



Field Management

User Guide for JustGo

Important note for NNAS Providers and their staff:

- Where JustGo says “**Club**”, think “**Provider organisation**”
- Where JustGo says “**Member**”, think “**Candidate**” – this can be your Course Directors, Admin staff, or the candidates on your courses.



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What is Field Management?



Field Management provides administrators with the ability to enhance their data capture from candidates.

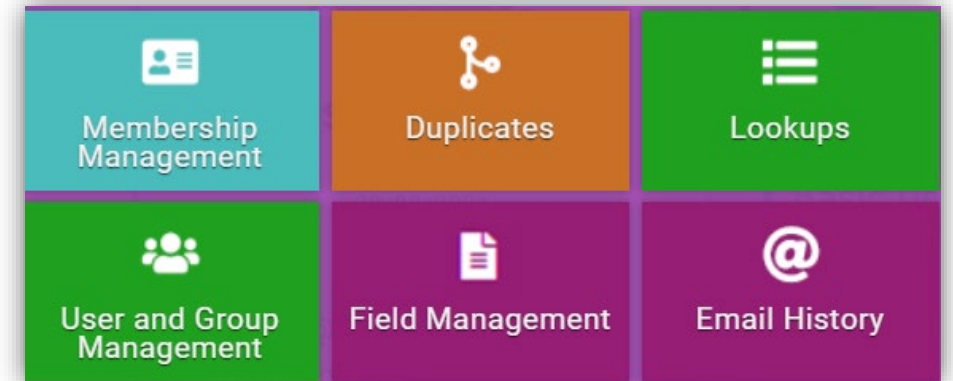
It provides the ability to ask any question in a range of different formats through a number of different methods.

Data capture fields and forms can be added to the candidate ticket purchase journey so that Providers can ask relevant questions when a candidate books on a course.

Some screenshots and info in this guide may differ depending on subscription type.

How do I access Field Management?

You will find the Field Management tile within the Administration or JustGo Lite/Essential/Pro area of the Menu.



What are the different 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 (*this overview is not currently in use for NNAS so do not add any forms under this overview*).

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. This is useful if a Provider wishes to ask particular questions of a candidate when they book a place on a course, e.g. previous experience etc.

What are Forms?

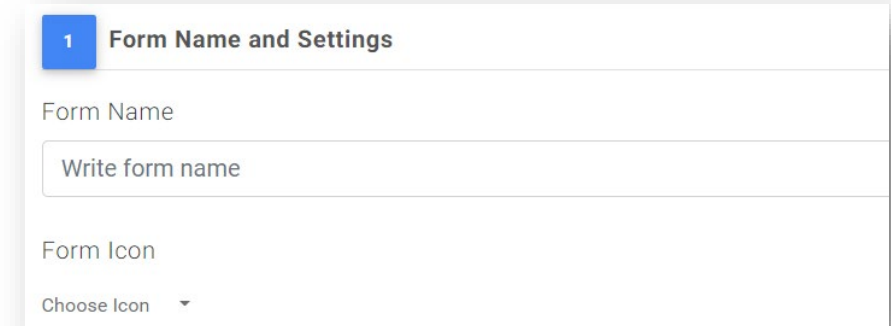
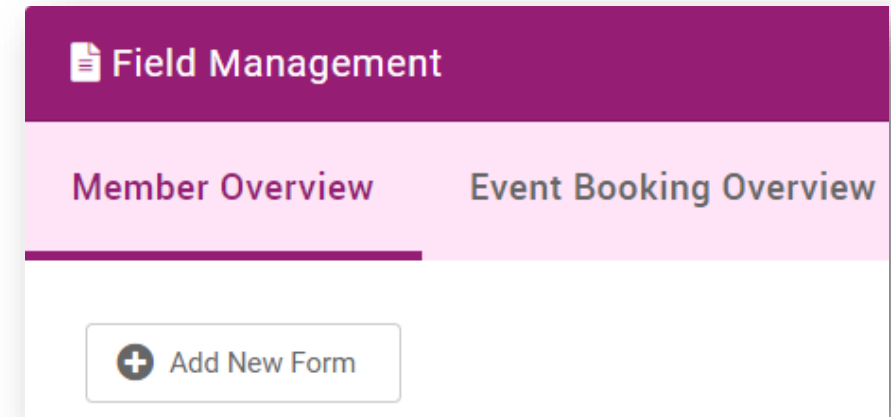
Forms can be made up of multiple fields and are the method of grouping information together.

For example, previous experience or personal information.

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

Note: If you create the form in the Member Overview (please don't!), it will show in the Member Details tab of every member profile unless you hide the form using the form settings.

Forms are created the same in every overview.



What are Sections?

Sections are used primarily to separate fields / questions into different sections within the form.

Sections consist of two parts, the heading and the sub-heading, use a Sub-heading to provide additional information.

This is a section

This section breaks up my form to provide an easy to understand structure

What are Fields?

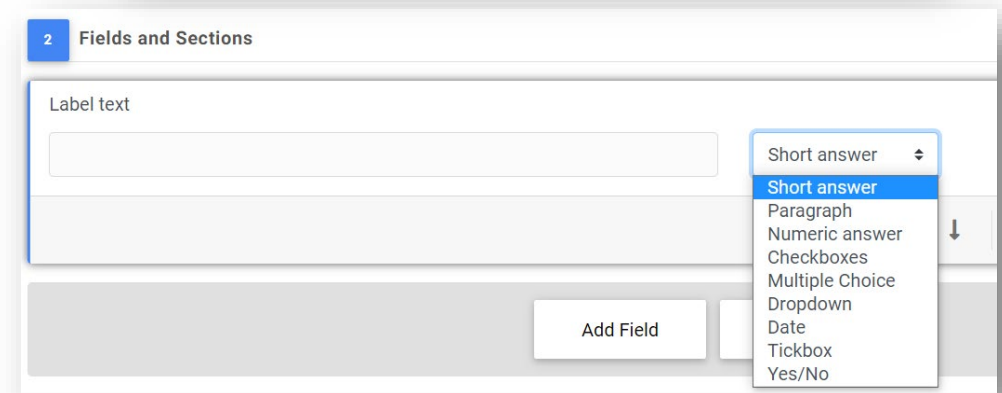
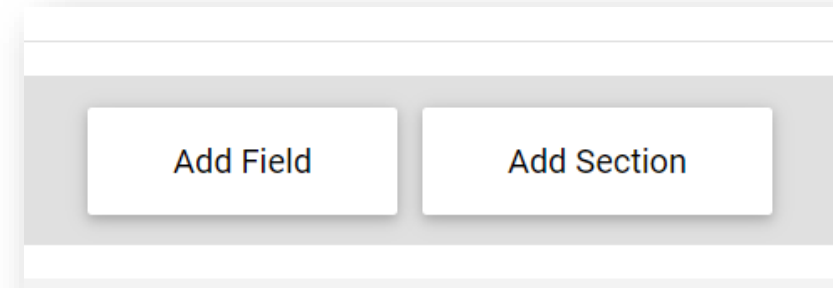
Fields are what make up each form and provide the basis of the data capture. A field is where a candidate will provide the information required.

For example, if you want to know about allergies, simply add a new field to ask the question.

Click on 'Add Field' and enter your question.

You can select which field type from the dropdown.

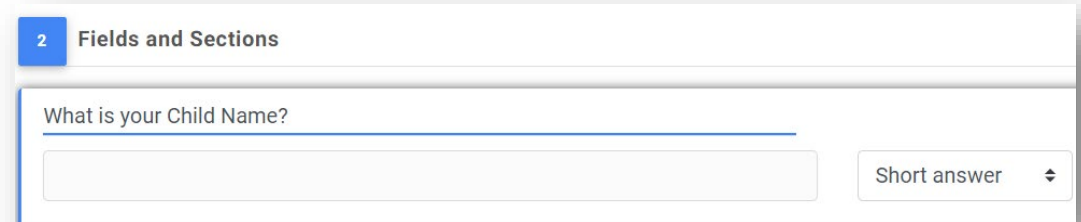
Note: There is a full description of each Field Type in the next section.



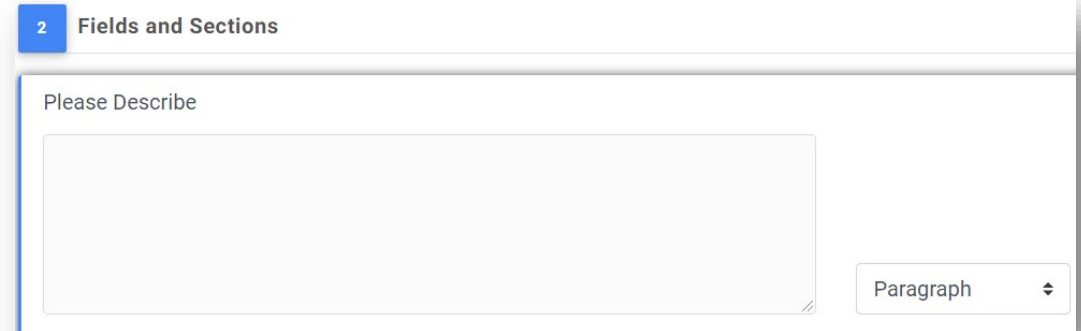
What are the Field types?

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.



The screenshot shows a configuration window titled "2 Fields and Sections". It contains a text input field with the label "What is your Child Name?". To the right of the input field is a dropdown menu currently set to "Short answer".

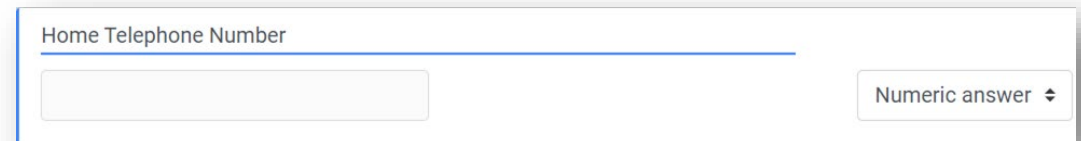


The screenshot shows a configuration window titled "2 Fields and Sections". It contains a large text area with the label "Please Describe". To the right of the text area is a dropdown menu currently set to "Paragraph".

Continued on the next page...

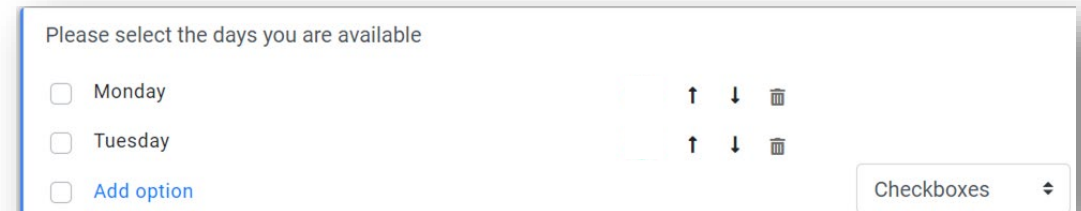
What are the Field types?

Numeric answer is used for numeric answers only.



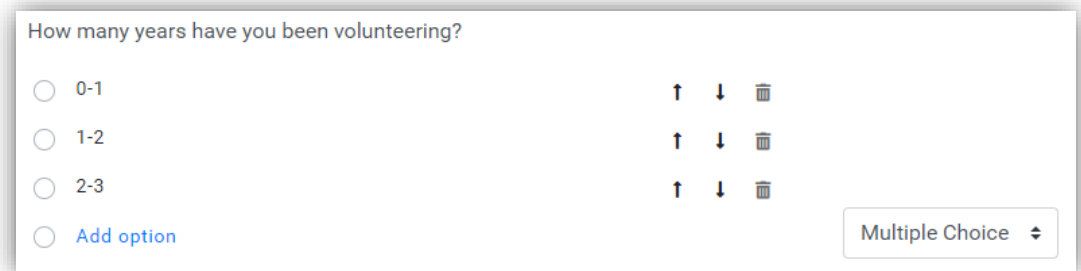
A screenshot of a form field titled "Home Telephone Number". It features a text input box and a dropdown menu on the right labeled "Numeric answer" with a downward arrow.

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



A screenshot of a form field titled "Please select the days you are available". It contains three checkboxes: "Monday", "Tuesday", and "Add option". To the right of the checkboxes are three columns of icons: an up arrow, a down arrow, and a trash can icon. A dropdown menu on the right is labeled "Checkboxes" with a downward arrow.

Multiple Choice is used to allow one of multiple pre-selected answers.



A screenshot of a form field titled "How many years have you been volunteering?". It contains three radio buttons: "0-1", "1-2", and "2-3", followed by an "Add option" link. To the right of the radio buttons are three columns of icons: an up arrow, a down arrow, and a trash can icon. A dropdown menu on the right is labeled "Multiple Choice" with a downward arrow.

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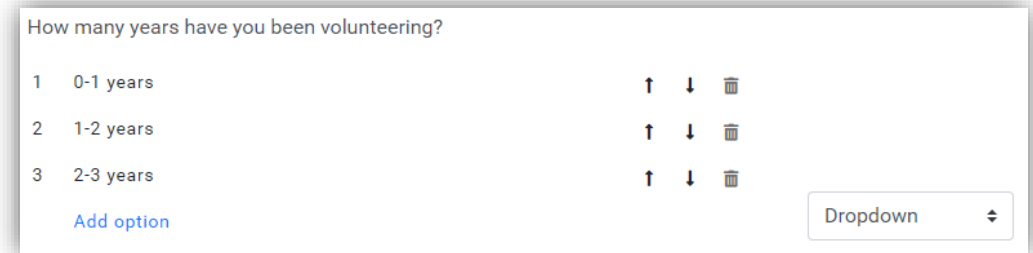
What are the Field types?

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. For example, it could be used for agreeing to the terms and conditions.

Yes/No is used for either a Yes or No answer to a specific question. With Boolean you can have a pre-selected answer set while Non-Boolean starts as blank

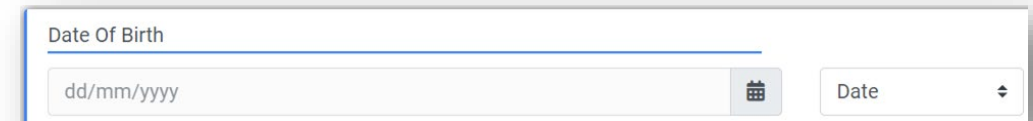


How many years have you been volunteering?

1	0-1 years	↑	↓	🗑️
2	1-2 years	↑	↓	🗑️
3	2-3 years	↑	↓	🗑️

[Add option](#)

Dropdown ▾



Date Of Birth

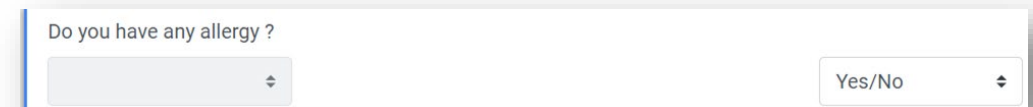
dd/mm/yyyy 📅

Date ▾



I agree to all terms and conditions

Tickbox ▾



Do you have any allergy ?

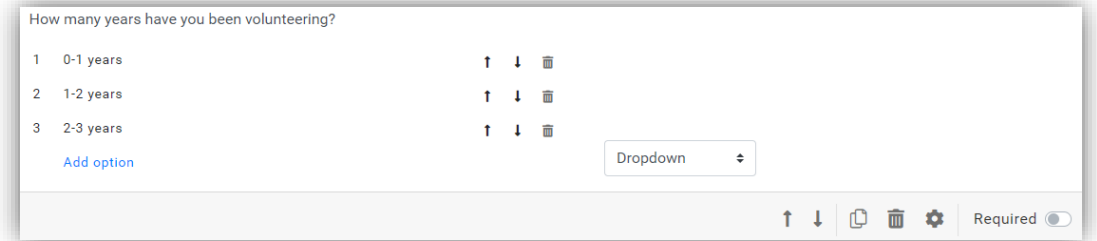
▾

Yes/No ▾

Can I change the sequence or delete Fields?

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'.

Note: If you wish to delete a field that has already been completed by any user, you will need to re-link the data to an appropriate field or you will lose the data.



What other settings are available?



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

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.

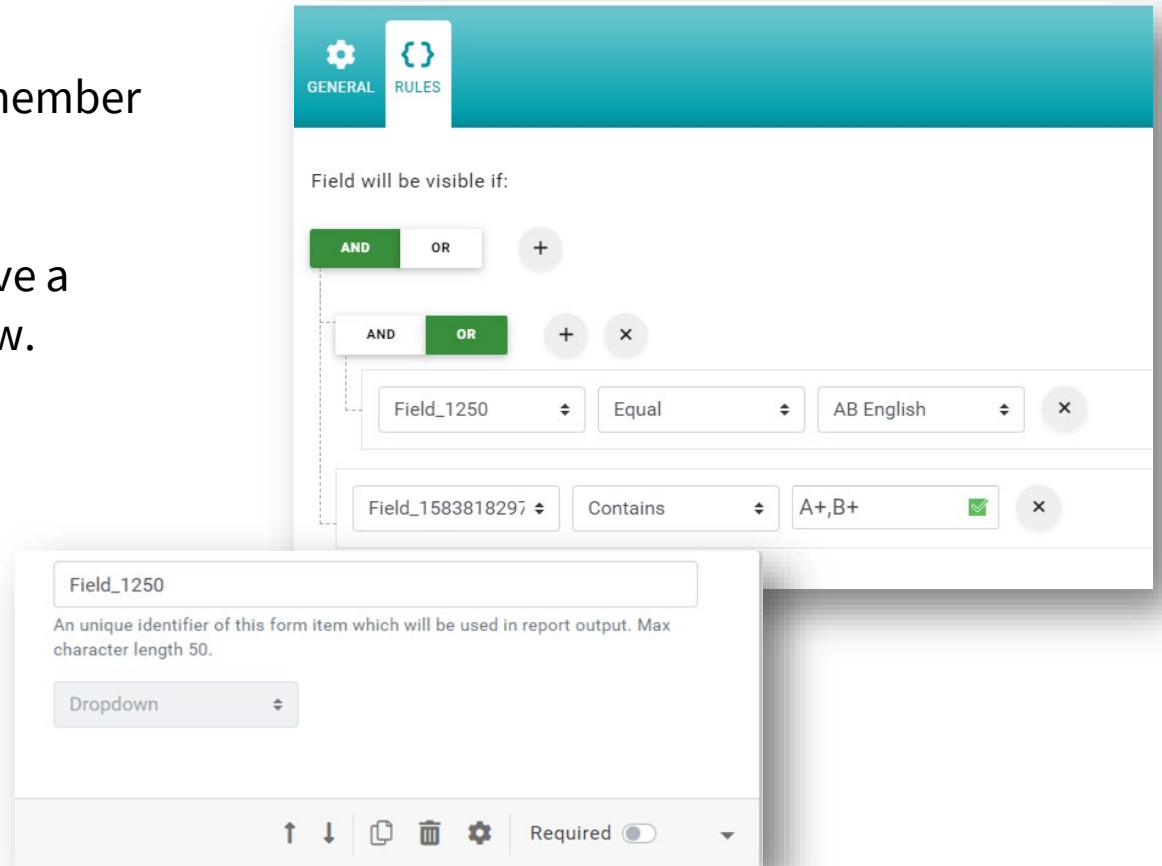
Watermark Text provides a short description inside the field to help the user determine how to respond. Eg, Enter text here.

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

What other settings are available?

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

The additional box left to the Fields name is used to give a unique name to easily locate the field in the report view.



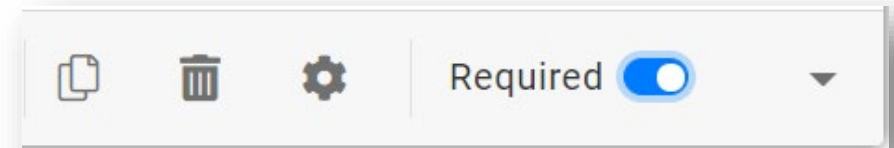
The screenshot displays the 'RULES' configuration page for a field. The page has a teal header with 'GENERAL' and 'RULES' tabs. Below the header, it states 'Field will be visible if:' followed by a logical operator selector with 'AND' selected and 'OR' as an alternative. A plus sign is used to add conditions. The first condition is 'Field_1250' (selected from a dropdown) 'Equal' to 'AB English'. The second condition is 'Field_1583818297' 'Contains' 'A+,B+'. A green checkmark is next to the second condition. A modal window is open over the 'Field_1250' dropdown, showing the field name 'Field_1250', a description: 'An unique identifier of this form item which will be used in report output. Max character length 50.', and a 'Dropdown' type selector. At the bottom of the modal are navigation arrows, a trash icon, a settings gear, and a 'Required' toggle switch.

Can I make a field mandatory?

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.

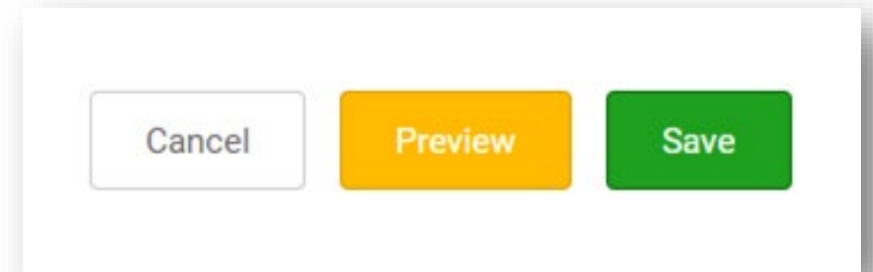
If a field has the required toggled on, it will be mandatory for all candidates



Can I see a preview of my form?

At the bottom of the page you can preview the form before saving. It is always good practice to preview the form before saving, as once it is saved, it will immediately be available for members to view and fill in.

Press Save to save your changes or Cancel to discard your changes.



How do I link my fields to events?

Fields can be added to specific event tickets through the Event Management feature. You can read more about this in the Event Management User Guide.

You can apply only full forms to tickets rather than individual fields so if you only have one question to ask, it should make up the entire form.

Note: Fields must be created in the Event Booking Overview first, so they can then be used in the event ticket purchase journey.

