Club Data Capture

User Guide

Club Data Capture

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Club Data Capture

Club data capture gives you the ability to ask any question in a range of different formats through a number of different methods. Data capture fields and forms can be added to the member profile, membership purchase journey, and ticket purchase journey.

Accessing

You can access by selecting Menu, on the top left on your screen, followed by Field Management Club
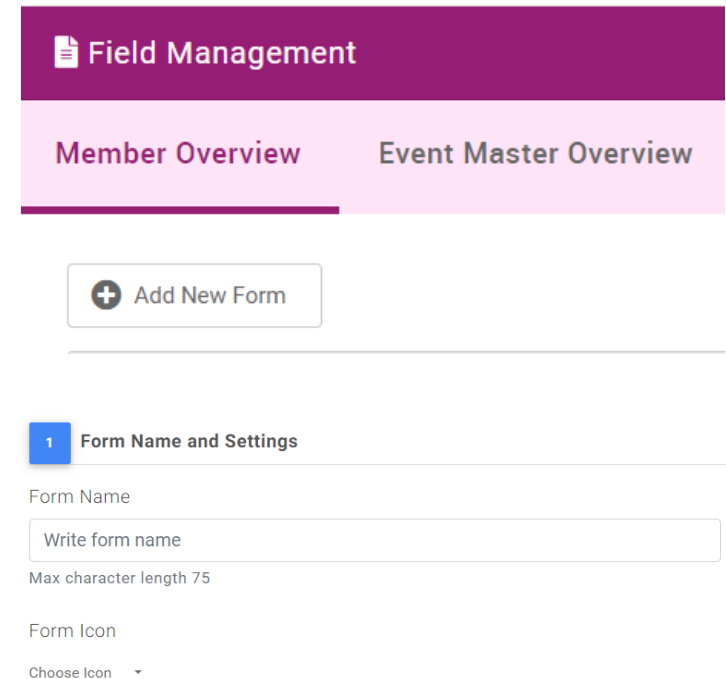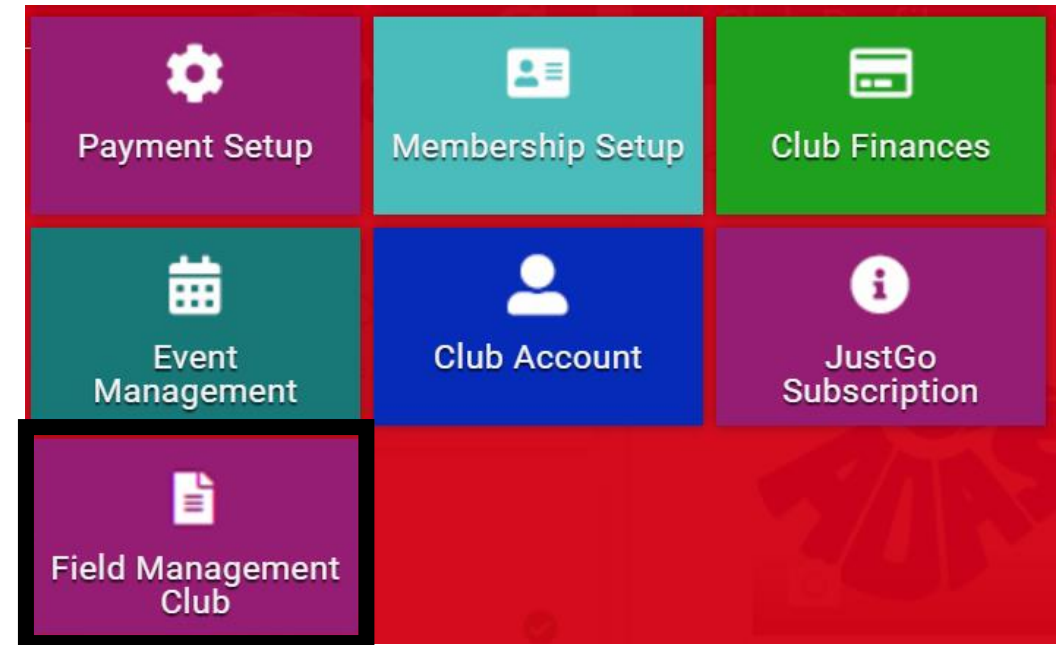
Overviews

Member Overview allows you to create forms and fields within the member profile. These can also be used in the sign-up and membership purchase journeys.

Event Booking Overview allows you to create forms containing fields that can be attached to an event ticket and completed during the ticket purchase journey.

Forms

Forms can be made up of multiple fields and are the method of grouping information together. For example, competition experience or personal information.

Simply click Add New Form and select a name and icon to identify the form

Fields

Fields are what make up each form and provide the basis of the data capture. For example, if you want to know about volunteering interest, simply add a new field.

Click on 'Add Field' and enter your question. You can select which field type from the dropdown.

Field Types

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

Paragraph is used for longer answers and can accept up to 5000 alphabetical and/or numeric characters.

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

Short answer

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

Paragraph

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Field Types

Numeric answer is used for numeric answers only.

Checkboxes are used to allow multiple pre-selected answers. Add in each possible answer.

Multiple Choice is used to allow one of multiple preselected answers

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

Numeric answer

Please do not use this option to collect phone numbers. Use the 'Short answer' option if you wish to collect any kind of phone numbers

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

Checkboxes

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

Multiple Choice

SWIM WALES
NOFIO CYMRU

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Field Types

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

Date is used for an exact date.

Tick box is a single predetermined sentence which can be ticked.

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

Dropdown ⇕

Required ○

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

Date ⇕

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

Tickbox ⇕

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↑ ↓ ⎘ 🗑 ⚙ Required ⚫ ▾

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Date

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Tickbox

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Field Types

Yes/No Boolean and Non Boolean is used for either a Yes or No answer.

The deference between Boolean and Non Boolean, would be the pre-set answer. You can select a blank answer as a default for Non Boolean, whereas on Boolean you will have to select Yes/No as a default answer.

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

Yes/No - Boolean

An unique identifier of this form item which will be used in report output. Max character length 50.
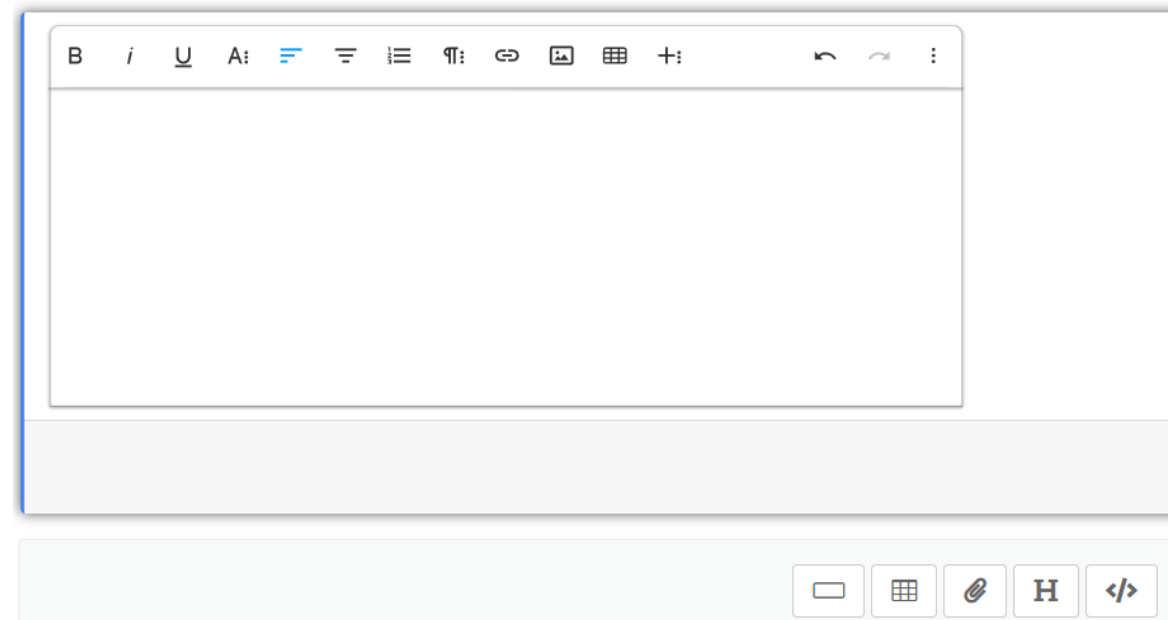
Yes/No - Non Boolean

Content Block

Attachment field allows members to upload documents to any forms.

This can be utilized to collect essential documents from members such as for credentials.

Note, further configuration such as upload limited to only Images, number of attachments can also be found on its advance settings.

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Change the sequence

There are sequence icons (up and down), alongside the duplicate, delete and settings icons that all pop up with the field type when you select 'Add Field'

Change the sequence

Click on the Settings icon to discover the general properties. Each field has unique general properties

Tooltips provide the user with a short instruction on what the field is about.

Decimal Precision, available for Numeric fields, allows you to set the number of decimal places required in the answer.

Default Value, available in Dropdown fields, allows you to set which answer will be displayed as default.

Change the sequence

Watermark Text provides a short description inside the field to help the user determine how to respond. Eg, Enter text here.

Field Security determines whether a field will be visible and/or editable by members and/or club administrators.

Equality Anonymised is used for equality questions, this hides the question's answers from the Administrators view. only through standard equality reports admins can get the general number of people who have answered to the question.

Rules

Rules allows you tailor Field to show on your desired member response.

The additional box left to the Fields name is use to define a unique name to easily locate the field in the report view.
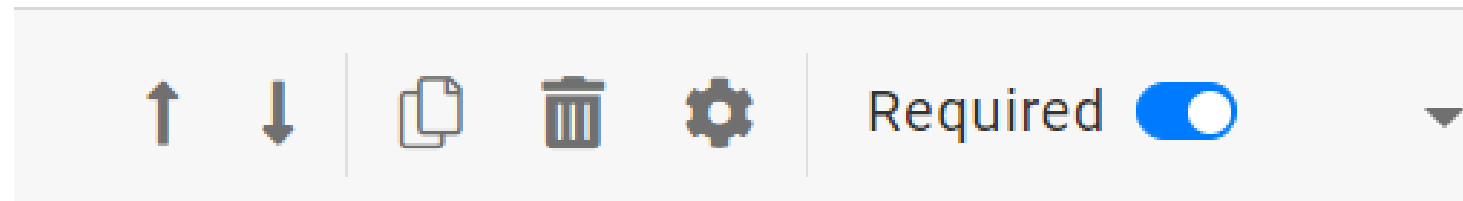
Mandatory Fields

You can make fields mandatory by using the Required toggle indicated.

Once activated it turns blue and completion of that field / question will be mandatory.

If a field has the required toggled on, it will be mandatory for all members

Adding Fields

Fields can be added to specific membership types through the Membership Setup feature.

You can apply individual fields to individual membership types so you do not have to have all the same fields under every membership.