



SearchKit + FormBuilder

A community success story.

Coleman Watts - CiviCamp Montreal 2024

2 Hard Things

2 Hard Things

Stuff In

2 Hard Things

Stuff In

Stuff Out

2 Hard Things

Stuff In

- Profile Forms
- Contribution Pages
- Event Registration Pages
- Drupal Webforms
- Wordpress Forms
- Form Processor
- Custom Code

Stuff Out

- Profile Listings
- CiviReport
- Advanced Search
- Search Builder
- Exports
- Drupal Views
- Other Extensions

Brought to you... by *you!*

<https://civicrm.org/make-it-happen>

FormBuider has over 50 sponsors to-date

SearchKit has over 30 sponsors



Brought to you... by *you!*

SearchKit ▼ ★

👤 315 ⭐ 📄 <https://civicrm.org/searchkit> - Open meetings 2nd Thursday of the month at 1700UTC - FAQ: Recent answers to SK/FB questions

FormBuilder ▼ ★

👤 325 ⭐ 📄 Open meetings 2nd Thursday of the month at 1700UTC <https://meet.jit.si/SearchfulKitsBuildFormly> - FAQ: Recent answers t...

AdminUI & SearchUI ▼ ★

👤 70 ⭐ 1 📄 This channel is about the [AdminUI](#) and [SearchUI](#) extensions replacing parts of the existing UI with SearchKit and FormBuild...



Brought to you... by *you!*

And the CiviCRM Partners!

<https://civicrm.org/civicrm/experts>

**WORK WITH A TRUSTED EXPERT
TO SETUP YOUR CIVICRM**

Make your next CiviCRM implementation a Success.

Find an Expert

CiviCRM® 

Lots of Features

Search for anything

Join things together

Display them anywhere

Segment data

Edit in place

Customize screens

Build layouts

Customize forms

Make searchable reports

Schedule communications

Export searches

Customize autocompletes

How Does This Benefit Humans?



Your Organization



When your data is a mess



Getting on-line



Input forms for your staff



Public forms for volunteers



Fetching your data



Table display



Grouping your data



Regional data



Adopting new technology



In Core

 Brent Adams-Bachman Sr.


 Actions

 Edit

 Delete Contact

 Layout: System Default

 Summary

 Expenses 0

 Contributions 2

 Pledges 0

 Memberships 0


 Events 2

 Cases 0

 Activities 154

 Relationships 4

 Groups 0

 Notes 2















 Tags 0

 Codes Redeemed 2

 Change Log 10

 Multi-Stuff 1

 + Add Note

 Subject	 Note	 Note Date	 Modified	 Created By	 Attachments	Comments	
Nerd	Also nerdy	November 30th, 2023 12:43 PM	November 30th, 2023 12:43 PM	Min, Ad		 0	 View  Edit  Delete
Cool kid	Is pretty cool	November 30th, 2023 12:42 PM	November 30th, 2023 12:43 PM	Min, Ad		 0	 View  Edit  Delete



In Core

 Brent Adams-Bachman Sr.

 Actions

 Edit

 Delete Contact

 Layout: System Default

 Summary

 Expenses 0

 Contributions 2

 Pledges 0

 Memberships 0

 Events 2

 Cases 0

 Activities 154

 Relationships 4

 Groups 0



 Notes 0

 Tags 0





 Codes Redeemed 2

 Change Log 10


 Multi-Stuff 1

Permissioned Relationships:  This contact can be viewed by the other.  This contact can be viewed and edited by the other.

 Add Relationship

Relationship	With	Dates	City	State/Prov	Email	Phone
Child of	 Dr. Arlyne Adams	-	Aydlett	North Carolina	adams.x.arlyne@mymail.co.pl	
Child of	 Beula Bachman	-	Barnstead	New Hampshire	bachman.k.beula@testmail.co.uk	354-4955
Household Member of	 Adams-Bachman family	-	Barnstead	New Hampshire		
Sibling of	 adams-bachman.eleonor@spamalot.co.in	-	Barnstead	New Hampshire	adams-bachman.eleonor@airmail.net	

These relationships are Disabled OR have a past End Date.

Relationship	With	Dates	City	State/Prov	Email	Phone
Health Services Coordinator	 One Bob	November 22nd, 2023 - November 23rd, 2023				



In Extensions

 Brent Adams-Bachman Sr.

 Actions

 Edit

 Delete Contact

 Layout: System Default

 Summary

 Expenses 0

 Contributions 2

 Pledges 0

 Memberships 0

 Events 2

 Cases 0

 Activities 154

 Relationships 4

 Groups 0






 Notes 0

 Tags 0

 Codes Redeemed 2

 Change Log 10

 Multi-Stuff 1

 Code	 Date Used	 Event	 Membership 
lwfesr2qq	November 30th, 2023 12:40 PM	Rain-forest Cup Youth Soccer Tournament	
s6twxgbm4	November 30th, 2023 12:40 PM	Fall Fundraiser Dinner	

2 results

Page Size



In Extensions

Discounts

Discount codes can be applied against events, memberships and price sets.

Filter

Code Description Organization

+ Add Discount Code

Code	Description	Enabled	Usage Count	Amount	Organization	Start Date	End Date	
s6twxgbm4	For cool kids	Yes	0 / Unlimited	50%				Edit Copy Delete
pj4ldt42c	For everyone	Yes	0 / Unlimited	10%				Edit Copy Delete
lwfesr2qq	For nerds	Yes	0 / Unlimited	100%				Edit Copy Delete

« < 1 > »

In Components

Mailing | Attachments | Publication | Responses | Tracking | Header and Footer

Mailing Name* ?

Campaign ?

Template 📄

From* ?

Recipients* 🔍 **No Recipients**

Exclude 🔍 ⚙️ Advanced

Subject*

</> Tokens ▼

HTML ?

📄 ✂️ 📄 📄 📄

B **I** **U** **S** **x₂** **x²** **I_x**

Styles ▼ Format

- 👤 Advisory Board
- 👤 Newsletter Subscribers
- 👤 Summer Program Volunteers
- 📄 (no name)
Unsent Mailing (2023-11-07)
- 📄 Copy of Yello
Unsent Mailing (2023-11-07)

</> Tokens ▼

In Components

Campaign Dashboard

Campaigns 2

Surveys 1

Petitions



Filter by title/description

Filter by type

Filter by status

+ Add Campaign

Title	Description	Start Date	End Date	Type	Status	Enabled	
A campaign		November 3rd, 2023 2:53 PM		Direct Mail		Yes	Edit Disable Delete
Another Campaign		November 30th, 2023 4:51 PM		Constituent Engagement		Yes	Edit Disable Delete

In Components that used to be extensions

Dr. Arlyne Adams

Actions Edit Delete Contact Layout: System Default

- Summary
- Expenses 0
- Contributions 0
- Pledges 0
- Memberships 0
- Events 0
- Cases 0
- Grants 1

+ Add Grant

Status	Type	Requested	Granted	Application received	Report received	Money transferred	
Eligible	Money	\$5,555.00					View Edit Delete

1 result « < 1 > » Page Size 50






ECK Extension

ECK Entity Types

Search ⚙️

The Entity Construction Kit extension allows you to create and manage custom CiviCRM entities.

[+ Add ECK Entity Type](#)

Entity Type	Internal Name	Sub Types			
 Animal	Animal	Cat, Dog, Horse, Giraffe	View Records	Edit Type	Delete Type
 Food	Food	Breakfast, Lunch, Dinner, Tea, Second Breakfast	View Records	Edit Type	Delete Type
 Furniture	Furniture	Bed, Chair, Desk	View Records	Edit Type	Delete Type
 Sport	Sport		View Records	Edit Type	Delete Type
 Vehicle	Vehicle	Car, Truck, Plane, Rocket, Bike	View Records	Edit Type	Delete Type

« < 1 > »

ECK Extension

Vehicle

Filter by Title Filter by Type

[+ Add Vehicle](#)

- Car
- Truck
- Plane
- Rocket
- Bike

[Action](#)

<input type="checkbox"/>	Title	Type	Created	Modified	
<input type="checkbox"/>	Ford Pinto	Car	November 30th, 2023 12:29 PM by Ad Min	November 30th, 2023 12:29 PM by Ad Min	
<input type="checkbox"/>	Specialized	Bike	November 30th, 2023 12:29 PM by Ad Min	November 30th, 2023 12:29 PM by Ad Min	View Edit Delete
<input type="checkbox"/>	Dreamliner	Plane	November 30th, 2023 12:29 PM by Ad Min	November 30th, 2023 12:29 PM by Ad Min	View Edit Delete
<input type="checkbox"/>	U-Haul	Truck	November 30th, 2023 12:30 PM by Ad Min	November 30th, 2023 12:30 PM by Ad Min	View Edit Delete
<input type="checkbox"/>	Saturn V	Rocket	November 30th, 2023 12:31 PM by Ad Min	November 30th, 2023 12:31 PM by Ad Min	View Edit Delete
<input type="checkbox"/>	Red Trek	Bike	November 30th, 2023 12:31 PM by Ad Min	November 30th, 2023 12:31 PM by Ad Min	View Edit Delete

6 results Page Size 50

User Dashboard

Your Contribution(s)

↕ TOTAL AMOUNT	↕ TYPE	↕ DATE	↕ RECEIPT SENT	↕ STATUS
\$25.00	Donation	October 7th, 2023 12:22 PM		Completed
\$100.00	Member Dues	October 7th, 2023 12:22 PM		Completed
\$800.00	Event Fee	October 7th, 2023 12:22 PM	October 7th, 2023 12:22 PM	Completed

Your Event(s)

↕ EVENT	↕ EVENT DATE	↕ ROLE	↕ STATUS
Rain-forest Cup Youth Soccer Tournament	April 19th, 2024 7:00 AM	Attendee	Registered

Your Group(s)

↕ GROUP	↕ STATUS	↕ SINCE
Advisory Board	Removed	October 9th, 2023 5:06 PM

Your Membership(s)

↕ TYPE	↕ MEMBER SINCE	↕ START DATE	↕ END DATE	↕ STATUS
General	October 7th, 2023	October 7th, 2023	October 6th, 2025	New

Personal Campaign Pages

↕ TITLE	↕ TYPE	↕ CAMPAIGN
---------	--------	------------

None Found

Your Pledges

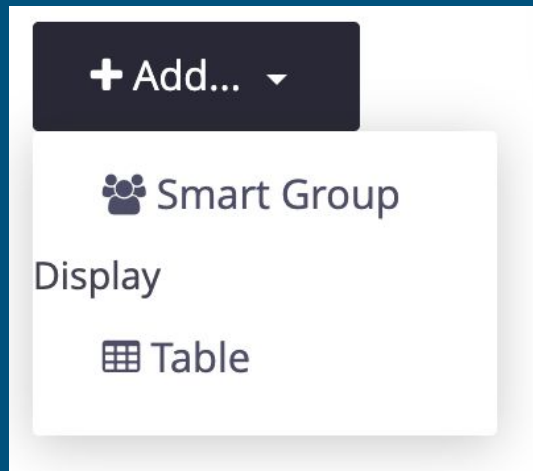
↕ PLEDGED	↕ TOTAL PAID	↕ PLEDGED FOR	↕ PLEDGE MADE	↕ NEXT PAY DATE	↕ NEXT AMOUNT	↕ STATUS
\$11.00	0	Donation	October 7th, 2023 12:00 AM	October 7th, 2023 12:00 AM	\$0.92	Pending

Your Contacts / Organizations

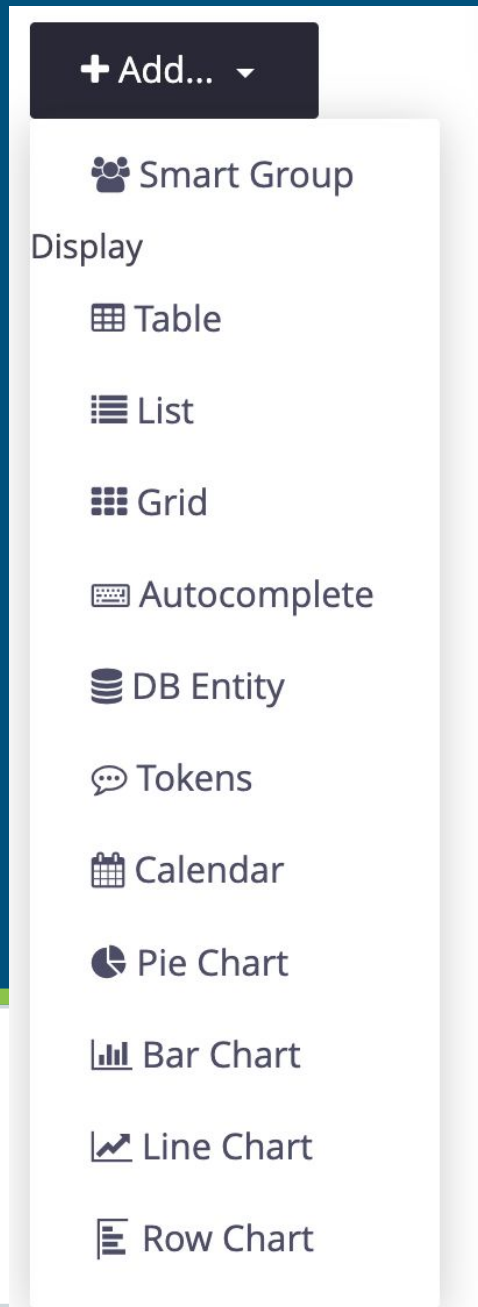
↕ RELATIONSHIP	↕ WITH	↕ SINCE	↕ CITY	↕ STATE/PROV	↕ EMAIL	↕ PHONE
Parent of	 sdeforest81@sample.net		Windfall	Indiana	sanfordd@fakemail.org	(484) 314-1561



New Possibilities



New Possibilities



+ Add... ▾

- Smart Group
- Display
 - Table
 - List
 - Grid
 - Autocomplete
 - DB Entity
 - Tokens
 - Calendar
 - Pie Chart
 - Bar Chart
 - Line Chart
 - Row Chart

<https://civicrm.org/make-it-happen>

New Possibilities

Where

Where *fx* ▼ First Name ✕ ▼ = ▼ Field ▼ Last Name ✕ ▼

First ✕ ▲ Display Name Order by

Q

Aggregate

Average
The mean of all values in the grouping.

Count
The number of items in the grouping.

First
First value in the grouping.

Data Segmentation

Custom Searches 2 | Packaged Searches 37 | Data Segmentation 0 | + New Data Segment

Label Description For Items

New Data Segment

Name *
Age Bracket
Name of the new computed search field.

Description

For * Contacts

Items

Label	Conditions
+ Infant	Age (years) < 2 + Add Condition
+ Child	Age (years) Is Between 2 - 12 + Add Condition
+ Teen	Age (years) Is Between 13 - 17 + Add Condition
+ Adult	Age (years) ≥ 18 + Add Condition

Access Keys: 0

Data Segmentation

Q Search Action ▾ 99 results

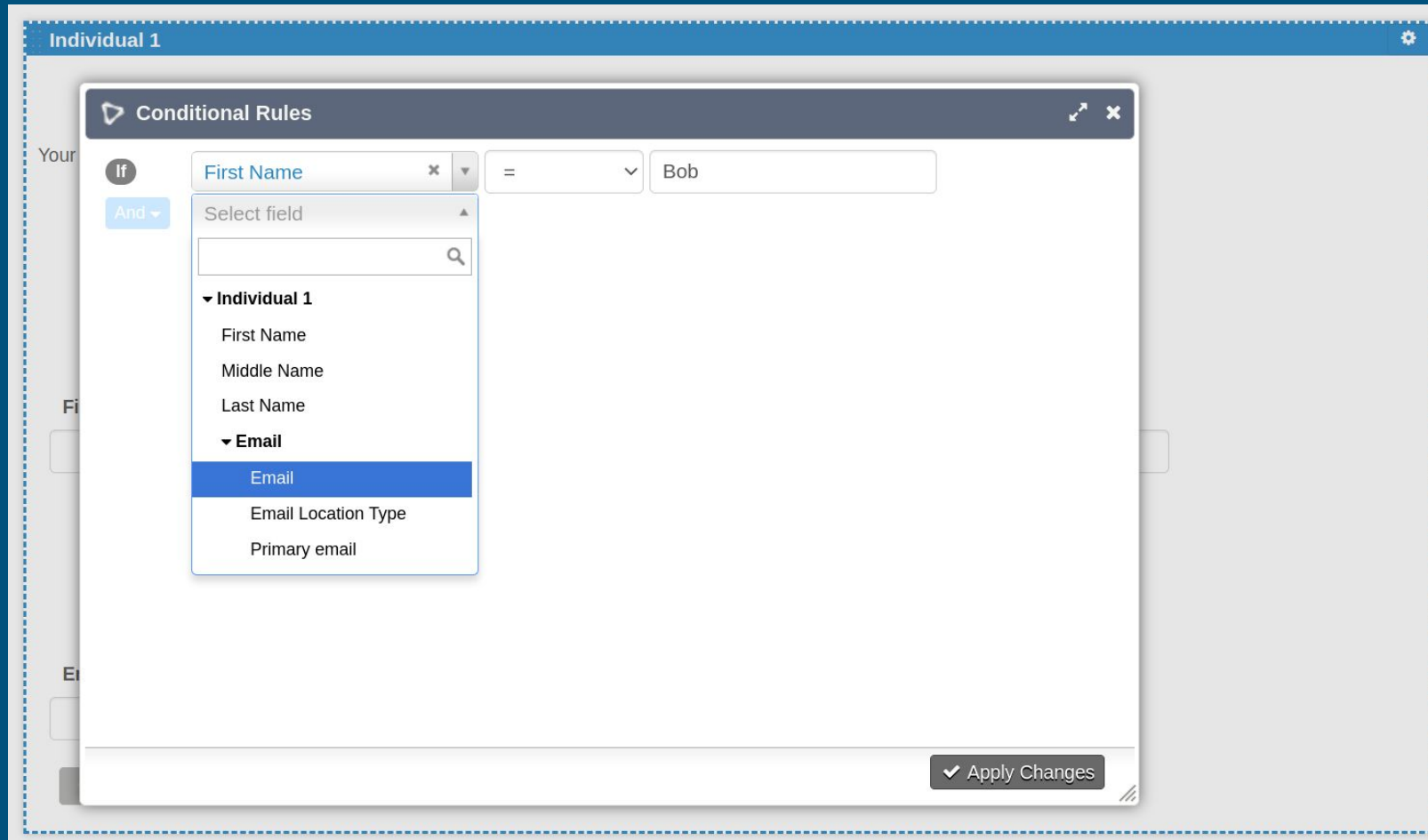
<input type="checkbox"/>	Sort Name ✕	Age (years) ✕	Age Bracket ✕	+ Add ▾
<input type="checkbox"/>	Adams-Bachman, Brent	4	Child	☰ ▾
<input type="checkbox"/>	Terrell, Ashlie	11	Child	☰ ▾
<input type="checkbox"/>	Terrell, Daren	13	Teen	☰ ▾
<input type="checkbox"/>	Jacobs-Olsen, Justina	13	Teen	☰ ▾
<input type="checkbox"/>	Cruz-Wattson, Roland	19	Adult	☰ ▾
<input type="checkbox"/>	Terrell, Allen	20	Adult	☰ ▾

Data Segmentation

<input type="checkbox"/> <input type="checkbox"/>		Age Bracket ✕	(Count) Contact ID ✕	+ Add <input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>	Adult	95	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>	Teen	2	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>	Child	2	<input type="checkbox"/>

3 results « < 1 > » Page Size

Yes, Conditionals



The screenshot shows the 'Conditional Rules' configuration window for 'Individual 1'. The rule is currently set to 'If First Name = Bob'. A dropdown menu is open, showing a search bar and a list of fields under 'Individual 1' and 'Email'. The 'Email' field is highlighted. The 'Apply Changes' button is visible at the bottom right.

Individual 1

Conditional Rules

If First Name = Bob

And

Select field

- Individual 1
 - First Name
 - Middle Name
 - Last Name
- Email
 - Email
 - Email Location Type
 - Primary email

Apply Changes

New Possibilities

Permission

CiviCRM: access CiviCRM backend and API

✓ And
Or

What permission is required to use this form? Join multiple permissions with "And" to require all, or "Or" to require at least one.

Expose To

Dashboard Dashlet

Allow CiviCRM users to add the form to their home dashboard.

Contact Summary Tab

Add tab to contact summary page.

Contact Summary Block

Add block to main contact summary tab.

Message Tokens

Allows CiviMail authors to easily link to this page

Element: Fieldset

Repeat

Layout:

Collapsible

Style: None

Panel Pane

Background:

Remove container

Existing Contact

Select Contact

Block: Individual Name

No title

First Name

Type: Autocomplete

Saved Search

User-Based

Quick Add

CiviCRM®

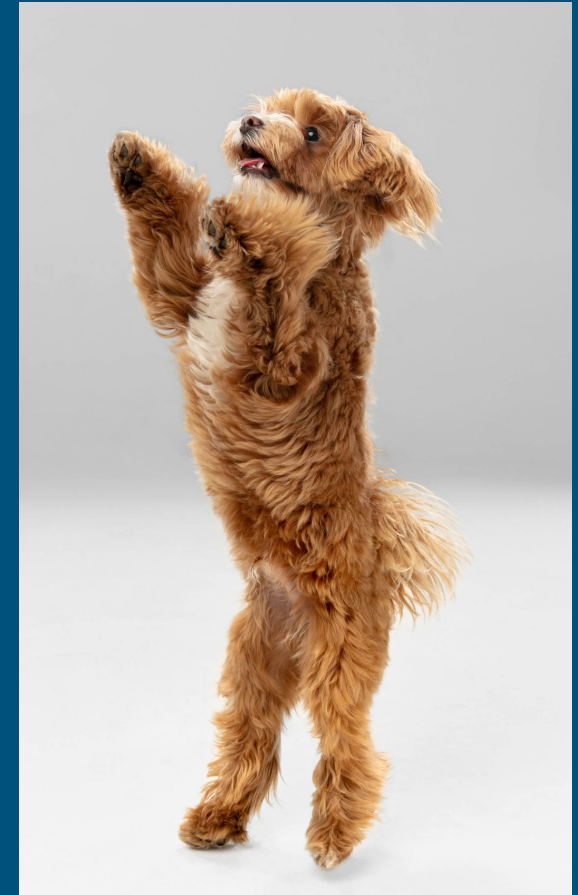


Rest API



Where is this going?

- ★ SearchKit Everywhere
- ★ FormBuilder as go-to
- ★ Extensions as first-class citizens
- ★ Easy to package & distribute
- ★ Easy to customize
- ★ Components as extensions
- ★ More than just contacts
- ★ A platform to build upon



2 Easy Things

Stuff In

FormBuilder

Stuff Out

SearchKit

...thanks to all of *you!*

The End

