

# Web Submission Forms

Last Modified on 03/07/2023 9:29 am EST

## Donor Management System

Do you need a way to collect email list opt-ins or volunteer sign ups right from your website? Take advantage of **two web forms** to collect this information and capture it directly in your DMS. Plus, customize the forms and easily embed them on your site with a quick copy/paste.

**This article will cover how you can access, customize, and embed an Email Subscription or Volunteer Sign-up form for your charity.**

### Table of Contents:

- [Accessing the Web Forms](#)
- [Customizing the Email Opt-in Form](#)
- [Customizing the Volunteer Signup Form](#)
- [Embedding Your Web Forms](#)
- [Notice of Signups](#)
- [How will Signups Show in the DMS?](#)
  - [Email Opt-In Form](#)
  - [Volunteer Signup Form](#)
- [What's Next?](#)

---

## Accessing the Web Forms

1. Visit your **administrative Settings**.
2. Under **Customize Data and Screens**, select **Website Forms**

Wellness Avenue

Dashboard Contacts Contributions Campaigns Opportunities Reports DMS Mail

Settings Help

DMSCA DMSCA

### Administer CanadaHelps DMS

Customize Data and Screens

- Website Forms
- Contact Types
- Activity Types
- Tags (Categories)

Communications

- Organization Address and Contact Info
- Print Page (PDF) Formats
- Message Templates

Localization

- Date Formats

System Settings

- Payment Processor Settings
- Import/Export Mappings
- Misc (Undelete, PDFs, Limits, Logging, etc.)
- Receipt Settings

CanadaHelps Contribute

- Manage Campaigns
- GL Accounts
- Funds
- Manage Groups

CanadaHelps Campaign Group

- Campaign Groups

DMS Mail

- Headers, Footers, and Automated Messages
- DMS Templates
- From Email Addresses
- Draft, Schedule, and Manage DMS Mails
- Mailchimp Settings

Settings > Website Forms

3. On the next page, you'll find (1) Email opt-in form and (1) Volunteer signup form that you can **customize, preview, or access an embed code for**.

Wellness Avenue

Dashboard Contacts Contributions Campaigns Opportunities Reports DMS Mail

Settings | Help

DMSCA DMSCA

### Website Forms

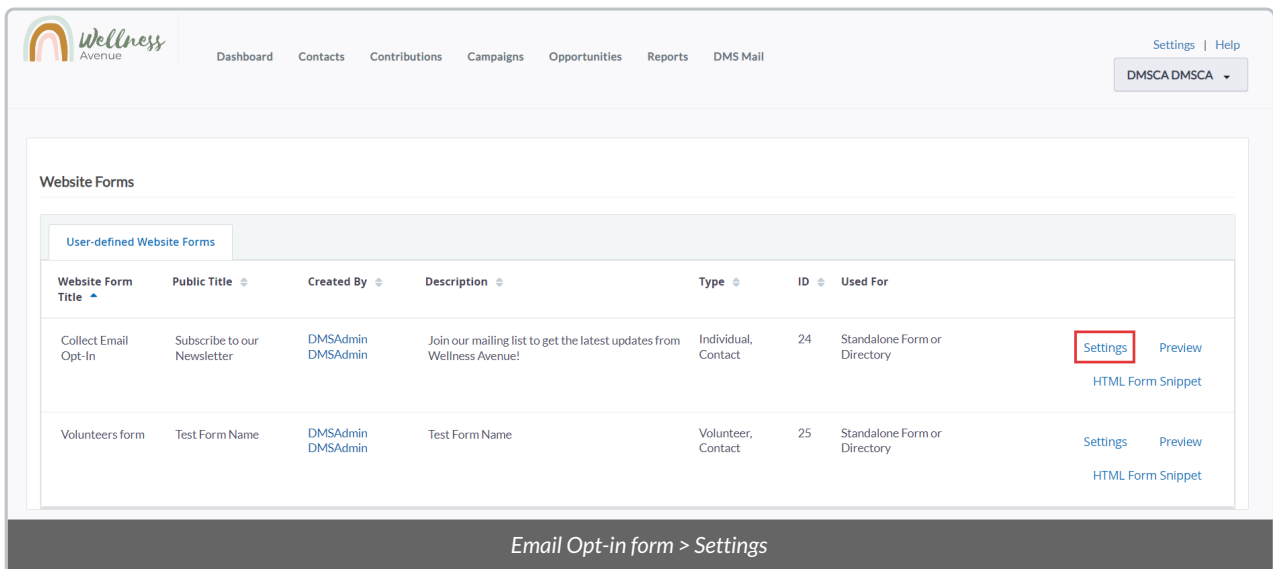
User-defined Website Forms

Website Form Title	Public Title	Created By	Description	Type	ID	Used For	
Collect Email Opt-In	Subscribe to our Newsletter	DMSAdmin DMSAdmin	Join our mailing list to get the latest updates from Wellness Avenue!	Individual, Contact	24	Standalone Form or Directory	Settings Preview HTML Form Snippet
Volunteers form	Test Form Name	DMSAdmin DMSAdmin	Test Form Name	Volunteer, Contact	25	Standalone Form or Directory	Settings Preview HTML Form Snippet

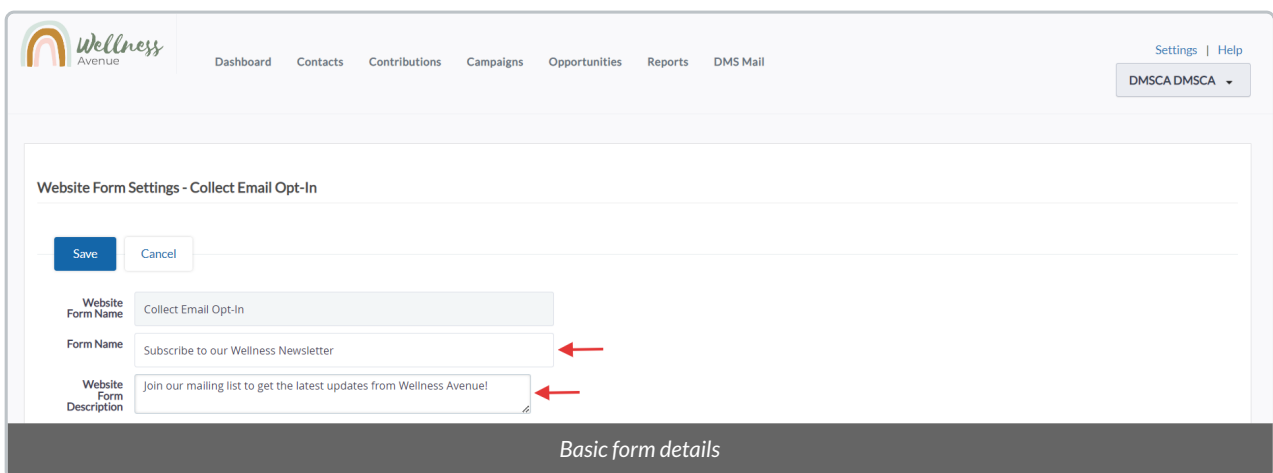
Website forms actions

# Customizing the Email Opt-in Form

1. From the main Website Forms screen, select the **Settings** option beside your Email Opt-in Form



2. On the next screen, you'll be directed to fill out some basic information about your web form.



- **Website Form Name:** this field is for internal purposes and is view only (don't worry, this name won't show anywhere publicly).
- **Form Name:** give your web form a name (Note: this name is for your internal tracking only and won't show anywhere outside the DMS).
- **Website Form Description:** provide an optional description for your web form so that you and your team can easily identify it
- **Used for:** this checkbox is also for internal purposes and is view only.

3. Just below, you can include text that will appear as the **header and footer** of your email opt-in form. Here, you can also **deactivate** your webform.

The image shows a screenshot of a website form editor interface. It features two main sections: "Form Headline" and "Form Footer". Each section has a rich text editor toolbar with options for source, undo, redo, bold, italic, underline, strikethrough, text color, background color, bulleted list, numbered list, link, unlink, quote, insert link, insert image, insert table, and insert media. Below the toolbars are style dropdown menus set to "Normal".

In the "Form Headline" section, a red arrow points to a text field containing the text: "Yes, I'd like to receive email communications, including news and program updates from Wellness Ave. I understand that I can unsubscribe at any time." Below this field is a "body p" label.

In the "Form Footer" section, there is a checkbox labeled "Is this CanadaHelps DMS Website Form active?" which is checked. Below this is another "body p" label.

At the bottom of the editor, there is a dark grey bar labeled "Header/footer".

4. Click on the **Advanced Settings** tab to reveal some more customization options:

^ **Advanced Settings**

Limit listings to a specific Group?  **a**

Add contacts to a group?  **b**

Email to receive new submissions through this form  **c**

Redirect URL  **d**

Submit Button Text\*  **e**

Include reCAPTCHA? **f**

What to do upon duplicate match  Update the matching contact **g**

Background Color  **h**

Button & Links Color

Title Bar Text

Title bar Background

Email Opt-in: Advanced Settings

**(a) Limit listings to a specific group:** this field is for internal purposes only.

**(b) Add contacts to a group?:** automatically add any individual who fills out this web form to a [\(previously created\) group](#) (e.g., New Email Subscribers, Volunteers List)

**(c) Email to receive new submissions through this form:** choose an optional email address to receive notifications about any signups through this form

**(d) Redirect URL:** after submission, redirect any individuals signing up through the webform to a webpage of your choice (otherwise, they'll remain on the same page)

**(e) Submit button text:** customize the call-to-action on the submission button

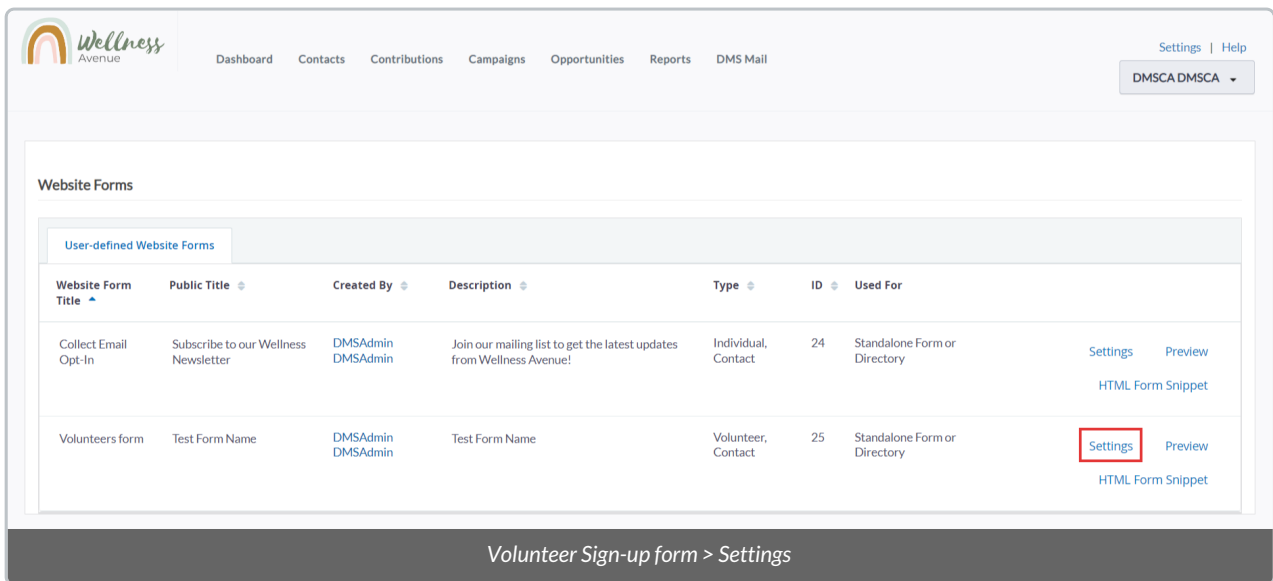
**(f) Include reCAPTCHA:** include a reCAPTCHA prompt before submission to help reduce spam and use of malicious software through your webform

**(g) What to do upon duplicate match:** decide if you'd like the DMS to automatically merge any existing Contacts that sign up through your webform (to help avoid duplicate Contact creation)

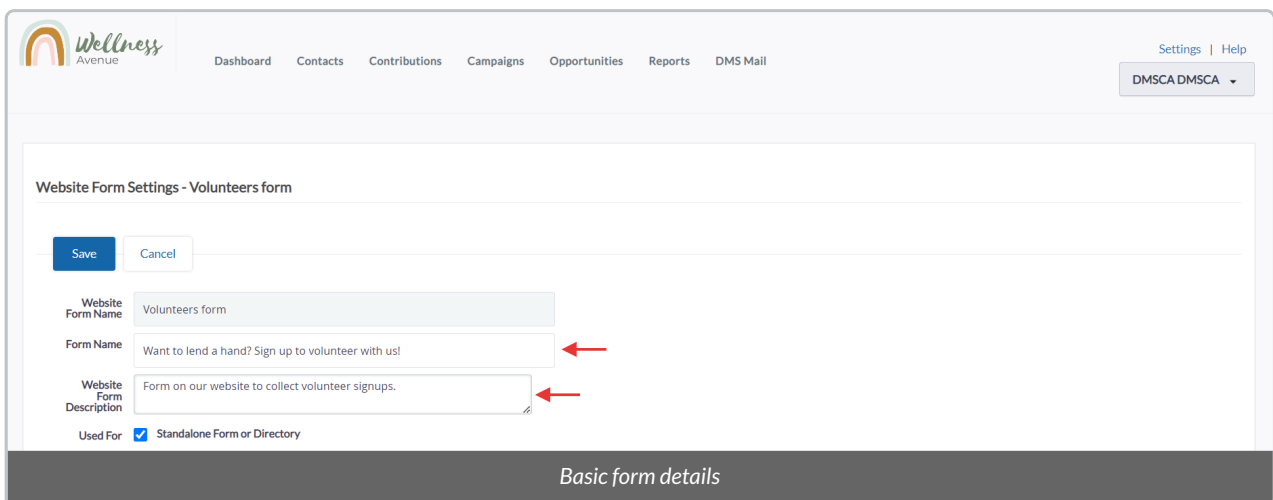
**(h) Colour picker:** customize the colours of your webform's background, submission button, title bar, and text

# Customizing the Volunteer Signup Form

1. From the main Website Forms screen, select the **Settings** option beside your Volunteer Signup Form



2. On the next screen, you'll be directed to fill out some basic information about your web form.



- **Website Form Name:** this field is for internal purposes and is view only (don't worry, this name won't show anywhere publicly).
- **Form Name:** give your web form a name (Note: this name is for your internal tracking only and won't show anywhere outside the DMS).
- **Website Form Description:** provide an optional description for your web form so that you and your team can easily identify it
- **Used for:** this checkbox is also for internal purposes and is view only.

3. Just below, you can include text that will appear as the **header and footer** of your email opt-in form. Here, you can also **deactivate** your webform.

The image shows a web editor interface for a form. It features two main sections: 'Form Headline' and 'Form Footer'. Each section has a rich text editor toolbar with options for source, undo, redo, bold, italic, underline, strikethrough, text color, background color, link, unlink, list, and table. Below the toolbars are 'Styles' and 'Format' dropdown menus. The 'Form Headline' section contains the text 'Want to lend a hand? We'd love to have you!' with a red arrow pointing to it from the left. The 'Form Footer' section is currently empty. At the bottom of the editor, there is a checkbox labeled 'Is this CanadaHelps DMS Website Form active?' which is checked. A dark grey bar at the very bottom of the interface is labeled 'Header/footer'.

4. Click on the **Advanced Settings** tab to reveal some more customization options:

(a) **Limit listings to a specific group:** this field is for internal purposes only.

(b) **Add contacts to a group?:** automatically add any individual who fills out this web form to a (previously created) group (e.g., New Email Subscribers, Volunteers List)

(c) **Email to receive new submissions through this form:** choose an optional email address to receive notifications about any signups through this form

(d) **Redirect URL:** after submission, redirect any individuals signing up through the webform to a webpage of your choice (otherwise, they'll remain on the same page)

(e) **Submit button text:** customize the call-to-action on the submission button

(f) **Include reCAPTCHA:** include a reCAPTCHA prompt before submission to help reduce spam and use of malicious software through your webform

(g) **What to do upon duplicate match:** decide if you'd like the DMS to automatically merge any existing Contacts that sign up through your webform (to help avoid duplicate Contact creation)

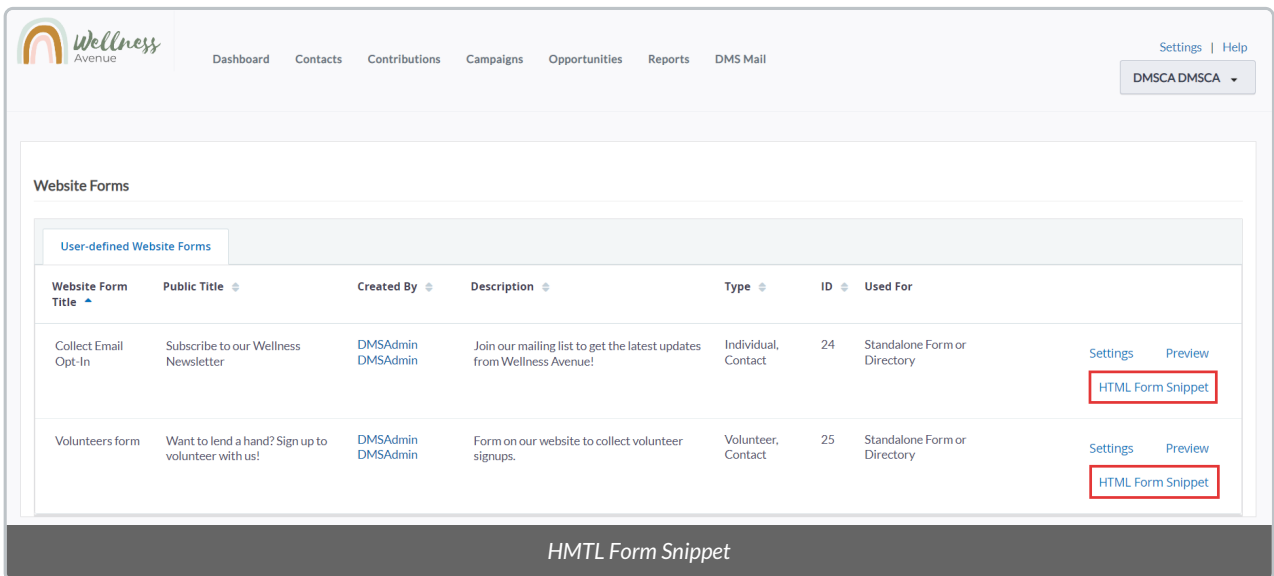
(h) **Colour picker:** customize the colours of your webform's background, submission button, title bar, and text



# Embedding Your Web Forms

Once you've finished customizing your webforms, you can easily paste them right onto any page of your website to encourage email opt-ins and volunteer signups straight from your site.

1. From the main Website Forms screen, select the **HTML Form Snippet** option beside the web form you'd like to embed.

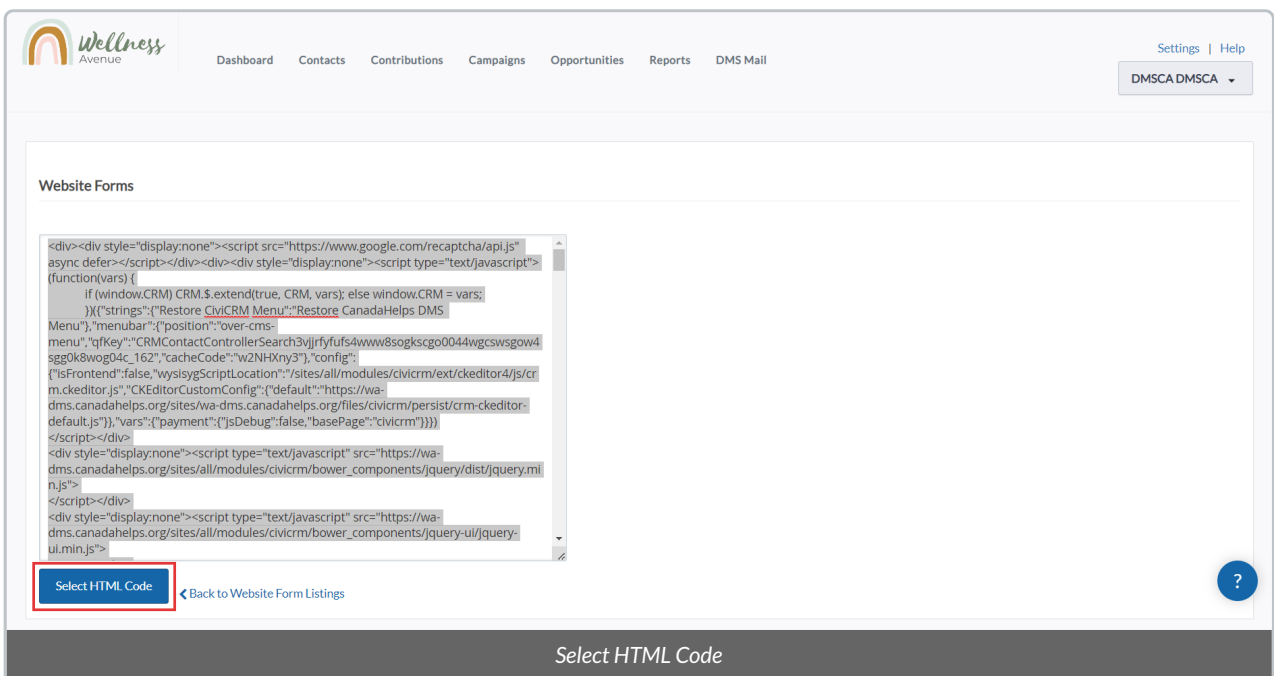


The screenshot shows the 'Website Forms' management interface. At the top, there is a navigation bar with the 'Wellness Avenue' logo and menu items: Dashboard, Contacts, Contributions, Campaigns, Opportunities, Reports, and DMS Mail. On the right, there are links for 'Settings | Help' and a dropdown menu for 'DMSCA DMSCA'. Below the navigation is a 'Website Forms' section with a sub-tab for 'User-defined Website Forms'. A table lists two forms:

Website Form Title	Public Title	Created By	Description	Type	ID	Used For	Settings	Preview
Collect Email Opt-In	Subscribe to our Wellness Newsletter	DMSAdmin DMSAdmin	Join our mailing list to get the latest updates from Wellness Avenue!	Individual, Contact	24	Standalone Form or Directory	Settings	Preview
Volunteers form	Want to lend a hand? Sign up to volunteer with us!	DMSAdmin DMSAdmin	Form on our website to collect volunteer signups.	Volunteer, Contact	25	Standalone Form or Directory	Settings	Preview

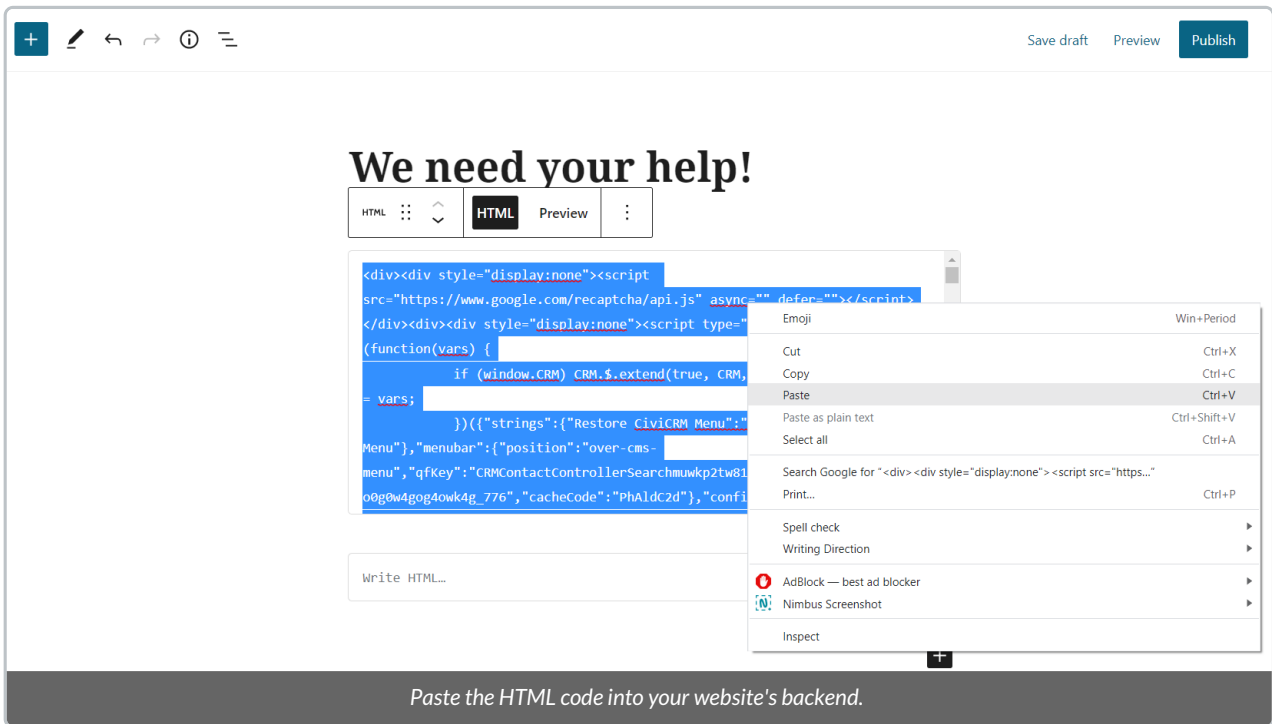
Below the table, there are two red-bordered buttons labeled 'HTML Form Snippet', one for each form. At the bottom of the interface, a dark grey bar contains the text 'HTML Form Snippet'.

2. On the next page, click **Select HTML Code** to highlight the entire code. Once highlighted, copy it to your clipboard.



The screenshot shows the 'Website Forms' management interface with the HTML code for a form displayed in a text area. The code is a complex JavaScript snippet that includes a Google reCAPTCHA API call and various jQuery and JavaScript functions for form validation and submission. At the bottom of the text area, there is a blue button labeled 'Select HTML Code' which is highlighted with a red border. Below the text area, there is a link 'Back to Website Form Listings' and a blue circular help icon with a question mark. At the bottom of the interface, a dark grey bar contains the text 'Select HTML Code'.

3. If you make changes to your charity's website yourself, simply **paste this code into the HTML file of your site** (i.e., where you go to make changes to your site).



### Don't make changes to your website yourself? No problem!

Just send this code in an email to your web designer and ask them to embed the webform into your website.

Once embedded, your web forms can look something like this:


**Email opt-in form:**

I'd like to receive email communications, including news and updates, from Wellness Ave. I understand I can unsubscribe at any time.

First Name \*

Last Name \*

Email (Primary) \*

I'm not a robot  reCAPTCHA  
Privacy - Terms

SUBSCRIBE TO OUR NEWSLETTER

Example: email opt-in webform

### Volunteer signup form:

Want to lend a hand? We'd love to have you!


First Name \*

Last Name \*

Email \*

Primary phone number \*

Tell us what inspired you to help.

I'm not a robot  reCAPTCHA  
Privacy - Terms

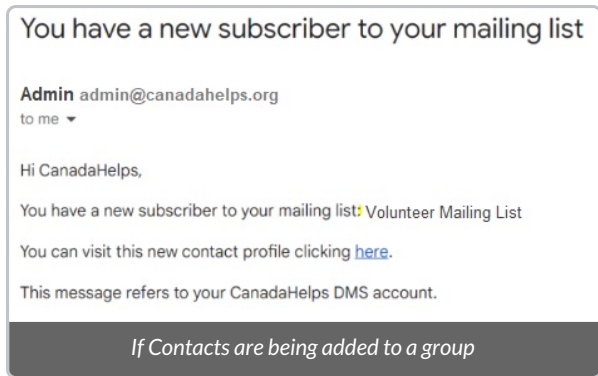
SIGN ME UP

Example: volunteer signup webform

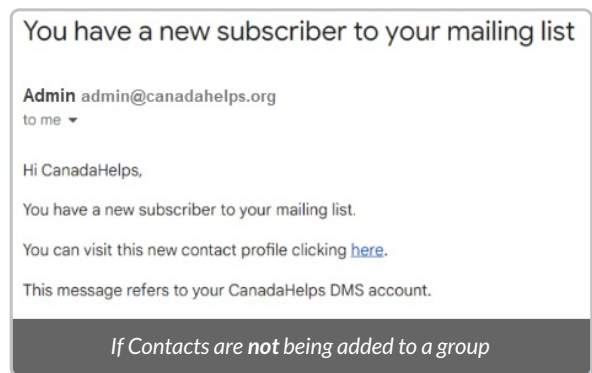
## Notice of Signups

As a reminder, when customizing either of your webforms (under *Advanced Settings*), you can set an email address to receive email notices of any new submissions through your form.

If you've also selected to **add any Contacts to a specific group** (following a submission), the notification email will tell you which mailing list (i.e., which group) has received a new signup:



Otherwise, if you've chosen **not to add any Contacts to a specific group** (following a submission), the notification email will instead just let you know of a generic new submission:



---

## How will Signups Show in the DMS?

Any time someone fills out either your Email Opt-in or your Volunteer Signup web form, this information will sync directly into your DMS under each **Contact's profile**.

### Email Opt-In Form

If someone opts-in through your webform with an email address that belongs to an **existing Contact in your DMS**, the system will automatically update that existing Contact's *Communication Preferences* to "Email Opt-in" (if this box was previously unchecked).

Similarly, if a Contact already exists in your DMS but was previously marked as "NO BULK EMAILS", the system will uncheck this preference and check "Email Opt-in" instead.

**Edit Alex Fergie**

COLLAPSE ALL TABS

▼ Contact Details

▼ Address

▲ Communication Preferences

Communication Style

Formal  Familiar

Email Greeting: Dear Alex    Postal Greeting: Dear Alex    Addressee: Alex Fergie

Privacy

Email Opt-in  
 Do not phone  
 Do not email  
 Do not mail  
 Do not sms  
 Do not trade  
 NO BULK EMAILS (User Opt Out)

Preferred Communication Method

Phone  
 Email  
 Postal Mail  
 No Solicitation  
 Website Opt-In

Preferred Language: English (Canada)

Email Format: Both

Contact Profile > Communication Preferences

In the case of a **Contact that did not previously exist in the DMS** (i.e., submission of an entirely new email address), if they fill out your Email Opt-in form, they'll be automatically added as a new Contact (Individual) in the DMS.

And, in this case, the system will also update their *Source* to "Collect Email Opt-in" so that you'll be able to pull a report through [Advanced Search](#) of all new Contacts added through this webform.

**Alex Fergie**

Actions Edit

Summary Contributions 6 Activities 29 Relationships 1 Groups 1 Notes 0 Tags 2 Opportunities

Home Address: Old Trafford, London, ON N2N3N4, Canada

Billing Address: Alex Fergie, Old Trafford, London, ON N2N3N4, Canada

Home Email: jubino+fergie@canadahelps.org  
 Work Email: fergie@gmail.com  
 Billing Email: jubino+fergie@canadahelps.org

Home Home: 5145216099

Work Website: https://www.manutd.com/

▼ Summary Fields

Total Contributions in the Last 12 Months	521.00
Amount of last contribution	10.00
Date of Last Contribution	11/28/2022 12:00AM
Date of First Contribution	07/11/2022 11:15AM
Largest Contribution	400.00
Total Lifetime Contributions	521.00
Count of Contributions	5

Tags: Cyclist, Monthly Donors

Contact Type: Individual  
 Contact ID: 2602  
 External ID:

Gender:  
 Date of Birth:  
 Age:

Employer: CanadaHelps  
 Job Title: Finance Coordinator  
 Recognition Name:  
 Source: Collect Email Opt-in

Delete Contact

Contact profile > Source

## Volunteer Signup Form

If an individual who is **not an existing Contact in the DMS** fills out your Volunteer sign up webform, they'll be

added as a new Contact in the DMS. But, unlike regular *Individual* Contacts, these will instead show as *Contact Type: Volunteer*.

And, in this case, the system will also update their *Source* to "Volunteers forms" so that you'll be able to pull a report through [Advanced Search](#) of all new Contacts added through this webform.

Mr. Andy June

Actions Edit

Summary Contributions 10 Activities 18 Relationships 0 Groups 2 Notes 0 Tags 0 Opportunities

Main Address: 1234 Test St, Test Town, ON L3R8J4, Canada

Billing Address: Andy June, 1234 Test St, Test Town, ON L3R8J4, Canada

Main Email: gabriellal+123@canadahelps.org

Billing Email: gabriellal+123@canadahelps.org

Main Home: 6472871065

Summary Fields

Total Contributions in the Last 12 Months	371.00
Amount of last contribution	300.00
Date of Last Contribution	07/29/2022 4:17PM
Date of First Contribution	06/28/2022 4:30PM
Largest Contribution	300.00
Total Lifetime Contributions	371.00
Count of Contributions	9

Tags

Contact Type	Volunteer
Contact ID	2604
External ID	

Gender

Date of Birth

Age

Employer

Job Title

Recognition Name

Source: Volunteers form

Contact profile > Contact Type + Source

**Note:** If someone fills out the Volunteer webform and they are already an existing Contact in the DMS, only their *Contact type* will be updated from *Individual* to *Volunteer* (their *Source* will remain the same).

## What's Next?

As you start to receive email opt-ins and volunteer signups, if you've decided to add these Contacts to a Group, learn how to manage them within this [specific group](#).

Or why not send all new email subscribers and/or volunteers a [customized email](#)?