

# IMODULES

## Form Vocabulary

Vocabulary and Suggested Naming Conventions

Updated May 29, 2019

# Form Building Vocabulary

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

**Categories**: The containers that 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

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**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

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**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

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**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 continued...

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**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\_vegetarian)