



PROGRESSIVE TECHNOLOGY PROJECT

Collecting & Displaying Data: A Primer on Profiles

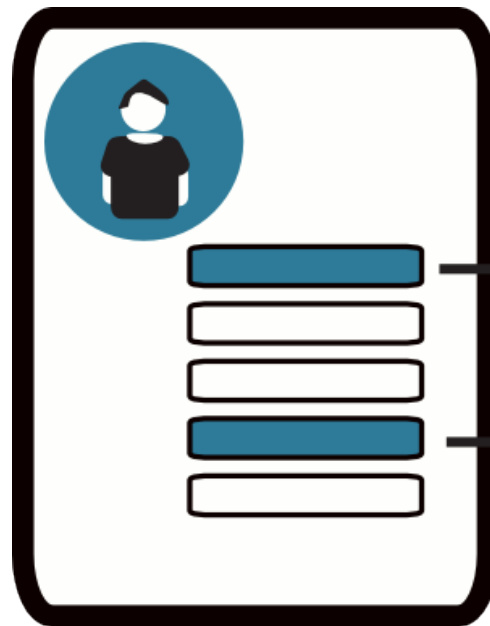
What's a profile?

It's a set of fields.

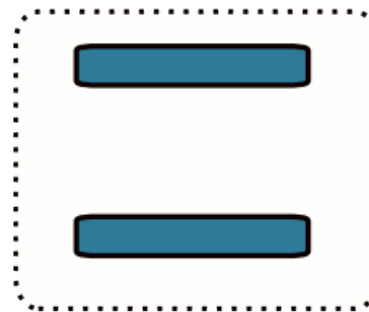


- Another way to look at it:

Your whole database



Just the fields you care about –
aka, your Profile



What are Profiles for?

2 purposes:

- Collecting data
- Displaying data
- (ok, and updating data using Batch Update via Profile, but let's leave that for now)



- **Collecting data**
 - External: Events, petitions, contributions, newsletter sign-up or other external form on your website
 - Internal: easy (standardized) data entry form for your staff



You filled out a profile when you registered for this PowerBase training (or someone did for you).

Address and additional contact info

Home Street Address *

Additional Address (unit, apt)

City *

State *

Zip *

Organization Name *

Participant's Emergency Contact Info * Please include your contact's full name and primary phone number.

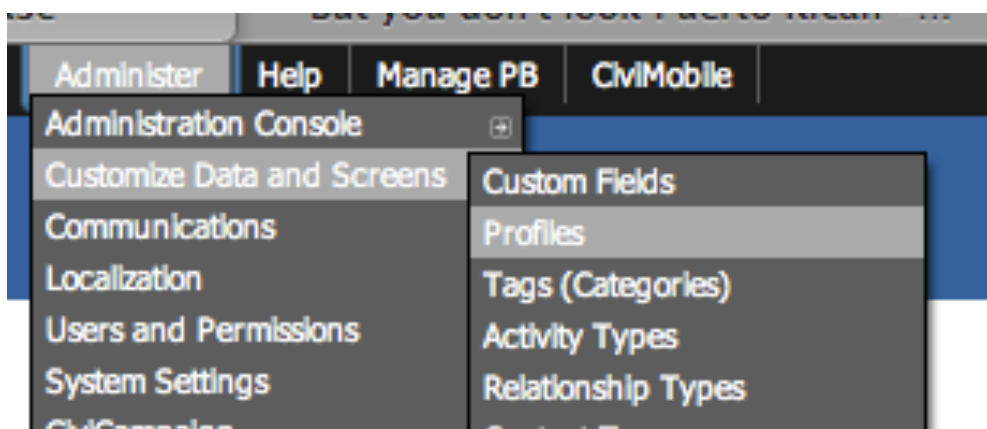
PB Tracks

PowerBase Training Tracks * ☐ PowerBase: Fundamentals
☐ PowerBase: Advanced Topics
☐ PowerBase: Fundraising

PB Pre-Training Questions

Which PowerBase components are you using? * ☐ Campaigns
☐ Contributions
☐ Mailings
☐ Events
☐ Memberships
☐ Reports

1



Home » CiviCRM » Administer CiviCRM

2

Profiles

CiviCRM Profile(s) allow you to aggregate groups of fields and selectively share contact information. ?

[+ Add Profile](#)

User-defined Profiles

Reserved Profiles

▲ Profile Title

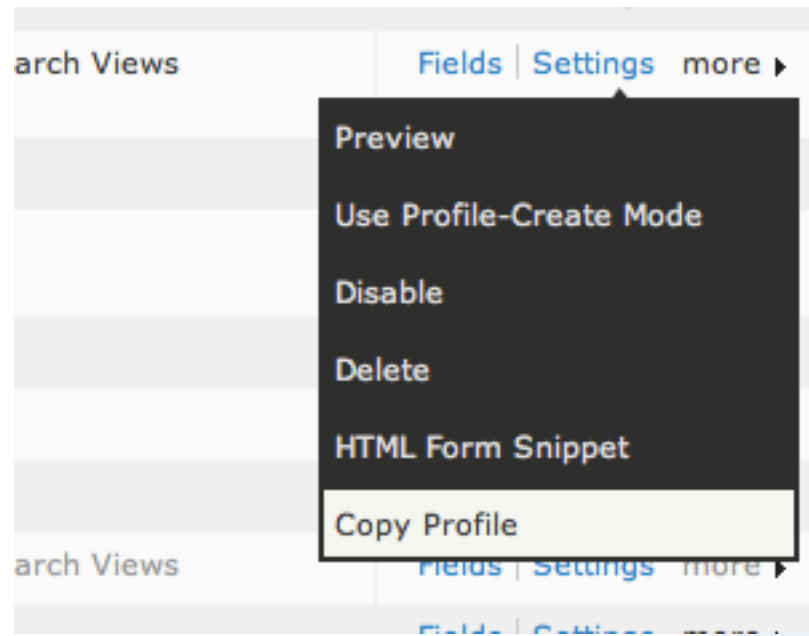
Activity Profile View

Actual Travel Amount Paid

Address and additional contact Info

Annual Budget

OR copy an existing Profile



Rename it

Contact Info & Role	Individual, Contact	65	Standard CiviEv
Copy of Update Grassroots Info	Individual, Contact	92	Standard
Current Employer	Individual, Contact	39	Search
Dietary & Lodging, and Emergency Contact Info	Individual,	56	Standard



Contact Info & Role	Individual, Contact	65	
Update Grassroots Info & Issue Interest	Individual, Contact	92	
Current Employer	Individual, Contact	39	
Dietary & Lodging, and Emergency Contact Info	Individual, Contact.	56	

Add/edit fields

Update Grassroots Info & Issue Interest - CiviCRM Profile

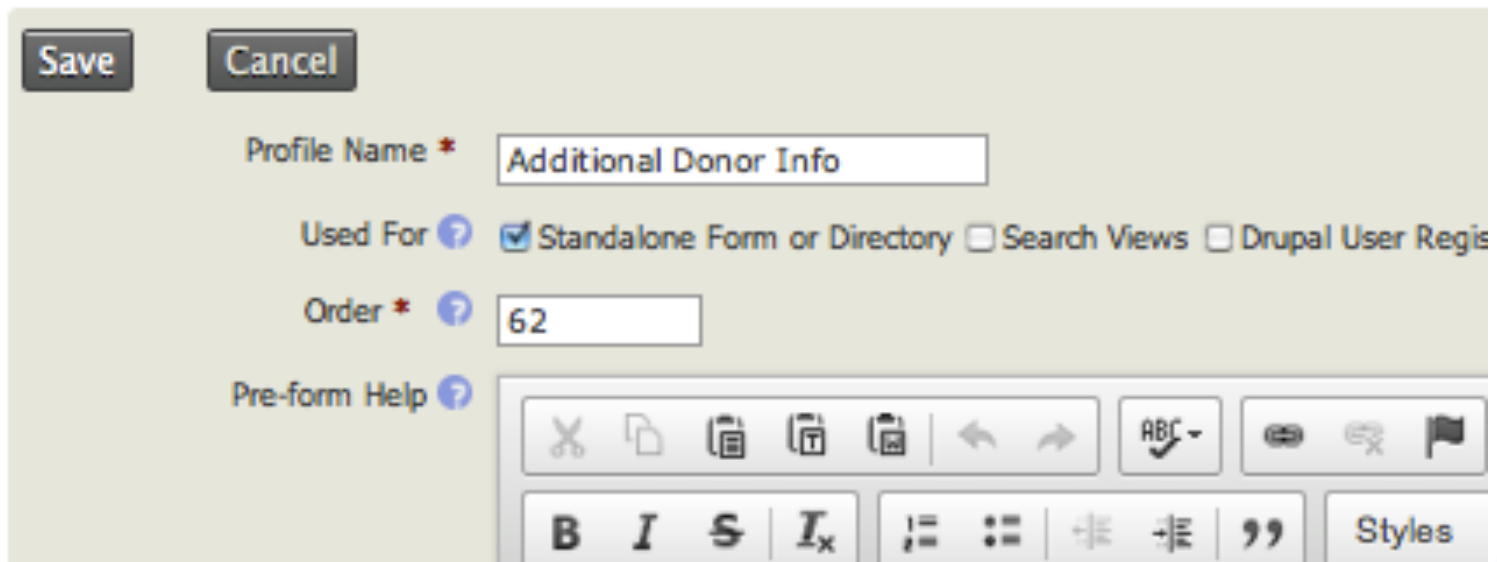
[+ Add Field](#)
[✎ Edit Settings](#)
[📄 Preview \(all fields\)](#)
[▶ Use \(create mode\)](#)

Field Name	Visibility	Searchable?	In Selector?	Order
Grassroots...: Volunteer Interests (Individual)	User and User Admin Only	No	No	
First Name (Individual)	Public Pages and Listings	No	Yes	↕ ↑
Last Name (Individual)	Public Pages and Listings	No	Yes	↕ ↑
Email (Contact)	Public Pages and Listings	No	Yes	↕ ↑
Phone (Contact)	Public Pages and Listings	No	Yes	↕ ↑
Grassroots...: Issues Interest (Individual)	User and User Admin Only	No	No	↕ ↑
Grassroots...: Leadership Level (Individual)	User and User Admin Only	No	No	↕ ↑

[+ Add Field](#)
[✎ Edit Settings](#)
[📄 Preview \(all fields\)](#)
[▶ Use \(create mode\)](#)

Whether you add a totally new Profile or copy one, give your profile a descriptive name that reflects what it's used for!

New CiviCRM Profile



Save Cancel

Profile Name * Additional Donor Info

Used For  ☒ Standalone Form or Directory ☐ Search Views ☐ Drupal User Registration

Order *  62

Pre-form Help 

B *I* ~~S~~ *I_x*      Styles

Wait!

What about adding everyone who fills out this form to a group?!

Make a new group first.

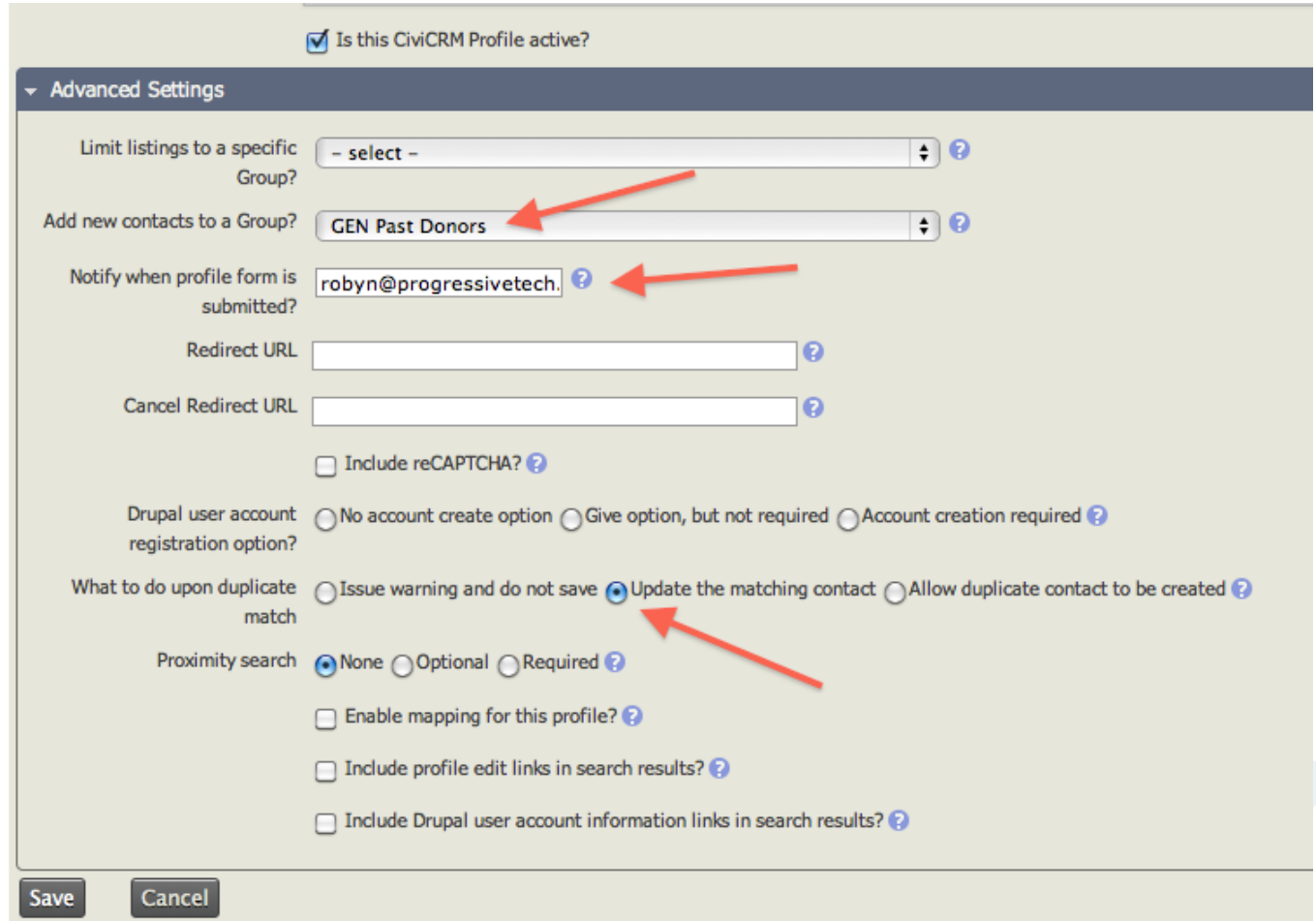


- **Manage Groups > Add New Group**....you know the drill.
- Once that's done, you're ready to finish setting up the profile.



Scroll down to the Advanced Settings....

1. Add to a group?
2. Notify someone?
3. Update matching contact?



☒ Is this CiviCRM Profile active?

▼ Advanced Settings

Limit listings to a specific Group? ?

Add new contacts to a Group? ?

Notify when profile form is submitted? ?

Redirect URL ?

Cancel Redirect URL ?

☐ Include reCAPTCHA? ?

Drupal user account registration option? ☐ No account create option ☐ Give option, but not required ☐ Account creation required ?

What to do upon duplicate match? ☐ Issue warning and do not save ☒ Update the matching contact ☐ Allow duplicate contact to be created ?

Proximity search ☒ None ☐ Optional ☐ Required ?

☐ Enable mapping for this profile? ?

☐ Include profile edit links in search results? ?

☐ Include Drupal user account information links in search results? ?

Practice!

- Make a new profile (**copy, rename, edit**; don't just reuse)
- Add your favorite field to it
- Get the HTML snippet and paste it into this website:

OR

- Hit Profile-create Mode



So.....

What happens when you try to add a field from Organization data and Individual data to the same profile?



- Displaying Data
 - Internal: Search View
 - External: List of Contacts such as a Member List (use with caution)



You know when you do an Advanced Search and the results show data you don't care about?

Advanced Search

▸ Edit Search Criteria ?

513 Contacts

Contact Type - 'Individual' ...AND...
Participant Role = Attendee

Select Records:

☐ All 513 records ☐ 0 Selected records only

Print

- actions -

Go

[Next >](#) [Last >>](#) Contact 1 - 50 of 513

[A](#) [B](#) [C](#) [D](#) [E](#) [F](#) [G](#) [H](#) [I](#) [J](#) [K](#) [L](#) [M](#) [N](#) [O](#) [P](#) [Q](#) [R](#) [S](#) [T](#) [U](#) [V](#) [W](#) [X](#) [Y](#) [Z](#) [All](#)

Reset all selections

☐	☐	▲ Name	◆ Home Address	◆ City	◆ State	◆ Zip	◆ Phone (Primary)	◆ Constituent Type
☐		Aaron, Lillie	584 Granada Ave Apt 107	Youngstown	OH	44505	330-555-1745	Member
☐		Abron, Clara	797 Dean St	Youngstown	OH	44505	330-555-2387	Member, Donor
☐		Acri, Barbara	1215 5Th Ave	Youngstown	OH	44504	330-555-3468	Member
☐		Adamiak, James	1216 5Th Ave Rm 308	Youngstown	OH	44504	330-555-1251	Member
☐		Adams, Americo	834 E Midlothian Blvd Apt 19	Youngstown	OH	44502	330-555-1673	Donor
☐		Adams, Charles	610 Griffith St Apt 162	Youngstown	OH	44510	330-555-1678	Donor

You can fix it.

How? Create a new Search View.

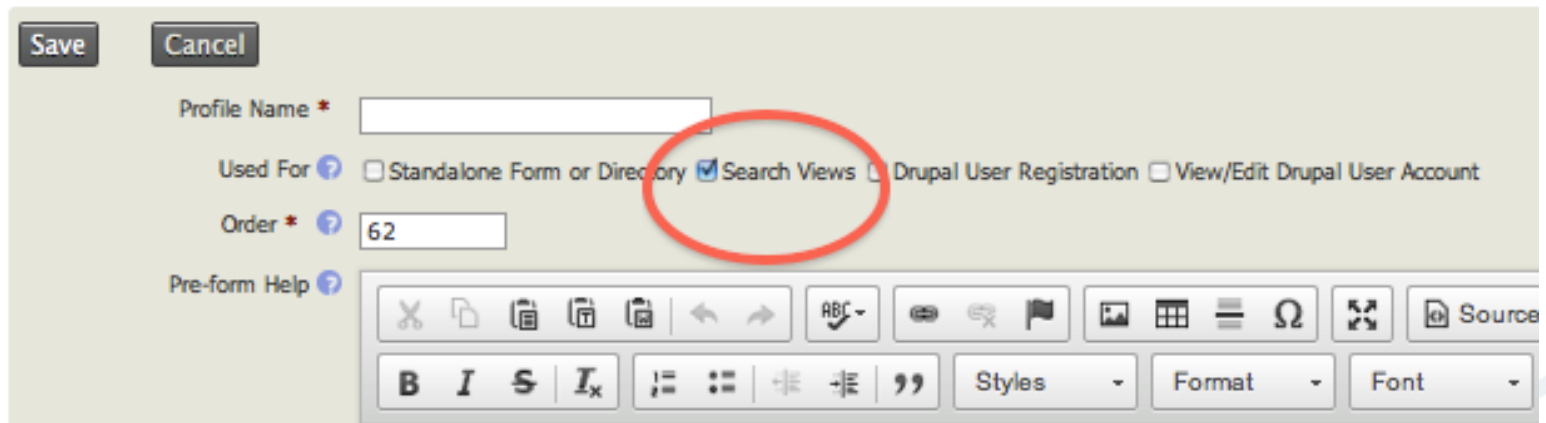
It's a matter of putting the right set of fields together. (Sound familiar?)



Same steps to adding a new profile....

Just make sure you check this little box:

New CiviCRM Profile



The screenshot shows the 'New CiviCRM Profile' form. At the top left are 'Save' and 'Cancel' buttons. Below them are three fields: 'Profile Name *' (empty), 'Used For ?' (a row of four checkboxes: 'Standalone Form or Directory' (unchecked), 'Search Views' (checked and circled in red), 'Drupal User Registration' (unchecked), and 'View/Edit Drupal User Account' (unchecked)), and 'Order * ?' (containing the number '62'). At the bottom left is a 'Pre-form Help ?' link. The bottom right features a rich text editor toolbar with icons for cut, copy, paste, undo, redo, bold, italic, strikethrough, bulleted list, numbered list, link, unlink, text color, background color, source code, and a 'Source' button. Below the toolbar are buttons for 'B', 'I', 'S', 'I_x', 'List', 'List', 'Link', 'Unlink', 'Quote', 'Styles', 'Format', and 'Font'.

Add or edit the fields in the Profile.

Contact & Constituent Constituent Info - CiviCRM Profile Fields

[Add Field](#)
[Edit Settings](#)
[Preview \(all fields\)](#)
[Use \(create mode\)](#)

Field Name	Visibility	Searchable?	In Selector?	Order	Required	View Only	Reserved	
First Name (Individual)	Public Pages	No	Yes	↓ ↓	No	No	No	Edit Preview more ▶
Last Name (Individual)	Public Pages	No	Yes	↑ ↑ ↓ ↓	No	No	No	Edit Preview more ▶
Constituent Type (Individual)	Public Pages	No	Yes	↑ ↑ ↓ ↓	No	No	No	Edit Preview more ▶
Staff Responsible (Individual)	Public Pages	No	Yes	↑ ↑ ↓ ↓	No	No	No	Edit Preview more ▶
Leadership Level	Public Pages	No	Yes	↑ ↑ ↓ ↓	No	No	No	Edit Preview more ▶

Change their visibility
to **Public Pages**.

Contact & Constituent Constituent Info - CiviCRM

Edit Field - Staff Responsible

Save Save and New Cancel

Field Name Individual Staff Responsible :: Constituent I
Select the type of CiviCRM record and the field you want to include

Field Label ? Staff Responsible

Required? ? ☐

View Only? ? ☐

Visibility ? Public Pages

Searchable? ? ☐

Results Column? ? ☒

Field Pre Help ?

Field Post Help ?

Order * ? 5

Active? ? ☒

Save Save and New Cancel

Contact & Constituent Constituent Info - CiviCRM Profile Fields

[+ Add Field](#) [✎ Edit Settings](#) [📄 Preview \(all fields\)](#) [▶ Use \(create mode\)](#)

Field Name	Visibility	Searchable?	In Selector?	Order
First Name (Individual)	User and User Admin Only	No	No	↓ ↓
Last Name (Individual)	User and User Admin Only	No	No	↕ ↑ ↓ ↓
Constituent Type (Individual)	User and User Admin Only	No	No	↕ ↑ ↓ ↓
Staff Responsible (Individual)	Public Pages	No	Yes	↕ ↑ ↓ ↓
Leadership Level (Individual)	Public Pages	No	Yes	↕ ↑ ↓ ↓
Kids? (Individual)	Public Pages	No	Yes	↕ ↑ ↓ ↓
Date Started (Individual)	Public Pages	No	Yes	↕ ↑

[+ Add Field](#) [✎ Edit Settings](#) [📄 Preview \(all fields\)](#) [▶ Use \(create mode\)](#)

- Question:
 - If you delete a field from a Profile, are you deleting the field from the database?



3 final points.....



1. Back to the worksheet:

What data did you say you wanted to collect routinely? Is that in a profile that everyone knows they should collect for every online event, contribution, petition, etc?

(And org staff knows they shouldn't alter this profile, right?)



2. Collecting addresses – how to really mess up your data

If you just collect zip code....

If you collect Primary address...

If you collect Home address....

Solution: for Profiles, collect a special address called “Web”



3. Deduping considerations

Are you collecting the right data so that your dedupe rules can work?

For example, if the dedupe rule uses first/last/email address, you should collect that data in your regularly used profiles.

Otherwise, you may be getting more duplicates than you should be.

