How do I build a Shop Form?

04/09/2025 9:30 am AEST

Overview

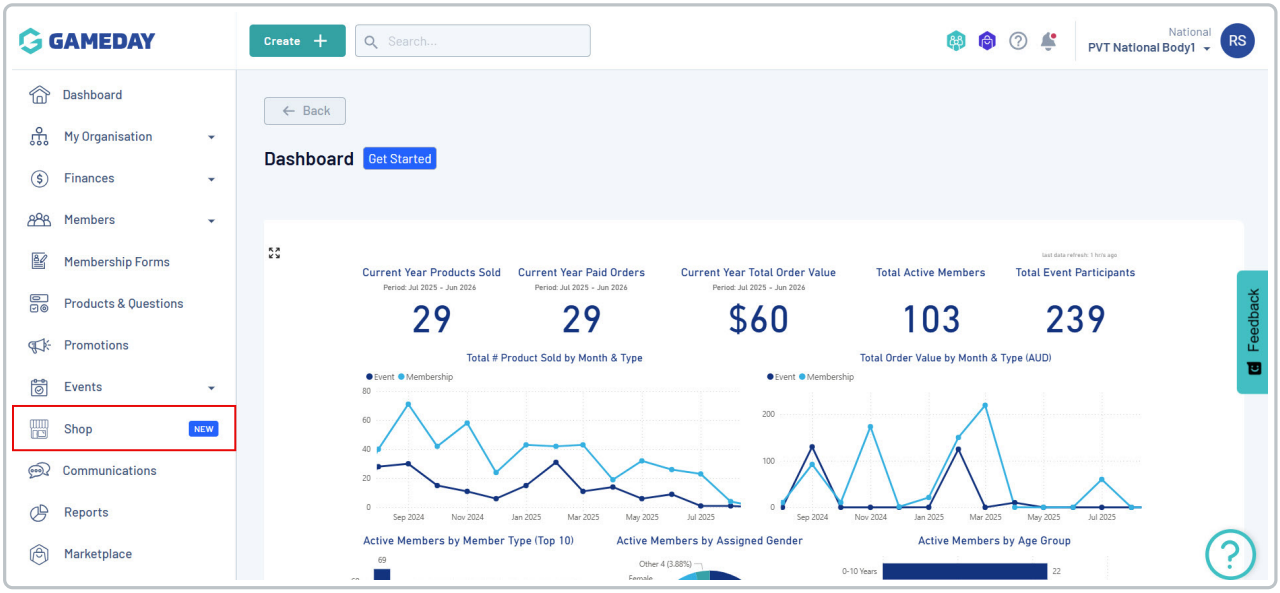
Shop forms allow organisations to sell, uniforms and merchandise, collect donations or offer other physical and non-physical goods directly to members and the public. You can create products to process payments, add variations like size and colour, and manage the entire purchase process.

This guide will walk you through creating a shop form, adding a product, and publishing it.

Step-by-Step

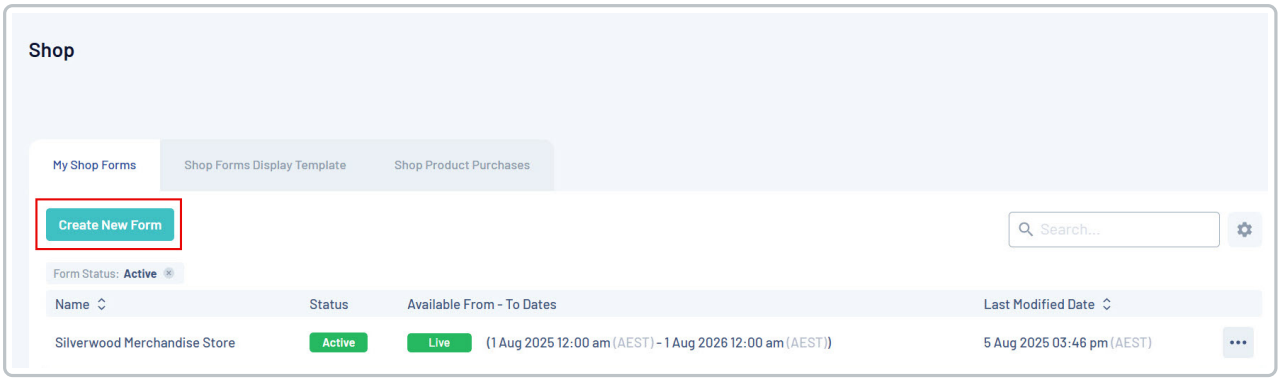
Step 1: Navigate to the Shop screen

In the left-hand menu, click **SHOP**

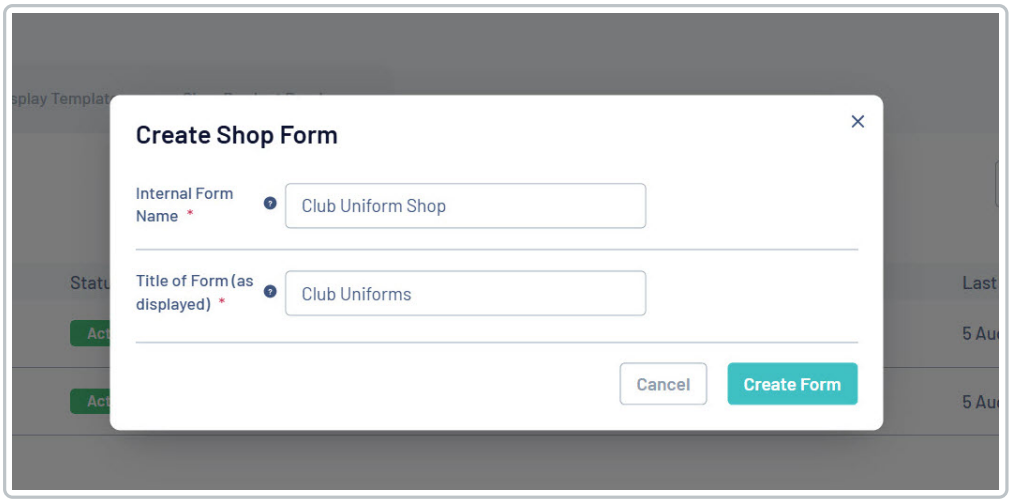


Step 2: Create a new form

On the Shop screen, click the **CREATE NEW FORM** button

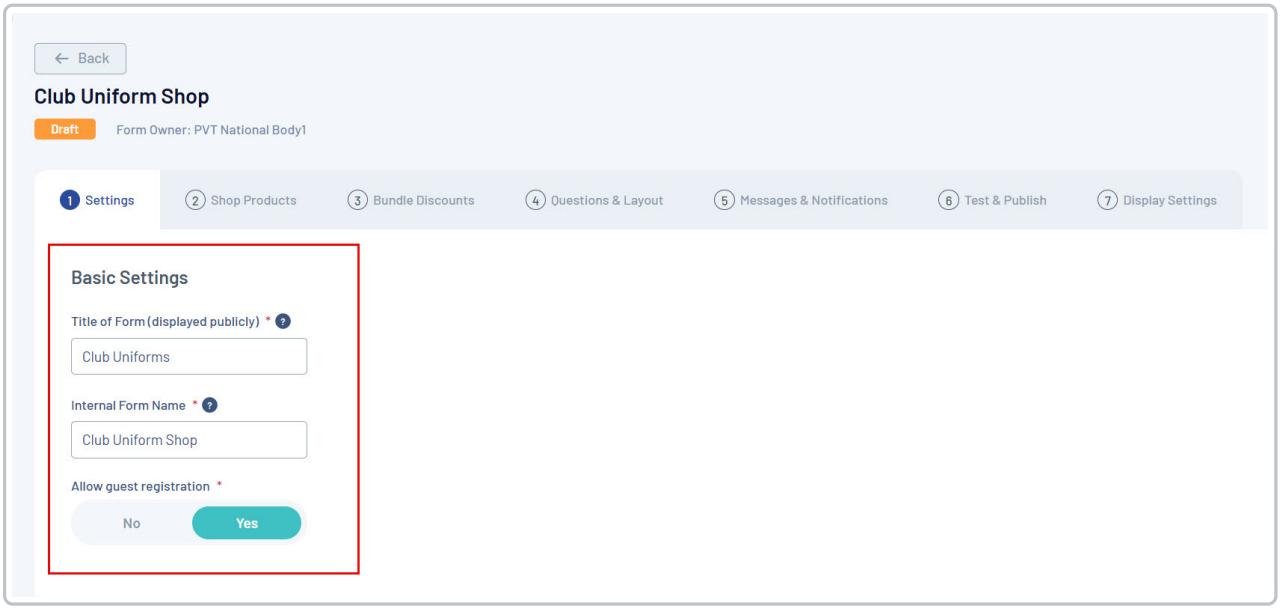


A pop-up box will appear. Enter an **Internal Form Name** (for admin use) and a **Title of Form** (what participants will see), then click **CREATE FORM**



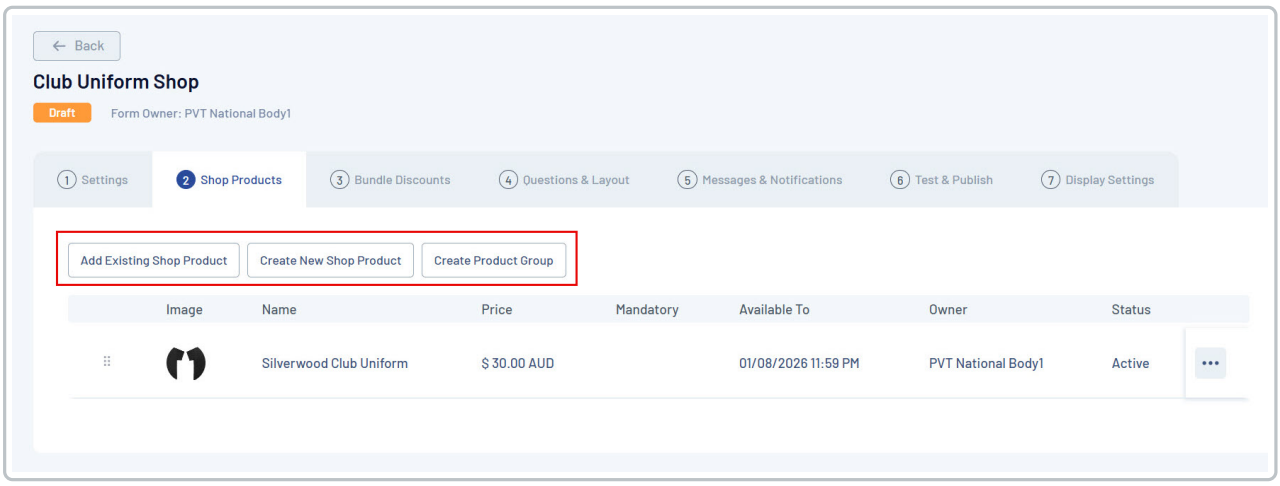
Step 3: Apply your basic settings

On the **SETTINGS** tab of the shop form, you can review the form names or enable**Guest Registration**, which allows registrants to go through the form without creating an account



Step 4: Add your shop products

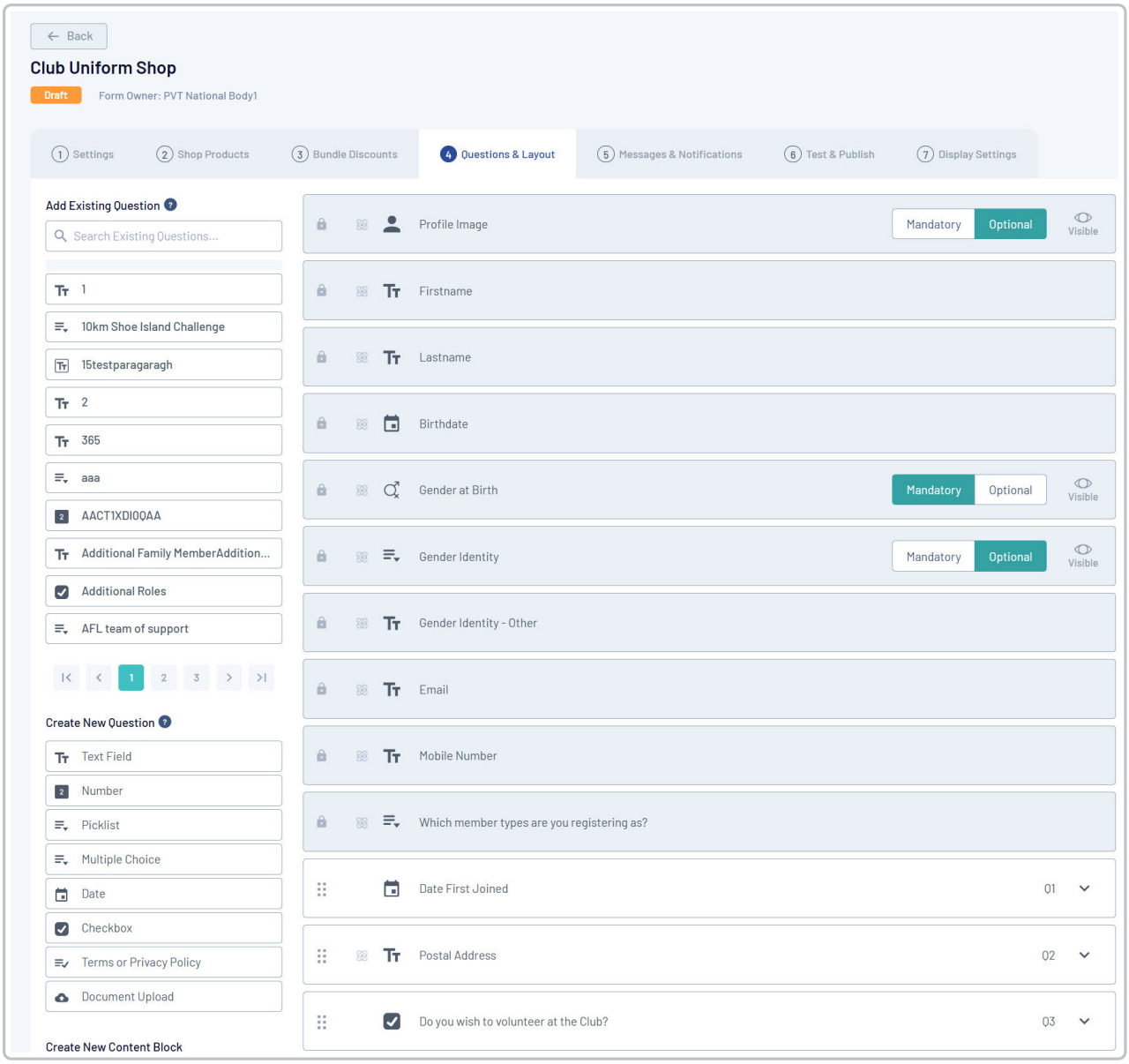
Navigate to the **SHOP PRODUCTS** tab to add your products to the form. If you have any existing existing shop products in your database, you can use the **Add Existing Shop Product** button to add them directly onto the form, otherwise you can create a shop product from scratch using the **Create New Shop Product** button - you can learn more about creating Shop Products here.



Once you have products on the form, you can also use the **Create Product Group** button to cluster different products by category. You can learn more about creating Product Groups here.

Step 5: Add questions to the form

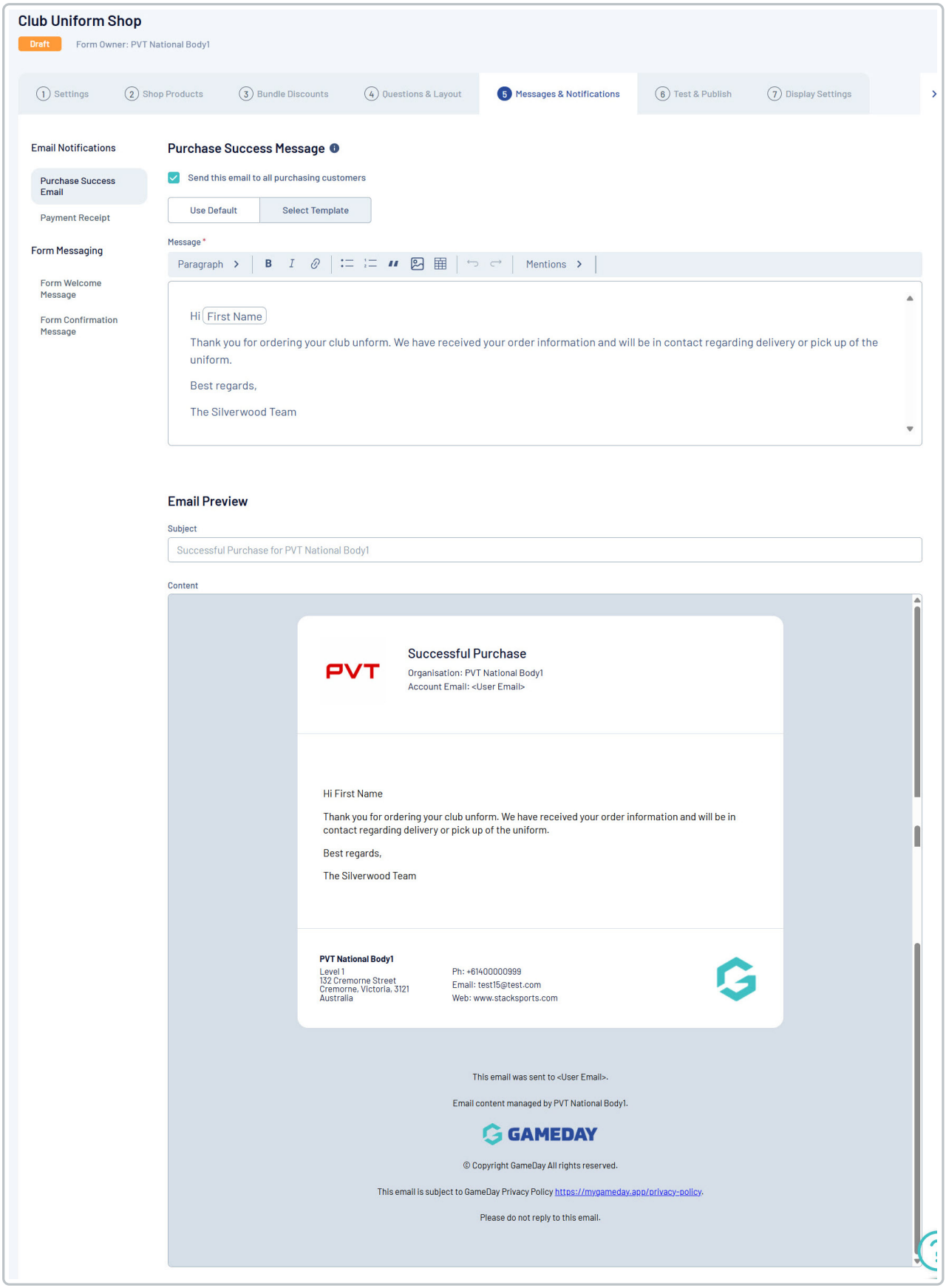
The **QUESTIONS & LAYOUT** tab allows you to add any additional questions or Ts & Cs to the shop form to collect from the purchaser



Step 6: Configure any custom messages

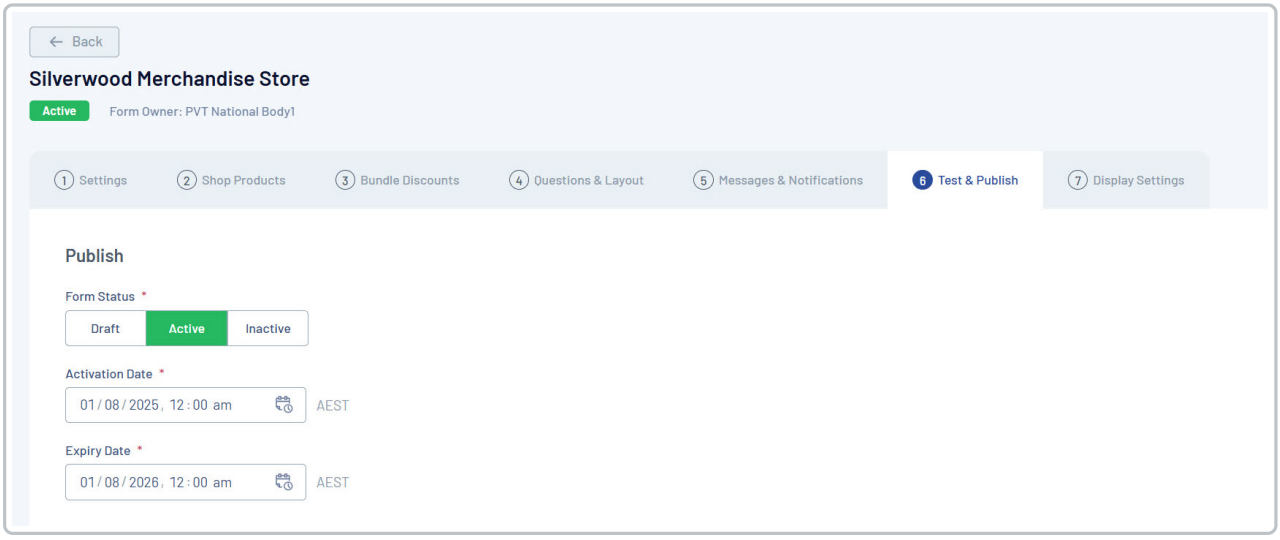
The **MESSAGES & NOTIFICATIONS** tab allows you to add custom messaging to the form, including:

- **Purchase Success Message**: Add a message that will be sent by email to the purchaser once the shop form is completed
- **Form Welcome Message**: Add an on-screen message for registrants on the first page of the form
- **Form Confirmation Message**: Add an on-screen message for registrants on the last page of the form, after payment has been made



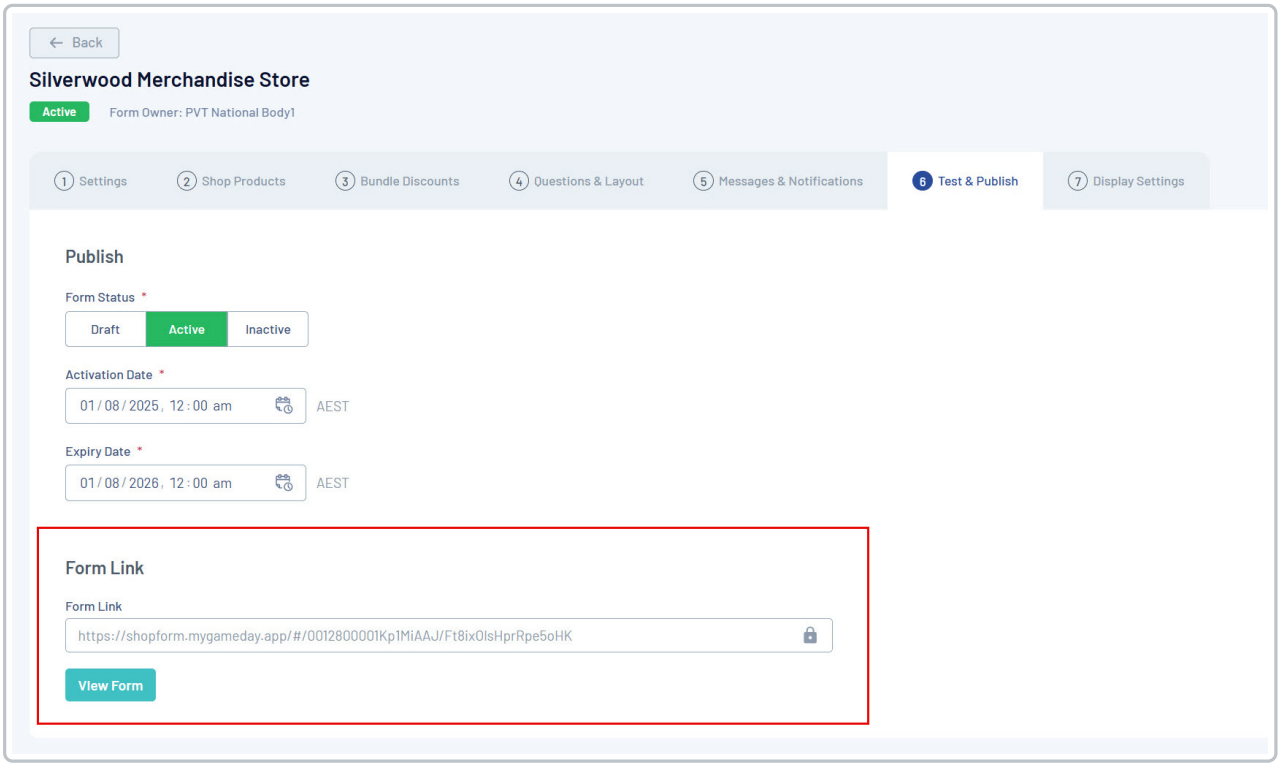
Step 7: Publish the form

On the **TEST & PUBLISH** tab, you can set the **Form Status** to **Active** to make the form live. You can also enter an **Activation Date** and an optional **Expiry Date** to trigger the form to activate and deactivate automatically on a certain date and time



Step 8: View your live form

Once saved, a **Form Link** will be generated. You can copy this link to share it, or click the **VIEW FORM** button to see the live version of your shop.



Watch