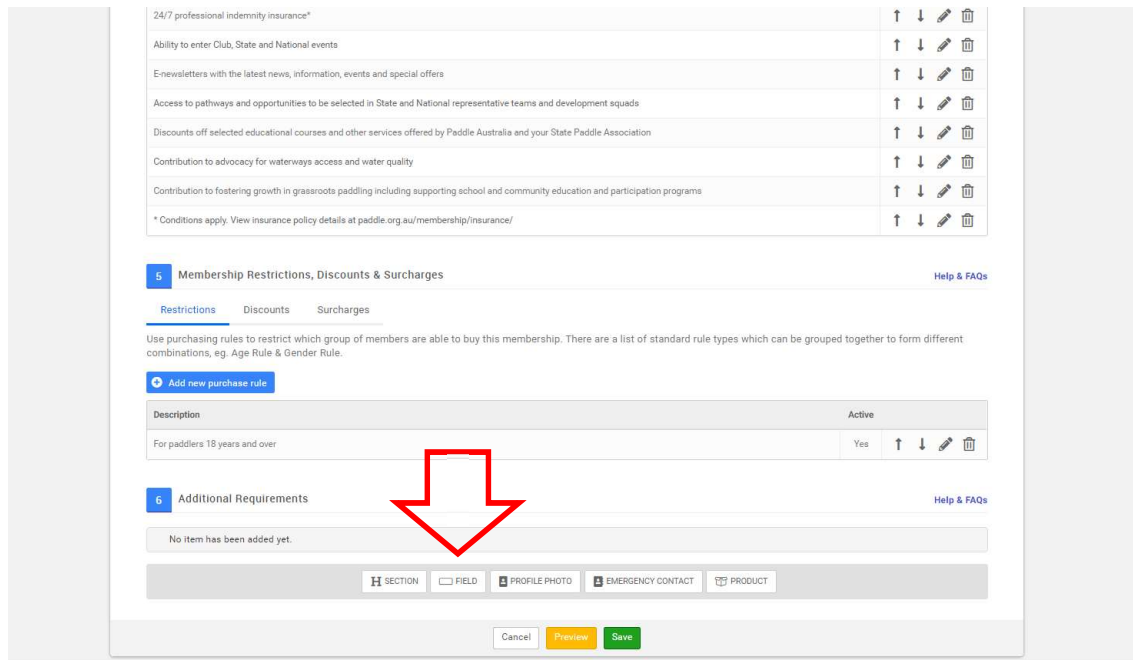
No, any Forms you create will be available to all members through the Member Details tab under My Profile. However you can make a Field (question) mandatory to members with a specific Membership type. To do so, go to the Membership Management tile via the homepage or menu.



Click on the edit button next to the membership you created the field for.



You can link the fields that you created in the Field Management section by clicking on the Field button indicated below.



24/7 professional indemnity insurance*

Ability to enter Club, State and National events

E-newsletters with the latest news, information, events and special offers

Access to pathways and opportunities to be selected in State and National representative teams and development squads

Discounts off selected educational courses and other services offered by Paddle Australia and your State Paddle Association

Contribution to advocacy for waterways access and water quality

Contribution to fostering growth in grassroots paddling including supporting school and community education and participation programs

* Conditions apply. View insurance policy details at paddle.org.au/membership/insurance/

6 Membership Restrictions, Discounts & Surcharges [Help & FAQs](#)

[Restrictions](#) [Discounts](#) [Surcharges](#)

Use purchasing rules to restrict which group of members are able to buy this membership. There are a list of standard rule types which can be grouped together to form different combinations, eg. Age Rule & Gender Rule.

[Add new purchase rule](#)

Description	Active
For paddlers 18 years and over	Yes ↑ ↓ ✎ ✕

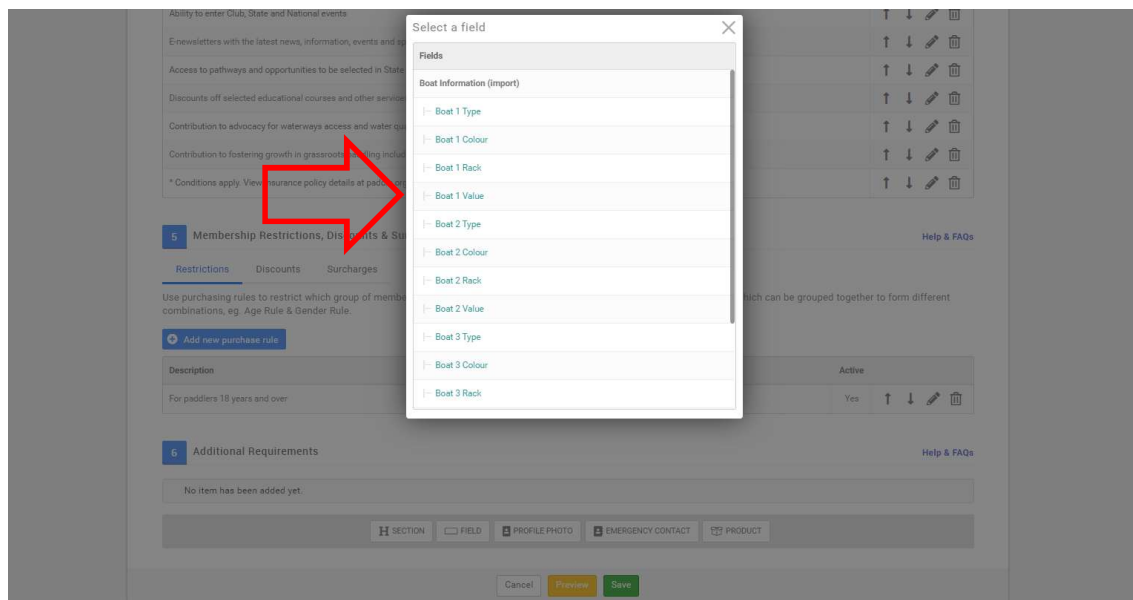
6 Additional Requirements [Help & FAQs](#)

No item has been added yet.

[SECTION](#) [FIELD](#) [PROFILE PHOTO](#) [EMERGENCY CONTACT](#) [PRODUCT](#)

[Cancel](#) [Preview](#) [Save](#)

Select the Field you want to import.



Ability to enter Club, State and National events

E-newsletters with the latest news, information, events and special offers

Access to pathways and opportunities to be selected in State and National representative teams and development squads

Discounts off selected educational courses and other services offered by Paddle Australia and your State Paddle Association

Contribution to advocacy for waterways access and water quality

Contribution to fostering growth in grassroots paddling including supporting school and community education and participation programs

* Conditions apply. View insurance policy details at paddle.org.au/membership/insurance/

5 Membership Restrictions, Discounts & Surcharges [Help & FAQs](#)

[Restrictions](#) [Discounts](#) [Surcharges](#)

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[Add new purchase rule](#)

Description	Active
For paddlers 18 years and over	Yes ↑ ↓ ✎ ✕

6 Additional Requirements [Help & FAQs](#)

No item has been added yet.

[SECTION](#) [FIELD](#) [PROFILE PHOTO](#) [EMERGENCY CONTACT](#) [PRODUCT](#)

[Cancel](#) [Preview](#) [Save](#)

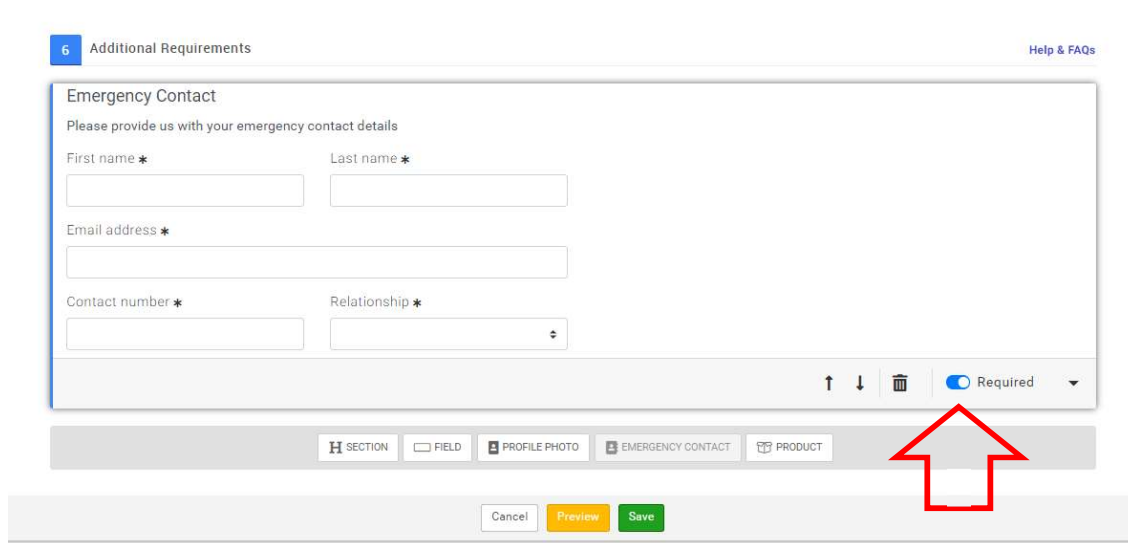
Select a field

Fields

Boat Information (import)

- Boat 1 Type
- Boat 1 Colour
- Boat 1 Rack
- Boat 1 Value
- Boat 2 Type
- Boat 2 Colour
- Boat 2 Rack
- Boat 2 Value
- Boat 3 Type
- Boat 3 Colour
- Boat 3 Rack

Once a Field has been linked, toggle the Required button to make it mandatory.



6 Additional Requirements [Help & FAQs](#)

Emergency Contact
Please provide us with your emergency contact details

First name * Last name *

Email address *

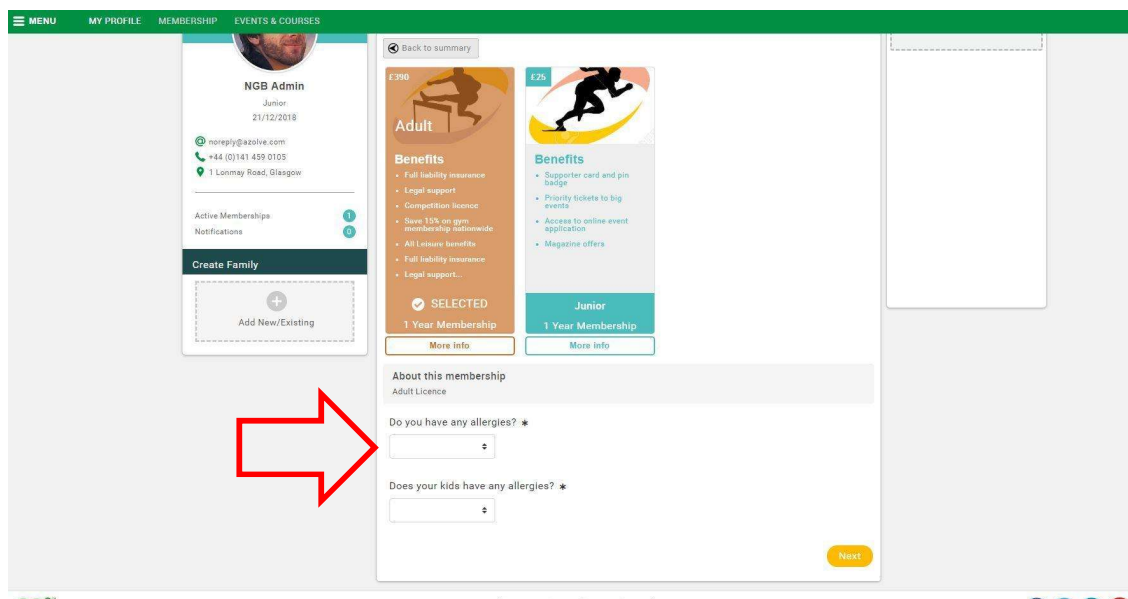
Contact number * Relationship *

↑ ↓ ☐ Required

SECTION FIELD PROFILE PHOTO EMERGENCY CONTACT PRODUCT

Cancel Preview Save

Fields linked here will show up on the membership journey i.e. when a user is trying to buy the membership, as indicated by the red arrow below.



Back to summary

Adult £390

Benefits

- Full facility insurance
- Legal support
- Competition licence
- Save 10% on gym membership nationwide
- All Leisure benefits
- Full liability insurance
- Legal support...

SELECTED

1 Year Membership

More info

About this membership

Adult Licence

Do you have any allergies? *

Does your kids have any allergies? *

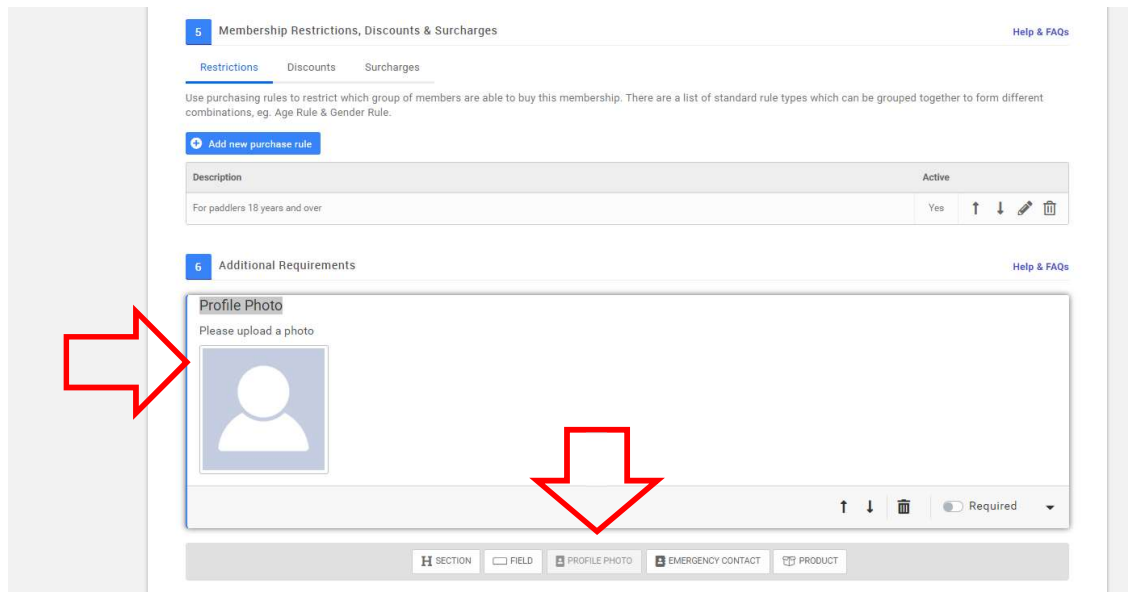
Next

What else can I add in the Membership Journey?

There are a few more features available to add in the Membership Journey.

Profile Photo

This field is used to ask for a profile photo. This can be made mandatory using the Required toggle.



5 Membership Restrictions, Discounts & Surcharges [Help & FAQs](#)

[Restrictions](#) [Discounts](#) [Surcharges](#)

Use purchasing rules to restrict which group of members are able to buy this membership. There are a list of standard rule types which can be grouped together to form different combinations, eg. Age Rule & Gender Rule.


[Add new purchase rule](#)

Description	Active
For paddlers 18 years and over	Yes ↑ ↓ ✎ ✕

6 Additional Requirements [Help & FAQs](#)

Profile Photo

Please upload a photo

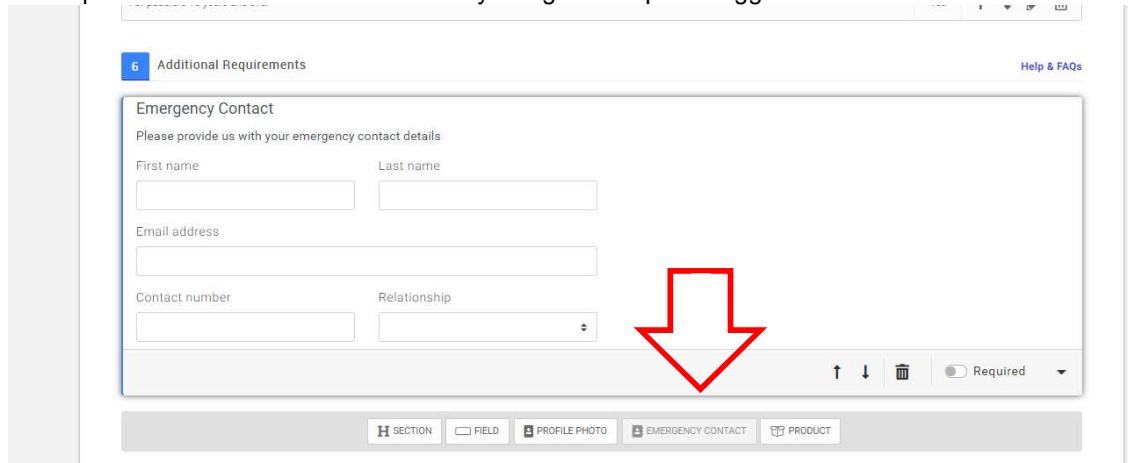


↑ ↓ ✕ ☒ Required ▼

[SECTION](#) [FIELD](#) [PROFILE PHOTO](#) [EMERGENCY CONTACT](#) [PRODUCT](#)

Emergency Contact

This field is used to ask the member for an Emergency Contact. The information will be added to the user's profile. This can be made mandatory using the Required toggle.



6 Additional Requirements [Help & FAQs](#)

Emergency Contact

Please provide us with your emergency contact details

First name Last name

Email address

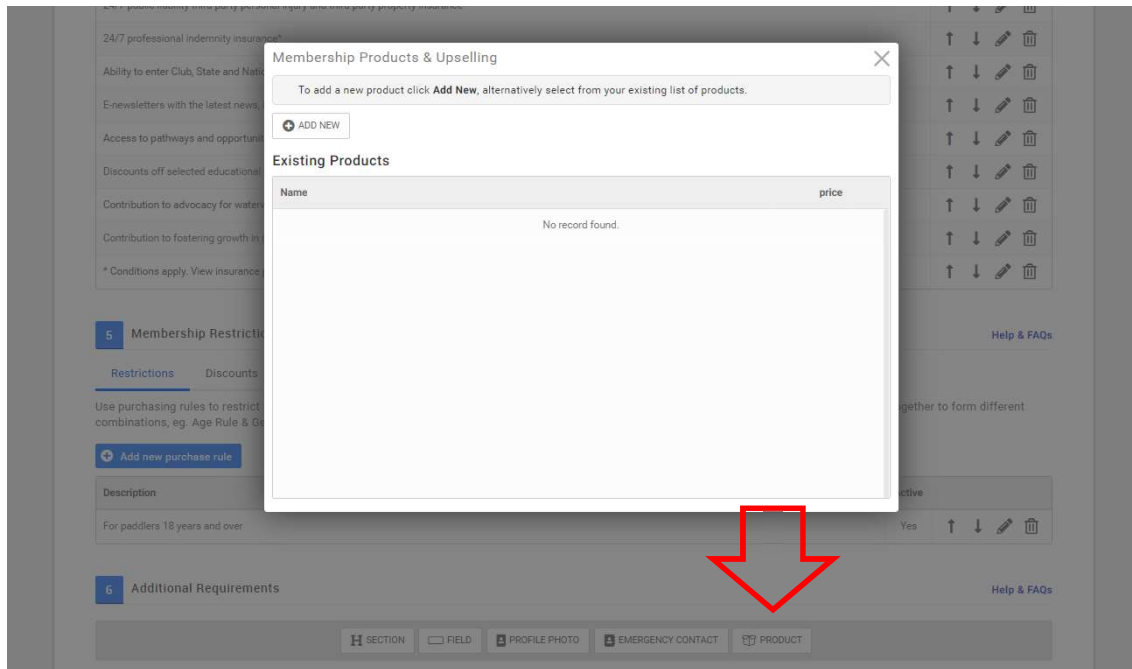
Contact number Relationship

↑ ↓ ✕ ☒ Required ▼

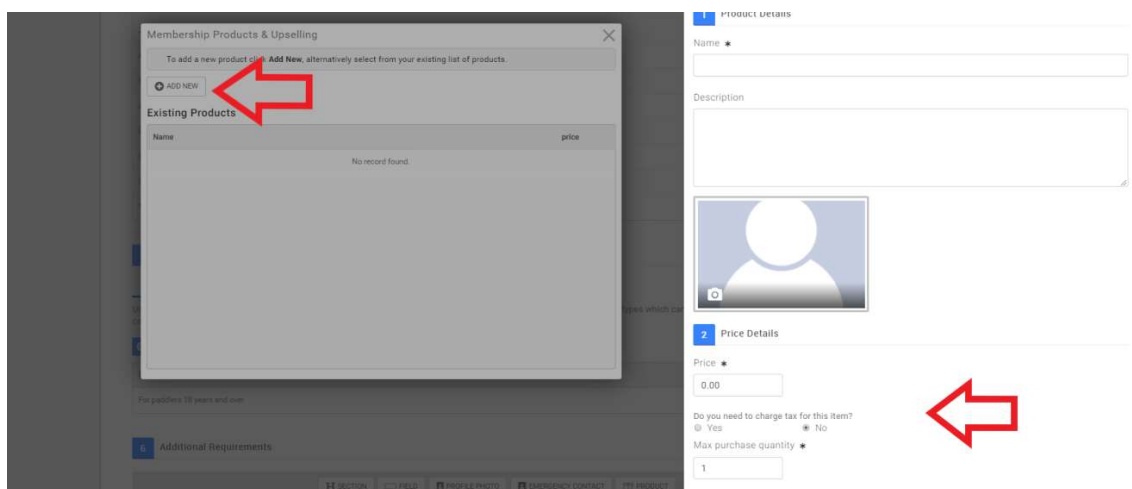
[SECTION](#) [FIELD](#) [PROFILE PHOTO](#) [EMERGENCY CONTACT](#) [PRODUCT](#)

Product

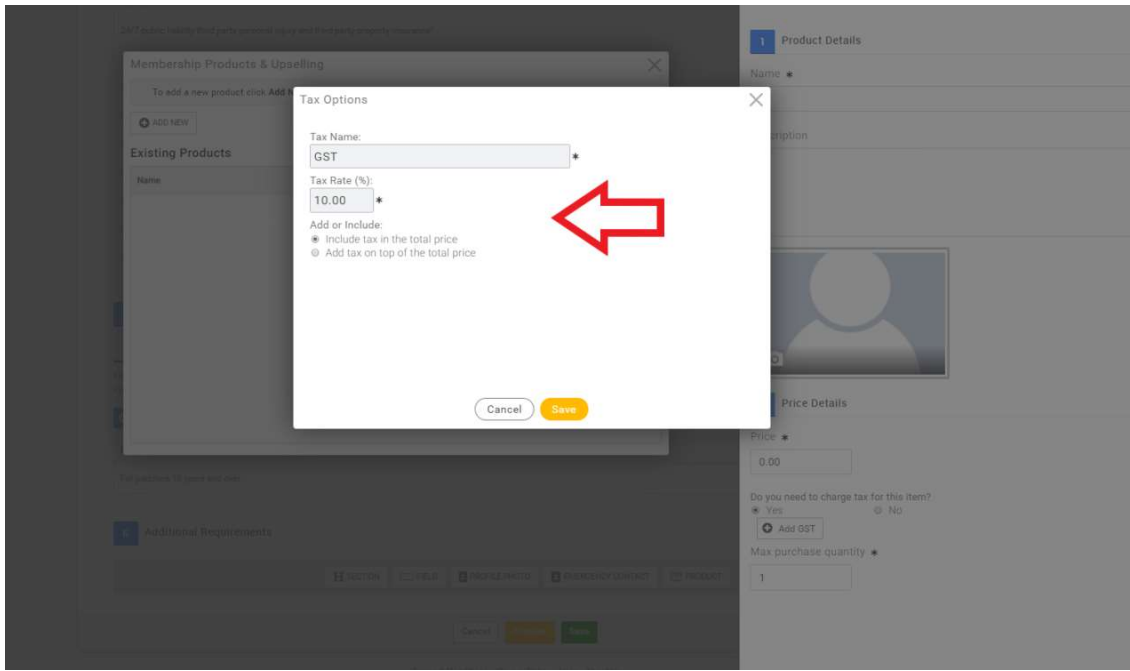
This field is used to offer other products in the membership journey as upsells, eg. merchandise, equipment, publications.



To add a product, please click on the Add New button and complete the Product Details i.e. Name, Description, Image, Price etc.



If the product is taxable, select yes and add the tax rate. Save the tax options, and then select Done to save the Product.



Where are my existing customised fields?

Your existing customised fields have also been transferred to Field Management. However, as changing the fields will have knock on effects on your environment, they have been restricted from being edited. If you need to change them, then a service request must be raised at the Service Desk.

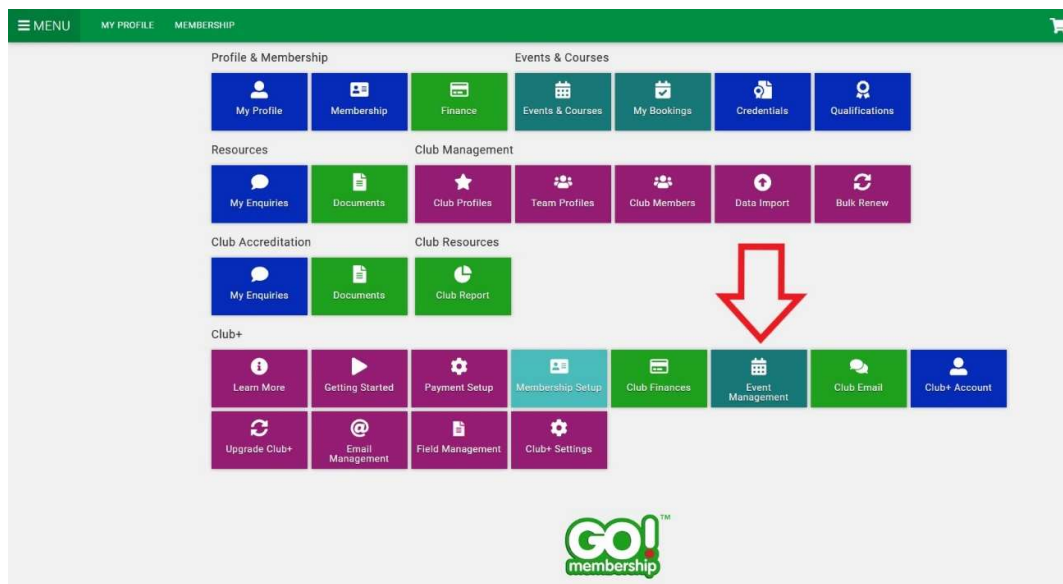
Can I create a Form for a specific event ticket?

Yes, the v2.5 release lets Club Admins create forms and fields for event tickets. These forms can be reused for other tickets. Go to the Event Overview tab in the Field Management tile and select the club from the dropdown menu. Click Add New Form.

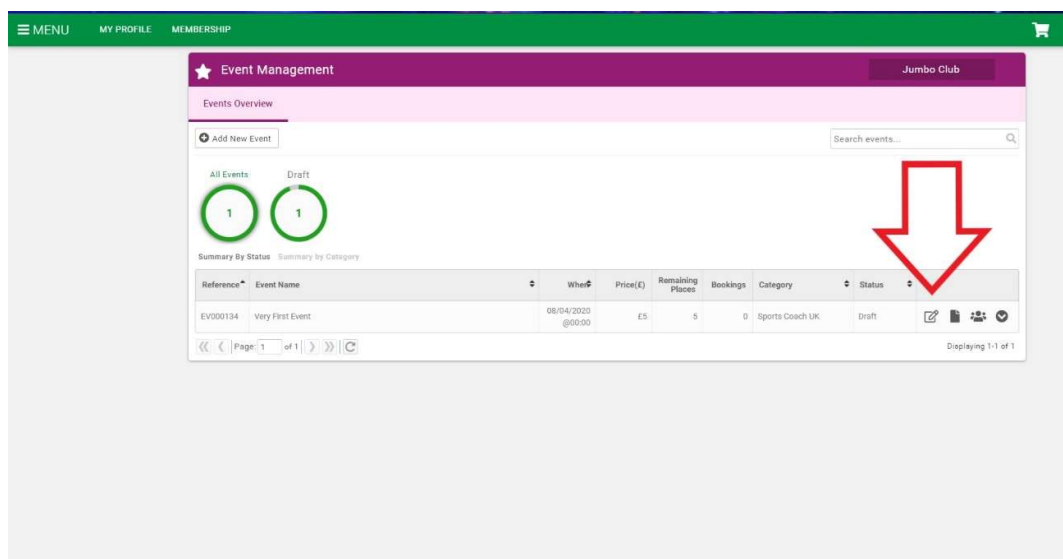


How do I add a Form to a ticket?

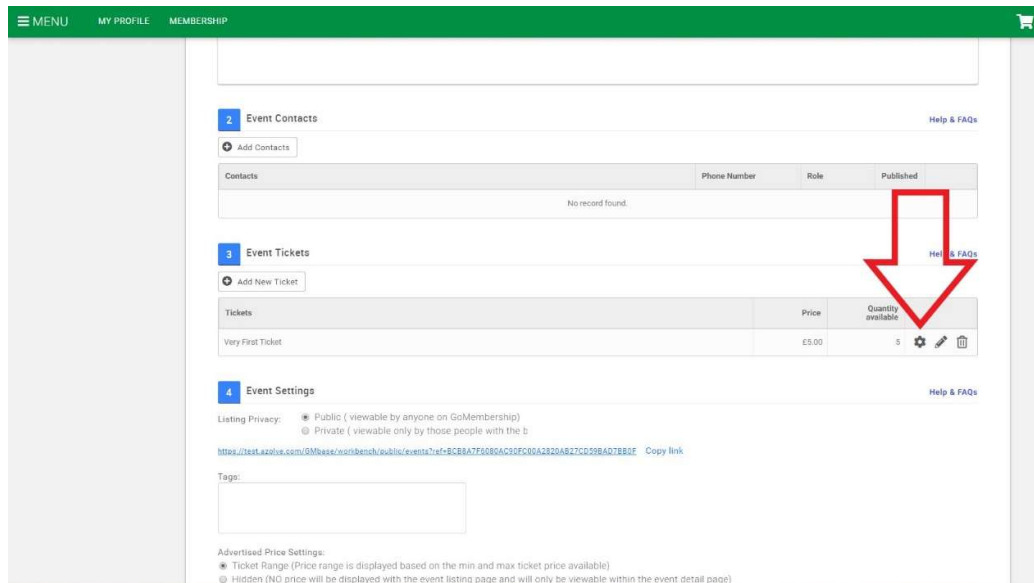
You can add a form created in Field Management to an event ticket through the Event Management tile.



Click on the edit button next to the event you created the ticket form for.

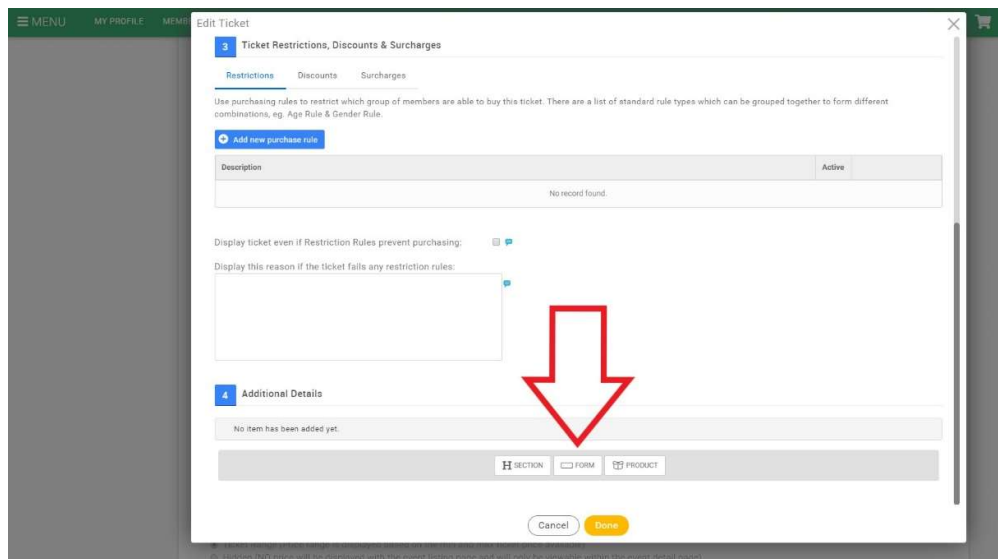


Scroll down to Section 3 and click on the Advance Setting button of the ticket.



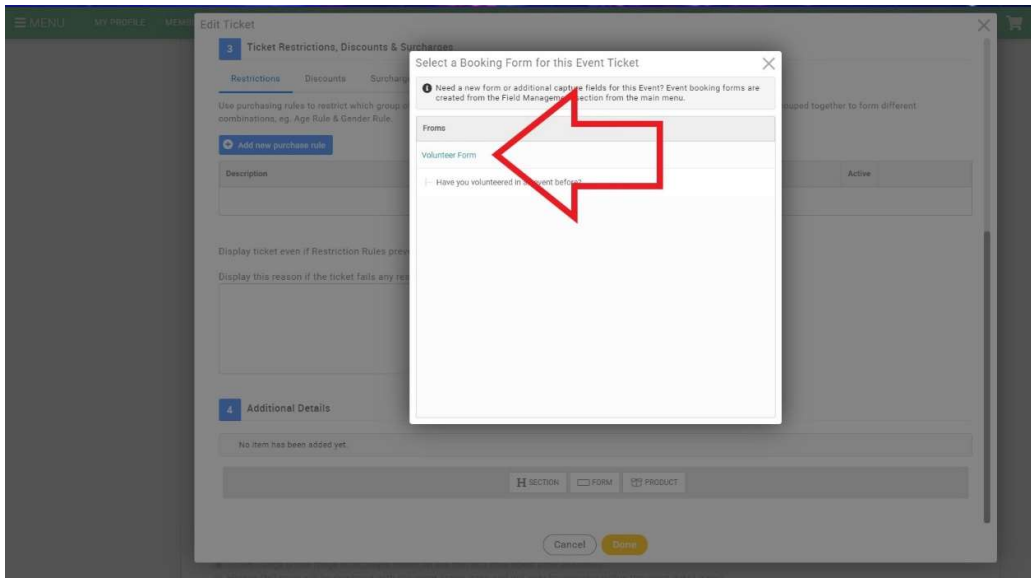
The screenshot shows the 'Event Tickets' section of the Go! membership dashboard. It includes a table with columns for 'Tickets', 'Price', and 'Quantity available'. A red arrow points to the 'Advance Settings' button next to the 'Very First Ticket'.

Scroll down to Section 4 and click on the Form button.

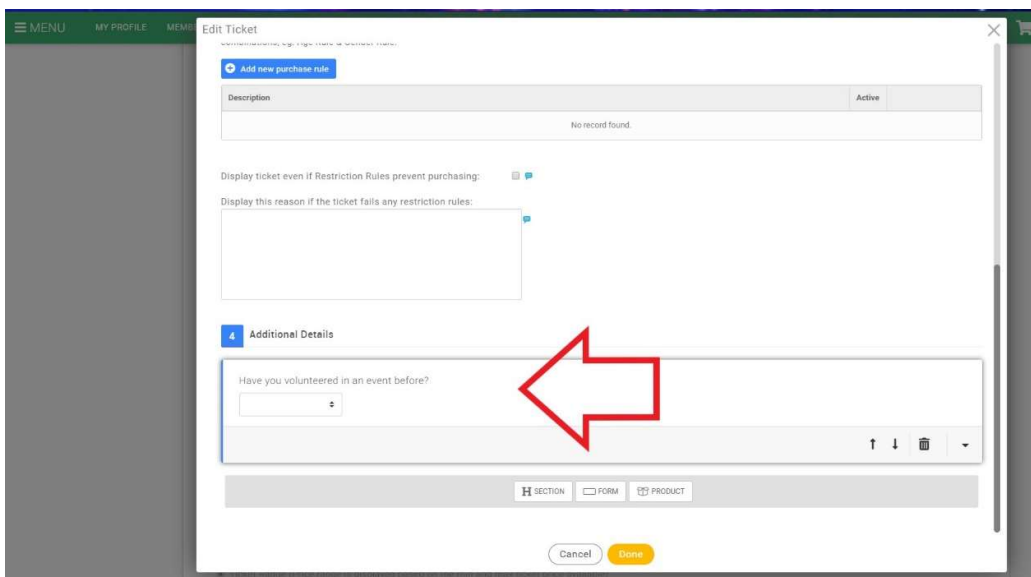


The screenshot shows the 'Edit Ticket' form with the 'Ticket Restrictions, Discounts & Surcharges' section active. It includes a table for 'Restrictions' and a section for 'Additional Details'. A red arrow points to the 'Form' button at the bottom.

A pop-up containing all the Event tickets will be displayed. Click on your desired form.



The chosen form will be imported.



Note: Click on Done to save your changes.