



CIVICRM



# Creating the Perfect Form

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# CiviCRM Profile Forms

- ✓ Enter contact info
- ✓ Custom fields
- ✓ Good for adding to CiviCRM workflows
- ✓ Not much else



# That's the basics, what about the rest?

- ✓ Multiple contacts
  - ✓ Family members, employer, household, etc.
- ✓ Conditional questions
- ✓ Multistep processes
  - ✓ Multipage forms
  - ✓ Multiple forms linked together
  - ✓ Saving drafts

# Webform + CiviCRM

- ✓ Building blocks to create the perfect form
- ✓ Power & flexibility
- ✓ Lots of extra modules to plug in
- ✓ Some assembly required

# The Perfect Form

- ✓ Don't ask for the same information twice
- ✓ Organize for the user, not for you
  - ✓ Page breaks, fieldsets, conditionals
  - ✓ Change default labels
  - ✓ Hide irrelevant options
  - ✓ Swap widgets
- ✓ Don't let them mess up your data!
  - ✓ Display “not you” message
  - ✓ Use “existing contact” options to hide fields

# What 's New In Version 4

- ✓ Contact labels
- ✓ Inline Help
- ✓ Paid Events
- ✓ Memberships
- ✓ Contributions

# Webform Add-On Modules

- ✓ Webform Layout
  - ✓ for making your webforms pretty
- ✓ Webform Conditional Fields
  - ✓ for making your webforms interactive
- ✓ Node Clone
  - ✓ so you don't have to create new forms from scratch
- ✓ Webform HTML Textarea
  - ✓ Input textfields with wysiwyg editor
- ✓ Webform Autocomplete
  - ✓ Define arbitrary autocomplete fields
- ✓ Mollom/Captcha/etc.
  - ✓ Keep spam out of your db



# Live Demo

- ✓ Layout
- ✓ Employer
- ✓ Shared Address
- ✓ Relationships
- ✓ Conditionals
- ✓ Event
- ✓ Memberships
- ✓ Contribution Amounts