ClubRunner



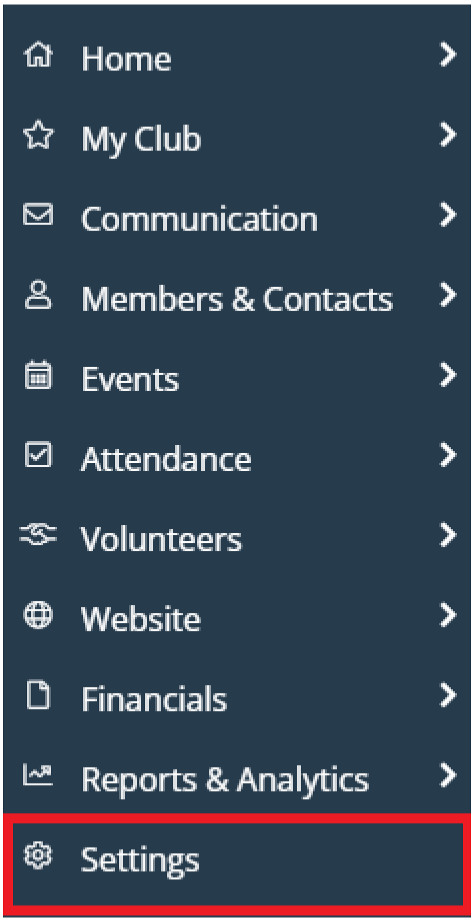
# [NOVA] How do I use the Form Designer?

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

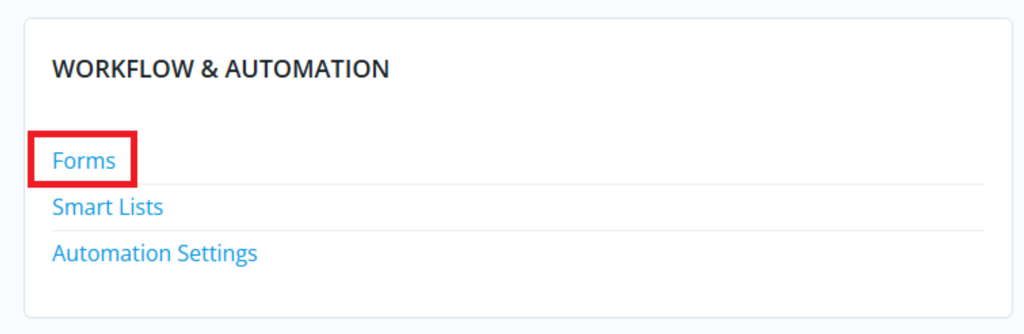
The Form Designer allows you to build custom forms for data collection purposes. You may access the Form Designer by following these steps:

1. Log in to your account through your club homepage, then click on **Member Area** on the top right under your club banner. **Alternatively, click here to go directly to the ClubRunner login page.**

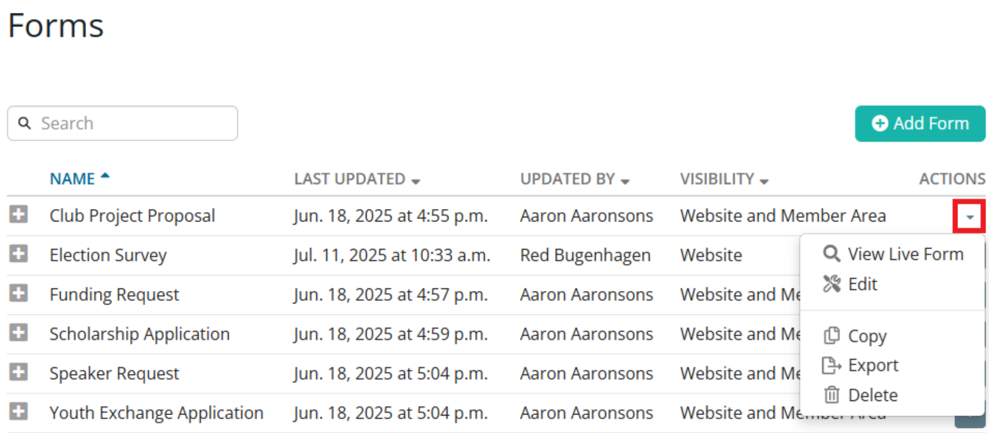
2. In the left-hand menu navigation, click **Settings.**



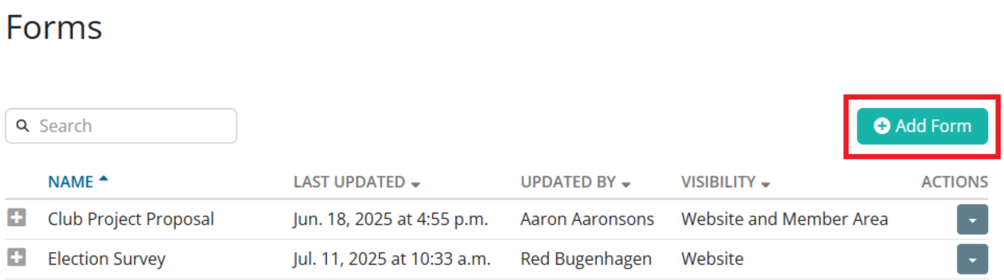

3. Under the Workflow & Automation section, click **Forms**.




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.

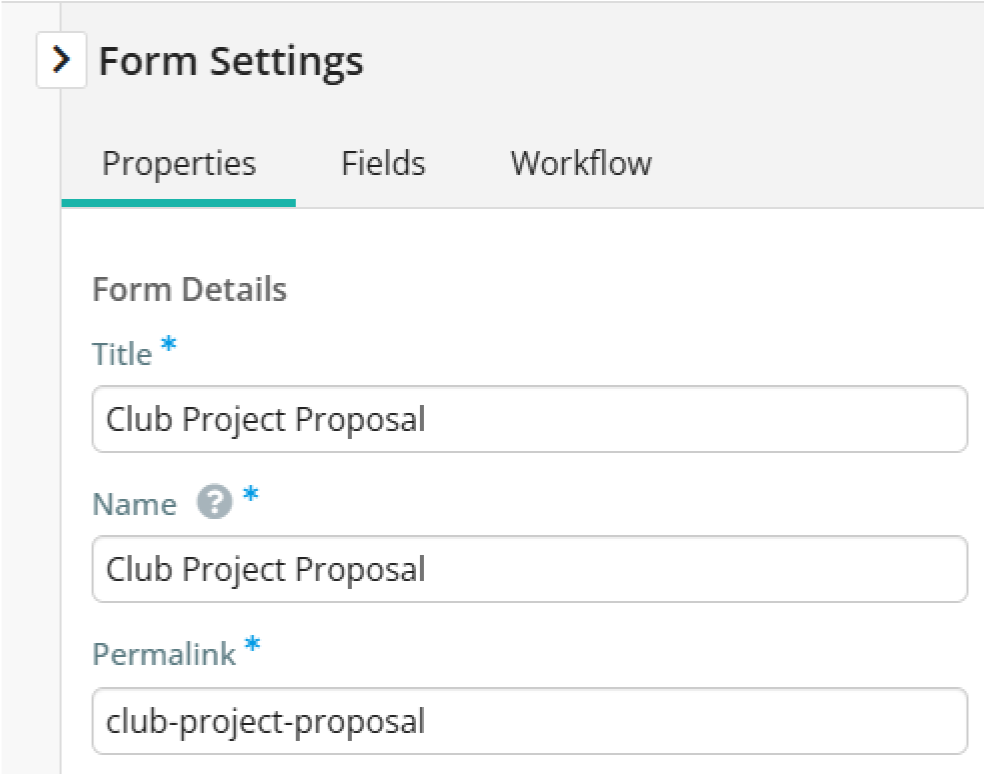



5. Click **Add Form** to start creating a new form. You will be directed to the form designer where you will be able to modify the form properties, questions and workflows.




# 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:

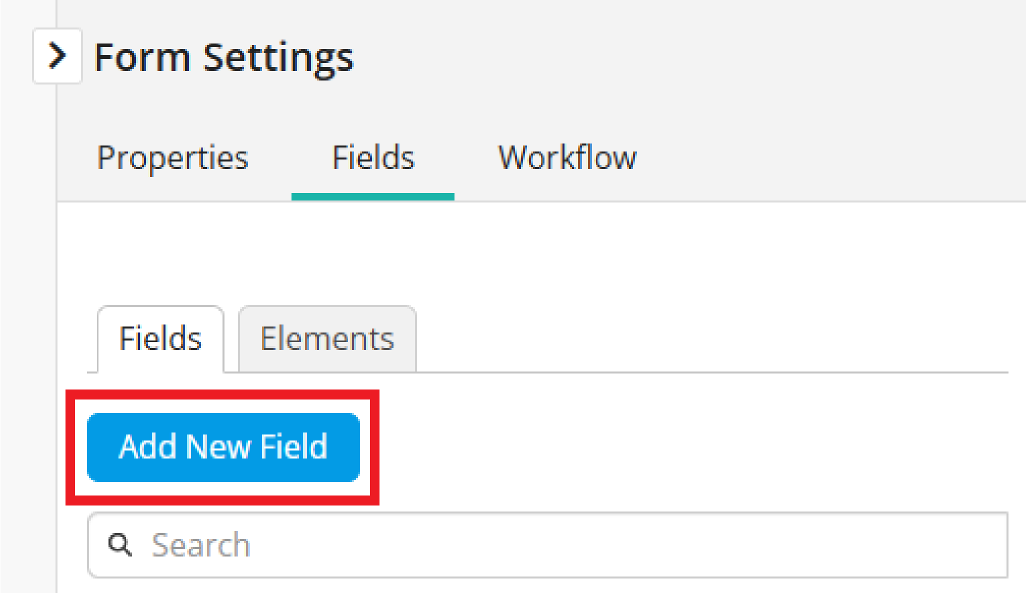



- Title: This will be the title of the form available.
- Name: Internal identifier visible only to administrators.
- Permalink: The direct URL for this form (auto-generated based on the title, but editable).
- Description: Appears at the top of the form (public-facing).
- Internal Description: Appears 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.

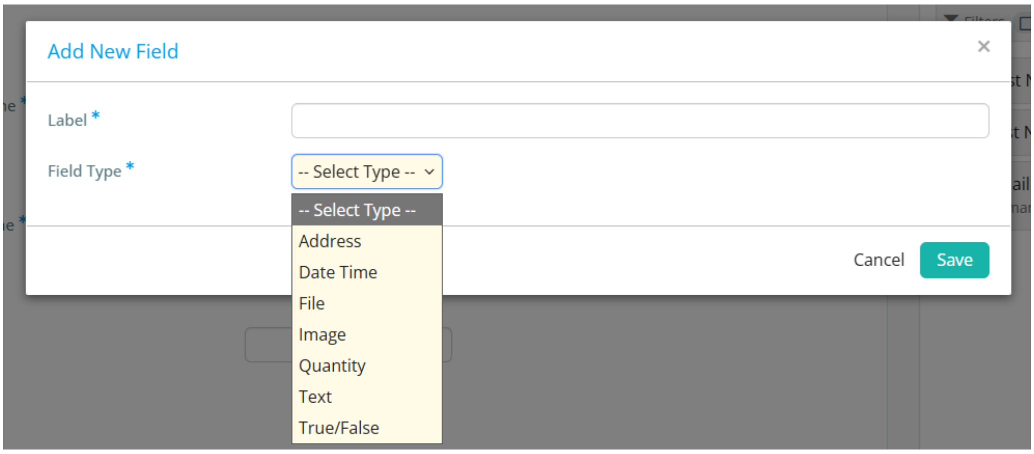
# Setting Up Fields

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**.




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




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

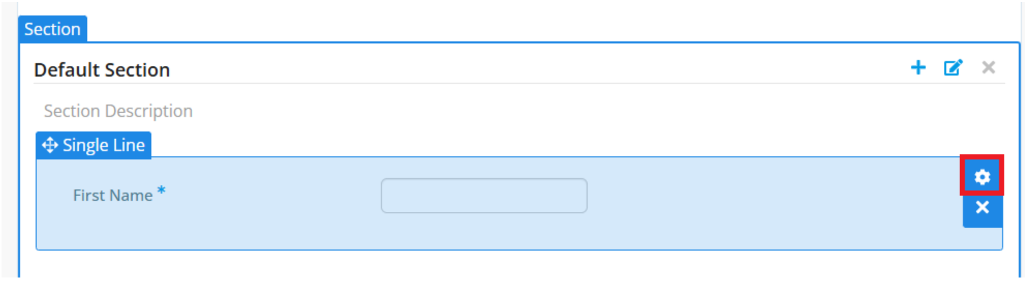
3. Click **Save**. Your field will appear in the form preview.

Note

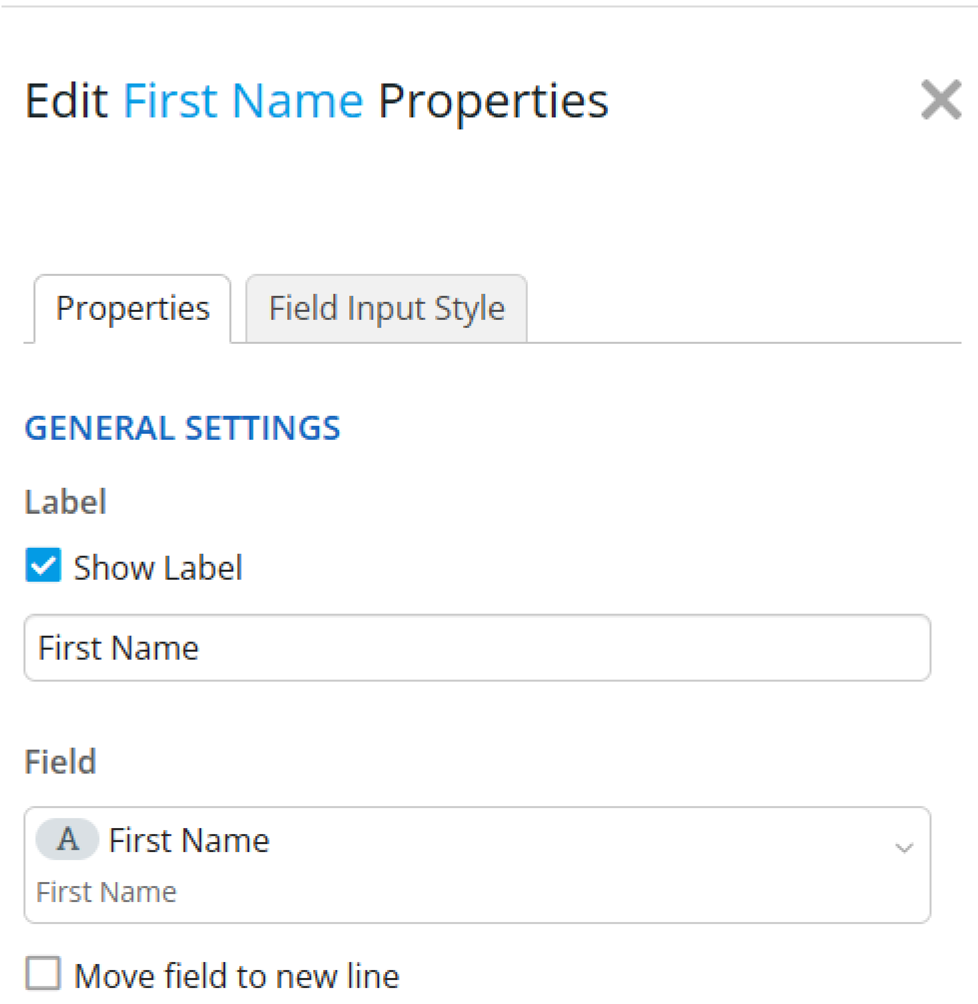
You can add as many fields as you need.

To edit an existing field:

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




2. Edit the following options as necessary:

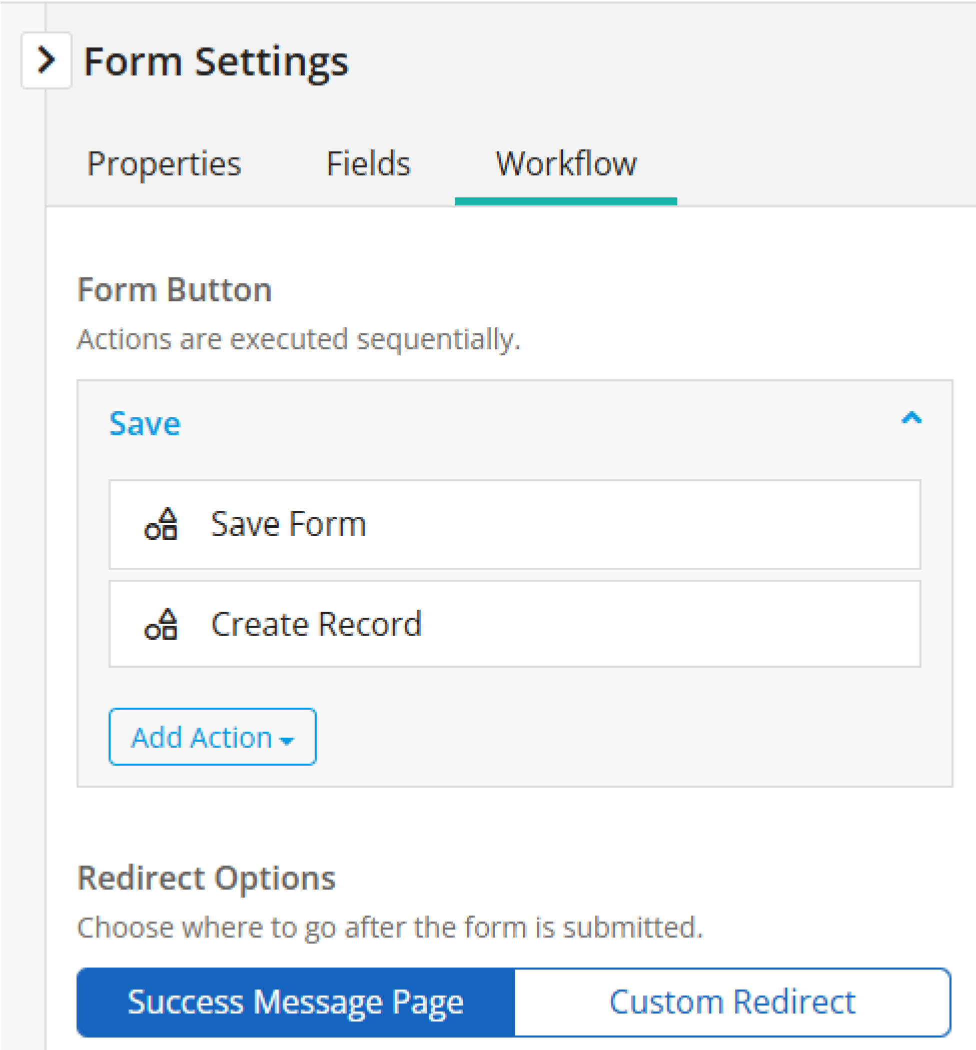



- Show Label: Toggle the label on or off.

- Move Field to New Line: Place the field below the label.
- Make Field Required: Check this to require input.
- You can enter a custom validation message or use the default.
- Help Text: Display additional instructions below the field.
- Tooltip: Show helpful info on hover.
- 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.




- 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: **[How do I create and send a Bulletin?]**

    - Send Email - To learn more about how to send emails, please read the support article: **[How do I compose and send an email?]**

- Redirect Options: You can also specify what happens after someone submits the form.

    - 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.