Club+ Field Management FAQs

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.
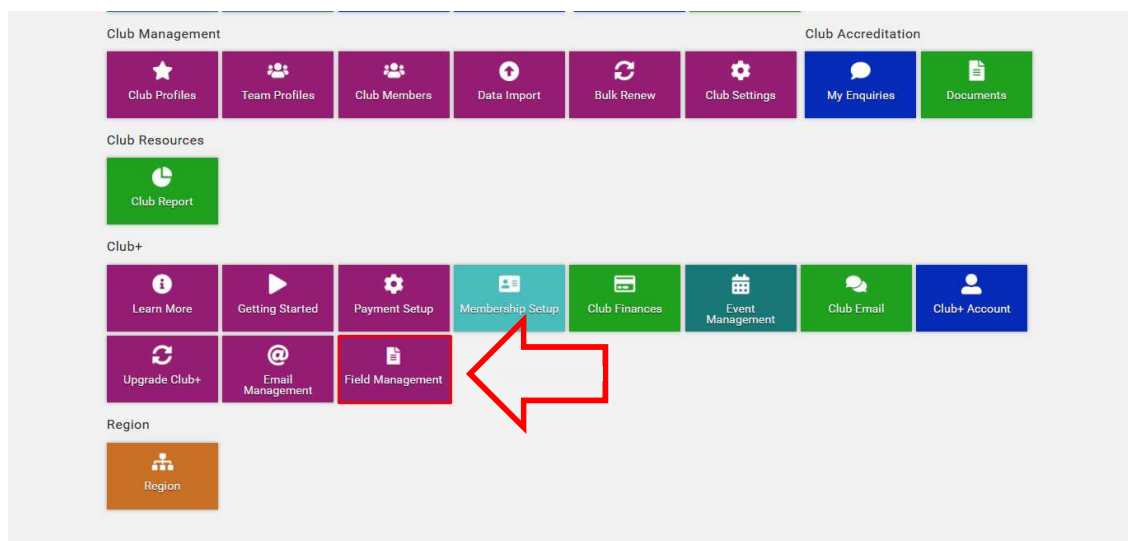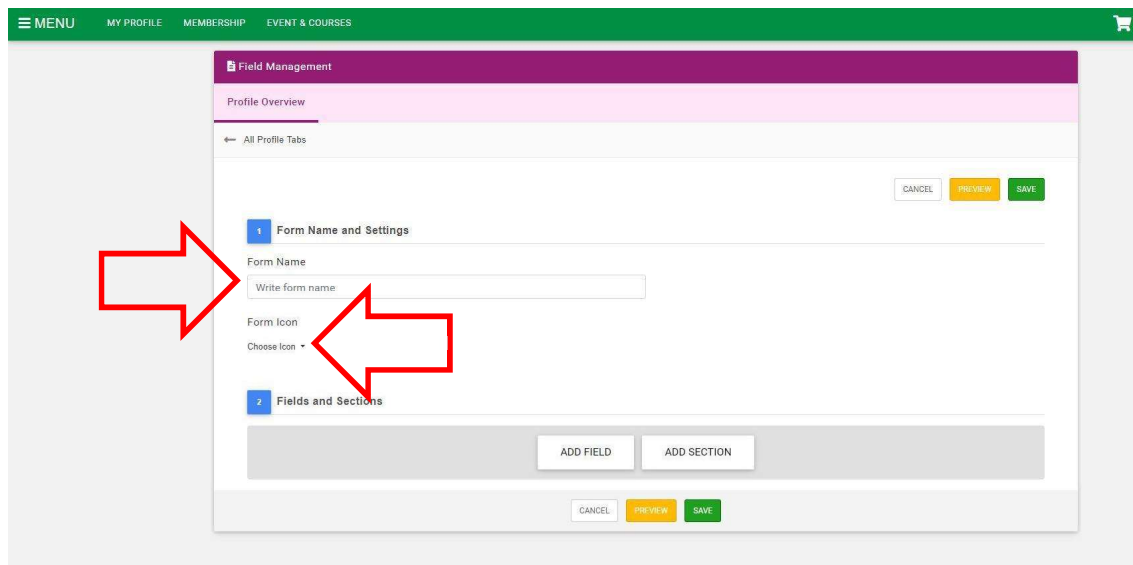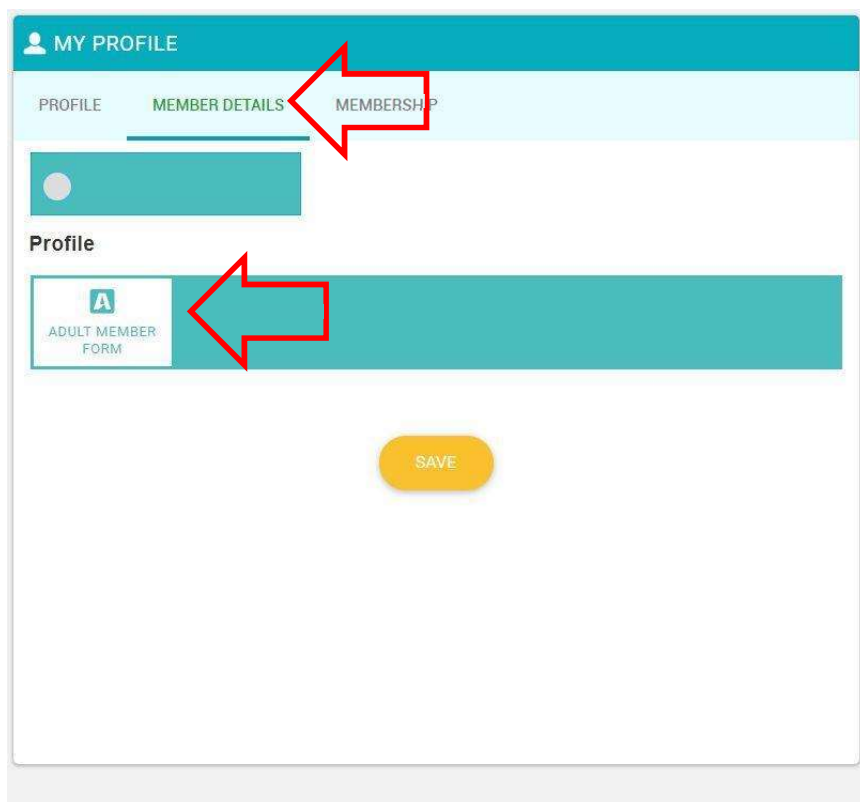
What are Forms?

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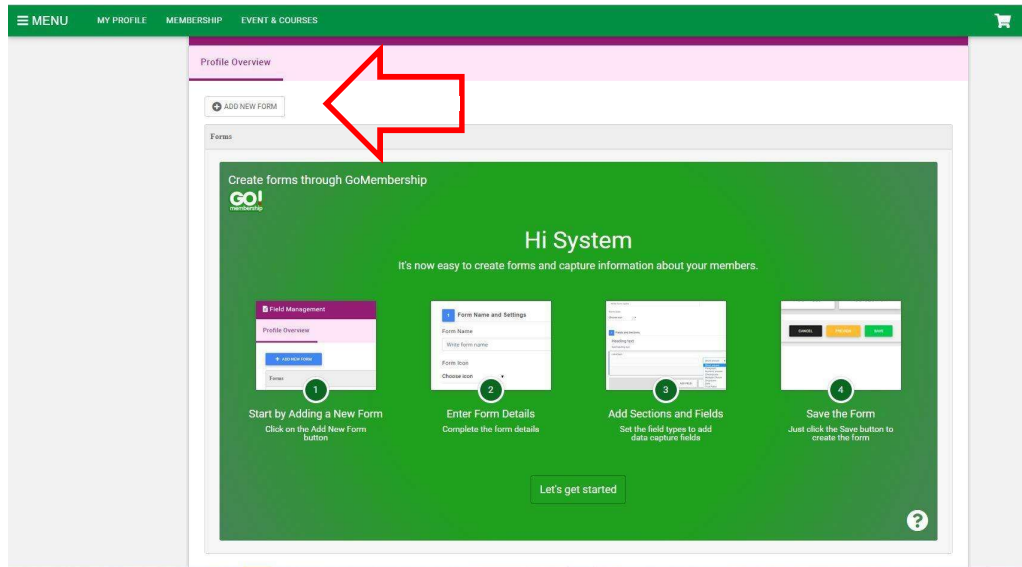
Start by giving the Form a name and select an icon to identify it.

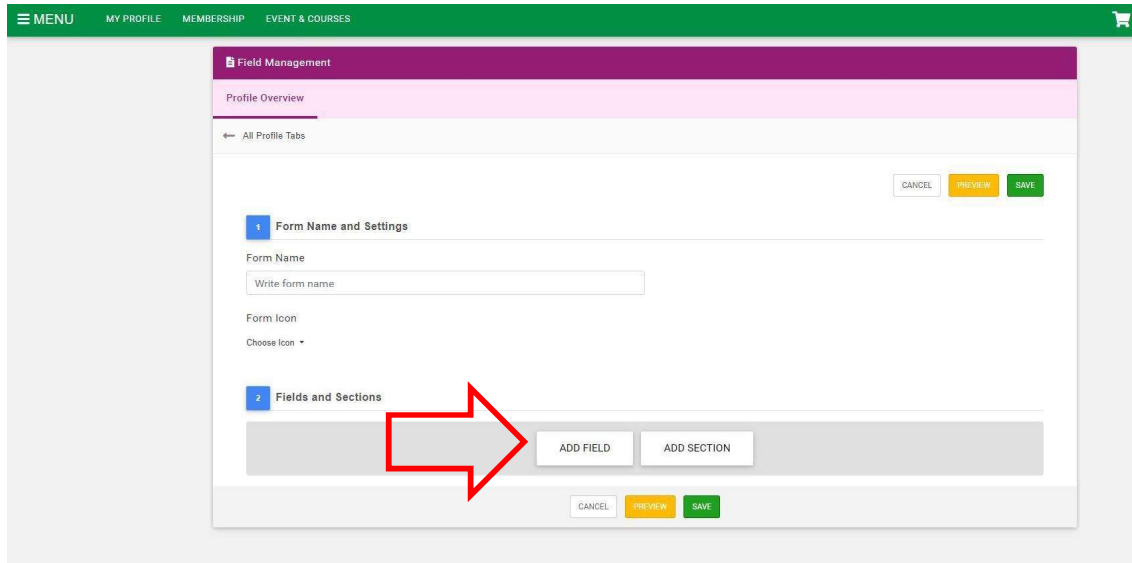The new form will show up under My Profile as Member Details – the example below shows how the Form Name and Icon are displayed.
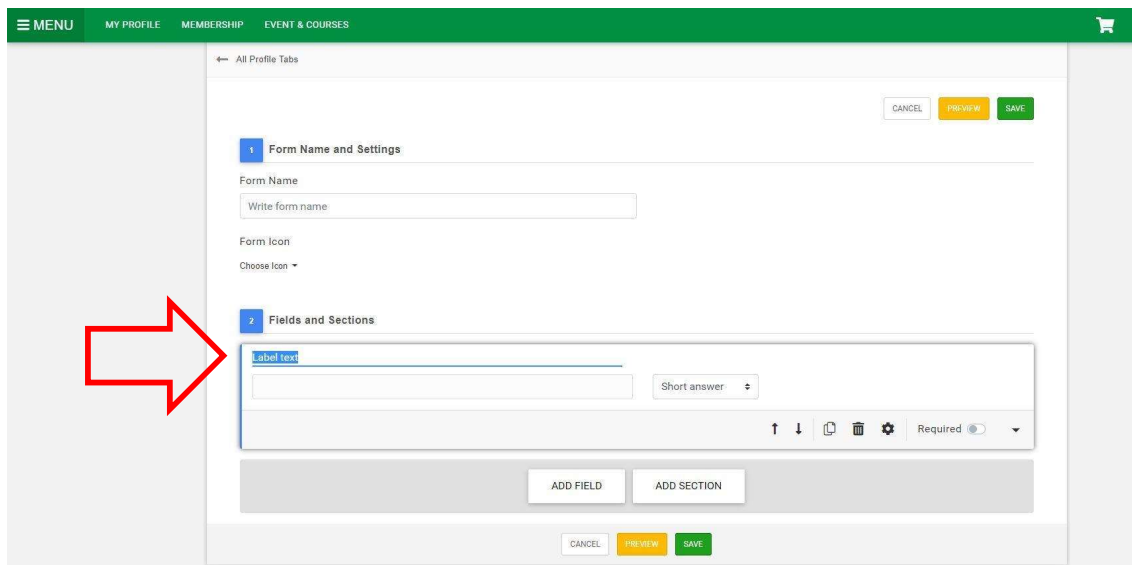
What are Fields?

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.
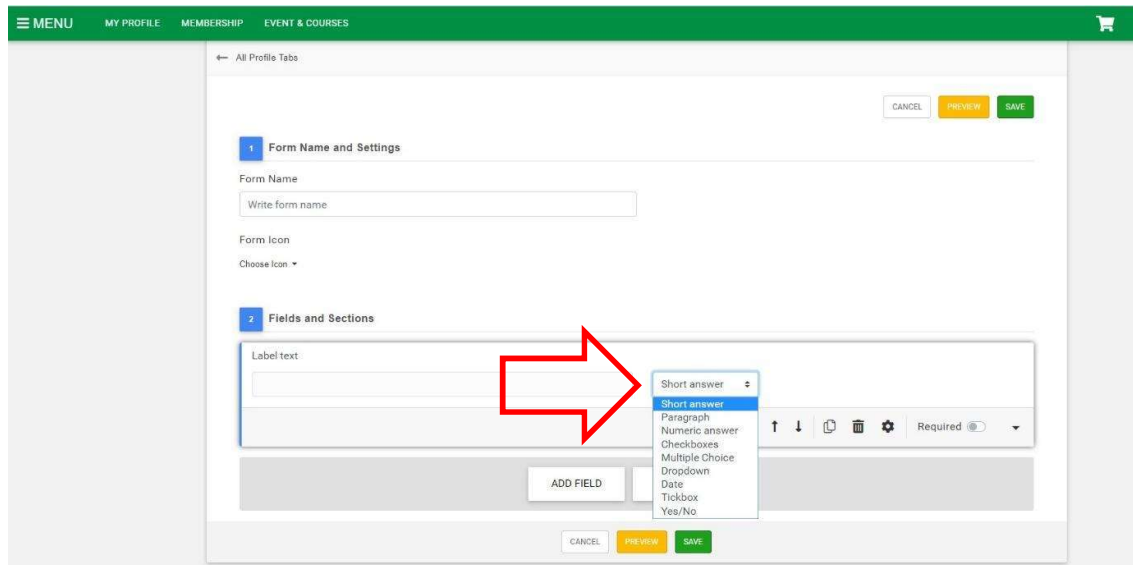

Enter the question you need the answer to, in the area indicated by the red arrow.

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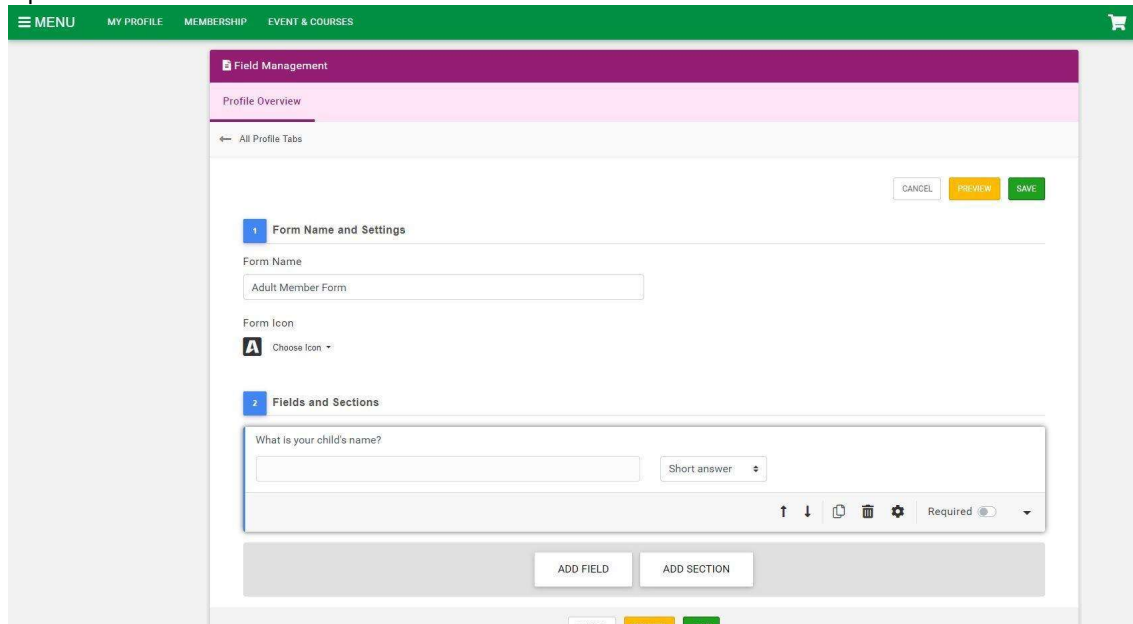There is a full description of each Field Type in the next section.

What are the Field Types?

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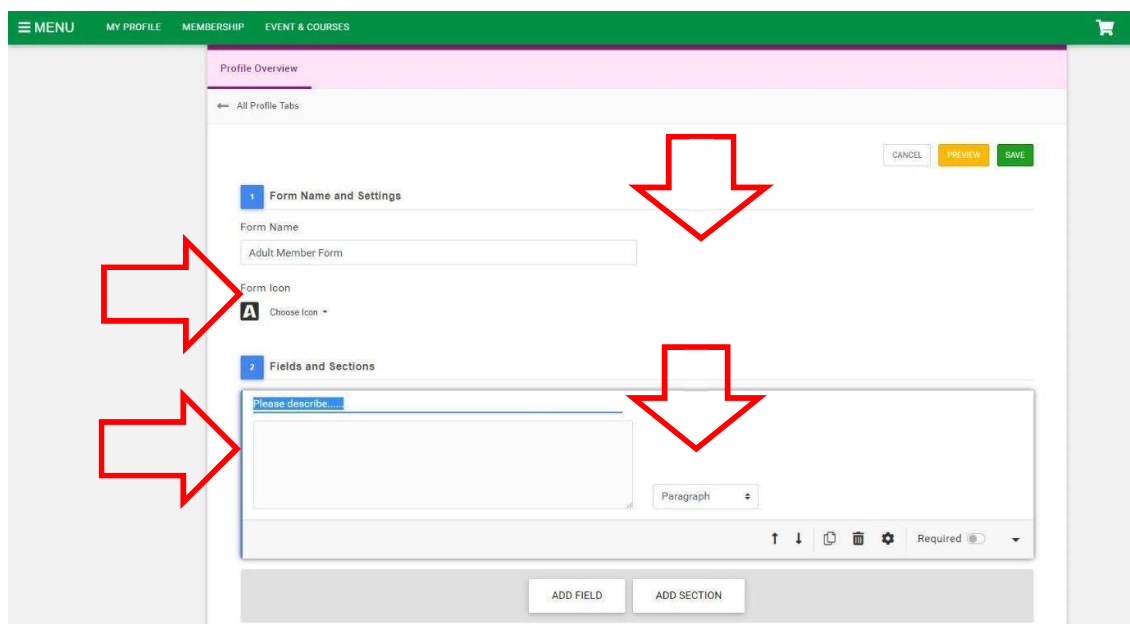
Short Answer

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.
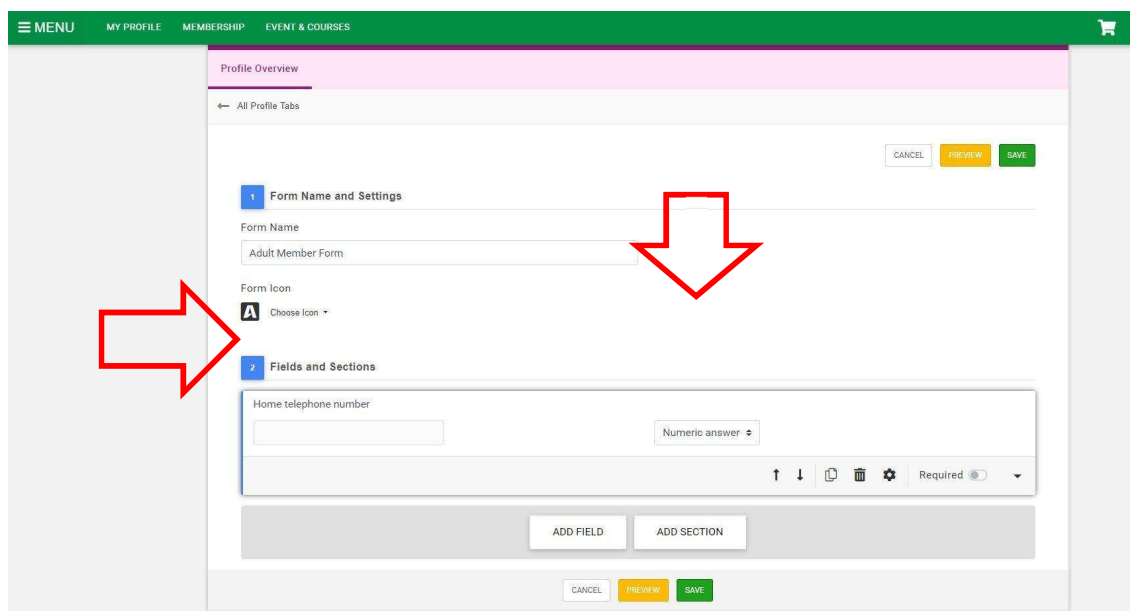
Numeric answer

This field is used for numeric answers only.
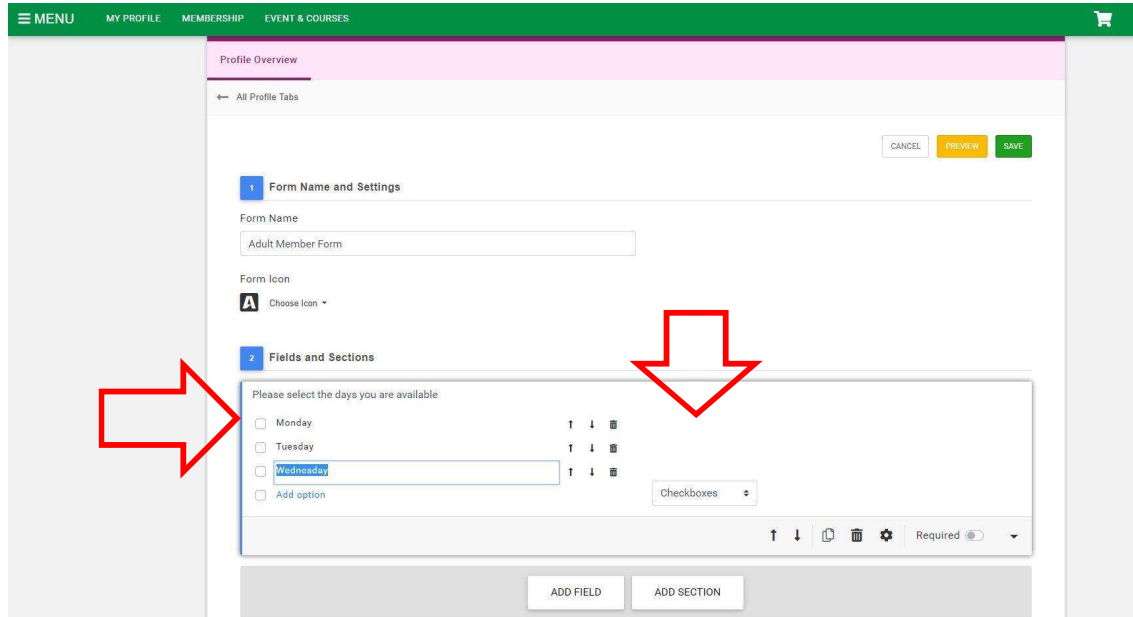
Checkboxes

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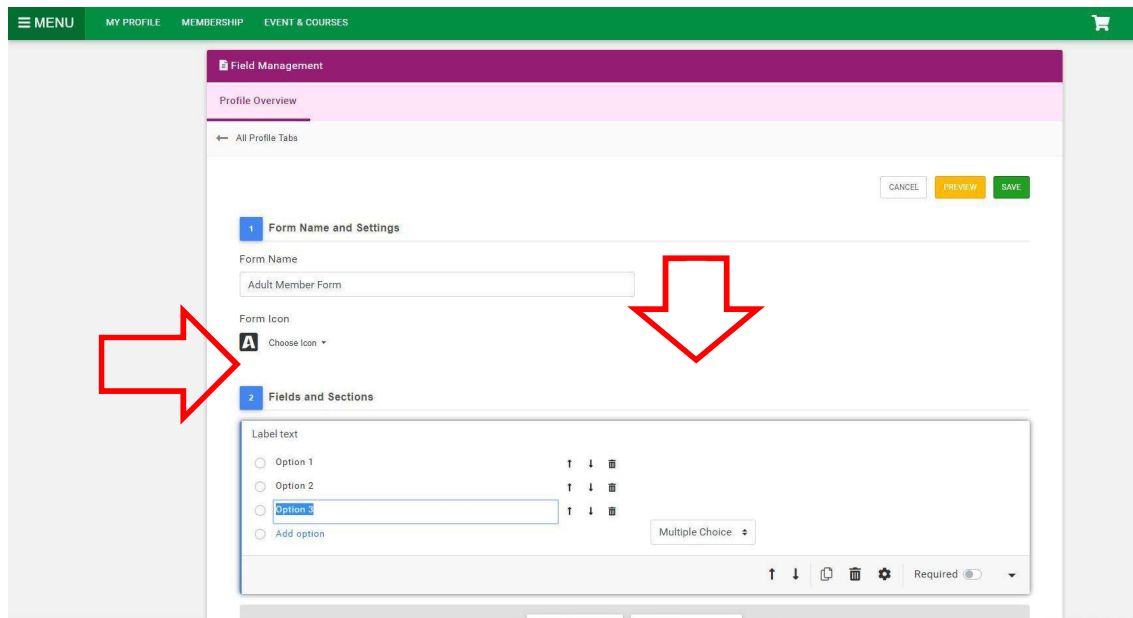
Multiple Choice

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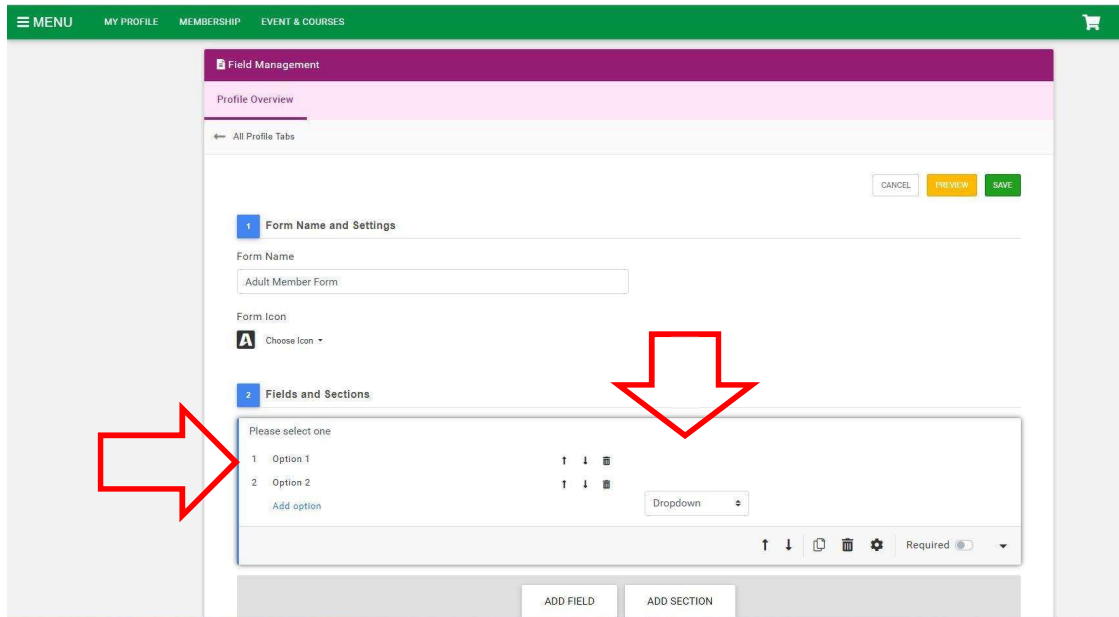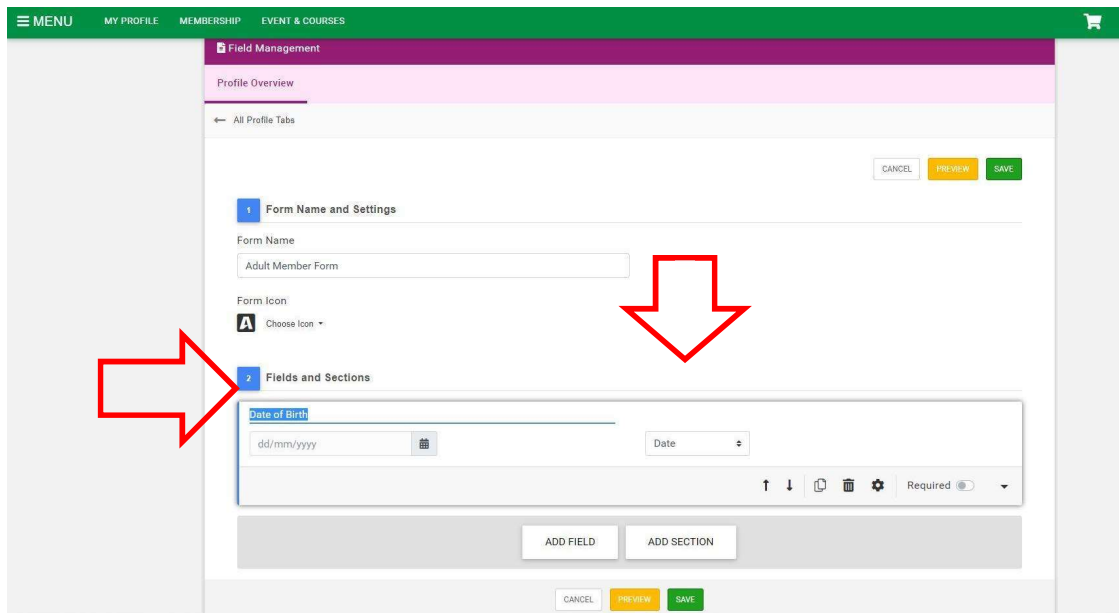
Dropdown

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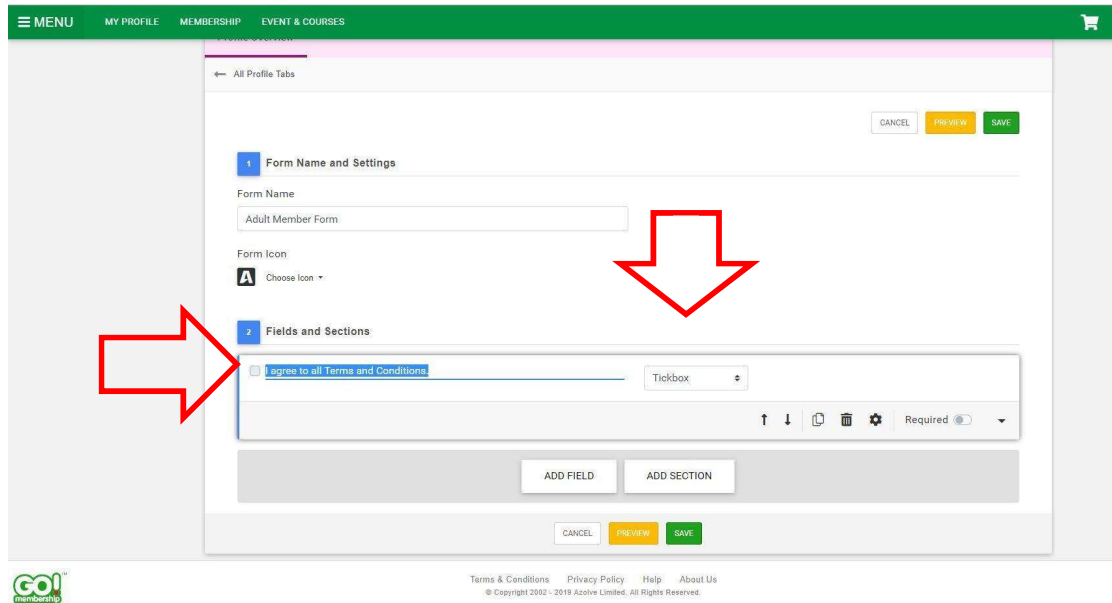
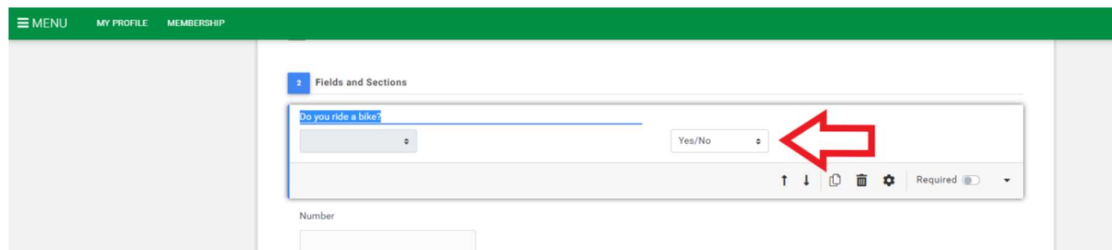
Date

This field is used for an exact date.

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.

Yes/No

This field is used for either a Yes or No answer to a specific question.
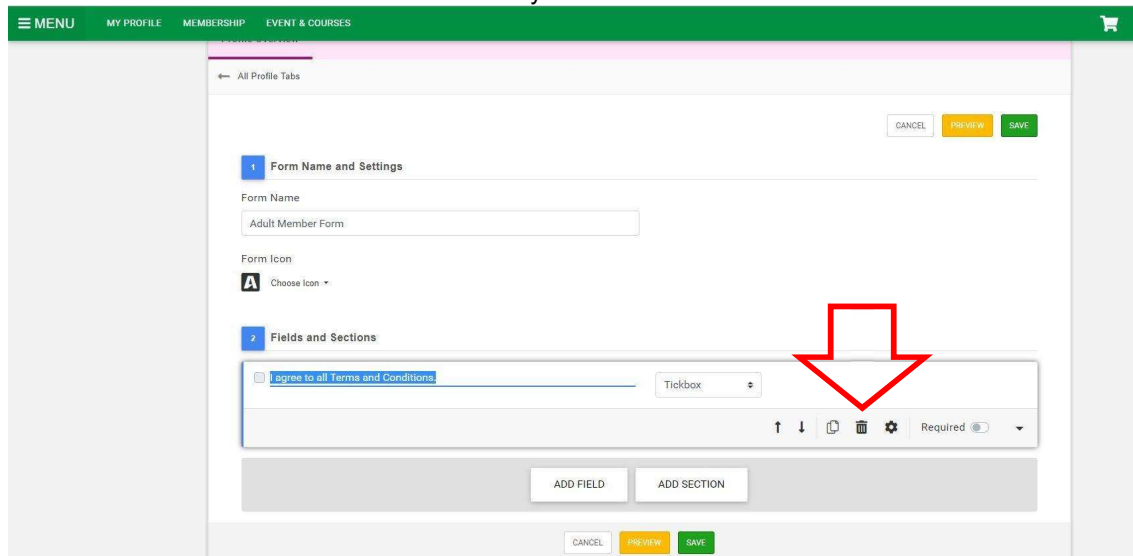
Can I change the sequence of Fields?

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.
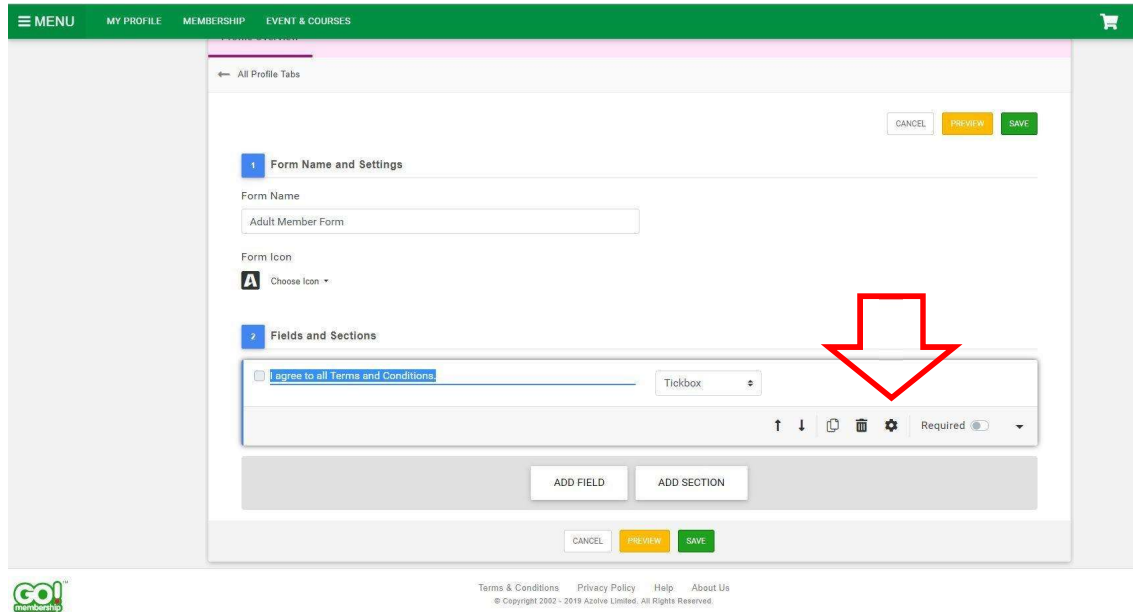

Can I delete a Field?

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.

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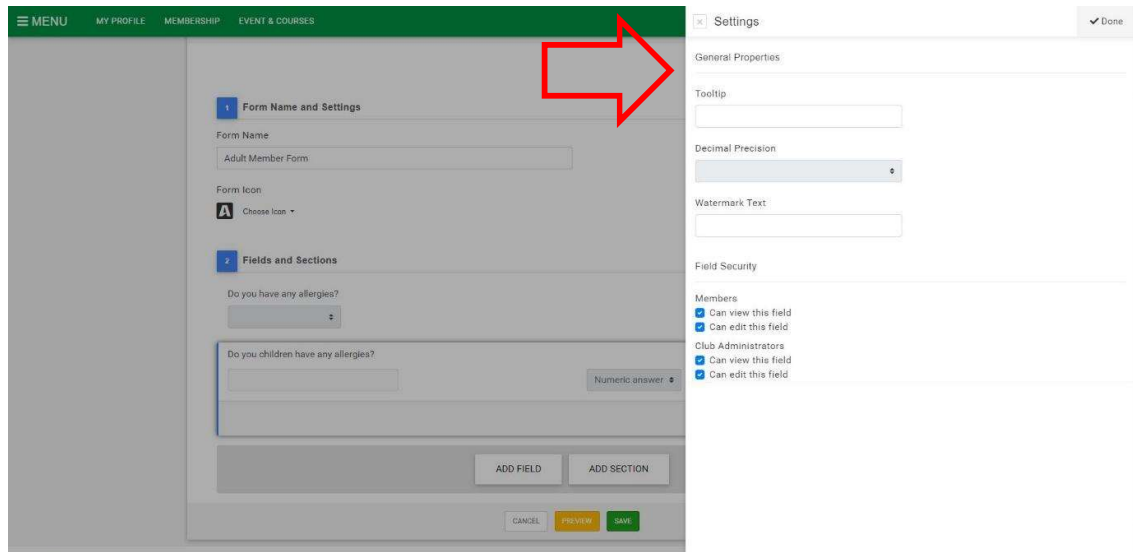
There are a few more options available. To access them click on the Settings icon indicated below.
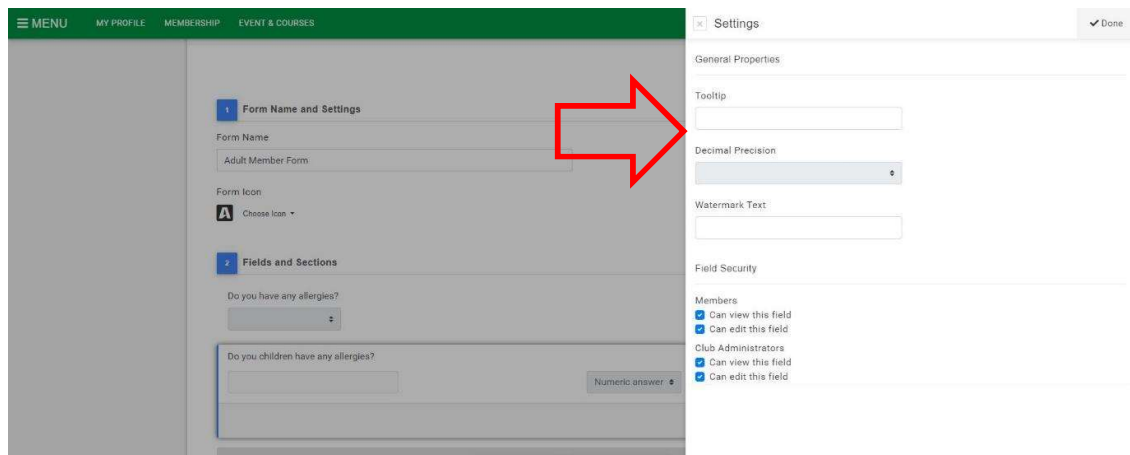

Tooltip

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.

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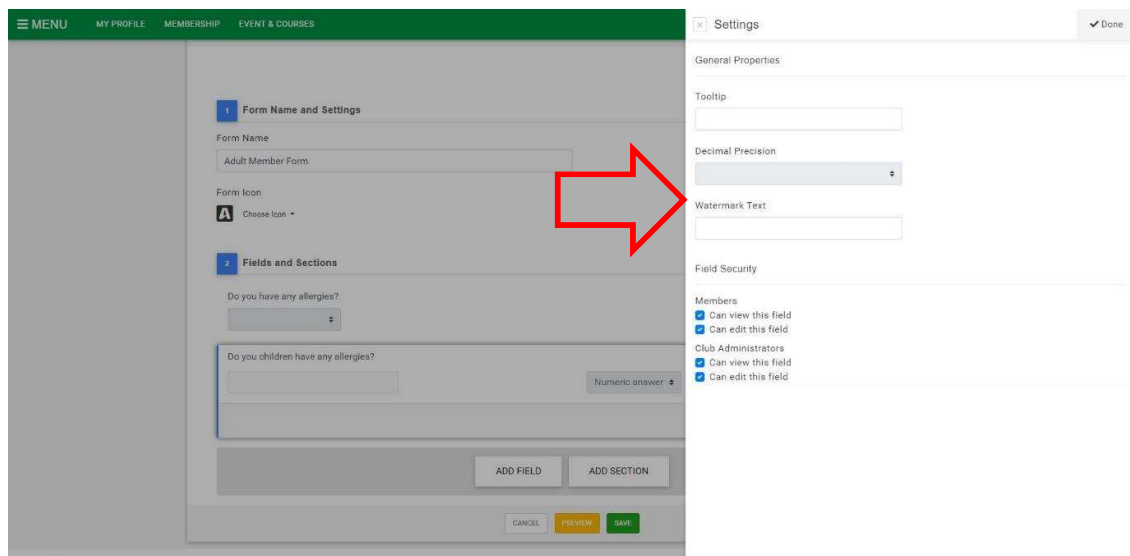
This is only available for Numeric answer type Fields. This allows you to set the number of decimal places required in the answer.
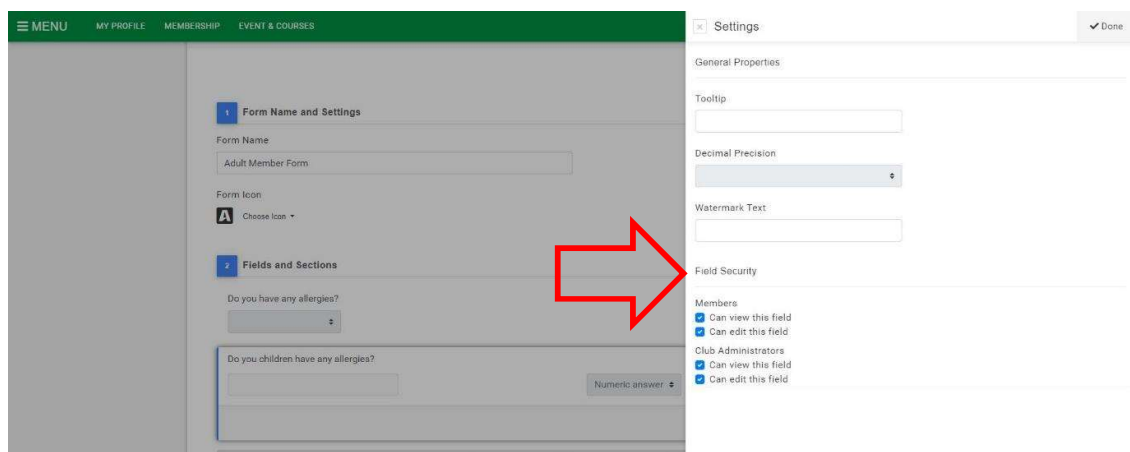

Watermark Text

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.

Field Security

This is used to control View and Edit permissions of the field.
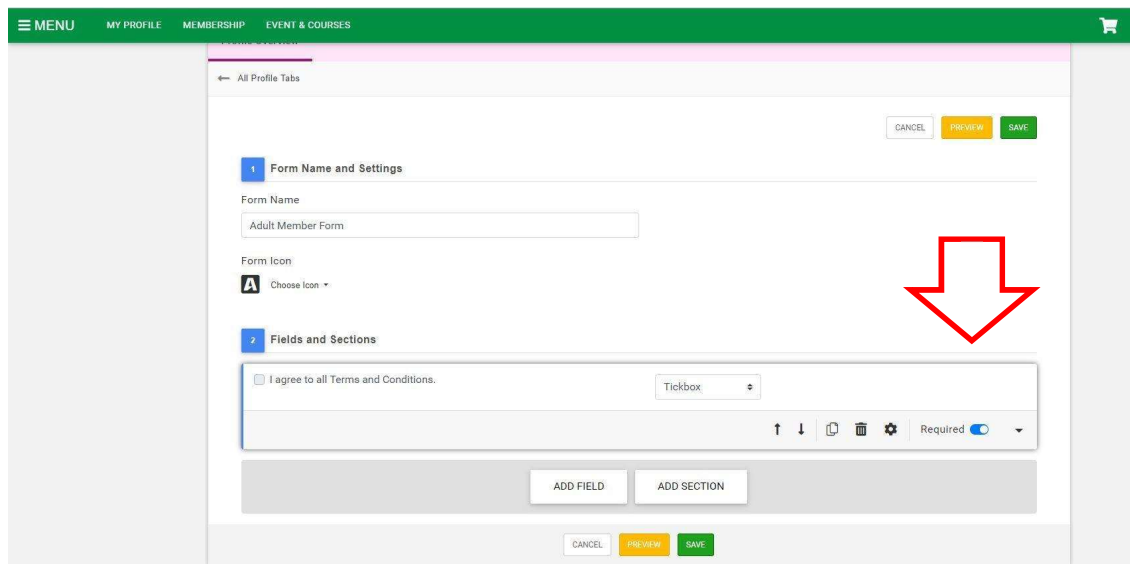
NOTE: Please click on Done at the top right corner to save the changes you made.

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.
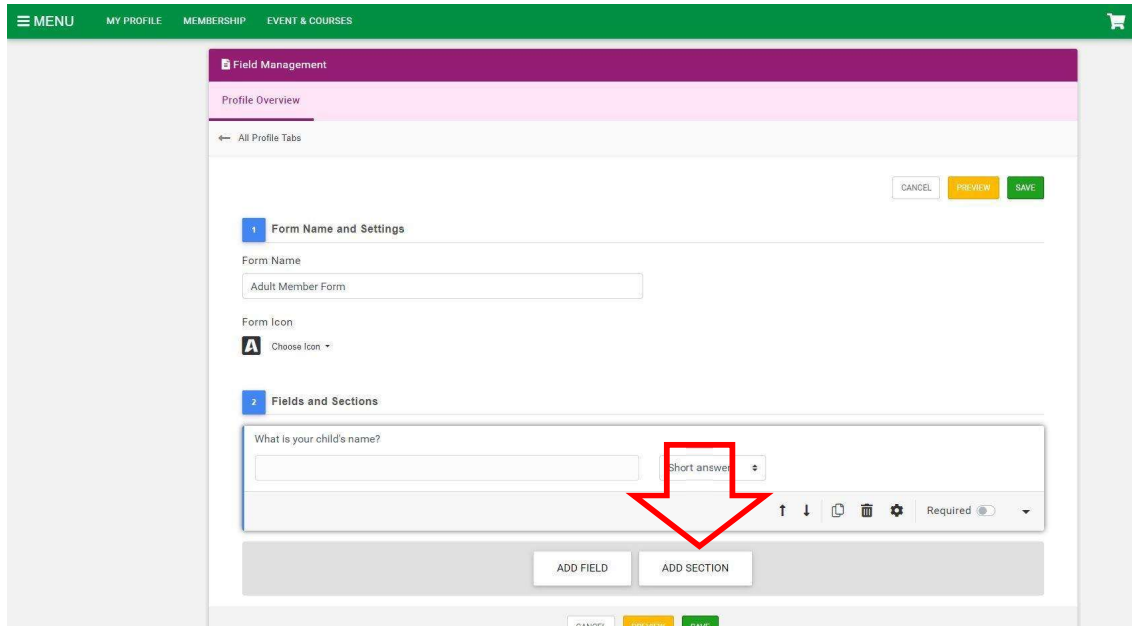

NOTE: If a Field has the required toggled on, it will be mandatory for all members. If you want to make it membership specific then please see page 17.
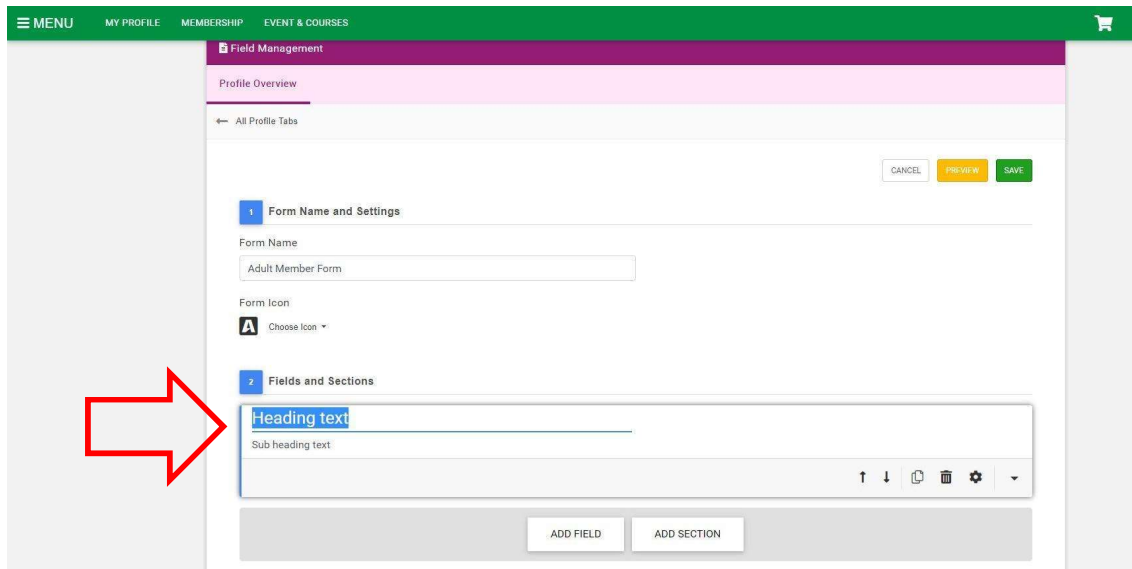
What are Sections?

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.

Sections consists of two parts, the heading and the sub-heading as indicated by the red arrow.
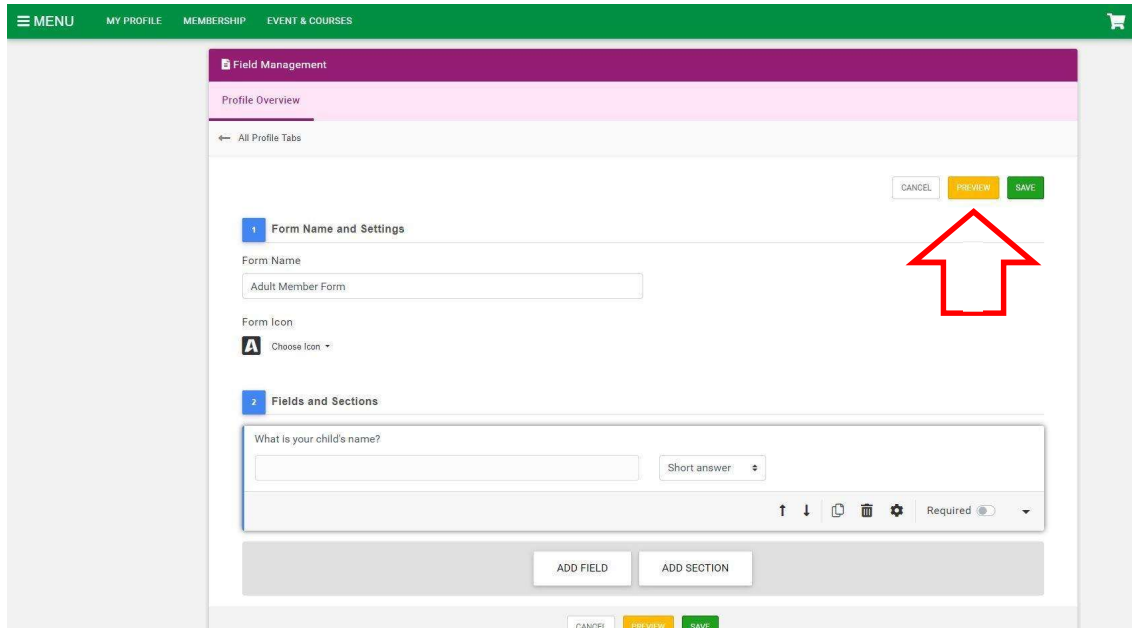
NOTE: You can use a Sub-heading as a way to highlight a point in the form.

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

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


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.

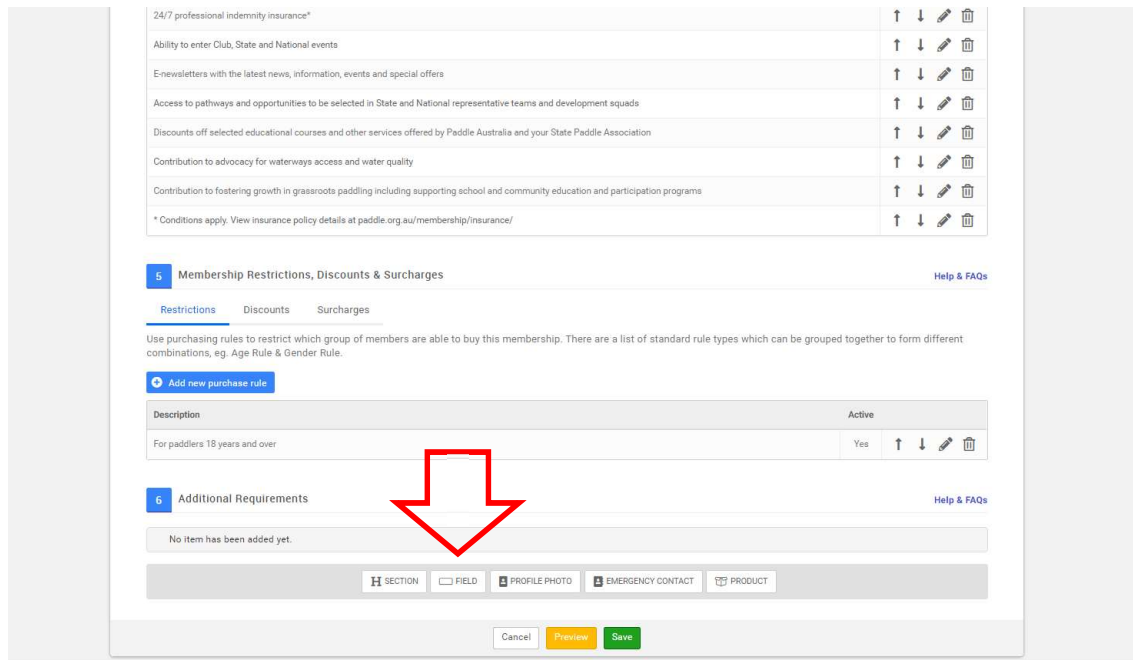## Can I create a Form for a specific membership only?

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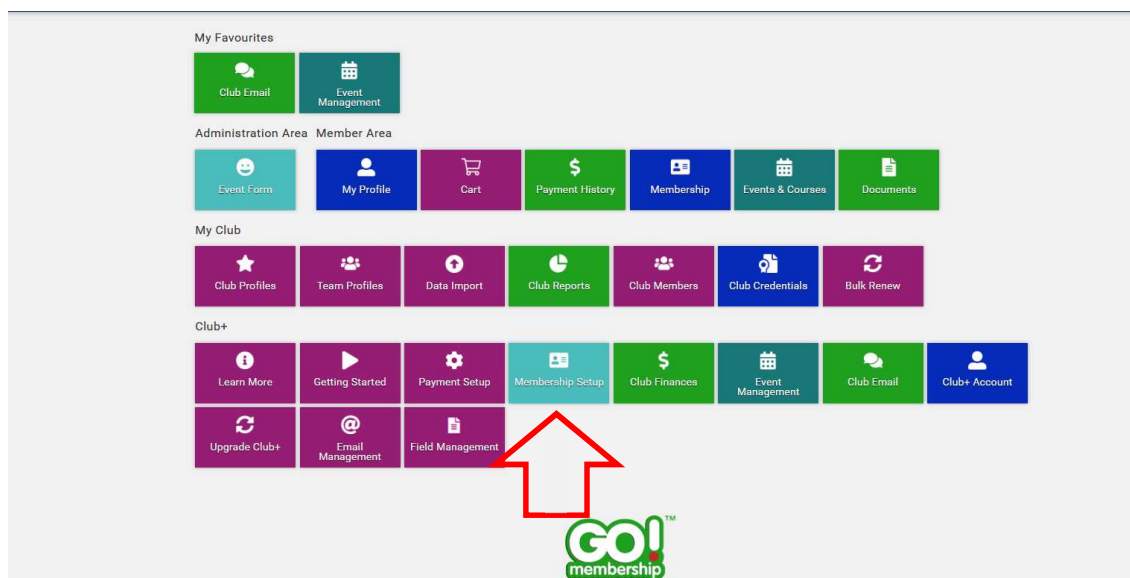
Click on the edit button next to the membership you created the field for.

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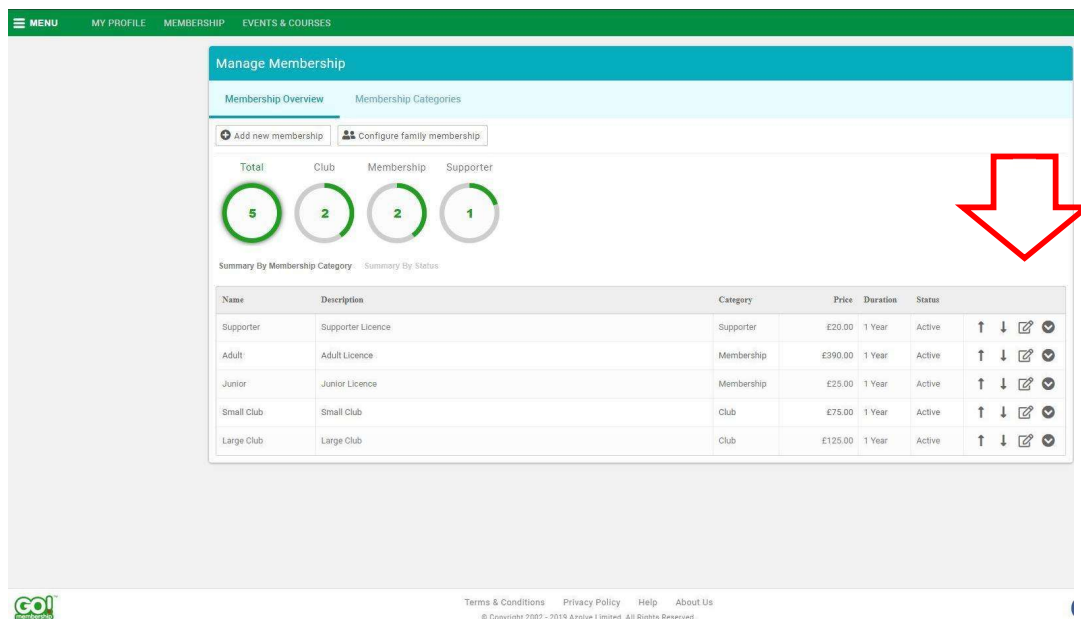
You can link the fields that you created in the Field Management section by clicking on the Field button indicated below.

Select the Field you want to import.

Once a Field has been linked, toggle the Required button to make it mandatory.
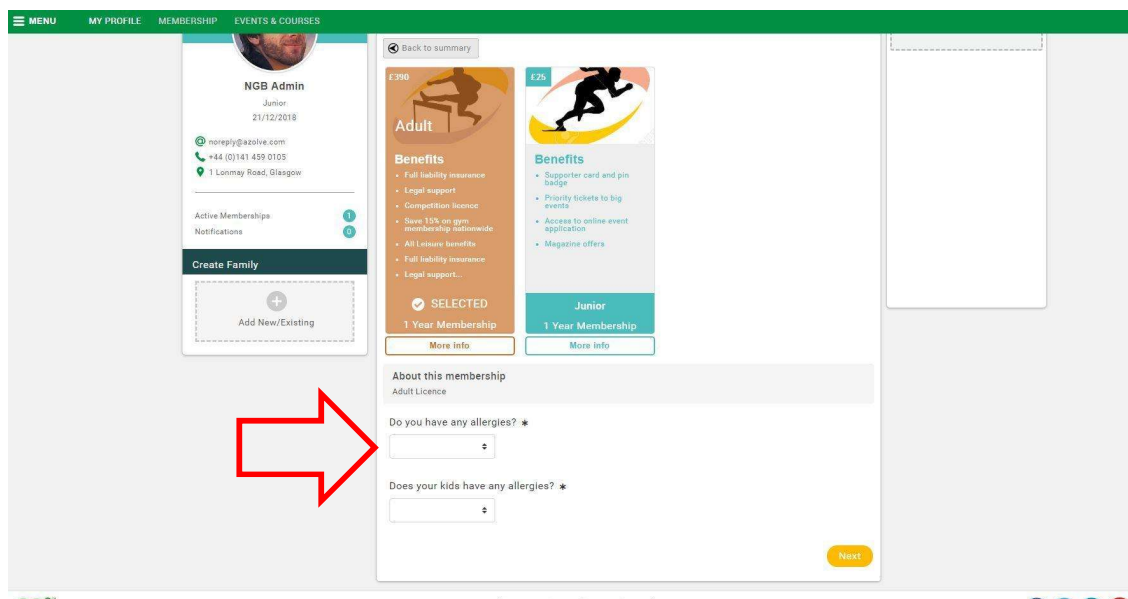
Fields linked here will show up on the membership journey i.e. when a user is trying to buy the membership, as indicated by the red arrow below.
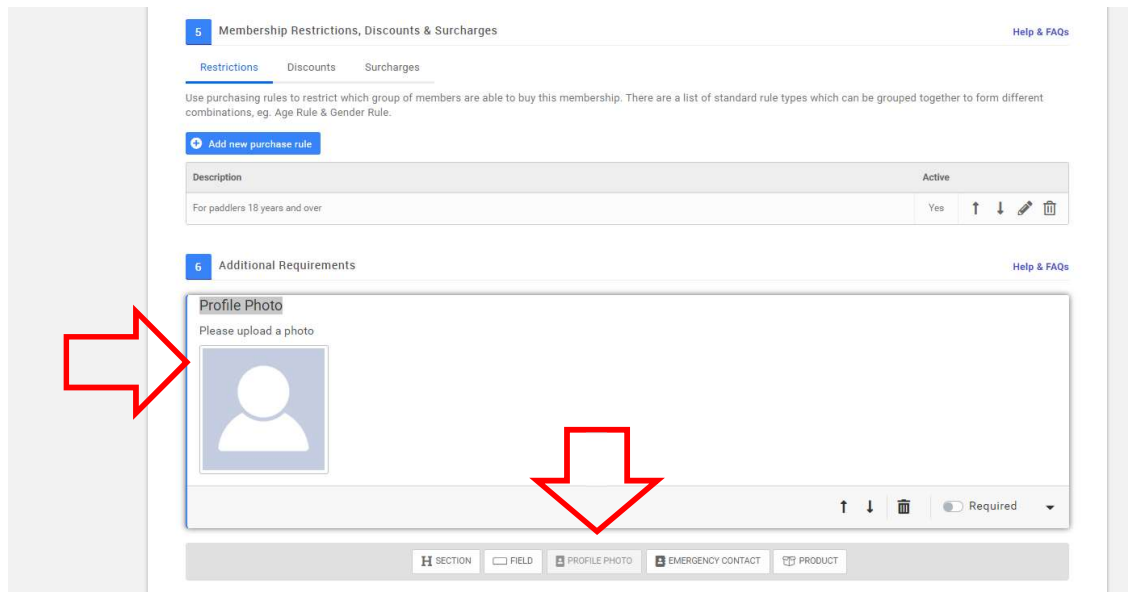
What else can I add in the Membership Journey?

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.
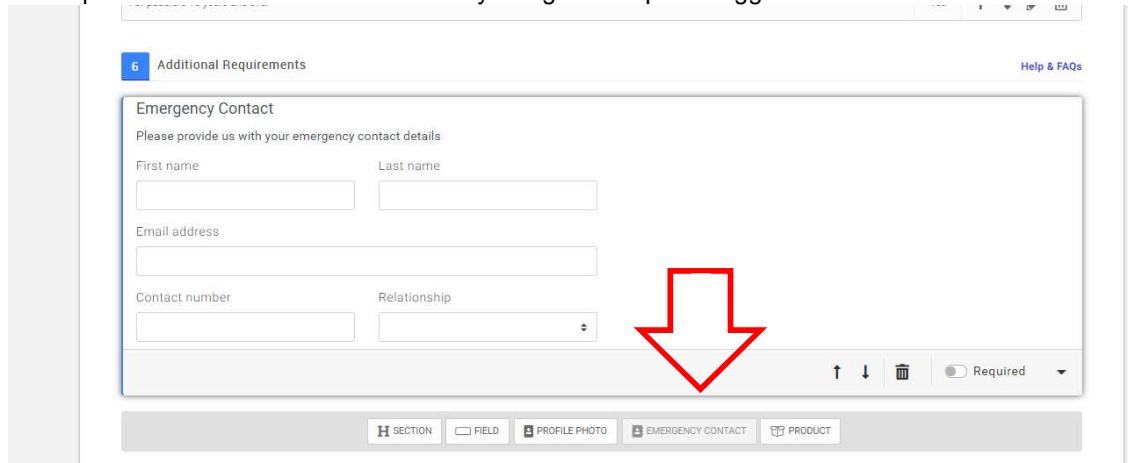
Emergency Contact

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.

Product

This field is used to offer other products in the membership journey as upsells, eg. merchandise, equipment, publications.
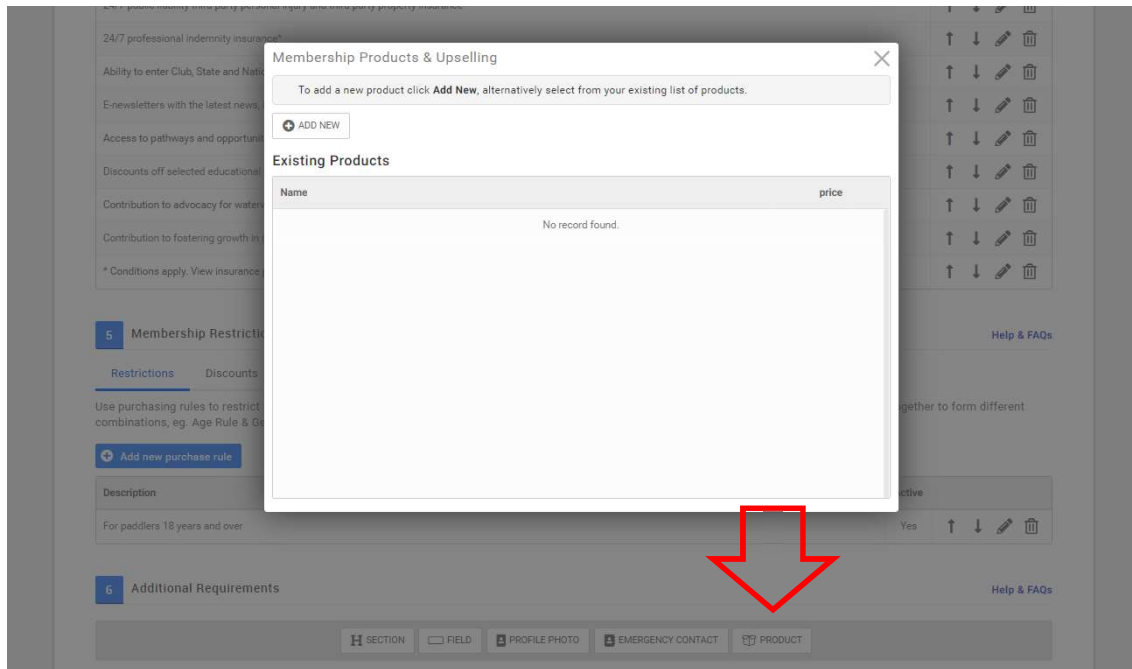
To add a product, please click on the Add New button and complete the Product Details i.e. Name, Description, Image, Price etc.
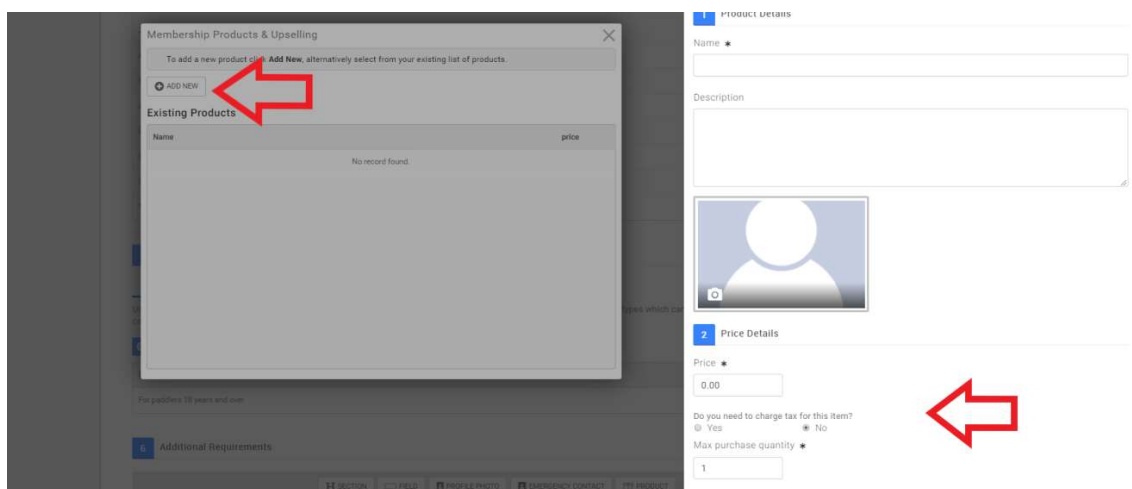
If the product is taxable, select yes and add the tax rate. Save the tax options, and then select Done to save the Product.

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 environ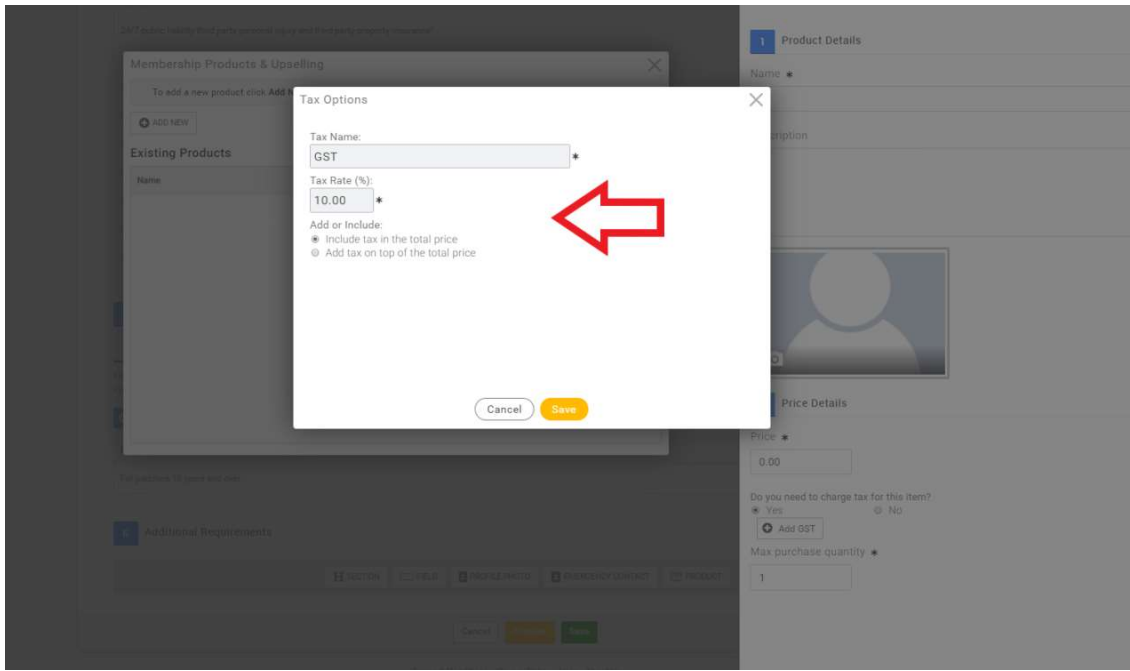ment, they have been restricted from being edited. If you need to change them, then a service request must be raised at the Service Desk.

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.
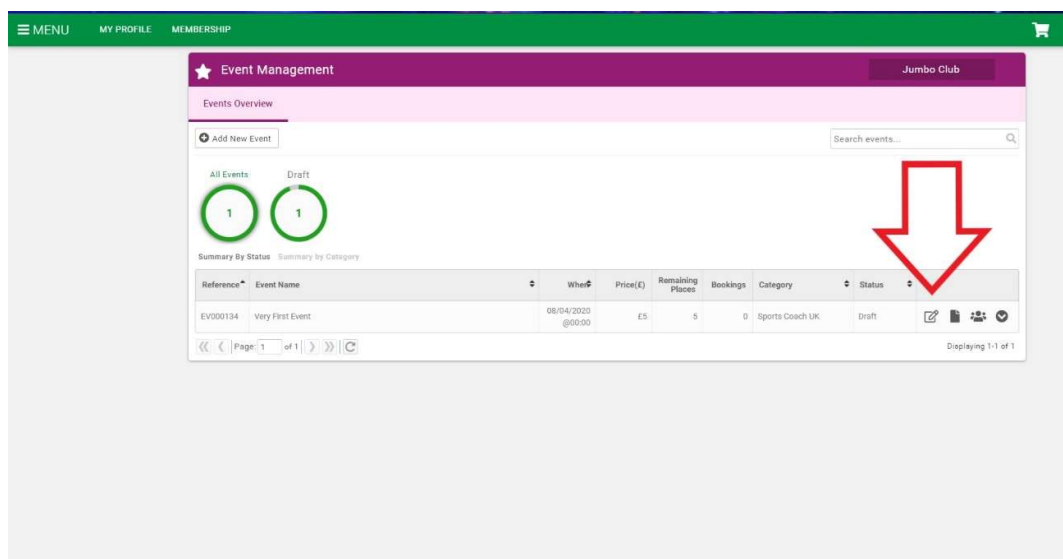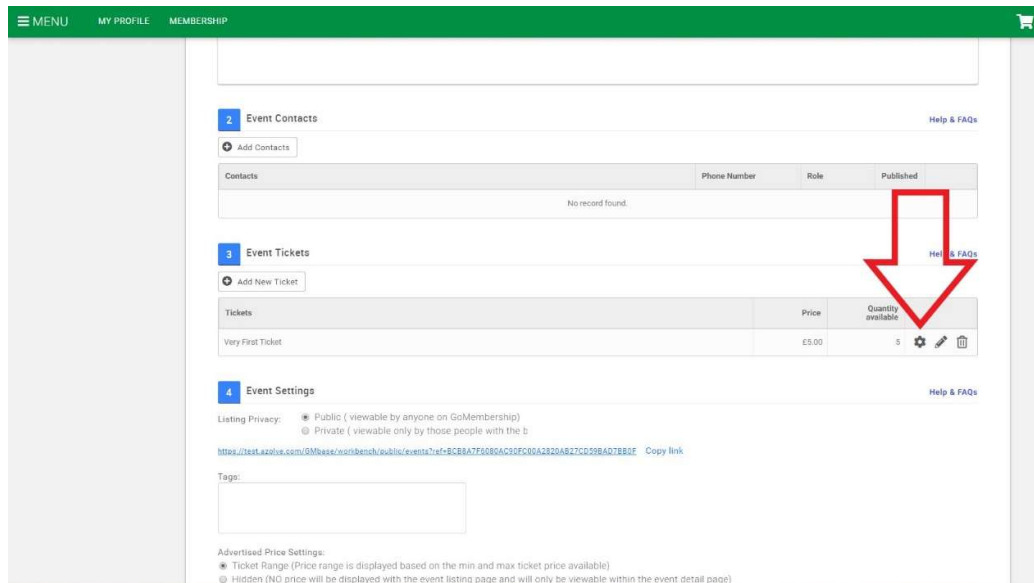
How do I add a Form to a ticket?

You can add a form created in Field Management to an event ticket through the Event Management tile.
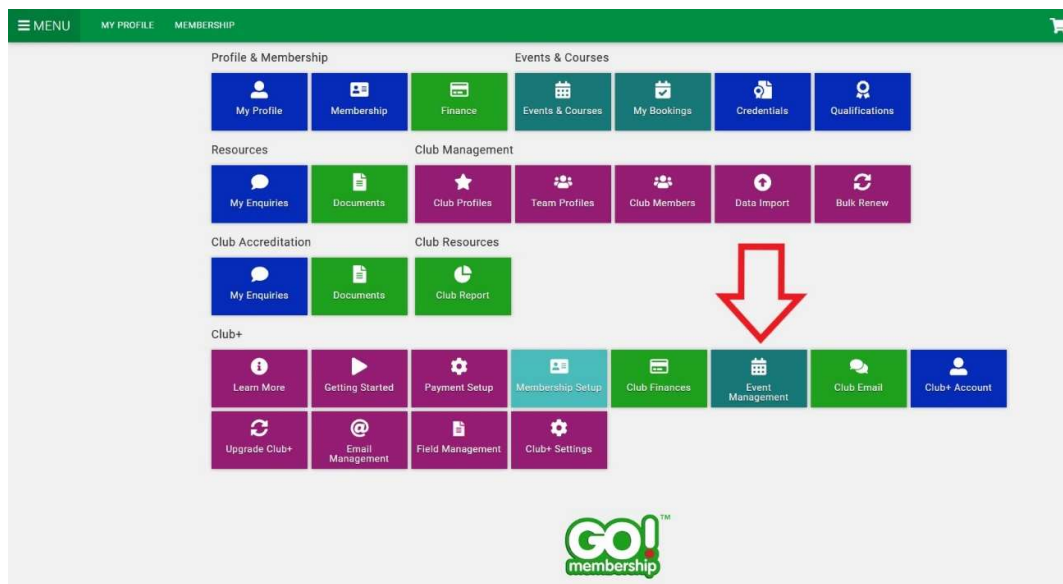
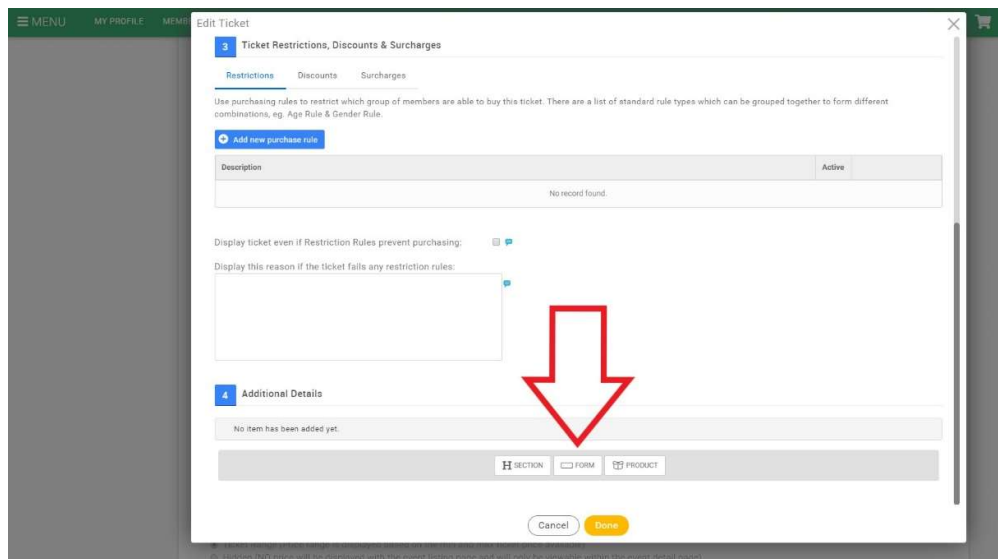Click on the edit button next to the event you created the ticket form for.

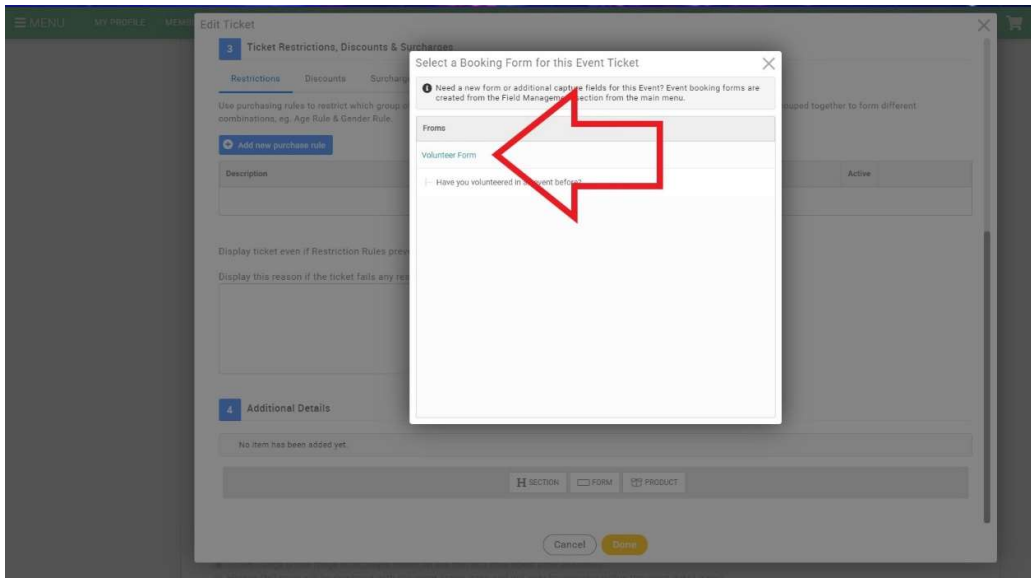Scroll down to Section 3 and click on the Advance Setting button of the ticket.

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

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

The chosen form will be imported.
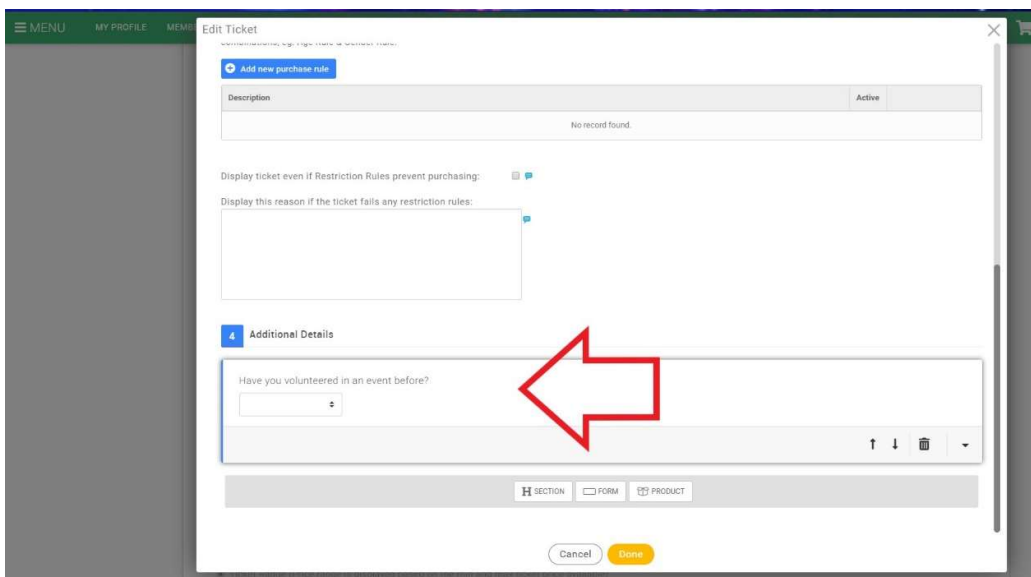
Note: Click on Done to save your changes.