

Forms Guide

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Forms-2017

Contents



- Forms** 5
- Online Forms: Process Overview 6
- Create Forms 7
- New Form 8
- Design Forms 9
- Form Types 11
- Form Designer Style Sheets 11
- Form Sections and Steps 11
- Form Elements 13
- Form Elements Table 13
- Attribute Elements 14
- Biographical Fields 14
 - Profile Update Form 14
 - Email Signup Form 15
- Communication Preferences 16
- Contact Information 17
- Education 19
- Form Elements 20
- User Login Element 20
- Primary Employment 21
- Relationships 21
- Properties 22
 - Form Tab Properties 23
 - Step Properties 23
 - Element Tab Properties 23
- Communication Preferences Form: Advanced Properties 23
- Profile Update Form: Addresses Advanced Properties 25
- Profile Update Form: Education Advanced Properties 27
- Profile Update Form: Email Addresses and Phones Advanced Properties 28
- Profile Update Form: Name Format Types 29
- Profile Update Form: Primary Address and Business Primary Address Advanced Properties 31
- Profile Update Form: Relationships Advanced Properties 32
 - Employment 33

Organizations	33
Spouse	34
Property Descriptions	35
Form Permission Task Groups	35
Form Part	36

Forms

Online Forms: Process Overview	6
Create Forms	7
New Form	8
Design Forms	9
Form Types	11
Form Designer Style Sheets	11
Form Sections and Steps	11
Form Elements	13
Form Elements Table	13
Attribute Elements	14
Biographical Fields	14
Communication Preferences	16
Contact Information	17
Education	19
Form Elements	20
User Login Element	20
Primary Employment	21
Relationships	21
Properties	22
Form Tab Properties	23
Step Properties	23
Element Tab Properties	23
Communication Preferences Form: Advanced Properties	23
Profile Update Form: Addresses Advanced Properties	25
Profile Update Form: Education Advanced Properties	27
Profile Update Form: Email Addresses and Phones Advanced Properties	28
Profile Update Form: Name Format Types	29
Profile Update Form: Primary Address and Business Primary Address Advanced Properties	31
Profile Update Form: Relationships Advanced Properties	32

Property Descriptions	35
Form Permission Task Groups	35
Form Part	36

With *Forms*, you can create and manage online forms to collect information from website users. When you create a form, you use the form designer to create distinct steps and sections, insert instructional text, and insert fields to collect data from website users. For each form type, you add elements to the form that are specific for the type of information you want to collect from users. For example, for a Profile Update Form, you add elements to provide a way for users to add, edit, and remove profile information.

When you create a form, you also use the form designer to add elements to the form. On a web page, elements become the fields that collect data from users. Elements accept different types of data. For example, website users can enter text. They can also select from a list, a checkbox, or options.

After you design the form, create a Form part and add the part to a web page. For more information, see [Form Part on page 36](#).

Online Forms: Process Overview

To create an online form, you must perform several steps in different areas of the program.

Assign Security Rights

To allow users to create and manage online forms, you must provide security rights. You add the desired rights to a task group. In *Security assignments*, you then associate the task group with a role or individual user. In the task group, you can provide users with full supervisor rights, rights to create forms but not edit or delete other forms, view-only rights, or limited view-only rights. For information about security rights and system roles, see the *Users & Security Guide*.

When you host multiple sites, you can create forms for individual sites. To do this, log in to the site and create the form. For more information, see the *Administration Guide*.

Create Form Design

To create an online form, select **Site explorer, Forms**. Click **New Form**. On the screen that appears, you enter the name for the form. If you do not want to create a form, you can copy it. For information about how to create a form, see [Create Forms on page 7](#).

Design, Preview, and Save

To design an online form, add elements to the form that the field's website users see and complete. To add elements, drag and drop them to the design area. You can organize elements into sections within steps. To edit element properties, select the element and edit its values under **Properties**. After you design the form, preview and save it. For information about how to design, preview, and save a form, see [Design Forms on page 9](#).

Create Form part

To add the form to a web page, create a Form part in *Parts*. For information about how to create a Form part, see [Form Part on page 36](#).

Test

To test the form to make sure it is accurate and easy to use, view it in a web browser.

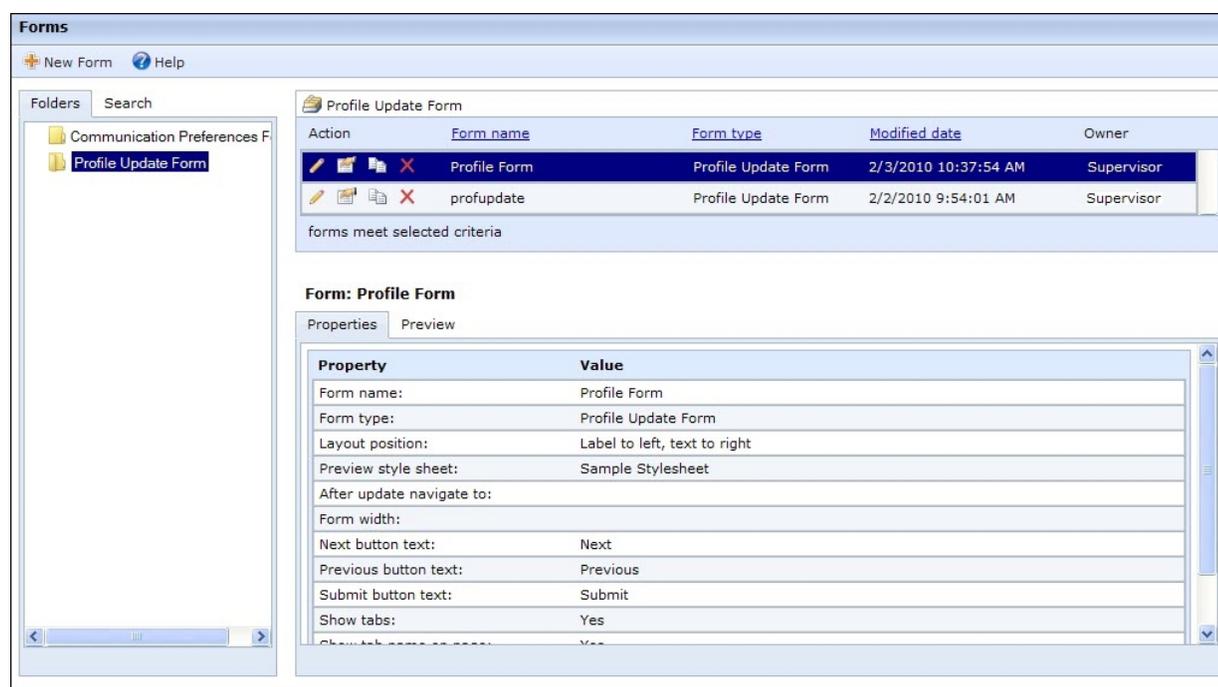
Manage Form

Manage the form after you create and design it. You can copy a form, edit it, or view its configuration.

Create Forms

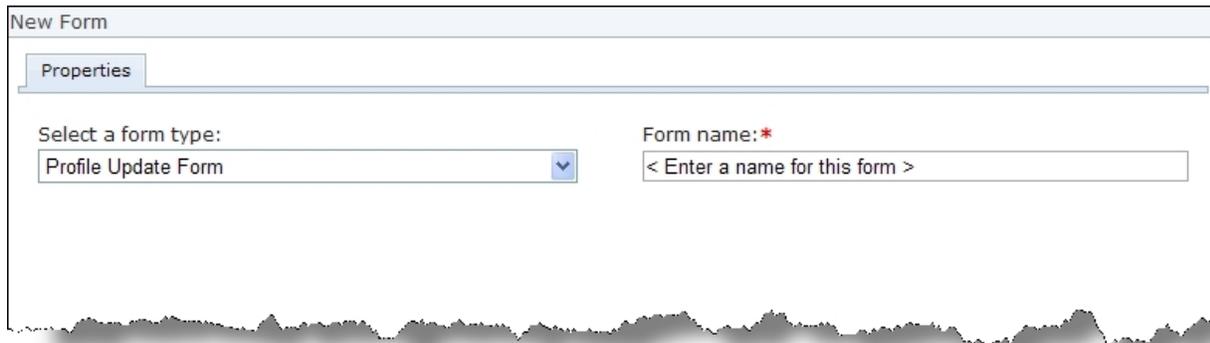
In *Forms*, you can create, search, preview, and view form details. When you design a form, the program assigns identifiers at various stages:

- When you create the form, the program assigns a form ID.
- When the form is linked to an event, the program assigns an event ID.
- When you add the Form part to a web page, the program assigns a page ID.
- When you add the page to a website, the program assigns a website ID.



➤ Create a form

1. From *Site explorer*, click **Forms**. *Forms* appears.
2. On the Folders tab, select the folder to store the form in.
3. Click **New Form**. The New Form screen appears.



4. In the **Select a form type** field, select the form type to determine the elements that are available on the form. For information about elements, see [Form Elements on page 13](#).
5. In the **Form name** field, enter a name to identify the form. You can use this name later to search for, or to select, the form.

Note: If you edit the name after you create the form, the program creates a new form.

6. Click **Save**. The form designer pane appears. The form's name appears in the form designer pane's title bar and on the first tab in the center workspace.

> Copy a form

1. From *Site explorer*, click **Forms**. *Forms* appears.
2. On the Folders tab, select the folder for the form type you want to copy. Forms in this folder appear on the right.
3. Select the form you want to copy.
4. Under **Action**, click the copy icon. The Copy Form screen appears.

Note: When you copy a form, the new form saves to the same folder the original form appears in.

5. In the **New Form Name** field, enter a name for the new form.
6. Click **Save**. You return to *Forms*. The new form appears on the right.

New Form

Use New Form to create online forms. After you click **New form** in the Forms page, the New Form screen appears. On this screen, you select the form type and enter a name. After you save the form, the Form Designer appears. To return to the Forms page, click **Return**. For information about the Form Designer, see [Design Forms on page 9](#).

Design Forms

After you save a form, add elements to the form. Elements are the fields website users see on the form. Elements accept different types of data. For example, website users can enter text. They can also select from a list, a checkbox, or options. You organize forms by sections and steps and add elements to sections. By default, each new form contains one step and one section. All forms must contain at least one section in a step. For information about form types, see [Form Types on page 11](#). For information about form elements, see [Form Elements on page 13](#).

Name	Value
(Name)	Birth date
CSS class	
Editable	Yes
Input field width	
InvalidFormat	The format is invalid. Ple...
Label	Birth date
Privacy Caption	Make private
Privacy Enabled	No
Required	No
Required text	{Label} is required.

Add Fields

The element groups that are available under **Form elements** depend on the form type. When you select an element group, the elements you can add to a form appear. Required element groups and elements appear in bold. Additionally, when you select an element group or element, a description appears under **Property Description**. For information about element groups and elements, see [Form Elements on page 13](#). For information about element properties, see [Element Tab Properties on page 23](#).

Design and action buttons

The buttons on the form designer pane allow you to organize a form into sections and steps, preview it, and save the form. For previews, the form uses the style sheet associated with the form. When you place it on a web page, it inherits the page's style sheet. If the web page is part of a website, the form

inherits the website's style sheet. Use the form designer pane to add form elements for website users to complete. These appear as fields on the form. You drag and drop elements from **Form Elements** to the design area. You can organize the form into steps that contain sections, and then add elements to sections. For information about form sections and steps, see [Form Sections and Steps on page 11](#).

Properties

When you select an element in the design area, its properties appear under **Properties**. The Form tab within **Properties** displays properties for the form. The Element tab displays properties for an element group, element, grouped element, step, or section. For information about Form Elements, see [Form Elements on page 13](#).

Under **Properties**, a description appears for an element or its properties. When you create a form, the form designer pane automatically contains one step and one section. By default, the step name is the form name and the section has no title. You can add as many steps and sections as necessary. Steps allow you to organize a form in the order you want it completed. You place form elements in a section and these become the fields website users view and complete. You can change the order of sections, steps, and elements. After you design a form, you create a Form part to add the part to a web page. For information about the Form part, see [Form Part on page 36](#).

After a website user submits a form, a message appears to inform the user the form has been successfully submitted.

➤ Design a form

1. From *Site explorer*, click **Forms**. *Forms* appears.
2. On the Folders tab, select the folder that contains the form type you want to design. Forms appear on the right.
3. Select the form and click the edit icon. The Form Designer appears.
4. Under **Add fields**, click an element group to view its elements. To hide elements, click the element group again.
5. Drag and drop elements to the design area (the center pane). When you do this, a horizontal line appears in the design area to indicate the placement of an element.
 - Required elements are in bold. You cannot save a form until you include required elements.
 - When you add an element to the design area that can only be added once, it disables. If you need to use the element someplace else on the form, you can delete it from the design area to make it available again under **Add fields**.
 - After you add an element to the design area, a double arrow icon appears if the form requires another element or the element conflicts with an existing element. For example, when you have only one element on a form, the icon appears because forms require multiple elements. Likewise, if you include the **Addresses** and **Primary address** elements on a Profile Update Form, the icon appears because you cannot use both elements on the form.
6. You can organize the form into sections and steps to manage the elements you add to the form. For more information, see [Form Sections and Steps on page 11](#).
7. Edit properties as necessary. For more information, see [Properties on page 22](#).
8. Click **Save**. The design saves.

9. To preview the form, click **Preview**. A preview screen appears for you to view and test the design.

Form Types

You can create different online form types for the data you want to collect from website users. For more information about form types and the elements each contain, see [Form Elements Table on page 13](#).

Communication Preferences

Use this form so registered website users can select the types of mail and email communications they want to receive. You also use this form to provide a way for these users to opt out of communication from your organization.

Email Signup

Use this form so registered and non-registered website users can sign up for different email newsletters and communications.

Profile Update

This form displays a user's profile and provides a way for users to add, edit, and remove profile data, such as biographical, education, and relationship information.

Select a form type when you create a form. For information about how to create a form, see [Create Forms on page 7](#).

Form Designer Style Sheets

By default, forms inherit the styles defined in *style sheets*. Styles determine the appearance of text for steps, sections, and button labels. Forms use the form default style sheet when you preview one in *Forms*. When you insert the Form part on a web page, the form inherits the styles defined for the web page or website.

For information about style sheets, see the *Website Design Guide*.

Form Sections and Steps

Use sections and steps to organize elements you add to the Form Designer. When you create a new form, it automatically includes one step, and the step contains one section. Each form requires at least one step, and each step requires at least one section. By default, the new form name is the step name, and the section has no title. In the Form Designer, steps appear as tabs and sections appear within tabs. Each section has a title area. You drop elements below this area. When you drag an element from **Add fields** to the design area, a horizontal line displays to indicate the placement for the element. You can place elements anywhere on a section.

When you add a step to a form, the default step name is Step 1. The step number increases as you add more steps. You can change a step name when you add the step or by updating the properties after you add the step. When you add a section to a step, you can enter a section name. You can change the

name by updating the properties after you add the section. Sections allow you to group elements you add to a form. This is useful if the form contains many elements. For information about properties, see [Properties on page 22](#).

You can organize steps and sections in the order you want website users to complete the form. When you have two or more steps on a form, click a step to see if you can move it to the left or right. You can move a section anywhere on a step with drag and drop. You can also click **Reorder sections** to change the order.

> Add a section to a step

1. In the Form Designer, click **Add section**. The Add section screen appears. Each section you add to a form appears below the previous section.
2. In the **Label** field, enter a label for the section.
3. Click **Save**. You return to the Form Designer and the new section appears.

To change the label, click the section. Under **Properties**, select the Element tab. In the **Label** row, enter the text you want to appear for the section name.

Note: To delete a section, click the "X" on the right edge of the section. A message appears to confirm you want to delete it. Click **Yes**. If there is only one section in the step, you cannot delete it because you must have one section in each step. After you delete a section, you cannot recover it.

> Add a step

1. In the Form Designer, click **Add step**. The Add step screen appears.
2. In the **Label** field, enter a label for the step.
3. Click **Save**. You return to the Form Designer and the new step appears.

To change the label, click the step. Under **Properties**, select the Element tab. In the **Step name** row, enter the text you want to appear for the step name.

> Reorder a step

Reorder steps when you have two or more steps on a form. Arrows appear next to the step name so you can move the step to the left or right.

1. In the Form Designer, click the step you want to reorder.
2. Click the arrow on the step in the direction you want to move it. You can also drag and drop a step to change the order.

> Reorder a section

You can reorder a section within a step. You must have at least two sections in a step to reorder it.

1. In the Form Designer, drag and drop the section to a new position. A horizontal line appears to indicate the placement of the section.
2. You can also click **Reorder sections** to change the order of a section. The Reorder sections screen appears. Drag and drop the section to a new position.

3. Click **Save**. You return to the Form Designer and the section appears in its new position.

Form Elements

Form elements in the Form Designer appear in element groups. Element groups appear under **Add fields**. Element groups contain elements that become one or more fields on a web page. For example, the first name element appears as a single field on a web page. The address element appears as multiple fields on a web page to collect all address information.

Tip: Required elements are bold. Element groups that contain one or more required elements are also bold.

To view elements for an element group, select the group under **Form elements**. The groups and elements depend on the form type. For example, you do not see communication preference element groups when the form type is Profile Update Form. When you hover over an element group or element, a short description appears in a help window.

Form elements also contain attribute elements. You create attributes in Blackbaud CRM. To view attribute elements in *Forms*, you need to include them in *Administration*. For more information, see the *Administration Guide*.

Form Elements Table

Each form type contains elements that are applicable to the form. For example, the Profile Update form contains biographical and spouse elements. Elements become fields on a web page for users to view and complete. Review the following for information about each form type and the elements for each type.

Element	Communication Preferences	Email Signup	Profile Update
Attributes			X
Biographical fields		X	X
Communication preferences	X	X	
Contact information			X
Education			X
Form	X	X	
Login information			X
Primary employment			X
Relationships			X

Review each element section for details about the elements that become fields on a web page.

Attribute Elements

You can include attribute elements on most forms. They are custom fields you add to a form. For example, you can include the **Constituent Attributes** element on the Profile Update Form to obtain t-shirt size information for constituents. Existing attributes integrate from Blackbaud CRM.

Note: If you know an attribute exists, but do not see it in *Forms*, check the Settings tab in *Sites & settings* to verify the attribute is available. For more information, see the *Administration Guide*.

When you create the Profile Update Form and **Allow only one per record** is selected for the attribute category in Blackbaud CRM, the attribute appears as a drop-down field on the web page so users can select only one option. When this is not selected, each attribute appears with a checkbox beside it so users can select multiple options.

Biographical Fields

Profile Update Form

Use **Biographical fields** on the Profile Update form. This data integrates with a constituent record.

Note: Use the Profile Update form so website users can add, edit, and remove profile information. For information about how to create a form, see [Create Forms on page 7](#). To display a form on a web page, you must include it on a Form part. For information about how to create this part, see [Design Form part on page 36](#).

Element	Record Type	Record Field/Outcome
Birth date	Individual Constituent	Personal tab, Personal information grid, Edit action, Birth date field
Do not email	Individual Constituent	Communications under More information , Preferences tab, Solicit codes grid
First name	Individual Constituent	Personal tab, Personal information grid, Edit action, First name field
Gender	Individual Constituent	Personal tab, Personal information grid, Edit action, Gender field
Interest	Individual Constituent	Personal tab, Interests grid, Edit action, Type field

Element	Record Type	Record Field/Outcome
Last name	Individual Constituent	Personal tab, Personal information grid, Edit action, Last name field
Maiden name	Individual Constituent	Personal tab, Personal information grid, Edit action, Maiden name field
Marital status	Individual Constituent	Personal tab, Personal information grid, Edit action, Marital status field
Middle name	Individual Constituent	Personal tab, Personal information grid, Edit action, Middle name field
Name format types	Individual Constituent	Names tab, Name formats grid, Type , Name , and Format fields For advanced properties information about this element, see Profile Update Form: Name Format Types on page 29 .
Nickname	Individual Constituent	Personal tab, Personal information grid, Edit action, Nickname field
Suffix	Individual Constituent	Personal tab, Personal information grid, Edit action, Suffix field
Suffix 2	Individual Constituent	Personal tab, Personal information grid, Edit action, Suffix 2 field
Title	Individual Constituent	Personal tab, Personal information grid, Edit action, Title field
Website	Individual Constituent	Personal tab, Personal information grid, Edit action, Website field
Profile image	Individual Constituent	Personal tab, Personal information grid, Edit action, Image field

Email Signup Form

The Email Signup Form uses the **Email** element under **Biographical fields**.

Note: Use the Email Signup so website users can sign up for or opt out of different email newsletters and communications. For information about how to create a form, see [Create Forms on page 7](#). To display a form on a web page, you must include it on a Form part. For information about how to create this part, see [Design Form part on page 36](#).

Element	Record Type	Record Field/Outcome
Email	Individual Constituent	Contact tab, Edit action, Email address field

Communication Preferences

Use **Communication Preferences** fields on the Communication Preferences form.

Note: Use the Communications Preferences form so registered website users can select the types of mail and email communications they want to receive. You also use this form to provide a way for these users to opt out of communication from your organization. For information about how to create a form, see [Create Forms on page 7](#). To display a form on a web page, you must include it on a Form part. For information about how to create this part, see [Design Form part on page 36](#).

Element	Record Type	Record Field/Outcome
Appeals	Individual Constituent	<p>Communications under More information, Preferences tab, Mail preferences grid</p> <p><i>Note:</i> You can use this element multiple times on one form to create separate sections for multiple sites. When you do this, you cannot add the same appeal option for the same category, site, and business unit. For example, you cannot add the Events category twice for Site A.</p> <p>The Email Signup form also uses this element.</p>
Consent solicit codes	Individual Constituent	<p>Communications under More information, Preferences tab, Solicit codes grid</p> <p><i>Note:</i> Use this element to provide the ability for users to explicitly opt-in or opt-out of receiving communication from your organization on specific communication channels.</p>
eOptions	Individual Constituent	<p>Includes preferences for newsletters, notifications, and chapter lists. Notifications and chapter lists do not appear in Blackbaud CRM. Newsletters: Communications under More information, Newsletters tab</p>
Events	Individual Constituent	<p>Communications under More information, Preferences tab, Mail preferences grid</p> <p><i>Note:</i> You can use this element multiple times on one form to create separate sections for multiple sites. When you do this, you cannot add the same event for the same site more than once. For example, you cannot add the Walk-a-Thon event twice for Site A.</p>
General correspondence	Individual Constituent	<p>Communications under More information, Preferences tab, Mail preferences grid</p> <p><i>Note:</i> Only active addresses appear on the form.</p>

Element	Record Type	Record Field/Outcome
Email Opt-out	Individual Constituent	Communications under More information , Preferences tab, Solicit codes grid <i>Note:</i> Use this required element to provide the ability for users to opt out of email communication from your organization.
Receipts	Individual Constituent	Communications under More information , Preferences tab, Mail preferences grid
Reminders	Individual Constituent	Communications under More information , Preferences tab, Mail preferences grid
Acknowledgements	Individual Constituent	Communications under More information , Preferences tab, Mail preferences grid
Privacy policy	Individual Constituent	Communications under More information , Preferences tab, Solicit codes grid <i>Note:</i> Use this element to provide the ability for users to review your organization's privacy policy from the Communication Preferences form.
Solicit codes	Individual Constituent	Communications under More information , Preferences tab, Solicit codes grid

Use the Communication Preferences form to target these elements for registered website users. Use the Email Signup form to target the **Appeals** element for registered users, non-registered website users, or both. On either form, the data defaults directly on the constituent record in Blackbaud CRM when a constituent submits a communication preference on your website. When a non-registered user submits a communication preference on the Email Signup form, the data defaults on the Email subscribers page in *Users & security*. For more information, see the *Email Guide*.

Note: To view a list of constituents and their preferences, create a query in Blackbaud CRM. For more information, see the *Blackbaud CRM Query & Export Guide*.

For advanced properties information about these elements, see [Communication Preferences Form: Advanced Properties on page 23](#).

Contact Information

Use **Contact information** fields on the Profile Update form. This data integrates with a constituent record.

Note: Use the Profile Update form so website users can add, edit, and remove profile information. For information about how to create a form, see [Create Forms on page 7](#). To display a form on a web page, you must include it on a Form part. For information about how to create this part, see [Design Form part on page 36](#).

Element	Record Type	Record Field/Outcome
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Addresses	Individual Constituent
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	Contact tab, Edit action, Address fields
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Note: The **Addresses** element includes the ability to select an address as the primary address. Therefore, when you use this element, you cannot use the **Primary address** element.

An **Inactive** button appears beside each non-primary address. When a user clicks this and submits the profile update, a transaction processes to update the constituent record. On the Contact tab, the transaction date defaults in the **End date** field and **Do not mail to this address** is selected. Also, the **Type** field updates to the address type you select in the **Former address type** field when you configure integration with Blackbaud CRM.

For advanced properties information about this element, see [Profile Update Form: Addresses Advanced Properties on page 25](#).

Element	Record Type	Record Field/Outcome
Email addresses	Individual Constituent	<p>Contact tab, Edit action, Email address field</p> <p>A Delete button appears beside each non-primary email address. When a user clicks this and submits the profile update, the contact information removes from the profile and a transaction processes to update the constituent record. On the Contact tab, the transaction date defaults in the End date field and Do not send email to this address is selected. Also, "(Former)" appears beside the email so you know it is inactive.</p> <p><i>Note:</i> Use this element to include the Make my primary email address private checkbox on the web page. To enable the checkbox so users can select whether to mark the primary email address as private, select "Yes" in the Privacy enabled row on the Properties pane. When website users select this, it also designates their primary email address as private for the Directory and Profile Display parts on a web page.</p> <p>For advanced properties information about this element, see Profile Update Form: Email Addresses and Phones Advanced Properties on page 28.</p>
Phones	Individual Constituent	<p>Contact tab, Edit action, Address fields</p> <p>A Delete button appears beside each non-primary email address. When a user clicks this and submits the profile update, the contact information removes from the profile and a transaction processes to update the constituent record. On the Contact tab, the transaction date defaults in the End date field and Do not call this phone number is selected. Also, "(Former)" appears beside the number so you know it is inactive.</p> <p><i>Note:</i> Use this element so users can enter multiple phone numbers and select a primary phone type. When a user submits one new phone number and the linked constituent record in Blackbaud CRM does not have phone number data, the number automatically becomes the primary phone number for the user after it downloads to Blackbaud CRM. For advanced properties information about this element, see Profile Update Form: Email Addresses and Phones Advanced Properties on page 28</p>
Primary address	Individual Constituent	<p>Contact tab, Edit action, Address fields</p> <p><i>Note:</i> The Addresses element includes the ability to select an address as the primary address. Therefore, you cannot use this element when you use the Addresses element.</p> <p>For advanced properties information about this element, see Profile Update Form: Primary Address and Business Primary Address Advanced Properties on page 31.</p>

Education

Use the fields under **Education** on the Profile Update form. This data integrates with a constituent record.

Note: Use the Profile Update form so website users can add, edit, and remove profile information. For information about how to create a form, see [Create Forms on page 7](#). To display a form on a web page, you must include it on a Form part. For information about how to create this part, see [Design Form part on page 36](#).

Element	Record Type	Record Field/Outcome
Educational histories	Individual Constituent	Education tab, Edit action, Education grid Use this element so users can add or edit education history information, such as Primary education information or Graduation date . <i>Note:</i> Users only have rights to view education history information that affiliates with your organization. For example, when a user's education history includes an affiliated education institution from Blackbaud CRM, he can view the information on the form, but he cannot change it. For more information about affiliated education institutions, see the Blackbaud CRM <i>Administration Guide</i> .
Educational involvements	Individual Constituent	Education tab, Edit action, Involvement grid Use this element so users can add or edit education involvement information, such as College/School or Department .

For advanced properties information about these elements, see [Profile Update Form: Education Advanced Properties on page 27](#).

Form Elements

Use **Form elements** to add static text to a form.

Element Function

HTML Element	Add text anywhere on a form. When you edit the element, an editor appears to add and format the text. If you create a link to a site, include the full URL.
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User Login Element

Use the **Login information** element on the Profile Update form so users can edit login credentials for your site.

Note: Use the Profile Update form so website users can add, edit, and remove profile information. For information about how to create a form, see [Create Forms on page 7](#). To display a form on a web page, you must include it on a Form part. For information about how to create this part, see [Design Form part on page 36](#).

Element Function

Login update Adds the **Login Name**, **Login Password**, **Login Confirmation Password**, and **Login Reminder Phrase** fields to the form so users can edit login credentials.

Note: You can disable the **Login Name** field so users cannot change their user name. Under **Properties** on the Element tab, locate the **Login name editable** row. Select No.

Warning: This element does not provide the ability to log in to your site.

Primary Employment

Use **Primary employment** fields on the Profile Update form. This data integrates with a constituent record.

Note: Use the Profile Update form so website users can add, edit, and remove profile information. For information about how to create a form, see [Create Forms on page 7](#). To display a form on a web page, you must include it on a Form part. For information about how to create this part, see [Design Form part on page 36](#).

Element	Record Type	Record Field/Outcome
Business address	Individual Constituent	Contact tab, Edit action, Address fields
Industry	Individual Constituent	Organization tab, Organization details grid, Edit action, Industry field
Organization name	Individual Constituent	Organization tab, Organization details grid, Edit action, Name field <i>Note:</i> When a website user submits Organization position data, this field is required.
Organization position	Individual Constituent	Relationships tab, Edit action, Job title field

Tip: The **Primary employment** element includes the ability to select a primary employer. Therefore, when you use this element, you cannot use the Organization element under **Relationships**.

For information about advanced properties for this element, see [Profile Update Form: Primary Address and Business Primary Address Advanced Properties on page 31](#).

Relationships

Use **Relationships** fields on the Profile Update form. This data integrates with a constituent record.

Note: Use the Profile Update form so website users can add, edit, and remove profile information. For information about how to create a form, see [Create Forms on page 7](#). To display a form on a web page, you must include it on a Form part. For information about how to create this part, see [Design Form part on page 36](#).

Element	Record Type	Record Field/Outcome
Employment	Individual Constituent	<p>Relationships tab, Edit action, Edit relationship screen</p> <p>An Inactive button appears beside each relationship. When a user clicks this and submits the profile update, a transaction processes to update the constituent record. On the Relationships tab, the transaction date defaults in the End date field.</p> <p><i>Note:</i> The Employment element includes the ability to select a current employer. Therefore, when you use this element, you cannot use the Primary Employment element under Contact information.</p>
Organizations	Individual Constituent	<p>Relationships tab, Edit action, Edit relationship screen</p> <p>An Inactive button appears beside each relationship. When a user clicks this and submits the profile update, a transaction processes to update the constituent record. On the Relationships tab, the transaction date defaults in the End date field.</p> <p><i>Note:</i> Use this element so users can specify relationships with organizations such as volunteer or board member.</p>
Spouse	Individual Constituent	<p>Relationships tab, Edit action, Edit relationship screen</p> <p>Users can add, edit, and remove spouse information. When a user removes a spouse and submits the profile update, a transaction processes to update the constituent record. On the Relationships tab, the type updates to the relationship type you select in the Removed spouse relationship type field when you configure integration with Blackbaud CRM.</p> <p>Enter the text you want to appear for the remove button in the Remove spouse label row in the Properties pane.</p>

For advanced properties information about these elements, see [Profile Update Form: Relationships Advanced Properties on page 32](#).

Properties

Use properties to view and change form and element properties. You change properties on the Form tab and you can change element properties on the Element tab. When you select a form or element property, a description appears in the box at the bottom of the **Properties** pane.

- You can show or hide the **Properties** pane. To do this, click the button on the right of the pane.
- You can resize the **Properties** pane. To do this, place the cursor to the left of the pane on the vertical line. Drag the line to resize it. To resize the **Name** and **Value** columns on the **Properties** pane, place the cursor on the vertical line in between the columns. Drag the line to resize it.
- When elements contain many properties, a scroll bar appears so you can scroll them to view all properties.

Form Tab Properties

The Form tab in the **Properties** pane displays properties for the form. You can change any form property except **Form type**. Once you create a form, you cannot change its type.

You change a form property in the **Value** column. Some properties require you to enter text. Other properties open a screen for you to enter text or select options.

Step Properties

The Step tab in the **Properties** pane on forms displays properties for the step selected in the design area. From the **Value** column, you can enter text for the **Label** property to appear as the step name.

Element Tab Properties

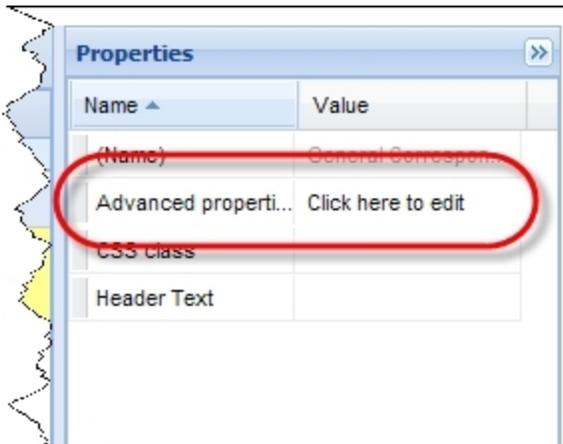
The Element tab in the **Properties** pane displays properties for the element selected in the design area. It also displays properties for sections. Each element shares common properties, such as **(Name)** and **CSS class**. You can change any of the properties except for the ones that appear in parentheses and are disabled, such as **(Name)** and **(Mode)**.

The Form Designer provides great flexibility so you can create the exact form you want. You change element properties in the **Value** column. Some elements require you enter text. Other properties open a screen for you to enter text or select options. Element properties may vary for different elements, but many have common elements. For example, all elements have a name and a **CSS class** property.

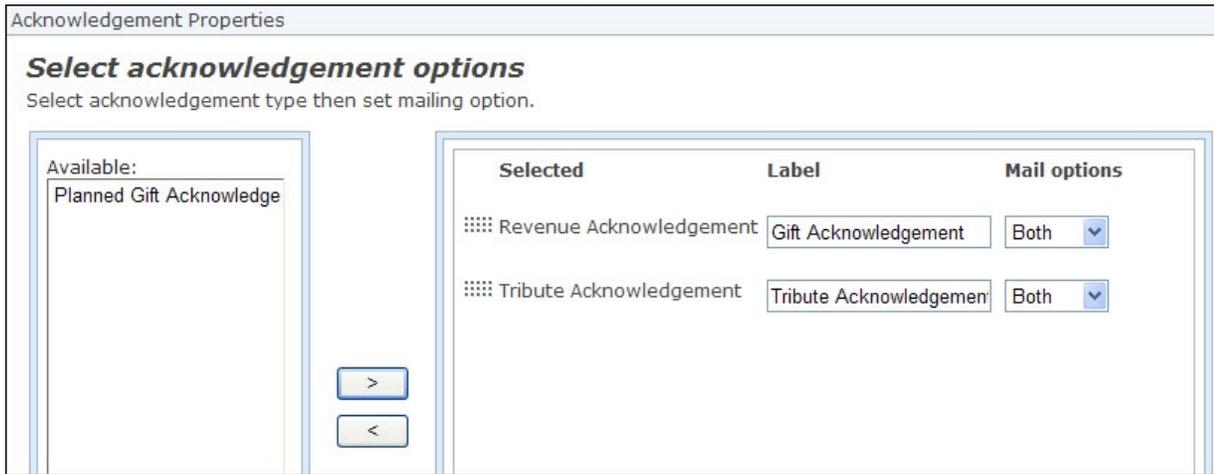
Note: If you have administrator rights and the program automatically logs you out due to inactivity, changes you save for advanced properties remain when you log in again. To view your changes, exit *Forms* and return to the advanced properties page.

Communication Preferences Form: Advanced Properties

When you select an element under **Communication Preferences** for a Communication Preferences Form, you can select advanced properties for the element. To view advanced property options, find **Advanced properties** in the **Properties** pane. In the **Value** column, select **Click here to edit**.



The Properties screen appears. The options on this screen are similar but vary depending on the data that applies to each element. For example, most elements, such as General Correspondence, Events, and Acknowledgements include the ability to select specific codes or types on the web page. The Reminders element does not include this because codes and types do not apply to reminders. All elements include the ability to enter text for the communication as you want it to appear on the web page. You can also select the mail options for each element such as send by mail or email.



When you select **Advanced properties** for the Appeals element, the Appeal Preferences Properties screen appears.

Appeal Preference Properties

Create appeal options

Select the site, business unit, and categories to include. Enter the text as you want it to appear on the web page and select the mailing option.

Category:

Site:

Business unit:

Mail options:

Selected appeal options

Action	Category	Site	Business unit	Mail options
Text				
<input type="checkbox"/> X	Annual			Both
<input type="checkbox"/> X	Membership	A Site	Special Events	Email

Under **Create appeal options**, filter the appeals to appear on your form based on category, site, or business unit and select how users can receive appeals. For users who receive an appeal by email, email messages are based on a template that is associated with the appeal and that uses "Appeal" as the data source. For more information about email templates and data sources, see the *Email Guide*.

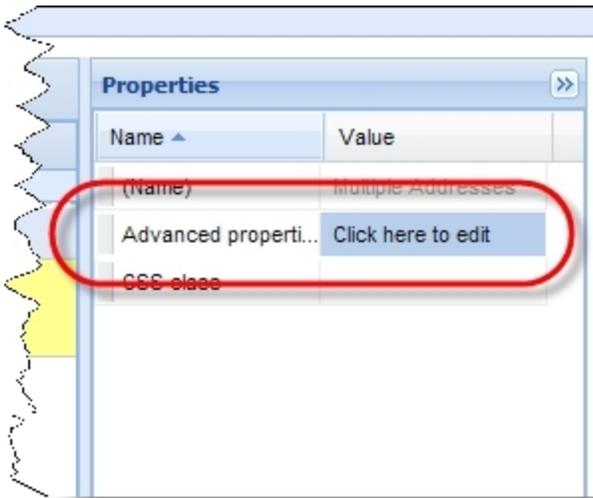
Tip: In the **Properties** pane, enter custom text for headers and columns for a communication preference form. For example, to update the opt in and communication columns, locate the **Opt in text** and **Communication text** rows. In the **Value** column, enter the text to appear for the columns. To update the header, locate the **Header text** row. In the **Value** column, enter the text to appear for the header.

For more information about the communication preferences element, see [Communication Preferences on page 16](#).

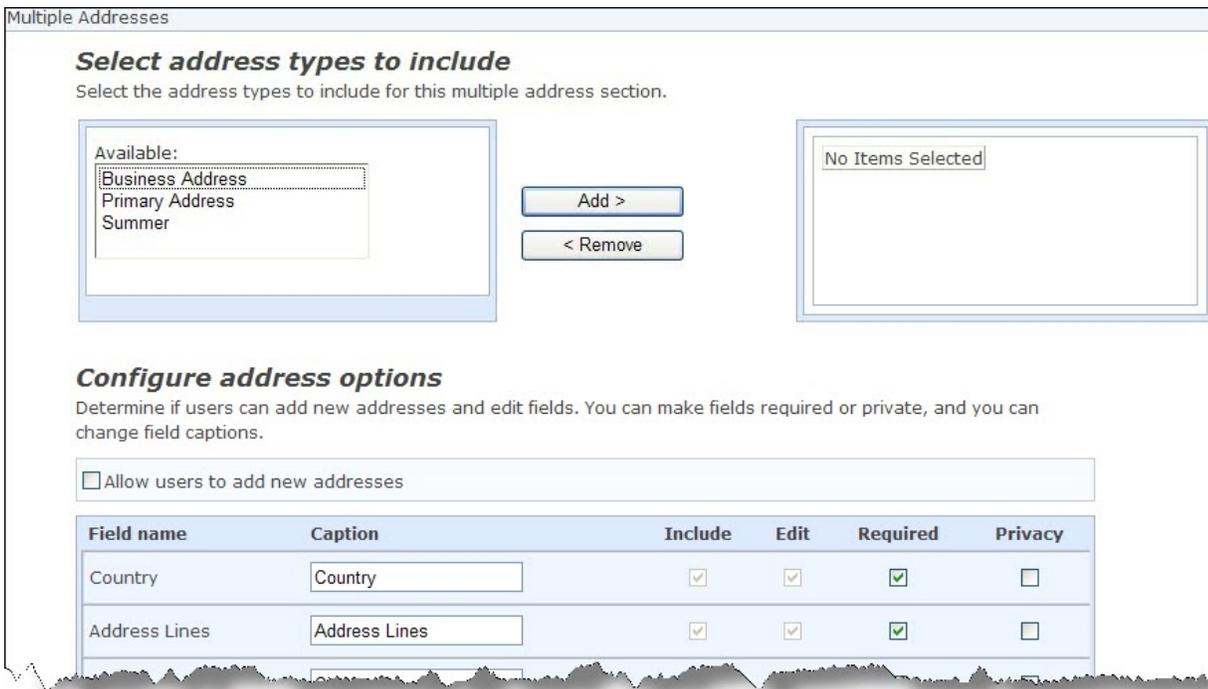
Profile Update Form: Addresses Advanced Properties

When you select the **Addresses** element under **Contact information** for a Profile Update Form, you can select advanced properties for the element. Use advanced properties to select whether users can add or edit an address from profiles.

To view advanced property options for addresses, find **Advanced properties** in the **Properties** pane. In the **Value** column, select **Click here to edit**.



The Multiple Addresses screen appears.



On this screen, select the address types to include on the form. For example, to allow users to update business and primary address information, move "Business Address" and "Primary Address" to the box on the right. To customize how these appear on your web page, enter the text as you want it to appear in the **Caption** column that appears in the box on the right.

Multiple Addresses

Select address types to include
Select the address types to include for this multiple address section.

Available:
Summer

Add >

< Remove

Address Type	Caption
Business Address	Business Address
Primary Address	Home Address

Configure address options
Determine if users can add new addresses and edit fields. You can make fields required or private, and you can change field captions.

Allow users to add new addresses

Field name	Caption	Include	Edit	Required	Privacy
Country	Country	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Address Lines	Address Lines	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

You can also select to allow users to add new addresses and specify the address information to include on the page. Also, you can enter the text as you want it to appear on the web page for each address field you include, you can select whether the field is required, and you can allow users to edit or hide the field.

Profile Update Form: Education Advanced Properties

When you select an element under **Education**, you can select advanced properties for the element. Use advanced properties to select the education information that appears for profiles.

Note: For more information about the education elements, see [Education on page 19](#).

Properties >>

Form **Element**

Name	Value
(Name)	Educational histories
Advanced properties	Click here to edit
CSS class	
Required text	The following required fi...

The Multiple Educational Properties screen appears.

Multiple Educational History Properties

Configure educational history options
Determine if users can add new educational histories and edit fields. You can make fields required and you can change field captions.

Allow users to add new educational histories

Display in summary	Field name	Caption	Include	Edit	Required	Privacy
<input checked="" type="checkbox"/>	Educational Institution	Educational Institution	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	Primary education information	Primary education info	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/>	Status	Status	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

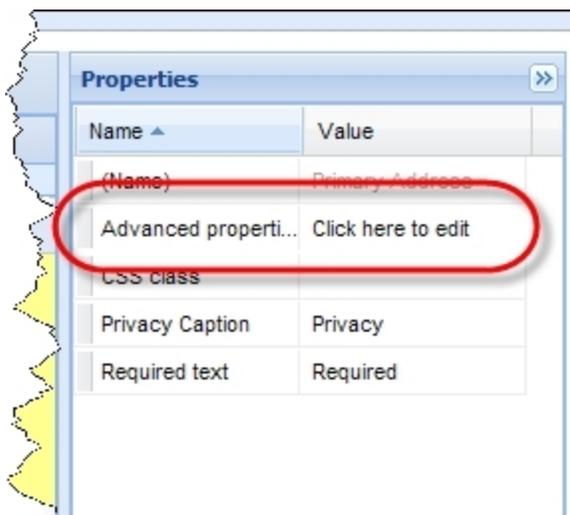
On this screen, you can select to allow users to add new education history or involvements. When you select **Display in summary**, the field appears in a grid for a user to view when the form displays on a web page. When you select **Include**, a user can add or edit information for the field. If you clear **Edit** and select **Include**, the field is disabled when a user adds or edits information for this element. Also, you can enter the text as you want it to appear on the web page for each field, you can select whether the field is required, and you can allow users to hide the field.

Profile Update Form: Email Addresses and Phones Advanced Properties

When you select **Email addresses** and **Phones** under **Contact information**, you can select advanced properties for the element. Use advanced properties to select the email and phone types to make available online.

Note: When you use these elements, users can enter multiple email addresses and phone numbers. They can also select a primary email address type and a primary phone type. For more information about these elements, see [Contact Information on page 17](#).

To view advanced property options, find **Advanced properties** in the **Properties** pane. In the **Value** column, select **Click here to edit**.



The Select types to include screen appears.

Select email types to include
Select the email types to include.

Available:		Email Type	Caption
Secondary Email	Add >	Primary Email	Primary Email
	< Remove		

On this screen, select the types to include on the web page and enter the text as you want it to appear on the web page for each type you include.

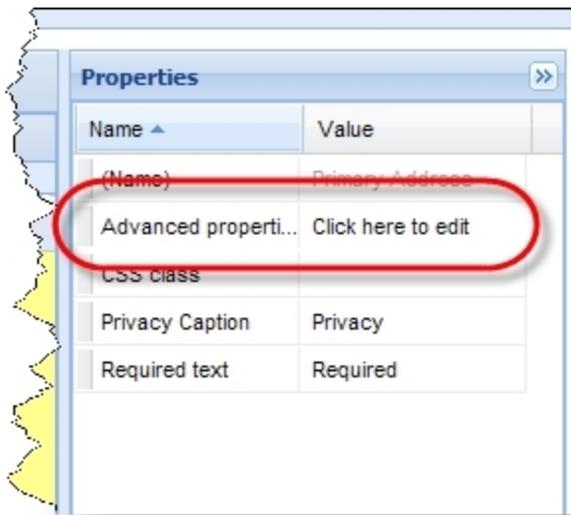
Note: If you know a type exists in Blackbaud CRM but do not see it on this part, check the Settings tab in *Sites & settings* to make sure the type is available. If the type is available in *Sites & settings*, but does not appear as an option, close your browser and clear the browser cache.

Profile Update Form: Name Format Types

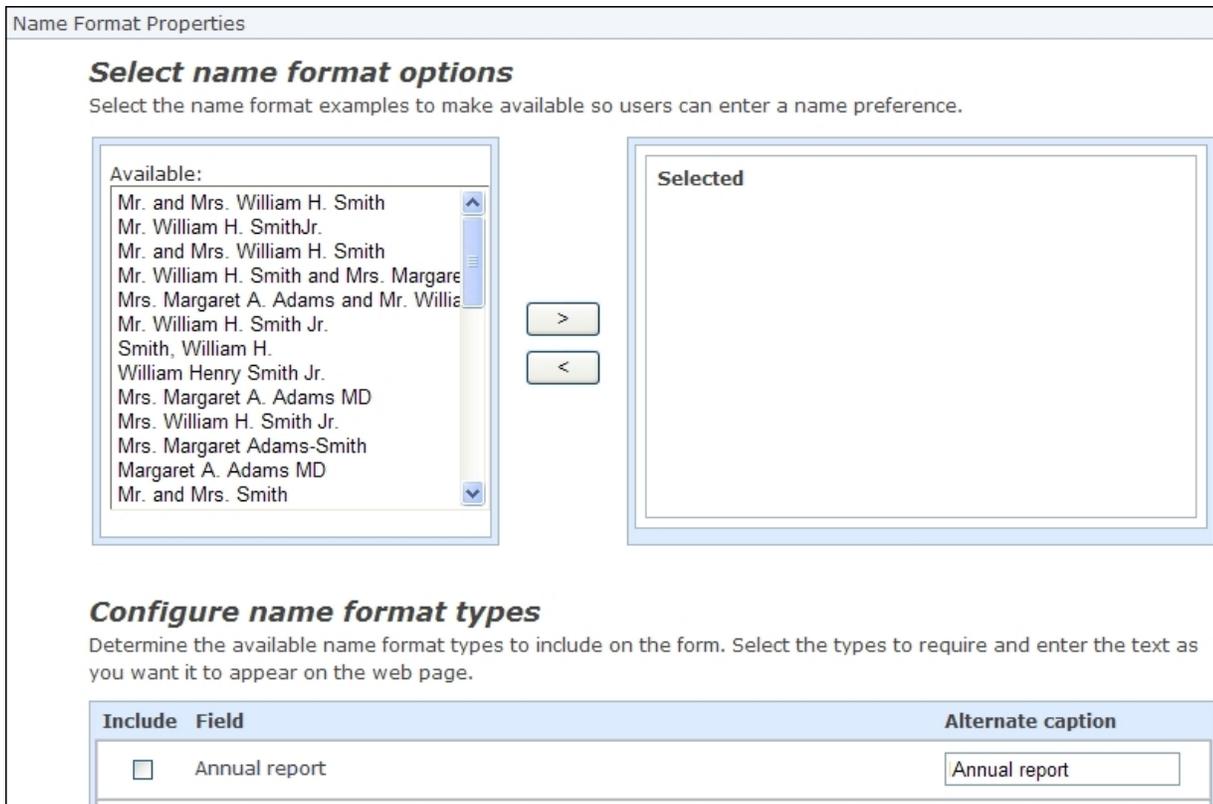
When you select **Name format types** under **Biographical fields** for a Profile Update Form, you can select advanced properties for name format options and types. Use advanced properties so users can enter multiple name recognition preferences on the profile page. For example, users can enter a preferred name for your annual report and enter a preferred name for your alumni mailings.

Note: For more information about the name format type element, see [Biographical Fields on page 14](#).

To view advanced property options, find **Advanced properties** in the **Properties** pane. In the **Value** column, select **Click here to edit**.



The Name Format Properties screen appears.



On this screen, select the name format options to include on the web page. You also select the name format types to include and enter the text for the type as you want it to appear on the web page.

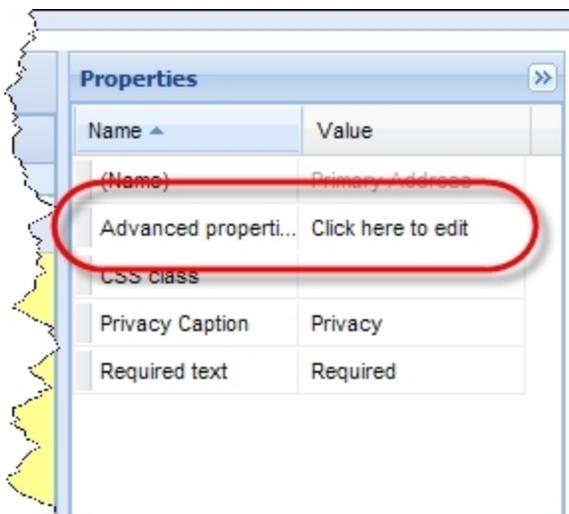
Note: If you know a name format type exists in Blackbaud CRM but do not see it on this screen, check the Settings tab in *Sites & settings* to make sure the name format type is available.

Profile Update Form: Primary Address and Business Primary Address Advanced Properties

When you select **Primary address** under **Contact information** or **Business address** under **Primary employment** for a Profile Update Form, you can select advanced properties for the element. Use advanced properties to select the address information that appears for profiles.

Note: For more information about the primary address element, see [Contact Information on page 17](#). For more information about the business address element, see [Primary Employment on page 21](#).

To view advanced property options, find **Advanced properties** in the **Properties** pane. In the **Value** column, select **Click here to edit**.



The Profile Address Advanced Properties screen appears.

Profile Address Advanced Properties

Configure address options

Determine the address information users can view and edit. You can make fields required or private, and you can change field captions.

Include	Field name	Caption	Edit	Required	Privacy
<input checked="" type="checkbox"/>	Address Line 1	<input type="text" value="Address Line 1"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/>	Address Line 2	<input type="text" value="Address Line 2"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/>	Address Line 3	<input type="text" value="Address Line 3"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/>	Address Line 4	<input type="text" value="Address Line 4"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/>	Address Line 5	<input type="text" value="Address Line 5"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/>	City	<input type="text" value="City"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	State	<input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

On this screen, select the address fields to include on the web page. You can enter the text as you want it to appear on the web page for each address field you include, you can select whether the field is required, and you can allow users to edit or hide the field.

Profile Update Form: Relationships Advanced Properties

When you select an element under **Relationships** for a Profile Update Form, you can select advanced properties for the element. Use advanced properties to select whether users can add new relationships and to select the specific fields to include on the form. You can also enter text as you want it to appear on the web page for each field you include.

To view advanced property options for relationships, find **Advanced properties** in the **Properties** pane. In the **Value** column, select **Click here to edit**.

Properties

Name	Value
(Name)	Multiple Addresses
Advanced properti...	Click here to edit
CSS class	

Employment

On the Relationships Properties screen, you can allow users to add new employment relationships. When you select **Display in summary**, the field appears in a grid for a user to view when the form displays on a web page. When you select **Include**, a user can add or edit information for the field. If you clear **Edit** and select **Include**, the field is disabled when a user adds or edits information for this element.

Relationship Properties

Configure employment relationship options
Determine if users can add new employment relationships and edit fields. You can make fields required and you can change field captions.

Allow users to add new employment relationships

Organization fields

	Display in summary	Field name	Caption	Include	Edit	Required	Privacy
⋮	<input checked="" type="checkbox"/>	Organization	Organization	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
⋮	<input type="checkbox"/>	Is Contact	Is Contact	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
⋮	<input type="checkbox"/>	Contact Type	Contact Type	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
⋮	<input type="checkbox"/>	Comments	Comments	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
⋮	<input type="checkbox"/>	Matches Gifts	Matches Gifts	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Employment fields

	Display in summary	Field name	Caption	Include	Edit	Required	Privacy
⋮	<input checked="" type="checkbox"/>	Position	Position	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
⋮	<input type="checkbox"/>	Industry	Industry	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
⋮	<input type="checkbox"/>	Career Level	Career Level	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
⋮	<input type="checkbox"/>	Category	Category	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Also, you can enter the text as you want it to appear on the web page for each field, you can select whether the field is required, and you can allow users to hide the field.

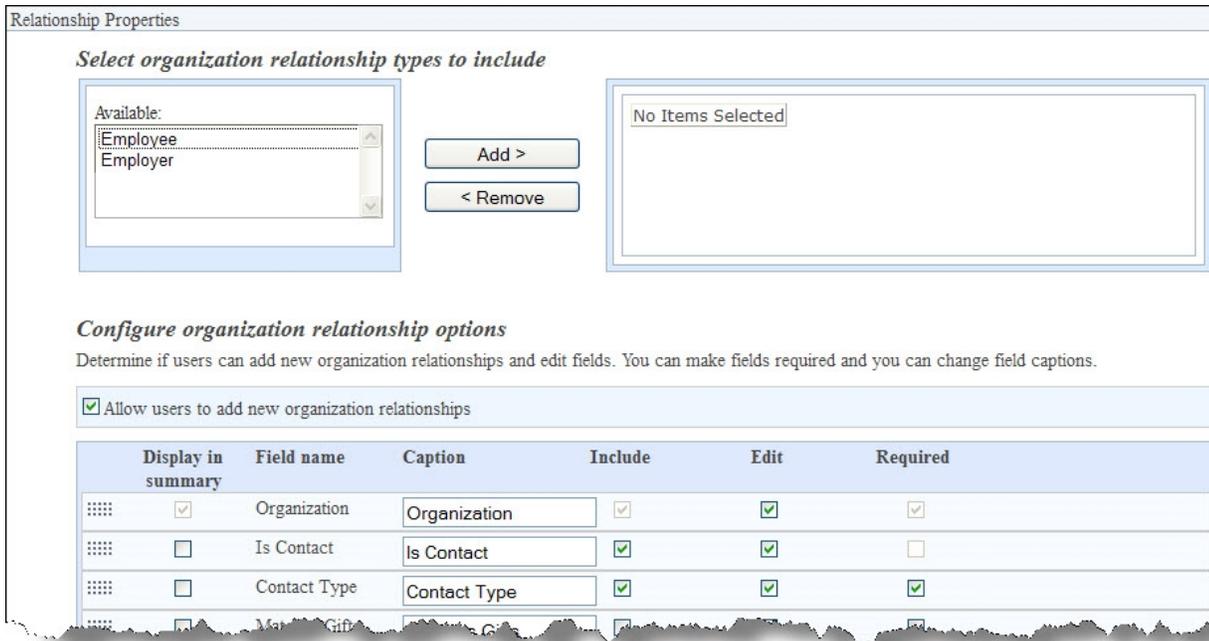
Organizations

On the Relationships Properties screen for the **Organizations** element, to filter the organization types to include on the form, select the type in the **Available** box and click **Add**. The type appears in the box on the right.

Note: The relationship type you select in the **Individual relationship type** field when you configure integration with Blackbaud CRM does not appear in the **Available** box for this element. For more information about this field, see the *Web Transactions Guide*.

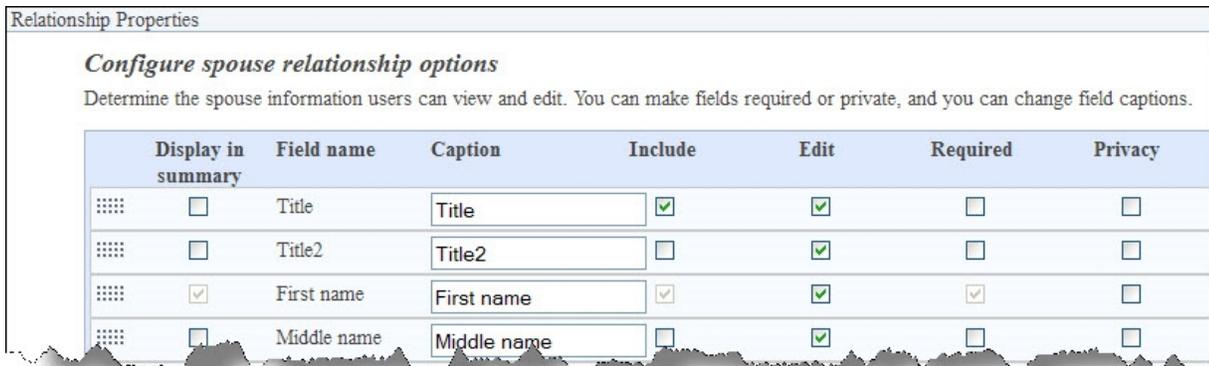
Under **Configure organization relationship options**, you can select to allow users to add new organization relationships. When you select **Display in summary**, the field appears in a grid for a user to view when the forms displays on a web page. When you select **Include**, a user can add or edit information for the field. If you clear **Edit** and select **Include**, the field is disabled when a user adds or edits information for this element. Also, you can enter the text as you want it to appear on the web

page for each field, you can select whether the field is required, and you can allow users to hide the field.



Spouse

On the Relationships Properties screen for the **Spouse** element, select the fields to include and options for the fields.



When you select **Display in summary**, the field appears in a grid for a user to view when the form displays on a web page. When you select **Include**, a user can add or edit information for the field. If you clear **Edit** and select **Include**, the field is disabled when a user adds or edits information for this element. Also, you can enter the text as you want it to appear on the web page for each field, you can select whether the field is required, and you can allow users to hide the field.

For more information about the **Relationships** elements, see [Relationships on page 21](#).

Property Descriptions

Depending on what you select in the design area, property descriptions appear on the **Properties** pane at the bottom of the page. Review the following for property description information.

- Descriptions appear for element groups. For example, **Layout elements** and **Profile elements**.
- Descriptions appear for an element. For example, **Last name** and **First name** under **Biographical fields**.
- Descriptions appear for element properties. For example, **CSS class** in the **Name** column.

The screenshot shows the Form Designer interface. On the left, a form titled 'YOUR PROFILE' is displayed. It contains several input fields: 'First name *', 'Last name *', 'Email address *', 'Birth date', 'Phone type', 'Phone number', 'Address type', 'Country *', 'Address *', 'City *', 'State *', 'ZIP *', and a checkbox for 'Do not send mail to this address' with a 'Reason' dropdown. Below this is a section for 'Register a company' with a 'Company name *' field. On the right, the 'Properties' pane is open, showing a table of properties for the selected 'Address' element.

Name	Value
CSS class	
Default value - Address...	
Default value - Country	
Input field width	
Label - Address type	Address type
Label - Country	Country
Label - Do not mail	Do not send mail to this ...
Label - Reason	Reason
Required - Address	Yes
Required - Address type	No
Required - City	Yes
Required - Country	Yes
Required - State	Yes
Required - ZIP	Yes
Required text	{Label} is required.
Visible	Yes
Visible - Address type	Yes
Visible - Country	Yes
Visible - Do not mail	No
Visible - Reason	No
Who can see this?	Everyone

Below the table, a note states: "The **Address** element is a grouped element that enables supporters to enter their contact information."

Form Permission Task Groups

When you host multiple sites, you can create forms for individual sites. To do this, log in to the site and create the form. For more information, see the *Administration Guide*.

To create a form, you must have appropriate security rights. In addition, you can assign modify, copy, or delete rights for forms. You assign task rights from *Users & security, Task groups*.

Under **Forms security, Full rights** grants rights to supervisors and form owners to create, modify, copy, and delete forms. Other users can only view and copy forms. When you copy a form, the new form saves to the same folder the original form appears in. **Create rights** grants full rights to supervisors. It also grants create, modify, and copy rights to form owners. Other users can only view and copy forms. **View rights** grants rights to preview the form. Non-supervisors cannot open the form in the Form Designer.

For more information about task rights, see the *Users & Security Guide*.

Form Part

To display a form on a web page, you must include it on a Form part. To create a Form part, go to **Site explorer, Parts**.

> Design Form part

For information about how to create or edit a part, as well as the tabs on the Edit Part screen, see the *Parts Guide*.

1. From the Design tab, for the **Form to display** field, click the binoculars to select the form to associate with the part.
2. Click **Save**. You return to *Parts*.