



Website Forms

Forms are accessed by website admins, development associate, leadership associate, program associate and office manager.

Currently the foundation hosts 30 forms:

27 for the nine affiliates, three each (two internal one external):

- 1) External “sign up” form for the affiliate enews
- 2) Internal (accessed by the secure affiliate login) for individual updates or new contacts for the affiliate.
- 3) Internal (accessed by the secure affiliate login) for an upload file that has updated or new contact information

3 for Contact information Leadership Associate, Donor Relations and Program

- 1) Leadership and Program are getting basic contact information from specific group
- 2) Donor Relations are getting some contact information but more Donor Relations data such as Philanthropic Interests, Anonymity, Engagement Strategy

All forms are accompanied by the Notifications that allow the to receive notifications with contact updates in the email or as an attachment. Director of Information Technology is the backup for Affiliate forms. Donor Relations Associate, Program Associate and Leadership Associate will need to determine a backup for the form information and setup the Notifications accordingly. Documentation in the process should be in the departmental instructions.

Forms and notifications are checked by the Communications Director before being sent to constituents.

Updating Forms

Reasons these forms would be updated:

- 1) A person receiving the notifications is no longer in the position – Notifications would need to be updated

- 2) Form Layout or content (on the Layout tab of each form)
- 3) Notification emails live in the Database Templates. Each is individual so the affiliate, dr, program, or leadership it is coming from can be unique

If you are creating a new form, notify the Director of Information Technology.

If you want a conditional response to the submitter – create two notification forms and setup the Notification as shown below

The screenshot shows the configuration for a notification named 'User Select notification 1'. The 'Target field' is set to 'RSVP'. Under 'Default Notification Template', the 'Use default template' option is selected. The 'Recipient Mapping' section shows two conditions: 'I WILL attend' and 'With regrets, I CANNOT attend', both mapped to 'Use default template'.

Yes, it is possible to set up conditional responses. I assume you are referring to the HIGH Summer Party 2026? Either way, I'll use that has an example. Steps are below. Plus, refer to attached screenshot.

1. Open the Notifications tab.
2. Click New beside User Select.
3. Set the Target Field to the RSVP radio field.
4. For each RSVP option, configure:
 - a. Recipient: {{ email }}
 - b. Notification Template:
 - i. "I WILL attend" → an RSVP Yes confirmation
 - ii. "With regrets, I CANNOT attend" → an RSVP No confirmation

Try configuring as noted above, save and test both options. That should work, but let me know how it goes or if anything is unclear.

Oh, and double-check that the **Email field** in the form is set to **required**.