ClubRunner

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[NOVA] How do I use the Form Designer?

Michael M. - 2025-08-26 - Form Designer

The Form Designer allows you to build custom forms for data collection purposes. You may access the Form Designer by following these steps:

- 1. Log in to your account through your club homepage, then click on **Member Area** on the top right under your club banner. <u>Alternatively, click here to go directly to the ClubRunner login page.</u>
- 2. In the left-hand menu navigation, click Settings.



3. Under the Workflow & Automation section, click Forms.

WORKF	OW & AUTOMATIO	N		
Forms				
Smart Lis	ts			
Automat	on Settings			

4. This will redirect you to a page with a list of existing forms. You may click the drop-down arrow to select from options to view the live form, edit the form, export its collected data, or copy or delete the form as necessary.

Fc	orms				
٩	Search				➔ Add Form
	NAME ^	LAST UPDATED 🗸	UPDATED BY 🗸	VISIBILITY 🗸	ACTIONS
+	Club Project Proposal	Jun. 18, 2025 at 4:55 p.m.	Aaron Aaronsons	Website and Mer	nber Area 🗾 👻
+	Election Survey	Jul. 11, 2025 at 10:33 a.m.	Red Bugenhagen	Website	Q , View Live Form
+	Funding Request	Jun. 18, 2025 at 4:57 p.m.	Aaron Aaronsons	Website and Me	💥 Edit
+	Scholarship Application	Jun. 18, 2025 at 4:59 p.m.	Aaron Aaronsons	Website and Me	🗘 Сору
÷	Speaker Request	Jun. 18, 2025 at 5:04 p.m.	Aaron Aaronsons	Website and Me	Export
÷	Youth Exchange Application	Jun. 18, 2025 at 5:04 p.m.	Aaron Aaronsons	Website and Me.	

5. Click **Add Form** to start creating a new form. You will be directed to the form designer where you will be able to modify the form properties, questions and workflows.

Forms

٩	Search			[+ Add Form
	NAME [▲]	LAST UPDATED 👻	UPDATED BY 🗸	VISIBILITY 🗸	ACTIONS
÷	Club Project Proposal	Jun. 18, 2025 at 4:55 p.m.	Aaron Aaronsons	Website and Member A	rea 💽
÷	Election Survey	Jul. 11, 2025 at 10:33 a.m.	Red Bugenhagen	Website	-

Setting Up Properties

You will see a Properties section on the right-hand side of the designer which you can edit as necessary, and includes the following:

>	Form Settin	ngs					
	Properties	Fields	Workflow				
	Form Details Title *						
	Club Project Proposal Name ②*						
	Club Project Proposal						
	Permalink *						
	club-project-p	proposal					

- Title: This will be the title of the form available.
- Name: Internal identifier visible only to administrators.
- Permalink: The direct URL for this form (auto-generated based on the title, but editable).
- Description: Appears at the top of the form (public-facing).
- Internal Description: Appears in the admin view/form list only.
- Access Visibility: Choose whether the form appears on the website, member area, or both.
- Roles: Restrict access to certain member roles. Leave blank for open access (within the visibility rules).
- Extra CSS Classes: Add custom CSS classes for styling the form container.

Setting Up Fields

The Fields tab is used to create fields for collecting data in your form. By default, your form includes a First Name, Last Name, Email, and CAPTCHA fields. To add a new field:

1. Click Add New Field.

> Form Setti	ngs					
Properties	Fields	Workflow				
Fields Ele	ements					
Add New Fie	ld					
Q Search	Q Search					

2. A pop-up will appear. Enter a label, which is the field name users will see. Click into the Field Type dropdown to select from the following:

				Tiltore	
I	Add New Field			×	+ 1
e *	Label *				at I
I	Field Type *	Select Type 🗸			ail
*		Select Type			na
		Address			
I		Date Time	Cancel	Save	
b		File			
		Image			
		Quantity			
		Text			
		True/False			

- $\circ~$ Address Collects a full mailing address. Includes fields like street, city, state/province, postal code, and country
- $\circ~$ Date/Time Allows users to input a date
- File Lets users upload a file (e.g., PDF, DOCX, images).
- $\circ~$ Image Allows users to upload image files (e.g., PNG, JPG).
- $\circ~$ Quantity A number field where users can enter or select a quantity.
- $\circ~$ Text Accepts typed input. You can choose between:
- $\circ~$ Single Line: For short answers like names, job titles, or emails.
- $\circ~$ Multi-line and Rich text for longer responses such as comments, messages, or feedback.
- $\circ~$ True/False Used for yes/no or agree/disagree responses

3. Click Save. Your field will appear in the form preview.

Note

You can add as many fields as you need.

To edit an existing field:

1. Hover over the field in the left panel, then click the gear icon to open the field settings.

Section	
Default Section	+ 🗹 ×
Section Description	
First Name *	•
	×

2. Edit the following options as necessary:

Edit First Name Properties

|--|

GENERAL SETTINGS

Label

🗹 Show Label

First Name

Field

A First Name First Name

🗌 Move field to new line

 $\circ~$ Show Label: Toggle the label on or off.

- $\circ~$ Move Field to New Line: Place the field below the label.
- Make Field Required: Check this to require input.
- $\circ~$ You can enter a custom validation message or use the default.
- $\circ~$ Help Text: Display additional instructions below the field.
- $\circ\;$ Tooltip: Show helpful info on hover.
- $\circ~$ Advanced UI Settings: Add custom CSS classes to the individual field wrapper.

Setting Up the Workflow

The Workflow tab in the Form Designer lets you define what happens after someone fills out and submits a form. You can automate actions, choose where users are taken next, and customize what buttons appear on the form.

Fo	rm Settin	gs				
Pro	perties	Fields	Workflow	_		
For Actio	m Button	ted sequent	ially.			
S	ave			^		
	o合 Save Form					
	o合 Create Record					
	Add Action -					
Red Cho	l irect Optio ose where to	ns go after the	form is submit	ted.		
	Success Me	ssage Page	Cu	stom Redirect		

• Form Buttons: By default, every form includes a "Save" button. When clicked, the form is submitted and a record is created behind the scenes with the submitted information. You can also add additional buttons to trigger actions, such as:

- Send Bulletin To learn more about how to send bulletins, please read the support article: <u>How</u> <u>do I create and send a Bulletin?</u>
- Send Email To learn more about how to send emails, please read the support article: <u>How do I</u> <u>compose and send an email?</u>
- Redirect Options: You can also specify what happens after someone submits the form.
 - $\circ~$ Success Message (default): This option displays a custom success message on the screen.
 - Custom Redirect: Use this to redirect users to a specific URL, page, or built-in page (e.g., event listing or homepage).

Viewing the Live Form

Use the options in the top right-hand corner of the Form Designer for the following:



- View Live Form (Website): Preview how it looks to members or public users.
- View Live Form (Admin Area): View how admins see the form.
- Save: Save your form changes.