

# How to Set Up and Manage FIELDS & FORMS



CANOE RACING  
NEW ZEALAND

This guide has been designed to assist you in the process for setting up **FIELDS & FORMS** on the CRNZ Club Membership & Paddler Portal.

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There is further information how to manage each of the following features and functions in the Club Administrator Support Guide or on the Support Page on CRNZ website.

If unsure, if you have any questions or if you require assistance, please contact us at [membership@crnz.org](mailto:membership@crnz.org)

## Fields Management & Forms

CRNZ Club Membership & Paddler Portal provides the functionality to ask questions and capture additional information and data from your members either as part of purchasing a membership, entering an event or simply as an extra form on their profile that they can complete at any time.

The first step is to create a 'Form'. Within this form you will create 'Fields'. These fields are the questions you will ask or the extra data you want from your members.

These 'Fields' can be added to specific memberships, specific events and products. This means that when someone selects to purchase that membership from your club, they will be asked to complete the fields prior to continuing with the purchase.

You can set these fields to mandatory or optional as you see fit. You can also set them so they are hidden from the member, can be seen but not edited by the member or so that they are both seen and can be edited by the member.

Different instances where you might use these settings is where you have Life Members and you want your members to see that they have been listed as a Life Member but not be able to change that themselves.

You might also have a requirement that all of your members complete a particular task or demonstrate a level of proficiency etc before they are accepted in particular events, in which case you might make fields that are hidden from their view, that will enable you to update their profile and even restrict their purchase to an event or membership based on the answer to this question (i.e. a Purchase Restriction rule that is "Member Field <200m swim> is equal to <yes>" this means that any member with a "no" in this area can neither see nor purchase that membership).

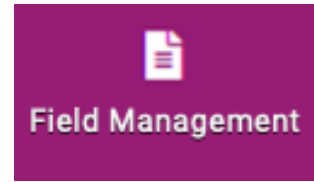
While there is no limit to the number of forms nor fields (questions) that you can set up for your Club, it is always a good idea to be mindful of the end user experience; what it will be like for your members when they click in their profile or when they complete their Membership Purchase.

If you have club Terms and Conditions that members need to agree to at the time they purchase their membership, you can utilise this functionality to create these and have a mandatory tickbox they must check tick to be able to progress with purchasing the membership. While there is no limit to the number of forms nor fields (questions) that you can set up for your club, it is always a good idea to be mindful of the end user experience; what it will be like for your members when they click in their profile or when they complete their membership purchase.

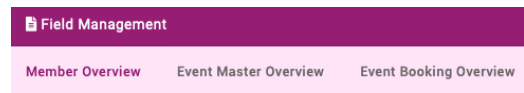
If your club has the pro version clubs can add fields and forms into the membership journey. If your club has the essential package, clubs will only be able add the fields and forms into the member profile section

# MEMBERSHIP JOURNEY VS EVENT TICKET JOURNEY

It is important to ensure you set your forms up in the correct area based on where you want these fields to be used. For all forms/fields that you want on the member profile and available for selection as part of the Membership purchase Journey, ensure that you select the **Member Overview** area of field management to create/edit your forms.



If you want your forms to be available to add onto the event ticket purchase journey, ensure that you create/edit your forms under the **Event Booking Overview** area of field management.

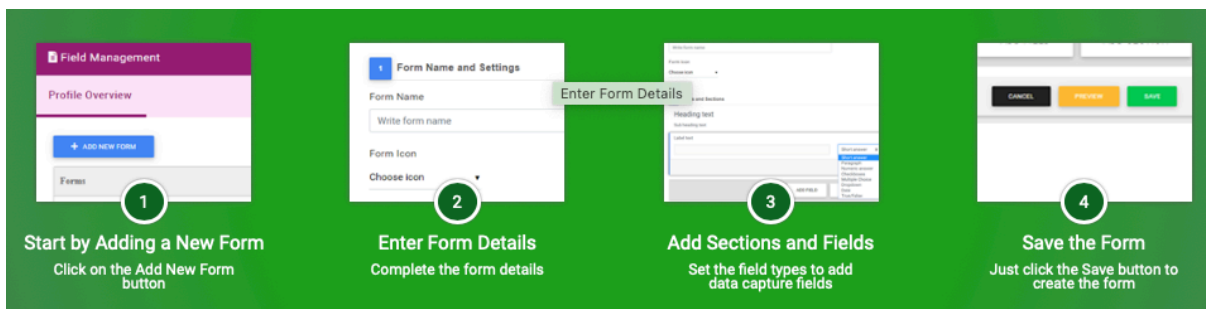


**Event Master Overview** is for forms that are that will show up in the event.

## SET UP

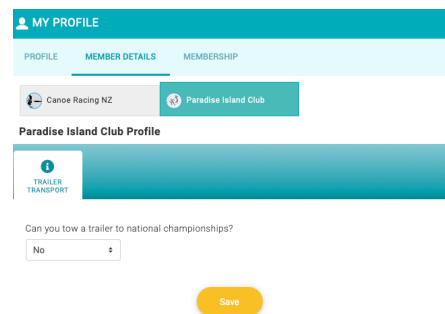
From the menu, locate and click on the 'Field Management Club' Tile.

The first thing is to select 'Add New Form' from the top left of the screen.



For Member Overview forms - You will then need to give your form a name. This form will appear on the member profile when they click on 'Member Details' from within the 'My Profile' are so keep this in mind when considering the naming.

For each club/organisation that an individual is a part of, they will see all forms that have been set up by them on their personal profile. As noted above, to access these forms, they will click on 'Member Details' within their 'Member Profile'. They simply click on the club name to see the forms they have. If you choose not to add the fields to the membership purchase journey, this is the only area that the forms and their fields will appear.



Add fields to your form. This is the data you are wanting to collect from members or enter into their profile for the clubs information. Click on 'Add Field'. You will see that 'Label Text' is already highlighted. This is the question field. The answer type will also be pre-set to 'Short Answer'. It is important not to type your question/field in until you have selected your answer type as changing the answer type will result in the removal of any text in this area.

There are nine (9) possible answer types:

#### Short Answer

- This is a free text field that allows the member to enter anything they like in a small space.

#### Paragraph

- This is the same as the short answer however it provides larger area for longer answers.

#### Numeric Answer

- This provides the member with a field that they can only answer numbers into.

#### Checkboxes

- Your club defines the answers available and the member chooses as many as they want.

#### Multiple Choice

- Your club defines the answers available and the member can choose only one of these.

#### Dropdown

- Similar to the multiple choice in that the club defines the available answers however the member will select their choice from a dropdown box (max 1 answer per dropdown).

#### Date

- Presents the user with a date picker tool (calendar). Only a date can be entered in here.

#### Tickbox

- This is a single tickbox that is presented to the member. Ideal for Terms and Conditions (i.e. I have read and agree to the club Terms of Membership as provided for on the club website).

#### Yes/No

- This is the same as the dropdown, however it is prepopulated with Yes and No.

All answer types provide you with the ability to enter information into a 'Tool Tips' space. This information will appear when a member clicks on the small speech bubble next to the field.

Label text

Option 1

Add option

All answer types provide you with the ability to enter information into a 'Tool Tips' space. This information will appear when a member clicks on the small speech bubble next to the field.

Required

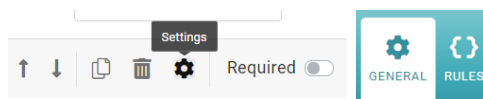
To add available answers on the questions types that allow it, click on 'Add Option' and type in the answer. Continue this until you have entered all answers to be made available on that particular field. To make a field mandatory as part of the form, click on the toggle switch to the right of 'Required'.

An unique identifier of this form item which will be used in report output. Max character length 50.

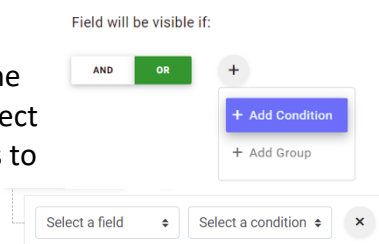
# CONDITIONAL LOGIC

Conditional logic is the ability to set conditions on the fields so that they only appear if the answer to a previous question meets a condition i.e. If member answers YES to “do you have a medical condition” then SHOW “please provide details”. This way only fields that are relevant will be displayed. You can add conditional logic to existing forms and fields as well as new ones.

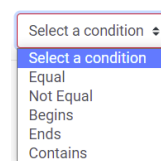
Click on the Settings Cog for any field and a side panel will open up. Click on the “Rules” tab.



To enable the selection of fields for the logic, you will have to save the form if you have added any new fields. Only after saving will the fields be available in the logic area. Click on the “+” button and select + Add Condition. You will then see a select a field box. Click on this to see questions in your form. Select the relevant question.



The options that you see will depend on the question type for the field you have selected. If it a multi selection, you will be able to select from; Equal, Not Equal, Begins, Ends, Contains. In the next field you will be able to select from the answers that you have available for that question.

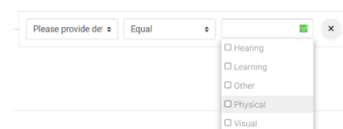


Make you selection and click DONE at the top right of the panel to save this condition.

When you have conditions on a field, a small icon will appear in the upper right corner of that field on the form.



If you have conditional logic set up on fields that you want to use in the membership journey, you will need to ensure that you add all of the possible fields that will need to be answered as part of the journey.



You can also set “Tool Tip” and “Watermark Text” on your fields. Tool Tip is what will appear if a member clicks the little blue speech bubble. This should be used to provide them with information on what this field is, is used for or where they can find the information they need to complete the field. Watermark Text is for fields that are free text and is used as a form of prompt for example in a Medical Conditions field that is free text, you might enter “Diabetes, Epilepsy, Sickle cell disease, Asthma etc.” so that members know to type what they have in this area.

**PRE-SET “ADDITIONAL REQUIREMENTS”:** There are some Additional Requirements that are already being pushed down to members as part of the Journey. To view these visit the membership profile in Membership Management.

The fields collected are; Paddling Disciplines, Activities and Interests, Member Information, Coaching Information, Officiating and Volunteering Information, Para Canoe and Emergency Contact. There is a Declaration for members to agree to.

# DISPLAY

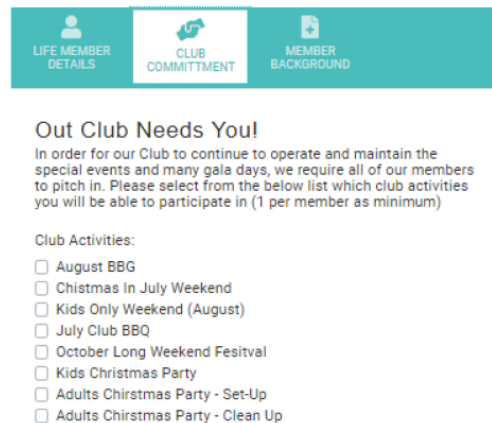
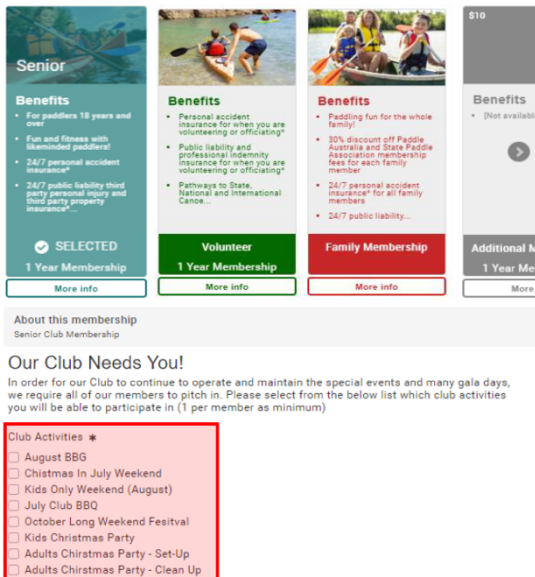
To understand the display of the forms and fields you have set up, below is an image showing what the Clubs forms look like when a member is in their profile, under “Member Details”.

Where you do not elect to have the fields as part of the Membership Purchase Journey (Pro version Only), the image below on the left is the only place that the Forms will appear.

Members will need to be directed to this area to complete the fields.

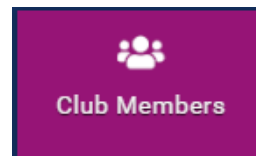
Where you have selected certain fields to form part of the Membership Purchase Journey by adding them into the Additional Requirements as part of the Membership Setup process, they will appear as shown in the image below to the right, after the member selects the particular membership with those fields attached.

Contact membership@crnz.org for information on how to add fields to the Membership Purchase Journey.



## VIEWING/UPDATING FIELDS

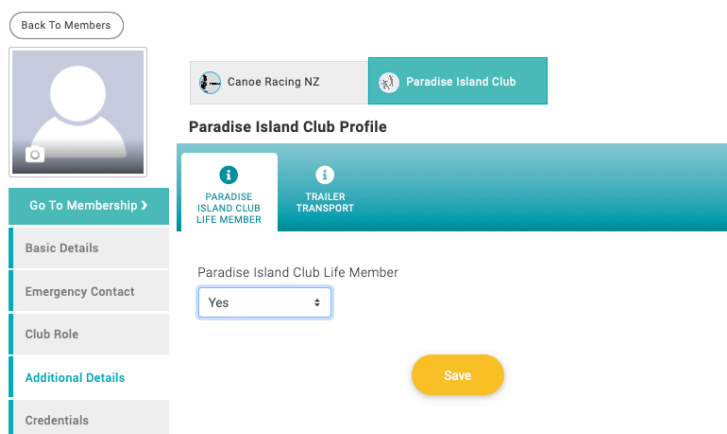
To view and/or update the fields on any of your members pro- files, from the menu, locate and click on the 'Club Members' Tile. When the page loads you will be presented with all of your club members. You can click on any of the infographic circles to filter your members or use the search function.



When you have located the Member you are after, click on their tile.

From the tabs on the left-hand side, select 'More About Me' then select your club from the tiles at the top of the new page.

You will then see all forms that you have setup at your club. Click on the relevant form to view the details.

A screenshot of a web interface for updating a member's profile. At the top left is a "Back To Members" button. Below it is a placeholder profile picture. To the right are two club selection tiles: "Canoe Racing NZ" and "Paradise Island Club". The "Paradise Island Club" tile is selected. Below the club tiles is the heading "Paradise Island Club Profile". On the left is a vertical menu with options: "Go To Membership >", "Basic Details", "Emergency Contact", "Club Role", "Additional Details" (highlighted in blue), and "Credentials". The main content area shows two tabs: "PARADISE ISLAND CLUB LIFE MEMBER" (selected) and "TRAILER TRANSPORT". Below the tabs, the text "Paradise Island Club Life Member" is followed by a dropdown menu currently showing "Yes". A yellow "Save" button is located at the bottom right of the form.

From here you can edit any of the fields that you have set up. You cannot change the settings of the fields though. For example, if you wanted to make the Life Member field hidden to members, you would need to go back through the steps outlined in the above setup to view the form and edit the settings.

Be sure to click 'Save' when you have finished making your change

# EVENT FORMS

Fields and forms can be added to the Event Registration Journey in the same way they are added for the membership profile.

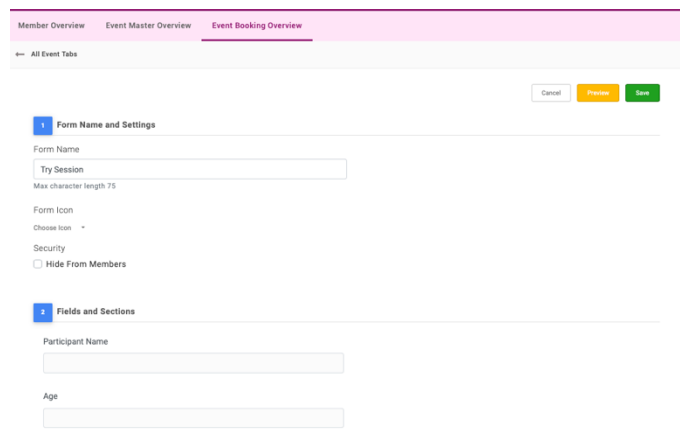
If you have the event as an Open event - Any person can register for that event (not just club members). This means you will most likely need to collect additional information about the participants.

If you want to collect additional information about the participant such as medical, disability, consent information etc you will need to add it to the forms.

Create a form and add fields that you want to ask and save the form.

You can add the form in two places in the event.

- 1) To the event set up – This information will be for the person who is adding the event (ie an event manager)
- 2) To the event ticket – Event Participants will have to complete the fields when they add the ticket.



Below is an example of a form that is attached to the event ticket.

Participant Name \*

Age \*

Gender \*

School

Participants must be able to swim 50m wearing a Personal Floatation Device (PFD), have a moderate level of water confidence and be able to understand and follow instructions of the coaches. \*

No

Do you have any known medical conditions, disability/impairment and / or take any medications we should know of? (This may include physical, intellectual, learning, vision, and hearing impairments/disabilities) \*

In order for us to make your experience the best it can be, please let us know below if there is any additional assistance that may be required (e.g. a support person, adaptive equipment, assisted devices, sighted guide, etc) or if there is anything else that might assist us to support you/your child to have a more positive paddling