Form Vocabulary

Form Building Vocabulary

Steps: Page display in the form. You can create additional steps to break up information collection flow.

Categories: The containers the hold and sort your data fields. Categories can be used as filters in reporting and can collapse fields from view in a form.

Fields: The tool used to collect the data for storage in your database

Existing Fields: Fields that have been created in your database or mapped over from your back end database (example: profile member fields)

New Fields: A new field that is created because it does not exist in your database. DO NOT create new fields when an existing field is present. (example: phone number field is existing because it is a member field used often, whereas a field requesting someone's favorite color would be unique and specific to the form it lives in. This would be a new field.)

Donation Building Vocabulary

Donations: The giving form is also called *Campaigns*, or *Donations*, they are all the same type of form with commerce collection fields.

Designations: These are the holding containers or labels where monies are applied through the giving form.

Collections: The presentation of the designations inside the form. There are two primary collection displays: the *simple* (all on the page in a listing) and *advanced* (presented in a collection pop up window)

Form Build: The form is separate from the collection display in giving. The form is like the picture frame which holds the collection as a picture. This means that a collection can be moved from giving form to giving form.

Membership Building Vocabulary

Levels: Purchase options for a membership form. There is no limit to the number of levels and pricing options you can create for a form.

Membership Type:

      Limited Term: This membership type begins on a defined date or a date of purchased. The price can be fixed or pro-rated based on the effective date.

      Lifetime: This membership has no end date

Auto Renewal: this can be made an option for a level, or as a requirement based on purchase.

Promotional Code: The codes can change pricing for levels or cause hidden levels to become visible.

Event Building Vocabulary

Simple RSVP: Users are required to RSVP for the event to be registered. Activities cannot be added to the event.

Form Driven: Users who complete the event form will be registered as attending. Fee and activity are not required. Activities can be added with or without fees.

Fee Driven: Users are required to pay a registration fee on the main event to register. Events with donations supported in this model. Activities with or without fees can be added.

Activity Driven: Users who register for any activity are registered for the event. Fees can be collected on activities.

Event Building Vocabulary cont...

Fee Control: field is the default method and is a best practice for collecting fees for event attendance. It is the standard type of interface used for selling "tickets". It is a multi-price commerce item control presented in a dropdown list so that a specific fee can be directly tied to the registrant or specific guest.

The Event Registration Fee field can't be used in Events for anything other than collecting Event fees – it is by definition the field that drives registration for the Event or Activity it is used on. It cannot be used as a non-registration field.

Commerce Field: should be used for any other merchandise being sold on the event form. This is a quantity field with or without a fixed price displayed next to the box.

Naming Conventions

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Building Fields:

nameoftheform_nameofthefield

(example: class2004reunion_dinnerselection)

Building Roles:

nameoftheform_nameofthefield_nameofthevalue

(example:classof2004reunion_dinnerselection_vegitarian)