How do I edit a Shared Form?

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Overview

As an organisation administrator operating within a broader hierarchy, you may be required to add content - such as products and custom fields - to an existing Membership Form which has been shared from a higher level, rather than adding a new form from scratch.
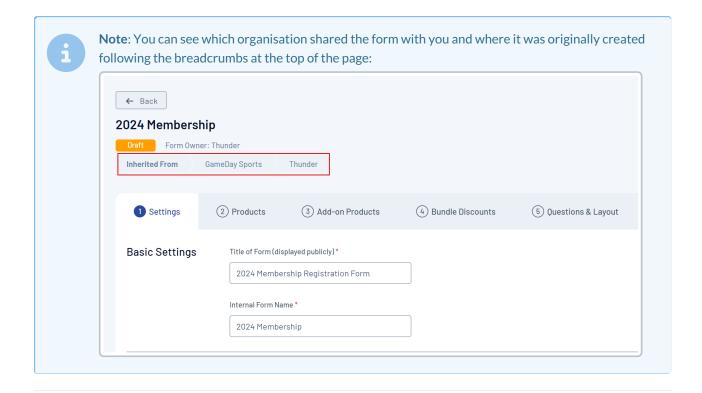
These forms are known as **Shared Forms**.

Membership Forms are a key asset and the central point to which you can add products, questions, messaging and branding to give your members a best-in-class registration journey.

When done well, setting up a Membership Form through your GameDay database can completely transform the way you operate, giving you an automated and user friendly solution for collecting memberships and fees, and developing a database with clean, relevant and valuable data.

Access a Shared Form

Your Shared Forms can be accesses from your Membership Forms list by selecting**Shared Forms** > **Use This Form**:
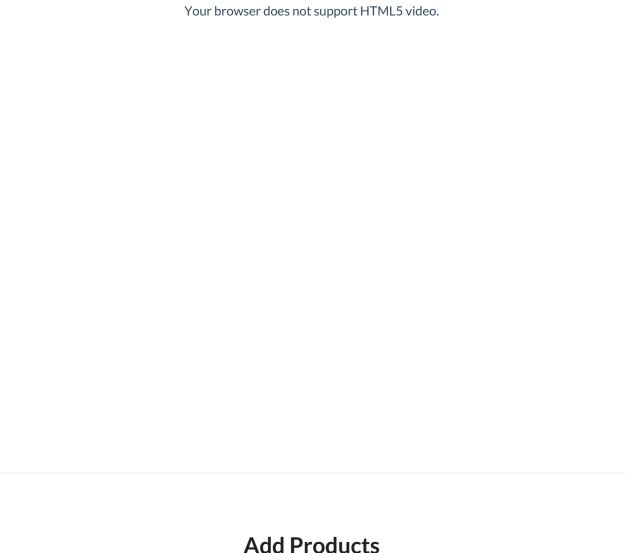
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Note: You can see which organisation shared the form with you and where it was originally created following the breadcrumbs at the top of the page:

Form Settings

In the **Settings** tab, you can edit the following information:

- **Internal Form Name** is the name that will be displayed for the form within your GameDay database
- **Title of Form (as displayed)** is the name of the form that will be displayed for members when they register
- **Show/Hide Member Types:** This setting allows you to show or hide specific Member Types which have been made available on the form from a higher level
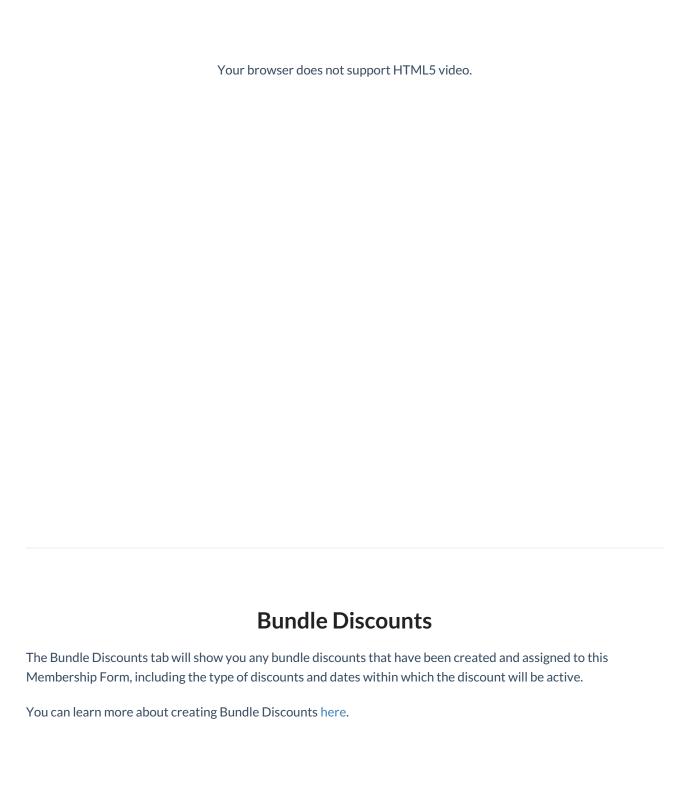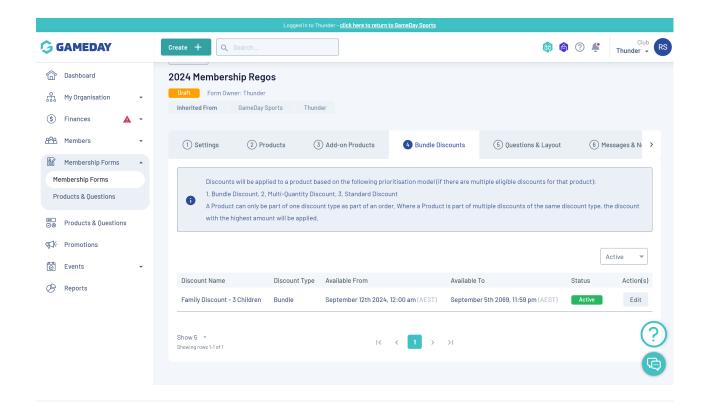
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Add Products

On the **Products** tab, you can add in relevant Products to the form in order to collect specific fees as part of this Membership Form. This tab allows multiple options for adding products, including:

- **Add Existing Products to Form**: Allows you to add any previously created products to the form.
- **Create New Product**: Allows you to create a new product from scratch and add it to the form. More information on creating products can be found here.
- **Product Group**: Allows you to categorise the display of your products on the form. More information on creating Product Groups can be found here.

You can also choose whether a product is mandatory using the Actions arrow to the right of the product and selecting **Mark as Mandatory**.

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You can also add Add-on Products to the form, such as merchandise, donations or services.

The **Add-on Products** tab allows you to add any Add-on Products in the same way you added products in the previous tab.

For more information on creating Add-on Products, click here.

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Bundle Discounts

The Bundle Discounts tab will show you any bundle discounts that have been created and assigned to this Membership Form, including the type of discounts and dates within which the discount will be active.

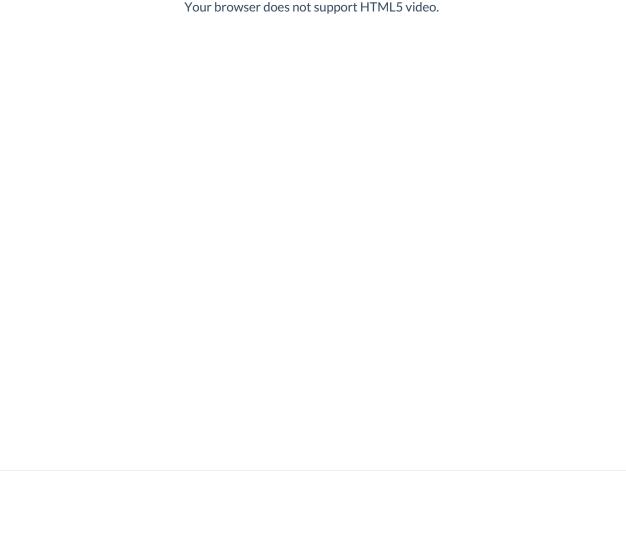You can learn more about creating Bundle Discounts here.

Add Questions

On the **Questions and Layout** tab, you can define which questions you want to ask on the form, and the order in which they will be displayed.

- **Add Existing Question**: You can add an existing question from your database or a previous form by clicking the applicable option in the list.
- **Create New Question**: Further down, you can add a new question from scratch by selecting the applicable field format and adding the question details. For more information on creating questions and question types, click here.

You also have the ability to add Header Text Blocks to categorise your questions on the form, or Paragraph Text Blocks, which can be used as a note to appear on your form. More information how to add these to your form and how they appear can be found here.

To change the order of the questions on your form, you can drag and drop the questions directly in the central panel.

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Custom Messages

On the **Messages and Notification**s tab, you can enter any custom messages you would like members to receive once they have successfully completed their registration.

- **Registration Success Email** allows you to create and customise an email that is sent to members after they register. For more information on composing a Registration Success Email, click here.
- **Payment Receipt** allows you to see the hard-coded payment receipt that is automatically sent to all members who make an online payment through your Membership Form. This is not customisable, however will automatically include your organisation logo, organisation name, products purchased, discounts redeemed and more.
- **Form Welcome/Confirmation Messages** allow you to add custom messages at the beginning and end of the registration process on the form itself. Click here for more information on welcome and confirmation messages.

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Set the form live

On the **Test & Publish** tab, you can activate your form or set Activation and Expiry Dates for your form to be activated and deactivated automatically. When applying Activation and Expiry Dates, any members who try to access the form outside of those dates will not be able to proceed through the form.

Once a form has been made active, a **Form Link** will be created for the form, so you can share this with members, on your website or social media channels.

You can also test the front end version of the form using the **View Form** button.

Once you're ready to publish your form, click **SAVE**, and you will be ready to start taking registrations!

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