

# Preparing a Profile Form for Online Event Registration Signup, Contributions or to Collect Email addresses

## Introduction

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To collect information from your web site, you have to tell PowerBase what fields you would like to collect. For example, if you'd like to send newsletters to supporters, you'll need to collect email address, at minimum, and first name and last name and possibly an address field such as zip code. Your set of fields might look like this:

First Name  
Last Name  
E-mail address  
Home Zip code

If you're collecting registrations for a fundraising dinner, you might need to collect additional information such as the full street address and dietary preferences. Some of this data might not be predefined as part of PowerBase. In that case, you'll will have to create custom fields. It's outside the scope of this document to describe the best practices for creating custom fields.

We refer to any data collected from your external public-facing pages that appear on your web site or directly on your PowerBase site as "on-line", "public", or "external" and data input by you or your colleagues who have logged in as "off-line", "User and User Admin Only", or "internal". Of course, all of it is online, but this is a convenient way to separate out pages that you are preparing for the general public and pages that will be used internally.

Once you define the information you would like to collect, you will need to create a "**profile**". **Profile is an arrangement of one or more data fields that are in your database.** Profiles can be used to collect new data, change field data or to display data. Profiles can contain information from the contact table, the event participant table, the activity table, the membership table or the contribution table. You may combine fields from the contact table (individuals or organizations are stored in the contact table) and optionally one of the other tables. You cannot make any other combination of tables in a profile at this time, nor can you put organization and individual information on the same profile.

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*Since this document is all about public profiles, we won't be describing all the other ways that you can use profiles, which include Batch Update via Profile, showing different Search Results in Advanced Search, and for simplified Data Entry screens.*

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This section draws on information from the CiviCRM manual. This section covers profiles: <http://book.civicrm.org/user/current/organising-your-data/profiles/>

# Preparing a Profile Form for Online Event Registration Signup, Contributions or to Collect Email addresses

## Orientation

If you have Administer menu access, you can create the profile going to **Administer>Customize Data and Screens>Profiles**.

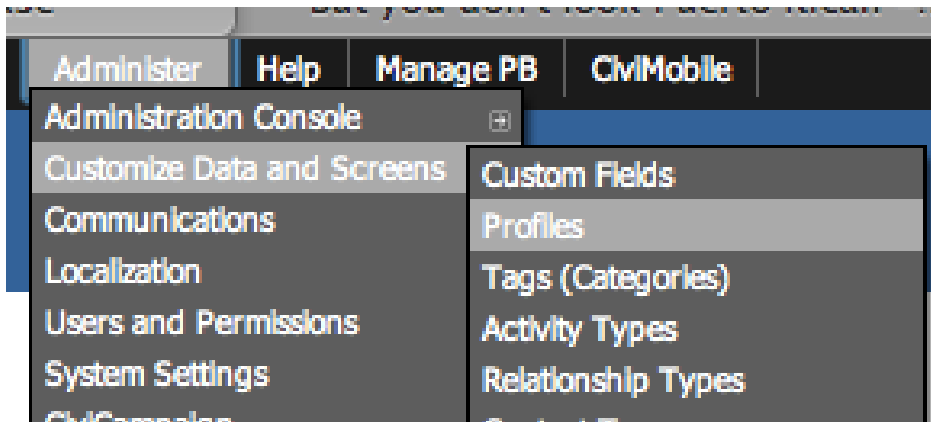


Figure 1 Finding the Profile Menu

You will come to another screen that allows you to add or update an existing profile. It has two tabs: **User-defined Profiles** and **Reserved Profiles**. We are interested in the User-defined Profiles for this document, but from time to time knowing where the Reserved Profiles are stored can come in handy for changing some default settings.

Home » CiviCRM » Administer CiviCRM

## Profiles

CiviCRM Profile(s) allow you to aggregate groups of fields and include them in your site as input forms, contact display pages, and search and listings features. They provide a powerful set of tools for you to collect information from constituents and selectively share contact information.

[Add Profile](#)

**User-defined Profiles** Reserved Profiles

Profile Title	Type	ID	Used For	Fields	Settings	more
Name and Address	Individual, Contact	1	Standalone Form or Directory, CiviEvent, Search Views, View/Edit Drupal User Account, CiviEvent_Additional	<a href="#">Fields</a>	<a href="#">Settings</a>	<a href="#">more</a>
Update Contact Information	Individual, Contact	3	Standalone Form or Directory, CiviEvent, CiviEvent_Additional	<a href="#">Fields</a>	<a href="#">Settings</a>	<a href="#">more</a>
Update Grassroots Info	Individual, Contact	4	Standalone Form or Directory	<a href="#">Fields</a>	<a href="#">Settings</a>	<a href="#">more</a>
Participant Dietary & Lodging Info	Participant	5	Standalone Form or Directory, CiviEvent, CiviEvent_Additional	<a href="#">Fields</a>	<a href="#">Settings</a>	<a href="#">more</a>

Figure 2 The Profile Selection Page

The list includes the **Profile Title** which is name of the profile which, by the way, is used on Public facing pages as the heading above the fields,

# Preparing a Profile Form for Online Event Registration Signup, Contributions or to Collect Email addresses

**Type**, which indicates which tables are being used,

**ID** is very important. It's used to differentiate among all the profiles that you have. You need to know it in many cases for external web form use.

**Used for**, which shows the uses that it can have. On the right you have some options for modifying the profile.

**Fields** brings up the list of fields associated with the profile.

**Settings** changes the overall profile. It has fields like Profile Name (aka Profile Title), help text, and some other critical information.

The **more** option includes additional actions.

- **Preview** shows the entire profile.
- **Use Profile-Create Mode** will allow you to do data entry with the profile, if it's been set up for that.
- **Disable** makes the profile unavailable for use, but does not delete it.
- **Delete** *does* delete it. Deleting a profile will not delete any data in your database, but it may cause a problem if the profile is in use on an external page somewhere.
- **HTML Form Snippet** opens a page with html coding that can be copied and used in another web site. This is typically used in situations where your web site is collecting contact information such as name and email address for e-newsletter sign ups.
- **Copy Profile** will make a duplicate of the profile. This is a handy way to get started with a new profile. Just rename it after you get it duplicated.

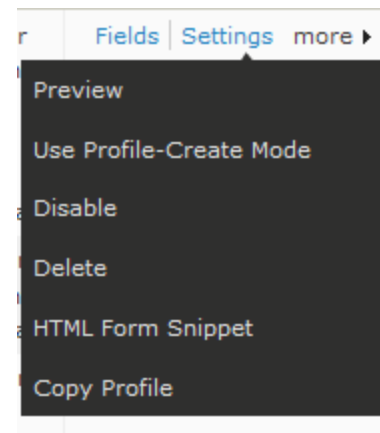


Figure 3 The more menu

## Preparing for a Profile

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Online profiles have some unique features that allow you to control such things as

- who gets informed when a profile is used,
- what data can appear in a list if you chose to display contacts in your database,
- what group should hold new contacts as they are entered,
- whether to update contact records or to add them as duplicates.

# Preparing a Profile Form for Online Event Registration Signup, Contributions or to Collect Email addresses

We recommend creating a group *beforehand* that will hold the new entries that come into your database through the external site. You can do this with the **Contacts>New Group** menu option.

We also recommend that you add new contacts, even if they are duplicates. This prevents someone from overwriting existing data. The implication of these choices is that you will have to regularly monitor the entries that come in through the web site. This is easy if you have them being added to a group. We recommend that you move them out of that group once you've done your due diligence to make sure the data is accurate and conforms to your data protocols.

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***Tip:** Pay attention to where your profiles are being used. They can be hard to track once they are put on a public page. The best practice is to copy, rather than change, an existing profile. This prevents you from accidentally breaking another site. Conversely, when a profile is no longer in use, Disable it so that it's clearly not available. Disabling also allows you to re-enable it if you find you've removed the wrong profile.*

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# Preparing a Profile Form for Online Event Registration Signup, Contributions or to Collect Email addresses

## Profile Settings

me » CiviCRM » Administer CiviCRM » Profiles

### Profile Settings - E-Newsletter Sign-up

The screenshot shows the 'Profile Settings - E-Newsletter Sign-up' page. At the top, there are 'Save' and 'Cancel' buttons. Below them is a 'View or Edit Fields for this Profile' button. The 'Profile Name' field is set to 'E-Newsletter Sign-up'. The 'Used For' section has four checkboxes: 'Standalone Form or Directory' (checked), 'Search Views', 'Drupal User Registration', and 'View/Edit Drupal User Account'. The 'Order' field is set to '11'. There are two 'Pre-form Help' and 'Post-form Help' sections, each with a rich text editor toolbar and a text area. The 'Pre-form Help' text area contains the text 'SIGN UP TO RECEIVE E-ALERTS HERE'. At the bottom, there is a checkbox 'Is this CiviCRM Profile active?' which is checked. A blue bar at the very bottom contains a link to 'Advanced Settings'.

Figure 4 Profile Settings - Basic Settings

The Profile Settings is the first page you come to when adding a profile. It contains critical information about the profile and it allows you to add some instructional text with web formatting.

**Profile Name:** Select this text thoughtfully. It will be the heading above the fields on your external page.

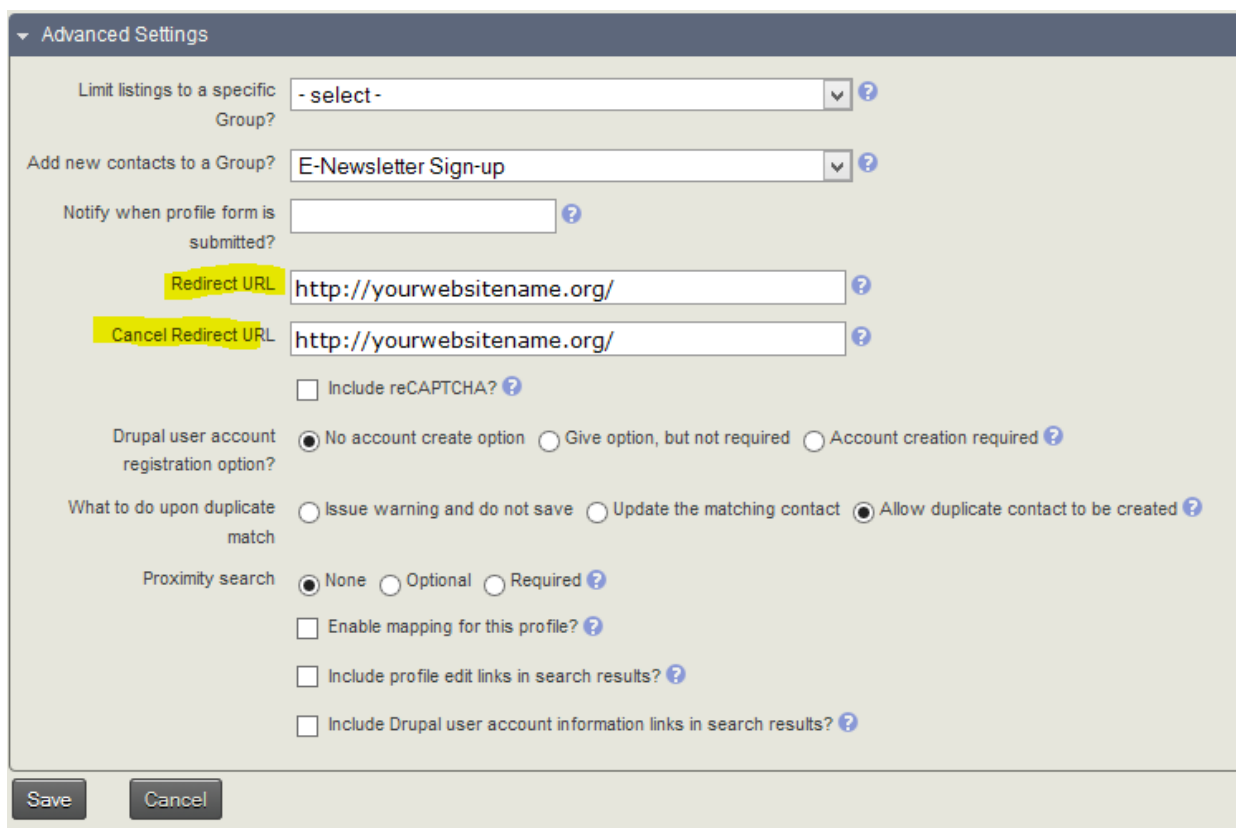
*Note the tiny question mark with a circle around it. Click on that to get specific instructions for the section you are in.*

# Preparing a Profile Form for Online Event Registration Signup, Contributions or to Collect Email addresses

**Pre-form Help:** What you enter here will appear above your profile fields on the external page. You can adjust the fonts and add images to it.

**Post-form Help:** What you enter here will appear below your profile fields on the external page. You can adjust the fonts and add images to it as well.

You have to click the triangle next to **Advanced Settings** to open up this dialog section:



The screenshot shows the 'Advanced Settings' dialog box with the following fields and options:

- Limit listings to a specific Group?** - select -
- Add new contacts to a Group?** E-Newsletter Sign-up
- Notify when profile form is submitted?** (empty text field)
- Redirect URL** http://yourwebsitename.org/
- Cancel Redirect URL** http://yourwebsitename.org/
- 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?

Buttons: Save, Cancel

Figure 5 Profile Settings - Advanced Settings

Advanced Settings is the place where some crucial settings are made.

**Limit listings to a specific group?** In almost all cases you do not select a group. This is designed for publishing member lists and isn't often required.

**Add new contacts to a Group?** We recommend always adding new contacts that come from the web side of the world to a group. It helps you keep track of what's coming into your database.

# Preparing a Profile Form for Online Event Registration Signup, Contributions or to Collect Email addresses

**Notify when profile form is submitted?** Enter the email address(es) of people that should find out if the form has been used to create a contact. Depending on how your work is organized, this may not be necessary, but some groups do use it.

**Redirect URL** This is the web site address that the user will go to after completing the form. Typically it's the home page of your web site.

**Cancel Redirect URL** This is the web site address that the user will go to if they cancel out of entering the data. Typically it's the home page of your web site.

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*A URL is the entire web address including the **http://** or **https://** portion. Failing to include the **http** section will cause a weird error to occur after a form is submitted.*

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**Include reCAPTCHA?** This tool is a free service that helps prevent automated abuse of your site. To use it, you get a license from Google <https://www.google.com/recaptcha>. Then you enter your keys into your PowerBase set up. Go to **Administer>Administration Console**. In the **System Settings** Group, you'll find the ReCAPTCHA set up link.

**Drupal user account registration option?** Always select **No account create option**.

**What to do upon duplicate match** We recommend selecting **Allow duplicate contact to be created**

**Proximity search** Select **None**

**Enable mapping for this profile?** Leave unchecked

**Include profile edit links in search results?** Leave unchecked

**Include Drupal user account information links in search results?** Leave unchecked

Once you've completed the settings, press **Save** and you'll go on to add fields to your profile.

# Preparing a Profile Form for Online Event Registration Signup, Contributions or to Collect Email addresses

## Adding Fields in a Profile

### E-Newsletter Sign Up - CiviCRM Profile Fields

The screenshot shows the 'Add Field' form in CiviCRM. At the top, there are three buttons: 'Save', 'Save and New', and 'Cancel'. Below these, the 'Field Name' dropdown is set to '- select -'. A note below it says 'Select the type of CiviCRM record and the field you want to include in this Profile.' The 'Field Label' is an empty text box. 'Required?' and 'View Only?' are unchecked checkboxes. 'Visibility \*' is set to 'User and User Admin Only'. There are two large text areas for 'Field Pre Help' and 'Field Post Help'. 'Order \*' is set to '1' and 'Active?' is checked. At the bottom, there are three buttons: 'Save', 'Save and New', and 'Cancel'.

Figure 6 Add a Field Page

You can get to this page by selecting the fields option next to a profile name. If adding a new profile, you'll automatically get to this page.

**Field Name** is where you pick the fields that you will put on your profile. You are given a choice of tables to work with. Once you select a table, you will get a list of fields. Contact table contains the fields that are common to Individuals and Organizations. Individuals and its contact subtypes contain information that applies to people. Organization and its contact subtypes contain organization information. For an e-newsletter, we'll be collecting name and email address so we'll show the screens involved.

The screenshot shows the 'Field Name' dropdown menu open. The dropdown is titled 'Field Name' and contains a list of tables: Individual, Media Contact, Funder Contact, Elected Official, Household, Organization, Media Outlet, PB Hosted Org, Activity, Participants, Contributions, Membership, and Formatting. The 'Individual' option is highlighted in blue. The background shows the 'Add Field' form with the 'Field Name' dropdown set to '- select -'.

Figure 7 Tables available



# Preparing a Profile Form for Online Event Registration Signup, Contributions or to Collect Email addresses

**Add Field**

Save Save and New Cancel

Field Name Individual First Name  
Select the type of CiviCRM record and the field you want to include in this Profile.

Field Label First Name

Required?

View Only?

Visibility \* User and User Admin Only

Field Pre Help

Field Post Help

Order \* 1

Active?

Save Save and New Cancel

Select **Individual**, then select **First Name**.

The **Field Label** will be loaded automatically but you can edit it afterwards.

**Required?** Select this check box to ensure that the user fills out this field.

**View Only?** Leave unchecked.

**Visibility** Leave at **User and User Admin Only**

**Field Pre Help** Use as needed. You can use html for this.

**Field Post Help** Use as needed. You can use html for this.

**Order** This controls where this field appears on the list of fields

**Active?** Identifies about whether this field name is active or not.

Repeat this process for last name. Now we'll look at entering the email address.

# Preparing a Profile Form for Online Event Registration Signup, Contributions or to Collect Email addresses

## E-Newsletter Sign Up - CiviCRM Profile Fields

Field Name: Contacts | Email | Web

Select the type of CiviCRM record and the field you want to include in this Profile.

Field Label: Email (Web)

Required?

View Only?

Visibility \*: User and User Admin Only

Field Pre Help

Field Post Help

Order \*: 1

Active?

To enter email address and street addresses, select the Contacts table then select the field. Fields like email, phone and address have a **Location type** associated with them. We recommend to not use Primary as the Location type since it actually is an *attribute* of Location type but isn't actually a Location type. If you use Primary, it generally will make the entry of the type Home. This can result in the good data being overwritten by questionable if not downright bad data. We recommend making a location type of "Web" or some such so that you know the information came in from your web site.

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*You can create new Location types by going to **Administer>Administration Console**. Look in the **Customize Data and Screens** section for » **Location Types (Home, Work...)***

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## Using Your Profile

Once you've built your profile, you can use for data entry in Events Online Registration or the Include Profiles of a Contribution Page. The "html Snippet" can be inserted in your web page by someone with permission to access and change your web site.