

Club+ Field Management FAQs

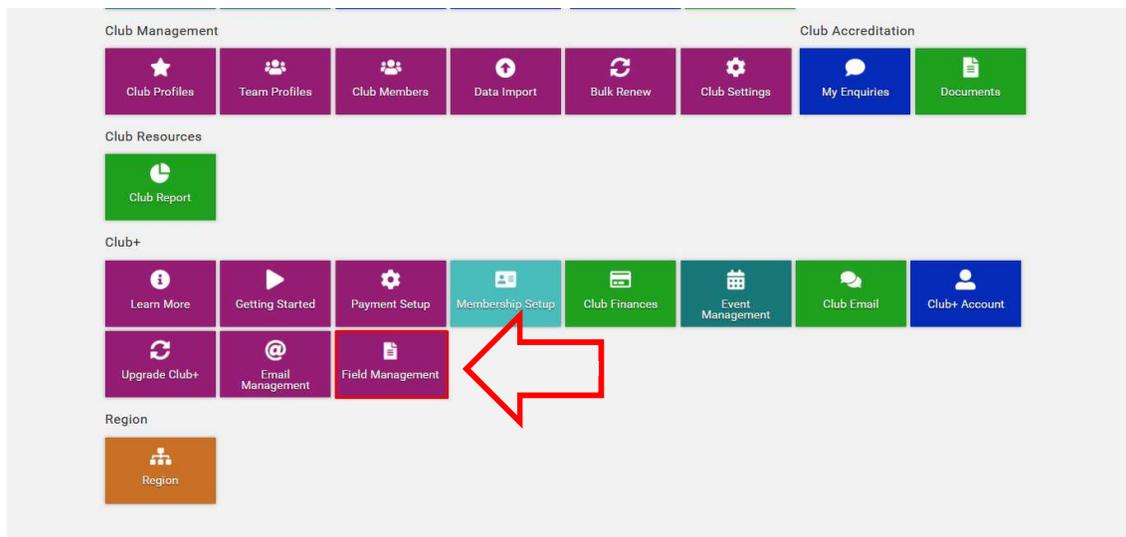
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What is Field Management?

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.

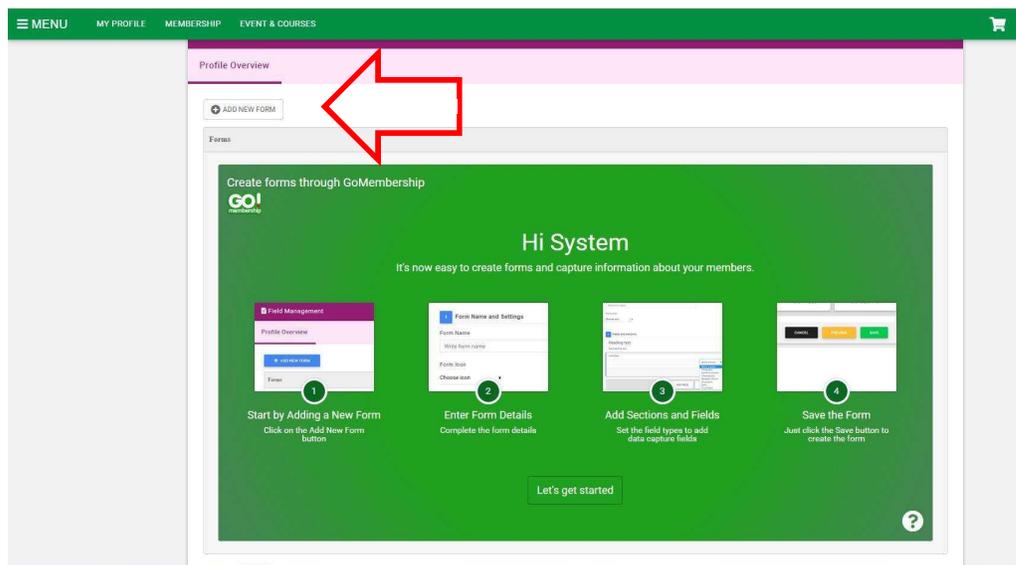
How do I access Field Management?

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.

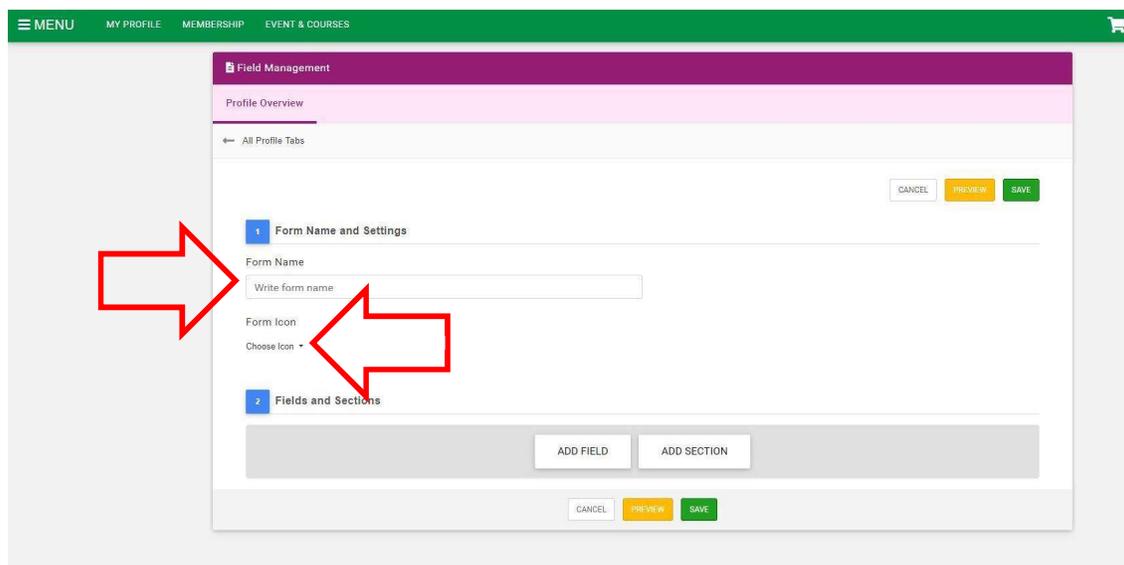


What are Forms?

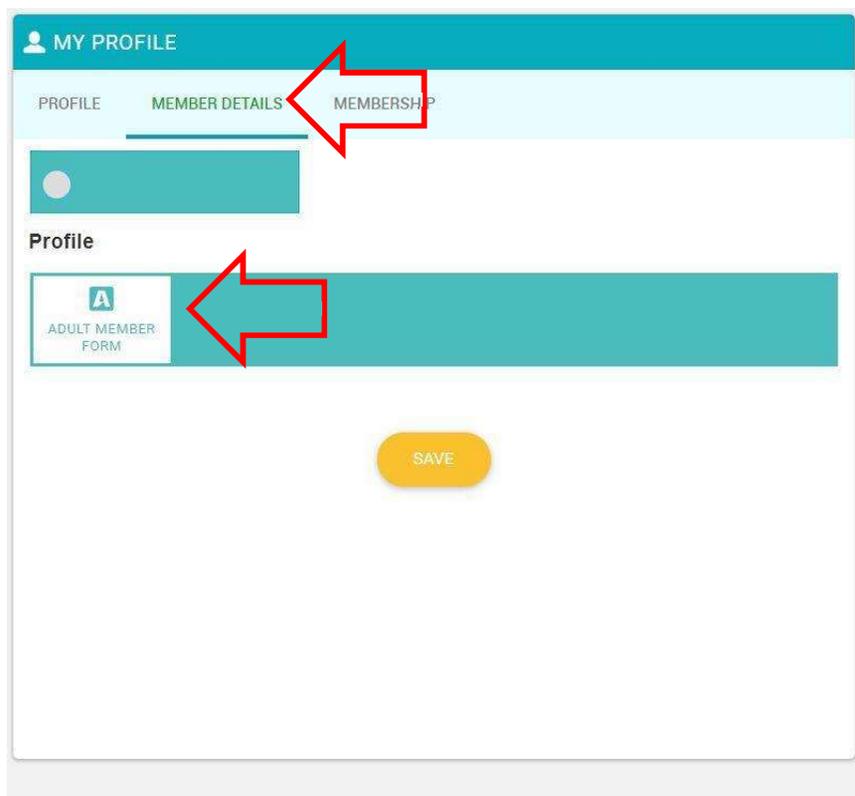
Forms are sets of Fields and Sections. These forms will let you gather more information from your members, for example - playing level, competition experience, personal information. You can create a new Form by clicking on the Add New Form button, indicated by the red arrow below.



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.



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.

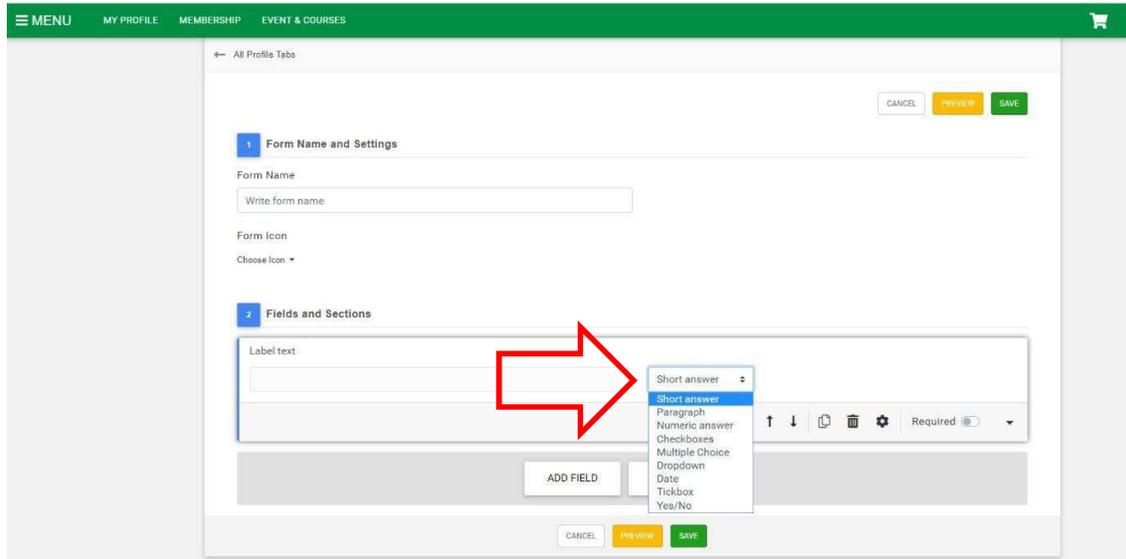
To add a new Field, click on the Add Field button indicated by the red arrow below.

The screenshot shows the 'Field Management' interface. At the top, there is a navigation bar with 'MENU', 'MY PROFILE', 'MEMBERSHIP', and 'EVENT & COURSES'. Below this is a 'Field Management' header with a 'Profile Overview' sub-header. 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 is a 'Form Name' input field with the placeholder text 'Write form name' and a 'Form Icon' dropdown menu with the text 'Choose icon'. In the 'Fields and Sections' section, there are two buttons: 'ADD FIELD' and 'ADD SECTION'. A red arrow points to the 'ADD FIELD' button. At the bottom of the main content area, there are '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, specifically the 'Fields and Sections' section. The 'Form Name and Settings' section is visible at the top. In the 'Fields and Sections' section, there is a 'Label text' input field with a red arrow pointing to it. To the right of the input field is a dropdown menu with the text 'Short answer'. Below the input field and dropdown menu are icons for up/down arrows, a trash can, a gear, and a 'Required' toggle switch. At the bottom of the main content area, there are 'ADD FIELD' and 'ADD SECTION' buttons. At the very bottom, there are '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.

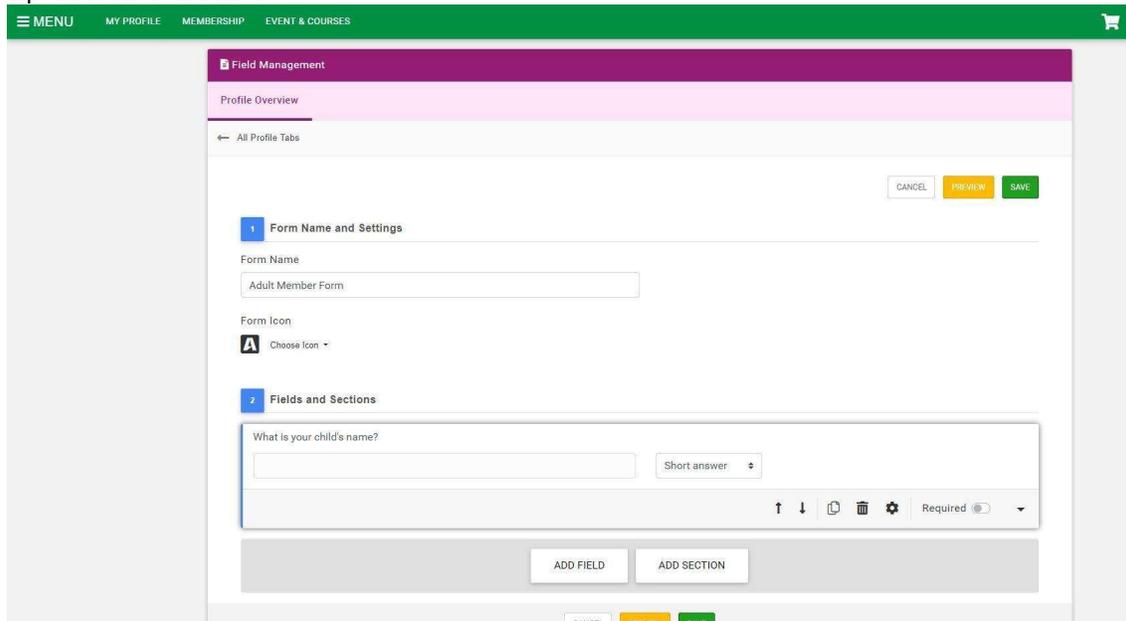


What are the Field Types?

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.

The screenshot shows the 'Profile Overview' form editor interface. At the top, there is a navigation bar with 'MENU', 'MY PROFILE', 'MEMBERSHIP', and 'EVENT & COURSES'. Below this, the 'Profile Overview' section is active, showing 'All Profile Tabs'. The form is divided into two main sections: '1 Form Name and Settings' and '2 Fields and Sections'. In the 'Form Name and Settings' section, the 'Form Name' is 'Adult Member Form' and the 'Form Icon' is 'Choose Icon'. In the 'Fields and Sections' section, a new field is being added with the label 'Please describe...'. The field type is set to 'Paragraph'. There are 'ADD FIELD' and 'ADD SECTION' buttons at the bottom of the field configuration area. Red arrows point to the 'Form Name' field, the 'Form Icon' dropdown, the 'Please describe...' text area, and the 'Paragraph' field type dropdown.

Numeric answer

This field is used for numeric answers only.

The screenshot shows the 'Profile Overview' form editor interface, similar to the previous one. In the 'Fields and Sections' section, a new field is being added with the label 'Home telephone number'. The field type is set to 'Numeric answer'. There are 'ADD FIELD' and 'ADD SECTION' buttons at the bottom of the field configuration area. Red arrows point to the 'Form Icon' dropdown and the 'Home telephone number' text area.

Checkboxes

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

The screenshot shows the 'Profile Overview' form editor. The 'Form Name and Settings' section is at the top, with 'Form Name' set to 'Adult Member Form'. Below it is the 'Fields and Sections' section. A new field is being added with the label 'Please select the days you are available'. The field contains a list of days: Monday, Tuesday, Wednesday, and an 'Add option' button. The 'Wednesday' option is selected. To the right of the list are icons for up/down arrows and a trash icon. Below the list is a dropdown menu set to 'Checkboxes'. At the bottom right of the field are icons for up/down arrows, a trash icon, a settings gear, and a 'Required' toggle. At the bottom of the field editor are 'ADD FIELD' and 'ADD SECTION' buttons. A red arrow points to the 'Add option' button, and another red arrow points to the 'Checkboxes' dropdown menu.

Multiple Choice

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

The screenshot shows the 'Field Management' form editor. The 'Form Name and Settings' section is at the top, with 'Form Name' set to 'Adult Member Form'. Below it is the 'Fields and Sections' section. A new field is being added with the label 'Label text'. The field contains a list of options: Option 1, Option 2, Option 3, and an 'Add option' button. The 'Option 3' option is selected. To the right of the list are icons for up/down arrows and a trash icon. Below the list is a dropdown menu set to 'Multiple Choice'. At the bottom right of the field are icons for up/down arrows, a trash icon, a settings gear, and a 'Required' toggle. At the bottom of the field editor are 'ADD FIELD' and 'ADD SECTION' buttons. A red arrow points to the 'Add option' button, and another red arrow points to the 'Multiple Choice' dropdown menu.

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. Under the 'Fields and Sections' section, a dropdown field is being configured. The field name is 'Date of Birth'. The options are 'Option 1' and 'Option 2'. The field type is set to 'Dropdown'. A red arrow points to the 'Fields and Sections' section, and another red arrow points to the dropdown field.

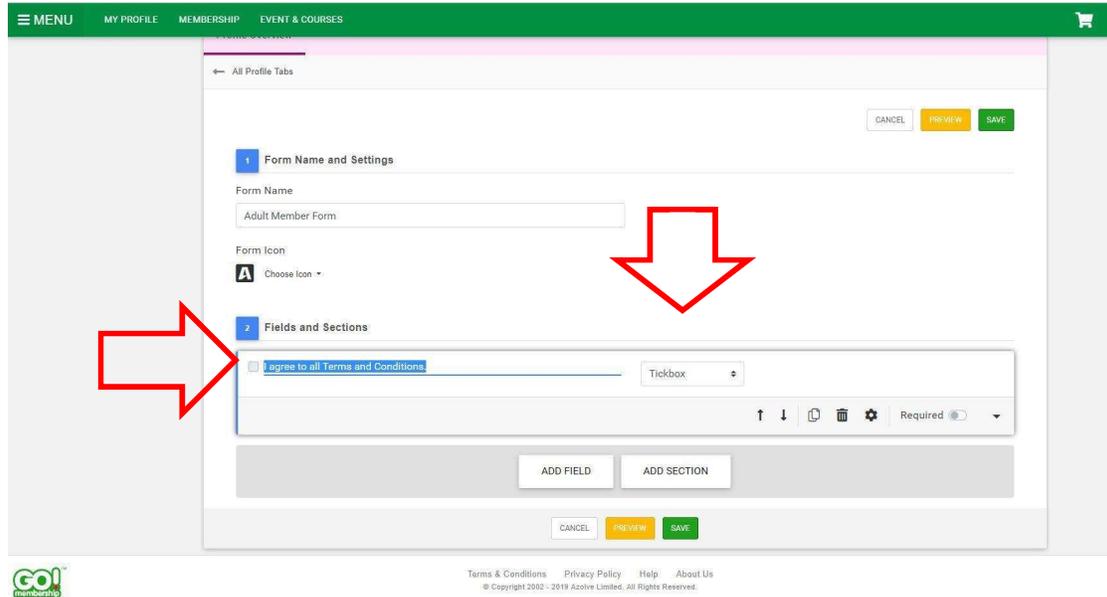
Date

This field is used for an exact date.

The screenshot shows the 'Field Management' interface. Under the 'Fields and Sections' section, a date field is being configured. The field name is 'Date of Birth'. The field type is set to 'Date'. A red arrow points to the 'Fields and Sections' section, and another red arrow points to the date field.

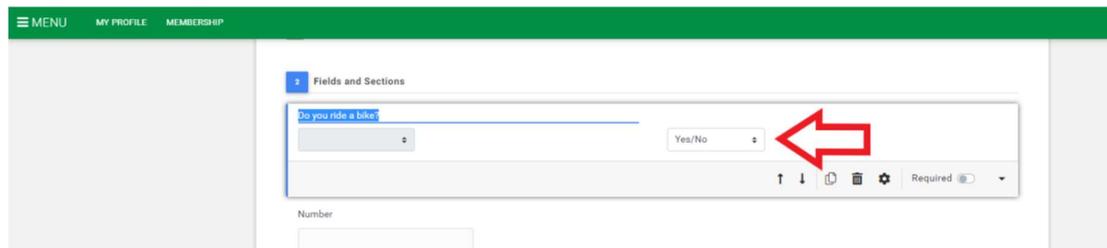
Tickbox

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



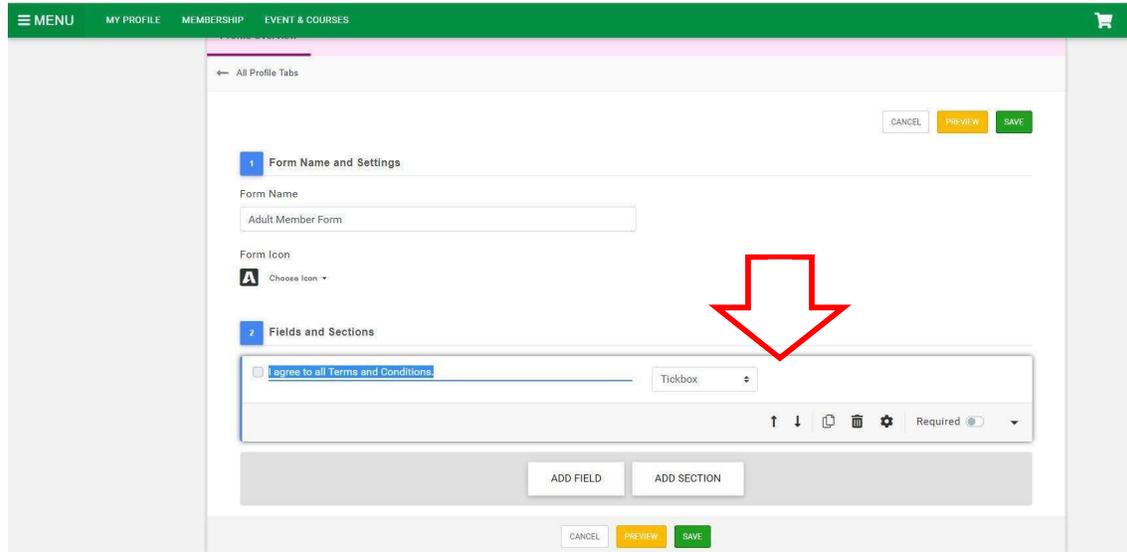
Yes/No

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



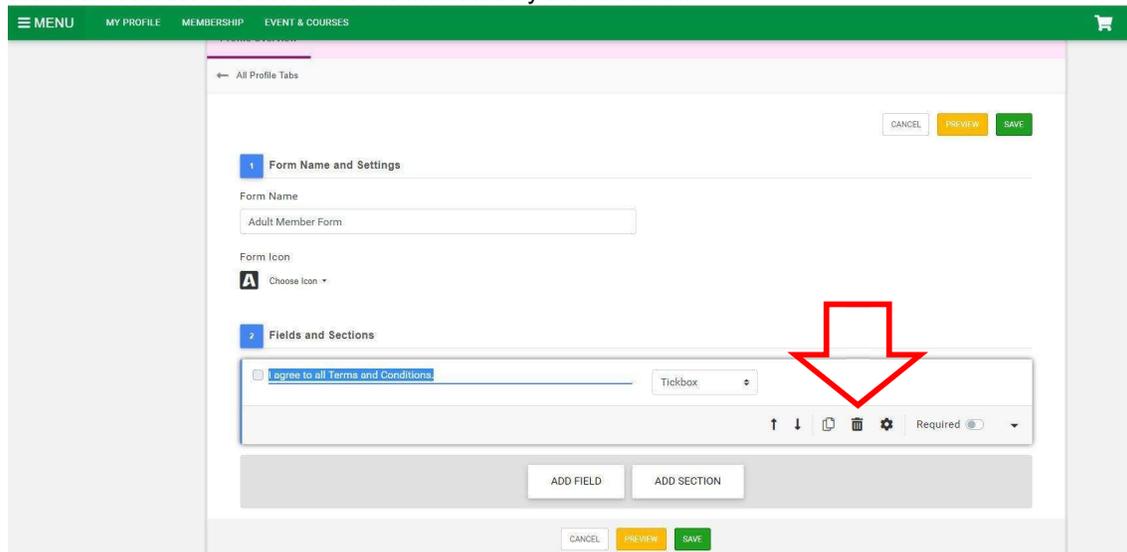
Can I change the sequence of Fields?

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.



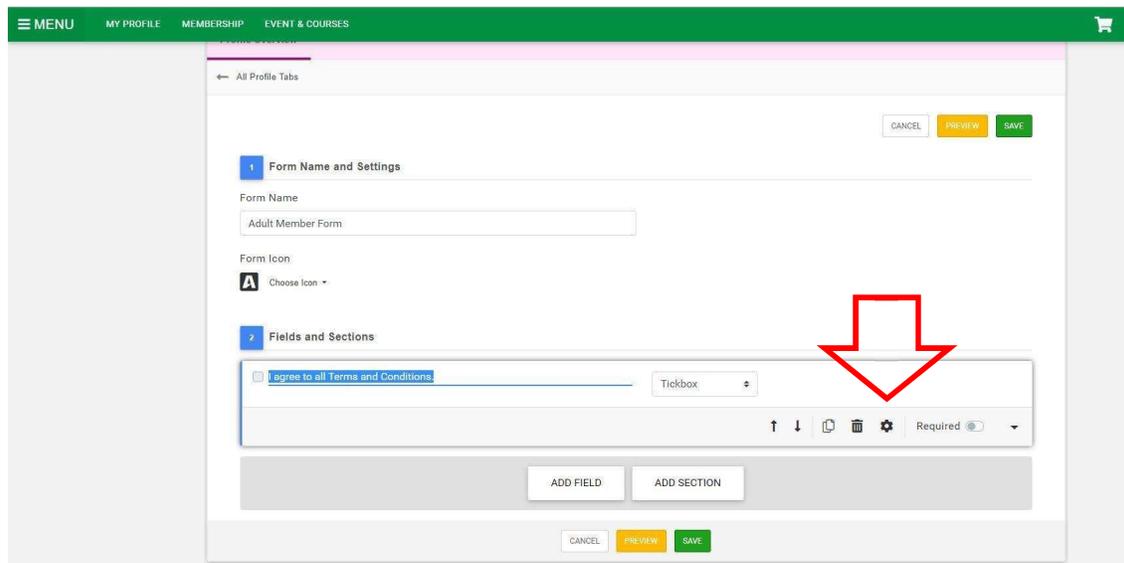
Can I delete a Field?

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.



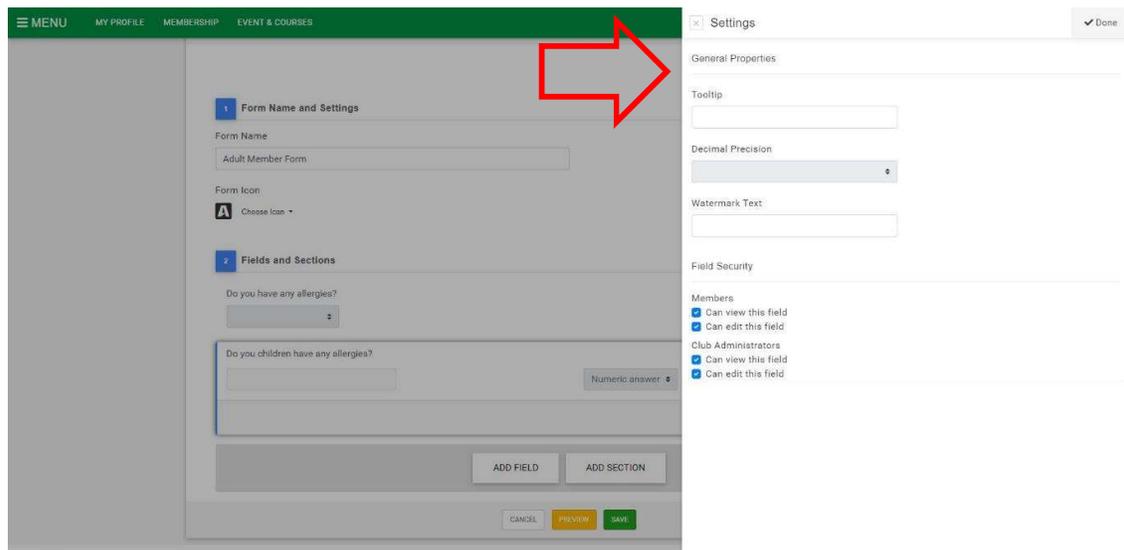
What other options are available?

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



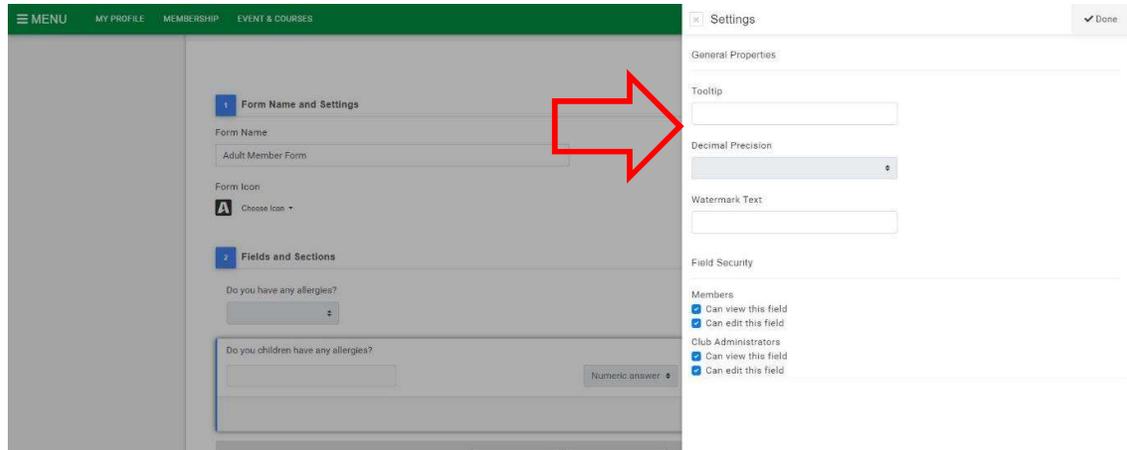
Tooltip

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.



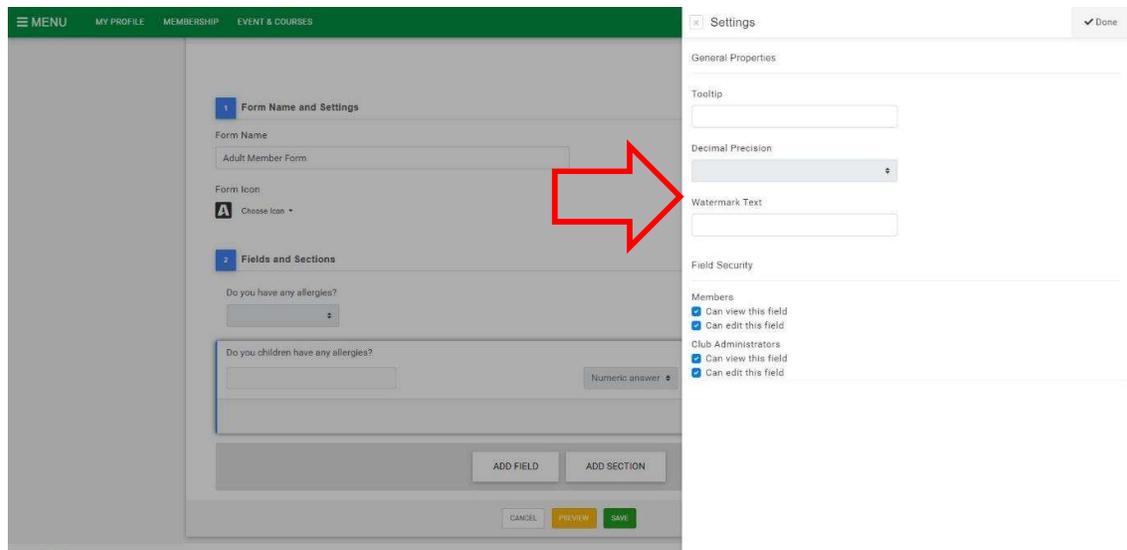
Decimal Precision

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



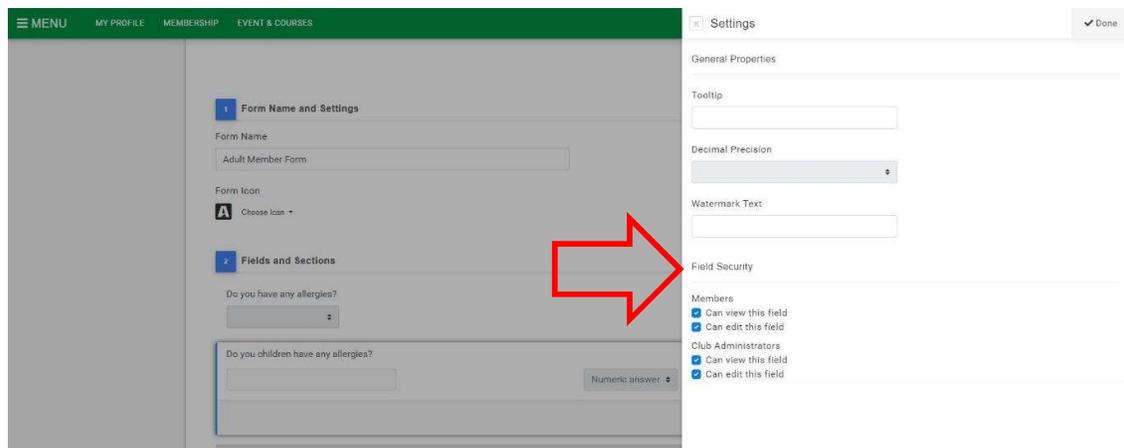
Watermark Text

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

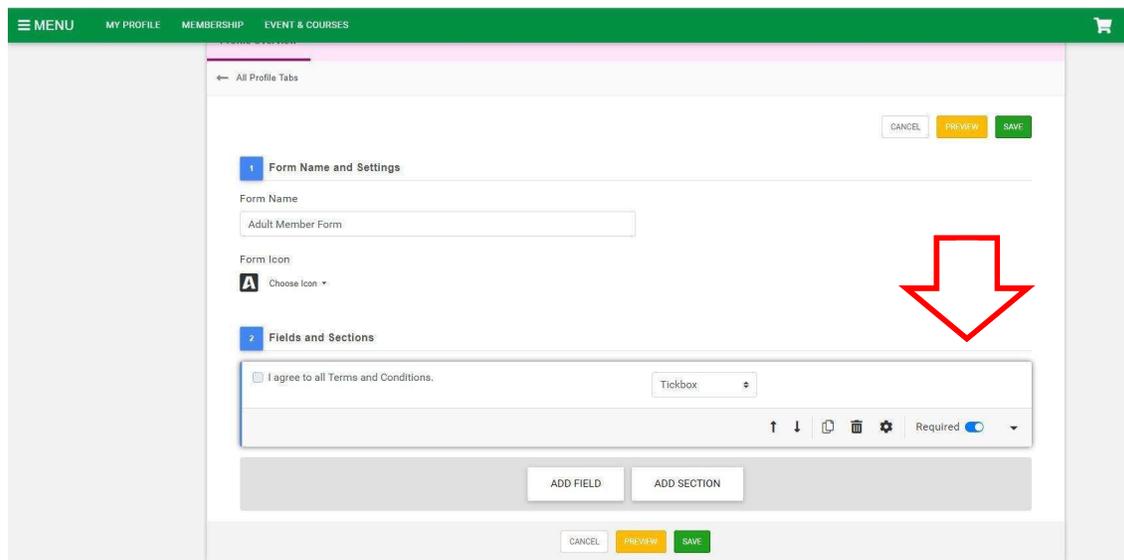
This is used to control View and Edit permissions of the field.



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.

The screenshot shows the 'Field Management' interface. Under the 'Fields and Sections' tab, a form field is displayed with the question 'What is your child's name?'. The field type is set to 'Short answer'. A red arrow points to the 'ADD SECTION' button located below the field. The interface includes a navigation menu at the top with 'MENU', 'MY PROFILE', 'MEMBERSHIP', and 'EVENT & COURSES'. The 'Profile Overview' section is active, and there are 'CANCEL', 'PREVIEW', and 'SAVE' buttons at the top right of the field management area.

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

The screenshot shows the 'Field Management' interface. Under the 'Fields and Sections' tab, a form field is displayed with the question 'What is your child's name?'. The field type is set to 'Short answer'. A red arrow points to the 'Heading text' input field within the section configuration area. The interface includes a navigation menu at the top with 'MENU', 'MY PROFILE', 'MEMBERSHIP', and 'EVENT & COURSES'. The 'Profile Overview' section is active, and there are 'CANCEL', 'PREVIEW', and 'SAVE' buttons at the top right of the field management area.

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?

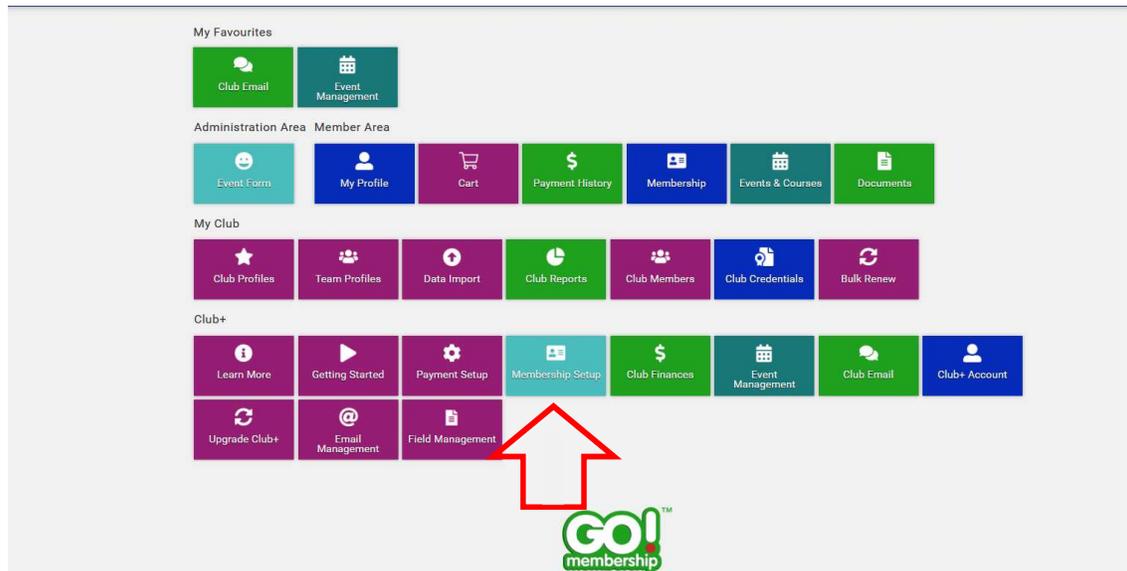
Yes, use the Preview button as indicated by the red arrow.

The screenshot shows the 'Field Management' interface. At the top, there is a navigation bar with 'MENU', 'MY PROFILE', 'MEMBERSHIP', and 'EVENT & COURSES'. Below this is a 'Profile Overview' section with a '← All Profile Tabs' link. 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 is a 'Form Name' field containing 'Adult Member Form' and a 'Form Icon' dropdown menu. In the 'Fields and Sections' section, there is a field for 'What is your child's name?' with a 'Short answer' dropdown and a 'Required' toggle. At the top right of the form configuration area, there are three buttons: 'CANCEL', 'PREVIEW', and 'SAVE'. A red arrow points to the 'PREVIEW' button. At the bottom of the form configuration area, there are two buttons: 'ADD FIELD' and 'ADD SECTION'. At the very bottom of the interface, there are three buttons: 'CANCEL', 'PREVIEW', and 'SAVE'.

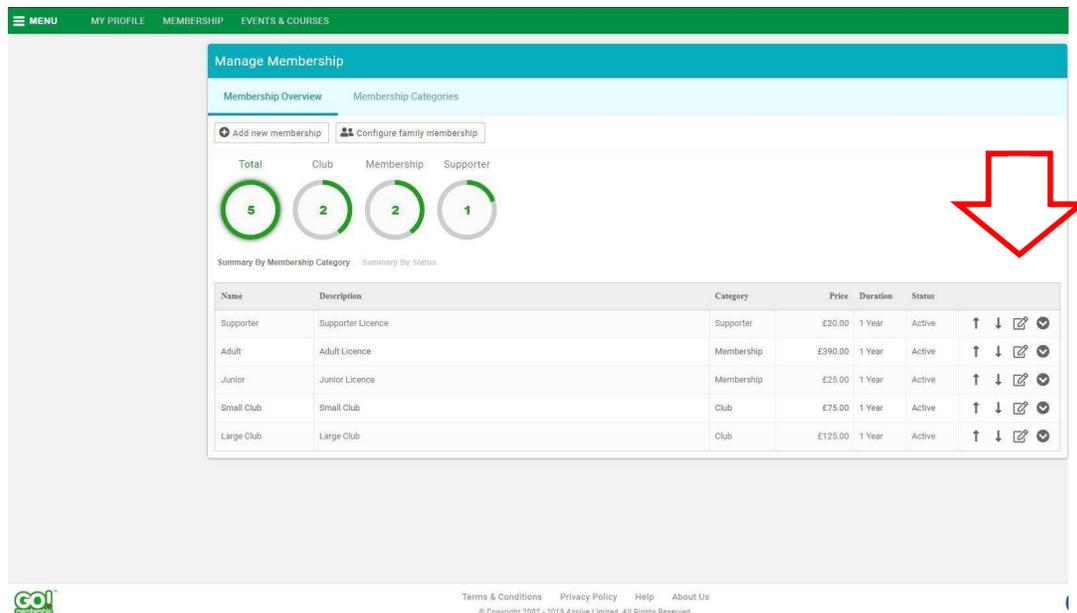
NOTE: It is always good practice to preview the form as once saved, it will immediately be available for members to view and fill in. Press Save to save changes or Cancel to discard changes.

Can I create a Form for a specific membership only?

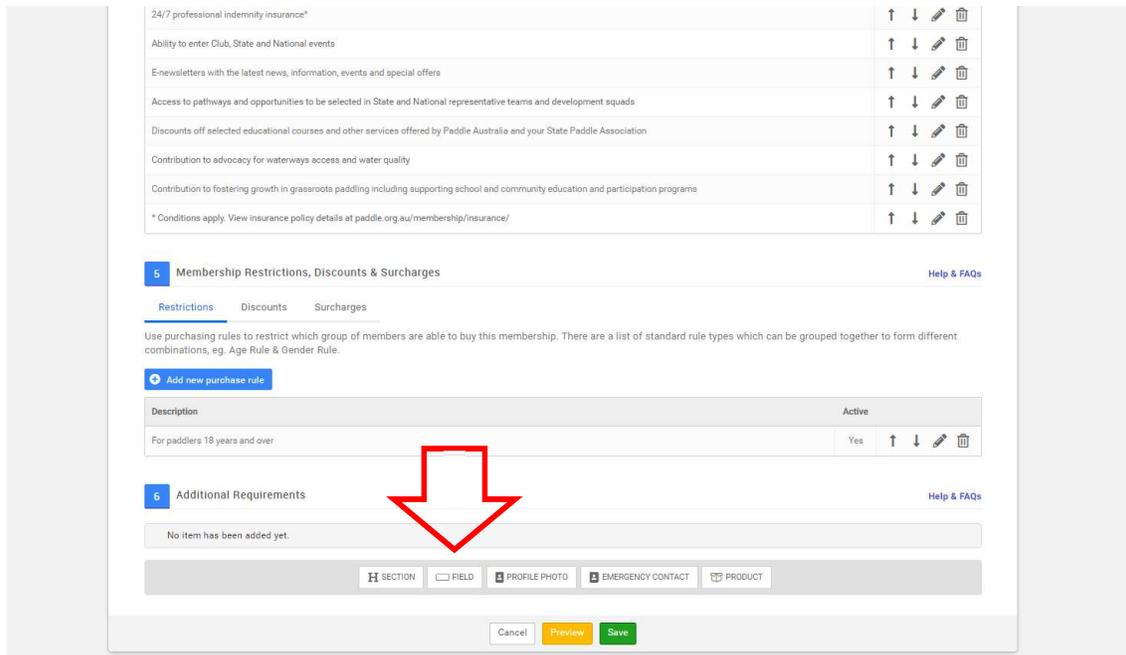
No, any Forms you create will be available to all members through the Member Details tab under My Profile. However you can make a Field (question) mandatory to members with a specific Membership type. To do so, go to the Membership Management tile via the homepage or menu.



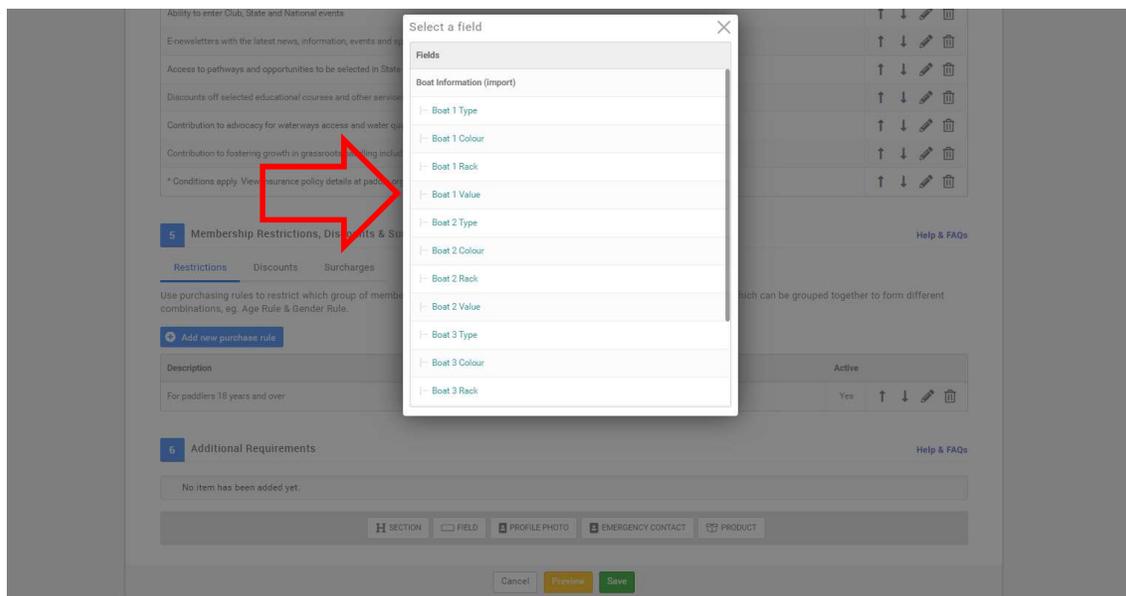
Click on the edit button next to the membership you created the field for.



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



Select the Field you want to import.



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

£390 Adult £125 Junior

Benefits

- Full liability insurance
- Legal support
- Competition licence
- Save 15% on gym membership nationwide
- All Leisure benefits
- Full liability insurance
- Legal support...

- Supporter card and pin badge
- Priority tickets to big events
- Access to online event application
- Magazine offers

SELECTED 1 Year Membership **More info**

Junior 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.

The screenshot shows the 'Additional Requirements' section of the membership journey. It features a 'Profile Photo' field with the instruction 'Please upload a photo'. A red arrow points to the field title, and another red arrow points to the 'Required' toggle at the bottom right of the field. The field is currently set to 'Required'.

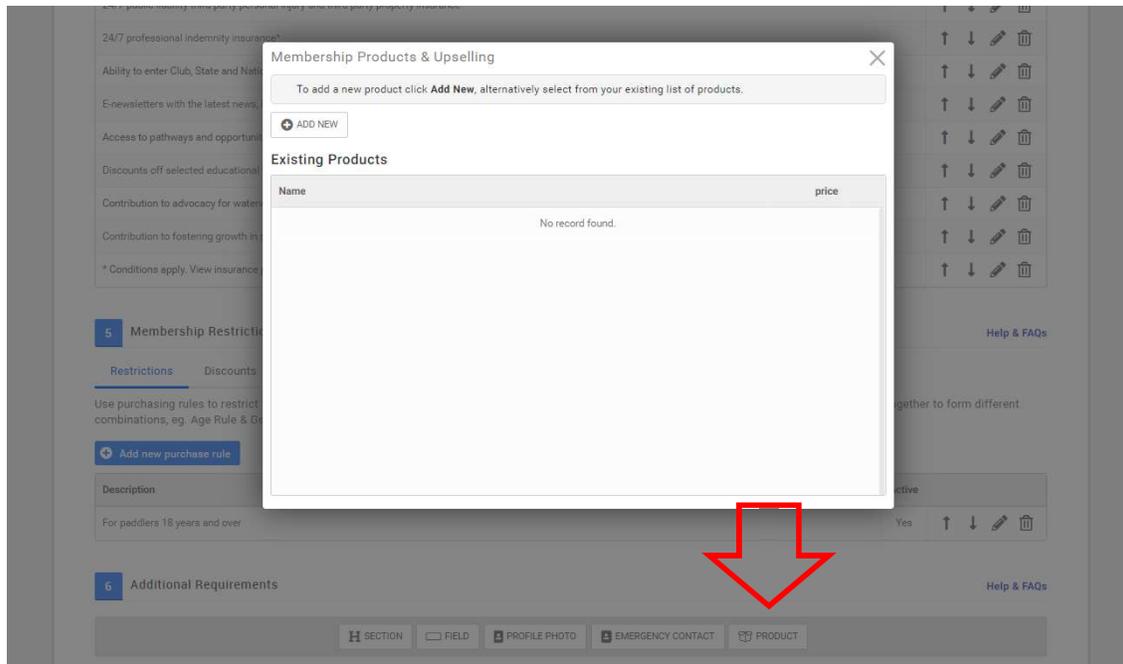
Emergency Contact

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.

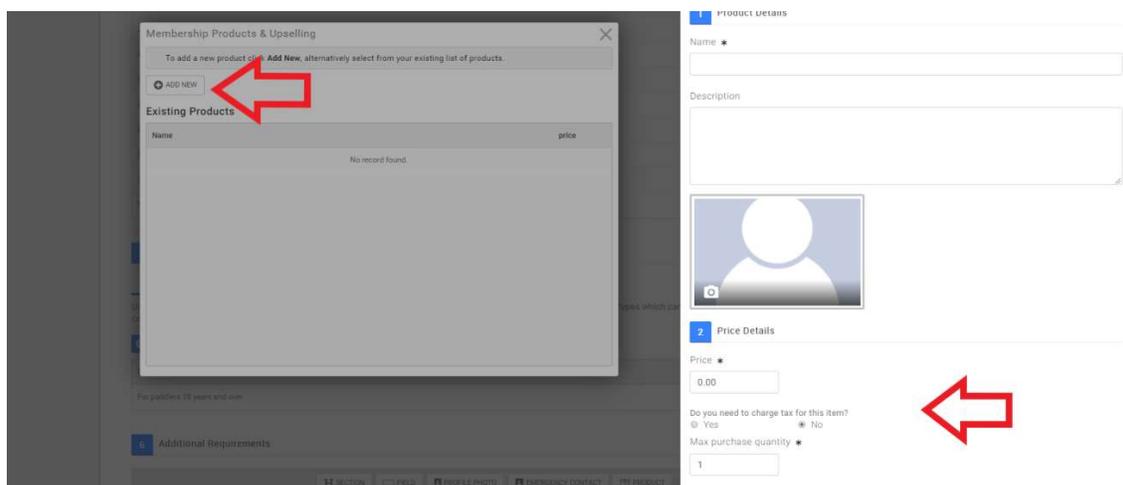
The screenshot shows the 'Emergency Contact' form within the 'Additional Requirements' section. The form includes fields for 'First name', 'Last name', 'Email address', 'Contact number', and 'Relationship'. A red arrow points to the 'Required' toggle at the bottom right of the form, which is currently set to 'Required'.

Product

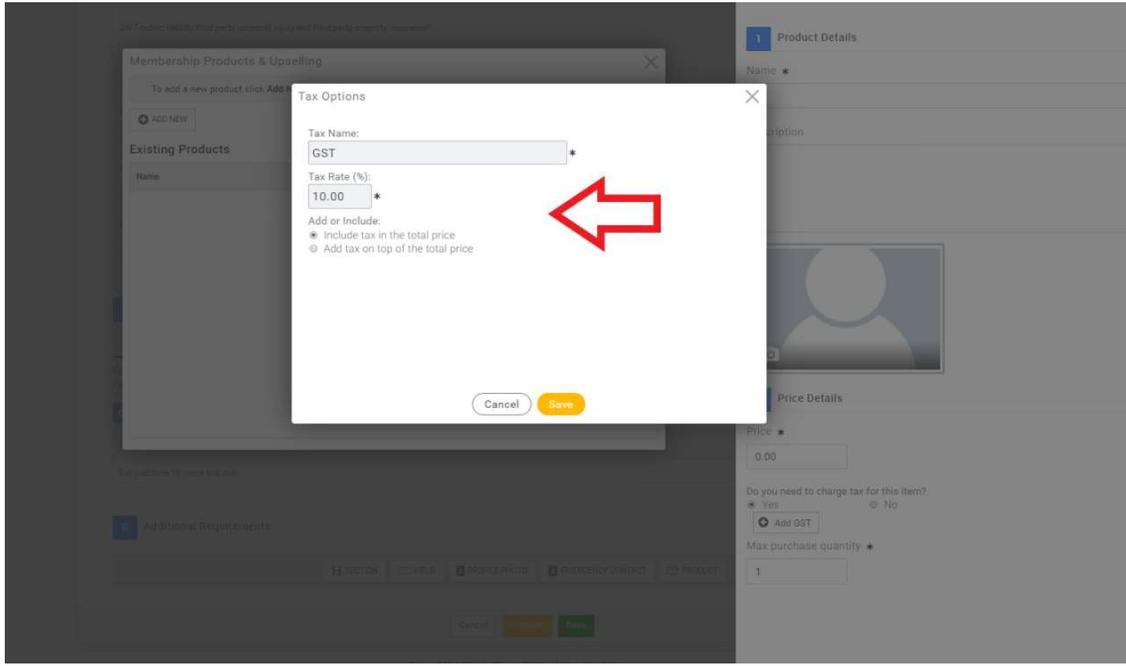
This field is used to offer other products in the membership journey as upsells, eg. merchandise, equipment, publications.



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.

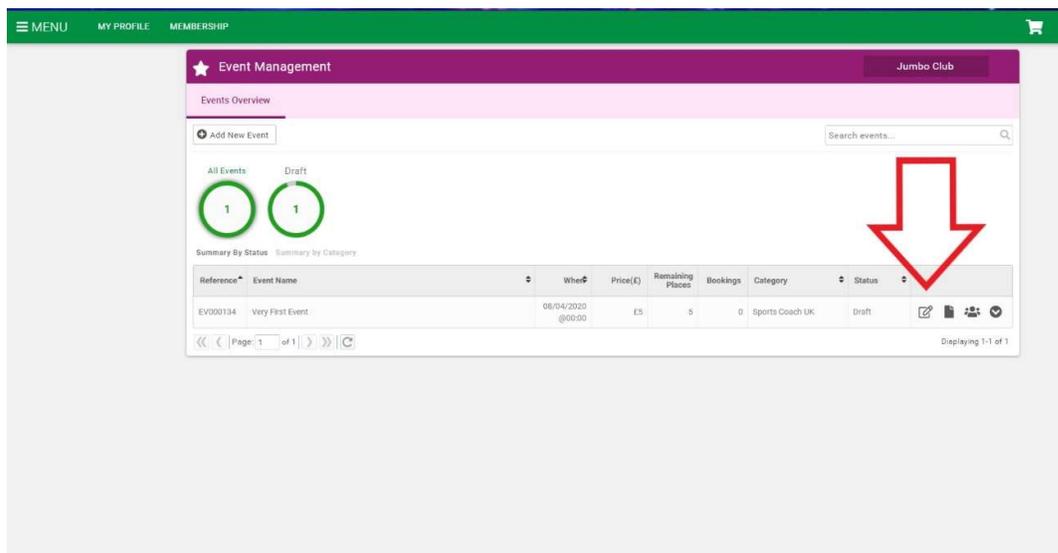


How do I add a Form to a ticket?

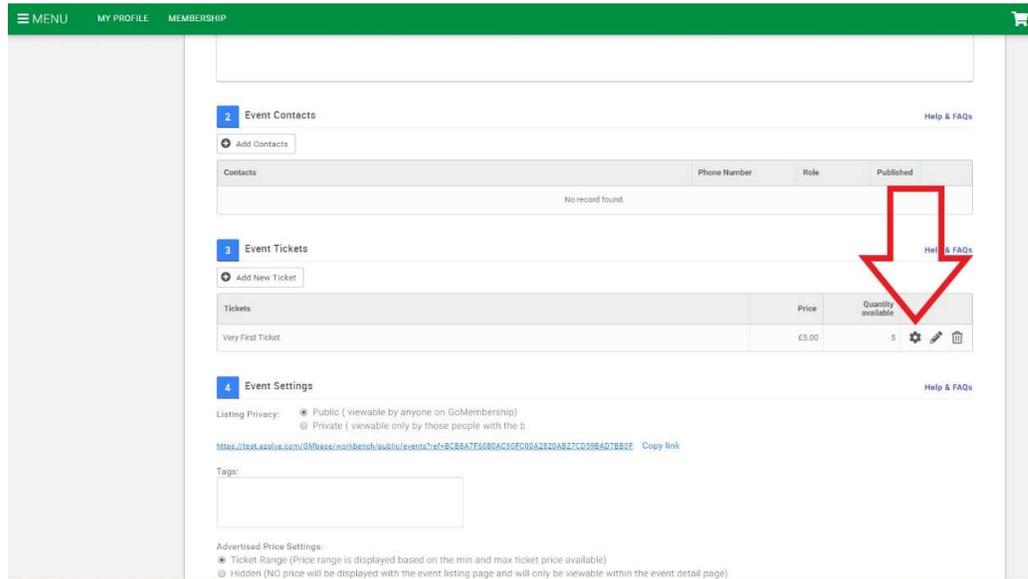
You can add a form created in Field Management to an event ticket through the Event Management tile.



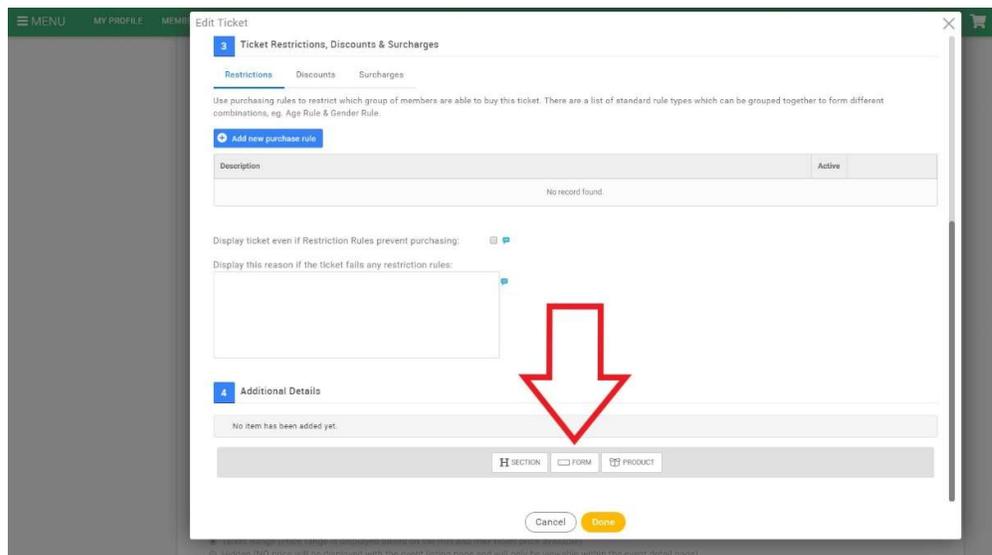
Click on the edit button next to the event you created the ticket form for.



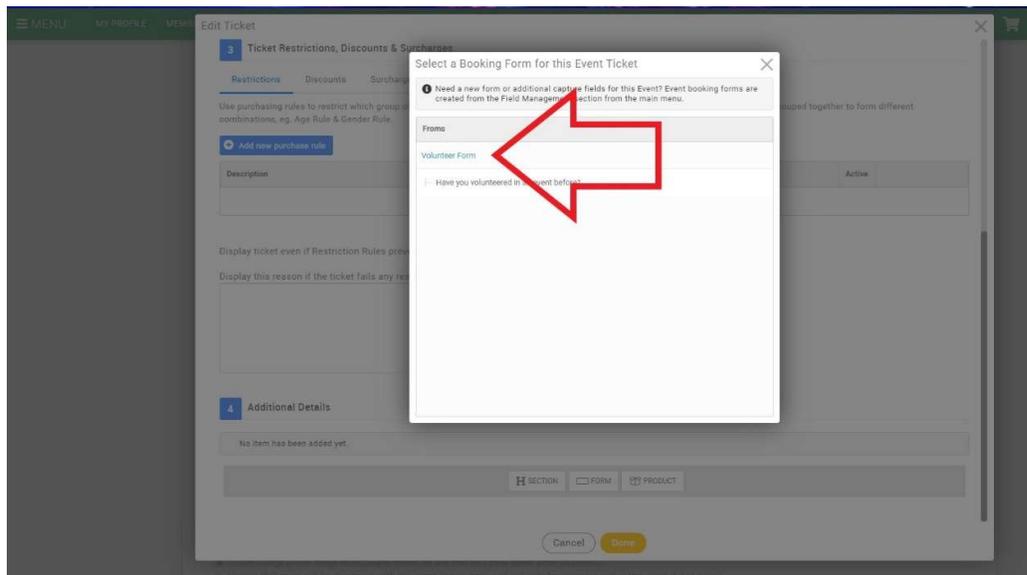
Scroll down to Section 3 and click on the Advance Setting button of the ticket.



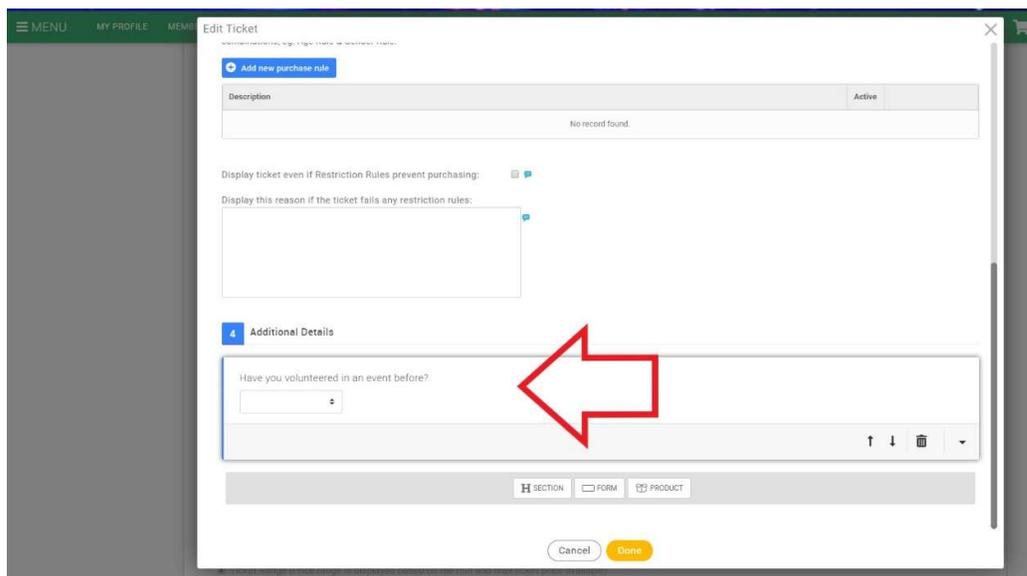
Scroll down to Section 4 and click on the Form button.



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.