

CIVICRM

Published : 2011-09-27
License : None

INTRODUCTION

1. WHAT IS CIVICRM?
2. REAL WORLD EXAMPLES
3. WHO IS CIVICRM?

1. WHAT IS CIVICRM?



CiviCRM is a powerful, web-based contact relationship management (CRM) system. It allows an organisation to record and manage information about the various people and other organizations it deals with. CiviCRM is more than just an address book, it also allows you to track your interactions with people and organizations and to get them to engage with, and potentially give money to, your organization through your website. The information you gather is all stored in one place but you can access it from almost anywhere.

CiviCRM focuses on the needs of non-profits. Most business CRMs are focused on managing commerce; CiviCRM emphasizes communicating with individuals, community engagement, managing contributions, and administering memberships.

CiviCRM is open source, which means there are no license costs or user fees associated with downloading, installing or using the software. You may incur costs if you use a consultant to implement CiviCRM to meet your specific needs and you may incur website hosting charges.

CiviCRM is web-based, which means it can be accessed by many users at the same time from different locations. It has been developed with the international community in mind, and translations and multi-language options are supported.

A MODEL FOR UNDERSTANDING CRMS

One way to understand what a CRM does is to think of your personal address book with enhanced capabilities. Imagine that every time you make a phone call to a given person, your address book automatically makes a note of it, together with brief description of the conversation. It can also decide whether to ask this person for a particular favor, based on whether she did this favor for you a week ago, and schedule a follow-up meeting following the call. After using this address book for a while, you could ask "What were my interactions with Ji Lao?" or "How many people helped me this month?" and it would give you the whole history.

Now let's say you're organizing a dinner party and you want to invite all the people you've met during the previous year. Just write the invitation and tell your address book to send the email. You don't have to worry about anything else after this point (apart from preparing the dinner!). Your address book handles the RSVPs from all invited guests, together with information about who is vegetarian and who is not. It even lets you know two nights before the event how many people you can expect.

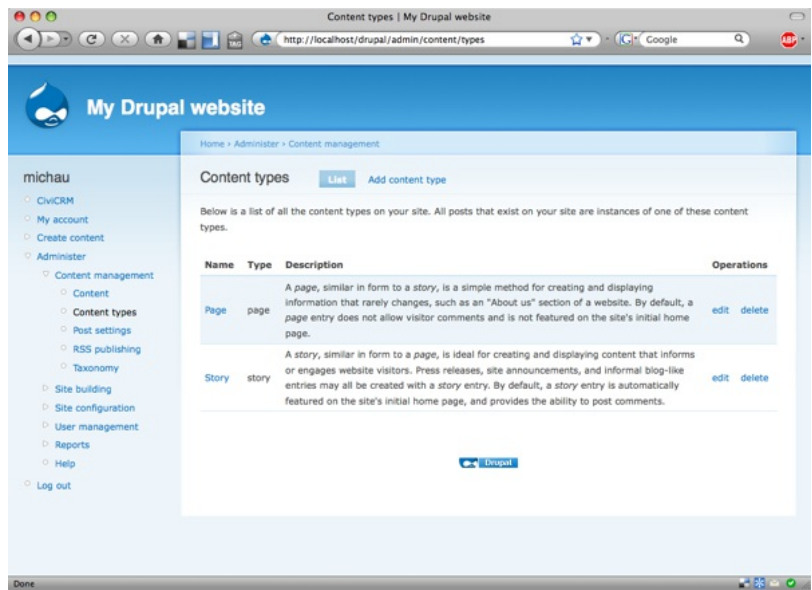
It would be great to have such an "assistant", right? Organizations need one even more. It's hard to remember all of your meetings, phone calls and other forms of contact (especially over the long term), but the more you know about the people and organisations you interact with, the more successful your work will be. You'll be able to target your message to specific groups, because you know who will be interested in specific topics, and you'll be able to observe their reactions and adjust your next interaction, and continue to improve how you talk to different groups.

CIVICRM AND CONTENT MANAGEMENT SYSTEMS

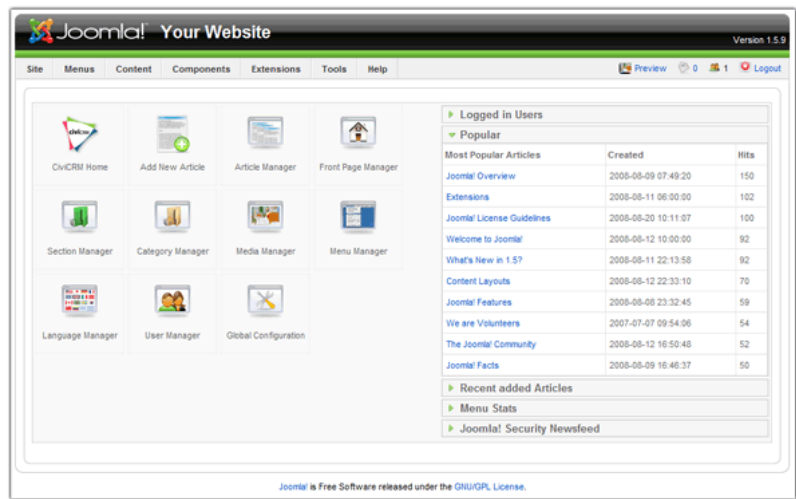
CiviCRM works together with another common piece of software: a content management system (CMS). A CMS is a tool for creating and managing websites, and most websites these days are based on a CMS.

Integration with a CMS offers a number of advantages for CiviCRM, most notably:

- visitors to your website can carry out many activities on their own, such as renewing their membership, signing up for events, requesting email updates, and donating money
- you can share parts of your data, for example event information, with visitors to your website



Drupal Content Management System - Content Types Screen



Joomla! Content Management System - Control Panel screen

2. REAL WORLD EXAMPLES

CiviCRM is used by all shapes and sizes of organisations that are located all over the world. Some have no paid employees, while others might have several hundred. Their needs range from very simple to fairly complex. In this chapter, we will have a look at real world examples of how organizations are using CiviCRM.

Throughout this chapter you will see references to CiviCRM features such as CiviEmail, CiviMember, CiviPledge, CiviCRM Profiles and others. These are all components of CiviCRM and we have included references to them so you can become familiar with the language of CiviCRM; however, it's not important to understand the finer detail of these features at this point.

A SPECTACULAR PERFORMANCE



This example shows how clubs can use CiviCRM for summer camps, regular classes and other events.

Wellington Circus Trust in Wellington, New Zealand is run entirely by volunteers. They have a mailing list of 500-600 people and run blocks of classes in circus skills such as trapeze and hula hoop. They also host events. For safety reasons, the Trust needs to gather information about who to contact in the case of a student being injured. The Trust processes about 200 enrolments a year.

Prior to using CiviCRM, the Trust maintained a Microsoft Access database, but data entry was time-consuming, keeping information up-to-date was difficult and emailing the resulting contact information to the tutors on a regular basis was challenging. The treasurer wanted members to be able to maintain their own details and wanted the tutors and volunteers to be able to access member's contact details from anywhere.

What They Did

After some research, the Trust decided that CiviCRM could enable them do the things they needed to do, and as soon as the system was up and running they began to make the most of it.

- They up online enrolment for circus skills classes with the CiviEvent component, and decided to pay a commission to a payment processing company so that credit cards could be used for online class payments. They also used CiviEvent to set limits on the number of students that could enroll in a given class.
- To track emergency contact information, custom data fields were created and added to a profile that was used as a form for event registration. This information was then stored in CiviCRM.
- They integrated CiviCRM with Drupal and set up user accounts for every contact in their database. The system's users were then instructed on how to use the Drupal 'reset my password' link to gain access to the system for the first time so that they could then update their own information.
- CiviMail was implemented to contact tutors, volunteers and students.
- Since the Trust applies for grants from funding bodies, they enabled the CiviGrant component.

The Results

Simply by implementing CiviCRM, tutors and volunteers can now access and manage information from anywhere in the world where they have internet connectivity.

By implementing CiviEvent with a payment processor and custom data fields, people are able to enroll in and pay for classes online and provide the important emergency contact information at the same time. Allowing people to sign-up online has greatly reduced the amount of time spent on data entry.

By integrating CiviCRM with Drupal and setting up user accounts, contacts are able to maintain and update their own information, greatly reducing administration time and improving the accuracy of the data.

Implementing CiviMail has made it easy to email tutors, volunteers and students, and removed the administrative burden of manually updating the mailing list and contact information because contacts can do their own updates. The treasurer also found that it saved her from having hundreds of sent items in her email client, which used to be the result of using Microsoft Office mail merges to send out email newsletters.

Prior to implementing CiviGrant, the Wellington Circus Trust had not been effective at tracking the status of grant applications. By using CiviGrant, they are now able to see at a glance what grant applications had been sent and the status of each application.

All up, the Trust estimates that installing CiviCRM has saved hundreds of volunteer hours over the course of a year.

After moving to CiviCRM, the Trust found that both contact management and class registration were easier. One issue they encountered was that some people were confused about having to reset their Drupal passwords. The Trust thinks that putting more effort into the way they explained this on their website would have helped. Another issue was the standard PayPal interface which was initially implemented as a payment processor; people found this difficult to use, and after six months the Trust invested in developing a payment processor more appropriate to New Zealand.

They also learned that a cheap hosting provider is not always the best option: quite a bit of time was wasted before they switched from a free provider to one that costs them approximately \$NZD20 per month and provides significantly better service.

SUFFERING RELIEVED!



**American Friends
Service Committee**

Quaker values in action

The American Friends Service Committee (AFSC) is a large, Quaker-based, peace and social justice organisation with over 400 employees. Worldwide, they run programmes that work to relieve and prevent suffering through both immediate aid and long-term development, and they seek to serve the needs of people on all sides of violent strife.

Their main headquarters are located in Philadelphia, Pennsylvania. They have nine regional headquarters located throughout the United States, some 50 area offices also located in the USA, and numerous international field offices located in Africa, Asia, Europe, Latin America, the Caribbean and the Middle East.

Lists of constituents are maintained by each office. The specific CRM system needs of each office vary but the general needs are: searching for constituents that meet certain criteria; sending emails, newsletters, postal mail and announcements; and collecting the contact information of people who sign online petitions and register for events online.

Through a survey conducted by the AFSC Information Technology Department, it was revealed that AFSC staff were using a variety of systems to keep track of their constituents. It also became obvious that these systems were not working effectively: repositories of data were everywhere, contact information was duplicated, staff were having a hard time managing their contacts and the IT Department was unable to provide adequate support.

The survey also found that staff members were frustrated with the systems they were using because they lacked the necessary functionality for them to effectively communicate and do outreach. Specifically: search capability was limited; there was no ability to send high-volume emails which meant that it was not possible to send newsletters or announcements; and there was no ability to collect information online.

After investigating several database systems, the IT Department finally decided that, all things considered, CiviCRM might be the best fit for the AFSC.

What They Did

Initially, CiviCRM sites with CiviMail, managed by an external vendor, were established for offices in Los Angeles, Rhode Island, San Francisco and Seattle. Los Angeles also chose to use the CiviEvent component to track event registrations and the CiviMember component to track contact information of committee members.

After implementation, an LA staff person discovered that certain functionality was missing from the CiviMember export component and this was preventing them from being able to compile a membership directory. AFSC talked to the CiviCRM Core development team and contracted them to add the missing functionality. This was a win-win situation: AFSC got the functionality they needed and because it was integrated back into the CiviCRM product, the entire CiviCRM community was able to benefit from the addition. An extra advantage for AFSC is that because the functionality became a standard part of CiviCRM they don't have to worry about compatibility with future upgrades.

The Results

The decision to have their sites hosted and managed by an external vendor turned out not to be a good one when the vendor ran into difficulties and was not responsive to issues or in providing the services that had been promised, such as timely updates for CiviCRM. Once the hosting issue was resolved, staff were able to take full advantage of the capabilities of CiviCRM and do all of the things that they had previously been unable to do.

The Los Angeles office is in full swing, using CiviCRM as the main repository to track their constituents, board, committee members and volunteers. Their constituents are able to sign up for events and petitions online, and staff can send volume emails for newsletters and announcements.

Getting rid of their old system and being able to send out a monthly newsletter was the main goal for the Colorado office, who came on board with CiviCRM a little later in the process. They are now able to identify newsletter subscribers and send the newsletter to them via CiviCRM. They couldn't be happier!

The AFSC currently has nine CiviCRM sites and the IT Department is now recommending CiviCRM as the "database of choice" for all of its offices. Support from the CiviCRM community is excellent and CiviCRM itself is improving every day, as more and more functionality being added. AFSC staff are now able to access their data from any place that has internet access, run complex searches, manage online event registrations and send online newsletters and postal mailings. CiviCRM has enabled them to better manage their constituents. This makes their life easier and in turn, is of great benefit to AFSC.

ACTIVATING THE COMMUNITY



The Healthy Environment Alliance of Utah (HEAL) is a grassroots environmental organisation working to protect Utahns from nuclear and toxic waste. Before moving to CiviCRM, they were stuck with a Microsoft Access database. They may have called it a database, but in fact it was a glorified spreadsheet that did little to facilitate their day-to-day operations. The goal for the CiviCRM project was to move to a system that would centralise all of their information across their organisation including email lists, volunteer tracking, donor history and more. As an advocacy and community action organisation, effective engagement with their supporters and tracking the relationships they build with their constituency over time is critical to their mission. They needed a tool to support that mission.

What They Did

HEAL has been using CiviCRM since the early days of the software and CiviCRM is now the central place to track all donors, volunteers, legislators, foundations and contacts. They use CiviCRM for donor management, email communications, event management, volunteer tracking, and advocacy.

- For advocacy purposes, constituents' legislative districts are monitored so that when issues arise that need action, HEAL can mobilise its members on a district-by-district basis.
- The system tracks volunteers, the activities they participate in, and their interests.
- HEAL holds large fundraising events with free admission where donations are solicited. CiviEvent handles all of the online registrations and collects data, such as guest names and interests. Invitations, reminders, and follow-up messages are sent via postal mail and the CiviMail component.
- CiviContribute allows HEAL to run donor reports as well as accept online donations.

The Results

There is no question that CiviCRM streamlined and consolidated HEAL Utah's data management and saved the organisation valuable resources. It is interesting to note that over the last several years their advocacy campaigns have been more successful and their impact in their community more noticeable - perhaps in part because they have been able to redirect limited resources away from administration and into the real work.

The biggest lesson that CiviCRM has brought to HEAL is to force them to always think about what role technology will play in their outreach and organising work.

A CRM EDUCATION



Schoolhouse Supplies (SHS) is a Portland, Oregon, USA-based non-profit organisation which gathers and distributes school supplies to students and teachers.

Prior to implementing CiviCRM, SHS used a combination of software programmes including Exceed, EROI, Constant Contact, Salesforce, Auction Pay (for online contributions) and, of course, hundreds of spreadsheets. In addition, SHS had a custom web application for managing its online store inventory and processing in-kind donations.

What They Did

By moving to CiviCRM, SHS has centralised their operations and the management all their constituent data, and been able to unify and coordinate several of their core business processes.

All data from each source has been migrated to CiviCRM Standalone (an installation that is not integrated with either Drupal or Joomla! CMS). CiviContact and CiviContribute have replaced Exceed and Auction Pay. CiviMail has replaced EROI and Constant Contact. Salesforce data was moved into CiviCRM and the custom e-commerce application it supported was integrated with CiviCRM. Lastly, the inventory and in-kind management system was integrated with CiviCRM. Spreadsheets have been imported.

The Results

Each business process at SHS can now take advantage of their full constituent database and business activities are easily coordinated. More importantly, SHS is now in the process of taking manual business processes (such as volunteer coordination) and moving them to CiviCRM. New campaigns are now being planned and executed which would previously have been impossible or prohibitively expensive.

GROWING SATISFACTION



The New York State Nursery Landscape Association (NYSNLA) is a member-based association providing resources and advocacy support for nursery and landscape professionals throughout New York State. The organisation seeks to advance the interests of New York State's nursery and landscape businesses and professionals by promoting sound business practices, expanding state and local markets, and exercising leadership in the development of sustainable communities.

Prior to migrating to CiviCRM the Association went through several iterations of member-management solutions, beginning with a series of spreadsheet documents and later moving to a Microsoft Access database. The move to CiviCRM was prompted by the desire to consolidate data, provide members real-time access to contact details, and to create a searchable member directory to website visitors who may be looking for a nursery or landscape professional.

What They Did

Working with a CiviCRM consultant, NYSNLA began the process of analysing the structure and content of their existing database and mapping the various functions to CiviCRM structures. They determined that they would use CiviMember, CiviEvent, CiviContribute, and CiviMail to address their core database needs, and would consider using CiviPledge at some point in the future for soliciting contributions to their associated non-profit, the Nurserymen's Foundation.

One data area that required particular attention was their Certified Nursery Landscape Professional program (CNLP). CNLP is an intensive, on-going educational programme designed to increase the skills of garden and landscape employees. The programme was designed by members of the nursery and landscape industry with assistance from Cornell University. Interested individuals must apply to the programme and successfully pass a test. Certification lasts two years, after which time the individual must recertify.

NYSNLA used CiviCRM's membership functionality to track the status of CNLPs. The ability to define a rolling-period membership and to gauge when they are nearing expiration perfectly met their management needs. The initial application process, which also must be carefully tracked, was handled through CiviEvent, as an application to the programme is essentially a registration to attend one of the bi-annual test events.

The Association also took advantage of CiviCRM's open source platform to make some interface customisations that improved the way they view contact records. Because of the importance of the CNLP programme, they wanted to be able to look at all employees for a certain nursery/landscape company and quickly know if any of them are CNLPs or Lifetime CNLPs. They also needed to easily find out which employees are authorised to manage the company's records.

The Results

The Association has worked hard to communicate to the public the importance of using a qualified landscape professional. Essential to this effort was the inclusion of a searchable member directory on their website. Using CiviCRM, they were able to create a search page that included geographic segmentation (the Association divides members into 8 regions state-wide) and a list of services provided by members (using CiviCRM's tags feature). The resulting search tool, because it is directly connected with their contact data, ensures website visitors are always looking at current information. The Association is also able to provide members direct access to their own contact details so they can update and maintain their list of services provided and other information.

CAMPAIGNING FOR EFFICIENCY



The Green Party has been the third largest party in New Zealand politics for most of the last decade, with strong roots in the Values Party (the world's first national Green party) of the early 1970s. They achieved parliamentary representation in 1996 and after the 2008 election had 9 Members of Parliament, 5,000 financial members and some 50,000 contacts. The Party has more than 50 branches around the country and contest elections across all 67 electorates in the last election.

Prior to adopting CiviCRM, the Party and its parliamentary units employed a range of systems for managing members, donations, contacts, campaigning, media and advocacy.

The Green Party policy states:

- Development of IT must be socially responsible and sustainable.
- The use of free and open source software should be encouraged.

What They Did

CiviCRM was adopted by the Party in 2007 (version 1.7), with a switch to Drupal as a parallel project. This was inspired in part by work done by the Canadian Greens on developing a voter canvassing module for Drupal. A Party database was set up using CiviCRM and online donations, memberships and event registrations were instigated.

The Greens have over 100 different issues that they generate media releases about. These were reconstructed as a check-box custom data field, and Smart Groups were built for each of these, for use when sending out media releases via CiviMail.

The highly complex access control requirements of the party necessitated the development of an alternative approach to the use of ACLs (Access Control Lists) in order to provide a more easily managed, highly granular system. This approach has now been incorporated as a hook (something that can be utilised by developers to extend CiviCRM) into the core code.

For the 2008 election campaign, a look-up function was developed so that when new contacts were added to the database, addresses were checked against a table containing the Electoral Roll, and links were created where matches were made. "Soft" matches were also recorded.

The Results

In the 2008 election campaign, the Party made extensive use of online fundraising and greatly exceeded previous online income. Membership renewal has been streamlined with more online renewals occurring.

As of May 2009, the Party was still using CiviCRM v2.0 on Drupal 5 and therefore had not yet benefited from the many features that became available through the 2.1 and 2.2 releases. An upgrade was in progress at the time.

In a complex organisation such as the Green Party, training can be a limiting factor, as well as the need to nurture more in-house super-users. New features in CiviCRM have led to some rethinking about the Party's usage of custom data fields, particularly with regard to the use of CiviMail for media releases. New options for both nested groups and Drupal Organic Groups suggest that a more time effective approach may soon be possible.

QUEST FOR SUCCESS



QuestBridge is dedicated to helping bright, motivated low-income high school students get accepted to and able to pay for college. QuestBridge recruits high school juniors throughout the USA and invites them to fill out the QuestBridge application online. QuestBridge also partners with the USA's most selective colleges and universities with the aim to increase the socio-economic diversity of their student bodies. QuestBridge's college partners accept the QuestBridge application in lieu of their own admissions application.

What They Did

QuestBridge has built most of its business processes around CiviCRM. They wrote their online admission application using CiviCRM and extended it using the PHP scripting language. CiviCRM is used to store biographical and application information and communication histories about the students.

The Results



In the 2008-9 school year, QuestBridge helped more than 1200 students get accepted and pay for college at its 25 partner schools. They accomplished their goals in a very efficient manner, in part thanks to their effective implementation of CiviCRM. QuestBridge is currently planning to upgrade to the latest version of CiviCRM in order to take full advantage of the new email features.

If Questbridge were to start over they would have invested more in training on CiviCRM up-front.

CHANGING WITH THE TIMES



The San Francisco School (SFS), is a Preschool through 8th grade coeducational school with a diverse student body of about 270 students. Like all schools, communication between the school and families is very important. Whether it's updating a home phone number, email address or allergy, it is essential in meeting the needs of the students. The head of school was a strong supporter of the project from the beginning which led the staff and parents to be able to make a strong commitment to help the project move forward.

What They Did

They used CiviCRM to create a Parent Portal to:

- required parents to log in to view their contact information and their child's school information
- had an automated system to schedule parent teacher conferences
- used a computer to record after school class sign in and sign out
- managed after school class registration (example: music, cooking, sports) and view their child's after school fees

To ease the transition of the school community, each of the above features were shown gradually rather than all at the same time.

The Results

Enabling parents/guardians to view their contact information meant that they could confirm what the school sees and hence notify the school of any changes. Also, they could view their child's after school fees and view a record of what classes their child is signed up for. Online sign ups allow parents the flexibility to schedule parent/teacher conferences and after school classes on their own time. Changing the existing school systems to an online system allowed both parents and staff to work together, view the Parent Portal so that contact information is current, parent teacher conferences are scheduled in a timely manner, and that access to the information is widely accessible.

3. WHO IS CIVICRM?

CiviCRM has a unique and diverse community centered around developing, using, and documenting the software. Our community includes the CiviCRM core team, people at the non-profits that use CiviCRM; consultants working with a number of non-profit organizations; programmers and developers, power users, volunteers and community organizers! We are also closely related to many other open source projects.

Each member of the community interacts with CiviCRM in their own way, working to improve the software and how we organize ourselves. The strength of community comes from this diversity and the ease with which someone can join us, and means that we are constantly changing and improving, often in unexpected ways.

Like all communities your membership is characterised by your interactions. If you treat others well, have some fun, and help others, then you can expect to enjoy being a member of the CiviCRM community. But if you are prone to complaining or don't use a respectful tone in communications, or if you see the community just as a resource and not as a collection of very kind, generous and clever people, then you are probably not going to get much of a response. Treat people well and you can find the CiviCRM community fun and rewarding.

HISTORY

CiviCRM started in 2004 by Dave Greenberg, Donald Lobo and Michal Mach. The founders had a lot of previous experience working with non-profit organizations and tools. The group was influenced very early by Zack Rosen and Neil Drumm, who convinced them to use Drupal as a fundamental cornerstone for CiviCRM. This decision has meant that the developers have been able to leverage a lot of the functionality that Drupal provides, freeing the team up to focus on building the features necessary to make a great CRM.

In 2005 the first version of CiviCRM was released with two of the core modules in place: CiviMail and CiviContribute (you can read more about these later).

Since those early days CiviCRM has built a large community of users and contributors (there are now over 8000 installed sites), the software has gone from strength to strength (there are now 8 core modules and additional third party components), and the core team has expanded to 8 members. There is also a large ecology of free software contributors around the project and high-profile non-profit organisations such as Wikipedia, Creative Commons, Mozilla, and Amnesty International use CiviCRM.

IT'S GOOD TO TALK

CiviCRM is an open and learning community, and people are ready to hear your ideas. If you have a good idea, there's nothing to stop you carrying it out - but the best way to start, is to start talking about it.

If you're not sure where to start, the best place is probably the community forum (<http://forum.civicrm.org/>). Ask people what they think about your idea. There's a wealth of experience on the forum, and with a bit of luck, someone will have tried something similar before. CiviCRM people are a friendly bunch and their guiding philosophy is collaboration.

Depending on your idea, you'll be directed to the next best place - maybe an article on the blog (<http://civicrm.org/blog/>), a page on the wiki (<http://wiki.civicrm.org/>), a teleconference or a meeting up with another community member in real life, yes that's right, REAL LIFE!

BE THE CHANGE

So you have a great idea. Now you need an equally great action plan to accompany this idea and then you'll need to implement it. Although the CiviCRM community is friendly and supportive and will like to be involved and updated about your project, you'll need to be the driver. How will you get the resources together for your project? How can you fit it in with your day job? Finding a way to simultaneously achieve your own objectives and benefiting the CiviCRM community is the best way of getting things done.

AND FINALLY...

If you're a CiviCRM user who has an ongoing relationship with a consultant, there's nothing to stop you from also being an active member of the community. The community really benefits from direct feedback from end users - your consultant is only one person or organization - by asking on the forums you're opening yourself up to help and input from the entire community.

GETTING PREPARED

4. IS CIVICRM FOR YOU?
5. IDENTIFYING YOUR NEEDS
6. TRANSITIONING TO CIVICRM

4. IS CIVICRM FOR YOU?

This chapter will help you to decide whether CiviCRM is the right tool for your organisation.

CiviCRM is powerful software and has the potential to help your organisation reach its goals - but it won't be the right choice for every organisation. Here are some ways that you can find out whether CiviCRM is right for your organisation:

- read the book! (you might be doing that right now)
- play with a demonstration site
- install a test database
- talk to others who use CiviCRM
- talk to a CiviCRM consultant.

DEMONSTRATION SITES

CiviCRM hosts several demo sites - there is at least one for each of the two supported Content Management Systems (CMS) - Drupal and Joomla!. The demo sites present a working copy of the latest stable version of CiviCRM with sample data. You can use them to play around with CiviCRM but be aware that they are publicly viewable so you shouldn't enter personal data.

A list of the available demos can be found at <http://demo.civicrm.org/>

Other people are likely playing on the demo sites at the same time as you, so they may be configured strangely, missing functionality or appear in different languages.

The demos have some limitations - you can't send emails from them, you can't set permissions for Drupal users or do a full exploration of online payment options.

If you are having trouble working on a demo site, contact the CiviCRM core team via the forum or IRC. If you want a more controlled environment for exploring CiviCRM, install your own test site.

TEST INSTALLATIONS

If you have technical skills or are feeling adventurous, you can download and set up a local version of CiviCRM, that is a version that is stored on your local computer rather than on a server on the internet. You'll still access it through a browser, but it will only be visible on your computer. The advantage of a test installation is that you can configure CiviCRM in the way that you want to use it, and experiment with your data.

Up-to-date information for installations (including troubleshooting tips) is maintained at <http://wiki.civicrm.org/confluence/display/CRMDOC/Installation+and+Upgrades>.

TALKING TO OTHERS WHO USE CIVICRM

If you know of another organisation that uses CiviCRM, talk to them about their experience. Obviously the more similar they are to your organisation, the better. If you don't know anyone that is using CiviCRM, have a look on the CiviCRM forums, at case studies on the community site, or try your local non-profit technology mailing list.

The CiviCRM forums (<http://forum.civicrm.org>) have a few boards for people who are new to CiviCRM, such as "Pre-installation Questions" (<http://forum.civicrm.org/index.php/board.5.0.html>). Remember that the forums are staffed mainly by volunteers so you will get a better response if you spend some time formulating an easily answerable question. You can also search the forums and browse for questions that others have asked. If you wish to ask questions or contribute to the discussions you must register first.

TALKING TO CIVICRM CONSULTANTS

Another option to help you understand CiviCRM is to make use of a professional. The CiviCRM website lists professional vendors and consultants that can walk you through CiviCRM (<http://civicrm.org/professional>), and there are many others; you may find a local website company who has experience with CiviCRM. Consider hiring a consultant for a day to discuss with you how CiviCRM could help your organisation.

5. IDENTIFYING YOUR NEEDS

This chapter covers some basic strategies for identifying your organisational needs, and how they could be met by CiviCRM. It doesn't go into detail about CiviCRM functionality or how CiviCRM stores data (you will find that in other chapters). Instead, we encourage you to first take a step back and think about your organisation.

YOUR ORGANISATIONAL GOALS AND PRACTICES

For now, forget about technology and focus on your organisational goals and processes. Here's a list of questions to start you off:

- What are the high level goals of your organisation?
- What tasks are staff involved with on a day to day basis?
- What activities do staff carry out with your contacts (members, constituents, clients)?
- What different teams and roles exist within your organisation?
- What services do you provide to your contacts?
- How do you communicate with your contacts? (include information flows into and out of your organisation)
- What happens when you receive someone's contact information?
- In what ways does money flow in and out of your organisation?
- Does your organisation have a membership structure?

UNDERSTAND YOUR "CONTACT RELATIONS"

The CRM in CiviCRM stands for Contact Relationship Management. By contact, we mean an individual, household or organisation that your organisation has contact with (you may call them members, constituents, clients or some other term).

Many organisations make the mistake of not thinking about who their contacts actually are. Spend some time identifying all the people involved with your organisation. What different types of people do you interact with, and how do they differ from each other? The better you understand them and their interactions with your organisation, the better you can model them in CiviCRM. Anecdotal or systematic feedback from your contacts may be useful here.

TAKE ADVANTAGE OF INSTITUTIONAL KNOWLEDGE

In thinking about your contacts and their interactions with your organisation, talk to your co-workers, including those who have been around the longest and those who have just joined. Talk to as many people as possible to get a complete picture of their interactions with all kinds of contacts.

As well as talking to people, look at your organisation's data repositories: your databases, spreadsheets, file servers, address books, and any existing stored information you may have that can help you understand who your contacts are and how they interact with your organisation.

MAP YOUR NEEDS TO CIVICRM

CiviCRM has been designed to be flexible and adaptable, based on feedback from many different non-profits, but it may not map exactly to the ways that your organisation currently works. Doing things the CiviCRM way could mean adapting your workflow and adopting best practice in non-profit technology. Be pragmatic and flexible and consider whether your current working practices need to change.

It's worth remembering that CiviCRM offers many opportunities to interact with your contacts in ways that you have not previously had. Taking advantage of these new possibilities can lead to positive changes and improvements.

6. TRANSITIONING TO CIVICRM

This chapter outlines the parts that typically make up a CiviCRM project and should be read by people about to embark on a CiviCRM project. Some of this information may be obvious to experienced project managers. A comprehensive guide to project management is beyond the scope of one chapter but we have outlined things that are typically encountered in a CiviCRM project and provided pointers on some things to watch out for.

First, some pop philosophy courtesy of Cynthia Tarasco:

"Life is a series of making decisions. Some decisions are easy because they do not require a substantial investment of time or money. Deciding which flavor ice cream to buy fits into this category: if you get vanilla today you can always get chocolate tomorrow. Other decisions are much more difficult because they require substantial investments of resources, and you will be living with your choice for the foreseeable future. Adopting a new CRM fits into this category, so planning and project management are vital".

When you start out on a new CiviCRM project you should spend time thinking about:

- the people who will be involved in the project
- what the business goals of using CiviCRM are
- how you will approach the initial development
- what ongoing support you will need
- the costs associated with hosting and your IT infrastructure
- training and documentation
- change management

PEOPLE AND THE PROJECT TEAM

Including a wide range of people that represent the different parts of your organisation will help with delivery of your project. A mixture of management and day-to-day staff helps the team to keep an eye on the big picture as well as ensure that the project is ultimately useful to frontline staff.

You'll be exploring new territory with your CiviCRM installation and this can sometimes be stressful. It might be helpful to share project management of the project with others who can give you a different perspective and moral support when you need it!

Managing a CiviCRM project will require a major time investment from people within your organisation, even if you employ an external consultant. Organisations often under-estimate the amount of time that will be required from their staff in implementing an IT project - such as training, modifying existing processes and providing new or updated information to relevant people. It's not something that can be tacked on to the end of an already busy schedule and this should be taken into consideration.

GOALS

You should have a good idea of the goals for implementing CiviCRM. This could be something like: reduce administrative work in managing events by 25% or manage 25% more donations with the same staff. The goals should be SMART (specific, measurable, attainable, relevant, timely)!

These business goals will help you in directing and managing your project. For example, if the project group for example want some customization that requires budget and effort, your business goals will help you decide one way or the other. The business goals will help you to focus on why you are implementing CiviCRM and what you want to achieve in the long run.

DEVELOPMENT

It often makes sense to break development up into smaller more manageable sections, which can be implemented in discrete stages or iterations. A common first phase of development is to choose something simple to implement in CiviCRM, or specific functionality for a team who can then act as CiviCRM evangelists within the organisation.

Implementing in stages allows staff to get used to changes gradually without feeling overwhelmed, and gives the developer or implementer the ability to be responsive to feedback from users during the development process.

Another reason that people choose to develop iteratively is that it is very hard for users to correctly or fully articulate their requirements at the start of the project. Giving users hands-on experience of an early version of the system helps them understand how it works and what is possible. They can then provide valuable feedback and might articulate requirements that they haven't thought of previously.

Implementing your CMS (Drupal or Joomla!) either before or after implementing CiviCRM is another convenient way to split up a CiviCRM project. As well as the normal advantages of breaking up the development into manageable chunks, this helps staff understand the important differences between a CMS and a CRM.

Pilot projects

Pilots help to reduce risk during a project implementation. For example, rather than moving your organisation's entire event management infrastructure to CiviCRM, run one pilot event using CiviCRM and evaluate it. You can then incorporate the learning back into the development process.

ONGOING SUPPORT AND DEVELOPMENT

It is a mistake to think about a CiviCRM project as a one-off development that will meet the needs of your organisation for the foreseeable future. Organisations constantly change and evolve and your CRM should evolve with you, otherwise it will eventually become out-of-sync with the organisation.

Once you have been using CiviCRM for a while and staff are comfortable with it, you will likely want to take advantage of other functionality. Each improvement or new piece of functionality that you decide to implement in CiviCRM will take resources, so you'll need to plan for these.

Even if your organisational needs don't change, there are ongoing support implications, including:

- keeping your site up-to-date with security patches
- upgrading to the latest version of CiviCRM (not necessary, but CiviCRM is improving all the time and your users will thank you for the improved usability and functionality each time you upgrade)
- upgrading the CMS (Drupal or Joomla!)
- hosting

TRAINING

Training is a significant aspect of most CiviCRM projects. Your training could take many shapes and sizes depending on your users, but it often makes sense to spend resources on formal and reusable training resources (user guides, lesson plans and so on).

CiviCRM's range of functionality can be overwhelming at first (especially to the less technically-minded). Remember that staff who were not involved in the project's early stages will need to have concepts explained clearly to them - things that are obvious to you may be quite foreign to others.

Trying to cover everything in one training session probably won't be effective; your staff will need time to digest the new ideas. Instead, hold smaller training sessions that introduce concepts and specific functionality, followed by periods of testing, piloting and feedback. Tailor your training for your audience: not everyone needs to sit through a two-hour training session on how to manage events if there is a single person responsible for event management and planning. And where possible, involve staff in training other staff members as this increases the sense of ownership and helps to embed learning.

Training is also ongoing. New staff will need to be trained, users familiar with the system can benefit from learning about more advanced topics, and staff will need further training when there are significant upgrades or new functionality added. If you plan to use CiviCRM for any large or mission-critical events, allow adequate time for additional staff training and testing.

HOSTING AND INFRASTRUCTURE

Hosting is a key aspect of any CiviCRM project. You will need to provide maintenance of the server on which CiviCRM is stored, and have someone available to fix problems that inevitably occur from time to time. If your site needs to be accessible 24 hours a day, you should have a support agreement with your ISP that covers this. Ensure that your budget is sufficient for appropriate hosting, and that effective backup procedures and policies are in place.

Keep in mind that in the hosting provider world, you get what you pay for. In many cases, cheap hosting providers keep their prices down by limiting the services or flexibility they provide. CiviCRM doesn't work well on poor hosting, and under-budgeting for hosting may lead to other problems. Similarly, make sure that the computers your staff are using are powerful enough to provide a good experience with CiviCRM.

CHANGE MANAGEMENT

Introducing a new (or the first) CRM will cause changes in work flow and processes at your organisation. These changes may be "political", practical or technical. Either way, a lot of change at the same time can be difficult and stressful.

To mitigate this, give staff time to accept and support each change so that they share in ownership of the new system rather than feeling as if something has been forced on them. Focus on simple tasks at the beginning of deployment and introduce more difficult tasks as staff understanding of the system grows. Show staff how the new system will make their work easier and where their feedback has been incorporated.

Good planning can minimise the risks around change, but it is important to be flexible within your plan; unforeseen things often occur, and a rigid plan could prevent you from reaching the best solution.

BASIC SET-UP

- 7. INSTALLATION & BASIC SET-UP
- 8. EMAIL SYSTEM CONFIGURATION
- 9. TAKING CARE OF SECURITY

7. INSTALLATION & BASIC SET-UP

Before reading further, please be aware that much of the information contained here is intended for technicians and may be difficult to understand if you have little or no experience in setting up web applications. If you don't understand this topic, you may wish to either seek help, or point your organisation's technical staff to this material.

PREREQUISITES

CiviCRM must be installed on a computer that has been configured with a web-server (such as Apache or ngx), PHP 5.2 or later, and MySQL. Some people prefer to try out CiviCRM on their own local computer before installing it on a dedicated web-server. If you are doing this and don't have the per-requisites just mentioned, you can download packages from the Internet such as WAMP, XAMPP, MAMPP and LAMP, which will quickly install an Apache web server, PHP, and MySQL. (The first two packages are for Windows and the second two are for the Macintosh and Linux respectively).

Before you can begin installation, you need to decide whether you are going to use CiviCRM integrated with Drupal or Joomla!. Refer to the appropriate section in the online CiviCRM Installation Guide for the latest system requirements and specific installation steps:

<http://wiki.civicrm.org/confluence/display/CRMDOC/Installation+and+Upgrades>

NETWORK ACCESS

Once you are ready to start using CiviCRM in your organization, you'll probably want CiviCRM to be available on the Internet. However, some organizations only want internal staff to have access. In this case they may choose to install CiviCRM on an intranet or local area network.

UPGRADES

New versions of CiviCRM are released two or three times a year, and you will need to apply upgrades to your CiviCRM site periodically in order to take advantage of new features and improvements. Some upgrades contain security fixes and it is crucial that these are applied in a timely manner. It's important that you plan for the resources (people and time) required to apply upgrades to your site. You need to plan on testing upgrades on a copy of your live site to make sure the process runs smoothly. It's also critical to make backups of your site and database prior to running an upgrade on your live site even if you had tested the process on a test site.

Refer to the appropriate section of the online CiviCRM Installation Guide for specific upgrade procedures. Be sure to select the procedure that is targeted for the **environment** you are running (Drupal or Joomla!), and the version you are upgrading to.

CONFIGURATION

Now that you have CiviCRM installed and running on your web-server, it's time to review the initial configuration tasks which allow you to customize CiviCRM for your organization.

You can easily access each of the configuration screens described in the following screen from the Configuration Checklist. Log in to your CiviCRM site and navigate to **Administer CiviCRM > Configure > Configuration Checklist**. This section will cover the general tasks, while component-specific configuration will be covered in each component section.

Site Configuration	
Localization	Localization settings include user language, default currency and available countries for address input.
Domain Information	Organization name, email address for system-generated emails, organization address
Viewing and Editing Contacts	
Site Preferences	Configure screen and form elements for Viewing Contacts, Editing Contacts, Advanced Search, Contact Dashboard and WYSIWYG Editor.
Address Settings	Format addresses in mailing labels, input forms and screen display.
Mapping and Geocoding	Configure a mapping provider (e.g. Google or Yahoo) to display maps for contact addresses and event locations.
Miscellaneous	Contact search behaviors, RECAPTCHA configuration.
Sending Emails (includes contribution receipts and event confirmations)	
Outbound Email	Settings for outbound email - either SMTP server, port and authentication or Sendmail path and argument.
From Email Addresses	Define general email address(es) that can be used as the FROM address when sending email to contacts from within CiviCRM (e.g. info@example.org)
Online Contributions / Online Membership Signup / Online Event Registration	
Payment Processors	Select and configure one or more payment processing services for online contributions, events and / or membership fees.
Permissions for Anonymous Users	You will also need to change Drupal permissions so anonymous users can make contributions, register for events and / or use profiles to enter contact information. (learn more...)

LOCALIZATION

Localization involves adapting CiviCRM for use in a specific country or language by translating the text displayed on the screen and setting region specific formats for dates and money (including currency). By default, CiviCRM is localized for the United States. If you are using CiviCRM in a different country, need to store contact addresses that appear in countries other than the United States, or want to use CiviCRM in another language, you will need to review and update the values on this screen.

CiviCRM has been translated into a number of different languages. These translations are contributed by community members. So your first step is to determine if a complete translation exists for the current version by visiting the Translation Server home page at <http://translations.civicrm.org/>. If you find a completed translation, you can download it and select it on this screen. Otherwise you will need to consider whether you have resources for contributing a translation.

It is also possible to configure your site to support multiple languages. In this mode, your users will be able to choose from a list of available languages after logging in. You can also create and store multi-language versions of text. Examples include custom field labels, an online contribution page, campaign information, and event descriptions.

Further reading:

Localization overview - <http://wiki.civicrm.org/confluence/display/CRMDOC/CiviCRM+Localisation>

DOMAIN INFORMATION

Use this screen to enter identifying information for the organization or entity which "owns" this CiviCRM installation. The organization name and address are used to identify your organization in CiviMail mailings when you include the domain.name and domain.address tokens.

You should also enter a valid email address belonging to your organization, which will be used as the From field in system-generated (automated) emails.

SITE PREFERENCES

This screen allows you to modify the screen and form elements for the following tasks:

- **Viewing Contacts** - Controls the tabs displayed when viewing a contact record.
EXAMPLE: If your organization does not keep track of Relationships, deselect this option to simplify the screen display. Tabs for Contributions, Pledges, Memberships, Events, Grants and Cases are also hidden if the corresponding component is not enabled.
- **Editing Contacts** - Controls the sections included when adding or editing a contact record. EXAMPLE: If your organization does not record Gender and Birth Date for individuals, then simplify the form by deselecting Demographics.
- **Contact Search** - Controls the sections included in the Advanced Search form.
EXAMPLE: If you don't track Relationships, you will not search for that section. Simplify the form by deselecting this option.
- **Contact Dashboard** - Allows your constituents to view the groups they are subscribed to, their contribution history, event registration information and more. You can control the sections that should be included in the dashboard here. EXAMPLE: If you don't want constituents to view their own contribution history, deselect that option.
- **WYSIWYG Editor** - The editor provided to users to enter text in fields that allow HTML formatting (such as the introductory section for your online contribution pages). You can choose either CKEditor or TinyMCE. It's a good idea to try out both and see which is more comfortable for you and your users.
- **Individual Display Name** - Display name format for individual contact display names.
- **Individual Sort Name** - Sort Name format for individual contact sort names.

ADDRESS SETTINGS

CiviCRM allows you to modify the default fields for adding and editing contact and event address data. You can also change the address field layout used for screen display and mailing labels. Review the out-of-the-box defaults by adding a new contact record and noting the address fields provided on the form. Save the record and note the order in which the fields are displayed on the Contact Summary screen. If you plan on generating mailing labels for contacts, review the label layout (select Mailing Labels from the *-actions-* drop-down after doing a search using the Find Contacts menu option).

After reviewing the default fields and layouts, review the Address Settings screen and make changes as needed.

- **Mailing Labels** - Controls formatting of mailing labels here. The default format is:
`{contact.addressee}
{contact.street_address}
{contact.supplemental_address_1}
{contact.supplemental_address_2}
{contact.city}{, }{contact.state_province}{ }{contact.postal_code}{contact.country}`
You must include the `{contact.addressee}` token here in order to include the name of the addressee in your labels. Users will be able to select from a variety of label types corresponding to the label manufacturer code when they generate the labels from a list of contacts. It's a good idea to test your format with the type of label and printer you plan on using to verify spacing.
- **Address Display** - Controls the layout of contact and event location addresses displayed on CiviCRM screens. The default format is:
`{contact.address_name}
{contact.street_address}
{contact.supplemental_address_1}
{contact.supplemental_address_2}
{contact.city}{, }{contact.state_province}{ }{contact.postal_code}{contact.country}`

This format applies to event locations, despite the use of the `contact` record type in the layout. The `{contact.address_name}` token is particularly useful for events where you need to include a location name (e.g. "Smithson Hall").

- **Address Editing Fields** - Modify the available address editing fields here. You can hide fields that you don't plan on using in order to simplify the forms. EXAMPLE: If you don't plan on recording OpenIDs for contacts, you can deselect that field.
 - **Street Address Parsing** - CiviCRM uses the US Postal Service's (USPS) Postal Addressing Standards to parse an address into fields to hold the address elements: Street Number, Street Name, and Apt/Unit/Suite. It's best to enter address information that conforms to the Postal Addressing Standards, not only for consistency in your data, but also to best take advantage of the the Street Address Parsing function. You can edit and or view the parsed address by clicking on Edit Address Elements next to the Street Address field of the Address Area of the Summary tab when viewing a contact record. You can learn more about USPS' Postal Addressing Standards at <http://pe.usps.com/text/pub28/welcome.htm>.
- **Address Standardization** - CiviCRM includes an optional feature for interfacing to the United States Postal Services (USPS) Address Standardization web service. You must register to use the USPS service at <http://www.usps.com/webtools/address.htm>. If you are approved, they will provide you with a User ID and the URL for the service. The URL provided by USPS will not be prefixed with "http://". When entering this URL into the CiviCRM settings field, you must prefix it with "http://".

MAPPING AND GEOCODING

CiviCRM includes support for both the Google and Yahoo mapping services. These services allow your users to display contact addresses and event locations on a map. To enable this feature, select your mapping provider and obtain a key for your site from that provider.

Once a mapping provider is enabled, your contact and event records will be automatically geocoded (the latitude and longitude for that address is inserted) as you add or edit address data.

SEARCH SETTINGS

These let you adjust search behaviors such as the use of wildcards and which data to include in quick search results. Adjusting search settings can improve performance for large datasets.

A wildcard character is a special character that can be used to substitute for any other character or characters in searches. CiviCRM allows you to use the percent (%) character to substitute for zero or more characters, and the underscore (_) character to substitute for any single character. Wildcards are useful for broadening your search results.

For example, typing 'Volunteer%' as your Activity Subject will match any record whose subject starts with "Volunteer" (e.g. "Volunteer for Open House" or "Volunteering Opportunities").

- **Automatic Wildcards** - By default, when users search for contacts by Name, the Search interface treats the text as if it was surrounded by percent signs. EXAMPLE: Searching for 'ada' will return any contact whose name includes those letters - 'Adams, Janet', 'Nadal, Jorge', etc. Disabling this feature will speed up searches significantly for large databases, but will make users explicitly use wildcard characters ("% " or " _ ") for partial name searches.
- **Include Email** - By default, when users search contacts by Name, the Search interface also searches for the text in email addresses. Disabling this feature will speed up searches significantly for large databases, but users will need to use the Email search fields (from Advanced Search, Search Builder, or Profiles) to find contacts by email address.
- **Include Nickname** - By default, nicknames are automatically *not* included when users search by Name. Change this value to Yes if you want nicknames to be included.
- **Include Alphabetical Pager** - If disabled, the alphabetical pager will not be displayed on the search screens. This will improve response time for search results on large datasets.
- **Include Order By Clause**- If disabled, search results will not be ordered. This will improve response time for search results on large datasets significantly.
- **Default Contact Search Profile** - You can select a Profile to override the columns displayed by default in Find Contacts search results.
- **Smart group cache timeout** - Smart groups are basically saved searches. The list of contacts for each smart group is cached in the database in order to avoid running the saved search every time you access a smart group. This field determines the number of minutes to maintain the cache before refreshing it. The default value of 0 means the cache is emptied immediately when any contact is edited or a new one is added. If your contact data changes frequently, you may want to try setting this to a value of 5 minutes (or even longer) to reduce processing load on your server. The drawback of delaying the refreshing of the cache is that old data will still be served up to users for a few minutes after new data is added.
- **Autocomplete Contact Search** - If enabled, selected fields will be displayed in auto-complete dropdown lists and the "Quick Search" box on the navigation menu. The contact name is always included.

MISCELLANEOUS: VERSION CHECKING, RECAPTCHA, USE TRASH, LOGGING

Use the Miscellaneous Settings screen to configure and control the following behaviors:

- **Dashboard Cache Timeout** - The number of minutes to cache dashlet content on the dashboard.
- **Contact Trash and Undelete** - If enabled, deleted contacts will be moved to the trash (instead of being destroyed). Users with the proper permission are able to search for the deleted contacts and restore them (or delete them permanently).
- **Logging** - If enabled, all actions performed on non-cache tables will be logged (in the respective log_* tables). By default, these tables will be created in the same database. However you can configure CiviCRM to write logging tables to a different database by editing your site's [civicrm.settings.php](#) file. Specify the separate logging database in the CIVICRM_LOGGING_DSN setting. After enabling this feature you can review changes to contact records using the Contact Logging Report. Go to Reports > Reports Listing > Contact Logging Report (Summary).
- **Version Checking and Statistics Reporting** - This feature automatically checks the availability of a newer stable version of CiviCRM. New version alerts are displayed on the main CiviCRM Administration page. Statistics about your CiviCRM installation are also reported anonymously to the CiviCRM team to assist in prioritizing ongoing development efforts. The following information is gathered: CiviCRM version, versions of PHP, MySQL and framework (Drupal/Joomla!/standalone), and default language. Record counts (but no actual data) are also reported. You can set this field to No if you are not comfortable with having this information reported for your site.
- **Attachments** - You can increase or decrease the maximum number of files (documents, images, etc.) that can be attached to emails, activities, and grant records. The default value is 3.
- **File Size** - Maximum size of a file (documents, images, etc.) which can attached to emails or activities. Note that your PHP configuration files, *php.ini*, should support at least as big a file size as the value specified here.
- **reCAPTCHA** - reCAPTCHA is a free service that helps prevent automated abuse of your site by requiring users to read a random pair of words and type them into the form. To use reCAPTCHA on public-facing CiviCRM forms, sign up at [recaptcha.net](#), enter the provided public and private reCAPTCHA keys here, then enable reCAPTCHA under the Advanced Settings section in a Profile where you want it used.

If you want to use reCAPTCHA protection for online contribution, membership signup or event registration forms, you'll need to configure a Profile with reCAPTCHA enabled, and then include it in those forms.

CONTACT TYPES

Here you can modify the names of the built-in contact types (Individual, Household, Organizations), and create or modify "contact subtypes" for more specific uses (e.g. Student, Parent, Team, etc.).

SENDING EMAILS

CiviCRM will use the default From address defined here when sending automated emails. If you've already entered an email address in the Domain Information screen, that address will be listed here (as illustrated on the leftmost field of the following screenshot).

Label	Value	Description	Order	Default	Reserved	Enabled?
"Client Services" <clientservices@example.org>	2	Use this for all general emails.	1	[x]	No	Yes

When users send an email using CiviCRM, their primary email address is used as the From address by default. However, they can also select one of the general email addresses defined here as an alternative.

Outbound email

If you are sending emails to contacts using CiviCRM, you need to enter settings which allow CiviCRM to connect to your mail server. Such emails include sending receipts to contributors, sending confirmations to people registering for events, and using CiviMail to send bulk mailings.

CiviCRM supports three different methods of connecting to a mail server: mail (the built-in PHP mail function); SMTP (Simple Mail Transport Protocol); and Sendmail. Each method requires that you enter specific settings. If you're unfamiliar with these terms, or unsure of the correct values for these settings, check with your system administrator, ISP or hosting provider.

You should always send a test email after you enter or modify the settings. Simply click "Save and Send Test Email"(shown in the following screenshot). An email will be sent to the email address associated with your user login account. The From email address will be the default From address you've configured in the previous section.



If CiviCRM is unable to send the test email, you will see a message on your screen with the specific error and some suggestions for trouble-shooting the problem.

Disabling outbound email

If you do *not* want users to send outbound emails from CiviCRM at all, select "Disable Outbound Email". However, if you disable outbound email, and you are using Online Contribution pages or online Event Registration, you will need to turn off the automated receipting and registration confirmation features (these are enabled by default). Otherwise your constituents will see error messages after they've completed a contribution or registration.

See **Email System Configuration** for more details.

PAYMENT PROCESSORS

Payment processors are companies that handle credit card transactions for merchants and non-profit organizations and that transfer funds to the organization's bank account. If you plan on using CiviCRM to accept online contributions, online membership signup and renewal or online event registration, you will need to select and configure a payment processor for your site.

CiviCRM includes support for several different processors, and provides a way for third-party developers to add support for additional processors based on their clients' needs. Each processor has their own pricing structure and features, and you will want to investigate each available option to determine the best fit for your organization. Refer to the "Contributions" section for a list of factors to consider in selecting a processor.

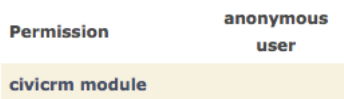
The actual steps involved in configuring and testing your payment processor connection are different for each processor. For more information, visit:
<http://wiki.civicrm.org/confluence/display/CRMDOC/CiviContribute+Payment+Processor+Configuration>

PERMISSIONS FOR ANONYMOUS USERS

Note: This section applies to Drupal sites only.

If you are using CiviCRM with Drupal, you will need to review Drupal's user permissions to ensure that people can get to your signup forms, contribution pages, membership pages and event registration pages.

You must be an administrator for your Drupal site to review and modify user permissions. Log in to your Drupal site, and navigate to **Administer > User Management > Permissions**.The following screen is displayed.



make online contributions	☒
profile listings and forms	☒
register for events	☒

Review each of the permissions listed. You should enable them for the anonymous user role if you want these features to be accessible to people who visit your site without logging in--outsiders registering for membership or events, for instance:

- **Make online contributions:**
If you plan to use CiviContribute and want to allow online contributions, enable this permission by checking the box.
- **View event info and Register for events:**
If you plan to use CiviEvent and want to allow online event registration, enable both of these permissions.
- **Profile listings and forms:**
If you want to collect contact information from constituents or expose a searchable directory using a profile, you must enable this permission.
- **Access all custom data:**
You must enable this permission for any role which you want to view or for which you want to edit custom data fields. This permission sounds like one that should be given out with care, but in reality most sites give this permission to anonymous users because it is required for simple tasks like filling in information about themselves in the data fields you include in the event registration process. If your site uses Profiles that include custom fields, make sure the roles that need to access these Profiles have this permission.

Now that you have reviewed all the basic configuration tasks, you're ready to begin exploring the ways in which you can record and use contact data.

SYSTEM WORKFLOW TEMPLATES

Review and modify the templates used for system-generated emails, including contribution receipts and event registration confirmations.

8. EMAIL SYSTEM CONFIGURATION

This chapter covers system configuration necessary so that CiviCRM can send and receive email. This is a complex task which requires system administrator level skills. Correct configuration is crucial to keep your server off spam lists and black lists. See Set Up of the Email section for tasks necessary to set up the sending of messages once the server settings have been configured.

Some parts of the configuration are core CiviCRM functionality (basic sending and receiving of emails) whereas others (mass mailings) require that the CiviCRM component be enabled.

You will need to be able to change the configuration of your DNS, create email accounts, configure a cron job, read the headers of email messages, and possibly change the configuration of your SMTP server.

This chapter assumes you are running CiviCRM on a Linux server and that you are comfortable working with the shell and running some simple commands. Most of these steps will be similar on other operating systems, but you will need to adapt them to your system and tools.

The configuration described works fine for mailings to up to about 10,000 people. If you plan on sending email to hundreds of thousands of contacts, you should benchmark several options and consider a dedicated SMTP server. This more complex configuration is outside the scope of this book.

In this chapter we'll use an external Gmail mailbox address to test configuration. So the first step is to create a Gmail account if you don't have one already; alternatively, you can use another address for testing the procedures in this chapter, but you will need to be able to view the source of the mails you receive.

Once your system is properly configured, you are going to run periodically (for instance every 10 minutes) two different programs:

- *EmailProcessor.php* to check if you have received new bounces, and flag the invalid contacts
- [civimail.cronjob.php](#) to send all the emails that might be queued for sending.

CONFIGURING OUTBOUND EMAIL

Outbound email setting are configured at: **Administer > Configure > Global settings > Outbound Email**. The choices here are:

- mail(). This is the default option and if it works for you, you should use it.
- SMTP. If you have a dedicated external mail server, specify its details here. Bounce messages generated with SMTP are slightly more complete than the ones from mail(), but there is no practical benefit to using SMTP if you can use mail().
- Sendmail. This option is kept for compatibility with older CiviCRM versions.
- Disable Outbound Email. Works as expected.

After making a choice, send a test email to your account on Gmail and verify that you receive it.

If you receive the following error message, you'll need to configure a default FROM email address (covered in the chapter on CiviMail configuration).

Sorry. A non-recoverable error has occurred.
The site administrator needs to enter a valid 'FROM Email Address' in Administer -> Configure -> Domain Information. The email address used may need to be a valid mail account with your email service provider.

Once you have received the email, you will need to view the source. This is done in Gmail by clicking on "Show original" in the email you receive.

The email should contain headers that resemble the following.

Received: from yourmailserver.example.org (xxx.example.org [12.45.120.30])

```
by mx.google.com with ESMTP id e31si4519230wej.3.2010.04.26.00.38.16;
Mon, 26 Apr 2010 00:38:17 -0700 (PDT)
Received-SPF: pass (google.com: best guess record for domain of
youremail@example.org designates 12.45.120.30
as permitted sender) client-ip=12.45.120.30
```

In particular:

- The "Received: from" header should correspond to your mail server and be properly configured. It might contain information about your hosting provider instead of your domain name. This is not a problem as long as the mail server is properly configured. If you have a dedicated IP address for your server, you should try to configure a reverse DNS that represents your organisation instead of the default name.
- The "Received-SPF" header should list "pass" or "neutral". Sender Policy Framework is described later in more detail.

Sending mass mailing is resource intensive. We don't recommend sending email messages from budget hosting providers. The time you will spend troubleshooting will often cost more than upgrading to a more professional host. Check with your hosting provider to find out whether they limit the number of email messages you can send and whether they run PHP in safe mode.

Some of your recipients' mail servers use DNS based blacklisting services (DNSBL) which keep a blacklist of IP addresses likely to send spam. Mail from these servers will be flagged as spam and not reach its intended destination. If your server is blacklisted (for instance, because enough of your recipients flagged your email as spam, or because another website on your server has been flagged as spam), you will need to contact the organisations that have blacklisted you and convince them to unlist you.

There are several websites that help you testing whether you are in a DNSBL. A web search for "blacklisting email" will turn some up. Test regularly to find whether you are on a blacklist.

CONFIGURING SENDER POLICY FRAMEWORK (SPF)

By default, the Internet allows any mail server to send any email claiming to be from anyone. This makes it easy for spammers to forge addresses and send spam using your email address (or any other). SPF allows you to create a special DNS record listing the IP addresses of the mail servers that can legitimately send email from @yourdomain.org.

If your domain name already has an SPF record, make sure that it includes the IP address of your CiviCRM mail server (which might be a different from the host used for the web server or from your mail servers), and if it doesn't, add this IP address.

If you don't have an SPF record, consider adding one. You will need to add at least your mail server and CiviCRM server (if they are different) to the SPF record.

You can read more about SPF at <http://www.openspf.org>.

CONFIGURING INBOUND EMAIL

This section explains the configuration of the handling of incoming emails for 1. handling bounces or 2. autofiling emails.

Bounces

CiviCRM can automatically receive the bounced email notifications and flag your contacts accordingly. Based on the type of errors (mail server is unreachable, mailbox full, mailbox doesn't exist, dns error...), CiviCRM will either directly set the contact as on hold or wait until several mailings are bounced with the same error for the same contact.

You need to set up two things: a mailbox to receive bounced email messages, and a cronjob that will read periodically this mailbox, and update your contacts and your mailing reports in civiCRM.

The bounce email address is an "invisible" email address visible only in the email message's envelope (hidden fields that precede the headers and message added by the user). Choose any name you like that is meaningful to you. In this example we have chosen *return*, so the email address we need to set up on a mail server for example.org is *return@example.org*.

Verify that your account is properly set up by sending a test email from Gmail to the return account.

CiviCRM handles bounces as follow: for each email sent, a new unique "invisible" sender address is created using the variable envelope return path (VERP). When CiviCRM receives a bounce, it looks at the invisible sender address to decide which email bounced. Contacts will be marked as on hold when their email bounces. Further messages to those addresses won't be sent.

Autofiling emails

CiviCRM can automatically retrieve email from a specified inbox and file it as an email activity against contacts corresponding to sender and recipients of the email. New contacts are created for emails not already in the database.

There are two ways to do this that can be used one or both at the same time.

Option 1) Set up a special email address for your organization, e.g. `civiemails@mysite.com`. Users can then add this address in the Bcc field for your outbound emails they will get autofiled in CiviCRM as described above. No one who receives the email will see this special address if the Bcc field is used.

Option 2) Set up a folder in your IMAP Inbox where you can drag emails that you want filed in CiviCRM. This works with both inbound and outbound emails. (Option 2 requires that your email be set up using IMAP.)

See the wiki page for further emails

<http://wiki.civicrm.org/confluence/display/CRMDOC40/Autofiling+email+activities+via+EmailProcessor>.

Types of email accounts for incoming email

There are several ways of configuring your bounce mailbox:

- **Sub-addressing:** Your mail service might allow you to append a *+tag* or *-tag* qualifier to your e-mail address (e.g., `return+test@example.org`). Several mail servers, including Gmail, Yahoo! and Postfix provide this sub-addressing by default.

Try to send yourself an email, adding a *+tag* or *-tag*. If you received the mail you sent with a tag, it means that you can directly use the mailbox you created (`return@example.org` in our example) as the VERP.

- **Catch-all address:** If sub-addressing doesn't work on your mail server, you need to define the mail account you created (`return@example.org`) as the "catch-all" account. Every mail sent to an address that isn't a real mail account will end up there, including all the bounced email messages.
- **External address:** If neither of the preceding methods works, consider creating a new account on a service such as Gmail and use it to receive the bounced emails. You will have to set filters in this account so it doesn't discard as spam all the bounced email it will receive.

Adding an incoming email account for handling bounces or autofiling to CiviMail

Once you have created your email account to receive bounces or emails for autofiling, you need to set up CiviMail so it knows how to read it: **Administer > CiviMail > Mail accounts** as the default email address.

- Specify the mail **server**, **username**, and **password** you used when creating the account.
- The **local part** is the account you created with '+' appended, e.g., "return+".
- The **email domain** is the domain of your email address (example.org).
- You can leave the **return path** empty.
- If your mail server supports it, specify IMAP **protocol** and check **SLL**, otherwise use POP.
- You can specify an IMAP folder in the **source** field using the syntax INBOX.CiviMail. **Note:** Some exchange servers may not be configured in a compatible way. In that case, you can configure a script like fetchmail and use Maildir.
- In the **Used for?** field you can choose whether you want to use the email account for **Bounce Processing** or **Email-to-Activity Processing** (or Autofiling). You can have multiple accounts specified for autofiling but only one for bounce processing. This will be marked as default.

Once the **Bounce Processing** mailbox is configured, you will need to configure CiviMail to empty it, read all these bounced messages and identify the related bounced contacts. This is performed by the *bin/EmailProcessor.php* program. We recommend testing the bounce process by running this program directly before setting up CiviCRM to process the bounced email messages automatically. For instance, try entering the following URL into a browser to test the program, substituting the details for your invisible email account:

```
http://example.org/sites/all/modules/civicrm/bin/EmailProcessor.php?
name=username&pass=password&key=your_site_install_key
```

Read the chapter on cron for the details of these parameters.

If CiviCRM can't properly connect to the mailbox, it displays an error message:

```
ezcMailTransportException: An error occurred while sending or receiving mail.
```

followed by some extra information about the precise problem, such as:

- Failed to connect to the server
- The POP3 server did not accept the password: -ERR [AUTH] Username and password not accepted
- The IMAP server did not accept the password: -ERR [AUTH] Username and password not accepted

Once you have verified that CiviCRM can properly handle the bounce, you can set it up to automatically process the replies and bounces on a regular basis.

The different options to set up this periodical task are described on the [Scheduling the job](#) section below.

CONFIGURING CRON JOBS FOR SCHEDULED MASS MAILINGS

Mass mailings are generated via the web interface and queued to be sent by a background cron job, a process that periodically checks whether there are any mailings waiting to be processed. The program that cron runs is *bin/civimail.cronjob.php*. This section explains how to schedule it to run on a regular basis

If you need to send some email from CiviCRM right away, without waiting for the cron job, you can trigger the sending process by visiting the <http://example.org/civicrm/mailing/queue&reset=1> URL. Use this capability sparingly. It could utilize a lot of server resources and cause CiviCRM to slow down noticeably. The administrative settings for sending email are usually configured to minimize the load on the server, and the cron job is a more efficient way to send mass email.

Scheduling the job

To handle both outgoing email and bounced email, you should run a process several times an hour. On Linux and other Unix or Unix-like systems, this is done by configuring a cron job.

The cron job needs to run using an account recognized by your Drupal or Joomla! server. Create an account dedicated to this task (e.g., *mailprocess*), give it a long, secure password (e.g., *seol-lzprm42amv-psyc*) and grant it access on

CiviCRM and CiviMail. Do not change the account password without changing the password in the configuration files of this cron job.

To set up your cron job, you need to understand how cron works specifically on your CiviCRM server. But as example of setting up cron, you can log in as your dedicated cron user and type the following in the shell:

```
crontab -e
```

and then enter the following line:

```
* /5 * * * * php absolute_path_to_civimail.cronjob.php
```

Press CTRL-D to save the job and exit crontab. This example runs the PHP file every five minutes.

The *civimail.cronjob.php* program has two modes: one for running the file directly from the shell and one for loading the program from the web server. Use the direct shell method whenever you can. But if for technical reasons (not enough access rights, non-working php-cli, etc.) you can't run the programs from the shell, use the web server method.

From the shell

First, find out whether php-cli is installed. From the shell, type *php -v*. If you see (cli) in the result, as in:

```
PHP 5.2.3-1ubuntu6.5 (cli) (built: Feb 11 2009 19:55:53)
Copyright (c) 1997-2007 The PHP Group
Zend Engine v2.2.0, Copyright (c) 1998-2007 Zend Technologies
    with eAccelerator v0.9.5.3, Copyright (c) 2004-2006 eAccelerator, by eAccelerator
```

This means you have php-cli installed and you should use it, because it has several advantages:

- You can run a PHP script at a lower priority than your web server, so that even if it takes a lot of CPU, it won't interfere with the regular users of your site.
- You can set different memory limits for the php-cli process and the PHP process used by your web server.
- You avoid the overhead of the web server and the HTTP layer.
- You won't have any timeout problems.

The following is complete cron configuration to handle CiviCRM's mail requirements:

```
# This must be set to the directory where civicrm is installed.
CIVI_ROOT=/var/www/civicrm
USER=www-data
MAILTO="you@example.org"
# Location of the PHP Command Line Interface binary. nice -19 forces to run at a
lower priority than the web server
PHP=nice -n19 /usr/bin/php

#line to be modified according to the informations below
PARAMS= -sdefault -umailprocess -pseol-lzprm42amv-psyc
#cronjob send
# m h dom mon dow    command
*/5 * * * * cd $CIVI_ROOT;$PHP bin/civimail.cronjob.php $PARAMS
*/15 * * * * cd $CIVI_ROOT;$PHP bin/EmailProcessor.php $PARAMS
```

The user that run the scripts (*www-data* in this example) needs to be able to write into the temporary folder. Your configuration might specify a different user.

You don't have to run both scripts at the same frequency. The preceding crontab file verifies every 5 minutes whether mail messages need to be sent, but only every 15 minutes whether bounced email needs to be processed.

PARAMS contains:

1. The site you used, which is **-sdefault** on Drupal. If you run multiple CiviCRM sites on a single server, you need to specify your site's domain, such as **-sexample.org**.
2. The user login account (**-umailprocess**).
3. The password you defined (**-pseol-lzprm42amv-psyc**).

From the web server

You can access the two processes from pages on your web server using commands such as:

```
wget -O - -q -t 1 --post-data='name=mailprocess&pass=seol-lzprm42amv-  
psyc&key=yoursiteinstallkey' http://www.example.org/sites/all/modules/civicrm  
/bin/civimail.cronjob.php  
  
wget -O - -q -t 1 --post-data='name=mailprocess&pass=seol-lzprm42amv-  
psyc&key=yoursiteinstallkey' http://www.example.org/sites/all/modules/civicrm  
/bin/EmailProcessor.php
```

This works like visiting the web pages in your browser, but can be run automatically as shell commands.

For security reasons, you need to add an extra **key** parameter, defined in your [civicrm.settings.php](#) file. Read the chapter on the REST interface for more information about this parameter.

9. TAKING CARE OF SECURITY

Because CiviCRM is a web based solution, it requires webserver to run. It's most common situation that webserver are used for serving publicly available data, so some attention is required, when setting up CiviCRM for storing sensitive data. Recommended approach in such situations is using some kind of VPN (Virtual Private Network) solution, which will encapsulate data transfers over public networks using secure cryptographic methods. One of non-complicated methods of assuring VPN functionality is using SSH tunneling - blocking most kinds of access to the server and leaving only possibility to access services via secure, encrypted SSL tunnel.

ENCRYPTED DATA TRANSFER

CiviCRM, being server based software accessed through the browser (client), requires internet connectivity. All the communication that's happening between the server and the client is not encrypted by default in non-configured, default installation, which means that somebody can intercept it and gain unauthorised access to your CiviCRM installation. In order to ensure security of communication, you need to make sure that your webserver (or hosting company) supports so called SSL (Secure Sockets Layer). Once that condition is met, you will need to create or obtain an SSL certificate from trusted issuer and put it on your server and then enforce encrypted communication (through HTTPS protocol) by changing configuration options in administration section.

BACKUPS AND THEIR SECURITY

All of the computer systems are prone to failures - both hardware and software. The way to make sure that data is not lost is creating backups - periodically made copies of all the data and sometimes software as well. Making backups serves two important purposes: recovery and retention. In case of recovery, it helps organisation make sure that data gathered and stored in databases isn't lost in case of any failure. It can also help make sure that service continuity is assured - sometimes it's important that data gathering or analysis operations are not ceased due to lack of functioning database system - in such cases recovering working tool from backup minimises downtime. Second purpose: retention, is useful when organisation needs to be able to check the state of data gathered in given time in past. It might be quite important for human rights oriented organisation, especially around projects where data gathering process can be sabotaged by introducing unneeded modifications. Being able to verify the state of database in given moment in time (and compare to current state) can help in discovering any inaccuracies.

There is one more important issue to remember about when thinking about data backups. It sometimes happens, that the backed up system itself is well protected and there is a lot of attention being paid to its security, but the very backup security is forgotten. For example, it's important to have off-site backups (a copy of data that's stored in physically different location than original data - in case of natural disaster or fire), but it should be remembered that they contain all of the sensitive data. Therefore, it's a good practice to use strong encryption and physical protection (e.g. keep them in safe) for all the backups.

DATA STORAGE JURISDICTION

As mentioned before, CiviCRM can be run from the server or from the cloud. When working with issues around human rights, or if an organisation is gathering sensitive information about a country's government or its officials, it is quite important to know where your data is stored. This is especially important when data is stored "in the cloud", when it's not obvious where the data is physically stored. Not getting into details, it might be good to have detailed information about where the servers are physically located, and which country's jurisdiction is used in case of governmental requests for information.

OTHER SECURITY CONCERNS

It should be remembered that many successful attempts of unauthorised access don't have too much to do with IT systems security. It's often social engineering, physical access to server and client machines or using violence against people who have authorised access to data that are responsible for break-ins. Therefore, making sure that data is secure requires also extensive, on-going training of system users and making sure that they are familiar with all the necessary precautions.

ORGANISING YOUR DATA

10. OVERVIEW

11. CONTACTS

12. GROUPS AND TAGS

13. ACTIVITIES

14. RELATIONSHIPS

15. CREATING CUSTOM FIELDS

16. USING CIVICRM PROFILE

10. OVERVIEW

This chapter covers the main building blocks that CiviCRM uses to store data, and describes their intended usage. It is recommended reading for working out how you should organise your data in CiviCRM.

Using CiviCRM successfully depends on having your data stored in the right place. The following is an introduction to how contacts are dealt with in CiviCRM, how CiviCRM stores data related to contacts by default, and how to add fields to store additional data. This chapter introduces the following concepts: Contacts, Relationships, Groups and Tags, Activities, Custom Fields, and Profiles. This should also help you to understand why you would store data in one place and not another.

CONTACTS

CiviCRM uses contact records as central hubs for data about your organisation's contacts. There are three distinct contact types defined in CiviCRM, each suited to a common type of contact your organisation may want to track:

- Individuals: any person your organisation wants to keep a record of
- Organisations: this could be another non-profit, a company, a chapter of your organisation, or a committee. You will generally want to create at least one contact of the Organization type to represent your organisation. This is particularly useful when you are configuring memberships
- Households: a family or group of people who share a physical location

CiviCRM provides different fields for each contact type, according to the different kinds of data you will probably want to track. For example, gender only applies to individuals, not organisations or households, so the gender field is only available for Individual contact types and subtypes. You can also define additional data that you want to collect and apply it to only one type. You could choose to create a custom data field to record the Chairperson or CEO's name and only apply this field to organisations.

RELATIONSHIPS

Relationships are a way to connect two contacts to each other. Two default relationship types in CiviCRM are the "employer - employee" and the "parent - child" relationship types.

There are always two ways to describe a relationship in CiviCRM: one describes the relationship of A to B, and the other of B to A. For example, Adam is Bernard's son and Bernard is Adam's father. Sometimes both descriptions will be the same: Charlie is Diane's friend and Diane is Charlie's friend.

CiviCRM comes with a number of relationship types in the standard installation. You can define further relationship types to meet your needs, for example you might define a relationship type of "vicar - church".

It may be helpful to compare relationships to groups: relationships connect two contacts, while groups contain two or more contacts who have something in common.

GROUPS

Groups are useful to identify two or more contacts with something in common. For example, the advisory board of your organisation could be modeled as a group.

Groups are often used as mailing lists. For example, you could create a group containing all your newsletter subscribers, then use the group to send an email newsletter.

Groups are also used in many other situations. For example, a search can be saved as a group (known as a smart group) which means that it will automatically update as more/fewer contacts match the search criteria as you put updated information in your database.

Groups can also be used to provide permissions in Drupal. To find out more about groups and how they are used, read the chapter on groups and tags.

TAGS

Tags are in many ways similar to groups, but as well as being used to identify contacts they can also be applied to activities and cases that have something in common. To find out more about tags, and how they are different from groups, read the chapter on groups and tags.

ACTIVITIES

Activities are a key concept in CiviCRM. Activities track interactions between the organisation and its clients or contacts at a specific point in time. While all of CiviCRM's components make extensive use of activities, such as recording contributions, event attendance, membership subscriptions, and emails, you can also create additional activity types to define specific activities that your organisation carries out, for example, **training**, **review**, **support** etc.

Custom Fields

CiviCRM makes it possible to collect and track information beyond what's possible with the default set-up.

According to your organisation's needs, you might want to add additional fields than those present in CiviCRM. For example, as part of your event management process, you might need to enter information about dietary preferences for participants. CiviCRM lets you add custom fields to collect this data and associate it with participant records.

Read the chapter in this section on Custom Fields for more detailed examples and information on how to add them.

PROFILES

CiviCRM allows you to pull together sets of fields for different purposes, and help you reduce the amount of time staff spends on administrative tasks. These sets of fields are known as profiles.

A few examples where profiles are necessary include the following: collecting information or letting people join your mailing list via online forms, facilitating event registration and getting everything you need to know from registrants, or creating data entry screens for volunteers with ONLY the fields that volunteers should see.

Read the Profiles chapter in this section for detailed information about how to make use of profiles.

CIVICRM COMPONENTS

In addition to these basic building blocks, CiviCRM provides what are known as components to help streamline administrative tasks related to event management, membership, sending communications, receiving contributions and donations, case management, conducting campaigns, administering grants programs, and more.

Each of these components is covered in a separate section of this book. The components are CiviEvent, CiviMember, CiviMail, CiviContribute, CiviCase, CiviCampaign, and CiviGrant.

The sections on Survey, Petition, and CiviEngage (the latter is actually a Drupal module) relate closely to CiviCampaign and their special functionality is described in the respective chapters.

There is also a separate reporting section related specifically to using reports and doing analysis on your data for ongoing evaluation of your work.

11. CONTACTS

Contacts are the main building block of CiviCRM. There are three types of core contacts by default in a standard installation:

- Individuals: any person your organisation wants to keep a record of
- Organisations: this could be another non-profit, a company, a chapter of your organisation, or a committee. You will generally want to create at least one contact of the Organization type to represent your organisation. This is particularly useful when you are configuring memberships
- Households: a family or group of people who share a physical location

Each contact record holds contact information, including:

- name, nickname, greeting, title
- website, email addresses, phone numbers, IM account name
- addresses
- communication preferences (which methods do they prefer being contacted by, and which methods do they not want to be contacted by).

All of the other building blocks of CiviCRM such as relationships, contributions and groups are connected to contacts in some way, so you can see events that a contact has attended, or what contributions they have made.

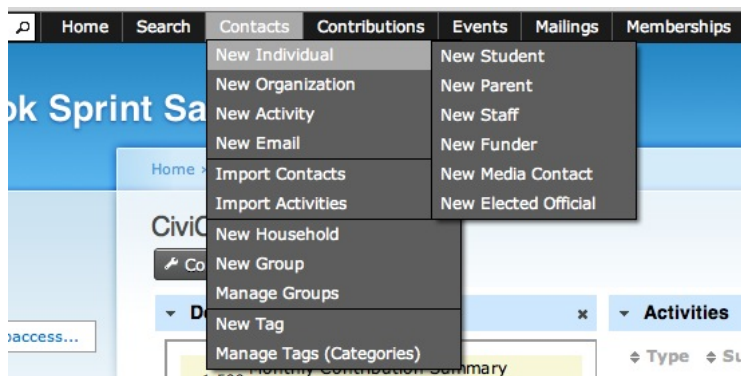
You can define further **contact types** to suit your needs, for example "students", "farms" or "churches". Each contact type you define is based on one of the three core contact types. For example, students would be based on the individual contact type, and farms could be based on the organisation contact type, or perhaps on the household contact type, depending on your situation.

A contact can be only one contact type. For example, they can't be a student and a teacher (but contact types are not the only way to differentiate your contacts).

All users of your content management system are also stored in CiviCRM as individuals. Their contact record in CiviCRM is linked to their user record in the CMS (Drupal or Joomla!). Note that only individuals can be linked to user records in your CMS. Organisation and household records in CiviCRM cannot be directly linked to user records in your CMS.

ADDING A CONTACT

The simplest way to add a single contact to CiviCRM is to use the navigation menu at the top of any non-public page. To create a new Individual, go to: Contacts > New Individual:



Note that the Contacts menu item allows you to create every kind of contact and contact sub-type.

Clicking on New Individual will bring you to the New Individual form. All of the contact creation forms are similarly arranged, with basic information (name, email etc.) at the top of the form and more specific fields below grouped by type or subject in accordions (such as address fields, communications preferences and any custom fields that you have added for the contact type).

You can fill out as many of these fields as you like, however it's recommended that you have at least a name and email address (it is only required that you have first and last name OR email address). Remember that there is no difference between the contact add and edit screens, so you can always go back and make changes as needed.

Once you have filled out the form, you have the choice of three buttons to click:

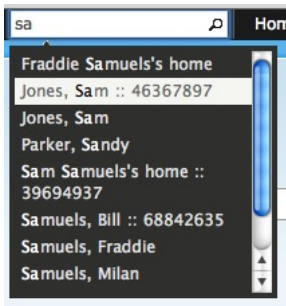
- Save will save the contact record and take you to the contact screen.
- Save and New will save the contact and clear the form so that you can add another.
- Cancel will discard the entered information and return you to your CiviCRM dashboard.

THE CONTACT SCREEN

The best way to understand contact management is to have a look at the different screens that are used to store and display information about contacts.

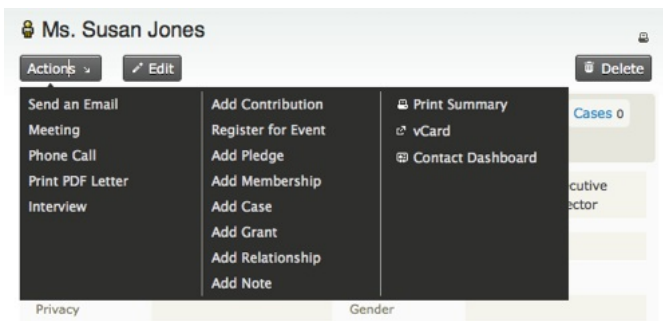
You can find a contact from your CiviCRM dashboard (or any other CiviCRM page) by entering part of their name or e-mail address into the Quick search box in the navigation menu. If you leave the search box blank and click the Search button, it will find all the contacts in your database.

Below is a search for "sa" that has returned Sam Jones, as well as other contacts with the letter combination "sa":



CONTACT ACTIONS RIBBON

Across the top of all contact records is an Actions Ribbon with a variety of buttons that allow you to perform actions related to the current contact. Clicking the Actions button will produce a dropdown menu with a number of actions that can be performed on this contact. For example, you could add a note to this contact, or record a new contribution, meeting or other activity.



Some of the activities you can perform here are:

- To change any information about this contact, go to the editing screen by clicking the Edit button. There is also a button to Delete the contact.
- Click Print Summary to go to a print-friendly view of this contact's information, ready for printing.
- The vCard link will import the contact's details into your email client (don't do this if you want your emails to this person to be recorded in CiviCRM).
- Click Contact Dashboard to access the the screen that allows users to view and modify their own group subscriptions, and see the history of their own contributions, memberships and event registrations.

If you're using CiviCRM in conjunction with Drupal or Joomla, you may also see a link to View User Record. This link is shown when the contact is a registered user of your site. It links to a CMS-specific User Account screen.

CONTACT TABS

A list of tabs underneath the Actions Ribbon break up the contact's information into related chunks. We will cover the contact summary tab here in some depth, and then look at other tabs that may be available to you depending on your configuration.

If you think that some of the tabs are not useful and will not be used in your deployment, you can disable or enable specific tabs from Administer > Global Settings > Site Preferences. If you don't see some of the tabs described below, you may need to enable them. The visibility of some tabs is dependent on which components are enabled in your installation. For example, the Contributions tab will be hidden if the CiviContribute component is disabled.

SUMMARY TAB

The summary tab gives you an overview of information about your contact. Here you will find names, addresses and contact details. The information on this page appears fairly straightforward, but take a closer look and you will find some pretty clever stuff is going on.

 Ms. Susan Jones

Actions

Edit

Delete

Summary

Contributions 2

Pledges 0

Memberships 0

Events 1

Activities 4

Cases 0

Grants 0

Relationships 2

Groups 1

Notes 0

Tags 1

Change Log 4

Contact Type

Individual

Employer

Eastmont Computing Center

Position

Executive Director

Tags

Major Donor

Work Email

s.jones@example.org

Work Phone

415 222-4011

Work Website

http://www.example.org

Work Address

Shared with:

Eastmont Computing Center

487E Northpoint Pl S

Attn: Accounting

Fulton, IN 46931

United States

Privacy

Gender

Female

Preferred Method(s)

Date of birth

February 2nd, 1982

Preferred Language

Age

29 years

Email Format

Both

Email Greeting

Addressee

Postal Greeting

Constituent Information

CiviCRM includes a complete set of fields "out-of-the-box" to store basic contact information. These are usually referred to as **built-in fields** and include:

- Name fields
- Job title and employer
- Phone numbers, email address(es) and instant messenger screen names
- One or more mailing addresses. If Map this Address appears above an address, you can bring up a map (either using Google Maps or Yahoo Maps, depending on your system's configuration) showing where this person lives. If it doesn't show on your screen, this feature hasn't yet been configured for your site. You can add map support from Administer CiviCRM > Global Settings > Mapping and Geocoding.
- Basic demographics (gender and birth date).

Note one small but important feature of the summary screen: if you have a number of long sets of fields, it may become useful to collapse some of them. In the example below, Communication Details has been collapsed, while Constituent Info - Individuals is expanded. Some field sets can be set to be expanded or collapsed by default. This happens for example when a contact has more than one location entered. The first one is shown by default, the rest of them will be collapsed. Clicking on the header will toggle the status of the field set.

▸ Communication Details	▼ Constituent Info - Individuals
	Constituent Type
	Other Name
	Staff Responsible
	Date Started
	How Started

Name Fields

Each contact's name can include the following fields: Prefix, First, Middle and Last Names, Suffix and Nickname. You don't have to use all of them, but they are available in case you want to store all of this information.

If you wish to record a prefix such as Mr., Ms. or Dr. for your contact you can do so using the dropdown menu on the edit screen. If you require other prefixes such as Sir or Father, you can add these to the dropdown menu from Administer CiviCRM > Option Lists > Individual Prefixes (Ms., Mr...). The same applies to name suffixes.

Locations

A location is a group of address-related fields consisting of phone, email and postal address field groups.

CiviCRM can hold more than one location for a contact. For example, if a person has a home address, a billing address and a work address, these can be recorded as separate locations. One of these locations will be marked as Primary. It will be used for any postal mailings that you do. You can explicitly choose which location will be primary for a particular person, or let it default to the first one entered. If a person pays you by credit card, the details used for Billing Address in credit card payments will be stored in the Billing location for the contact.

You can share addresses between contacts. For example, you may need to keep information about individual contacts and the organizations where they work. When creating or editing the "work" address for an individual, check the "Share Address With" box. If their employer already exists in your database, you can select them from the quick search box that appears. Otherwise, you can create the employer's organization record on the fly by selecting "New Organization" from the "create new contact" dropdown..

You can also store multiple phone numbers and email addresses for each location. One of these email addresses can be explicitly marked as the address which receives all bulk mailings (e.g. emails your organisation sends using the CiviMail component).

RELATIONSHIPS TAB

Relationships are connections between contact records in your database. Each connection can be named to describe the nature of the connection, and a contact may have many relationships to other contacts in the database. In the example below you can see a list of Current Relationships as well as a list of Inactive relationships. Contacts can have relationships with set start and end dates. For example, a contact could have a relationship "Committee Chair" to an organisation for a one year period. In order to track past Committee Chairs, you can keep a record of the contact having an inactive Committee Chair relationship.

SummaryContributions 0Memberships 0Events 0Activities 0Cases 0Relationships 3

Notes 0Tags 0Change Log 2Voter Info 0Grassroots Info 0School Information 1

+ Add Relationship

Current Relationships

Relationship	Start	End	City	State/Prov	Email	Phone	
Parent of	Bell, Lizzy						View Ed
Employee of	ABC Org						View Ed

Inactive Relationships

These relationships are Disabled OR have a past End Date.

Relationship	City	State/Prov	Phone	End Date	
Parent of	Bell, Isaac				View Edit

Another example of a relationship that might be tracked in CiviCRM is the Employee-Employer relationship. Richard is an employee of the organisation Acme Org, and to store this information in the database you can set Richard to be an "Employee of" Acme Org. You do this by creating a relationship between Richard and his employer. Once you do this, you will be able to see this connection from both Richard's and Acme Org's records.

The Employee/Employer relationship is a special one. If you look at the Summary tab again you can see that the Current Employer field shows the name of the employer. This name is a link to the ABC Org contact record. Entering in an Employer in this field is a shortcut way to define an employment relationship. Whenever you fill in the Current Employer field, a record with a matching name will be looked up and the appropriate relationship will be created. If no record for this organisation exists, one will be automatically created before creating the relationship.

The Household Member relationship is used for connecting individuals with households. When editing a contact, you can opt to "Share Address With" a household. You can either select an existing household, or create a new one by selecting "New Household" from the "create new contact" dropdown. When you have opted to use a household address for a contact, a link to the Household's contact record will be displayed along with the usual address information in the contact Summary tab. Using a household address for a contact also automatically creates the Household Member relationship between the contact and household.

Apart from the two special relationship types, you can create and register any other type of relationship. The Relationships tab shows all of a contact's existing relationships with other contacts (individuals, households or organisations in the database).

To create a new type of relationship, go to Administer CiviCRM > Option Lists > Relationship Types. Relationships can be also extended with custom fields if you need to store additional information for them.

Additional powerful characteristics of relationships include the ability to set a start and end date, or disable them manually if they are not valid anymore. This means that you can store the history of relationships in your contact records.

ACTIVITIES TAB

The Activities tab does two things. First, it displays all your interactions with the contact over time; this includes all CiviCRM's built-in activities like event attendance, contributions, membership sign-up and renewal, phone calls, emails and user-defined activities. Second, it allows you to record activities with contacts. Clicking on the icons at the top of the screen (Send an Email, Meeting, Phone call) will bring up a screen where you can enter those details.

This tab can also be used to record any custom activities that you've defined for your CiviCRM installation (from Administer CiviCRM > Option Lists > Activity Types). The ability to define custom activity types, and extend them with custom fields provides a powerful tool for tracking a wide variety of organisation activities. For example, you could choose to track activities such as press releases, press conferences, site visits or voluntary work.

Activities are a great way to store interactions that happen at a specific time, or that link specific people. If it is important for you to know who at your organisation carried out a task, then record it as an activity. Another advantage of activities is that they record when something has happened, which is useful if you need to report on the volume of activities performed during a specific time period. You can record an activity between a given contact and multiple other contacts by adding as many contacts as you like in the With Contact field on the Add Activity form.

Activities usually have their status set to Completed or Scheduled, however you may add other types of activity status as appropriate for your organisation.

Summary	Contributions 0	Memberships 0	Events 1	Activities 3	Cases 0	Relationships 2	G
Notes 0	Tags 0	Change Log 3	Voter Info 0	Grassroots Info 1	School Information 0		

- new activity - ▾

Activities							
↕ Type	↕ Subject	↕ Added By	With	Assigned To	↕ Date	↕ Status	
Event Registration	Rain-forest Cup Youth Soccer Tournament - December 27th, 2009 7:00 AM - Attendee - Registered	kurund@access.co.in			April 26th, 2010 12:19 PM	Completed	View File
Print PDF Letter		josue@ptp.org	Adams, Anne; Adams, Anne; Adams, James; Adams, Monica; Adams, Pat(more)		April 25th, 2010 6:13 PM	Completed	View Edit
Print PDF Letter		josue@ptp.org	Adams, Anne; Adams, Anne; Adams, James; Adams, Monica; Adams, Pat(more)		April 25th, 2010 6:10 PM	Completed	View Edit

CONTRIBUTIONS TAB

The Contributions tab shows any financial contributions made by the contact whose details you are viewing, as well as a summary of the contribution activity of the contact (total amount of contributions over time, total number of contributions, and average amount of contributions).

The Contributions tab also allows you to record off-line contributions using the Record Contribution button, or record a credit card transaction on behalf of the contact (useful if the contribution has been made by phone) using the Submit Credit Card Contribution button. Both of these buttons lead to forms that allow you to select the contribution type in addition to the normal contribution information collected from public contribution pages.

SummaryContributions 1Memberships 1Events 2Activities 8Cases 0Relationships 4Grassroots Info 0

Notes 1Tags 1Change Log 0Voter Info 0Grassroots Info 0School Information 0

Click [Record Contribution \(Check, Cash, EFT ...\)](#) to record a new contribution received from this contact. Click [Submit Credit Card Contribution](#) to process a new contribution on behalf of the contributor using their credit card.

Record Contribution (Check, Cash, EFT ...)

Submit Credit Card Contribution

Total Amount - \$ 10.00# Contributions - 1Avg Amount

Amount	Type	Source	Received	Thank-you Sent	Status	Premium
\$ 10.00	Donation	Online: Help CivCRM	March 8th, 2009		Completed	View

MEMBERSHIPS TAB

This tab displays the memberships a contact has signed up for. From this tab you are able to add memberships and submit credit card payments for memberships that require a fee. You can also renew or delete memberships from the "more" link on each membership in the contact's existing memberships.

SummaryContributions 1Memberships 1Events 2Activities 8Cases 0

Relationships 4Groups 1Notes 1Tags 1Change Log 0Voter Info 0Grassroots Info 0

School Information 0

Click [Add Membership](#) to record a new membership. Click [Submit Credit Card Membership](#) to process a Membership on behalf of the member using their credit card.

Add Membership

Submit Credit Card Membership

Active Memberships

Membership	Start Date	End Date	Status	Source
General	April 12th, 2010	April 12th, 2012	New	Payment

ViewEditmore

Renew

Renew-Credit Card

Delete

CivCRM ID: 92

Powered by CivCRM 27176. CivCRM is openly available under the [GNU Affero General Public License \(GNU AGPL\)](#).
[Download source.](#) [View issues and report bugs.](#) [Online documentation.](#)

EVENTS TAB

The Events tab displays events related to this contact, whether they are events the contact has registered for, attended, volunteered at or is any other of the user-configurable event statuses.

From this page you can register the contact for an event, and use the Submit Credit Card Event Registration button if the event requires payment. The related payment will then appear up on the contact's Contributions tab in the first row.

You can also modify the event information as it relates to the contact by clicking the Edit link. For example, you can change the contact's event status from "registered" to "attended".

SummaryContributions 1Memberships 1Events 2Activities 8Cases 0Relationships 4Groups 1Notes 1Tags 1Change Log 0Voter Info 0Grassroots Info 0School Information 0

This page lists all event registrations for Mrs Bruce M Jones Sr since inception. Click [Add Event Registration](#) to register this contact for an event. Click [Submit Credit Card Event Registration](#) to process a new New Registration on behalf of the participant using their credit card.

Add Event Registration

» Submit Credit Card Event Registration

Event	Fee Level	Amount	Event Date(s)	Registered	Status	Role	
Fall Fundraiser Dinner (participants)	Single	\$ 50.00	March 3rd, 2010 - March 5th, 2010	December 13th, 2009	Attended	Volunteer	View Ed
Rain-forest Cup Youth Soccer Tournament (participants)	Tiny-tots (ages 5-8)	\$ 800.00	December 27th, 2009 - December 29th, 2009	April 26th, 2010	Registered	Attendee	View Ed

GROUPS TAB

The Groups tab shows the groups that the contact is a member of. Groups can be used in a variety of ways including mailing lists and permissions (ACLs).

You can add and remove the contact from groups, and see a history of groups the contact has unsubscribed or been removed from.

The Status column displays who has added the contact to the group. Whether users can add themselves to a group is one of the settings you can configure when creating a group. When you set a group's visibility to "Public Listings" users can join via **Profile** forms. You may want to familiarise yourself with the discussion on using Profiles for mailing list sign-ups covered in a later section.

SummaryContributions 1Memberships 1Events 2Activities 8Cases 0Relationships 4Groups 1Notes 1Tags 1Change Log 0Voter Info 0Grassroots Info 0School Information 0

Current Groups

Group	Status	Date Added	
Newsletter Subscribers	Added (by Admin)	September 22nd, 2009 10:41 AM	[Remove]

Add to a group *

- select group -

Add

NOTES TAB

The Notes tab is a place where you can record random bits of information about a contact. Generally you would use custom fields for information you plan to collect about your contacts, but in some cases it may be useful to record additional, ad-hoc notes about a contact. Since this information is unstructured, you should be careful about using the Notes tab, unless you know that you or other people using your CiviCRM implementation will remember to look at that tab. When creating a Note both the subject and the content are free-text fields (i.e. the subject field does not have to be chosen from predefined options).

You can specify "Author Only" privacy for a note. This means that only the person who wrote the note, or someone with "view all notes" permission (Drupal only) can view or edit it.

49

[Summary](#)
[Contributions 1](#)
[Memberships 1](#)
[Events 2](#)
[Activities 8](#)
[Cases 0](#)

[Relationships 4](#)
[Groups 1](#)
[Notes 1](#)
[Tags 1](#)
[Change Log 0](#)
[Voter Info 0](#)
[Grassroots Info 0](#)

[School Information 0](#)

Add Note

Notes

Note	Subject	Date	Created By	
Connect for presentation		May 23rd, 2009	Inner City Arts	View Edit Delete

TAGS TAB

Tags are one way of categorising contacts in your database (other methods are Custom Data and Groups). You can configure which tags you wish to use for your organisation. You can search on tags and create Smart Groups based on them.

The tags next to Keywords are part of the Keywords Tagset. A Tagset is a specific grouping of tags that you can create. Tagsets are non-hierarchical, and you can create a new tag in a tagset simply by typing a new tag into the field. Existing tags that match what you type will also show up as a list from which you can select.

[Summary](#)
[Contributions 0](#)
[Pledges 0](#)
[Memberships 0](#)
[Events 0](#)
[Activities 0](#)

[Relationships 0](#)
[Groups 0](#)
[Notes 0](#)
[Tags 1](#)
[Change Log 1](#)

Tags

☒ Company
 ☐ Government Entity
 ☐ Major Donor
 ☐ Non-profit
 ☐ Volunteer

Keywords

key 1 X
 key 2 X
 key 3 X

CHANGE LOG TAB

This tab gives limited information about changes made to a contact record. It shows the change date and who made the change, but not what was changed.

[Summary](#)
[Contributions 1](#)
[Memberships 1](#)
[Events 2](#)
[Activities 8](#)
[Cases 0](#)
[Relationships 5](#)

[Groups 1](#)
[Notes 1](#)
[Tags 1](#)
[Change Log 2](#)
[Voter Info 0](#)
[Grassroots Info 0](#)

[School Information 0](#)

Change Log:

Changed By	Change Date
 kurund@web.com	April 27th, 2010 1:44 PM
 bob@scout.com	April 27th, 2010 1:44 PM

NOTE: Administrators can use the Contact Logging Report to get detailed information on changes to contact records (who, what and when).

MODIFYING THE CONTACT SCREENS

After working with the contact editing and summary screens for a while, you may realise that there are sections and/or fields that aren't useful for your organisation. The good news is that you can easily hide some fields and sections. For example, if your organisation doesn't need to store demographics information, you can remove it by configuring the Site Preferences:

- Log in to CiviCRM using an account with Administer CiviCRM privileges.
- Go to: Administer CiviCRM > Global Settings > Site Preferences.
- Uncheck the Demographics box under Editing Contacts.
- Click Save.

Similarly, if you want to remove (or add) fields in the postal address section:

- Go to: Administer CiviCRM > Global Settings > Address Settings.
- Check or uncheck fields under Address Editing.
- Click Save.

12. GROUPS AND TAGS

Groups and tags are two key methods of organising data in CiviCRM. When used properly, both allow for powerful segmentation and searching of your database.

Since both groups and tags are methods of categorisation, it can be difficult to determine whether a tag or a group is more appropriate in a given situation. Identifying the differences in their functionality will help you to decide which to use.

It can also be good to have a conceptual understanding of the differences between the two. Though there are different takes on how tags and groups should be used, a common philosophy is that tags should be used for descriptive categories and groups should be used for grouping people within an entity that needs to be treated like a cohesive unit (to send mailings to, for example). From this perspective, things like *volunteer*, *ally organisation*, *vegetarian*, and *musician* would be tags with which you could categorise contacts while *Volunteer Committee*, *Allied Organisations Coalition*, *Vegetarian Newsletter*, and *This Awesome Band With A Bad Name* would be groups to which you could add contacts.

GROUPS

Groups are an incredibly important feature within CiviCRM. In addition to their fundamental use as collections of contacts that have something in common, they play a critical role in CiviMail and Profiles, and can be used to set up advanced access rights (on Drupal). Well-defined groups are one of the most important tools available when segmenting your CiviCRM contact database.

There are two kinds of Groups - **Regular Groups** and **Smart Groups**.

- **Regular Groups** allows you to manually place contacts into a group. For example, you can manually assign your organisation's board members to a Board of Directors regular group. You can then easily send board-related emails to each person who is a member of the Board of Directors group without having to search through CiviCRM and select each member individually for the mailing.
- **Smart Groups** are automatically populated groups that are configured to include contacts that share a certain set of characteristics or activities. As contacts are added or edited, CiviCRM automatically checks them and adds them to Smart Groups if they meet the characteristics that you have configured. For example, you can create a Smart Group for "2010 Contributors from California" that includes contacts who have made a contribution in the year 2010 (an activity) and have an address in California (a characteristic). When new contacts located in California make a contribution in 2010, they are automatically added to this group. Another example is a Smart Group of all donors who have not yet been sent a thank-you letter. As you send your letters, the donors receiving them will automatically leave the smart group, allowing you to always have an accurate list to work from.

Group settings and functionality

Each group should have a clear, easily understandable group name and a description of its purpose that other database users will be able to understand. Both the name and the description should allow users to quickly figure out what particular groups are for when working in different contexts (e.g. CiviMail). This clarity and specificity is especially important once your organisation has amassed many different groups. If a group is created for a specific person within your organisation, it is a good idea to mention who the group owner is in the description so that in the future someone can check if this group is still used or if it can be deleted.

Groups can be assigned the following types:

- **Mailing List** is used if you plan to use this group as a mailing list in CiviMail. This group type is available for both Regular and Smart Groups.
- **Access Control** (Drupal only) is used to assign CiviCRM access permissions to a set of contacts. Only Regular Groups can be assigned the Access Control group type.

Visibility

Visibility determines permissions for joining and removing contacts from groups. Select "User and User Admin Only" if membership in this group is controlled only by authorised CiviCRM users. Select "Public Pages" if you want to allow contacts to join and remove themselves from this group via Registration and Account Profile forms.

Some organisations find it useful to create a hierarchy of groups. In CiviCRM, this is done by creating one or more parent groups and then assigning other groups to them. When a user sends a mailing to a parent group or searches for contacts in a parent group, all contacts in the associated child groups are automatically included.

For example, an organisation that has a national office and 5 regional offices puts constituents in each region into their own group. Then they create a National group which is assigned as the parent group for all regional groups. The national office can now send mailings to the National group, knowing that all contacts in the regional groups that are children of the National group will be included.

Group IDs

CiviCRM assigns a unique numeric ID to each group. These group IDs can be used for a variety of operations. For example, the group ID can be used to define a URL for group sign-ups. You can find a group's ID by checking the ID column in the tabled list of groups at **Navigation Menu > Contacts > Manage Groups**.

Tags

Tags are used to categorise contacts, activities and cases in CiviCRM. You can create as many tags as needed to classify the contacts in your database, though it is advisable to avoid duplicating existing tags or adding too many tags that aren't really necessary. It can be useful to create a standard process for creating and using tags within your organisation to avoid these problems.

GROUPS VERSUS TAGS

This is a common question on any project, and the philosophy described in the introduction of this chapter is a guideline, but rules might need to be bent based on how you intend to use your contact segmentation.

One interesting benefit of having both groups and tags is that you can perform more refined searches using AND and OR. For instance, if you have journalists, volunteers and members as groups and use tags to identify topics of interests such as development, art and history, you can find all the journalists who are interested in art or development, all the volunteers or members that are interested in history, or any other combination.

Beside that, groups have some features that tags don't:

- Groups are integrated into several other CiviCRM functions (most notably CiviMail).
- Contacts can be added to smart groups automatically based on characteristics.
- Groups can be associated to Drupal Organic Groups.

Think of it this way: tags can be applied to contacts, activities, and cases, whereas groups can only consist of contacts.

Adding and removing contacts to groups and tags

You can add contacts to groups in multiple ways:

- through the Tags and Groups section of the Contact Details edit screen
- through a contact's Groups tab
- by using the "Add Contacts to Group/Tag contacts" batch action after conducting a search
- by clicking a group's Contacts link in **Navigation Menu > Contacts > Manage Groups**.

Individual contacts can be added to a Group either in the contact edit screen or via the Groups tab. Multiple contacts can be added to a group at once by conducting a search, and then selecting Add Contacts to a Group using the More Actions menu. The second way allows you to add multiple contacts to a group by going to Manage Groups, selecting Members for the relevant Group and then using the Add Members to this Group option at the top of the screen.

MANAGING GROUPS

Manage Groups

Add Group

Find

Complete OR partial group name.

Type

☐ Access

☐ Control

☐ Mailing List

Filter search by group type(s).

Visibility

- any visibility -

Filter search by visibility.

Status

☒ Enabled

☐ Disabled

Search

Use Groups to organize contacts (e.g. these contacts are part of our 'Steering Committee'). You can also create 'smart' groups based on contact characteristics (e.g. this group consists of all people in our database who live in a specific locality).

Name	ID	Description	Group Type	Visibility	
Administrators	1	Contacts in this group are assigned Administrator role permissions.	Access Control	User and User Admin Only	Contacts Settings more ▶
Advisory Board	4		Access Control, Mailing List	Public Pages	Contacts Settings more ▶
bgm test (Smart Group)	13		Mailing List	User and User Admin Only	Contacts Settings more ▶

You can:

- ## FINDING CONTACTS IN A GROUP

54

[» Add Contacts to Newsletter Subscribers](#)

Find Contacts within this Group

Name or Email

is...

- any contact type -

Group Status

☒ Added
☐ Removed
☐ Pending

with

- any tag -

50 Results

Contacts IN Newsletter Subscribers ...AND... Group Status - "Added"

[» Advanced](#)

Select Records:
☐ All 50 records
☐ Selected records only

Print

- actions -

Go

A B C D E F G H I J K L M N O P Q R S T U V W Y Z

All

	Status	Name	Address	City	State
☐	Added	 Adams, Alan	161C El Camino Ln SW	Burlington	WV 26104
☐	Added	 Adams, Brzeczyslaw	662M El Camino Ln SE	North Star	MI 48061

Smart groups are useful in many different situations. They are often used to assist organisational workflows. For instance, when you find yourself doing the same search over and over on your contacts, you can save the search as a smart group. Whenever you select that group, CiviCRM will run the search and display the results. Any new contacts that meet the search criteria will be added to the group, and contacts that no longer meet the criteria will be removed from the group.

Go to: **Search > Find Contacts > Advanced Search.**

Check "Thank-you date not set?" and choose Donation from the Contribution Type dropdown menu.

Click the button that selects all the records

The next screen provides a review of the criteria chosen for the smart group. Give the smart group a name, a description (optional) and decide if you want to make this smart group a Mailing List (allowing you to include the smart group in CiviMail). Then click **Save Smart Group**.

GROUPS AND ACL

Access Control Lists (ACL) provide finer grained permissioning than what is available through Drupal's Permissions and Roles. Setting up ACLs requires a good understanding of the concept, which is thoroughly explained in the online CiviCRM documentation here: <http://wiki.civicrm.org/confluence/display/CRMDOC/Access+Control>

As with many processes, the key is to make sure you have assembled all the parts before you try to join them together. In this case, you must set up the required Groups, Custom Data Groups, Profiles and Roles before you can use them in ACL.

Note that ACL support for Joomla was introduced in Joomla version 1.6.

GROUPS AND ORGANIC GROUPS (DRUPAL ONLY)

The Organic Groups CiviCRM module (http://drupal.org/project/og_civicrm) integrates Organic Groups from a Drupal site with CiviCRM groups. This is useful for groups that require Organic Group functionality on their website but also need to be tracked within CiviCRM. Once an Organic Group of Drupal users are integrated into CiviCRM, the Drupal group can be used for mailings, tracking address information, tracking activities or anything else normally done with CiviCRM contacts.

Once the Organic Groups CiviCRM module is installed and enabled in Drupal it automatically creates two CiviCRM groups for each existing Drupal Organic Group:

- A normal group containing a contact record for each corresponding user who is part of an Organic Group. This group is assigned the same name as the linked Organic Group.
- An access control group containing the contact record of the administrator of the corresponding Organic Group. This gives the OG group admin the ability to view and edit members of their group in CiviCRM.

The groups are synchronised one way only, from the Drupal Organic Groups to CiviCRM groups. When a new user is added to or signs up for an Organic Group, they are automatically added to the corresponding CiviCRM group. If they leave the Organic Group then they are removed from the CiviCRM group. If an Organic Group is deleted, the CiviCRM group is also deleted. However, the reverse of each of these situations is not true; a contact added to the CiviCRM group will not appear in the Drupal Organic Group, a contact removed from the CiviCRM group will still remain in the Drupal Organic Group, and if you delete the CiviCRM group, the Drupal Organic Group will still remain. Therefore, this integration is meant to be used when you administer the group from the Drupal side.

WORKING WITH TAGS

To view tags, go to: **Contacts > Manage Tags (Categories)** in the navigation menu.

A tag can be edited or deleted using the respective links in its row. New tags can be created by clicking the Add Tag button on the Manage Tags (Categories) screen or by going to Contacts > New Tag in the navigation menu.

Add Tag
Add Tag Set

Tags						
Tag	ID	Description	Parent ID	Used For	Tag set?	Reserved?
Company	2	For-profit organization.		Contacts		Edit Delete
Government Entity	3	Any governmental entity.		Contacts		Edit Delete
Topics of interest	17			Contacts, Activities, Cases	✓	Edit Delete

Each tag should have a clear and unique name and an explanatory description to help users understand the tag's purpose. Tags can be structured hierarchically and designated as subtags of an existing tag by selecting a Parent tag from the dropdown list.

Tags can be designated for use for contacts, activities and/or cases. If a tag is designated for use for contacts, it will be available for all contact types and subtypes; tags cannot be specifically designated for use for only one type of contact.

Tags are a flexible tool and every user can create more if needed. However, very important tags can be locked to prevent them from being modified or deleted by users who do not have the "administer reserved tags" permission (this permission is available in Drupal only).

Tags can be assigned to contacts, activities and cases in the following ways:

- while creating or editing the record
- from the Contact Summary Tags tab
- by using the Tag Contacts batch action after conducting a search.

You can also use the first two methods to remove tags.

TAG SETS

Tag sets allow you to create free tagging taxonomies which users can add their own tags on the fly, without having to access the Manage Tags page described above.

Tag sets are created by going to: **Contacts > Manage Tags (Categories)** in the navigation menu and clicking the Add Tag Set button. Tag sets are configured identically to regular tags. However, they function quite differently. When you create a new tag set, it creates a new field on the edit pages of the entity's activities or cases as well as in the Tags tab for contacts.

This is a tokenising autocomplete field: as you begin to type, CiviCRM looks for matching tags in this tag set and displays any matches below the field. You can select an existing tag or create a new one by typing the entire tag and pressing the Enter key. The tag will then appear within the field in a box. Clicking on the X will untag the entity (contact, case or activity) that you are editing.

Tags created within a tag set can be viewed and edited from the normal **Contacts > Manage Tags (Categories)** list. However, tags created within a tag set will only be available within that particular tag set.

13. ACTIVITIES

Activities are a key concept in CiviCRM. Activities track interactions between the organisation and its staff, volunteers, clients or other contacts at a specific point in time. All of CiviCRM's components make extensive use of activities, such as recording contributions, event attendances, membership subscriptions, and emails and for each of these an activity is automatically created.

Several activities are included by default but you can create additional activity types to define specific things that your organisation does and you can add custom fields to activity types to allow specific data to be collected around some these activity types. So you might create activity types: **training and interview** and set up a custom field set that includes information such as **funder, project**, etc. for each of these activities. This would enable you to produce reports of all the activities undertaken for a particular funder or as part of a particular project. You could also create a custom field for a particular activity type so that you could classify meetings as **staff meeting, client meeting, other organisation's meeting etc.** For more on creating custom fields refer to the Custom Fields chapter. For details on producing reports, see the Reporting section.

Activities have the following attributes by default:

- **time**: activities always happen at a certain point in time
- **duration**: so you can collect all the time spent on a series of activities
- **status**: is the activity scheduled, completed, cancelled, etc.
- **added by**: the person who added this activity, or the contact if they carried out the activity themselves via the website
- **assigned to**: the person (usually within your organisation) that carried out (or will carry out) the activity (this is often the same as the person who added the activity)
- **with contact(s)**: the contacts in your database that are the subject of the activity.

Activities and groups. There can be some overlap between the use of these two. For example you could choose to record a membership packet being sent to a contact as an activity or simply add the contact to a group "received membership packet". It would probably be better to record this as an activity as then you can record when the membership pack was sent, who sent it, any notes about what the person requested, and so on. You could also use the activity to schedule sending membership packs by setting the status to scheduled.

Activities and events. It's also important to understand this distinction. For example should training be recorded as an activity or an event? That probably depends on whether the trainings are delivered to multiple people on a predetermined date or to individuals on a date that is negotiated. Also in contrast to a scheduled event that people attend, an activity can record something that happened in the past or is scheduled in the future. It's nearly always the right choice to record interaction between a staff person and someone contacting your organisation for service.

CREATING NEW ACTIVITY TYPES

Go to the Activity Type Options page **Administer -> Option Lists -> Activity** and click on Add Activity Type. Fill in the name and select the component you want to use this activity with: simply for contacts or for use in Cases (for more about Cases refer to that section). Finally enable the activity. Changing the weight will make the activity appear higher up or lower down the list of activity types.

Save Cancel

Label *

The option label is displayed to users.

Description

B I U Font Size A A [Icons]

Source [Icons]

Description is included at the top of the activity edit and view pages for this type of

Weight *

Component ☒ Contact ☐ CiviCase

Enabled? ☐

Save Cancel

SETTING UP CUSTOM FIELD SETS FOR ACTIVITIES

When setting up custom fields for an activity, you can choose which activity types the custom field set should apply to.

Save Cancel

Set Name *

Used For * Activities

- Partnership
- Pending Membership added to CiviMember
- Phone Call
- Potential Partnership
- Presentation

Order *

☒ Collapse this set on initial display

☐ Collapse this set in Advanced Search

☒ Is this Custom Data Set active?

Pre-form Help

B I U Font Size A A [Icons]

ACTIVITY STATUS OPTIONS

The default set of status options is

- Scheduled
- Completed
- Cancelled
- Left Message
- Unreachable
- Not Required

If you need to add more options this is possible although there is no direct menu link to do so. The path to reach this page is /civicrm/admin/options/activity_type?group=activity_status&reset=1.

However, before you add too many status options, remember that all status options show up on all activity types so think carefully about what you need to add.

14. RELATIONSHIPS

CiviCRM allows you to represent connections between contacts by creating relationships. For example, if a mother and son are both in your database, it can be useful to be able to look at either record and see that they are related to each other.

You can also track relationships between organisations, or between individuals and organisations. For example, entering an organisation in the Current Employer field of an individual contact's record automatically creates an "Employee of" relationship from the individual to the organisation, and an "Employer of" relationship from the organisation to the individual.

CREATING RELATIONSHIPS BETWEEN CONTACTS

1. Navigate to one of the records that you want to relate.
2. Click on the Relationships tab in the Contact's record.
3. Click **New Relationship**.
4. Select the Relationship Type. In this case it would be either "Child of" or "Parent of".
5. Click inside the Find Target Contact box and begin to type the first name of the person you are relating to this contact. One or more options will be displayed. Click on the appropriate entry.
6. Click **Search**.
7. Click the checkbox next to the name of the person you are relating to this contact.
8. You can scroll down and enter further information, which includes Start Date and End Date (in case the relationship is time limited), Description and Notes. There are also two permission-related options, which allow users of the database to edit this record. Finally there is an Enabled? box, which is checked by default.
9. When you have made the changes you want, click **Save Relationship**.

CONNECTING EMPLOYEES AND EMPLOYERS

A quick way to connect employees (which are stored in CiviCRM as individuals) to employers (stored as organisations) is to use the Current Employer field within an individual's record. This will set the current employer field in the contact record and create a relationship between the contacts.

1. Navigate to the record of the individual who you want to connect to an organisation.
2. Click the Edit button to edit the individual's record.
3. Begin typing the organisation name into the Current Employer field. As you type, matching names of organisations that already exist as contacts in CiviCRM will appear in a dropdown autocomplete list below the Current Employer field. If the organisation is already a contact in CiviCRM you can select it from the dropdown list by pressing the down arrow key or by clicking on it. If the organisation does not already exist as a CiviCRM contact, simply enter the full organisation name.
4. After the organisation's full name is entered in the Current Employer field either press the Enter key or click the Save button. If the organisation is a pre-existing contact, an Employee/Employer relationship will be created between the individual and the organisation. If the organisation does not already exist, a new organisation contact will be created and the relationship will be created between the individual and the organisation. You can click on the Relationships tab to view your newly created relationship Employee of and see any existing relationships.

ADDING CONTACTS TO ORGANISATIONS

1. Select the desired contacts from your search results as described above.
2. Select Add Contacts to Organization from the dropdown " - more actions - " menu, then click Go.
3. On the Add Contacts to Organization screen, select the Relationship Type from the dropdown menu.
4. Enter part of the desired organisation name in the Find Target Organization field, then click Search.
5. Organisations that match your search will appear in the "Mark Target Contact(s) for this Relationship" section below the Search and Cancel buttons. If the organisation you're looking for appears in this list, click the radio button next to that organisation and then click the Add to Organization button below. If the organisation you're looking for does not appear in this list, try entering something different into the Find Target Organization field and clicking Search again. If you are still unable to find your desired organisation it may not exist; click Cancel, add a new organisation, and try again.
6. After you've successfully chosen an organisation and clicked the Add to Organization button, you should see a message stating that the number of participants that you selected have been added to the organisation.
7. Click Done to return to your search results.

ADDING CONTACTS TO HOUSEHOLDS

1. Select the desired contacts from your search results as described above.
2. Select Add Contacts to Household from the dropdown " - more actions - " menu, then click Go.
3. Select the Relationship Type from the dropdown menu. Note that while CiviCRM will not stop you from adding multiple contacts as Head of Household for a single household, this may cause problems later on in any situation where you are expecting Head of Household to refer to only one individual per household. Therefore, the "Household Member of" option may be the better choice in most situations.
4. Enter part of the name of the household to which you are adding contacts (such as a last name shared by household members) in the Find Target Household field, then click Search.
5. Households that match your search will appear in the "Mark Target Contact(s) for this Relationship" section below the Search and Cancel buttons. If the household you're looking for appears in this list, click the radio button next to that household and then click the Add to Household button below. If the household you're looking for does not appear in this list, try entering something different into the Find Target Household field and clicking Search again. If you are still unable to find your desired household it may not exist; click the Cancel button, add a new household, and try again.
6. After you've successfully chosen a household and clicked the Add to Household button, you should see a message stating that the number of participants that you selected have been added to the household.
7. Click Done to return to your search results.

CREATING NEW RELATIONSHIP TYPES

1. CiviCRM comes with a set of common relationship types that can be used to indicate relationships between contacts. If you need to track different types of relationships between your contacts, you can create your own custom relationship types.
2. In the navigation menu, go to: Administer > Option Lists > Relationship Types.
3. Review the list of existing relationship types to ensure that you are not creating a duplicate.
4. If the relationship type you need does not already exist, click the New Relationship Type button.
5. Enter descriptive labels for the relationship type you are creating in the "Relationship Label-A to B" and "Relationship Label-B to A" fields. The "Relationship Label-A to B" field describes the relationship between Contact A and Contact B; the "Relationship Label-B to A" field describes the relationship between Contact B and Contact A. You will designate which contact types are used for Contact A and Contact B respectively in step 5.
6. Some relationships can be described by the same label in both directions; in these cases you can enter the Relationship Label once in the "Relationship Label-A to B" field. For example, when describing the relationship between two domestic partners named Sylvia and Audre, you can say that Sylvia is the "Partner of" Audre and Audre is the "Partner of" Sylvia. Therefore you would enter the "Partner of" label only in "Relationship Label-A to B" field, leaving the "Relationship Label-B to A" field blank.
7. In other situations one Relationship Label cannot be applied in both directions; in these cases you need to enter different Relationship Labels in each of the Relationship Label fields. For example, you can say that Kiyoshi is the "Grandparent of" Yuki but you cannot say that Yuki is the "Grandparent of" Kiyoshi. Therefore you would enter the "Grandparent of" label in the "Relationship Label-A to B" field and either "Grandchild of" or "Grandparent is" in the "Relationship Label-B to A" field.
8. Use the Contact Type A and Contact Type B fields to designate which kind of contacts are being linked by your relationship. Remember to check that the contact types you select for Contact A and Contact B make sense when corresponded to your Relationship Labels.
9. Optionally enter a description for this relationship type. This is especially useful if the intended purpose of this relationship type may not be obvious to other users.
10. Leave the Enabled box checked unless you intend to create this relationship type but not allow users to utilise it until a future date.
11. Click Save. You will see a message telling you that the relationship type has been saved and you will see your new Relationship Type in the list below.

DISABLING OR DELETING UNNEEDED RELATIONSHIP TYPES

If an existing relationship type is no longer useful or relevant for your organisation you can either disable or delete it so it is no longer presented as an option for new relationships. Disabling rather than deleting the relationship type has two significant advantages: you will still be able to see existing data on relationships of this type, and you can easily enable the relationship type again should you find you need it later.

1. In the navigation menu, go to: Administer > Option Lists > Relationship Types.
2. Click the "more" link in the row of the relationship type that you'd like to disable or delete.
3. Select either Disable or Delete from the pop-up menu.
4. If you select Disable, a pop-up confirmation bubble will appear. If you select Delete, you will be directed to an additional screen that provides a more serious warning and requests confirmation. Review the information provided in either confirmation message and if you are sure you'd like to complete this action, click the OK or Delete button.
5. If you have chosen to disable the relationship type it will appear in red in the Relationship Types list and relationships of this type will still be visible when viewing contacts. If you have chosen to delete the relationship type it will no longer appear in the Relationship Types list or in contact relationships data. In either case users will no longer be able to create new relationships of this type.
6. To enable a previously disabled relationship type, follow steps 1 and 2 above and select Enable from the "more" pop-up menu.

15. CREATING CUSTOM FIELDS

This chapter explains how you can collect information beyond what CiviCRM allows by default by adding custom fields to hold the data that you want to collect.

For example, you could add a set of checkboxes to organisations so that you could track the clients that they serve. You can also restrict custom fields to certain types of that object. For example, if you have a contact type Student, you might have a custom field listing the subjects they study.

Custom data fields are always stored as sets of custom fields in CiviCRM. Therefore, adding custom data is a two-stage process:

1. Create a custom field set, which is simply like a container to hold these custom fields together.
2. Add custom fields to this set. (You may find it helpful to read the information about custom fields first, but you will need to create the field set before you create the fields in it).

To clarify, a field is a unit of information entered into the database, such as someone's primary spoken language, or high school graduation date. A custom field set is a group of fields containing related data - that is, a set of fields related to a certain activity type, to participation in events, or to contributions.

CUSTOM FIELD SETS

Custom fields are always part of custom field sets, and each set has a scope as wide or as narrow as you choose. For instance, you might associate a custom field set called "nationality" with all contact types, another set such as "immigration status" with a specific contact type (e.g. Individuals), and yet another set with a specific component (CiviMember, CiviEvent), or with other elements such as Relationships and Groups. The scope of a custom field set is one of the few decisions that is irreversible (you will not be able to change it after creating it) so it is important to consider carefully what you want to associate your custom field set with when you start.

When creating custom field sets, you should ask:

- How will the fields in this set be used?
- What types of contacts or records will these fields be appropriate for?
- Will the fields have broad applicability, or are they relevant to a specific contact type, event, contribution type, etc.?

Taking the time to think through these questions helps keep your application screens as relevant and clear of superfluous fields as possible. For example, if your custom field set contains contact characteristics such as a field for the "color of eyes", you should associate them with the Individual contact type rather than the generic Contacts option, as this field would be irrelevant to Organization and Household contact types. Another example would be if custom data is specific to a particular event registration page. You should create this custom data for an Event type Participant for the specific Event.

Depending on how many custom fields you are creating, you should also consider grouping the fields topically. For example, you may associate 20 custom fields with Individual contacts, 12 of which fields relate to an online membership directory. Rather than group all 20 fields in a single custom field set, you may want to split them into two sets - one for the directory-related fields, and a second for more general Individual details.

To create a custom field set and custom fields, go to: Administer CiviCRM > Custom Data > New Set of Custom Fields. This form lets you assign a title to the field set, specify what type of records it will be used for, select the display characteristics, and enter help text. The form appears in the following image, and we'll describe each field.

Set Name

For custom field sets which are displayed inline, this name appears as the legend of the field set. If this set uses the tab display style, the name appears as the navigation tab label.

Used For

You can use this option to ensure that the fields appear only where they are relevant. The choices are:

- **Activity:** fields that may be assigned to all activities or to a specific activity type, such as Meeting or Phone Call.
- **Addresses:** creates an address block, which allows the administrator to create additional fields related to an address.
- **Contacts:** fields that may be assigned to all contacts.
- **Contributions:** fields that may be assigned to all contributions or to a specific contribution type, such as Donations or Event Fees.
- **Events:** fields that may be assigned to all events or a specific event type (e.g., Conference or Fundraiser). These fields are applied to an actual event, not the participant registration record.
- **Grants:** fields specific to grants.
- **Groups:** displayed in the Group settings (note that these fields are not searchable).
- **Household:** fields specific to the Household contact type.
- **Individual:** fields specific to the Individual contact type.
- **Memberships:** fields that may be assigned to all membership records or to a specific membership type.
- **Organization:** fields specific to the Organization contact type.
- **Participants:** fields that appear on the participant registration record. There are three options for these: general fields applied to all registration records, role-type fields assigned to a specific participant role, and event participant fields assigned to a specific event.
- **Pledges:** fields specific to pledges.
- **Relationships:** fields that may be assigned to all relationship records or to a specific relationship type, such as "Spouse of" or "Employee of".

Order

This controls the order in which your custom field sets are presented when you have created more than one set. Lower numbers (1, 2) are displayed above higher numbers (8, 9).

Multiple records

Each field usually contains a single option. For example, a person has either blue eyes or brown eyes, not both. However, some fields are more complex and may require multiple entries, such as a person's educational history. A single person may have multiple educational degrees, so a custom field set about educational history should allow multiple records.

CiviCRM provides this functionality for custom field sets assigned to contacts (whether to all contact types or to a specific type). To use this option, select the "Does this Custom Field Set allow multiple records?" option. This option has several restrictions:

- It is applied to the whole field set, not to a particular field.
- It must use tab display, not inline display.
- It can be used only for Contacts, not for Activities, Contributions, etc.
- It cannot be used in profiles, such as those used for Events.
- It cannot currently be exported.

Display style

Custom field sets for Contact records are displayed either "inline" on the contact summary page (the Summary tab), or as a new tab at the top of the contact record, along with Summary, Contribution, Group, Note, etc. We suggest using tab display for infrequently accessed fields and large sets of fields.

Custom field sets used for components, relationships, or other resources are always displayed inline. Also note that custom field sets configured to handle multiple records will be displayed in the Summary tab.

Is this Custom Field Set active?

If a custom field set is active, its fields can be viewed and changed. Otherwise, the fields are in the CiviCRM system but hidden from the user interface. This option can be valuable for managing your data, especially if you are migrating from an existing database system.

For example, your existing database may have fields you would like to transfer to CiviCRM for historical data keeping purposes, but plan to then deprecate or migrate to a new data structure. Suppose you are importing membership records from an MS Access database. Each record in Access has a unique ID (key) field, which has no direct benefit in CiviCRM. Rather than ignoring it altogether, you could create a custom field to hold the value, import the records, and then disable (keep the Activate option unchecked) the field, thereby hiding it from view and minimising the interface clutter.

Though not visible to users, the field value is stored in the system and can be referenced at a later date. For instance, if you ever need to investigate archived data for a possible discrepancy or compare the field value with a printed record.

Individual fields can be made inactive in the form defining those fields, once the custom field set is active.

Pre-form Help and Post-form Help

If you enter text in Pre-form Help, your help text appears above the form field, and if you enter text in Post-form Help it appears below the form field. Use help at this level to provide instructions related to the entire set of custom fields.

Other settings

You can specify that you want the custom field set to be "collapsed" on initial display. If you check this box, only the title for this field set is displayed when the page is initially loaded, because the fields are hidden. This is helpful for field sets that are infrequently used because it reduces the screen real estate taken up when the page opens. A similar "collapsed" property is available for the display of custom data in Advanced Search.

CUSTOM FIELDS

Once you have created a custom field set, you can create custom data fields within the set. Click "View and Edit Custom Fields" followed by "New Custom Field" and you will see the screen in the image below. We'll explain each of the options in this section.

After completing the field configuration options, click Save to record the field and return to the field listing for your current custom field set, or click Save and New to save the field and begin defining a new field. You can view a listing of all the custom fields in a custom field set at any time by navigating to Administer > Customize > Custom Data and clicking View and Edit Custom Fields.

With the exception of the data and input field type selection, all of the configuration options may be modified after your initial creation of the field. You may also find it useful to preview your custom fields, as well as the whole set of custom fields, as you are defining them. This is particularly useful for checking the layout of radio button and check-box fields with a large number of choices.

The screenshot shows the 'Custom Data Field' configuration form. It includes the following fields and options:

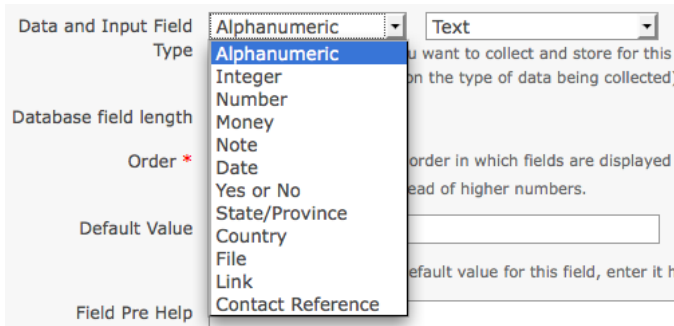
- Field Label ***: A text input field.
- Data and Input Field Type**: Two dropdown menus. The first is set to 'Alphanumeric' and the second to 'Text'. Below them is a note: 'Select the type of data you want to collect and store for this contact. Then select from the available HTML input field types (choices are based on the type of data being collected).'
- Database field length**: A text input field with the value '255'.
- Order ***: A text input field with the value '1'. Below it is a note: 'Weight controls the order in which fields are displayed in a group. Enter a positive or negative integer - lower numbers are displayed ahead of higher numbers.'
- Default Value**: A text input field. Below it is a note: 'If you want to provide a default value for this field, enter it here. For date fields, format is YYYY-MM-DD.'
- Field Pre Help**: A text area.
- Field Post Help**: A text area. Below it is a note: 'Explanatory text displayed to users for this field.'
- Required?**: A checkbox.
- Is this Field Searchable?**: A checkbox. Below it is a note: 'Can you search on this field in the Advanced and component search forms? NOTE: This feature is available to custom fields used for **Contacts (Individuals, organizations and households), Contributions, Pledges, Memberships, Event Participants, Activities, and Relationships.**
- Active?**: A checked checkbox.
- View Only?**: An unchecked checkbox. Below it is a note: 'Is this field set by PHP code (via a custom hook). This field will not be updated by CiviCRM.'
- Buttons**: 'Save', 'Save and New', and 'Cancel' buttons.

Field label

What you want to appear next to the field when it is displayed to the user. The text you enter here is also the label shown when you export data. When using fields in a profile, you can overwrite the Field Label. So on this screen you can choose names that are suitable for administrators, and give more user-friendly names when exposing them in profiles.

Type

Custom fields can be of many different types, many of which you've probably encountered when you have filled out forms on web sites. When you create a custom field, CiviCRM shows you a dropdown list of types from which you can choose the type that best represents the data you plan to store. The menu on the left (shown open in the following figure) indicates what kind of data you want to store, whereas the menu on the right indicates the way you want to interact with the user.



The types of fields are:

- Alphanumeric (i.e. text and number fields), which can be of the following types:
 - Text: a simple area in which users can enter text.
 - Select: a dropdown box which limits choice to one selection.
 - Radio: a list of options where you can make one selection. Unlike a Select box, all the options are visible on the screen at the same time.
 - Yes and No: a special kind of radio list with two contrasting options.
 - Check-box: a list of options that allows multiple selections.
 - Multi-select: a list of options in a single box. You can select multiple selections using control+click.
 - Advanced Multi-select: two lists side by side in which items can be moved from one to the other.
 - Autocomplete select: an autocomplete widget. The user can start typing, and when the text entered uniquely identifies a selection, the field automatically fills in the complete selection.
- Note: a longer text box which allows multiple lines. Notes come in two flavours:
 - plain, and
 - rich text, which displays a WYSIWYG editor that allows HTML.
- Integer, i.e. a whole number. This can be displayed as a:
 - text box
 - select box
 - radio list.
- Number: i.e. any number that includes decimals, such as 3.175. This can be displayed as a:
 - text box
 - select box
 - radio list.
- Money: similar to a number, but treated according to the local currency as configured in CiviCRM's administrative pages. This can be displayed as a:
 - text box
 - select box
 - radio list
- Date: a way of entering a date (and optionally time) value using a calendar widget. You can set a range of years which can be selected prior to and after the current date.
- State/Province: a list of available geographical locations as configured in CiviCRM's Localization settings (Administer > Configure > Global Settings >> Localization). Can be offered as either a select box or a multi-select box.
- Country: a list of geographical locations. Can be offered as either a select box or a multi-select box.
- File: offered as a browser where the user can select and upload a file.
- Link: an active internet hyperlink.
- Contact Reference: an autocomplete widget for an existing CiviCRM contact.

We suggest you experiment with creating different field types to get an idea of how they behave. Different options have implications for use. For example, check-boxes enable you to use OR as well as AND searches in Advanced Search, whereas multi-select will not.

Database Field Length

The database field length allows you to specify the number of characters that this field will contain. You should normally leave this at the maximum. In certain cases (for example if you are dealing with extremely large field sets) it might make sense to shorten this field to improve performance and decrease storage space, but setting a shorter length won't make any difference to the vast majority of users.

Order

Controls the order in which the fields appear. You may assign the order in the field edit form, or use the up/down icons on the main field listing table to adjust the field presentation. By default, new fields appear at the bottom of the field list within a set.

Default Value

Where applicable, you may designate a default value for a field. This value is automatically displayed or selected when users go to a form containing this field. Note the format required for date fields (YYYY-MM-DD).

Pre-form Help and Post-form Help

Ideally, your field name is self-explanatory and users will immediately know what to enter. But in those cases where there is some ambiguity, or where you wish to help regulate how a certain field is used, you may enter help text here. If you enter it in Pre-form Help, your help text appears above the form field, and if you enter text in Post-form Help it appears below the form field.

Your help text identified appears in all uses of the field in administration pages and is inserted as the default help text when fields are assigned to a profile. The person creating the profile can remove or change the help text there without impact on the original custom field definition.

Required

When selected, this means that a value must be provided for this field before the form can be submitted. Failure to do so will result in an error message directing the person to complete the required fields.

If you want a field to be required only when a user fills out a particular profile, you can leave this box unchecked but check the Required field in the profile.

Is this Field Searchable?

Makes this field appear in a panel of custom fields in CiviCRM's Advanced Search page. While you may be tempted to mark every field as searchable, doing so may unnecessarily clutter the Advanced Search custom field panel, when in fact certain fields will probably never be used in that way. You may toggle this option on or off at any time, so don't be overly concerned about arriving at a final decision when you first define a custom field.

Active

As with the active check-box in the form defining the custom field set, this box determines whether the field is disabled or enabled when CiviCRM shows it to the user.

View Only

This allows you to designate a field as visible but uneditable. There are two general uses for this field:

- To store data imported from another system that you want available for reference to the user, but do not want them to be able to modify.
- To store data that is controlled through a custom PHP hook rather than through the user interface. CiviCRM has a number of hooks defined that allow developers to modify data, as well as customise forms and screens, without modifying the CiviCRM code base. Read the chapter on hooks for more specific information.

Multiple choice options

For field types that involve selecting from a set of multiple options (such as Select, Radio, Check-box, Multi-select and Advanced Multi-select) you are given the choice of either using an existing set of options that you've already created for another custom field or creating a new set. You can enter these values while creating the field, and you can enter the values later. The option's label is displayed on the form, while the option's value is stored in the contact record. The label and value may be the same or different.

If you choose to use the same set of options for several fields, you will be notified when making any changes that this will affect an option set used by several fields.

When you create a new set, you have the option of initially entering up to ten multiple choice options in a table. If you need more than ten options, you can create an unlimited number of additional choices after saving this new field by using the Edit Multiple Choice Options link. Go to: Administer > Customize > Custom Data > View and Edit Custom Fields > Edit Multiple Choice Options. You can go to this screen at a later date to modify the label, order and active status of any multiple choice option, as well as add more choices.

Marital Status - Multiple Choice Options					
Label	Value	Default	Order	Enabled?	
Single	S		↓	Yes	Edit Option View more ▶
Married	M		↑ ↓	Yes	Edit Option View more ▶
Domestic Partner	D		↑ ↓	Yes	Edit Option View more ▶
Widowed	W		↑ ↓	Yes	Edit Option View more ▶
Other	O		↑	Yes	Edit Option View more ▶

▶ New Option for 'Marital Status'

If desired, you can also mark one of the choices as the default option.

Inactive options are hidden when the field is presented.

CHOOSING BETWEEN FIELDS, GROUPS AND TAGS

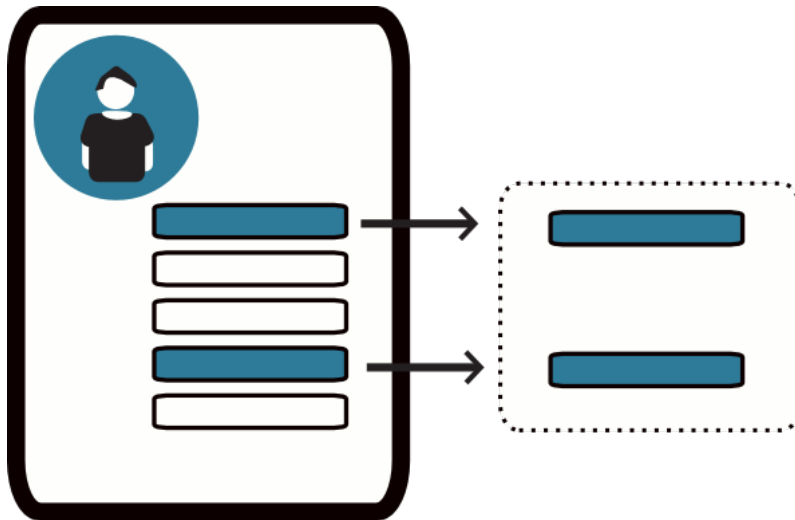
Data fields, groups and tags are three major ways to associate information with contacts. Although it can be tempting to just create a custom data field for every attribute of your data, take time to learn about the alternatives. They offer powerful functionality that you may miss out on if you rely only on custom data. Furthermore, using data fields for information stored more appropriately as groups or tags can slow your system. Finally, proper use of groups and tags makes it much easier for administrative staff to maintain the records.

Some tips that may help you choose are:

- Data that can take a wide range of values, such as a person's address or biography, should be stored in an alphanumeric custom data field.
- Custom data fields can be grouped and displayed on their own tab on the contact's record.
- As the name implies, Groups are used to group contacts. For instance, you'll probably assign board members to one group, staff to another, volunteers to a third, and so on. If you use Drupal, you can assign permissions based on group membership. You can also define a group that CiviCRM automatically adds contacts to and deletes contacts from, based on some characteristic. This feature is called a Smart Group.
- If you plan to use CiviMail for mass mailings and you want certain contacts to get a particular mailing, those contacts must be assigned to a Group. For instance, you may want a press release to go only to certain contacts; those contacts should be assigned to a particular group. This group could be a Smart Group.
- Both Tags and Groups can be structured hierarchically. For instance, a group or tag labeled Regions can have a subgroup or subtag for each geographic region your organisation covers (see "Case study in hierarchical tags" later in this section).
- Tags support more powerful search options than data fields or groups. For instance, visitors can search through multiple tags with both AND and OR operators. Data fields support only lists of words (which is effectively the same as an AND operator), except for fields represented as check-boxes, which support OR operators.
- Tags have a more sophisticated user interface than data fields or groups. The interface allows the visitor to add and remove tags without reloading the page in edit mode.
- Custom data fields can be assigned to a specific record type (e.g., only households), whereas tags will be assigned to all types once the tags are defined.

16. USING CIVICRM PROFILE

A profile is a collection of fields (both predefined and custom) from your database. By creating a profile you are able to take only those fields relevant for a specific purpose, such as collecting information about a person registering for an event or displaying a directory of members on your website. The diagram below provides a visual explanation of how existing fields are assigned for use in a profile.



SCENARIOS

Profiles provide powerful tools for collecting information from your constituents as well as sharing that information through your website. These features can save significant staff time by allowing people to update their own data, and you can display up-to-date information from your database in a variety of ways.

For example, a membership-based organisation can provide a searchable membership directory on their website that is updated as soon as a new member joins. Another example is a form where people can sign up to receive emails from your organisation. Once submitted, they are automatically added to the correct email list. Profiles can also be embedded in online contribution or event pages to collect additional information about the constituent.

This section will outline how to use profiles for both collecting and sharing data.

OVERVIEW

Profiles provide an flexible set of options for creating forms, directories, and much more. Think of a profile as providing a window into your data. Just as you can have many windows in a house giving different views of the various objects inside, you can have multiple profiles which refer to the same or different fields.

There are many ways that profiles can be used:

- **Forms:** a profile can be used as a form to collect information from your contacts. You can also add profiles to contribution, membership sign-up, and event registration pages to collect additional information from donors, members, and event participants. Profile forms can also be used as simplified data entry forms.
- **View/edit user account** (Drupal only): it is often useful to allow your constituents to manage their own data through your website. This use of profiles allows people to edit their information when they are managing their Drupal account; this information is then automatically updated in CiviCRM.
- **Website user registration:** you can include a set of fields in the new account registration form (Drupal) or create a profile that includes website user registration fields (Joomla!).
- **Directory:** a profile can be used to create a searchable directory for visitors to your site.
- **Search results:** using profiles allows you to display selected fields in the results of an advanced search.
- **Batch data updates** (mass updates): there is often a need to update a large number of records all at once; this process can be streamlined using profiles.

Another important point about profiles is that the same profile can be reused in multiple ways.

COLLECTING DATA FROM CONSTITUENTS

This section reviews the different methods by which you can use profiles to collect information from your constituents. A later section will discuss how to share information from CiviCRM with your constituents.

Volunteer sign-up form

Let's walk through an example of a profile used as a volunteer sign-up form. This simple form includes fields for First Name, Last Name, and Mailing Address. It also includes a reCAPTCHA widget to protect your site from automated abuse (described further below).

Signup

First Name *

Last Name *

Street Address

City

Postal Code

Country United States

State / Province - select -

them vita

Type the two words:

reCAPTCHA™ stop spam. real people.

To build a form similar to this one:

1. Go to: **Administer > Customize > CiviCRM Profile** and click on **Add CiviCRM Profile**.
2. Give the profile a meaningful name, and mark it to be used for a Profile:



Profile Name *

Used For  ☒ Profile ☐ Search Results ☐ Drupal User Registration ☐ View/Edit Drupal User Account

3. The next two text fields allow you to include help text to assist the person filling out the form.
4. The remaining options are listed under **Advanced Settings** (click on the gray bar to expand this section):
 1. **Limit listing to a group:** this is very important. If the profile is used for a searchable directory, by default CiviCRM will expose every record in your database; this is not ideal in many cases. Use this setting to limit the available records to contacts who are part of a regular or smart group. For example, if an organisation needs to limit a profile listing to show only active members, they can create a smart group of all members that have a status of New and Current. They then limit the directory to only show contacts in that smart group. Remember, smart groups are dynamic lists of records; when new memberships are added, the corresponding contact will automatically be included in the directory.
 2. **Add new contacts to a group:** this is applicable when using a profile as a sign-up form. You are able to directly add all the contacts who fill out the profile form to a particular group. For example, if your profile form asks contacts to offer their services as a volunteer, then all those who fill out the form can be automatically be added to a volunteer group.
 3. **Notify when profile form is submitted?:** who in your organisation should receive an email when someone fills out the form? Enter their email address here. If you want to send email to multiple addresses, separate them with a comma.
 4. **Redirect URL:** when someone clicks **Save** to submit the form, do you want to take them to a specific URL? Normally you would create a special thank-you page on your website to redirect people to. If this field is left blank, the user will be directed to a page which displays the information they've just entered (a profile view page). This setting does not apply if you embed your form in an event sign-up or contribution form.
 5. **Cancel Redirect URL:** similar to the previous item, what is the URL you want to redirect people to if they click Cancel on the form? Again, this setting does not apply if you embed your form in an event sign-up or contribution form.
 6. **Include reCAPTCHA:** CAPTCHA is a type of spam blocking software that requires the visitor to fill in text generated from a graphic. This prevents automated spiders (robots) from completing the form. It is highly recommended that you include it. You must have configured a free reCAPTCHA account before enabling this. Go to **Administer > Configure > Global Settings > Miscellaneous Settings** to configure your account (click the help icon for on that form for detailed instructions).
 7. **What to do on duplicate match:** use this option to control what happens when the contact data submitted from this profile matches an existing contact record. Options are to update the matching record, create a duplicate record, or give the user a "duplicate record" warning (in which case their input will not be saved). This setting is ignored if the profile is embedded in an online contribution, membership sign-up or event registration form. In these cases, a contact match always results in the transaction being linked to the matching contact. Note that if there are multiple matching contacts, the first matching record is used.
 8. **Proximity search:** if you are using this profile as a search form, you can choose to include proximity searching. When enabled, a proximity search block will be added to the search criteria. This block contains fields to set the proximity start address, and a field to set a "radius" (distance from that address). Set the proximity search as required if you want all searches using this profile to force the user to enter a start address and a radius.

Once you have saved the profile settings, it's time to add fields to the profile. If you plan to reference custom fields in a profile form, make sure that those fields have already been created.

Some important notes on adding fields:

- You can change the name of a field label for the profile. For example, the Postal Code field can be renamed Zip Code if your audience is more familiar with that term.
- Certain fields can be required (must be filled out). In this scenario, we would want to make at least First Name and Last Name required, and probably some sort of contact information such as email address and/or phone number.
- You can make a field View Only, which means it will be displayed on the profile form but not editable (this setting is not relevant for the volunteer sign-up scenario).
- If the profile is being used as a searchable directory, set the Visibility of any fields you want to include on the search form to Public Pages or Public Pages and Listings. For our volunteer sign-up scenario, we are only using the profile as a sign-up form, so we can set Visibility to User and User Admin only. This ensures that other visitors can not view any form data.

CiviCRM Profile Field

Save

Save and New

Cancel

Field Name

Individual

First Name

Select the type of CiviCRM record and the field you want to include

Field Label

First Name

The field label displayed on the form (over-ride the default field label)

Required?

☒

Are users required to complete this field?

View Only?

☐

If checked, users can view but not edit this field.
NOTE: View Only fields can not be included in Profile Search form

Visibility *

Public Pages and Listings

Is this field hidden from other users ('User and User Admin Only' or 'Public Pages' or 'Public Pages and Listings')? When visibility is 'Public Pages and Listings', users can view this field in order to locate other contacts with the same value(s) (e.g. email address)

Searchable?

☒

Do you want to include this field in the Profile's Search form?

Linking to your Form

Once your profile sign-up form is built, it is ready to be used! There are several ways to do this.

- **Drupal:** if you intend to give your volunteers access to some back-office CiviCRM functions, you can add an item to the CiviCRM navigation menu which links to this form (from Administer > Customize > Navigation Menu). These users will need be given the "access CiviCRM" permission.

- **Drupal:** create link(s) to the form using the following path:
<http://www.myorganization.org/civicrm/profile/create?reset=1&gid=N> where *N* is the ID of the profile (each profile has a unique numeric ID which you can find by going to Administer > CiviCRM Profile and checking the third column of the table).
- **Drupal:** create a link or a menu item for logged-in users to edit their own information. If they are logged in and go to the profile URL, the fields of the profile will be prepopulated and they will be able to edit any fields needing updating. The URL path here is:
<http://www.myorganization.org/civicrm/profile/edit?reset=1&gid=N> where *N* is the ID of the profile.
- **Joomla!** use the Menu Manager to create a front-end menu item. After creating a new menu item, select CiviCRM and choose the type of profile display you would like to use. In the parameters pane, choose the specific profile to use.
- A great feature is to provide non-logged-in users with the ability to view and edit their contact information via a profile using CiviMail. To do this, insert the following link with appropriate tokens as shown into a CiviMail message:
http://www.organisation.org/civicrm/profile/edit?reset=1&gid=N&id={contact.contact_id}&{contact.checksum}
 where *N* is the ID of the profile form you want them to use for editing. The token {contact.checksum} generates a special link that prepopulates the fields of the profile with any information that already exists for them in that profile. The special link lasts for 7 days from the day you send the mailing. This feature can be used for either Drupal or Joomla! sites.
- The last option is to not link directly to the profile at all, but simply embed the profile form into any page on your website - or ANY website, for that matter. On the **Profiles Administration** page, click **more**. There is an option called HTML Form Snippet. Clicking it takes you to a screen where you can copy the raw HTML code and paste it into any page on your site or any website where you want to collect information. Make sure the reCAPTCHA feature is NOT enabled for this profile; reCAPTCHA requires dynamic page generation so submitting a standalone form with reCAPTCHA enabled will always result in an error.

DATA ENTRY TOOL

If you have volunteers or interns who perform manual data entry for your organisation, you can make their task easier by creating a profile form which shows only the fields they need to input. This greatly simplifies data entry and reduces the chance of data being incorrectly entered.

INCLUDING PROFILES ON EVENT REGISTRATION AND CONTRIBUTION PAGES

Often you will want to define certain fields for inclusion in event registration and contribution pages. This process is similar to the volunteer sign-up example above. The only significant difference is that you can include fields in your profile that are specific to participant records (for event registration forms) and contributions (for contribution pages). Read the sections covering creating contribution pages and event registration pages for more information.

INCLUDING PROFILES IN DRUPAL'S USER REGISTRATION SCREEN

For websites that have logged-in users, you may want to allow people to provide additional information as they register for an account on your website. Similarly, when people fill out a profile form you may want to encourage (or force) them to sign up for a user account.

To include a profile form during the user registration process:

1. Create a profile that is used for User Registration:



Profile Name *

Used For  ☐ Profile ☐ Search Results ☒ User Registration ☐ View/Edit User Account

2. Add the fields you want people to fill out as they register, using the same process described above. Make sure the field visibility is set to Public User Pages.

INCLUDING PROFILES IN DRUPAL'S MY ACCOUNT SCREEN

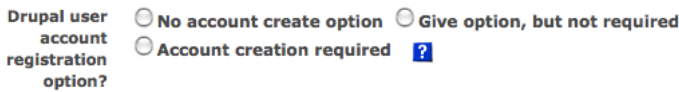
You can embed one or more CiviCRM profiles directly into Drupal's My Account screen. This makes it easy for logged-in users to review and update their information whenever they visit their My Account page.

To create a profile for this purpose:

1. Create a new profile, or navigate to an existing profile and click Settings.
2. Select View/Edit User Account in Used For.
3. Click Save.
4. Add the fields you want people to be able to edit from their Drupal My Account page.

NEW ACCOUNT CREATION DURING PROFILE SIGN-UP

If you want your constituents to create a Drupal or Joomla! account when filling out a profile, you can enable this with the "User account registration option" under Profile Settings > Advanced Settings. Anonymous (not-logged-in) users will then be invited (or required) to create an account when they visit the profile. Logged-in users will just see the profile fields.



Drupal user account registration option?

☐ No account create option ☐ Give option, but not required

☒ Account creation required 

You must include a Primary Email Address field in the profile for this feature to function properly. This feature also works when the profile is embedded in an online contribution page or event registration page. Hence you can invite or force anonymous visitors to sign-up for an account when they register for an event.

SHARING INFORMATION

Profiles and directories

Many organisations have data they would like to display on their website. Historically this has been difficult because it required updating the same data in two places - a website and a database. Using CiviCRM profiles solves this problem because it allows you to expose data from your database on your website while only needing to manage and update the data in CiviCRM.

For example, an organisation called Native Americans in Philanthropy (NAP) wanted to create a membership directory that their members could use to search and connect with other fellow members. Before CiviCRM, they would create a very expensive annual print directory and mail it to every member. This process was time-consuming and expensive, and some data would be out-of-date before the members received their directory. Switching to CiviCRM meant significant resource savings and, because their website became a portal for their members to connect, it helped to advance their mission.

To build your directory:

1. Go to: Administer > Customize > CiviCRM Profile.
2. Click Add CiviCRM Profile.
3. Set Used For to Profile:

Profile Name *

Used For  ☒ **Profile** ☐ **Search Results**

4. Advanced Settings: there are a few options under advanced settings that are helpful when using profiles for directories.
 1. **Enable mapping:** a really cool feature available in CiviCRM is to allow visitors to map contacts in your directory using Google or Yahoo! maps. They can then obtain directions to a record's address dynamically. To use this feature, you must have already enabled mapping under Administer > Configure > Global Settings > Mapping and Geocoding.
 2. **Include profile edit links:** check this box if you want to include a link in the directory listings to allow people to edit the profile's fields. Only users with permission to edit the contact will see this link. More often than not you will not need to enable this setting as it is not commonly used in the membership directory scenario.
 3. **Include Drupal user information** (Drupal only): check this box if you want to include a link in the directory listings to view a contacts' Drupal user account information (e.g. their My Account page). This link will only be included for contacts who have a user account on your website.

- ☐ **Enable mapping for this profile?** 
- ☐ **Include profile edit links in search results?** 
- ☐ **Include Drupal user account information links in search results?** 

Now it's time to include the fields that will make up the directory. For profiles used as directories you have total control over which fields:

- are searchable in the directory
- appear in the results columns of your search
- appear in the record detail View page.

The important options you must configure in the fields for directory purposes are shown below:

Visibility *

Is this field hidden from other users ('User and User Admin C Search form ('Public User Pages' or 'Public User Pages and Lis also click the field value when viewing a contact in order to lo live in Poland).

Searchable? ☐

Do you want to include this field in the Profile's Search form?

Results Column? ☐

Is this field included as a column in the search results table? User Pages and Listings' visibility.

- Visibility for all fields in your directory must be set to **Public Pages** or **Public Pages and Listings**. The difference between these two options is that those configured as Public Pages and Listings will have the field in detail view hot-linked, enabling the user to generate a follow-up search for other records which also have that same field value. For example, you might set City to Public Pages and Listings. After the user conducts a search and views the details for a record they can click on the city value and run an immediate search. The search will run as if they had selected that city in the profile search screen.
- The **Searchable** option determines if visitors to your directory can search the directory by this field. In common directory uses, almost every field is set to searchable. The more fields you set to searchable, the more power you provide to your visitors to find the information they need.
- The **Results Column** check-box determines if the the field is displayed as a column in the list of results. For example, your directory may have a field for website, and if you set the website field to appear in the results column, it will appear in the results table. If you do not check the results column the field will still appear in the view mode for a record. In other words, checking Results Column? will allow the field to appear in the results column AND in detail view mode.

The image below shows the search mode for our membership directory.

Membership Directory

☐ Search Criteria

Name

City

Email

Search

Once you hit search you get this result set. Profile fields that have Results Column checked are shown in the listing.

 Name	 City	 Email	 Website	
 Alliance for Good	New York	help@alliancegood.org	http://alliancegood.org	View Edit
 Floss Manuals	Berlin	info@flossmanuals.net	http://en.flossmanuals.net	View Edit
 Save Our Planet	Seattle	info@example.org	http://www.example.org	View Edit

Clicking the view link gives you more details about the constituent, showing all profile fields.

Membership Directory - Floss Manuals

Member Name

Floss Manuals

City

Berlin

Email

info@flossmanuals.net

Website

<http://en.flossmanuals.net>

As we've seen, building a directory for your website can provide a valuable tool for your constituents.

Linking to Your Directory

You have several options to link to your directory:

- **Drupal:** link to the directory search page using this path:
<http://www.myorganization.org/civicrm/profile?reset=1&gid=N> where N is the ID of the profile directory.
 - If you add **&force=1** to the above URL it will directly show a result set.
 - If you add **&force=1&search=0** it will hide the search criteria and directly show the result set.
- **Joomla!:** use the Menu Manager to create a front-end menu item. After creating a new menu item, select CiviCRM and choose the profile search option. In the parameters pane, choose the specific profile to use.
- You can also prepopulate any search criteria in the URL. These options are described here:
<http://wiki.civicrm.org/confluence/display/CRMDOC/Linking+Profiles>

OTHER PROFILE USES

Search results

Searching is outside the scope of this section but, assuming you are familiar with searches, you may wish to change the columns used to display the results of an advanced search. To do this:

1. Create or open a profile and mark it as used for Search Results:

The screenshot shows the 'Profile Name' field set to 'Custom Search Results'. Under the 'Used For' section, the 'Search Results' checkbox is checked, while 'Profile', 'User Registration', and 'View/Edit User Account' are unchecked.

2. When adding fields to this profile, you will need to set Visibility for the fields to Public Pages and check the Results Column box.

When conducting your advanced search, use the Search Views dropdown menu in the top right of the page to select your profile.

Batch updates

The final way that profiles can be used is to perform batch updates of data. For example, you have a custom field called "volunteer interests" and you want to update the volunteers group with a certain interest. You can easily update the entire group using a profile.

1. Create or open a profile and mark it as used for Profile:

The screenshot shows the 'Profile Name' field set to 'Update volunteer interests'. Under the 'Used For' section, the 'Profile' checkbox is checked, while 'Search Results', 'User Registration', and 'View/Edit User Account' are unchecked.

No other profile settings are relevant for this type of usage.

2. Add your fields to the profile. Only add the fields you want to batch update. In the above example, the only field you would need is your custom "volunteer interests" field (contact name is always displayed when doing batch update). Remember, fields added to the profile must all be of the same contact type. You cannot add fields that are specific to both organisations AND individuals.

Once your profile is created, and you have conducted your search, select **Batch Update via Profile** from the actions dropdown menu and click Go. Then select the profile you want to use.

WORKING WITH YOUR DATA

17. MENU, DASHBOARD & DASHLETS

18. SEARCHING

19. IMPORTING DATA INTO CIVICRM

20. EXPORTING YOUR CONTACTS

21. DEDUPING AND MERGING

22. TOKENS AND MAIL MERGE

17. MENU, DASHBOARD & DASHLETS

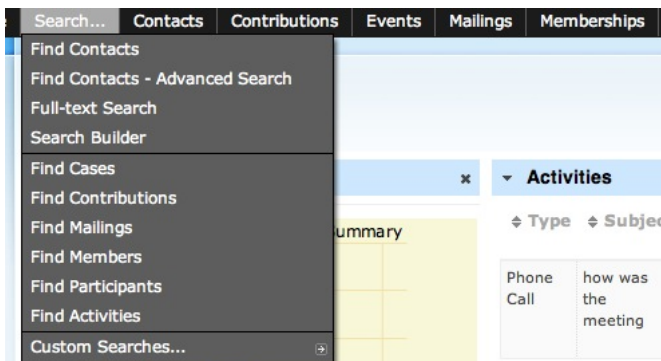
This chapter gives an overview of CiviCRM's dashboard (it's 'home page') and the navigation menu available for people working in CiviCRM.

THE NAVIGATION MENU

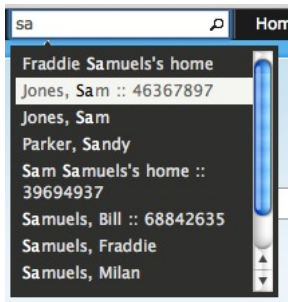
The navigation menu is a small bar at the top of every "back office" page of CiviCRM.



It provides access to nearly every function of CiviCRM and is broadly organised into headings by individual CiviComponents (such as Contributions, Events and Mailings), with a few exceptions for Search and Administer, both of which cover all of the enabled CiviComponents.



The menu also features a Quick search field for finding contacts. Typing any part of a contact's name or email address into the Quick search field will pull down a list of possible matches that you can click on to go directly to the contact's summary page:



You can modify the navigation menu by going to: **Administer > Customize > Navigation Menu** and then adding or rearranging menu items on the screen. Remember that changes you make to the navigation menu will be seen by everyone who has the appropriate permissions to see the menu, for better or for worse, so be careful when modifying the navigation menu.

THE DASHBOARD

When you first log into CiviCRM, the first page that you will see is the dashboard (CiviCRM Home). The dashboard allows you to see important information about your site and CiviCRM by displaying a series of "dashlets". A dashlet is a snippet of information about a part of CiviCRM: many dashlets come with CiviCRM by default, and you or your administrator can create additional dashlets that are specific to your organisation's needs. Some examples of dashlets that come with CiviCRM include:

- CiviCRM Home

[Configure Your Dashboard](#)
[Refresh Dashboard Data](#)

Donor Report (Summary)

Month	Amount (USD)
Mar 2009	100
Apr 2009	1,100
Jul 2009	700
Oct 2009	200

Activities

Type	Subject	Added By	With	T
Phone Call	how was the meeting	josue@progressivetechnology.org	Yadav, John	

Membership Report (Summary)

Month Beginning	Membership Type	Member Count	Total Payments Made	Contri Count
March 2009	Student	1	\$ 0.00	
	SubTotal	1	\$ 0.00	
April 2009	General	1	\$ 0.00	

CiviCRM Home

✓ Done

Available dashboard elements - dashlets - are displayed in the dark gray top bar. Drag and drop dashlets onto the left or right columns below to add them to your dashboard. Changes are automatically saved. Click 'Done' to return to the normal dashboard view.

Available Dashlets

Event Income Report (Summary) x

Left Column

Donor Report (Summary) x

Right Column

Activities

Membership Report (Summary) x

Access Keys:

84

Almost any CiviCRM report can be made available as a dashlet. Select a report from Reports > Create Reports from Templates. Update the report criteria as needed. For example, you may want the dashboard version of the report to always show data for "This Quarter" or "This Year". You can also choose to display the report as a table or as a bar or pie chart. Preview the report display. Then check the "Available for Dashboard" checkbox under Report Settings. (Refer to the Reporting section for more details on working with reports.)

18. SEARCHING

This chapter covers different ways to find information you've stored in CiviCRM. Two of the techniques in this chapter - finding contacts and the "search-action" workflow, described in the second bullet below - are core functions in CiviCRM, so most if not all users will find this chapter helpful.

We will start off with some simple searches and then move on to more advanced techniques. CiviCRM beginners should be familiar with Quick search, Advanced search and the component searches. More advanced users should also look at reports, custom searches and search builder.

There are three main reasons to search:

- To find a specific contact: the Quick search box can find contacts by name or email address, and an Advanced search can find contacts by other characteristics.
- To perform an action on a contact/contacts that meets certain criteria: a common workflow in CiviCRM, called a "search-action", is to find contacts that meet certain criteria and then perform an action on them. For example, you might want to find all contacts in the advisory group in order to invite them to a meeting, find all those whose memberships have recently expired to send a renewal reminder, or find all contacts aged under 25 in a specific location to send them an email about an upcoming event nearby.
- To do a form of ad-hoc reporting.

For reports, searching is often useful but has limitations. For example, you can't group results by particular criteria, summarise, or easily produce graphs of the results. For more advanced reporting, read about CiviReport in the section Reporting.

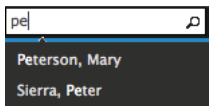
Note that when you search for character strings, the search is not case-sensitive. For example, if you search for 'brooklyn', the search will return strings with capitalised letters if the string exists, e.g. 'Brooklyn' or 'BROOKLYN'.

QUICK SEARCH FOR CONTACTS

The easiest way to find a specific contact, if you know part of their name or email address, is to use the Quick search box that appears in the navigation menu at the top left of the screen. Contacts that match the phrase you enter will appear in a dropdown list below the box. For example, entering "peter" will find

- people who's first or last name is Peter
- people who have Peter appearing as part of their name, e.g. Mary **P**eterson
- people who have Peter as part of their email address, e.g. **p**eter@gmail.com
- organisations with Peter in their name, e.g. **P**etersfield Community Centre.

You don't need to type the full name of the person - just the first few letters. The following screenshot shows that two contacts turn up in our database when we search just for "pe".



ADVANCED SEARCH

Advanced search allows you to search across all the information you have about your contacts. For example, you could find "all contacts in Venezuela" or "all advisory group members". If you specify two or more categories of information, the search displays every contact that matches all the categories. For instance, you can combine the two criteria just mentioned to find "all advisory group members in Venezuela".

The Advanced search screen is accessible from the navigation menu Search > Find Contacts > Advanced Search. On this screen, search criteria are grouped into sections which refer to different types of data that you can search on, such as address data, notes and information from components such as Contributions or Events. Each group of criteria is shown as a gray bar. If you click on a gray bar, it expands to reveal the options within that group. For example, if you want to search for all people in your database from 16 to 18 years old, click on the Demographics bar. It expands, as shown in the following figure, and you can specify the birth date range you are interested in.

A screenshot of the 'Demographics' search criteria section in a web application. The section is titled 'Demographics' with a dropdown arrow. It contains several input fields: 'Birth Dates' with 'From' and 'To' date pickers (showing 05/08/1994 and 05/06/1996 respectively) and '(clear)' links; 'Deceased Dates' with similar 'From', 'To' date pickers and '(clear)' links; and 'Gender' with radio buttons for 'Female', 'Male', and 'Transgender', followed by a '(clear)' link. Below these are several expandable sections: 'Notes', 'Change Log', 'Contributions', 'Memberships', 'Events', and 'Cases', each with a right-pointing arrow. At the bottom of the section is a 'Search' button.

Combining search criteria

Different criteria are combined by "ANDing" them. For example, if you select the tag "major donor" and the country "Mexico", the search will return major donors from Mexico. The search will not return major donors who are *not* from Mexico, nor those from Mexico who are *not* major donors.

Within criteria groups that allow you to check boxes for more than one value, these options are also combined by "ANDing". For example, if you can search for contacts whose Preferred Communication Method is both Email *AND* SMS.

With fields that allow you to select values from a dropdown list, options are combined by "ORing". For example, you could find contacts that live in Mexico *OR* the United States by selecting both countries in the country field.

Display Advanced Search results as...

Advanced Search returns your results as Contact records by default. However, you may want to get another record type instead. For example, you may want to see all the Contribution records which match your search criteria (while taking advantage of the rich set of search filters available in Advanced Search). Simply select the record type you want from the dropdown in the upper right corner of the Advanced Search form.

Modifying search columns

Advanced searches allow you to use to change the columns displayed in your search results. The default columns are Name, Street Address, City, State, Postal Code, Country, Email and Phone. If you want to display a different set of columns (perhaps to include a custom field or remove a column you don't need), create a Profile with the Search Results option selected. Make sure that the fields in this Profile are set to "Public User Pages and Listings" visibility, and are marked as Results Columns. (For more information about creating Profiles, which are described in detail in the Profiles chapter in the Configuration section.)

The Profile will appear in the Search Views dropdown menu in the upper right corner of the form, as shown below. The following screenshot shows what the menu displays after someone has created a Profile called "Birthday".

Combining this feature with the "Batch Update via Profile" action provides a powerful method of viewing and updating a specific set of fields across a batch of contact records.

Using groups in a search

When using Advanced Search, if you select several groups in the Group list near the top, it will treat the search as an OR search, and return results for contacts who are in any of the groups you select. If you want to find contacts who belong to all of the selected groups, you will need to use Search Builder.

There is also a very useful built-in custom search, "Include/Exclude Contacts in a Group/Tag", that enables you to find contacts who are in one group but not in another, which you can find by going to Search > Custom Searches in the navigation menu.

Groups_searchIncExc

Instant view pop-up

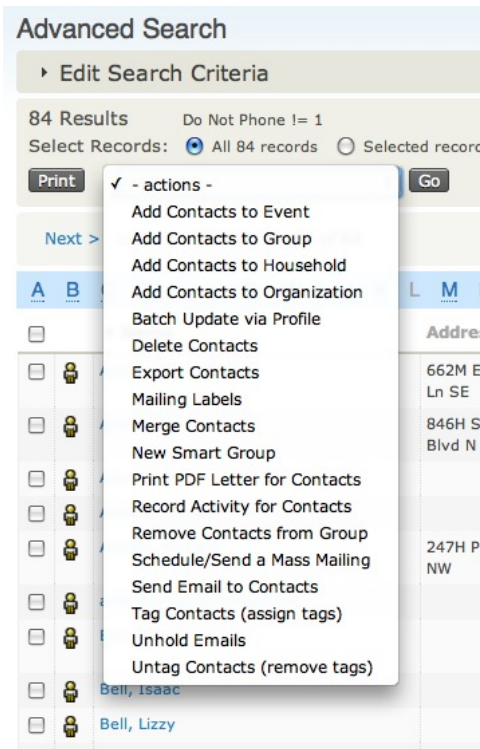
You can see a pop-up box with detailed information for any contact listed in your search results by hovering over the contact icon in the left column, as shown below. You can adjust the fields shown in this "pop-up view" by modifying the fields included in the "Summary Overlay" profile (**Administer > Customize > CiviCRM Profile**).

Home Phone	Groups	Newsletter Subscribers
Home Mobile	Tags	
Primary Address	Gender	Male
Primary Email	Date of Birth	September 18th, 1997
Website		

Adams, Jane

THE "SEARCH-ACTION" WORKFLOW

After you retrieve your search results, you can perform a number of actions. An Actions box appears above the results. You can select either all records or specific records, then carry out an action with the selected records. Different actions are covered in more detail in the chapter on Everyday Tasks.



Some of the most commonly used actions are Add Contacts to Group, Export Contacts, Map Contacts, and creating and printing Mailing Labels. (To use Map Contacts, you will need to configure Mapping and Geocoding. You can read more about this in the Installation chapter of the Configuration section of this manual).

For example, to send email to a selected number of contacts, mark the contacts you are interested in and then select Send Email to Contacts in the dropdown list of actions.

THE WILDCARD (%)

Understanding wildcards greatly expands your search options. A wildcard represents any character (letter, numeral or punctuation mark). In CiviCRM, the wildcard is represented by the % symbol (you may be familiar with other symbols such as * from other applications). It is most easily understood through examples.

Suppose that somebody asked you to find a contact with a first name similar to "Michael", but possible something different such as "Michelle" or "Michał". If you search for "Mich%" you will find all these variations, including a contact who is supposed to be named "Michael" but whose name was misspelled as "Micheal". Wildcards can be used before, after, or even within words. For example, searching on 'Mich%el' will exclude "Michał" and "Micheal" but still find "Michelle" and "Michael".

This search is not case sensitive. Entering "mi%el" in lowercase will also find contacts with an upper case 'M' in their name.

COMPONENT SEARCHING

Most CiviCRM components offer a search on the data they maintain, such as Find contributions, Find members, etc. These forms work in a similar way to Advanced search but return rows of the main objects associated with the components, instead of contacts. Find Members returns memberships, Find Participants shows event registrations, Find Contributions returns contributions and so on.

Each component search has its own Action list. See the Component sections for more details.

SEARCH BUILDER

Advanced search lets you choose from a wide range of criteria, but it has limitations. The main limitation is that the search criteria you enter into different fields are "ANDed" together.

The Search Builder tool provides an alternative for situations when you need to search using OR for some criteria. For example, you can build a search for contacts who are born within a range of dates OR who are female. To do this, access the Search Builder tool and Edit Search Criteria from the navigation menu: **Search > Search Builder**.

To AND criteria (which means to find results matching all criteria specified), click **Another search field** and enter criteria under **Include contacts where**. To OR criteria (which means to find results matching either one OR the other criterion), enter one criterion in **Include contacts where** and the other under **Also include contacts where**.

▼ Edit Search Criteria

Include contacts where

Individual Birth Date >= 19440101

> Another search field

Also include contacts where

Individual Gender = Female

> Another search field

> Also include contacts where

Search

Search Builder is intended for advanced users and requires you to use specific formats for your search values.

Fuzzy Matches

If you want to search on partial names or other incomplete phrases - use the LIKE operator, and use the % symbol before or after your search term. For example, to find contacts whose last name begins with "Gree":

Record Type	Field	Operator	Value
Individuals	Last Name	LIKE	Gree%

Search Builder requires special values when matching on values which are stored as keys in the data. This includes Groups, Tags, States, Countries, yes/no (boolean) fields and multiple-choice custom fields. Specific date formats are also required.

The following list describes what format you need to use to search for specific terms.

Group - The Group ID. Find this integer value by checking the gid= value in the Members link for the group (from Manage Groups)

Tag - The Tag ID. Find this integer value by checking the id= value in the Edit link from Administer CiviCRM » Tags

State - Either the full state name (e.g. 'California') OR the state_province ID (e.g. 1004). Find the ID by viewing the HTML source for the State select field while editing a contact.

Country - Either the full exact country name as stored in the CiviCRM database (e.g. 'United States') OR the country ID (e.g. 1228). Find the ID by viewing the HTML source for the Country select field while editing a contact.

Dates - Use YYYYMMDD format. Example: Enter August 18, 2006 as 20060818

Yes/No Checkboxes - This covers fields like DO NOT EMAIL, IS DECEASED, etc. Use a 1 for Yes and a 0 for No

Multiple Choice Custom Fields - Use the Option Value you assigned when creating the Multiple Choice selections. This may not be the same as the displayed value - as the Option Label is displayed in select fields and when viewing the contact record.

You can search for matches on multiple Groups, Tags or other ID values using the IN operator. For example, if you want to find contacts who are members of either the Newsletter Subscribers group (Group ID=1) or the Advisory Board group (Group ID=3), you could enter:

Individuals -> Group(s) -> IN -> (1,3) Remember to Surround your set of values with

parentheses, and do NOT use spaces between the comma-separated values.

Just like other searches, you can save your Search Builder search as a Smart Group. For more information on Smart Groups, see the Groups and Tags chapter.

Custom search

Custom searches are designed to answer specific questions that can't be easily answered using **Advanced Search** or **Search Builder**.

Go to **Search > Custom Search** in the navigation menu and look at the list of available custom searches. These customised searches have been written by members of the CiviCRM community to meet their own needs, and then contributed back to the community to share with others who need the same or similar custom searches. It's worth spending some time exploring these searches as some may be useful to you, and they will give you an idea of the sorts of things that are possible.

A good example is the **Include/Exclude Contacts in a Group/Tag**.

By combining Include and Exclude options, you can find contacts who are in one group but remove just the group members who fit another criterion. For example, you may want to find all the contacts who are Newsletter Subscribers but exclude members of Advisory Board, perhaps to create a new mailing list to receive a message targeted at the most external circle of your constituents.

The screenshot shows the CiviCRM Search Builder interface. At the top, it says 'CiviCRM' and 'Edit Search Criteria'. Below this is a 'Search' button. The interface is divided into four main sections: 'Include Group(s)', 'Exclude Group(s)', 'Combine With (AND, Uncheck For OR)', and 'Include Tag(s)'. Each section has a list of items on the left, a list of items on the right, and 'Add >>' and '<< Remove' buttons. The 'Include Group(s)' section has a list of 'Administrators', 'Case Resources', 'My band', 'Summer Program Volunteers', and 'Advisory Board' on the left, and 'Newsletter Subscribers' on the right. The 'Exclude Group(s)' section has a list of 'Administrators', 'Case Resources', 'My band', 'Newsletter Subscribers', and 'Summer Program Volunteers' on the left, and 'Advisory Board' on the right. The 'Combine With (AND, Uncheck For OR)' section has a checked checkbox for 'AND'. The 'Include Tag(s)' section has a list of 'Company', 'Government Entity', 'Major Donor', 'Non-profit', and 'Volunteer' on the left, and an empty list on the right. There is also an 'Exclude Tag(s)' section with the same list of tags on the left and an empty list on the right. At the bottom, there is a 'Search' button.

There are many additional custom searches created for various purposes, including a search on aggregate contributions of contacts, a search on contacts within X miles/kilometers of a certain geographical area, and more. Here's a short description of the custom searches a

Contribution Aggregate: find aggregate totals of contributions from contacts within a range of dates.

Basic Search: search on contacts by contact type, group, and/or tag

Household Name and State: search households in a U.S. state

Postal Mailing: search for contacts in a given group and results display with mailing information. Use this search to batch update contact information, send an email, export contacts, or other actions.

Proximity Search: search for contacts located within x miles/kilometres of a specific geographical area.

1. Go to **Search > Custom Searches > Proximity Search**.
2. Enter the distance in miles or kilometres.
3. Enter the country within which you want to search.
4. Enter any other parameters you wish to give your search.
5. Click Search.

1. Go to **Search > Custom Search > Contributions made in Year X and not Year Y**

2. None of the fields are required; you can choose whether to search a specified amount range as well as a time period, and whether you want to exclude minimum or maximum amounts.

Find Contribution Amounts by Tag: search on any tag for contributions within a range of dates.

Event Aggregate: search on event-related payments for a given event and

Price Set Details for Event Participants: get detailed information about which participants opted for which different paid options related to an event. For example, see who paid just the event fee, who paid for the additional workshop, and who paid for dinner.

Zip Code Range: find contacts in a specified zip code or postal code range. This is useful for targeted mailings or conducting surveys in a particular geographical area.

1. Go to Search > Custom Searches > Zip Code Range Search.

2. Enter the start and end range of the zip or postal codes.

3. Click Search.

Date Added to CiviCRM: search for contacts that have been added within a particular time period.

Checking this box allows you to enter multiple sets of values for a given contact.

Custom Group Multiple Values Listing: a special search for custom data best illustrated with the following example:

Checking this box allows you to enter multiple sets of values for a given contact.

EXAMPLE: When creating a set of custom fields used to collect **Employment History** - you might have fields for Job Title, Start Date, End Date, and Reason for Leaving. Checking the "multiple records" box allows you to collect information for multiple jobs.

You can also set the maximum number of records which can be recorded per contact. Using the previous example, you might only want data for the three most recent jobs.

CAUTION: The following features are NOT available for custom fields in 'multiple record' custom set:

- These fields can not be used in Profiles
- They can not be Imported or Exported
- If they are included in a report as a display column, only the first set of values are shown.

It is possible to write your own custom searches, but you'll need to be comfortable with MySQL and PHP. See the CiviCRM Developer Guide for more information about how to do this. If you create a custom search that you think could be useful for others, consider contributing it back to the community.

Please note: Documentation is needed for each of the custom searches. If you are developing additional custom searches, please contribute them with accompanying documentation so others will be able to take advantage of the functionality you have added.

19. IMPORTING DATA INTO CIVICRM

Most organisations have data in sources outside CiviCRM, such as previously used database platforms, spreadsheets created on the fly for specific events or other purposes, and email address books. Because manually entering large amounts of data can be tedious, CiviCRM provides a way to import data en masse if the source can export it into some common format such as a Comma Separated Version (CSV) file.

CONSIDERATIONS BEFORE IMPORTING

It might be useful to think about your pre-existing data in the same way as the contents of a house or apartment when you need to move. People often use moving as a chance to say, "Do we really need this? This stuff is too old; let's trash it and get some new stuff once we have moved in."

To apply this metaphor to your data, look for fields that have no purpose, such as old organisational divisions that you've abandoned or office locations in a facility you no longer occupy.

Some old data will have continuing value. For instance, one organisation in a financial pinch decided to use an old list of founding donors who had not given money for many years. It turned out that these lapsed donors still had strong emotional ties to the organisation that they had founded and they came to its financial rescue. In that case, saving old data was crucial.

Moving to a new living space doesn't just provide an opportunity to evaluate what's really important to keep and what can be left behind; it also gives you a chance to clean up everything that you do decide to take with you. Just as you wouldn't pack up dusty picture frames and dirty dishes because that would make your nice new clean place as dirty as your old place, you'll want to clean up your data *before* moving it into CiviCRM so that you're starting off with as clean and useful a database as possible.

In planning for a move to CiviCRM, prepare to spend a good amount of time looking at your old data; standardising how different elements of contacts' records are stored (e.g. are states entered as NY or New York?) and deleting obvious duplicates, accidental entries, outdated information, and corrupted records.

PREPARING TO IMPORT DATA

Importing data requires considerable attention and care, so we'll present some concepts here that you should know before you start your first import. You can import both core and custom data for contacts, as well as data for event attendance, activities, memberships and contributions. This chapter focuses solely on the import process for contacts, though the processes for other data are similar.

There are two ways to import data:

- from CSV files. Most database and spreadsheet applications (e.g. OpenOffice.org Calc, Google Spreadsheets, Microsoft Excel) can create and manipulate files in this format. It is often easier to view and clean your data when it's in a CSV file than while it's still inside your old database.

Each column in your CSV file will map to a field in CiviCRM, so make sure you use a different column for every distinct bit of information.

Depending on your country or region, fields in your CSV files might be separated by semicolons (;) instead of commas. If so, you'll need to change the Import/Export Field Separator value in the CiviCRM Localization settings by going to the navigation menu and choosing Administer > Configure > Global Settings > Localization.

- from another SQL or MySQL database stored on the same server, using an SQL query.

If you do not have a clear understanding of your existing data and how it will map to CiviCRM fields, you will experience frustrations and problems when you try to import the data. Please read about each type of data in other sections of this CiviCRM Manual and visit the CiviCRM online documentation for more information:
<http://wiki.civicrm.org/confluence/display/CRMDOC/Importing+Data>

The following rules and recommendations will help you to import data with minimal problems:

- Always test your data import with a small subset of your records. After importing the test set, visit the records within CiviCRM and ensure that the data was imported and functions as you expected.
- It can be helpful to create a test contact that has every attribute you've defined in your existing data set. Then import the contact and check results to ensure that CiviCRM correctly represents all the data.
- When you map the columns or fields from your source data to CiviCRM fields during the import, CiviCRM can save this field mapping as an *import map* for future use. This is helpful if you will be importing multiple files with the same structure. To save an import map for future use, click the "Save this field mapping" check-box at the bottom of the Match Fields screen of the import wizard and enter an appropriate name and description. To reuse a saved import map, select it from the Load Saved Field Mapping dropdown menu on the Choose Data Source screen (step 1) of the import wizard.
- If your imports are timing out or taking too long, try splitting up the imports into smaller batches. If you have the appropriate permissions on your web server, you can also increase the `memory_limit` and `max_execution_time` values in the file `php.ini`.
- You can add all of the contacts imported in an import to new or existing groups or tags. All of the contacts in a single import will be given the same groups and tags. This limitation has a couple effects on your import:
 - Make sure that you assign groups and tags that are applicable to every contact in the imported set. If you need to assign groups or tags on a contact-by-contact basis, import contacts in small, discrete batches in which all contacts share the same tags and groups. Alternatively, you can create searchable custom data fields in CiviCRM that contain the groups and tags that you want to assign to imported contacts. After the import you can run searches on those fields and use the "Add Contacts to Group" or "Tag Contacts" batch actions on the search results.
 - You can use this feature to manage the import. Consider adding contacts to a new group or tag that indicates what batch of imports the contacts were a part of, thereby allowing you to easily identify when a contact was imported and undo an entire import if necessary.
- CiviCRM stores first names and last names in separate fields, so these should appear as separate columns in your CSV file. The same goes for city and postal code/zip code. Most spreadsheet programs contain tools that automate the process of splitting text across fields.
- Ensure that your country names are expressed in the same way as they are in CiviCRM, i.e., 'United States', not 'United States of America', and 'United Kingdom', not 'Britain'.
- If you are importing multiple locations, the first location will be set as the primary location address. You may want to move your columns around to ensure that the desired location becomes the Primary Location. You may also need to split your import so that some records have one type of record as their Primary Location, while others have a different one.
- If you are importing data into multi-choice (e.g. check-box or radio button) custom fields, your data source can use either the label (what's visible to the user in the CiviCRM front end) or the value (what's actually stored in the database for that choice). CiviCRM will recognise it and import it appropriately. When importing into multi-choice core data fields, you can specify only the value(s) in your data source, not the label.
- If you are updating multiple choice options, new values will replace the entire field. For example, if you update the value of the Colors field to be "orange" for a contact that currently has Colors set to "blue", the result will be that Colors is set to orange, not orange and blue.
- Make sure your data source uses an accepted date format and that you select the same date format on the Choose Data Source screen of the import wizard.
- Make sure any name prefixes and suffixes you use have been set up in the administration interface (go to: Administer > Option Lists in the navigation menu).
- If you plan to do additional imports of related data that's associated with your contact data, e.g. contribution data, event participation data, membership data, you can make things easier by ensuring that your contact records have unique IDs that are also associated with the related data. When you do the initial import of your contact data, import these unique IDs and map them to CiviCRM's External ID field, so that you can then use your original (or legacy data) IDs to match to the contact records records for later imports of the related data.

SETTING UP A CSV FILE FOR IMPORTING

First Name	Last Name	Grade	Student Number	Contact SubType	Father First Name	Father Last Name
Yonce	Johns	1	Student-111	Student	Meeka	Colla
Sophia	Camp	1	Student-112	Student	Jan	Rodney
Bel	Jason	1	Student-113	Student	Jillie	Jason
Lizzy	Bell	1	Student-114	Student	Martia	Bell
Helen	White	1	Student-115	Student	Karen	White
Isaac	Bell	2	Student-221	Student	Martia	Bell
Josie	Zen	2	Student-222	Student	Betty	Zen
Jenny	Zen	2	Student-223	Student	Betty	Zen
Anni	Stinson	2	Student-224	Student	Maggie	Stinson
Shane	Stinson	2	Student-225	Student	Maggie	Stinson
Al	Jason	3	Student-333	Student	Jillie	Jason
Ella	White	3	Student-334	Student	Karen	White
Greg	Camp	3	Student-335	Student	Jan	Rodney
Smita	Johns	3	Student-336	Student	Meeka	Colla
Lee	Stinson	3	Student-337	Student	Maqqie	Stinson

When thinking about setting up your spreadsheet, think about the data that you are collecting and plan out your column headings. Keep in mind that you may need to create more than one .csv file and perform multiple imports before you are finished.

If you plan to import related data that pertains to a specific contact, e.g. event participant information, contribution data, etc., you will need to make sure that each contact record has a unique identifier or the contact record should have First Name, Last Name and Email, so that you can link their related data during later imports. If you have unique ID, you would map the ID to CiviCRM's External Identifier on import.

RUNNING AN IMPORT

The import process has four steps.

Step 1: Setup

Setup lets you specify the basic details of your import, including the source of the data. Data can come from either a CSV file, or an SQL query of a database on your server. A check-box lets you indicate whether the first row of your file contains column headers.

Import Contacts

The Import Wizard allows you to easily import contact records from other applications into CiviCRM. For example, if your organization has contacts in MS Access® or Excel®, and you want to start using CiviCRM to store these contacts, you can 'import' them here.

» 1. Choose Data Source

2. Match Fields

3. Preview

4. Summary

Choose Data Source (step 1 of 4)

Choose Data Source

Data Source *

Comma-Separated Values (CSV)

The Import Wizard allows you to easily import contact records from other applications into CiviCRM. For example, if your organization has contacts in MS Access® or Excel®, and you want to start using CiviCRM to store these contacts, you can 'import' them here.

Upload CSV File

Import Data File *

Sample Data/Student_Sample_Data.csv
Browse...

File format must be comma-separated-values (CSV). File must be UTF8 encoded if it contains special characters (e.g. accented letters, etc.).

Maximum Upload File Size: 2 MB

☒ First row contains column headers

Check this box if the first row of your file consists of field names (Example: 'First Name','Last Name','Email')

Imports use the default strict rule to decide whether a contact record is a duplicate (refer to the Deduping and Merging chapter in this section for information on duplicate matching rules in CiviCRM). You can specify what action to take when an import encounters a duplicate:

- Skip: skip the duplicate contact, i.e. leave the original record as it is.
- Update: update the original record with the database fields from the import data. Fields that are not included in the import data will be left as they are.
- Fill: fill in the additional contact data, if it contains fields that are missing or blank in the original records, and leave fields which currently have values as they are.
- No Duplicate Checking: this inserts all valid records without comparing them to existing contact records for possible duplicates.

Import Options

Contact Type

☒ Individual
 ☐ Household
 ☐ Organization
 ⓘ Subtype

-Select-

 ⓘ

For Duplicate Contacts

☐ Skip
 ☒ Update
 ☐ Fill
 ☐ No Duplicate Checking ⓘ

Date Format

☒ yyyy-mm-dd OR yyyyymmdd (1998-12-25 OR 19981225) OR (2008-9-1 OR 20080901)
 ☐ mm/dd/yy OR mm-dd-yy (12/25/98 OR 12-25-98) OR (9/1/08 OR 9-1-08)
 ☐ mm/dd/yyyy OR mm-dd-yyyy (12/25/1998 OR 12-25-1998) OR (9/1/2008 OR 9-1-2008)
 ☐ Month dd, yyyy (December 12, 1998)
 ☐ dd-mon-yy OR dd/mm/yy (25-Dec-98 OR 25/12/98)
 ☐ dd/mm/yyyy (25/12/1998) OR (1/9/2008)

Select the format that is used for date fields in your import data.

Load Saved Field Mapping

- select -

Select Saved Mapping or Leave blank to create a new One.

Continue >>

Cancel

Import mappings tell CiviCRM how the fields of data in your import file correspond to the fields in CiviCRM. The first time you import from a particular data source, it's a good idea to check the box to "Save this field mapping" at the bottom of the page before continuing. The saved mapping can then be easily reused the next time similar data is imported, by requesting that it be loaded at this step.

Step 2: Match the fields

If you had column headings in your file, these headings will appear in the first column on the left-hand side of the Field Map, while the next two columns show two rows of data in your file to be imported, and the fourth column is the Matching CiviCRM Field. If you loaded an import mapping in Step 1, your choices will be reflected here. You can change them if they are inappropriate for this import.

√1. Choose Data Source

»2. Match Fields

3. Preview

4. Summary

Match Fields (step 2 of 4)

Column Names	Import Data (row 1)	Import Data (row 2)	Matching CiviCRM Field
Title	MS	Mr	Individual Prefix
First Name	Paula	Peter	First Name *
Middle Name	A	William	Middle Name
Last Name	Smarts	Smarts	Last Name *
Nick Name		Pete	Nick Name
Email	psmarts@gmail.com	petesmarts@gmail.com	Email * Home

The matching CiviCRM fields include standard CiviCRM data such as First Name and Last Name as well as any custom data fields that have been configured for use with contact records on your site. Match the fields by clicking the dropdown list and selecting the appropriate data. For example, if the heading of the second column in your input is Surname, you should choose Last Name as your Matching CiviCRM Field.

Select "- do not import -" for any columns in the import file that you don't want to import into CiviCRM.

If you have a saved mapping for a specific set of spreadsheet columns, and your spreadsheet layout has changed (for instance, you need to import additional fields, so you add the appropriate columns of data in the spreadsheet), you can modify and save the field mapping. One tip to ease the mapping process when you need to import additional fields is to place the additional columns of data in your import spreadsheet to the right of the columns you've previously mapped in CiviCRM. This allows you to use the existing saved field mapping to map the initial import fields, and then continue mapping the new data fields.

☒ Save this field mapping

Name

Student

Description

Sturition

<< Previous

Continue >>

Cancel

Note that if you add new data columns in your spreadsheet and do not position the columns AFTER the columns you previously mapped, you then can't use the saved mapping and will have to map all your import fields again.

Once you've mapped your fields, you can decide if you want to keep the original saved mapping unchanged, or check the box to "Update this field mapping" to include the new field mappings.

Step 3: Preview

This screen previews the results of importing your data, reports the number of rows to be imported, and allows you to double check your field matches.

If some of the rows in your spreadsheet contain data that doesn't match CiviCRM's requirements for one or more fields, you'll see an error message with a count of the invalid rows (see the screenshot below). Click the Download Errors link and review the errors reported in the downloaded file, so you can fix them before doing the import.

Preview (step 3 of 4)		
Total Rows	6	Total number of rows in the imported data.
Rows with Errors	6	Rows with invalid data in one or more fields (for example, invalid email address formatting). These rows will be skipped (not imported). » Download Errors
Valid Rows	0	Total rows to be imported.

At the bottom of the form, you can choose to add the contacts to an existing group, import to a new group, create a new tag, or tag imported records. Adding imported records to a separate group is strongly recommended in order to be able to quickly find the imports and, if necessary, delete and reimport them.

Home Phone	415-586-1000	415-282-5000	- do not import -
Fatheremail	rello@sbcglobal.net	jrody@yahoo.com	- do not import -
Motheremail	c3jon@yahoo.com	dean@tworks.com	- do not import -
Grade SIS	1	1	Grade SIS :: School Information

▸ Add imported records to a new group

▼ Add imported records to existing group(s)

Keeping Up with the Joneses
Newsletter Subscribers

School

Student_Parent

Summer Program Volunteers

▸ Create a new tag and assign it to imported records

▸ Tag imported records

<< Previous Import Now >> Cancel

Step 4: Summary

The final screen reports the successful imports along with Duplicate Contacts and Errors. If you have set the import to add all contacts to a Group or Tag, you can click through to see your imported contact records.

Import Contacts

Import has completed successfully. The information below summarizes the results.

√1. Choose Data Source

√2. Match Fields

√3. Preview

»4. Summary

Summary (step 4 of 4)

Total Rows	15	Total number of rows in the imported data.
Total Contacts	15	Total number of contact records created or modified during the import.
Import to Groups	School: 15 contacts added to this existing group.	

Done

At this point it makes sense to check to make sure that your import has worked as expected. Search for the contacts that you just imported and examine their fields and custom data to make sure all is as expected.

IMPORTING RELATIONAL DATA

We have just described the process of importing one data file. But what about if you want to import related data, like parent child relationships, activities, contributions, etc.? For each type of data you want to import, you will need to import a separate CSV file.

CiviCRM has specific tools for importing related contact data and a set of specific import tools for contributions, memberships, event participation etc. (and you should see specific chapters for details of how to use these tools). To import relationships, you should run multiple contact imports.

For example if we want to import data for children and then for both parents, we run three imports, one for the child, one for the father and one for the mother.

We first import the child remembering to include an external identifier that we can use to match the child to their parents. We then import the father, and then the mother, as related contacts, linking them to the child using the child's external identifier.

In the example below we have one CSV file which contains father and mother information. We use this CSV file twice as part of the import. Have a look at the fields below to understand what is happening.

Import Contacts

Review the values shown below from the first 2 rows of your import file and select the matching CiviCRM database fields from the drop-down lists in the right-hand column. Select '- do not import -' for any columns in the import file that you want ignored.

If you think you may be importing additional data from the same data source, check 'Save this field mapping' at the bottom of the page before continuing. The saved mapping can then be easily reused the next time data is imported.

√1. Choose Data Source

»2. Match Fields

3. Preview

4. Summary

Match Fields (step 2 of 4)

Column Names	Import Data (row 1)	Import Data (row 2)	Matching CiviCRM Field
First Name	Yonce	Sophia	First Name *
Last Name	Johns	Camp	Last Name *
Grade Level	1	1	- do not import -
Student Number	Student-111	Student-112	External Identifier *
Contact SubType	Student	Student	- do not import -
Father First Name	Meeka	Jan	Child of First Name *
Father Last Name	Colla	Rodney	Child of Last Name *
Contact SubType	Parent	Parent	Child of SubType :: School Information

We are linking the father to the original child using the external identifier and are then importing the related father name using the 'Child of' relationship type.

Mother First Name	Cento	Dean	- do not import -
Mother Last Name	Johns	Camp	- do not import -
Contact SubType	Parent	Parent	- do not import -
Home Phone	415-586-1000	415-282-5000	Child of Phone Home Phone
Fatheremail	rello@sbcbglobal.net	jrody@yahoo.com	Child of Email * Home Email
Motheremail	c3jon@yahoo.com	dean@tworks.com	- do not import -
Grade SIS	1	1	- do not import -

☒ Save this field mapping

Name

Parent 1

Description

Parent 1

<< Previous

Continue >>

Cancel

When the import is done, go back and verify the data by searching for the parent and examining the relationship tab. They should have a relationship linking them to the child.

You can then repeat this process for the mother, and also for other relationships as necessary.

ADDRESS STANDARDISATION

For many organisations, an important element of cleaning your data is standardising addresses. In the US, this means conform to conventions defined by the United States Postal Service's Standards for Addresses. Standardising how addresses are entered into CiviCRM will allow for more accurate search results when searching by address, as CiviCRM can parse addresses based on the USPS standards if you choose to do so. To find out more about how Address Parsing is handled and used in CiviCRM, refer to the Installation chapter of the Configuration section of this manual. When adding or editing contacts, you will enter and edit such address elements as street number, street name, and Apt/Unit/Suite number according to these standards.

To find out more details about the USPS' Standards for addresses, refer to their Publication 28 at <http://pe.usps.com/text/pub28/welcome.htm> or <http://pe.usps.com/cpim/ftp/pubs/Pub28/pub28.pdf> for the pdf version.

20. EXPORTING YOUR CONTACTS

Exporting lets you share data with external applications by providing a copy of data from CiviCRM in a standard comma separated value (CSV) format. This format can be viewed and edited in spreadsheet applications, imported into other database applications, or merged with word processing documents.

You can either export a predefined set of fields or create your own custom export mapping which can be saved for reuse.

CiviCRM's export functionality is available:

- in any of the search tools
- when viewing contacts in a group
- in component-based search results, where the resulting records reflect the component specific data rather than simply core contact data. For example, from the **Contributions > Find Contributions** search, you could export your donors and their contact information for use in a thank-you letter in which the total amount donated is included.

Here's how you can export contact information:

1. Search for contacts. Carry out a search based on your desired criteria using one of the available search tools, e.g. Quick search, Find Contacts, Advanced search, Search Builder, or a custom search (you can find out more about performing searches in the Searching chapter earlier in this section).
2. Select contacts you wish to export. Select all records, or choose individual records for export using the check-boxes to the left of each record.
3. From the **- actions -** dropdown menu, choose **Export Contacts** as shown in the following figure.
4. Click **Go**. This takes you to the export wizard.

85 Results

Select Records: ☐ All 85 records ☒ Selected records only

Print **Export Contacts** **Go**

- actions -

- Add Contacts to Event
- Add Contacts to Group
- Add Contacts to Household
- Add Contacts to Organization
- Batch Update via Profile
- Delete Contacts
- Export Contacts**
- Mailing Labels
- Merge Contacts
- New Smart Group
- Print PDF Letter for Contacts
- Record Activity for Contacts
- Remove Contacts from Group
- Schedule/Send a Mass Mailing
- Send Email to Contacts
- Tag Contacts (assign tags)
- Unhold Emails

	Address	City	State	Postal
161C El Camino Ln SW	Burlington	WV	26710	
662M El Camino Ln SE	North Star	MI	48862	
846H Second Blvd N	Knoxville	GA	31050	

5. **Export primary (default) or selected fields.** Choose between exporting the primary fields or selecting your own set of fields for export. The primary fields include all core contact fields with email, phone, and address data.
6. If this is satisfactory, click **Continue** and skip step 7 of this list. If you want to add or remove fields to be exported, choose **Select fields for export** and continue with step 7. The default export uses primary location data, so if you wish to export non-primary addresses you need to select fields for export and explicitly specify the address type
7. **Select Fields to Export Choose the fields you want to export.** CiviCRM allows you to save this export mapping, which enables you to reuse the export field mapping at a later time. To save your selection of fields, click **Save this field mapping** at the bottom of the form and enter a descriptive name for this type of export.

Fields to Include in Export File

Individual	Sort Name
Individual	Communicat...: Best time to Contact
Individual	Voter Info: Precinct
Individual	Phone

Primary

8. **Click Export to create your CSV file.** By default, a comma is used as the field separator for import and export functions. In some locales, other characters are used (e.g. a semi-colon). You can change the separator value by going to **Administer > Configure > Global Settings > Localization** and modifying the Import/Export Field Separator.

1. Find Contacts

2. Export All or Selected Fields

3. Select Fields to Export

Export All or Selected Fields (step 2 of 3)

Export PRIMARY fields provides the most commonly used data values. This includes primary address information, preferred phone and email.

Click: **Select fields for export** and then **Continue** to choose a subset of fields for export. This option allows you to export multiple specific locations (Home, Work, etc.) as well as custom data. You can also save your selections as a 'field mapping' so you can use it again later.

3 records selected for export.

☒ Export PRIMARY fields

☐ Select fields for export

Continue >>

Cancel

21. DEDUPING AND MERGING

Duplicate contacts can turn up in your data for many reasons, such as mistakes by users who don't realise they're creating a contact for someone who is already in CiviCRM, duplicates that aren't caught in the import process and duplicate records created when people fill in forms about themselves (maybe with their names spelled differently or with a different email address) on your site without realising they're already in your list of contacts.

CiviCRM is equipped with duplicate matching rules that are applied automatically when new contacts are created, and can be run manually at any time to search for duplicates. You can configure these rules to suit your needs.

To view the dedupe rules, go to **Contacts > Find and Merge Duplicate Contacts** in the navigation menu. This displays the following screen:

Find and Merge Duplicate Contacts

Manage the rules used to identify potentially duplicate contact records. Scan for duplicates using a selected rule and merge duplicate contact data as needed. ⓘ

Name	Contact Type	Level	Default?	
	Household	Strict	✓	Use Rule Edit Rule
	Household	Fuzzy	✓	Use Rule Edit Rule
	Individual	Strict	✓	Use Rule Edit Rule
	Individual	Fuzzy	✓	Use Rule Edit Rule
	Organization	Strict	✓	Use Rule Edit Rule
	Organization	Fuzzy	✓	Use Rule Edit Rule

[+ Add Dedupe Rule for Individuals](#)

[+ Add Dedupe Rule for Households](#)

[+ Add Dedupe Rule for Organizations](#)

Access Key

From the screen, here's an example of a process to dedupe all individuals in your data:

1. Start by looking for dupes using a strict rule: click the **Use Rule** link for the third row (Contact Type: Individual, Level: Strict).
2. Select **All Contacts** or a particular group.
3. Click **Continue**.
4. If duplicates are found, merge or delete the duplicate contacts.
5. Now look for dupes using a fuzzy rule to find those dupes that were missed with the stricter rule: Click the **Use Rule** link for the fourth row (Contact Type: Individual, Level: Fuzzy).
6. Select **All Contacts** or a particular group.
7. Click **Continue**.
8. If duplicates are found, merge or delete the duplicate contacts.

Different rules are configured for each contact type (individuals, organizations, and households.) A default fuzzy rule and a default strict rule is set for each contact type. The default rules are used when CiviCRM invokes automatic checking, in ways we'll explain in detail shortly.

STRICT AND FUZZY RULES

CiviCRM includes two categories of dedupe rules:

- **Strict:** this type of rule places a priority on avoiding false matches, and therefore applies relatively rigid criteria. It is therefore possible to sometimes miss real duplicates.

Strict rules are invoked during imports to scan for duplicates without user intervention. These rules are used here because it is easier to sort out duplicates later than to disentangle two incorrectly merged contacts.

An example of a strict rule is one that matches individual contacts only if three criteria are met: identical email addresses, first names, and last names. This rule would allow both Mike Tael and Michael Tael into the database because only two criteria are met: last name and email rather than first name, last name, and email.

Default strict rules are also automatically checked when new contacts are created through online registrations including events, membership, contributions, and profile pages, and when you create a contact through CiviCRM's programming API.

- **Fuzzy:** this type of rule has a relatively loose definition of matches in the hope of catching as many possible duplicates as possible.

Fuzzy rules are used in instances where human intelligence can be applied to decide whether a match is accurate. This means that a wider range of possible match results is both permissible and useful.

Default fuzzy rules are automatically used to check for possible duplicates when contacts are added or edited via the CiviCRM user interface (the default strict rules are automatically used when contacts are added or edited via a Profile, the API, or on import). You'll probably also want to use a fuzzy rule when scanning your database for possible duplicates.

CONFIGURING RULES

To determine whether two contacts are duplicates, CiviCRM checks up to five fields that you can specify. You can also set a length value which determines how many characters in the field should be compared. For example, if you set a length of 2 on the **First name** field, a first name of "Mike" would match "Michael" and they would be recognized as duplicates, because the first 2 characters are the same. However, if you set the length to 3 instead, "Mike" would no longer match "Michael" and they would be accepted as different contacts. If the length value is left blank, the comparison is done on the entire field value.

Each field is also configured with a numeric weight that determines the relative importance of a match on that field. When a match is discovered on a field, that field's weight is added to the total weight for the rule. After each field is checked, if the total weight is equal to or greater than the numerical threshold set for the rule, the contacts being compared are flagged as suspected duplicates.

USING RULES AND MERGING DUPLICATE CONTACTS

1. Go to **Administer > Manage > Find and Merge Duplicate Contacts**.
2. Click the **Use Rule** link to scan for duplicate contacts using the selected rule.
3. You can then select to search all contacts for duplicates or to search only a particular group. Contacts of the type to which the rule is assigned will be scanned and compared. If the match between two contacts exceeds the rule's threshold, the contacts will be displayed on the following screen of possible duplicates.
4. Clicking **Merge** for any pair of contacts brings up a table showing details for each contact. CiviCRM designates one record as the duplicate record and displays its information in the left column. The record in the right column is considered the original record into which selected data from the duplicate record will be merged.
5. If you want to move the information in the opposite direction, you can swap the duplicate and original contacts by choosing **Flip between original and duplicate contacts**.
6. For each field, you can choose whether to keep the original data shown on the right (don't check the check-box in the middle column), or use the value from the duplicate contact instead (check the box). For the email addresses or phone numbers, you can decide to keep both the value of the duplicate and of the original (check both the checkbox in the middle column and the "add new" on the right column) to copy the duplicate data. Note that associated tags, groups and activity data (including event attendance, contributions, etc.) will appear *in addition* to data already recorded in the original record, not in place of it. It is safer in general to keep the tags, groups and activities of both contacts after the merge.

MERGING CONTACTS FROM SEARCH RESULTS

If you notice duplicate contacts within a set of search results you can quickly merge them directly from the search results instead of using the separate **Find and Merge Duplicate Contacts** process. This is a great way to clean up your database during your everyday workflow with minimal disruption.

1. Select the duplicate contacts from your search results by clicking the check box at the left side of each record.
2. Select **Merge Contacts** from the - **more actions** - menu.
3. Click **Go**.
4. Follow the normal steps for merging duplicate contacts.

22. TOKENS AND MAIL MERGE

You can use data in your CiviCRM database to set up mail merge communications both for emails and printed materials such as letters and mailing labels. The mail merging functionality relies on Tokens which represent items in your database. This chapter explains how tokens work and how to use them in generating printing materials. Using tokens in emails and mass mailings is covered in the Email section.

TOKENS

Tokens perform the equivalent of mail merge in CiviCRM. This means that it is possible to insert information from the database into an email or a letter that is different for every recipient. Tokens are accessible via the **Insert Token** link in the top right corner of the message editing area.

Most of the tokens contain information that is in the database fields. However, there are some special tokens that accomplish specific tasks such as a link to an optout page or link to choose mail formats. Some tokens are only available for mass mailings such as the token to provide a link to a message stored online.

Only contact fields and actions can be inserted in your email as tokens. Related records, such as the name of the event for which the contacts have pending enrollments, cannot be included. However, in emails, you could provide a link to the person's contact dashboard so that they can review their registration details for themselves (once logged in). In emails, you can also use a checksum token that generates a unique URL for each contact so they can modify their information without having to login.

See here for details on using Checksums:

<http://wiki.civicrm.org/confluence/display/CRMDOC/Mail-merge+Tokens+for+Contact+Data>

It is also possible to have custom tokens created by a developer. For instance, the total amount of contributions from a contact. To find out more about working with custom tokens, refer to the discussion about custom mail merge tokens in the Hooks chapter of the Extending CiviCRM section of this book and look at the wiki:

<http://wiki.civicrm.org/confluence/display/CRMDOC/Mail-merge+Tokens+for+Contact+Data>.

Another task for a developer is to create if/then logic for your mail merge. This is done using the smarty template language as described here

<http://www.smarty.net/docs/en/language.function.if.tpl>.

POSTAL MAIL COMMUNICATIONS

This chapter discusses the different ways that CiviCRM helps with postal mail and post mail campaigns. It will help if you already have a strong understanding of CiviCRM's search features as well as custom fields, activities, profiles, and how to perform mail merges using word processing software.

Planning Your Mailing

Before beginning any communication activity, take the time to identify your goals and plan the steps. For our purposes, there are a few key questions to ask before sending out postal mailings.

- What types of mailing do you send out to your constituents?
- Are mailings always sent to everyone in the database or are they frequently targeted to a select group of contacts?
- How do you want to greet recipients (e.g. "Dear Jane" or "Dear Jane Doe")?

There are three ways that you can use CiviCRM in postal mailings:

1. Generate labels: print out standard address labels when you don't need to personalise the content, for instance to send a printed brochure.
2. Export contacts and do a mail merge to an external tool (such as OpenOffice or Microsoft Word). Refer to the chapter on Exporting in the Getting Around section.
3. Generate PDF letters and do the merge directly in CiviCRM.

Many nonprofit organisations in the USA need to sort recipients of a mailing based on zip code for bulk mailing purposes. If this is true for your organisation, it is recommended that you create your mailing labels using a word processor where you can control the sort order, rather than in CiviCRM. You can reuse the same spreadsheet for your mail merge.

Greetings and salutations

You can set a specific postal greeting format for each contact. There are several options from the friendly "Dear John", to more formal "Dear Mr. John Doe". You can also enter a *customized greeting* ("Your royal highness"). Postal greetings can be edited in the Communications Preferences section of the contact edit form. If you need to set or reset postal greetings en mass, refer to the Command Line Script Configuration documentation:

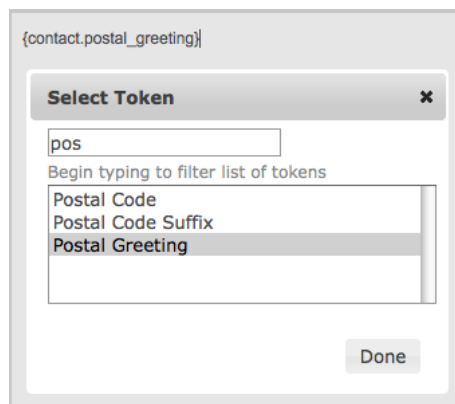
<http://wiki.civicrm.org/confluence/x/LK9AQ>

Print PDF letters

The workflow is to first select the group you want to target, then choose the action "Print PDF letter" from the dropdown menu. The letters will then be outputted as a PDF, allowing you to easily print them.

To create the letter:

1. Go to **Search > Find Contacts or Find Contacts > Advanced Search**.
2. Enter your search criteria and click Search.
3. Select the contacts who will receive the letter.
4. From the Actions dropdown menu, choose "Print PDF Letter for Contacts" and click Go.
5. Create your letter, using the formatting options provided. You can personalise the letter by using tokens, for example Postal Greeting is a commonly used token in this situation. Click in the body of the letter where you want to enter the token. Then click on "Insert Tokens" located above the letter at the top right and select the desired token.
6. Before you move to the next screen, decide whether the format of this letter could be used again. If so, check the Save New Template box and enter the Template Title.
7. When your letter is finished scroll to the bottom and click Make PDF Letters.
8. A pop-up window will offer the option of opening or saving the PDF. Open and review your letter and then print it, or save the PDF and review at your leisure.



You can use this feature for any kind of document, not only letters. For example, you could use it to print attendance certificates for a workshop.

Generate mailing labels

Generating mailing labels is a very easy and useful function.

1. Perform the search to select the contacts you want to target.
2. Choose **Mailing Labels** from the **Actions** dropdown menu and click Go.
3. Select the mailing label style
4. Determine if you want to exclude people with "do not mail" checked in their privacy options (checked by default and recommended), and whether you want to merge any records with the same mailing address into one label.

This last option is very useful when sending a mailing to a households or organisations where you don't want them to receive duplicate mailings. When the records are merged, each name at that address is listed on a separate line on the label.

Your system administrator can configure the fields included in mailing labels. Read the information on configuring address settings in the Contacts chapter to learn more about the options.

CONTRIBUTIONS

- 23. WHAT IS CIVICCONTRIBUTE?
- 24. WHAT YOU NEED TO KNOW
- 25. PAYMENT PROCESSORS
- 26. PLEDGES
- 27. SET-UP
- 28. EVERYDAY TASKS
- 29. REPORTS AND ANALYSIS

23. WHAT IS CIVICONTRIBUTE?

CiviContribute supports fund-raising and related money management. It has two main uses:

- to facilitate fundraising campaigns and collection of donations, and
- to support activities by other CiviCRM components that have financial elements, such as collecting and recording payments in the Events and Member components.

CiviContribute offers a number of tools for raising money through your web site. For example, you can create contribution pages with fundraising targets. Campaigns support a thermometer style widget that can be embedded on other web sites and blogs. Personal campaign pages (PCPs) and the "tell-a-friend" functionality engage your supporters in raising money for your organisation and give them credit for any money that they raise from other people on your behalf.

Several other CiviCRM components require CiviContribute to be enabled. To use CiviContribute you will need to configure a payment processor.

SCENARIO: CONTRIBUTING TO LEADERSHIP

A community arts group, Arts in Action, conducts leadership workshops for youth aged under 25 throughout the year. They use CiviCRM extensively in the planning and execution of these workshops, combining the features of modules including CiviEvent and CiviContribute to make the administration of the workshops as efficient as possible.

The workshops are funded in three ways: participant fees, local arts funding and donations. Most of the donations are from previous workshop participants who have continued as Arts in Action constituents. Twice a year a call for donations towards the workshops is sent out using CiviMail, providing a link to a donations page on the site. Some donors make regular donations through CiviPledge, while others make one-off donations. A thank-you email and receipt is automatically sent to every donor when a payment is successfully processed. All donations are tagged for the workshops, so that Arts in Action staff can run reports showing total workshop donations and look at individual contact records to see who has donated.

Participants register and pay for the workshops via an online form. There is a flat fee for registration, with additional fees for optional workshops and food and lodging preferences. The participants make these choices in the form and pay with a credit card. If they are not already a contact within the database, a new record is created at the time of registration, and the payment is recorded in that contact's contribution record as well as being linked to the workshop event.

Arts in Action have chosen to enable the "pay later" option, as many of the participants do not have a credit card and need to pay in cash at the workshop. CiviContribute distinguishes between an actual payment and a commitment to pay, and this information is included in the registrants report that is printed out and used on the day to check participant attendance and payment. A computer at the registration desk at the workshop is used to manually input cash and cheque payments to the participant's contribution record.

The "tell-a-friend" option is also enabled, as Arts in Action have assessed that the most effective publicity for the workshop is by word of mouth and participants bringing friends. After completing the registration form, participants can easily forward it via email or social networking platforms to their friends and colleagues who may also be interested in attending.

After every workshop, the Arts in Action accountant generates a report that shows the total income from each of the three sources for the workshop, using a report template. She also tracks trends in donations and ensures that the Board are aware of who the larger donors are.

24. WHAT YOU NEED TO KNOW

This chapter provides information that you need to know before configuring and using CiviContribute. CiviContribute allows you to create online contribution pages that enable your organisation to:

- accept donations and other financial contributions
- process membership signups and renewals
- run specific fundraising campaigns.

Throughout CiviCRM, the term *contribution* refers to any financial transaction or payment taking place in the system such as a donation, event fee payment or membership fee payment.

Start by listing the types of contributions your organisation receives (or wants to receive) and identify which of those you want to track using CiviCRM. Then consider the following concepts and answer the key questions listed below before you begin to work with CiviContribute.

KEY CONCEPTS

Data needs and fields

CiviContribute has a set of predefined fields to track contribution information. If you need to track more information about contributions, you can define and use custom data fields. Custom data might be useful to further categorize your contributions or track additional information.

Write down all the information you want to track about your contributions, including reports (described later in this chapter), then compare your data needs to CiviCRM's predefined fields - an easy way to do this is to look at the screen for adding a new contribution. A lot of useful functionality is built in to the core contribution fields so there's no point in duplicating them with custom fields, but your organisation may have specific needs that require custom fields.

If you do need to create custom fields to meet your needs, see the chapter Creating Custom Fields in the Understanding Your Data section.

Types and accounting codes

CiviContribute categorises contributions by type; examples of contribution types include event fees, membership fees, donations and grants.

To aid integration with your accounting software, you can assign an accounting code to each contribution type. This code is included when you export contributions for import into your accounting package.

KEY QUESTIONS

Before creating a general contribution page, answer the following questions:

- What *contribution type* will be used to categorize contributions received via this page?
- Do you want to allow people to donate in honor or in memory of someone?
- What data do you want to capture from your donors and contributors? The only field required by CiviCRM to process a contribution is an email address, but typically you will want to collect additional contact information for the contributor. This could be collected in predefined CiviCRM fields or custom fields that you have created previously, which can be added using a profile. A contribution page can include up to two profiles. Build the profile *before* you create the contribution page (although you can also complete the page and return at a later time to add a profile).
- Can individuals contribute on behalf of an organization? This is most commonly used for membership sign-up pages (discussed later).
- Do you want to allow people to pledge a certain amount as they contribute? A pledge is a commitment to give a certain amount over a certain period of time - for instance, a fixed amount deducted from a credit card every month. Pledges are a great way to allow your supporters to provide long-term support to your organization.
- What are the amounts you want people to choose from? Some organizations call these "donation levels" and they're important because they give a potential donor a range and suggestions of what to give. You may also allow donors to complete an "other amount" field and ignore your predefined giving levels.
- What text do you want to appear in the following:
 - the introduction of the contribution page
 - the footer of the contribution page
 - the text for the thank-you page
 - the automatic email receipt sent to the contributor (optional).
- Do you want to enable the Tell a Friend feature? This encourages donors to forward the page to friends, which can help to spread your message through their social networks.
- Do you provide premiums such as T-shirts or tote-bags to donors who give over a certain amount? If you do, set up your premiums within the CiviCRM administration pages first.

Once you have resolved all of these questions, you can create your contribution page. The options and settings you choose should map clearly to the answers you gave.

OTHER CONSIDERATIONS

A contribution page is normally one element of a larger campaign or project, therefore it is important to consider its wider context.

Membership Sign-up / Donation Page

CiviContribute is closely integrated with CiviMember, the membership management component of CiviCRM. This means that your online contribution pages enable people to join your organization at predefined membership levels. When people do this, they create not only a membership record for themselves but a corresponding contribution record.

You must create all of your membership types and status settings within CiviMember *before* you build your online membership sign-up page.

Before building your membership sign-up page, you need to answer most of the questions listed in the previous section for the contribution page, and additional questions including:

- Should this page be used *only* for membership sign-up purposes, or can people give general contributions as well? Membership-based organizations usually use their contribution page only for membership sign-up, which means they do not allow a variety of contribution amounts and membership sign-up is required.
- Which membership types allow sign-ups? Some membership types in your organization may be for administrative use only.

If your organization allows organizations as well as individuals to become members, you will need to allow individuals to join on behalf of an organization. Depending on your membership structure, you may want to require this behavior.

Campaign Fundraising Page

- Widgets showing the progress of a campaign towards its goal can be created and embedded on your web site.
- Personal Campaign Pages (PCPs) allow your constituents to create their own fundraising page for your organization. For example, after donating to your organization a donor can elect to create a page with her own photo, text and personal message, then email a link to the page to her networks soliciting support for your organization. This is a powerful way to widely and quickly spread the message about your campaign. CiviContribute has a section that allows you to administer all of the PCPs for your organization as well as moderate PCPs you don't approve of.
- When someone donates through a personal campaign page, a "soft credit" is given to the owner of the page to recognize the role she played in the contribution.
- Lastly, you can provide an "Honor Roll" for your contacts who build PCPs, highlighting the donations made through their pages (donors need to opt in to have their names displayed in the honor roll).



Reporting and evaluation

Reports can support targeted fundraising, reveal ways to improve fundraising methods, and help to measure the financial health of your organization.

As part of the planning process before setting up CiviContribute, consider the reports that would be useful for you to generate. CiviCRM comes with a number of report templates designed to give you information about your donors and fundraising campaigns. Identifying the data required for the reports will help to determine the data you need to collect, and whether you need to create new custom fields for this.

25. PAYMENT PROCESSORS

Using CiviCRM you can accept online card and PayPal payments for events and contributions. There is a wide and growing range of processors available but only a handful are actually distributed with CiviCRM. Check on the wiki at <http://wiki.civicrm.org/confluence/display/CRMDOC/CiviContribute+Payment+Processor+Configuration> or the extensions directory <http://directory.civicrm.org/> to see whether the processor you need is available. There is also a forum board with information on community contributed processors at <http://forum.civicrm.org/index.php?board=38.0>. For many countries there aren't payment processors written that support their currencies while for others there is a choice. Paypal is the most widely available option. If you need to get integration with a particular payment processor, you might ask about this on the forums or approach one of the companies on the professional services page.

SET UP

You can configure one or more Payment Processors for your CiviCRM installation. You will then need to assign an active Payment Processor to each Online Contribution Page and each paid Event. If no Payment Processors have been configured for your site, go to the New Payment Processor form **Administer -> Configure -> Global Settings -> Payment Processors**. On the Payment Processor form:

The screenshot shows the 'New Payment Processor' form in CiviCRM. At the top are 'Save' and 'Cancel' buttons. The 'Payment Processor Type' is set to 'PayPal - Website Payments Pro'. Below this are fields for 'Name' and 'Description'. Two checkboxes are checked: 'Is this Payment Processor active?' and 'Is this Payment Processor the default?'. The form is divided into two sections: 'Processor Details for Live Payments' and 'Processor Details for Test Payments'. Each section contains fields for 'User Name', 'Password', 'Signature', 'Site URL', 'API URL', 'Recurring Payments URL', and 'Button URL'. The live payment URLs are for the main PayPal site, while the test payment URLs are for the sandbox. At the bottom of the form are 'Save' and 'Cancel' buttons.

Choose **Payment Processor Type** from the drop-down list

Assign a descriptive **Name** to this processor configuration and an optional description. This is particularly important if you are configuring multiple merchant accounts for different chapters or sub-organizations within your site.

Make the processor active so it's available to events and contribution pages.

Finally fill in the details of you test and live accounts so you can use it in both test and live environments. You will of course need to do some further set up on the actual payment gateway but that is beyond the scop of this book and should be documented by your gateway.

Once you've done all that, the processor will be available in your paid events and contribution pages.

26. PLEDGES

Within your online CiviContribute donation form, you may allow your constituents to make pledges for future donations. By allowing pledges, donors have the flexibility to choose the frequency in how they will donate. For example, twice a year, twice a month for five months, etc. Some payment processors will not allow this kind of automation and the payments may come in as cheques, electronic payments or whatever else you allow. However, you can record future income against a current source such as an event or email campaign, etc. It also provides an automated mechanism to remind pledgers of their commitment.

Setting up Pledges is a simple part of configuring a contribution page. On the Amounts tab (second screen in the process), select the pledges checkbox and further options will appear like this:

Pledges ☒

Check this box if you want to give users the option to make a Pledge (a commitment to contribute a fixed amount on a recurring basis).

Supported pledge frequencies * ☐ day ☐ week ☐ month ☐ year

Which frequencies can the user pick from (e.g. every 'week', every 'month', every 'year')?

Allow frequency intervals ☐

Can they also set an interval (e.g. every '3' months)?

Send payment reminder days prior to each scheduled payment due date.

Send up to reminders for each scheduled payment.

Send additional reminders days after the last one sent, up to the maximum number of reminders.

Allow other amounts ☐

Check this box if you want to give users the option to enter their own contribution amount. Your page will then include a text field labeled **Other Amount**.

Select the frequency and reminder options and allow other amounts if applicable, and the pledge option will appear on the contribution page as below.

Help Support CiviCRM!

Do you love CiviCRM? Do you use CiviCRM? Then please support CiviCRM and Contribute NOW by trying out our new online c

Contribution Amount * ☐ \$ 1.00 Friend

☐ \$ 5.00 Supporter

☐ \$ 10.00 Booster

☐ \$ 50.00 Sustainer

☐ Other Amount

Other Amount \$

☐ I want to make a one-time contribution

☒ I pledge to contribute this amount every for installments.

Once you've started collecting pledges, you'll want to check on these through the Pledge home page. This is reached through the Contributions menu: **Contributions -> Pledges -> Dashboard**. and displays a summary of all pledges along with a list of individual pledges.

CiviPledge

Pledge Summary								
	July 2011		August 2011 (current month)		2011 (current year)		Cumulative (since inception)	
Total Pledges	0		0		0		0	
Payments Received	0		0		0		0	
Balance Due	0		0		0		0	
Past Due	0		0		0		0	

Then when you collect the payment for these pledges, you will need to visit the contribution page for the contact and click on the link at the top of the page entitled **Click here to enter a pledge payment**.

27. SET-UP

This chapter shows you how to set up CiviContribute and related components of CiviCRM to support fundraising.

This chapter assumes you have a working understanding of *custom fields*, *contact matching rules*, *CiviCRM Profiles*, and the *CiviMember* and *CiviMail* components. The chapter also assumes you have already set up your *payment processor* and created any custom fields you want to use when tracking contributions. If you have not done these things, please refer to the appropriate sections of this manual for more information.

GENERAL CONFIGURATIONS

You may need to configure the following fields before you begin setting up various methods for managing contributions.

Contribution Types and Accounting Codes

If you need to add contribution types or accounting codes, do this first.

1. Navigate to **Administer > CiviContribute > Contribution Types**, where you can edit one of the existing contribution types or create a new one by clicking **Add Contribution Type**.
2. Once you edit or add a contribution type, you can define an accounting code that corresponds to your accounting system (the accounting code will be exported along with the contribution data if you do an export), and indicate whether this type of contribution is tax-deductible.

Be careful when editing core contribution types or adding new types, because CiviCRM has useful built-in functionality that depends on the core contribution types.

Premiums

Configure premiums, such as T-shirts or subscriptions, that you want to offer on your contribution pages:

1. Navigate to **Administer > CiviContribute > Premiums (Thank-You Gifts)**.
2. You can edit an existing premium or click **Add Premium** to add a new one.
3. Once you edit or add a premium, you can then enter additional information: Name, Description, SKU (an optional product code), Premium Image (an optional image of the item), Minimum Contribution Amount to receive the premium, Market Value of the premium, Actual Cost, and Options (e.g., colors and sizes).
4. If you're offering a subscription or service, you can also click on the **Subscription or Service Settings** and define additional information here, such as Period type (e.g., Fixed or Rolling), the Fixed Period Start Day, the Duration, and the Frequency.

Accepted Credit Cards

Navigate to **Administer > CiviContribute > Accepted Credit Cards** to edit existing acceptable credit cards or define a new option through **Add Accept Creditcard**.

Payment Instruments

Navigate to **Administer > CiviContribute > Payment Instruments** to edit existing options that can be used for contributions or to add a new option through **Add Payment Instruments**. The common options - credit card, cash, check, debit card, and EFT - are installed by default.

CREATING CONTRIBUTION PAGES

To create a new contribution page:

1. Navigate to **Contributions > Manage Contribution Pages** and click on **Add Contribution Page**.
2. Give the page title, select the contribution type (donation, campaign contribution, etc.), goal amount, introductory message and any other relevant information such as dates. You will be able to go back and modify all aspects of this page at any time after completing the setup wizard. Click **Continue**.
3. The **Execute real-time monetary transactions** box is checked by default, to enable monetary donations. You would only uncheck this box if you are using this contribution page to solicit in-kind (non-monetary) donations.
4. Select the **Currency** and **Payment Processor** (which you have previously configured).
5. Check the **Contribution Amounts Section Enabled** box to allow various specific amounts to be presented. Leave this unchecked if, for example, you are using the page for membership sign-ups that have fixed amounts, which will show only the fixed membership amounts and not allow custom amounts to be entered.
6. Check the **Pay Later** box if you want to give users the option to submit payment offline (e.g. mail in a check, call in a credit card, etc.).
7. Select a pre-defined **Price Set**, or enter up to 10 fixed contribution amounts in the table.
8. Check the **Pledges** box to give users the opportunity to pledge future payments.
9. Check **Allow other amounts** to give users the option to pay any amount they choose.
10. Click **Save and Done**.

INCLUDE PROFILES

If you want to collect information from contributors beyond what is required to make a contribution, such as volunteer availability and skills, you can include existing CiviCRM Profiles at the beginning or end of a contribution page. You can also create profile(s) specifically for use in contribution pages.

Profiles used in a contribution page can ONLY contain fields which belong to:

- contact records
- individual records
- contribution records.

If you add fields that are associated with any other record types, you will get an error when you preview your contribution page.

1. Navigate to **Manage Contribution Pages** then for the page you wish to configure, click on **Configure > Include Profiles**.
2. Select a CiviCRM Profile from the dropdown menu to be included at the top of the contribution page (immediately after the introductory message) and/or at the bottom of the page.
3. If you're building a new page, click **<<Previous** to save and return to the previous step, **Continue>>** to proceed or **Cancel** to cancel the configuration wizard. Otherwise simply click **Save**.

THANK-YOU AND RECEIPTING

Once you have created your contribution page, you can customise the Thank-you and Receipt emails that are sent to contributors.

1. Navigate to **Administer > CiviContribute > Manage Contribution Pages**.
2. Use the **Configure** link at the right-hand side of a contribution page in the list to access and edit the page.
3. Click on **Thank-you and Receipting** and enter the information that you wish to appear in the thank-you email. Donors usually expect a receipt as soon as their transaction is complete, so it is recommended to enable the automatic Email Receipt.
4. Click **Save and Done**.

PUBLICIZING YOUR CONTRIBUTION PAGE

Now that you've created your contribution page, it's time to bring people to the page so they can contribute. You will probably want to display a link to the page prominently on your website through a donate button or menu item. Here are some additional tips for promoting a contribution page in different CiviCRM configurations:

Menu item in Joomla!

The most direct way to expose your contribution page or membership signup/renewal page on the front of your web site is by creating a menu item.

1. Navigate to a menu and create a new CiviCRM item.
2. From the list of menu options, choose Contributions.
3. In the basic parameters section, select the contribution page you would like exposed from the dropdown menu.
4. Save the menu item and view the website to confirm the page's functionality.

Menu item in Drupal

From the contribution page listing, select Live Page to view the finished page. You can then copy the URL and include it in a content page or assign it to a menu item.

"Pretty" URLs

CiviContribute contribution pages have "ugly" URLs - in other words, they are difficult to remember. An example is :

`www.myorganization.org/civicrm/contribute/transact?reset=1&id=1`

On the other hand, "pretty" URLs are much easier to remember and use in your organization's outreach, for example:

`www.myorganization.org/donate`

A pretty URL is simply a URL redirect (automatically taking people from one page of your web site to another). Drupal provides a helpful module called Path Redirect (http://drupal.org/project/path_redirect) that lets you can create URL redirects from the user interface without complicated web server configuration. Joomla! users also have a work-around if Search Engine Friendly URLs are enabled in Global Settings. You can then create a menu link to the contribution page and define the "pretty" URL using the alias field.

Personalised Email

Emailing your current membership is the other critical way to publicize the campaign. The CiviMail component of CiviCRM allows you to send targeted emails to any group of contacts in your database. Within a CiviMail message you can include links to the contribution form and use CiviMail's tracking capability to see how many people click on that link.

One time-tested way to increase contributions is to send each targeted constituent a personalized email with a link to the contribution form that has all of their contact information already filled in. This saves them the hassle of filling it out and raises the chances that they donate. Using CiviMail, you can use this feature by creating a special link in the body of your CiviMail message that includes a *checksum token*. A checksum is a unique and pseudo-random number assigned to each recipient of the mailing that points back to their contact information, securely stored in your database.

When people click on the special link, CiviCRM looks them up in the database and pre-fills fields on the contribution form (core fields or fields exposed via a profile) with any information in their contact record. To read more on how to do this and what the link path must be, visit: <http://wiki.civicrm.org/confluence/display/CRMDOC/Mail-merge+Tokens+for+Contact+Data>

AUTOMATIC CONTRIBUTION RECORDING

Regardless of how donors get to your contribution page, CiviCRM automatically records their donations, freeing your staff from doing manual data entry. If the donors already exist in the database, CiviCRM adds the contribution to their existing record. If they don't exist, CiviCRM creates a new record for them.

In situations where people have multiple email addresses, or where more than one person shares an email address, it can be possible for contributions to be credited to the wrong contact. To mitigate the chance of this happening, you can adjust CiviCRM's default duplicate matching rules. For instructions on how to do this, see the chapter Merging and Deduping in the Basic Concepts section of this book.

OFFLINE FUNDRAISING

Your organisation may collect donations at events, solicit donations via postal mailings and other offline methods. Any money raised through offline activities needs to be manually entered into CiviCRM in order to ensure that final reporting is accurate.

There are three steps within CiviCRM for offline fundraising: creating your lists, creating your mailings, and manually entering contributions.

Creating your lists

This process is fairly straightforward if you are familiar with CiviCRM's search capabilities.

1. Go to **Search > Find Contacts** to create a list of records to receive your offline postal mail appeal (it could be your entire database).
2. If you want to track the success of a mailing or who receives certain appeals, save the search results as a group. Use the check box to select all and choose the appropriate option from the "- **actions** -" dropdown menu (e.g. New Smart Group or Add Contacts to Group). Later, you can mark everyone in that group as recipients of that appeal using the **Record Activity for Contacts** option under the "- **actions** -" dropdown menu.
3. , export the list as a CSV file.
4. Select all records or a subset using the checkboxes, and from the "- **actions** -" dropdown menu choose **Export Contacts** and click **Go**.
5. Choose whether to **Export PRIMARY fields** or **Select fields for export**. If you elect to export primary fields, the CSV file will be immediately generated when you click **Continue**. If you opt to select which fields you want to export, click **Continue** and a list of dropdown options will appear.
6. Select the required fields; if you wish to save the list of exported fields as an export mapping for future use, check the **Save this field mapping** box.
7. Click **Export** to generate the CSV file.
8. Click **Done** when you have finished to return to the contact list.

Creating your mailings

Once your spreadsheet is created, you can do a mail merge using any word processing software (such as OpenOffice, the free software word processor) that will insert any fields you want in the letter.

CiviCRM can also create mailing labels for you. Perform the same search you used in the previous section to create your list of recipients, then:

1. From the "- **actions** -" dropdown menu, select **Mailing Labels**.
2. Select the mailing label number, determine whether you want to exclude people with "do not mail" checked in their privacy options (checked by default and recommended), and whether you want to merge two records that have the same mailing address into one label. This last option is very useful when you are mailing a household or organization and you don't want them to receive duplicate mailings. When the records are merged, each name at that address appears on its own line on the label.
3. Click **Make Mailing Labels** and a printable PDF document will be created.

Note that many non-profit organizations in the United States have to sort recipients of a mailing based on zip code for bulk mailing purposes. If this is true for your organization, it is recommended you do *not* create your mailing labels within CiviCRM, but instead create them using word processor merge functions where you have control over the sort order. You can reuse the same spreadsheet for the mail merge you exported in the previous section.

28. EVERYDAY TASKS

This chapter explains how to perform some common CiviContribute tasks.

VIEWING THE CIVICONTRIBUTE DASHBOARD

The CiviContribute main page or dashboard summarises the contributions made, including lists of contributions received in the current month to date, year to date, and cumulatively since the campaign's inception. This allows you to easily browse contributions that have been recorded automatically or added manually. The dashboard also provides buttons to manage and add contribution pages.

Different layouts are available for viewing summaries. The following screenshot shows the most recent contribution to a campaign using the Table Layout tab:

ContactSummaryla

You can also view bar or pie charts to compare contribution totals across months of a given year and across years by clicking on the Chart Layout tab.

ContactSummarylb

ADDING CONTRIBUTIONS MANUALLY

When your organisation receives a contribution from a contact, you can add it to their record. This will be done automatically if the payment is made through CiviCRM (for example, a membership or event fee made with an online registration) but offline payments will need to be manually recorded to ensure that reports generated from CiviCRM are accurate.

If the donor does not already exist in the database, you need to first create a new contact record for them; see the chapter on Contacts in the Basic Concepts section of this book for information on how to do this. Once the record is created, you can then enter the contribution.

To manually enter a contribution for a contact in your database:

1. Find the contact's record using one of the contact search tools, for example **Search > Find Contacts**.
2. Select the contact's **Contributions** tab.
3. Click **Record Contribution (Check, Cash, EFT...)**. Alternatively, if you have set up a payment processor that allows credit card transactions directly on your site, you may select the **Submit Credit Card Contribution** option and process the payment immediately.
4. Complete the new contribution form. The following screenshot shows the offline contribution (i.e. contributions via check, cash, EFT, etc.) form. If you selected to record a credit card contribution, the credit card form is almost identical except for the payment-related fields.

New Contribution

Contributor **Zoe Zanzela**

Contribution Type *

Total Amount * Actual amount given by contributor.

Source

Received (clear)
The date this contribution was received.

Paid By
Leave blank for non-monetary contributions.

Transaction ID

Send Receipt? ☐ Automatically email a receipt for this contribution to zz@example.com?

Receipt Date (clear)
Date that a receipt was sent to the contributor.

Contribution Status

Soft Credit To

► Contribution Source

► Additional Details

► Honoree Information

► Premium Information

Save Save and New Cancel

5. Record the contribution type, amount, received date (the default is the current day), receipt date (shown on the receipt generated by the system), and status (the default is Completed). Any custom fields for contributions will also appear on this form.
6. The **Soft Credit To** field works with personal campaign pages (PCPs) that harness your contacts' help for campaigns. When you enter a donation manually on the contribution form for the contributor, you can assign a soft credit to the owner of the PCP. There is more information about PCPs and campaign fundraising pages in the Set-up chapter of the CiviContribute section.
7. The **Additional Details** section near the bottom of the screen offers other options including adding a note about the contribution and entering the date when a thank-you letter was sent.
8. The last two sections allow you to enter whether the contribution was in honor of someone else (**Honoree Information**) and whether there is a premium associated with the contribution (**Premium Information**).
9. Click **Save**, or **Save and New** if you are entering further contributions.

FINDING CONTRIBUTIONS

TO VIEW THE FIND CONTRIBUTIONS SCREEN, GO TO **CONTRIBUTIONS > FIND CONTRIBUTIONS**.

FindContributions

YOU CAN SEARCH BASED ON A NUMBER OF CRITERIA, SUCH AS DATE RANGE, AMOUNT, CONTRIBUTION STATUS ETC. CONTRIBUTIONS MUST MATCH ALL SPECIFIED CRITERIA IN ORDER TO BE RETURNED, SO THE MORE CRITERIA YOU ENTER, THE NARROWER THE SEARCH WILL BE. FOR EXAMPLE, SEARCHING FOR THE CONTRIBUTION TYPE "DONATION" AND THE DATE RANGE "JANUARY 1ST TO MAY 31ST" WILL RETURN CONTRIBUTIONS THAT MEET BOTH CRITERIA.

THE RESULTS SCREEN FROM A SEARCH DISPLAYS THE THE TOTAL AMOUNT FOR THE RESULTS RETURNED FOR THAT SEARCH, THE NUMBER OF CONTRIBUTIONS, AND THE AVERAGE AMOUNT PER CONTRIBUTION IN ADDITION TO THE SUBSET OF RECORDS RESULTING FROM THE SEARCH:

FindContributions1b

YOU ALSO HAVE OPTIONS UNDER THE - **ACTIONS** - MENU ONCE YOU SELECT ALL OR A SUBSET OF RECORDS. THE "ACTIONS" MENU ALLOWS YOU TO:

- **BATCH UPDATE CONTRIBUTIONS VIA PROFILE:** THIS IS USEFUL IF YOU WANT TO UPDATE A LARGE NUMBER OF CONTRIBUTIONS' THANK-YOU DATE AT ONCE, FOR EXAMPLE. YOU NEED TO CREATE THE PROFILE YOU WANT TO USE *BEFORE* YOU PERFORM THE SEARCH AND BATCH UPDATE (SEE THE THE CHAPTER PROFILES IN THE CONFIGURATION SECTION FOR MORE INFORMATION ABOUT CREATING PROFILES).
- **DELETE CONTRIBUTIONS:** THIS REMOVES CONTRIBUTIONS ENTIRELY FROM THE SYSTEM, AS IF THEY HAD NEVER BEEN ENTERED IN THE FIRST PLACE. EDITING CONTRIBUTIONS AND UPDATING THEIR STATUS TO CANCELED PROVIDES A BETTER AUDIT TRAIL, BUT THERE MAY BE SITUATIONS WHERE YOU DO WANT TO DELETE, SUCH AS A CONTRIBUTION ENTERED ON THE WRONG CONTACT'S RECORD.
- **EXPORT CONTRIBUTIONS:** BECAUSE THIS SEARCH IS CONTRIBUTION-CENTRIC, IT DOES NOT RECOGNISE IF CONTRIBUTIONS COME FROM THE SAME CONTACT. THEREFORE, IF ONE CONTACT HAS MULTIPLE CONTRIBUTIONS THAT FIT THE SEARCH CRITERIA, THAT CONTACT WILL APPEAR AS MULTIPLE ROWS WHEN YOU EXPORT YOUR SPREADSHEET. IF YOU WANT TO DO SEARCHES THAT RETURN ONE RESULT PER CONTACT, USE THE CONTACT ADVANCED SEARCH.
- **PRINT OR EMAIL CONTRIBUTION RECEIPTS:** THIS ALLOWS YOU TO CREATE A PDF FILE OF ALL THE RECEIPTS IN THE SEARCH, OR EMAIL THE RECEIPTS TO THE ASSOCIATED DONORS.
- **SEND EMAIL TO CONTACTS:** SEND AN EMAIL TO ALL OR SELECTED CONTACTS FOUND IN THE SEARCH.
- **UPDATE PENDING CONTRIBUTION STATUS:** UPDATE THE CONTRIBUTION STATUS OF ALL OR SELECTED CONTACTS WHO HAVE CONTRIBUTED ONLINE. THIS ACTION ONLY WORKS WITH ONLINE CONTRIBUTIONS, AND THE SAME CONTRIBUTION STATUS WILL BE APPLIED TO ALL THE CONTRIBUTIONS SELECTED FOR UPDATING. 

FAILED CONTRIBUTIONS

[CONTENT REQUIRED]

DELETING OR CANCELLING CONTRIBUTIONS

[CONTENT REQUIRED]

REPORTS AND ANALYSIS

There are a number of techniques for reporting on and analysing contributions. The contribution dashboard gives a quick overview of your current contributions, with breakdowns for months and years, which you can view as a chart or table.

Home > CiviCRM > CiviReport

Donor Report (Summary)

Report Criteria

Report Settings

Print ReportPDFExport to CSV

Tabular

View

- select group -

Add these Contacts to Group

Grouping(s)Receive Date

Donation StatusIs Completed

Month Beginning	Aggregate Amount	Donations	Average	
July 2009		\$ 700.00	2	\$ 350.00
October 2009		\$ 200.00	1	\$ 200.00
December 2009		\$ 200.00	1	\$ 200.00
	Subtotal	\$ 1,100.00	4	\$ 275.00
March 2010		\$ 110.00	3	\$ 36.67
April 2010		\$ 1,125.00	6	\$ 187.50

That's a good start but there are a couple of ways that you can create more detailed and customised analysis using CiviCRM's search features and CiviReport.

CONTRIBUTION REPORTS

Out of the box, CiviCRM comes with eleven contribution reports designed to help you analyse your contributions.

A **contribution summary report** allows you group contributions by different criteria including including the contact that made the contribution, time period, type, location and view summary statistics for these contributions. The accompanying **contribution detail report** is automatically called when clicking on any rows from the summary report. It can also be called on its own to provide a detailed report for a specific subset of contributions. These two reports can be useful for analyses such as what percentage of our income is coming from different fundraising campaigns, or from events vs. memberships, etc.

The **repeat contribution report** compares the total amount of contributions that contacts have made in two different time periods. As well as the totals, it shows the percentage increase/decrease. This report is useful for tracking contacts who have stepped up their giving, or who giving less than before. **SYBUNT AND LYBUNT** are two strangely named but useful reports that allow you to find donors that gave in 'some years / last year but not this year'.

Two reports, the **contribution by household** and **contribution by organisation** allow you to agregate contributions by household or organisation. This is useful for organisations that make use of these two concepts. For example, you can see all contributions that have been made by employees of one organisation and thank them as a whole, or see the contributions made by a particularly active family. These reports will also include any donations that are attached to the organisation or household record, for example a donation made by the organisation after an collective office fundraising event.

The **top donors report** provides a list of the top donors during a time period you define. You can include as many donors as you want (for example, top 100 of your donors).

The **personal campaign pages** report is useful to get an overview of the status of all personal campaign pages. You can filter by contribution page to see personal campaign pages for a single campaign and other appropriate criteria.

The soft credit report is useful for looking at all your **soft credits** and seeing who are at least partially responsible for other people's donations.

PLEDGE REPORTS

CiviCRM comes with two pledge reports that are useful when analysing pledges. The **Pledge report** and **Pledge summary report** work in much the same way as the contribution detail and summary reports. An additional **Pledged but not paid** report pledges which are not completed and have a due date in the past.

SEARCHING BASED ON CONTRIBUTION DATA

CiviCRM makes an important distinction between contributions and the people that made the contributions. It is important to appreciate the difference between the two when you are searching contributions. For example, if you want to send a gift to all people that made a contribution in the last year, what would be more appropriate? Contacts or contributions? The answer depends on whether you want to send two gifts to people that made two contributions and there is of course no right or wrong answer - it just depends on your approach. It is important to think about this each time to do a search.

The **Find contributions** search allows you to search based on contribution data and return contribution records. The **Advanced search** allows you to search based on some limited contribution data (and combine that with other contact information) and return contacts. You can also choose **contribution** from the **Display Results As** column to show contributions rather than contacts.

Searching based on criteria gives you access to simple totals and also the option to export as CSV for further analysis.

MORE ANALYSIS

If you can't do what you want with a built in report or search, consider commissioning a new report or custom search. Read the CiviReport section for more information.

EVENTS

30. WHAT IS CIVIEVENT?

31. WHAT YOU NEED TO KNOW

32. SET-UP

33. CIVIEVENT EVERYDAY TASKS

34. REPORTS AND ANALYSIS

30. WHAT IS CIVIEVENT?

CiviEvent provides a set of tools for running events and minimizes the usual amount of administration required. In CiviCRM, an event is something that happens at a specified time, with a registration process, and has participants.

CiviEvent helps you to organise and hold events by:

- facilitating self-registration for participants, including online credit card payments
- allowing you to track event sign-ups, cancellations, and attendance
- making it easy for you to promote your event online
- making your data accessible while on-site at the event
- streamlining event set-up for similar, recurring events with event templates

CiviEvent is integrated with CiviCRM's other components. For example, CiviMail makes it possible to promote the event to a targeted list and to communicate with event participants via email before and after the event (see the Set-up chapter in the CiviMail section for more information); and in order to accept online event fees, you must also set up a payment processor and CiviContribute.

SCENARIO: YOUTH LEADERSHIP WORKSHOP

A community arts group, Arts in Action, conducts leadership workshops for youth aged under 25 throughout the year. Their goals include attracting new youth to attend and enlisting past attendees to volunteer and teach. Youth from local schools and theater groups are invited to attend, and there are youth speakers and volunteers, as well as other speakers for the training workshops.

The Arts in Action communications staff use CiviEvent to efficiently manage each event from the beginning of its planning to the end of its evaluation. First, an event page with an online registration form is created. Because this is a regular event, a staff member previously created an event template which pre-populates much of the form for each following event. There is a flat fee for registration, with additional fees for optional workshops which attendees can select and pay for online. The registration form uses a profile to gather information about participants' food and lodging preferences.

A targeted list of youth and groups is drawn from existing contacts, and staff send personalised invitations using CiviMail (also based on a template, so that information can be reused from one event to the next). The invitation includes a direct link to the event page so that with a single click arrive at the online registration. The event is also announced publicly by posting it on the website, and the "Tell-a-friend" function is enabled so that the information can easily be spread through people's networks.

A staff person is designated to manage the process by which participants register themselves, periodically checking to make sure that payments are being made, managing the wait list when participant sign-ups exceed the maximum number, and answering any queries.

On the day of the event, organisers check in each attendee on-site to keep track of who has actually attending and whether there are any no-shows. The database can be updated immediately, freeing up spaces for those on the wait list and later helping to determine who has paid, who still owes fees and what the final financial picture is.

After each workshop, Arts in Action staff evaluate the success of the event and use CiviEvent to quickly generate reports such as the number of attendees, total event fees paid, and total amount still due. The event and mail templates are updated if necessary and saved for the next event.

31. WHAT YOU NEED TO KNOW

Before you use CiviEvent to support your event management, we recommend you read this chapter to understand the concepts and address key questions.

Take time to assess the kind of information you need to run your events effectively, as well as what information would be useful to collect during events and from event participants. Many organisations run recurring events that are very similar, in which case templates can make event set-up processes easier.

Below are the key concepts that you need to understand, followed by a list of concrete questions that will help you to use CiviEvent effectively. You'll also find mentions of other CiviCRM components that are needed to use CiviEvent. At the end of this chapter, Other Considerations gives suggestions for promoting, managing, and following up after your event.

KEY CONCEPTS

Review the following concepts before you begin to set up your event. You will put these concepts into practical use when following the step-by-step tasks in the next chapters of this section.

Event Type

CiviCRM allows you to define different types of events, such as conference, meeting or fundraiser. Event types are useful when searching through event participants or generating an event listing feed. For example, Arts in Action may find it useful to search for everyone who has attended a youth leadership workshop, or generate a list of meetings for volunteers.

You can create custom fields to store and display additional data about an event by its event type. See the chapter Creating Custom Fields in the section Your Data and CiviCRM for more information about this.

Participant Roles and Statuses

Every individual is assigned a participant role, such as attendee, volunteer or speaker, at the time of registration. This field allows you to segment participants into meaningful categories based on their involvement in the event. You can also collect certain information, for example relevant only to volunteers.

Participant status tracks individuals' registration before, during and after the event. This allows you to identify pending or canceled registrations, people on a waiting list, no-shows, confirmed attendance or any other status that you choose to define.

Custom data and Profiles

CiviCRM provides ample flexibility for you to collect exactly the information you want from participants during the event management process. This is done using custom fields.

Participants must provide at least an email address when registering online, but many organisations find it useful to collect additional information at the same time. This might include first and last name, as well as event-specific information such as meal preference. For example, Arts in Action asks participants to select which workshops they want to register for.

You must create a profile to collect this additional information. Creating a profile groups these fields together and associates them with the event to collect this information. You may also define your own custom fields and associate them with certain event types or participant roles. You'll be able to view participant custom data fields automatically when you access the information through CiviEvent. You can also let participants fill them out in the online event registration via profiles. See the chapter Creating Custom Fields in the section Your Data and CiviCRM for more information about this.

Payments

Event fees provide a set of options from which the registrant must select a single option. This approach works well for many events and is easy to set up. Price sets allow you to break event fees into smaller pieces, and set a fee for each piece. Using a price set you can offer optional programmes and features (e.g. an optional post-conference dinner or a book) at extra cost. CiviEvent also lets you offer discounts for paid events either with a discount code or by early sign-up date. Examples and steps are described in the Set-up chapter of this section.

Fees coming in via events are tracked as contributions using CiviContribute. You will need to decide what type of contributions your event fees are.

If you plan to accept credit card payments through the online registration form, you need to configure a payment processor prior to creating your event.

KEY QUESTIONS

Thinking about the structure of your event and how you want a person to experience the event registration will help to inform the level of additional configuration you need and how to set up the event. Here are some important questions to consider with regard to the key concepts of CiviEvent discussed above.

- What type of event is this, and what different types of events does your organisation hold?
- What different roles will participants have at the event?
- What specific information you want to collect about participants, e.g., food and lodging preferences?
- What kind of information will you need to gather from event participants?
- Will this be a paid event?
- If it's a paid event, what type of contribution do you consider this event fee?
- What kind of fee structure will you need to hold your event?
- Will you charge multiple fees, such as fees for additional sessions or meals?
- Will you offer discounts or early registration?
- Will you allow online registrations to the event?
- Is there a limit on the number of participants that can attend?
- Do you want to approve registration, or leave it open to anyone?
- Will there be a waitlist if the maximum number of registrations is exceeded?
- Should one person be able to register multiple people?
- Do you want to give registrants confirmation of registering?
- Do you want to make the listing of the participants public?
- Is this an event that repeats regularly with roughly the same details?

OTHER CONSIDERATIONS

You may wish to consider some of the following depending on your needs.

Promoting the Event

Think about the best ways target participants could get information about your event and which tools can help you promote it:

- What strategy will you use to promote your event, and through what channels?
- Will you be posting your event on your website and allow people to register online?
- Is email a good way to reach your constituents to market the event?
- Is your event "by invitation only"? Who are you are inviting?
- Have you planned a schedule to announce your event from the initial invitation to sending out event reminders?

Managing the Event

The event management tasks vary depending on the type of event you're planning and the venue, and CiviCRM supports these tasks through many event and communication tools, along with its searching and reporting features.

Consider how staff and those managing the event will keep track of participant registration and participants' needs. Read about how to do this using the event dashboard in Everyday Tasks.

Following up after the Event

Updating the status of each participant during the event or soon after will help to ensure that you have the most accurate information to evaluate your event.

It is good practice to send an email after the event to all the participants to thank them and provide links to any documentation you have online. You might want to use this opportunity to promote a new event, suggest that attendees join your organisation as a member, or solicit donations for a specific campaign.

32. SET-UP

This chapter assumes that you've gone through the event planning chapter and sketched out the type of events you need to configure, along with the event-related data you want to collect and track. Now it's time to set up CiviEvent and start creating events.

If you do not see the **Events** menu item in your navigation menu bar and you don't see CiviEvent under the Administer menu, you may not have the component enabled. Navigate to **Administer > Configure > Global Settings > Enable Components** to enable CiviEvent.

GENERAL CIVIEVENT CONFIGURATION

A number of general settings lay the foundations for your events such as Event Type, Participant Role, and Participant Status. These have been described in the Planning chapter, and you should modify them as appropriate before you begin creating events.

Event Types

Here is where you define the types of events your organisation holds. You can return at any time to add to the list of types or modify an event type label. However, you can not delete event types which have been assigned to one or more events.

- Navigate to **Administer > CiviEvent > Event Types** to review the default list of event types, shown in the following screenshot.
- Modify event type labels by clicking **Edit** on any row.
- Click **Add Event Type** to create a new category for your events.

Event Type Options

Use Event Types to categorize your events. Event feeds can be filtered by Event Type and participant searches can use Event Type as a criteria.

Label	Value	Description	Order	Reserved	Enabled?	
Conference	1		↓ ↑	No	Yes	Edit Disable Delete
Exhibition	2		↕ ↑ ↓	No	Yes	Edit Disable Delete
Fundraiser	3		↕ ↑ ↓	No	Yes	Edit Disable Delete
Meeting	4		↕ ↑ ↓	No	Yes	Edit Disable Delete
Performance	5		↕ ↑ ↓	No	Yes	Edit Disable Delete
Workshop	6		↕ ↑	No	Yes	Edit Disable Delete

Add Event Type

Participant Roles

- Navigate to **Administer > CiviEvent > Participant Roles** to review the default list, shown in the following screenshot.
- Modify participant role labels by clicking **Edit** on any row.
- Click **Add Participant Role** if you need additional roles that are not in the default list (e.g. audio-visual coordinator, catering manager, etc.).

Participant Role Options

Define participant roles for events here (e.g. Attendee, Host, Speaker...). You can then assign roles and search for participants by role.

Label	Value	Counted?	Description	Order	Reserved	Enabled?	
Attendee	1	✓		↓ ↑	No	Yes	Edit Disable Delete
Volunteer	2	✓		↕ ↑ ↓	No	Yes	Edit Disable Delete
Host	3	✓		↕ ↑ ↓	No	Yes	Edit Disable Delete
Speaker	4	✓		↕ ↑	No	Yes	Edit Disable Delete

Add Participant Role

Participant Statuses

Navigate to

Administer > CiviEvent > Participant Statuses to review the default list, shown in the following screenshot. Some statuses in the list are marked *Reserved* (with a green checkmark). This means that they are required for event workflows and can not be deleted or disabled. However you can change the label, which is what users see when they select from a list of statuses.

Participant Status								
Manage event participant statuses below. Enable selected statuses to allow event waitlisting and/or participant approval. ⓘ								
Label	Name	Class	Reserved?	Active?	Counted?	Weight	Visibility	
Registered	Registered	Positive	✓	Yes	✓	1	Public	Edit
Attended	Attended	Positive		Yes	✓	2	Admin	Edit Delete Disable
No-show	No-show	Negative		Yes		3	Admin	Edit Delete Disable
Cancelled	Cancelled	Negative	✓	Yes		4	Admin	Edit
Pending from pay later	Pending from pay later	Pending	✓	Yes	✓	5	Admin	Edit
Pending from incomplete transaction	Pending from incomplete transaction	Pending	✓	Yes		6	Admin	Edit
On waitlist	On waitlist	Waiting	✓	No		7	Admin	Edit Enable
Awaiting approval	Awaiting approval	Waiting	✓	No	✓	8	Admin	Edit Enable
Pending from waitlist	Pending from waitlist	Pending	✓	No	✓	9	Admin	Edit Enable
Pending from approval	Pending from approval	Pending	✓	No	✓	10	Admin	Edit Enable
Rejected	Rejected	Negative	✓	No		11	Admin	Edit Enable
Expired	Expired	Negative	✓	Yes		12	Admin	Edit

[Add Participant Status](#)

There are five statuses that are disabled by default (displayed in red). These statuses are used for optional event registration features, including paid online event registration and the participant waitlist. These statuses must be enabled if you want to use those features.

You can rename statuses to friendly names such as "Yes, I'm coming", "No, I can't make it", and "Maybe" by editing participant statuses as shown above. Then for each of those statuses, determine which ones are for administrative use only or for public use and select Admin or Public accordingly. This allows you to expose the participant status field via a profile on your registration form, displaying only those with public visibility. For example, you may want to display "Yes, I'm coming" but not "Pending from pay later".

If you want to use the Waitlist feature for any of your events, you must enable the "On waitlist" and "Pending from waitlist" statuses here.

Enable "Awaiting approval", "Pending" and "Rejected" statuses here if you want to use this feature for any of your events.

Custom Data

To collect custom data from participants, add new custom fields through **Administer > Customize > Custom Data**. Give a name to the set of custom fields, such as Participant Info, by clicking **Add a set of custom fields**.

You must then choose what the set of custom fields is to be used for. For example, a set of fields might be used for events, participants, participants at certain events, or participants who take on certain roles (such as speakers). Here's additional explanation of what custom fields might be used for in CiviEvent:

- **Events (Event Type):** This type applies to fields that are connected to the event itself, or to a specific event type. For example, Arts in Action from the scenario in What is CiviEvent? hosts a series of training workshops throughout the year and wants to create a custom field to track six common topics covered in workshops. You could create a checkbox style field with the list of topic options, such as XXXX. When creating an event of type Workshop, this field will be available. Note that you are not required to select a specific event type. Leaving the dropdown set to Any indicates the field is available to all events, regardless of the type.
- **Participants:** The Participant use type attaches to the actual registrant record. For example, you may want to know whether a registrant has any dietary restrictions and collect that information when they register.
- **Participants (Event Name):** This use type is identical to the Participants type, with the exception that it allows you to assign a group of custom fields to a specific event. Returning to the previous example, you may find that the dietary restrictions field is relevant only to an upcoming full-day workshop where lunch will be served, but not to an afternoon workshop series you are planning for the coming month. You could create the field set and assign it to a single event.
- **Participants (Role):** Additionally, you may create a participants type field and assign it to a single participant role. This is valuable, for example, if you need to collect biographical profile details from your speakers and wish to record it with their event registration. Because that field is applicable to only the Speakers role, you would limit it using this interface.

After creating your set of custom fields, add the actual fields within each set, such as Lodging Preferences (Single or Shared Room) or Dietary Needs (Vegetarian, Vegan, Allergies). Refer to Custom Data in Understanding Your Data before creating your actual fields.

Using Profiles for online event registration

Navigate to **Administer > Customize > Profile** to set up and edit profiles. The following screenshot offers a typical example of a Profile used for a conference where there is an option to provide childcare. Notice that this profile contains fields belonging to Individuals and Participants.

Participant Information - CiviCRM Profile Fields

Field Name	Visibility	Searchable?	In Selector?	Order	Active	Required	View Only
First Name (Individual)	User and User Admin Only	No	No	↓ ↑	Yes	Yes	No
Last Name (Individual)	User and User Admin Only	No	No	↑ ↓	Yes	No	No
Childcare Needed (Participant)	User and User Admin Only	No	No	↑	Yes	No	No

Add CiviCRM Profile Field

Edit Profile Settings

Preview this profile (all fields)

If you

are not familiar with setting up Profiles, refer to the Profiles chapter the section on Understanding Your Data.

Paid Events

You will assign a contribution type to funds that comes in through events. This makes it possible to track fees that come in via events separately from funds that come in otherwise, or even distinguish between fees that come in for different event types.

Registration confirmation and receipting

You can send automated confirmation and receipt emails to participants who register online, as well as participants who are registered by your staff or volunteers. The content and layout of these emails are controlled by message templates. Both HTML and Text formats are provided. You can modify or add text to these emails, or add branding such as a logo to the HTML versions. To set up a from email address from which to send the confirmation and receipts, see Set-Up in the Email section.

Navigate to **Administer > Configure > Message Templates** (shown in the following screenshot) and click the **System Workflow Message** tab to see the list of messages you can modify. Click **Edit** next to "Events - Registration Confirmation and Receipt" rows to edit the content and layout.

Message Templates

User-driven Messages

System Workflow Messages

System workflow message templates are used to generate the emails sent to constituents and administrators for contribution receipts, event confirmations and many other workflows. You can customize the style and wording of these messages here.

Workflow

Cases - Send Copy of an Activity	Edit
Contributions - Duplicate Organization Alert	Edit
Contributions - Receipt (off-line)	Edit
Contributions - Receipt (on-line)	Edit
Contributions - Recurring Start and End Notification	Edit
Events - Pending Registration Expiration Notice	Edit
Events - Registration Cancellation Notice	Edit
Events - Registration Confirmation and Receipt (off-line)	Edit Revert to Default View Default
Events - Registration Confirmation and Receipt (on-line)	Edit Revert to Default View Default

The templates for these messages include both the text shown and necessary program logic. Use caution when editing so as not to modify the program logic. Be sure to test the workflow and review the emails sent after making any changes. If you find that your changes have caused problems, errors or missing information, you can always revert to the system default for that workflow.

CREATING AN EVENT

You're ready now to create an event. The rest of this chapter guides you through the sequence of screens which allow you to control each aspect of the event. As we walk through each step, the options and their effects on the resulting registration form are illustrated by screenshots and examples.

It's a good idea to go through each screen in detail as you learn about available options. Later in this chapter we'll explain how you can streamline the event creation process by creating event templates. These allow you to pre-fill most options.

Begin by navigating to **Events > New Event**.

Event Information and Settings

The first page in the event wizard requests basic information about the event:

- What type of event is it (e.g. conference, workshop, etc.)?
- What role will participants be assigned when they register online for this event? Roles distinguish different types of event participants, such as attendees, speakers and staff. The value placed in this field will be assigned by default when users register online. The most common value is Attendee.
- Do you want users to see a list of participants, and how much information about the participants do you want to reveal? Participant listings demonstrate support for an event and can help to generate interest within your constituent community. Note that the options you define in this section only *enable* participant listings — to display it, you will need to create a menu item or link to the listing somewhere on your web site. Once you've created the event, the participant listings link is displayed on the event configuration page. Refer to the chapter on Everyday Tasks for information on participant listings and other ways to promote your events.

- What is your event called? The title will appear on event information pages, registration pages, event listings, and in the Manage Events administrative page. Be sure to choose a meaningful, well-crafted title to represent your event.

- The next two fields (event summary and complete description) let you describe your event. Both the summary and complete description will be included on event information pages. Use the rich-text editor provided for the description field to include photo, images, and formatted text.
- Enter the start date/time and end date/time for your event. These will be included on the event information page and event listings.
- Set a maximum number of participants for each event and define a message to be displayed when that number is reached. This is important, because online registration otherwise lets people sign up without giving your staff a chance to intervene and shut off registrations.
- If you'd like to enable the Waitlist feature, you must first enable the related participant statuses. You can then check "Offer Waitlist" and set the message you want displayed on the event information page when the event is full.
- GPS and web-based mapping tools: CiviCRM integrates this functionality by letting you include Google Maps or Yahoo! maps throughout your site. You will first need to configure your mapping solution through **Administer > Configure > Global Settings > Mapping**, then enable a map link which will generate the location based on the event location.
- Select the "Public Event" box to include the event in promotional listings such as RSS feeds, iCal files or feeds, and event listing pages. (Other techniques for promoting events are described in the Everyday Tasks chapter of this section).
- Lastly, you have the option of making this event active or inactive. If you anticipate that it will take some time to complete the configuration of your event, consider making it inactive it until it is complete to ensure it is not inadvertently listed on the event listing feeds. You can easily activate the event when you are ready to begin publicizing it.

After reviewing the details on this page, click **Save** to advance to the next step. When you press Save, your event is created. You can interrupt configuration on any subsequent page by clicking Cancel and return later to review and modify any of the settings. Any information you entered on any page will be preserved so long as you press Save on that page.

To return to a saved event, navigate to **Events > Manage Events** and click **Configure** to continue working on the event.

Event Location

The next step is to complete the location and contact details for the event. Though optional, it is highly recommended that you take the time to provide these details to your potential participants. If you have enabled a map link in the previous step, make sure that you fully complete the address details on this page (see screenshot).

Once you have entered an event location, you can reuse it for subsequent events by clicking **Use existing location** and selecting from the dropdown list.

The screenshot shows the 'Configure Event - Fall Fundraiser Dinner' interface. At the top, there are tabs: 'Info and Settings', 'Event Location' (selected), 'Fees (disabled)', 'Online Registration (disabled)', and 'Tell a Friend (disabled)'. Below the tabs is a green-bordered box with instructions: 'Use this form to configure the location and optional contact information for the event. This information will be displayed on the Event Information page. It will also be included in online registration pages and confirmation emails if these features are enabled.' Below this are three buttons: 'Save', 'Save and Done', and 'Cancel'. The 'Choose Location' section has two radio buttons: 'Create new location' (unselected) and 'Use existing location' (selected). Below this is a dropdown menu for 'Use Location' showing '14S El Camino Way E :: Collinsville :: Connec'. The 'Address' section has a 'Street Address' label and a text input field containing '14S El Camino Way E'. Below the input field is a small note: 'Street number, street name, apartment/unit/suite - OR P.O. box'.

You can also list phone numbers and email addresses on the event information page if you want to give registrants a way to contact event organizers directly. If the event is being held off-site from your organization's primary location, you may also want to provide contact information for the meeting location.

Click **Save** to save your entries and advance to the next step.

Event Fees

If the event is free, set the **Paid Event** radio button to **No**, then click **Save** and skip to Online Registration.

If this is a paid event, click **Yes**. The screen will show the options available (see the following set of screenshots).

Questions you are asked on this screen are:

- What contribution type will be assigned to paid registrations for this event? Although the most common value for this field is simply Event Fee, CiviCRM provides the flexibility to define multiple contribution types and assign them to different events as needed. See Set-Up in the Contributions section for details.
- Do you want to allow registrants to pay later by mailing in a check, paying on-site with cash or credit card, or arranging some other payment method? If so, you can enable the Pay Later option and define a label and payment instructions. If you keep this unchecked, registrants will be required to pay by credit card.

Configure Event - Fall Fundraiser Dinner

Info and SettingsEvent LocationFees (disabled)Online Registration (disabled)Tell a Friend (disabled)

SaveSave and DoneCancel

Paid Event

☒ Yes ☐ No

Payment Processor

My Payment Processor

If this is a paid event and you want users to be able to register and pay online, select a payment processor to use. NOTE: Alternatively, you can enable the **Pay Later** feature below without setting up a payment processor. All users will then be asked to submit payment offline (e.g. mail in a check, call in a credit card, etc.). ([learn more...](#))

Contribution Type *

Event Fee

This contribution type will be assigned to payments made by participants when they register online.

Fee Label *

Event Fee

This label is displayed with the list of event fees.

☒ Enable Pay Later option?
Check this box if you want to give users the option to submit payment offline (e.g. mail in a check, call in a credit card, etc.).

Pay Later Label *

I will send payment by check

Text displayed next to the checkbox for the 'pay later' option on the contribution form.

Pay Later Instructions *

Send a check made out to "Central City Food Bank" and mail it to 12 Main St., San Jose CA 92011 within 3 business days.

- Can you use **Regular Fees** for this event, or do you need to use a **Price Set**? Regular fees are easy to set up: each fee amount has a label assigned and you can set a default fee. Here's a simple example:

Regular Fees

Use the table below to enter descriptive labels and amounts for up to ten event fee levels. These will be presented as a list of radio button options. Both the label and dollar amount will be displayed. You can also configure one or more sets of discounted fees by checking "Discounts by Signup Date" below.

Fee Label	Amount	Default?
Members	295.00	☒
Non-members (regular)	395.00	☐
Non-members (student)	195.00	☐

- **Price sets** - examples and steps for creating price sets are covered later in this section.
- You can also configure early bird discounts (discounts determined by sign-up date). These override regular event fees. This discounting method is available only for the regular fee structure. Implementing other discounting rules or discounts for price sets requires additional programming. You or your developer should refer to the section on extending CiviCRM for more information.

Discount Set	Start Date	End Date
Early Registration Discount	May 06 2009	May 31 2009
☐ another discount set Add Discount Set to Fee Table		
Discounted Fees		
Use the table below to enter descriptive labels and amounts for up to ten discounted event fees for each discount set. Don't forget to click 'Save' when you are finished.		
Fee Label	Early Registration Discount	Default?
Early Registration Discount before June 1, 2009	\$ 100	☐
Standard Fee	\$ 165	☒
Performer Rate	\$ 150	☐

- Discounts are structured in parallel with the base event fees. After creating your list of fee options and enabling the discounts feature, you must create the discount set and add it to the fee table. To help you create a discount set, a new fee table will appear toward the bottom of your page, duplicating the original fee table shown in the previous screenshot. You can now edit the labels and fees to correspond to the discounts offered for each of the original fee options.
- You can create multiple date-based discount sets for an event. This may be useful if you have a series of early bird dates that progressively increase the cost of registration as the date of the event gets closer.

Click **Save** and advance to the next step.

Online Registration

Your organisation may want its staff to register participants manually. However, allowing people to register online (self-service) through your web site offers many benefits. Online registration is convenient for your constituents and can save staff time and resources.

To offer online registration, check **Allow Online Registration** and use the options on this form to configure this feature.

- Define the text to be used as the link to the registration form, and set the starting and ending dates for registration. The link text is used in the event information page, and is most commonly "Register Now" or similar. The start and end dates define when web site visitors may register for the event. The registration end date may be different from the start date of the event, as you may want to close registration in advance of the event in order to prepare name tags or perform other administrative functions.

Allow Online Registration? ☒ Enable or disable online registration for this event.

Registration Link Text

Registration Start Date Time (clear)

Registration End Date Time (clear)

- Enabling "Register multiple participants" lets individuals register as many people as they choose for the event and pay the fees with a single transaction. For example, an organisation may be sending multiple people to a conference, or an individual may bring their partner and wish to register and pay for both in a single process. By default, this option requires a different name and email address for each person registered.
- Checking "Allow multiple registrations from the same email address" provides the same capabilities, but without requiring distinct email addresses for each registrant. In either case, CiviCRM uses a separate contact record (either an existing one if it's already in the system, or create a new one) for each individual registered.
- The Registration Screen configuration defines introductory and footer text for your registration page, and the profiles included in the top and bottom regions of the form. If you come to this stage in the wizard and have not created your profile form, you may continue with the event set-up process and return to the event configuration page later to select your desired profiles.
- What other data do you want to capture from your participants as they register? By default, the CiviEvent registration page requires only an email address. Organizations typically want to collect additional contact information from the registrant, as well as define fields unique to this particular event (such as meal choice). The custom data fields and profiles used here (see screenshot) must be created before you reach this form, as described earlier in this chapter. Here, you can include up to two profile form snippets in your registration page. It's a good idea to put contact data (name, address, etc.) in one profile snippet, and event related information (e.g. meal choice, childcare requirements, etc.) in the second profile.
- You can collect different information from additional participants by selecting different profiles, or the same by selecting "same as for main contact".

Include Profile

Name and Address

(top of page)

Include additional fields on this registration form by configuring and selecting a CiviCRM Profile to be included at the top of the page (immediately after the introductory message).

Include Profile

- select -

(bottom of page)

Include additional fields on this registration form by configuring and selecting a CiviCRM Profile to be included at the bottom of the page.

Profile for Additional Participants (top of page)

- same as for main contact -

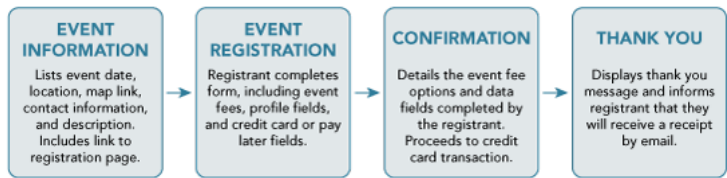
Change this if you want to use a different profile for additional participants.

Profile for Additional Participants (bottom of page)

- same as for main contact -

Change this if you want to use a different profile for additional participants.

The remaining fields on this page allow you to define the text displayed on the Confirmation page, Thank-you page, and emailed confirmations/receipts (if enabled). The standard page flow is shown in the following screenshot:



For free events, the Confirmation step is skipped. When completing the Confirmation, Thank-you, and Confirmation Email sections on this page, take care to think about the user experience at each stage in the process. Ensure that the text is appropriate to the point where the registrant will be in the registration process.

For most events you'll want to enable the Send Confirmation Email feature (see following screenshot). For paid events, the confirmation email also acts as a receipt. Make sure that the Confirm From Email address entered is a valid email account on your mail server. Add one or more staff emails (separating multiple email addresses with commas) to the CC Confirmation To field if you want real-time updates on who is registering for your event.

▼ **Confirmation Email**

Send Confirmation ☒ Yes ☐ No

Email? Do you want a registration confirmation email sent automatically to the user? This email includes event date(s), location and contact information. For paid events, this email is also a receipt for their payment.

Text

Additional message or instructions to include in confirmation email.

Confirm From Name * FROM name for email.

Confirm From Email * FROM email address (this must be a valid email account with your SMTP email service provider).

CC Confirmation

To You can notify event organizers of each online registration by specifying one or more email addresses to receive a carbon copy (cc). Multiple email addresses should be separated by a comma (e.g. jane@example.org, paula@example.org).

Click **Save** to save your entries and continue with the next step.

Tell-A-Friend

CiviEvent makes it easy to leverage the social networking power of your committed constituents by empowering them to quickly and easily share details about your organization and event with their friends and colleagues. The final step in the event creation is a page where you can enable "Tell-A-Friend" capabilities. You can define the text and links to be included on that page and in the email sent from the tool (see the following screenshot).

☒ Tell a Friend enabled?

Title *

Introduction
This message is displayed to the participant at the top of the Tell a Friend form. You may include HTML tags to add formatting or links.

Suggested Message
Provides the participant with suggested text for their personalized message to their friends.

Info Page Link
A link to this Event Information page is automatically included in the email sent to friends. If you ALSO want to include a link providing general information about your organization, enter that link here (e.g. <http://www.example.org/>)

Thank-you Title *

Thank-you Message
Your message thanking the participant for helping to spread the word. You may include HTML tags to add formatting or links.

A "Tell a friend" activity record will be added to a participant's Activities tab each time she sends mail to her friends. This allows you to track your most active supporters and engage them further. The people who are emailed using this feature are also automatically added to CiviCRM as contacts.

This is the last step in creating an event. Click **Save and Done**.

TESTING YOUR EVENT

Before revealing your event to the public, you should always test the event registration process. This can be done as follows:

1. Navigate to Events > Manage Events.
2. From Event Links, select **Test-drive** to test the registration page. Test-drive mode will use the sandbox options for your payment processor, if available, and will create a registrant record with a test indication so that it can be reviewed and easily removed.
3. Fill out the registration form and complete the registration process.
4. In order to find the new test participant record, navigate to Events > Find Participants.
5. In the search criteria, check the box Find Test Participants.
6. If you need to adjust the event settings, navigate to Events > Manage Events and click the Configure link for this event.
7. If you discover elements that you need to edit and adjust, select **Configure** to return to the list of event setting pages.
8. If you have events where anonymous users register for events, you should also test the registration when not logged in. Refer to the Event Permissions information later in this chapter for details.

Once you are satisfied with the event information and registration form, it's time to display it on your website. The Everyday Tasks chapter includes detailed information on adding the event to your web site and promoting it.

Using event templates to streamline event creation

If you need to set up a number of events with similar configurations, you can streamline the process using event templates.

The steps for creating event templates are similar to those described earlier for creating an event. The main differences are:

- Assign a descriptive template title that clearly identifies the type of event this template is used for (e.g., Monthly community meetup with online registration).
- There are no starting and ending dates in the template form. That information will always be specific to an actual event instance.

Click **Events > Event Templates**.

- To create a template, start by navigating to **Events > Event Templates** and clicking **Add Event Template**. Enter template title and event type.
- Select campaign if all events created from this template should be associated with a campaign.
- Continue the normal event set-up process using the settings that will be constant for all events to be created using this template.
- Common characteristics might include location, event fees, online registration settings, tell-a-friend settings, etc.

New Event Template

Continue >> Cancel

From Template: - select -

Template Title: Monthly community meetup with online registration

Event Type: Meeting
After selecting an Event Type, this page will display any custom event fields for that type.

Campaign: - select -

Participant Role: Attendee
The Role you select here is automatically assigned to people when they register online for this event (usually the default 'Attendee' role).

Participant Listing: Disabled
To allow users to see a listing of participants, set this field to 'Name' (list names only), 'Name and Email', or 'Name, Status and Register Date'.

Event Title: Insert Month Community Meetup
Please use only alphanumeric, spaces, hyphens and dashes for event names.

Event Summary: [Text Area]

Complete Description: [Rich Text Editor]

Max Number of Participants: [Text Field]

☒ Include Map to Event Location?
☒ Public Event?
☐ Include this event in iCalendar feeds?
☒ Is this Event Active?

Continue >> Cancel

Once you've created an event template, you can select that template (as shown in the following screenshot) when you start to create a new event. Your event will be pre-filled with the saved configuration properties.

New Event

Continue >> Cancel

From Template: Monthly community meetup with online registration

Event Type: Meeting
After selecting an Event Type, this page will display any custom event fields for that type.

Campaign: - select -

Participant Role: Attendee
The Role you select here is automatically assigned to people when they register online for this event (usually the default 'Attendee' role).

Participant Listing: Disabled
To allow users to see a listing of participants, set this field to 'Name' (list names only), 'Name and Email', or 'Name, Status and Register Date'.

Event Title: April Community Meetup
Please use only alphanumeric, spaces, hyphens and dashes for event names.

Event Summary: [Text Area]

Setting permissions for event registration

This section applies to Drupal installations only.

If you've enabled online registration for events on your site you need to review the Drupal user permissions to ensure that visitors are able to view event information and complete the registration forms. Navigate to **Administer > Users > Permissions**.

Most organizations allow anonymous users (users who have not logged in) to view and register for events. If you want to allow this, you must assign the following CiviCRM module permissions for the anonymous user role:

- access all custom data - required if you are collecting information in custom fields from registrants
- profile create - required if you've included any profiles in your online registration forms
- register for events
- view event info
- view event participants - required if you want to display a listing of registered participants.

If you want to exclude anonymous visitors from viewing or registering online for events, assign these permissions to an authenticated user role.

CiviCRM has an additional permissioning system known as Access Control Lists (ACLs). ACLs allow you control access to CiviCRM data. Note that a CiviCRM ACL Role is not related to the Drupal Role. Refer to the Access Control List chapter for more information.

If you need to limit access control for specific events, you can use the Manage Access Control feature to assign access to specific groups of contacts.

INCLUDING PROFILES FOR AN EVENT REGISTRATION

The best way to collect additional information (such as food or lodging preferences) during online registration is to include profiles in your event configuration.

Do this as follows:

1. Navigate to **Events > Manage Events**.
2. Click **Configure** for the appropriate event.
3. Click the **Online Registration** tab or link.
4. Select from the dropdown menus one profile for "top of page" and another profile for "bottom of page".

If the profiles you require do not already exist, you will need to create them. See the chapter on Profiles in the section Understanding Your Data for information about how to do this.

COMPLEX EVENT FEES WITH PRICE SETS

Price sets play a role similar to custom data fields and profiles, but support options for event fees instead of basic data collection. Here's an example of how a price set looks to a person who is registering for a Conference that includes optional pre-conference training sessions, meals and lodging:

The screenshot shows a 'Conference Fee' form. It includes a 'Registration Fees' section with a dropdown menu set to 'General Admission - \$ 125.00'. Below this is a 'Pre-Conference Trainings' section with two checked checkboxes: 'Using Social Networking Tools for Organizing - \$ 25.00' and 'Getting the Most out of your Blog - \$ 25.00'. There are also input fields for 'Meals (per meal cost) - \$ 10.00' (set to 1) and 'Lodging (per night) - \$ 100.00' (set to 1). A note indicates the cost is \$10 per meal and \$100 per night. The 'Total Fee(s)' is calculated as \$ 285.00.

We saw earlier that event creation involves setting up event fees. The standard fees layout form is a very simple structure, allowing you to create a list of fees and their labels. The resulting layout allows the registrant to select one option from the list. Often, this single-option format does not meet the complex demands of your event registration structure. Price sets allow you to create multiple registration fee fields and assign the entire set to an event.

To create and manage price sets:

- navigate to **Manage Price Sets** and choosing the **Events** link OR
- navigating to **CiviEvent > Manage Price Sets** and choose **Administer**.

Similar to custom data sets, you begin by creating a new price set and then adding specific fields.

Creating a New Price Set

To create a new price set:

1. Click **Add Set of Price Fields**.
2. In the Price Set form, enter the name of your price set, whether it's used for events or contributions, and a description.
3. Press **Save**.
4. A form appears for you to create the first field in your price set.

Creating a New Price Field

Begin by entering a name for the event item in the Field Label.

Workshop Fees with meals and lodging - Price Fields

SaveSave and NewCancel

Field Label *Pre-conference Training

Input Field Type *CheckBox

Participant Count

Select the html type used to offer options for this field

Enter a value here if you want to increment the number of registered participants per unit against the maximum number of participants allowed for this event. For example, if this price field is for a table at a fundraiser which seats eight people, you would set Participant Count to 8.

Multiple Choice Options

Enter up to ten (10) multiple choice options in this table (click 'another choice' for each additional choice). If you need more than ten options, you can create an unlimited number of additional choices using the Edit Multiple Choice Options link after saving this new field. The option 'label' is displayed on the form, while the option 'value' is stored in the contact record. The label and value may be the same or different. Inactive options are hidden when the field is presented.

	Default	Label	Amount	Weight	Active?
	☐	Collaboration Skills	250.00	1	☒
▼	☐	Intro to Group Facilitation	250.00	2	☒
▼	☐	Advanced Group Facilitation		3	☒

The Input Field Type has a structure similar to custom data fields, with some unique qualities and usage relevant to fee structures.

- **Text/Numeric Quantity:** allows you to set a unit price. When the form is presented to the registrant to fill it, it displays a text box where the registrant enters a quantity. The quantity entered is multiplied by the unit value to calculate the fee.
- **Select:** displays a dropdown box where the registrant selects one option from the list.
- **Radio:** displays multiple options in a list, allowing the registrant to select one fee choice.
- **Checkbox:** displays fields in a list where the registrant can select or unselect any number of options.

You can combine these field types to create virtually any fee structure.

Enter a number in the Participant Count field if you want to increment the number of registered participants per unit against the maximum number of participants allowed for this event. For example, if this price field is for a table at a fundraiser which seats eight people, you would set Participant Count to 8.

For Text/Numeric Quantity fields, enter an amount in the Price field. For Select, Radio and Checkbox types you will enter a price for each option in the table of options (shown in the screenshot above).

If you want to display the price next to the event item, check the Display Amount? box.

As when creating other custom data, you can enter a description for the Field Help, decide whether the event item is required, select whether the event item is visible to the public or only to the administrator in the Visibility field, and indicate whether the event item is Active. These fields are described in the chapter on extending core data.

Next, you can either press **Save** to finish configuring this event item, or **Save and New** to create another price field for this price set.

Once you finish configuring your price set, you can add it to your event in step 3 where you configure the event fees. Select the name of your price set in the Price Set field as shown in the following screenshot.

Price Set

Workshop Fees with meals and lodging

Select a pre-configured Price Set to offer multiple individually priced options for event registrants. Otherwise, select "-none-" and enter one or more fee levels in the table below. Create or edit Price Sets [here](#).

As with custom data fields, it is to your advantage to give thought to the structure of your registration fees and build the price set before creating the event. However, if you begin the event creation process and determine that you needed to construct a price set, you can complete the process, create the price set, and then return to the event configuration page to assign the price set.

Price sets can be reused in multiple events. This is particularly helpful for organizations that run multiple events in a series, such as a regional training seminar program.

33. CIVIEVENT EVERYDAY TASKS

This chapter outlines a variety of tasks related to managing an event that you have set up in CiviEvent.

DASHBOARD

The CiviEvent Dashboard displays an Event Summary table, providing a summary of up to ten scheduled and recent Events. Click the **Event name** to view the event as it will be displayed to site visitors. Click the **Participants count** to see a list of participants.

To run your own customized searches, click **Find more event participants** at the end of the page. Here you can search by Participant Name, Event, Date Range and Status.

From the Dashboard you can also:

- click on **Manage Events** to find and manage specific events
- click on **New Event** to create a new event page
- use the icons for RSS feeds and calendars to use the data in external applications.

FINDING AND REPORTING ON PARTICIPANTS

This section describes some common event searches.

Overview of participants for all upcoming events

1. Navigate to **Events > Dashboard**
2. Click the **Counted:** link to see all the contacts for an event.

If any count is zero, the associated text will not be a hyperlink. Some participant roles may not count for the event total, such as someone who is on the clean-up duty.

Find participants for any event with a variety of criteria

1. Navigate to **Events > Find Participants**.
2. In the event name field, start typing to see a list of events. Click on the event you want. Set additional search choices for the fields you want to see.
3. Click Search.

When the search returns results, you have the opportunity to select all of the resulting participants or a subset, and perform an **action** on them. Available actions include:

- **Batch update participants via profile:** this feature is useful if you wish to edit multiple fields for multiple participants in a table grid layout. Note that you must create the profile set you wish to use before implementing this action. If you are not familiar with how Profiles work, please read the chapter on that topic before using this feature.
- **Cancel Event Registrations** for the selected participants.
- **Change Participant Status** for the selected participants.
- **Delete Participants:** deleting participants does *not* delete the contact record; it will delete all transactions and activities associated with the participant *for this event*. Note that this action cannot be undone.
- **Export Participants:** this allows you to export a predefined set of fields or create your own custom set of fields (which can be saved for reuse). The software exports to CSV format, which can be easily opened in standard spreadsheet software or directly used for mail merges.
- **New Smart Group:** smart groups are saved search results based on defined criteria, similar to a query. The advantage of a smart group is that the system will rerun the query using the criteria you have defined each time you open the smart group. This is particularly helpful for complex search criteria that you need to view on a regular basis.
- **Print Event Name Badges:** select the type of badge you require and a printable PDF will be generated with the names of the selected participants.
- **Send an Email to Contacts:** CiviCRM also lets you generate an email on the fly to your search result list. For example, you may want to let recipients know details about the event in advance, such as parking options or changes to the programme.

List participant's individual fees

1. Navigate to **Search > Custom Searches**.
2. Click on **Event Aggregate**.
3. Choose your search criteria, and click **Search**.

Create an event report from a template

1. Click **Reports > Create reports from templates**.
2. Scroll to see the templates in the Event Report Templates section.
3. Click the name of the report template to create a new report.
4. Choose the desired report criteria, then click **Preview Report**.
5. Expand the area labeled Create Report.
6. Choose a report title, and other choices as desired.
7. Click **Create Report**. Typical results appear in the following screenshot.

Template

MASS REGISTRATIONS

CiviEvent offers the time-saving feature of registering multiple contacts for an event at one time (or as a "batch"). Returning to the youth leadership workshop scenario, Arts in Action anticipate a high rate of attendance from participants at the previous workshop. The staff perform a search to find previous participants and mass register them, setting each individual's participate status to "pending". The list of pending contacts is then used to call or email people to see if they are coming. If the person says they will attend, the event organizer can change the person's status from "pending" to "registered".

Steps for Mass registration:

1. Search for the set of contacts you are interested in (Arts in Action would navigate to **Search > Find Participants** to search for all participants at the previous workshop).
2. On the search results page, either choose **select all** or put a check mark next to each contact you are interested in. A sample search results page appears in the following screen-shot.

Find Contacts

Name or Email is... in with

- any contact type - School - any tag -

15 Results Contacts IN School ...AND... Group Status - "Added" [» Advance](#) [» Search](#)

Select Records: ☒ All 15 records ☐ Selected records only

A B C D E F G H I J K L M N O P Q R S T U V W X
Z [All](#)

☐	Name	Address	City	State	Postal	Country	Email	Phone	Action
☐	 Bell, Isaac								View Edit
☐	 Bell, Lizzy								View Edit
☐	 Camp, Greg								View Edit
☐	 Camp, Sophia								View Edit
☐	 Jason, Al								View Edit

3. From the **actions** list just above the search results, choose **Add Contacts to Event** then click **Go**.
4. Complete the registration form, choosing the appropriate action choices for this set of people, such as setting the Participant Status to pending. Choices made here will be applied to all contacts in this set.
5. Click **Save**.

Limitations of mass registrations

The action choices you make (in Step 3) are applied uniformly to the entire set of selected contacts. To work around this limitation, do a mass registration several times, each time choosing the desired action choices for that set of contacts. For example, you might mark one set of contacts you plan to call and invite with a Participant Status of "pending", then add another set of contacts to the event, such as event leaders you know will attend, with a Participant Status of "registered".

You cannot apply contribution information, such as a pay later contribution or a credit card transaction, in a batch action. Therefore, mass registration is best for free events or for contacts who are not required to pay a fee at this point. You can always add payment details for individual contacts later on.

IMPORTING REGISTRATIONS

Arts in Action is collaborating with a local school for its youth leadership workshop; the school is handling their students' registrations and sending a spreadsheet after the event which Arts in Action will then import into CiviCRM. It is important to record the event registration inside CiviCRM to enable Arts in Action to consolidate accurate information and enhance interactions and reporting for future event participants.

Importing registration information is a quick way to add a bunch of registrations to the event. The data to be imported must be available in a comma-separated values (CSV) file. If the majority of the contacts are already in CiviCRM, it may be faster to do a mass registration action as mentioned earlier in this chapter.

Steps for importing registrations

1. Prepare the data in the CSV file: make sure date fields (if used) are valid dates, and if some of the contacts are already present as contacts in CiviCRM, make sure the first name, last name and email address match what is already in CiviCRM. Differences between an imported contact's and an existing contact's information can cause a duplicate record to be created. While duplicate contacts can be merged later, it's preferable to avoid the situation. The rules for determining duplicate contacts can be defined by navigating to **Administer > Manage > Find and Merge**.
2. On the navigation menu, choose **Events > Import Participants**.
3. Browse to the data file on your local computer.
4. Select the appropriate contact type, date format and other options, and click **Continue**.
5. Match the fields of your CSV file to the CiviCRM fields.
6. If this is something you may repeat in the future, check the **Save this field mapping** box.
7. Preview and Save.

PROMOTING YOUR EVENTS

Getting the word out and building excitement about your event can take many forms, but most important is to ensure that the event is prominently listed on your organization's website and your public calendar. Then you can use various strategies to let people and organizations know about it, and encourage participants to help promote the event.

If you are publicising your events on another website or organization's calendar, make it clear how people are expected to register. For example, some social networks have a built-in event registration system, such as Facebook events. Other organizations that are helping to publicise your event may have their own event registration systems. Make sure that no matter where you publicise the event, it is obvious how the person is expected to register.

Display an event description or registration on the website

Drupal:

1. Navigate to **Events > Manage Events** and then click **more > Live Page** for the event.
2. Copy the URL for the event page.
3. Create a Drupal menu item for this URL or paste the URL into any Drupal page.

Additionally, you can enable a Drupal block that lists all upcoming public events. To learn more, go to the CiviCRM wiki: <http://wiki.civicrm.org/confluence/display/CRMDOC/Event+Listings>

Joomla!:

1. Go into the Joomla! control panel.
2. Choose **Menu Manager > Your menu name**.
3. Click **New**.
4. Expand **CiviCRM > CiviCRM Events** and click the **Event Info** item.
5. Choose the event from the **Select an Event** list on the right side of the page.
6. Click **Save**.

Add the participant list to the event information page

Some organizations may wish to publicise their guest list as part of the event description to encouraging others to register.

1. Navigate to **Events > Manage Events**, then click the **Configure** link for the event.
2. Expand the section labeled **Public Participant Listing** and copy the URL in the description area.
3. Click the link **Event Information and Settings**.
4. Paste the URL from step 2 into the event summary or event description, then click **Save and Done**.
5. Optionally, you can share the URL via other communication vehicles such as within an email message, associated web sites and any other places you are promoting the event.

LIST OF UPCOMING EVENTS

Sometimes you may want to give an external organization or web site a link to a list of your upcoming events, that they can place anywhere on their website. For example, the school that is collaborating with Arts in Action might want to make information about future workshops easily accessible to their students' parents by including it in the school web site.

To get the URL:

1. Navigate to **Events > Manage Events**.
2. Click on the **globe** icon on the top right of the page.
3. Copy the URL.
4. Send the URL to the other organisation for inclusion in their site.

The only drawback is that the page will appear visually like your own website.

RSS FEED FOR ALL UPCOMING EVENTS

This lets visitors subscribe to all your events in the RSS feed reader of their choice. Many website management systems also allow a website to subscribe to any RSS feed and present the information within their layout.

1. Navigate to **Events > Manage Events**.
2. Click on the orange and white square icon on the top right of the page.
3. Copy the URL to share or embed into your website.

ALLOWING PEOPLE TO TELL A FRIEND ABOUT AN EVENT

This offers people the chance, when they register for the event, to email their friends and colleagues about it. CiviCRM will then capture the friend's email and create a Tell A Friend activity for the email, and create a corresponding activity in the participant's record.

1. Navigate to **Events > Manage Events** and click the **Configure** link for this event.
2. Click on the **Tell a Friend** link.
3. Click the checkbox to enable **Tell a Friend** for this event.
4. Provide an appropriate message to include for this event.

The Tell A Friend option will now appear in the event registration page.

SHOWING EVENTS IN A CALENDAR

Many web sites include a graphical calendar that can display upcoming events by the month, week or day. It is very useful to get your events on relevant calendar pages. Often individuals maintain personal digital calendars to track events along with their personal meetings and appointments; you can make it easy for them to copy your event to their calendars.

The standard format for sharing information between calendar systems is called iCal. CiviCRM can export a static iCal file as well as a dynamic iCal feed.

Getting a static list of events into another calendar system

1. Navigate to **Events > Manage Events**.
2. Click on the square icon displaying "31" on the top right of the page.
3. Save the iCal file on your local computer.
4. Go into the other calendar system and find the import iCal file tool.
5. Within the import wizard of the other calendar system, browse to and upload the iCal file from your local computer.

New CiviEvents created later will *not* appear in the other calendar system. These steps will need to be repeated to show new events. Dynamic updates are described in the following procedure.

Getting a dynamic list of events into another calendar system

1. Navigate to **Events > Manage Events**.
2. Click on the square green icon displaying the letters "ICAL" on the top right of the page.
3. Copy the URL of the page that opens.
4. Go into the other calendar system and find the import iCal feed tool.
5. Within the import wizard of the other calendar system, paste the URL from step 3.

From this point on, any new public events created in CiviEvent will automatically appear within the external calendar system.

Displaying an event report on CiviCRM 's home dashboard

If you haven't already created any Event Reports, see the following chapter Reports and Analysis for instructions on how to create reports. You must then ensure that the report you want to display is available for the dashboard:

1. From the navigation menu, click on **Reports** and select the report you wish to display.
2. In the **Report Settings** area, check the **Available for Dashboard?** box.
3. Click **Update Report**.

Once the report is available for the dashboard, you can then:

1. Navigate to **Home** to view the dashboard.
2. Click **Configure Your Dashboard**.
3. Drag the desired report from the **Available Dashlets** area into either the Left Column or Right Column of the dashboard area, and click **Done**.
4. You should now see your report on your home dashboard. To view the latest updated information for your report as well as any other items you've included on your dashboard, click **Refresh Dashboard Data**.

WAITLISTS

Your organization may have limits on attendance, such as a 25-person limit for a training workshop or a 200-person limit for a fund-raising dinner. CiviEvent lets you set the maximum number of people allowed to register for your event. When registrations reach that number, CiviEvent will not allow other people to register, but will instead send an automatic message saying, "The event is currently full." This message can be customized by the organization when creating a new event, and you can let people add themselves on a first-come-first-served basis to a waitlist.

To create an event with a waitlist:

1. Navigate to **Events > Manage Events**.
2. Click the **Configure** link next to your event.
3. Click the **Event Information and Settings** link.
4. On the **Info and Settings** form, check the **Offer a Waitlist?** box.
5. Click **Save**.

APPROVING REGISTRANTS

Many events are open to everyone, but there may be times when your organization invites only specific people to the event. For example, you could invite volunteers who have donated 100 or more volunteer hours to an appreciation dinner. The people invited may talk about the event to their friends, and possibly forward the information. With CiviEvent, you can check who has registered and approve only the people invited.

To create an event that requires approval:

1. Navigate to **Events > Manage Events**.
2. Click the **Configure** link for your event.
3. Click the **Online Registration** link.
4. On the Online Registration form, check the **Requires Participant Approval** box.
5. You can then customize the text for the Approval Message. You can also limit the amount of time participants have to complete their registration after approval by entering the time in hours in the **Pending participant expiration** field. For example, if you want to give participants 3 days to complete their registration, enter "72" in that field.
6. Click **Save** or **Save and Done**.

Now, when a person registers for the event, they will get a reply that says, "Your registration has been submitted. Once your registration has been reviewed, you will receive an email with a link to a web page where you can complete the registration process." This reply can be customized to your organisation's needs.

MANAGING PARTICIPANTS

After creating your event and providing the registration form to web site visitors, you can manage your participants through the CiviEvent administrative tools. In this section we will discuss how these administrative tools are used.

CiviEvent lets you:

- register participants manually
- search through participants based on a variety of criteria
- export participant lists
- perform a number of other functions on your event records.

The Events dashboard brings all your events and participant information together in one place (see screenshot).

The screenshot displays the CiviEvent dashboard. At the top, there's a navigation bar with 'Event Summary' and links to 'Manage Events' and 'New Event'. Below this is a table of events. The first event is 'Book Club' (ID 7, Meeting, Public, April 26th, 2010). The second is 'Fall Fundraiser Dinner' (ID 8, Fundraiser, Public, April 26th, 2010 to May 15th, 2010). To the right of each event, there are statistics: 'Counted: 0', 'Not Counted: 0', 'Not Counted Due To Status: 0', and 'Not Counted Due To Role: 0'. Below the events table is a section titled 'Recent Registrations'. It contains a table with columns: Participant, Event, Fee Level, Amount, Event Date(s), Registered, Status, and Role. The first registration is for 'Compunentor' (a typo for Componentor) for the 'Fall Fundraiser Dinner' event, with a fee level of 'Single' and an amount of '\$ 50.00'. The event date is 'March 3rd, 2010 - March 5th, 2010', and the registration date is 'February 1st, 2008'. The status is 'Attended' and the role is 'Volunteer'.

Event	ID	Type	Public	Date(s)	Participants
Book Club	7	Meeting	Yes	April 26th, 2010	Counted: 0 Not Counted: 0 Not Counted Due To Status: 0 Not Counted Due To Role: 0
Fall Fundraiser Dinner	8	Fundraiser	Yes	April 26th, 2010 to May 15th, 2010	Counted: 0 Not Counted: 0 Not Counted Due To Status: 0 Not Counted Due To Role: 0 (max 50)

Participant	Event	Fee Level	Amount	Event Date(s)	Registered	Status	Role
Compunentor	Fall Fundraiser Dinner	Single	\$ 50.00	March 3rd, 2010 - March 5th, 2010	February 1st, 2008	Attended	Volunteer

Registering a Participant Manually

Although CiviCRM helps alleviate data entry for event registration by allowing your constituents to register directly through your website, a segment of your contacts may continue to register by mail, phone, or in person on-site. Your staff will then need to enter the registration information manually.

For example, when a person calls the office to register for an event, the staff person who takes the call can:

1. enter the person's name in the **Quick search** box
2. select the contact from the results
3. click the **Events** tab on the caller's contact record
4. add the person to the event.

The Events tab, shown in the following screenshot, displays a summary list of the contact's past event attendance and provides a link for registering the contact for a new event.

Ms. Susan Jones

Actions ▾ Edit Delete

Summary Contributions 2 Pledges 0 Memberships 0 **Events 1** Activities 4 Cases 0 Grants 0

Relationships 2 Groups 1 Notes 1 Tags 1 Change Log 5

This page lists all event registrations for Ms. Susan Jones since inception. Click [Add Event Registration](#) to register this contact for an event. Click [Submit Credit Card Event Registration](#) to process a new New Registration on behalf of the participant using their credit card.

+ Add Event Registration + Submit Credit Card Event Registration

Event	Fee Level	Amount	Registered	Event Date(s)	Status	Role
Fall Fundraiser Dinner (participants)	Single	\$ 50.00	February 15th, 2011	August 4th, 2011 - August 6th, 2011	Registered	Attendee

[View](#) [Edit](#) [Delete](#)

There are two options for registering the contact:

- **Add Event Registration:** for people who pay later, such as by sending a check or paying when they arrive at the event.
- **Submit Credit Card Event Registration:** for people paying immediately with a credit card. This option is available only if you've configured a payment processor that allows direct payments through your web site. If you are taking a registration over the phone you can ask them for their credit card information and enter it manually.

The interface for both options is very similar, with the exception of those fields that record payment details.

New Event Registration

Save

Save and New

Cancel

Participant Ms. Susan Jones

Event * Rain-forest Cup Youth Soccer Tournament - Se

» Include past event(s) in this select list.

Participant Role * ☒ Attendee ☐ Volunteer ☐ Host ☐ Speaker

Registration Date * 02/16/2011 Time * 04:20PM (clear)

Participant Status * Registered

Event Source

Source for this registration (if applicable).

Event Fee(s) * ☐ \$ 800.00 Tiny-tots (ages 5-8)
☒ \$ 1,000.00 Junior Stars (ages 9-12)
☐ \$ 1,500.00 Super Stars (ages 13-18)

Event Fee Level (if applicable).

Record Payment? ☒

Check this box to enter payment information. You will also be able to generate a customized receipt.

Payment Information

Contribution Type * Event Fee

Select the appropriate contribution type for this payment.

Total Amount \$ 1000

Actual payment amount for this registration.

Received 02/16/2011 (clear)

Paid By Check

Check Number 4892

Transaction ID

Payment Status Completed

Registration Confirmation and Receipt

Send ☒ Confirmation and Receipt Automatically email a confirmation and receipt to s.jones@example.org?

Receipt From

Confirmation Message Enter a message you want included at the beginning of the confirmation email. EXAMPLE: 'Thanks for registering for this event.'

Contact our Tournament Director for eligibility details.

Notes

As you work through this form, certain sections of the page change to reflect choices you have made. For example, when you choose the event you are registering the contact for and select a participant role, the form will automatically load predefined custom data fields that pertain to those selections.

If the event selected is a paid event, you will see an event fees section which has been defined in the event configuration details, and an option to record the financial transaction details (Record Payment) will be visible. This leads us to an important concept central to CiviEvent (as well as other modules): event registration records in CiviCRM are independent of, but can be related to, a financial transaction. While this may seem confusing to organizations accustomed to viewing event registrations as essentially a financial transaction, it offers an important and valuable distinction.

An event registration communicates the contact's participation in the organization's event. A corresponding financial transaction indicates the monetary value associated with that participation. While related, the two are distinct.

The distinction is best understood by considering the common scenario of an organization waiving fees for a V.I.P., a speaker, or someone who participating in the event in a limited way. In such cases, you want to register the individuals but may not want to create an associated financial transaction. CiviCRM respects this distinction by recording the event registration record under the Events tab, recording the financial record under the Contributions tab, and then creating a link between the two records.

If the event is a paid event, click the **Record Payment** checkbox and enter information in the transaction fields that are displayed. This process essentially links together the event registration and the contribution record for this contact. After recording the registration, you will be able to view the event registration record and see the related contribution record at the bottom (see screenshot). If you do not select the Record Payment check box, only a registration record will be created.

Ms. Susan Jones

Actions

Edit

Delete

Summary

Contributions 2

Pledges 0

Memberships 0

Events 1

Activities 4

Cases 0

Grants 0

Relationships 2

Groups 1

Notes 1

Tags 1

Change Log 5

Click Record Contribution (Check, Cash, EFT ...)

to record a new contribution received from this contact. Click Submit Credit Card Contribution to process a new contribution on behalf of the contributor using their credit card.

Record Contribution (Check, Cash, EFT ...)

Submit Credit Card Contribution

Current Year-to-Date - \$ 1,550.00

Completed Contributions - 2

Avg Amount - \$ 775.00

Total Amount - \$ 1,550.00

Completed Contributions - 2

Avg Amount - \$ 775.00

Amount	Type	Source	Received	Thank-you Sent	Status	Premium
\$ 50.00	Event Fee	Fall Fundraiser Dinner: Offline registration (by dave@civcrm.org)	February 15th, 2011 12:00 AM		Completed	View Edit Delete

34. REPORTS AND ANALYSIS

There are a number of techniques for reporting on and analysing your events and participants.

The **event dashboard** gives a quick overview of your upcoming events showing for each event the number of registrations and their statuses (how many are registered, how many are counted, how many are pending for different reasons). The dashboard is limited to 12 events scheduled to start at a date closest to today. This is most likely not to be sufficient to organizations with many scheduled events.

[insert screenshot]

Other ways that provide more detailed and customised analysis using CiviCRM's search features and CiviReport.

If you are interested in the financial aspects of events, you may also find the reports and analysis chapter in contributions useful.

EVENT AND PARTICIPANT REPORTS

Reports have several features that cannot be accomplished by search. For instance, you cannot aggregate data from multiple events at once or limit the date of registration very flexibly. Also, repeating the same searches over and over can be very time consuming. Searches can be set as Smart Groups but this leads to a proliferation of groups.

The solution is to set up reports for each event or a collection of events. The reports can be automatically assigned to a designated submenu (e.g. under Events > Reports) or made available as dashlets for the main dashboard.

Out of the box, CiviCRM comes with five reports designed to help you analyse events. Of these, **Event Participant Report (List)** is the most useful. It will display both participant and individual data and all custom data. All of these can also be used as filters.

The **Event income report (detail)** and **Event income report (summary)** work together to show details of revenue from events. The summary report is suitable for showing total income for a series of events, all your conference in 2011, for example. Clicking on one of those events will give you more details about the event breakdown of the income per role and per status. It can also be displayed in graphical form as Pie Chart or Bar Chart.

SEARCHING BASED ON PARTICIPANT DATA

CiviCRM makes an important distinction between contacts and event participants. Sometimes it is useful to get the answer to your event related question in terms of contacts, e.g. which contacts came to events in 2011. Other times it is more useful to have the answer in terms of participants, e.g. how many training sessions did we deliver as part of our sexual health education programme this year. It is important to take this into consideration when carrying out a search for event attendees.

The **Find participants** search allows you to search based on participant data and return participant data. The **Advanced search** allows you to search based on most participant information and combine that with other contact information and return contacts. You can also choose **Participant** from the **Display Results As** column to show participants rather than contacts.

Searching based on these criteria gives you access to simple totals. You can also export your search results as CSV for further analysis in your spreadsheet software.

MORE ANALYSIS

If you can't do what you want with a built in report or search, consider commissioning a new report or custom search. Read the CiviReport section for more information.

MEMBERSHIP

- 35. WHAT IS CIVIMEMBER?
- 36. WHAT YOU NEED TO KNOW
- 37. MEMBERSHIP SET -UP
- 38. EVERYDAY TASKS
- 39. REPORTS AND ANALYSIS

35. WHAT IS CIVIMEMBER?

CiviMember aims to automate membership administration as much as possible. CiviMember allows you to:

- track contacts through the membership cycle
- set self-service options for membership sign up and renewal
- set automated renewal and thank-you messages
- grant additional web site privileges for specific members.

Memberships can be free or paid, and have simple or complex pricing structures. CiviContribute is required to handle membership fee payments.

All memberships show up on contact views and in the membership dashboard. They can be searched for through the Membership Search or Advanced Search and there is a built in report template.

SCENARIO: DRIVING MEMBERSHIP FORWARD

The Atlantic Region Public Transit Association (ARPTA) has a complex requirement with four membership categories:

- **Regular Members:** Public transit systems. There are three tiered levels within this category, based on the size of the system. Membership is organization-based, and all employees receive access to member benefits, such as discounted rates at Association events.
- **Affiliate Members:** Businesses providing goods and services to the transit industry, such as bus and rail car manufacturers, engineers and consultants, parts and component manufacturers, etc. Membership dues are a flat rate for all Affiliate Members. Membership is organization-based, and all employees receive access to member benefits, such as discounted rates at Association events.
- **Associate Members:** Students, government representatives, public interest groups, research institutions, and other interested parties. Membership dues are a flat rate for all Associate Members. Membership is individual-based.
- **Honorary Members:** Retired transit system executives and others who have made a notable contribution to the industry and Association. Membership is individual-based and free for life.

When the ARPTA membership administrator, Sue, initially configured the membership types she created various separate membership types and rules to account for each. This was all easily managed by CiviMember. Initially, they carried on with manually processing membership renewals and new sign-ups while the system bedded in.

Last year ARPTA's membership committee began a focused outreach to non-member public transit systems (Regular Member category) and non-member businesses working in the public transit industry (Affiliate Member category). They wanted their members to renew online and pay through a credit card.

To accomplish this, they created a membership sign-up/renewal page and publicised this in a series of emails, blog posts and promotions on various social media platforms. The sign-up page is available to all website visitors, whereas the renewal page is visible only to contacts who are already members, after they log in to the members-only section. This streamlines their sign-up process, eliminates a lot of paperwork and gives Sue a clear view of new sign-ups, recent renewals and expired members that need to be chased. Through CiviContribute, she can produce a monthly spreadsheet for the accounts department with all membership fees received, which they import into their accounting software. With the time she saves on paperwork she is able to engage more with members and is more involved in the annual conference.

36. WHAT YOU NEED TO KNOW

This chapter covers the major areas you should think about before beginning to work with CiviMember.

Spend some time evaluating your organisation's membership structure. List the membership types your organisation offers and work out how they can be modelled in CiviCRM.

In CiviMember, each membership is effectively treated as a membership of an organisation. In most cases, this is membership of your organisation; however it is important to understand this before you begin working with CiviMember.

Below, you'll find an outline of the relevant concepts, followed by a list of questions that will help you begin to translate your membership model into CiviMember. A note at the end of the chapter indicates other CiviCRM components you'll need to set up for CiviMember to work.

KEY CONCEPTS

Using CiviMember you will be working with these terms and concepts so it is important to understand how these concepts translate into your organisation's terminology and culture.

Members, Contacts and relationships

Members are simply contacts in your database with a particular membership. The contact may be an individual, organisation or some other contact sub-type, but it is always a contact: there is no separate member entity.

If you need to cancel or delete a membership, the contact will remain on the system with all other parts of their record intact. Note that you would *delete* a membership if you entered it error, for example if you made Jo Smith a member instead of Joe Smith. But if Jo Smith was a member and called after 6 months wanting to end her membership, you would *cancel* that membership. In this case, the record of the membership would remain with the start and end date. When the record is deleted then it is completely removed.

Relationships are ways to create connections between contacts in your database. Before creating memberships, consider whether relationships might be more appropriate for your requirements. Have a look at relationships in the Contacts chapter of the Basic Set-up section to learn more about creating relationships between contacts.

Membership Types

CiviMember allows you to create various types of membership; some could be free, others paid. Different types can have different renewal rules, periods and benefits. Take some time to assess your organisation's existing memberships and needs, as it's easy to over-engineer your membership structure and create more types than you actually need.

As mentioned above, CiviMember treats each membership as membership of an organisation. If you are using CiviCRM to manage memberships of several organisations or regional branches, you can set up each branch as an organisation and create the membership types for each of those branches/organisations.

Your contacts can inherit membership based on relationships to other contacts in the way that staff of the membership organisations of ARPTA inherit their employers membership.

Periods and renewals

Membership periods can be fixed or rolling. In other words, membership can always start at the same date, such as January 1, or an individual can start an annual membership that runs for exactly one calendar year. In the case of fixed dates, you can set a rollover date so that sign-ups after this date cover the following calendar year as well.

The renewal process is as important as the initial sign-up. Allow time to configure and test renewal reminder templates, especially if you have complex membership structures and want to customise messages based on member types or other factors.

Membership Status Rules

The default set of status options provided by CiviMember is:

- **Pending:** someone who has requested membership but has not paid, or is awaiting approval.
- **New:** payment has arrived, or membership has been approved.
- **Current:** new members move to this status after a certain period of time.
- **Grace:** when the end of the membership period is reached, someone who has not renewed membership enters this status for a period of time.
- **Expired:** when the grace period expires, the member moves to this status and no longer receives membership discounts or mailings.
- **Deceased:** this status keeps a deceased contact's record in the system but removes the contact from all further communications.

You can easily add to or amend these options, and you can allow any of these to count as a live membership. Some organisations like to give a 30 day grace period following membership expiry so that they can chase the member to renew, and will allow the membership to stay live during this period. Alternatively, a new membership might need approval and may not gain the member benefits until this has been given. *New* is really just a label for convenient separation of new memberships and renewals.

Membership payments

Memberships in CiviCRM can be free or paid, and there can be different membership fees for each individual membership type.

CiviCRM handles paid memberships by linking membership records to contribution records. A membership record documents a contact's *relationship* with the organisation, while the corresponding financial transaction indicates the monetary value associated with that membership.

Membership + Contribution

CiviCRM respects this distinction by storing the membership record under the membership tab, storing the financial record under the Contributions tab, and then creating a link between the two records.

Price sets

If your memberships types have a complex price structure, you might want to consider making use of price sets.

Price sets allow you to set fee structures which include compulsory and optional elements and the ability to make some fees available only for some date ranges. You can also add negative amounts or discounts. Thus it is possible to have a different price for early bird payments or payments in different months.

Renewals

There is an important distinction between adding a new membership and renewing a membership. If someone is coming to the end of their membership life-cycle and wants to continue being a member, in most cases they should use CiviMember's renew workflow rather than creating a new membership. Membership *up-sell* allows contacts to change membership type as part of the renewal process.

In the renewal process, the membership record end date is extended to reflect a new membership period. For example, if your organisation's membership is handled on an annual basis from January through December, an existing end date of December 31, 2010 would be extended to December 31, 2011. CiviCRM calculates the end date extension based on the configuration for the specific membership type being renewed. Note that a members' *join date* (or **Member Since** date) is not modified when a membership is renewed, so you always know when the contact first became a member.

If applicable for the membership type, a contribution (financial) is recorded as part of the renewal process. This will create a contribution record and attach it to the membership record. Each new contribution is added to the membership record.

If your payment processor supports it, CiviMember can automatically process renewal payments. Members will pre-authorise their credit card, the payment will be taken automatically, and they will receive appropriate thank-you and receipts from CiviCRM.

Over time, and after a few renewals, the membership record will be a single membership record whose end date is extended, with multiple related financial transactions representing each renewal purchase.

Key questions

Once you have understood the concepts outlined above, and before you begin to work with CiviMember, answer the following questions:

- What are your membership periods?
- Are your membership terms rolling or fixed-date?
- Is membership based on an individual, a relationship to an organisation or being part of a household? For instance, a social service agency may sign up an entire family as a member, while a policy-making organisation may sign up other organisations as members.
- If memberships are organisational, do staff of those organisations inherit the membership?
- Do you want to provide a special members area of your website, or offer them discounts or extra online content as a result of their membership? If so, you should explore CMS integration modules such as Drupal's CiviMember roles integration module.
- Do you want to expose self-service membership sign-up and renewal through your website?
- If your membership(s) are not free, what payment methods will you accept?

Also ask why your membership structure is the way it is. Perhaps the workflow was set up based on a previous technological or organisational limitation that doesn't apply now that you are using CiviCRM.

If you are having trouble modeling your membership structure in CiviCRM, ask in the forums about the problems you are having. There may be other ways to model your data, or simple changes you can make to CiviCRM's behavior to better fit your needs.

OTHER CONSIDERATIONS

If you will be charging for memberships, you need to review the CiviContribute chapter and in particular the section on payment processors.

Members area on your website

CiviMember can be used in conjunction with your CMS to create a members only section of your website. Both Drupal and Joomla have integration modules that can be used to do this. A typical workflow would be that a contact creates an account on your site and becomes a member of your organisation using a CiviMember membership sign up page. They then get access to extra content on your site. This extra content could be from your CMS or it could come from your CRM, for example a detailed members directory, or a list of private events that are only available to members.

37. MEMBERSHIP SET-UP

There are two main things to do when configuring CiviMember. Configure your membership types, and (if necessary) configure your membership sign up and renewal pages which enable visitors to your website to sign up and renew their memberships online. If your memberships are paid, you'll also need to do some basic configuration of CiviContribute and set up a payment processor.

MEMBERSHIP TYPES

Membership types are the various membership categories that your organization offers. You can configure an unlimited number of membership types and set various options for each of them. To define your membership types, click on **Administer > CiviMember > Membership Types > Add Membership Types**.

The membership name is displayed throughout the system, on both public and backend pages, so it is worth choosing a good one (though you can always change it later).

A membership organisation is required for each organisation. This membership type will apply to. For most organisations, this will be *your* organisation. If you want to model membership of multiple organisations (including branches of organisations) you can set the organisation here for each organisation that you want to model the membership of.

The **minimum fee** field is the place to enter your desired membership fee. Zero indicates a free membership.

You can choose a contribution type that the membership fee will be recorded as. By default you should probably use 'member dues' but it might make sense for you to choose a different type. This type can be overridden when recording a membership in the backend and for specific public membership sign up pages.

Auto-renew options allow you to set a membership to automatically renew. These work well when combined with payment processors that support recurring donations. You can set memberships to offer or require auto-renew. You then need to implement this option on a membership sign up and renewal page (see below).

There are two options for period type. Fixed means that the membership for all members starts at a specific point in the year. **Rolling** means that the membership will start on the date that the membership is entered into the system. For fixed period memberships you can also identify a **rollover date**: the point after which new memberships are entered as belonging to the next dues period. Note that you can override start and end dates when entering memberships manually via the backend.

Membership can be inherited from one contact to another, which is useful in situations such as one finds in professional trade organisations, where they sign up another organisation as the member, but employees of the organisation receive the benefits of membership. Select the Relationship Type to specify which related records should receive membership through the parent record.

You can use the visibility option to make sure certain membership types are handled by an administrator manually (e.g., honorary and lifetime memberships). When you restrict their visibility, they will not be available to add to membership sign up or renewal pages on your website.

Auto renew options

If you want to offer or require auto-renew for this membership, you'll need to select the appropriate option here. Auto renew memberships can only be offered for memberships that have a period of one year or less.

At the bottom of the membership types page there is a block of information for managing renewal reminders. CiviCRM can be configured to send out a reminder email to members as the expiration date for their membership nears. This is particularly helpful for rolling membership types, where contacts may join at any time during the year. To configure the renewal reminder you must first have set up a renewal email template through **Administer > CiviMail > Message Templates**.

MEMBERSHIP STATUS RULES

Membership status rules control the journey that contacts take through the membership process. By default the path is from pending, new, current, grace, expired.

You can define To define membership status rules, click on **Administer > CiviMember > Membership Status Rules**.

You define a status by giving a start and end time which is based relative to either the start or end date of the membership. When updating a membership to decide which status should be applied, CiviCRM looks at each status in turn until it finds one that is valid. That is to say that it takes todays date and sees whether it is between the start and end date for the membership status for that specific membership. If it is, it applies that status.

Membership Status Rules

New Membership Status

Save

Save and New

Cancel

Label *

Display name for this Membership status (e.g. New, Current, Grace, Expired...).

Start Event *

- select -

When does this status begin? EXAMPLE: New status begins at the membership 'join date'.

Start Event Adjustment

- select -

Optional adjustment period added or subtracted from the Start Event. EXAMPLE: Current status might begin at 'join date' PLUS 3 months (to distinguish Current from New members).

End Event

- select -

When does this status end? EXAMPLE: Current status ends at the membership 'end date'.

End Event Adjustment

- select -

Optional adjustment period added or subtracted from the End Event. EXAMPLE: Grace status might end at 'end date' PLUS 1 month.

Current Membership?

☐

Should this status be considered a current membership in good standing. EXAMPLE: New, Current and Grace could all be considered 'current'.

Administrator Only?

☐

Check this box if this status is for use by administrative staff only. If checked, this status is never automatically assigned by CiviMember. It is assigned to a contact's Membership by checking the **Status Override** flag when adding or editing the Membership record. Start and End Event settings are ignored for Administrator statuses. EXAMPLE: This setting can be useful for special case statuses like 'Non-expiring', 'Barred' or 'Expelled', etc.

Weight

8

Weight sets the order of precedence for automatic assignment of status to a membership. It also sets the order for status displays. EXAMPLE: The default 'New' and 'Current' statuses have overlapping ranges. Memberships that meet both status range criteria are assigned the status with the lower weight.

Default?

☐

The default status is assigned when there are no matching status rules for a membership.

Enabled?

☒

Is this status enabled.

Save

Save and New

Cancel

Each status has an 'is current' checkbox which you can use to specify whether the status is current or not. You could use this to gradual end to people's memberships of 'overdue' (end date to 1 month past end date) and 'really overdue' (1 month to two months past end date) which are considered current and then and then 'totally overdue' which is considered to not be current.

MEMBERSHIP SIGN-UP AND RENEWAL PAGES

Membership signup and renewal pages allow visitors to your website to become members of your website and to up to memberships to manage their own memberships. They are created using the same method as contribution pages (even if you want to create a membership page for a free membership).

CiviCRM uses the same page for new memberships as it does for renewals. The renewal page is automatically displayed at the same URL as the membership join page when viewed by a logged in website visitor that has a valid current or expired membership.

When you are setting up membership sign up pages, it is worth remembering that current members will only see the renewal page if they are logged in. If they are not logged in, they will see the become a member page and if they fill that page in, they will get a new membership rather than renew their existing membership. You should design your user interface to avoid this situation. A couple of ways you can do this include requiring log in to view membership signup and renewal pages, and writing text to remind people that they should log in to renew.

The first page allows you to set the title for the membership page and set some basic information like the contribution type etc. There is also a checkbox here to allow people to sign up *on behalf of* an organisation. This is useful if you want to offer organisational memberships. Organisations can't sign up directly because CiviCRM assumes that all interaction on the website is carried out by an individual. In this case, the membership record will then be attached to the organization's record, not the individual's. You may want to *force* all individuals to sign up on behalf of an organization.

The last few fields on this form are less useful for membership sign up and renewal pages.

Amounts tab

This page allows you to set up the payment processor options. You'll need to select a payment processor that The next step of the wizard allows you to configure details related to the financial transactions performed through the Contribution page. If you have configured a credit card transaction payment processor in CiviCRM, you will be able to set up real-time transactions here.

If you are building a contribution page for membership signup and renewal only, consider whether you want to solicit extra contributions. If you do, leave the box checked. If you don't, uncheck it.

Memberships tab

The next step in the contribution page setup wizard is designed specifically for memberships. You should ensure that **Membership Section Enabled** is checked.

This page allows you to set text that can be displayed for both new memberships and renewals.

Contribution Amounts (Membership Sign-Up)

'Amount' information has been saved.

Contribution Links:

Title Amounts Memberships Receipt Tell a Friend Profiles Premiums Widgets Personal Campaigns

Use this form to enable and configure a Membership Signup and Renewal section for this Online Contribution Page. If you're not using this page for membership signup, leave the **Enabled** box un-checked... [\(learn more...\)](#)

Save Save and Done Cancel

☒ **Membership Section Enabled?**
Include a Membership Signup section in this Online Contribution page?

Title - New Membership
New Member Sign-up
Membership section title - for new member signups.

Introductory Message - New Memberships

B I U Font Size A A

Welcome! Please sign up for a New Membership.

body p

Membership section introductory text - for new member signups.

Title - Renewals
Membership Renewal
Membership section title - displayed to renewing members.

Introductory Message - Renewals

B I U Font Size A A

Please renew your membership now.

Additional options that appear at the bottom of this screen. **Membership Types** allow you to define which memberships are available on this screen and which are available for upsell as part of renewal. If you are using this online contribution page for both membership signup and general fundraising, you can make membership signup optional for constituents who just want to donate without becoming a member. If you checked the box for "Contributions Amounts section enabled" on Amounts tab to solicit additional contributions, you can decide whether such payments are recorded separately from membership fee payments.

Introductory Message - Renewals

B I U Font Size A A

Please renew your membership now.

body p

Membership section introductory text - displayed to renewing members.

Membership Types

Include these membership types:

	Default: (unselect)	Auto-renew:
☒ General	☒	(Not Available)
☒ Student	☐	(Not Available)
☐ test	☐	(Not Available)

☒ **Require Membership Signup**
If checked, user must signup for one of the displayed membership options before continuing.

☐ **Separate Membership Payment**
Check this box if you are including both Membership Signup/Renewal AND a Contribution Amount section, AND you want the membership fee to be charged separately from any additional contribution amount.

☒ **Display Membership Fee**
Display the membership fee along with the membership name and description for each membership option?

Save Save and Done Cancel

After the site visitor completes the membership signup or renewal form, he will be redirected to a thank-you page and can have an email receipt generated and sent to him. This fourth step in the wizard allows you to configure those options.

Thank-you and Receipting (Membership Sign-Up)

[Contribution Links](#) [@](#)

[Title](#) [Amounts](#) [Memberships](#) [Receipt](#) [Tell a Friend](#) [Profiles](#) [Premiums](#) [Widgets](#) [Personal Campaigns](#)

Use this form to configure the thank-you message and receipting options. Contributors will see a confirmation and thank-you page after whenever an online contribution is successfully processed. You provide the content and layout of the thank-you section below. You also control whether an electronic receipt is automatically emailed to each contributor - and can add a custom message to that receipt.

[Save](#) [Save and Done](#) [Cancel](#)

Thank-you Page Title *
 This title will be displayed at the top of the thank-you / transaction confirmation page.

Thank-you Message

B I U Font

Source

Enter text (and optional HTML layout tags) for the thank-you message that will appear at the top of the confirmation page.

Thank-you Page Footer

B I U Font

Source

Enter link(s) and/or text that you want to appear at the bottom of the thank-you page. You can use this content area to encourage contributors to visit a tell-a-friend page or take some other action.

☒ **Email Receipt to Contributor?**
 Check this box if you want an electronic receipt to be sent automatically.

Receipt From Name
 Enter the FROM name to be used when receipts are emailed to contributors.

Receipt From Email*
 Enter the FROM email address to be used when receipts are emailed to contributors.

Receipt Message

Enter a message you want included at the beginning of emailed receipts. NOTE: This text will be included in both TEXT and HTML versions of receipt emails so we do not recommend including HTML tags / formatting here.

CC Receipt To
 If you want member(s) of your organization to receive a carbon copy of each emailed receipt, enter one or more email addresses here. Multiple email addresses should be separated by a comma (e.g. jane@example.org, paula@example.org).

BCC Receipt To
 If you want member(s) of your organization to receive a BLIND carbon copy of each emailed receipt, enter one or more email addresses here. Multiple email addresses should be separated by a comma (e.g. jane@example.org, paula@example.org).

[Save](#) [Save and Done](#) [Cancel](#)

CiviCRM allows you to add a tell-a-friend feature to the thank-you page. The page lets your members share details about your organization with their friends by emailing them a link and information.

Thank-you and Receipting (Membership Sign-Up)

Contribution Links

TitleAmountsMembershipsReceiptTell a FriendProfilesPremiumsWidgetsPersonal Campaigns

Tell a Friend gives your contributors an easy way to spread the word about this fundraising campaign. The contribution thank-you page will include a link to a form where they can enter their friends' email addresses, along with a personalized message. CiviCRM will record these solicitation activities, and will add the friends to your database.

Save

Save and Done

Cancel

☒ Tell a Friend enabled?

Title *

Tell a Friend

Introduction

Help us spread the word and leverage the power of your contribution by telling your friends. Use the space below to personalize your email message - let your friends know why you support us. Then fill in the name(s) and email address(es).
This message is displayed to the contributor at the top of the Tell a Friend form. You may include HTML tags to add formatting or links.

Suggested Message

Thought you might be interested in learning about and helping this organization. I think they do important work.
Provides the contributor with suggested text for their personalized message to their friends.

Info Page Link

A link to this Online Contribution page is automatically included in the email sent to friends. If you ALSO want to include a link providing general information about your organization, enter that link here (e.g <http://www.example.org/>)

Thank-you Title *

Thanks for Spreading the Word

Thank-you Message

Thanks for telling your friends about us and supporting our efforts. Together we can make a difference.
Your message thanking the contributor for helping to spread the word. You may include HTML tags to add formatting or links.

Save

Save and Done

Cancel

COLLECTING INFORMATION AS PART OF MEMBERSHIP SIGN UP

PROFILES ARE CENTRAL TO CIVICRM'S INTERFACES WITH WEBSITE VISITORS. A PROFILE IS A COLLECTION OF DATA FIELDS THAT CIVICRM DISPLAYS TO OBTAIN INFORMATION FROM VISITORS OR DISPLAY DATA TO THEM. IF YOU ARE NOT FAMILIAR WITH THE CREATION AND FUNCTION OF PROFILE SETS YOU SHOULD READ MORE ABOUT IT IN THE PROFILES CHAPTER OF THE CONFIGURATION SECTION IN THIS BOOK.

Profiles are critical to the functioning of membership signup and renewal pages. By default, contribution pages will include only an email field (which the member is required to fill in), in addition to the membership and contribution amount fields. Organizations almost always want to collect additional contact information as part of the membership signup process. Profiles provide these extra fields. On this step of the contribution page wizard, you may select one or more existing profiles for inclusion on the form.

If you haven't yet defined a profile with the fields whose information you want to collect, simply proceed to the next step of the wizard. Save your work on the Contribution page, define the Profile you want, and come back to the Contribution page to assign the profile.

Thank-you and Receipting (Membership Sign-Up)

Contribution Links

TitleAmountsMembershipsReceiptTell a FriendProfilesPremiumsWidgetsPersonal Campaigns

You may want to collect information from contributors beyond what is required to make a contribution. For example, you may want to inquire about volunteer availability and skills. Add any number of fields to your contribution form by selecting CiviCRM Profiles (collections of fields) to include at the beginning of the page, and/or at the bottom.

You can use existing CiviCRM Profiles on your page - OR create profile(s) specifically for use in Online Contribution pages. Go to [Administer CiviCRM Profiles](#) if you need to review, modify or create profiles (you can come back at any time to select or update the Profile(s) used for this page).

Save

Save and Done

Cancel

Include Profile (top of page)

Name and Address

Include additional fields in this online contribution page by configuring and selecting a CiviCRM Profile to be included above the billing information (but after the introductory message, amounts, and honoree section).

Include Profile (bottom of page)

- select -

Include additional fields in this online contribution page by configuring and selecting a CiviCRM Profile to be included at the bottom of the page.

Save

Save and Done

Cancel

Premiums tab

Premiums are thank you gifts and incentives offered to organization contributors. They are most commonly associated with tiered donation levels, though they could be created for use with memberships. Before including premiums on a contribution page, you must configure them through **Contributions > Premiums (Thank-you Gifts)**.

The Premiums tab of the contribution page wizard controls the introductory text, contact information, and other premium-related details.

173

Thank-you and Receipting (Membership Sign-Up)

Contribution Links ▾

Title Amounts Memberships Receipt Tell a Friend Profiles Premiums Widgets Personal Campaigns

Edit **Premiums Settings** to customize the title and introductory message (e.g. ...in appreciation of your support, you will be able to select from a number of exciting thank-you gifts...). You can optionally provide a contact email address and/or phone number for inquiries. Then select and review the premiums that you want to offer on this contribution page.

Save Save and Done Cancel

Premiums Section ☒ Enabled? Is the Premiums section enabled for this Online Contributions page?

► Premiums Settings

The premiums listed below are currently offered on this Contribution Page. If you have other premiums which are not already being offered on this page, you will see a link below to offer another premium. Use [Administer CiviCRM > Manage Premiums](#) to create or enable additional premium choices which can be used on any Contribution page.

Name	SKU	Market Value	Min Contribution	Weight	
Coffee Mug	MUG-101	12.50	5.00	1	Edit Preview Remove

Save Save and Done Cancel

Contribution widgets is used for displaying fundraising goals, so Widgets are usually *not* used for membership pages. Personal Campaign Pages are geared toward obtaining help from visitors toward fundraising efforts, so Personal Campaign pages are usually *not* used for membership pages.

TEST DRIVE YOUR MEMBERSHIP SIGN-UP/RENEWAL PAGE

Once you finish configuring and setting up the details of your event, you are well advised to test drive the event to make sure all the pieces of the event process are working according to your expectations: **Contributions > Manage Contribution Pages > click Links** next to your membership sign-up/renewal page > click **Test-drive**.

You may want to test the following:

- Do the description of the event, dates, cost of the event, etc., make sense and match your organisation's plans?
- Are the messages that confirm the registration clear?
- Did you receive the email message that confirms and thanks you for registering?
- If it's a paid event, did payment processing work?

Test the event through the eyes of a person who is registering for the event, to make sure the flow of the registration process guides the person effortlessly each step of the way. After initial testing, if you send your invitation email to a person in the organisation that hasn't been directly involved in the the configuration of the event, you can get a fresh point of view that represents what your contacts will feel during the process.

When using the Test-drive Registration option, you see the same registration pages as a regular user, but the online payment isn't really debited from your card (and you can enter a fake one).

PUBLISHING YOUR MEMBERSHIP SIGN-UP/RENEWAL PAGE

After completing the contribution page wizard, return to the listing of Contribution pages, where you will find the page you've just created: **Contributions > Manage Contribution Pages**. You can now view the page, test the functionality, or return to the configuration options and make adjustments.

At this point you've completed the Contribution page but have not made it visible or available to website visitors. Depending on the environment in which CiviCRM is operating, this will be accomplished in different ways.

- **Drupal:** **Contributions > Manage Contribution Pages > click Links** next to your membership sign-up/renewal page > click **Live Page** to view the finished page. You can then copy the URL and include it in a content page or assign it to a menu item.
- **Joomla!**: The most direct way to expose your membership signup/renewal page to the front of your website is by:

1. creating a menu item. Navigate to a menu and create a new CiviCRM item.
2. From the list of menu options, choose Contributions.
3. In the basic parameters section, select the contribution page you would like exposed from the dropdown menu.
4. Save the menu item and view the website to confirm the page's functionality.

38. EVERYDAY TASKS

This chapter will describe some of the everyday tasks to help you create, edit, renew, and manage your memberships.

MANAGING MEMBERSHIPS

To see a summary of the status of your memberships over recent months, as well as a details about these memberships, you can use the membership dashboard or view the membership in an individual's contact record.

The Membership Dashboard

To see a quick snapshot of your recent memberships, use the membership dashboard: **Memberships > Dashboard**. This screen contains two blocks of information that display a summary of your recent memberships, categorised by type and date range, and a list of recent member activity.

CiviMember

Membership Summary ⓘ

Members by Type	July – (Last Month)			August (MTD)			2011 (YTD)			Current #
	New	Renew	Total	New	Renew	Total	New	Renew	Total	
General	5	0	5 [5]	6	0	6 [6]	11	0	11 [11]	12 [12]
Student	3	0	3 [3]	8	0	8 [8]	11	0	11 [11]	11 [11]
Lifetime	1	0	1 [1]	1	0	1 [1]	2	0	2 [2]	2 [2]
Totals (all types)	9	0	9 [9]	15	0	15 [15]	24	0	24 [24]	25 [25]

Primary member counts (those who "own" the membership rather than receiving via relationship) are in [brackets].

All of the summary numbers are hot-linked. Simply click on a number to drill down and view a list of members who have joined or renewed over the last two months or the year-to-date, or who are considered current according to the membership status definitions. From this list of members, you can perform additional actions with the memberships, such as Delete, Edit, Export, Send Email to Contacts.

Viewing An Individual's Membership Records

Another way to view membership records is by viewing an specific individual's record and looking at the Membership tab:

- After finding the contact you wish to manage, click the "Membership" tab to view a summary of the contact's membership records.

Summary

Contributions 1

Memberships 1

Events 2

Activities 8

Cases 0

Relationships 4

Groups 1

Notes 1

Tags 1

Change Log 0

Voter Info 0

Grassroots Info 0

School Information 0

Click [Add Membership](#) to record a new membership. Click [Submit Credit Card Membership](#) to process a Membership on behalf of the member using their credit card.

Add Membership

Submit Credit Card Membership

Active Memberships

Membership

Start Date

End Date

Status

Source

General	April 12th, 2010	April 12th, 2012	New	Payment	View Edit more
---------	------------------	------------------	-----	---------	----------------

Renew

Renew-Credit Card

Delete

CivCRM ID: 92

Powered by CivCRM 27176. CivCRM is openly available under the [GNU Affero General Public License \(GNU AGPL\)](#).
[Download source.](#) [View issues and report bugs.](#) [Online documentation.](#)

Membership records appear in a list with active memberships (those with a current status) first and followed by expired or canceled memberships.

You can edit existing membership records, renew a membership, or create a new membership record. If you have configured an online credit card payment processor for use in CivCRM, you will see two options for creating or renewing a membership: one for handling an offline record (no real-time transaction taking place), and one for handling an online record (using a real-time credit card transaction). The interface for each process is very similar, except that the credit card option includes payment processing and recording options.

CREATING A NEW MEMBERSHIP

To create a new membership record, you can:

- Find the contact, then click on the **Membership tab > Add New Membership**, then fill out the "New Membership" form, OR
- Click **Memberships > New Membership**, then select the contact or create a new contact who will be getting the membership, then fill out the "New Member" form

Mr. Regina Porter

New Membership

Save

Save and New

Cancel

Member

Mr. Regina Porter

Membership Organization and Type

Inner City Arts - select -

Source

Source of this membership. This value is searchable.

Campaign

- select -

Member Since

08/26/2011

(clear)

Start Date

When did this contact first become a member?

(clear)

End Date

First day of current continuous membership period. Start Date will be automatically set based on Membership Type if you don't select a date.

(clear)

Status Override?

Record Membership Payment?

Check this box to enter or update payment information. You will also be able to generate a customized receipt.

Send Confirmation and Receipt?

Automatically email a membership confirmation and receipt to regina.porter@example.com?

Save

Save and New

Cancel

Many of the fields on this page will be auto-completed if left blank. Fields include:

- **Membership Organization and Type:** select the name of the organization that the contact has a membership with and the type of membership.
- **Source:** The system will complete details regarding the record, including whether it was an offline or online transaction and who completed the record. Status Override
- **Campaign:** if the membership is connected with a larger campaign, select the name of the campaign. To learn more, see the section on "Campaigns".
- **Member Since:** The date the membership record was created will be auto-filled, but you can edit this date with the actual date that the member joined.
- **Start Date:** If the membership type is a rolling membership, the current date will be auto-filled. If the membership type is a fixed period, CiviCRM will determine the appropriate start date based on the membership type configuration.
- **End Date:** This field is automatically calculated from the start date and filled in based on the membership type settings.
- **Status Override?:** check this box to manually define a status for the membership record. As indicated by the title, it overrides the status automatically provided. You should use caution with this field as setting it will disable the automated status function for the record.
- **Record Membership Payment?:** By checking the box and completing the transaction fields displayed, you are creating two associated records: a membership record and a contribution record. After recording the membership, you will be able to view the membership record and see the related contribution record at the bottom.

Need screenshot

- **Send Confirmation and Receipt?:** check this box to send an email to the contact that their membership is confirmed

RENEWING MEMBERSHIPS

Naturally, you expect your constituents not only to join your organization, but to maintain their membership on an ongoing basis through renewals. CiviCRM facilitates the renewal process: **Search for the contact > click on the "Membership" tab > click MORE next to the membership record to renew > Renew.**

Find Members

» Edit Search Criteria

30 Results

Primary AND Related Members

Select Records: ☐ All 30 records ☐ Selected records only

Print actions - Go

	Name	Type	Member Since	Start Date	End Date	Source	Status	Auto-renew?	
	Parker, Franklin	General	August 18th, 2011	August 18th, 2011	August 17th, 2013	Check	New		View Edit more
	Grant, Peter	Student	August 17th, 2011	August 17th, 2011	August 16th, 2012	Check	New		
	Zope, Raymond	General	August 16th, 2011	August 16th, 2011	August 15th, 2013	Donation	New		
	Jameson, Chetan	Student	August 15th, 2011	August 15th, 2011	August 14th, 2012	Donation	New		
	Yadav, Brzeczysław	Student	August 13th, 2011	August 13th, 2011	August 12th, 2012	Check	New		View Edit more

Delete

Renew

Renew Membership

BATCH UPDATING MEMBERSHIPS

You can batch update membership records by selecting **Memberships > Find Members >** enter your criteria and from the "Find Members" results screen, select the membership records and click **Batch update**. You'll need to

CANCELING, EXPIRING AND DELETING MEMBERSHIPS

If a contact wants to resign or cancel their membership, rather than deleting their membership, you should change the status to cancelled or another status that is not considered current. This ensures that you keep a historical record on the contacts interaction with your organisation.

You may want to delete a membership record if you accidently created a membership for the wrong contact. The contact is not deleted, only the membership record is deleted. This action cannot be undone.

You can delete membership records by:

- Searching for a particular contact, then click on the "Membership" tab > click **More** next to the membership record > click **Delete**, OR
- Click on **Memberships > Find Members** > enter your criteria and from the "Find Members" results screen, select the membership records and click **Delete**.

EXPORTING MEMBERSHIP RECORDS

You may decide to export membership records so that you can do more analysis, perform document mail merges, or create a specific type of report outside of CiviCRM. Exporting membership records allows you to select a default set of primary fields or choose fields that are specific to the membership record for export.

To export membership records:

- Click on **Memberships > Find Members** > enter your criteria,
- then on the "Find Members" search results screen, select the records you want to import and in **-actions-** drop down, select **Export Members**.

SENDING EMAIL TO MEMBERS

After searching your records, you may want to send an email to selected contacts and include data field tokens to personalize the email message. To learn more about emailing and tokens in CiviCRM, see the section called "Email".

To send email to members:

- Click on **Memberships > Find Members** > enter your criteria,
- then on the "Find Members" search results screen, select the records you want to import and in **-actions-** drop down, select **Send Email to Contacts**.

39. REPORTS AND ANALYSIS

There are a number of techniques for reporting on and analysing your memberships. The membership dashboard gives a quick overview of your current membership, with rows for each membership type and columns that current totals, and year and month to date figures.

□

That's a good start but there are a couple of ways that you can create more detailed and customised analysis using CiviCRM's search features and CiviReport.

If you are interested in the financial aspects of membership, you may also find the reports and analysis chapter in contributions useful.

MEMBERSHIP REPORTS

Out of the box, CiviCRM comes with three membership reports designed to tell you something specific about your membership.

The **membership report (detail)** shows a line for each member. The **membership report (summary)** shows members grouped by any criteria you specify. For example, you can look at the amount of members that have joined each year for the last 10 years or show members broken down by country of origin or any other custom data that you collect on them. Clicking on any row in the summary report will take you to the a corresponding detail report for that row. The **membership report (lapsed)** provides a list of memberships that lapsed or will lapse before the date you specify.

SEARCHING BASED ON MEMBERSHIP DATA

CiviCRM makes an important distinction between contacts and memberships, which is blurred when we talking about 'members'. Consider the following question: 'How many members do we have?' This could be taken to mean 'how many contacts do we have that are members?', or 'how many memberships have we granted to contacts?'. The answer to these questions is often be the same but what happens if one of your contacts has more than one membership? The answer is that you'll have two memberships but only one contact.

There's no right or wrong answer to the question should we look at contacts or memberships. It just depends on what you are interested in. It is important to take this into consideration when carrying out a search.

The **Find members** search allows you to search based on membership data and return membership data. The **Advanced search** allows you to search based on some limited membership information (and combine that with other contact information) and return contacts. You can also choose membership from the **Display Results As** column to show members rather than contacts.

Searching based on criteria gives you access to simple totals and also the option to export as CSV for further analysis.

FURTHER ANALYSIS

If CiviReport and the contact and membership searches aren't giving you want you want, consider commissioning a new report or custom search. Read the CiviReport section and the 'Search and actions' chapter for more information.

EMAIL

40. WHAT IS CIVIMAIL

41. WHAT YOU NEED TO KNOW

42. SET UP

43. EVERYDAY TASKS

44. REPORTS AND ANALYSIS

40. WHAT IS CIVIMAIL

The CiviMail component extends CiviCRM's core email functionality with sophisticated tools for handling mass email campaigns. It can reliably deliver a high volume of email and provide detailed reports on the results and effectiveness of those emails. CiviMail is often used to complement other CiviCRM components, for example to send emails to non members to encourage them to become members or to send emails to people that are yet to register for an event.

CiviCRM's mail features, including CiviMail, interact with your mail server software. Configuring the mail server and CiviMail are system administrator tasks, which may require professional assistance. You will also need to verify with your web hosting provider whether they meet the configuration requirements, and verify that they don't put limits you might exceed on the number of emails you can send per day.

SCENARIO: PEACE CENTRE

St Eglantina's Centre for Peace and Reconciliation use CiviEvent to run a yearly event programme on a number of different themes. They have set up a mailing list page where people can sign up to be informed of all events only events that interest them. They then use CiviMail to send out emails to those people based on those events. When someone unsubscribes from an event theme mailing list, CiviCRM keeps a record of the fact that they have unsubscribed.

St Eglantina's also automatically subscribe anyone who has been to an event on a specific theme to receive emails about that theme. They don't have to worry about spamming people that have unsubscribed from a thematic event mailing list, as CiviCRM will remember that they have unsubscribed and not re-subscribe them.

From time to time, St. Eglantina's send out other emails to a mailing list that includes nearly all contacts on their database with personal messages from the centre director highlighting particular issues. Often two similar versions of the same email are sent to different groups in their database to test which message formats are more effective. They can do this by sending the email to half the contacts in a particular group and then sending another email which excludes contacts that have already received the first email.

SCENARIO: MOBILISING WITH EMAIL

The Townsville Organisation For Tenants (TOFT) held a survey and petition to gather data and support for the campaign Demand Affordable Public Housing. The survey was undertaken by volunteers visiting selected constituents in their homes while the petition was widely promoted to the public who could sign and answer questions online.

In the early stages of the campaign, the TOFT volunteer coordinator searched for contacts in the group Volunteers and used the Send email action to send a general email asking for volunteers to help with the survey. From those who responded that they were available, a small group were trained to carry out the home visits and record survey responses.

Once the online petition had been created using tools in CiviCampaign, the TOFT communications officer created an email including text, images and links to promote the campaign and encourage people to click through to the site and complete the online petition. This email was then sent out to the entire database using CiviMail, including a forwarding link so that recipients could easily distribute the email widely through their own networks.

CiviMail enabled TOFT to track responses to this mass emailing; reports were generated showing that 89% of recipients clicked through to sign the petition, and 75% forwarded it on to others. This data was then compared with previous offline petition and survey efforts to demonstrate the increased reach of the campaign through using CiviCRM.

41. WHAT YOU NEED TO KNOW

This chapter outlines some key concepts and questions that are useful for planning the use of CiviCRM's email capabilities. This chapter should be read before you start sending emails to contacts.

KEY CONCEPTS

As you might expect for a web-based CRM, email plays a central role in CiviCRM. Broadly speaking, there are three situations in which email is sent from CiviCRM:

- as part of workflows that happen in other components, for example, an event registration confirmation email
- to individuals and small groups of people (via the Send email action)
- as a mass mailing via CiviMail.

A substantial part of this section deals with CiviMail, but it will also be useful if you are using other components of CiviCRM that interact with email without enabling CiviMail.

Every email sent, via the Send email action or using CiviMail, is treated as an activity and stored in the activity history of each recipient so you can see, for example, that John Doe made a donation three days after he received your April newsletter.

Send email and CiviMail

When the CiviMail component is enabled, CiviCRM offers two options for sending email to contacts:

- send an email as an activity for a contact: this is suitable for sending emails to individuals and small groups
- send a Mailing to a group using CiviMail: this is ideal for mass mailings or scheduled emails to small groups.

There are crucial differences between the Send email action and the CiviMail component:

- emails sent via the Send email action are limited to a maximum of 50 email addresses, and there is no reporting other than an activity record for each recipient
- CiviMail emails have sophisticated bounce processing and reporting
- CiviMail allows recipients to manage their own subscriptions
- CiviMail can be configured to automatically track replies.

CiviMail requires more work to configure and there are more steps involved in sending each email than using the core email functionality within CiviCRM; however, once you have enabled and configured CiviMail you will have greatly enhanced mass email capabilities.

Working out which method to use for each email might not be immediately apparent. Over time, the best practices and the right tool for each situation will become more obvious and can be shared among your users.

When to use the Send email action

The advantage of sending emails to your contacts via CiviCRM is that each email is recorded as an activity with a contact, allowing other staff members to easily determine whether a contact was sent a particular message. It is also a quicker option than setting up a mass mailing as long as you are contacting fewer than 50 recipients.

The Send email activity offers all the functionality of an email client: you can attach files, CC and BCC contacts, and use message templates. This option is available even when the CiviMail component is disabled.

Note that CiviCRM is not suitable for conducting extended email exchanges. For those, you need to use your regular email client. If you want to record the fact that you had an email exchange with somebody, you could create an activity called Email Exchange and copy and paste your email conversation in the body as you would a record of a telephone call. You can also use the Autofiling outbound email option described below.

You can record this Send an email activity for multiple contacts at one time. However, it is recommended that you use CiviMail's Scheduled Mailing tool if you want to message more than about 50 contacts to avoid having your email marked as spam.

When to use CiviMail Mailings

Mass mailings to groups of contacts should always be sent using the Mailings tool provided by the CiviMail component. This will enable you capture statistics about the success of your mailing, including bounce statistics and click-throughs. CiviMail will also ensure that a mailing to a large group does not overwhelm your email server, and lets you set up a specific automatic response to each mailing.

Choosing recipients

Both methods of sending email have two options for choosing recipients: one from the tool's interface and the other based on search results.

- Sending an email as an activity allows you to choose recipients after you start the mailing, as you would in a regular email client. You can choose direct recipients and recipients marked as CC or BCC. It is also possible to send email to recipients chosen based on search results, as long as there are fewer than 50.
- Mass mailings can only be sent to groups marked as Mailing Lists, which must be created prior to sending an email. (Read more in the Tags & Groups chapter). It is possible to send a mass Mailing to contacts based on search results, but CiviCRM will create a special group for each such mailing.

Tokens and personalisation

Tokens can be used to insert personalised text, such as a person's name, into an email. Tokens are placeholders that CiviCRM recognizes and replaces with an appropriate value when sending each message. The list of tokens available to you will include tokens for custom data fields that you may have created for individual data, such as gender or ethnicity. Note that not all tokens available in CiviMail are also available in the Send email activity.

You can include a direct link to the person's contact dashboard so that they can review their registration details after logging in, or you can use the checksum token to allow them to edit a specific profile or submit a contribution without logging in.

See more details about Tokens in the **Tokens and Mail Merge** chapter in the **Working with Your Data** section.

From Email addresses

Both mass and regular email can be sent from your personal address, from a general email address associated with your organisation, or from another person's address. For example, an assistant can send official email messages under the name of his manager.

Headers & Footers

In mass mailings only, you can include customised headers and footers. You can configure custom headers and footers under **Administer > CiviMail > Headers, Footers, and Automated Messages**.

Unsubscribing

CiviCRM requires that you allow recipients to unsubscribe from any mailing list *and* opt out of ever getting email from you. See the chapter on Set-up to learn how to easily include an unsubscribe link in each mailing.

Templates

Templates for emails or parts of emails help to streamline your communications by reusing entire emails or parts of emails such as headers and footers. Email templates can be created either beforehand or when you send an email, and edited at any time.

Reporting

CiviMail can track mass mailings, providing useful information to help you understand the areas your recipients are interested in and gauge the effectiveness of your communications. You can track how many recipients opened the email and which links in the email were popular.

A word of warning about email opening statistics: CiviMail tracks the opening of a message by inserting an invisible image in the body of the email. The majority of email clients have the display of images disabled by default and unless the user chooses to display images, their email will not be recorded as opened. You will therefore definitely have more readers than the number reported. In our experience, a 30% reported opening rate can be considered good. This is obviously different for each organisation and each group you send emails to.

Don't focus too much on the absolute numbers, but rather use them as a way of comparing different mailings you send. You might want to use them to experiment with different layouts, writing styles, and lengths and see what works best for your constituents.

Autofiling external emails in CiviCRM

CiviCRM lets you file email sent via your email client against contacts in your database. You need to set up a special email address that you include in the BCC field of an email you are sending. This will be read by the database and converted into an activity. This activity gets filed in the record of the contact that matches the email address. If that email address does not exist in your database a new contact record will be created. See the **Set-up** chapter for details.

KEY QUESTIONS

- For a given message, do you need to send it to more than 50 contacts?
- Does your organisation send out regular email newsletters?
- Have you created a list (a Group or Smart Group) to which to send your email?
- Do you want to know who is opening your email and clicking on links in it?
- Will you want to track replies to your mass mailing?
- Do you want recipients to be able to view your mailing in a browser window if they have trouble viewing it from their email browser?
- Who should be the sender of the email? This could be a generic organisation address, or personalised with someone's name.
- Is there content you'd like to include in the header and/or footer in every mailing?
- Would you like to allow people to sign up for your newsletter online?
- Would it be useful to create standardized email templates that can be used again and again for newsletters and the like?

Other Considerations

Many CiviCRM components interact with email functionality and with CiviMail, for example to send confirmation, thank-you and receipting emails. The sections of this book relating to each component will include some information about customising these emails, and should be read in conjunction with this section in order to give you a full understanding of how email works in the broader context of CiviCRM.

Privacy Issues

We encourage you to consider privacy issues. Different countries have different laws relating to email privacy, including opt out/unsubscribe options. There may also be issues related to CiviMail's tracking tools; for instance, you may wish to avoid tracking who has clicked on the "how to deal with drug issues" link on a specific mailing.

42. SET UP

This chapter describes how to set up information such as from email addresses, mailing groups and email templates. It assumes that the basic functionality necessary for your server to send and process emails in the first place has already been configured. See "System Configuration" for details.

CONFIGURING THE DOMAIN INFORMATION

Your domain information is basic information about your organization: name, a short description, your email address and your physical postal address. CiviMail requires that you include the sender's physical address along with unsubscribe/optout links in any mass mailing you send, in order to comply with privacy laws in many countries. This information is made available via tokens and must be included in any mail sent with CiviMail.

To configure the domain information, go to: **Administer > Configure > Domain Information**.

MAILING GROUPS

CiviMail uses Groups to draw in recipients of mass mailings. To create a group, go to: **Contacts > New Group**. When you create and configure a Group for this purpose, make sure to check Mailing List so that it is available as a Mailing List in CiviMail.

You can also create Smart Groups based on search results. For example, based on the results of Advanced Search you can create a Smart Group of contacts who have active memberships, or a Smart Group of contacts in a given city. The Smart Group membership will always match the search criteria at any given moment. This makes it possible to send mailings without having to first update the contacts in a group.

To create a **Smart Group**:

1. Go to **Advanced Search** or **Find Contact** and run a search query based on the criteria for your group.
2. On the search results page, click the radio button that selects all the records.
3. Click on - **more actions** -, select New Smart Group and then click Go.
4. The next screen provides a review of the criteria chosen for the Smart Group. Give the Smart Group a name and (optionally) a description, and make the Smart Group a Mailing List.
5. Click Save Smart Group.

Note: You can also create a Smart Group based on a Participant search. However, the Smart Group save page will not offer you the option to make this group a Mailing List. To make this Smart Group available to CiviMail, you must change its settings through Contacts > Manage Groups. This same thing happens if you use the Advanced Search and choose Event Participants under "Display results as" .

You cannot create smart groups based on Membership, Contributions or Pledge searches. This apply to results of an Advanced Search if the "Display results as" option is set to anything but Contacts.

ALLOW PEOPLE TO SIGN UP FOR YOUR MAILING LISTS ONLINE

CiviCRM makes it possible for people to sign themselves up to mailing lists online. To do this, you must designate the group as a mailing list.

Click **Contacts > Manage Groups**. Click **Settings** on the group that holds your mailing list recipients and check Mailing List. You must also change the Visibility to Public Pages.

This will be any Group of the Mailing List type with visibility set to Public Pages. For this to work for users who don't have a log-in to your CiviCRM, you must ensure that anonymous users in Drupal have the following permission checked: "Access CiviMail subscribe/unsubscribe pages".

You and anyone who accesses the following link can subscribe to these mailing list groups: www.yourdomain.org/civicrm/mailling/subscribe. This is one way that users can subscribe to an email list online.

After people subscribe to groups on this page, they will be sent an email asking them to confirm their subscription and their details will appear in CiviCRM with their group subscription set to Pending. When they click the confirmation link in the email, their group subscription will be set to Added. **Note:** When users subscribe to multiple groups at once, an confirmation email is sent for each group separately.

Alternately, you can collect more information while people sign up to your mailing lists with the use of profiles.

To do this, you must designate each group that you want people to be able to sign up for as a mailing list.

Click **Contacts > Manage Groups**. Click **Settings** on the group that holds your mailing list recipients and check Mailing List. You must also change the Visibility to Public Pages.

You must then set up a profile. For additional information on how to do this, see the Profiles chapter.

For example, you could create a new profile called Newsletter Sign-up. Add the fields to this profile that you'd like website visitors who want to join your mailing list to fill out. Each of the fields in the profile must have a Visibility of Public Pages. For example, you may want to collect First Name, Last Name, and zip code or post code. For each of these fields, you must decide what information you require and what is optional.

At the very least, this profile must include an email field that has the Required? checkbox checked. This is so that an email can be sent to the person to confirm that they wanted to sign up for the mailing list. Until they confirm, they will have a status of "Pending" in the mailing list group.

You must add a field for the mailing lists groups that you want them to be able to sign up for. Do the following:

Click **Add Field**. For Field Name, select Contacts. When the possible selections load in the second field, select Group(s). In Field Label, you can leave "Group(s)" or you may want to change it to something more intuitive to your website visitors such as "Newsletter Sign-up". Visibility for this field must also be set to Public Pages.

To allow people to actually use this form, you can either share a link directly or embed this set of fields in your website as a form. Return to the listing of profiles and click **More** to the far right of your profile. Click Use Profile-Create Mode. The link you want will appear in a new window or tab. You can this link to allow users to sign up for your mailing lists.

Alternately, you can embed this set of fields as a form in your website. Navigate to **Profiles** from the Administration menu and click **More**. Select **HTML Form Snippet**. Copy and paste the contents of the window that appears into a page on your website. Website visitors will be able to sign up to your website on this page.

Creating and maintaining message templates

The easiest way to create a new message template is to check the "Save as New Template" on the message creation screen. This is available both when using "Send an email" as activity and sending a mass mailing.

You can create message templates from scratch or edit existing templates by going to **Administer > Configure > Message Templates** OR **Administer > CiviMail > Message Templates**.

1. Click on New Message Template.
2. Enter a Message Title and a Message Subject. You can choose to use tokens to personalize your subject line.
3. Scroll down to the HTML Message section and create your template. There are online resources that offer instructions on creating an HTML Email Template. One suggestion is to find and copy an Email Template from a website that offers samples.
4. One of the toolbar buttons at the top of this section lets you view the source code of your template. When you click on it, the template changes the view to show the HTML code that is being used. If you want to use HTML from a template you found externally, you need to switch to this view in order to paste in HTML code from the template. Make structural changes in your template in this mode as well.

Message templates are available even when CiviMail is disabled.

Tips for creating templates

HTML code allowed in emails is more restricted than HTML used for web pages. For instance, it needs to use tables for layout, inline CSS and must not include background images. Here are some tips for creating a template that will look good in all mail clients:

- **Table border:** The HTML `<table>` element includes an optional border attribute. Since the default value is 0, it doesn't appear unless you choose to use it. Adding it (or editing it if it is available) and setting it to 1 (e.g., `<table border="1">`) allows you to see the edges of your table and helps identify potential places to fix problems. Please note that HTML email templates usually have multiple tables and nested tables (tables inside tables). Make changes one at a time and switch to the HTML view to see the results. A table usually has more than one parameter, so make sure to place spaces between parameters.
- **Table cellpadding and cellspacing:** these table parameters are very useful when trying to improve the readability of your email. Play with these settings in different tables and see what works for you.
- **Width:** Do not send an email that is wider than 600 pixels, to ensure maximum compatibility across email clients. Make sure your outermost table does not exceed 600 pixels. Do the same for any other tables inside your main table. Also make sure that the total width of each image does not exceed 600 pixels. Images have a width parameter, but they can also have a horizontal padding parameter that, if set, can increase the width of the image.
- **Images:** these need to be online and accessible in order for you to use them. First edit your image so that its width and height is appropriate for your email template. Next save it so that its file size is as small as possible. If you do not have image editing software, or do not know how to use it, there are free online resources that can help you resize your image.

CREATING HEADERS AND FOOTERS

Headers and footers are only available for mass mailings using CiviMail. This functionality is only available when CiviMail is enabled.

The mail header is the area at the top of the email, which should include elements that you want to be always displayed before the main content body, such as the logo of your organization and the title of the newsletter.

The default footer, which is always the last thing in the email. The footer is an ideal place for the compulsory unsubscribe tokens.

You can manage headers and footers in **Administer > CiviMail > Headers, Footers, and Automated Messages**. Style them to present a coherent visual identity across all your messages. Both should be configured for maximum flexibility. For example, one or more headers can be created with different images and titles that can be used for different campaigns or programs.

After headers and footers are configured, staff who prepare a new mailing will be able to select them from available headers and footers. This helps staff create more standardized mailings with elements that help your readers identify the contents of the mailing or find information.

TESTING TEMPLATES

Once your templates are ready, we strongly recommend that you test them in various email clients, such as Mozilla Thunderbird, MS Outlook, Mac Mail and web-based e-mail such as Gmail, Yahoo and Hotmail. You can create a group that includes a test contact for each of those destinations and use it each time you create a new mailing.

Because email clients can display the HTML in email very differently, we recommended that you keep the HTML as simple as possible and use only inline CSS or tables for formatting. Include as much of the layout as possible in the templates so that each new mailing will not require too much reviewing, the template having already been tested.

PLAIN TEXT AND HTML FORMAT

All messages can be sent either in plain text or in HTML. Today the vast majority of people can read messages received in HTML. However, the best practice is to offer the option to send a Plain text email version to ensure all recipients can view the message. Plain text email readers may display HTML email as blank. HTML email may also present accessibility issues to people using screen readers.

However, there is a danger that if users modify an email based on a template that contains both Plain Text and HTML, they will forget to modify the Plain Text version of this message. This will mean that people using Plain Text only email clients will receive a different message.

The solution is to either use Plain Text emails only or to set templates without the Plain text option and ask users to create a Plain Text version before sending mailings.

To create a plain text version of a message from HTML, follow these steps:

1. Copy HTML text into the Plain Text field
2. Copy the URLs of all links in the appropriate places in the Plain Text field
3. If the HTML text contained tables, modify the layout to ensure text is readable

AUTOFILING EMAIL CONVERSATIONS IN CIVICRM

You can set up automatic filing of your inbound and outbound emails that are in your usual email program. They get filed as an activity for the contact(s) that match the email addresses in the From, To, and Cc fields. If the email address is not already in the system, a new contact record will be created.

For this, your administrator should have configured IMAP or other mail accounts and set them up in CiviMail (see Email System Configuration in Basic Setup for more details).

43. EVERYDAY TASKS

This chapter contains step-by-step instructions for performing important everyday tasks with email.

SEND AN EMAIL TO ONE PERSON (WITH CC AND BCC)

You can use CiviCRM to send an email to individuals. Using CiviCRM for this purpose is useful if you want other people at your organisation to see the email or if you want to send an email based on a pre-defined template.

1. Find the person you wish to email. There are two common ways to do this:
 - Use the Quick Search box on the top left. Click inside the box and begin typing a part of the person's name or email address. Choose the person from the choices that are presented.
 - Navigate to **Search > Find Contact**. Enter part of the person's name or email address. Click Search and click on the person's name when it shows up on the search results screen.
 2. From the contact summary page, click **Actions > New Activity > Send an email**.
 3. You can add additional recipients using the CC and BCC fields.
 4. If you have templates defined, you can choose one to use for this email. Selecting a template populates the text content and HTML content fields with the message content from the particular template you have chosen. You can then edit that content. You can also update the template, either changing the original template or saving it as a new template.
- Note:** Choosing a template overwrites any text you have in the message text area and on the subject line. If you would like to add a template to an existing message, it is best to insert the template first. If you have already typed some text in the message area, copy it into a separate document before applying a template.
5. Enter a subject line for your email, or modify the subject from the selected template as necessary.
 6. If you just wish to send a Plain Text version of your email, ignore the HTML section and click on the Plain Text section. Enter your message in the box.
 7. Click **Send** to send your message.

To see the activity that was just recorded of the email sent, click the Activities tab of the contact.

SENDING A QUICK EMAIL TO LESS THAN 50 CONTACTS

In the results from a search, CiviCRM makes "Send an email" available from the actions dropdown menu. This allows you to send an email to more than one contact at a time. Sending an email this way is relatively quick but provides no options for tracking email and doesn't give contacts the option to opt out. It is bad practice to use this method for mass mailings, which is why it is limited to 50 contacts. For mass mailings, use CiviMail.

1. Click **Search > Find Contacts (Advanced Search)**. Choose your search criteria and click Search (or use any other search to find the contacts that you wish to email).
2. From the search results screen, choose some or all of the contacts and click - **actions - > Send Email to Contacts**.
3. Follow the same steps as in sending an email to one person.

Each of the recipient contacts will have this email recorded as an activity activity. An activity will also be recorded for the sender. The activity record will also list all the other message recipients. Unlike with mass mailing (see below) there is no one place where all emails sent via CiviCRM are listed.

Note: If a message is sent to multiple recipients, each recipient will only see their email address (equivalent to sending via BCC).

Because the recipients don't see who else received the email, you might want to mention

whom you are sending it to in the text of your mail (for instance: "TO: Members of the board, staff")

SENDING A MASS MAILING THROUGH CIVIMAIL

Using the Mailings functionality offered by CiviMail provides many benefits over the "Send an email" action, allowing you to track respondents to your mailing, process bounces and allow people to unsubscribe from your mailings.

There are two ways to select the recipients for your mailing.

- If you are sending mail to an existing group, go to **Mailings > New Mailing**. From this screen you can choose the groups you want to send the mailing to. You can also choose to exclude contacts who are members of another group or contacts who have received previous mailings.
- Perform a search (for example, using the advanced search) and then choose **"Schedule/Send a Mass Mailing"** from the - **actions** - drop down. You will be redirected to the New Mailing screen (step 1), where you have to name the mailing and choose an "Unsubscription group" for your mailing.

Note: Mailings sent to recipients based on a search cannot be reused or saved for editing later.

Because the mailing is using the results of a search to provide the recipient list, specifying an unsubscription group is necessary to manage unsubscriptions to this mailing. If a contact who matches your search results is already unsubscribed from the Unsubscription Group (meaning this group is listed as a past group), that contact will be removed from the recipient lists.

If a contact unsubscribes via the unsubscription link in this mailing, they will be unsubscribed from this group. If they are already in the group, then they will be removed. If the contact is not yet in this group, they will first be added and then marked as removed.

Contacts who are in the Unsubscription Group but do not match your search criteria will not be included in the mailing. If you wish to include these contacts please include the relevant group.

The process for sending the mailing then proceeds in 5 steps using 5 consecutive screens. You can move between these screens by using the **Next/Previous** buttons. You can also at any stage save your mailing by clicking on the **Save & Continue Later** button (**Note:** Mass mailings based on searches cannot be edited later).

Step 1: Select recipients

This screen contains several options:

1. **Name your mailing:** Enter a name for this mailing. Select a name that will allow you and others in your organization to clearly identify the purpose of this mailing. It is recommended that you start each name with a date (e.g. "08/15/10 monthly newsletter"). This will make it easier to include or exclude recipients of this mailing in future mailings. This name is for internal use only and will not be shown to recipients. You will be asked to enter the Subject of the email later.
2. **Mailing recipients:** In this area you can choose who will receive the mailing. Mailing recipients can be defined by a group or by a recipients to a previous mailing. You can refine your recipient list by excluding groups or recipients of a previous mailing.

For instance, you may want to resend an email only to contacts that have been added to a mailing list since the last time you an email to avoid sending the same email twice to some people. In that case, choose the same group for recipients as in the original mailing but add the mailing to the EXCLUDE Recipients of These Mailing(s) area. This will then send them message only to those member of the group who did not receive the excluded mailing.

You will see the final number of recipients on the next screen after you click on the **Next** button.

Step 2: Track and Respond

This step of the process offers options for Tracking and Responding. You can set the following options.

Tracking

1. **Track Click-throughs:** This option will keep track of how many users and which users clicked on all the links in your message. This is accomplished by redirecting all links through your server. This means that all links will be overwritten with custom links containing your domain name.

Note for HTML mail: Some phishing filters may mark links that are displayed differently in HTML code and in the text as unsafe. It is therefore best not to use something like `<a href="http://google.com">http://Google.com</a>` but rather `<a href="http://google.com">click here to go to Google</a>`.

Note for Plain Text email: If you use short, user-friendly URLs in your email, they will all be overwritten with long links containing the name of your site and a long code looking like this `http://yoursite.com/sites/all/modules/civicrm/extern/url.php?u=529&qid=29011`.

2. **Track Opens:** This option allows you to track how many people opened the email you received. However, there are limitations to the effectiveness of this method. See Set-up section for details.

Responding

1. **Track Replies:** Checking this option will send replies from the mailing's recipients to CiviCRM rather than the person specified as sender. Checking this box will open other options.
2. **Forward Replies:** This option is only visible if Track replies is checked. You will need this option if you want the email specified as sender to also receive the replies sent by recipients.
3. **Auto-respond to Replies:** This option allows you to send a specific automatic reply to anybody who replies to your mailing. You need to set up an autoresponder ahead of time in **Administer > CiviMail > Headers, Footers, and Automated Messages**.

Online Publication

This option makes it possible to make the contents of the email accessible to users as a web page. This option is only relevant if you insert the **Mailing permalink** token (`{mailing.viewUrl}`) in your message in the next step. This token generates a URL on which the message can be viewed (remember to insert the code in the appropriate HTML tags).

You have two options to specify the visibility of the mailing:

1. "public pages" will make the content of this mailing be viewable as a web page by everyone who has the permission of "view public CiviMail content"
2. "user and user admin" only means that only users that received the mailing or administrators can view the content of this email as a web page; the recipients will have to log in to be able to view the message

Step 3: Mailing Content

This section will allow you to compose content for your mailing. If you have templates defined, you can choose one to use for this email. Selecting a template populates the text content and HTML content fields with the message content from the particular template you have chosen. You can then edit that content. You can also update the template, either changing the original template or saving it as a new template.

1. As you write your content, remember that every email will be sent individually. CiviCRM offers the ability to personalize each email using tokens. See "Using tokens in emails" later in this chapter.
2. If you just wish to send a text version of your email, ignore the HTML section and click on the Plain Text section. Enter your message in the box. You can also use tokens in the text version of the message. There is also a token link at the top right of the Text box.
3. Choose a Mailing Header and Mailing Footer. You can have additional Headers and Footers defined via **Administer > CiviMail > Headers, Footers, and Automated Messages** (See Set-up for details).

Note: The message editing text area displays all text as Arial. However, the actual default is Times New Roman. You should change all text to your target font at the very end because future text edits often revert to Times New Roman.

Step 4: Test

You can test your message in one of two ways:

1. **Test mailing:** You can specify an individual email address or a test group for your test mailing. The test mailing will fill in all the Tokens and include any attachments you are planning to send

It is a good idea to test your email by sending it your yourself and viewing it in your email client to make sure it looks as you expect. If you are sending a mail with a complex layout, send it to your test group and verify it from various mail clients. It is preferable to have more than one person receive your test email and give you feedback.

2. **Preview mailing:** The preview will show you all the HTML formatting and converted tokens with your data. It will not include the attachment. It cannot be guaranteed that all email clients will display the email exactly as it is shown in this preview but it is useful to ensure things like font consistency, basic layout and color.

Step 5: Schedule or Send

This section will allow you to either send the email immediately or schedule a day and time for it to be sent. By default, CiviMail checks every 15 minutes whether an email is ready to be sent, so there can be a delay of up to 15 minutes after you request the email to be sent.

Mailings sent to large numbers of recipients are sent in batches of about 400 to avoid the emails being caught up by spam filters. Therefore the actual sending of your mass mailing can take several hours depending on your server configuration.

TRACKING SENT MASS MAILINGS

To review key statistics about the To see these statistics, click on **Mailings > Scheduled and Sent Mailings**, find your mailing, and click on

Report. This will show information about all the tracked actions including Bounces. See **Managing bounces** below.

Also, when the mass mailing is sent to recipients, an Activity "Bulk Email" is recorded under their Activities tab. To see the activity that was just recorded of the email sent, click the Activities tab of the different contacts.

MANAGING MASS MAILINGS

Mass mailings can be found in one of three areas accessible via the **Mailings** menu:

1. **Draft and Unscheduled Mailings:** As soon as you name your message in Step 1 and click Next, it is placed in this area. If you click Save and Continue Later or simply abandon a message after some steps, you can continue working on it by clicking on the "Continue" link next to the message listed here (**Note:** Mailings started based on search results will not have the Continue link listed).

You can also delete draft messages here.

2. **Scheduled and Sent Mailings:** When you send or schedule a mailing, it will be placed in this area and remain there until it is archived or deleted.

You can track the success of delivery by clicking on the **Report** link next to the message.

You can also start another mailing based on a previous mailing by clicking on the **Re-Use** link.

The **Archive** and **Delete** links are available under the **More** link.

3. **Archived Mailings:** This area lists all messages that were archived from the Scheduled and Sent mailings area. Mailings listed in here are not available to be included or excluded from the recipient list.

It provides exactly same functionality including the possibility to view Reports and Re-Use.

USING TOKENS IN EMAILS

You can use tokens to insert personalised text, such as a person's name, into a mailing sent with CiviCRM. Tokens are replaced by the appropriate value at the time the email is sent out.

For instance, if you want each email to address the person after "Dear " you would type the space and then click on the Token link at the top left of the HTML box. The popup that appears enables you to find the appropriate token. Start typing "First name" in the box and choose the token that corresponds. Click Close and you will see that your message now reads "Dear {firstname}". When the email is sent the appropriate first name will be inserted into each message.

To view the list of available contact tokens, click on the Token link. Tokens for the display name and email greeting are particularly useful.

Only contact fields and actions can be inserted in your email as tokens. Related records, such as the name of the event for which the contacts have pending enrollments, cannot be included. However, you could provide a link to the person's contact dashboard so that they can review their registration details for themselves (once logged in). You can also use a checksum token that generates a unique URL for each contact so they can modify their information without having to login.

In the HTML format editing area, tokens that generate URLs (links) need to be placed in the URL field of the Link creation screen. Otherwise, they will display as text and not a clickable link in the email client of the recipient.

See **Tokens and Mail Merge** chapter in the **Working with Your Data** section.

MANAGING BOUNCES AND CONTACTS WITH INVALID EMAILS

If your server is set up to process bounces, contacts will be marked as **On Hold** when their email bounces. Further messages to those addresses will be suppressed. You can search for emails that are on hold either from the Bounces report or with an advanced search, and then investigate why the emails are bouncing.

You should check the report of each mailing several hours after sending it to review a list of bounces by clicking on the **Bounces** link. You can see the reasons for individual bounces such as incorrect email addresses (e.g. contact@google.com), fix them and remove their On Hold status. You can then re-use the mailing and simply add it to the EXCLUDE Recipients of These Mailing(s) list on the Select Recipients screen of the re-used mailing setup.

44. REPORTS AND ANALYSIS

CiviMail has a number of tools for reporting and analysis, indeed reporting is one of the key reasons to use CiviMail.

INDIVIDUAL MAIL REPORTS

You can view a report for each individual mailing from the **scheduled and sent** mailings screen. These reports are based on live information about your data you should feel free to track your emails in real time on this screen by refreshing the page. Each mailing report is broken down into a few sections.

Delivery summary

report_email

The delivery summary shows some high level statistics about the mailing.

Intended recipients shows the number of people that the mailing was intended to be sent to. Clicking on Intended recipients will show each of the contacts.

Tracked opens shows the number of people that CiviCRM 'thinks' have opened the email. In the world of email, there is no 100% reliable way of knowing when someone has opened an email. CiviCRM uses a trick that is common amongst mass mailers - it embeds a small image with a unique name in each email. When a client views the email and downloads the image, CiviCRM knows that they have read the email. Because this technique is common, to protect people's privacy, most email clients ask users to confirm whether they want to download images in emails. Hence you'll only get an accurate picture of how many people have opened your email if they all choose to download pictures. Because this never happens in practice, tracked opens statistics should be taken as indicative, rather than accurate.

Click throughs shows the total number of times that people have clicked links in email. **Forwards** show the amount of times people have forwarded the email using the forward link which is a token that you can include in your mailing. **Replies** shows the number of times that people have replied to the email *if you have enabled reply tracking*. **Bounces** show the number of email addresses that could not be successfully delivered to *if you have enabled bounce processing*. **Unsubscribe requests** shows the amount of people that have clicked on any unsubscribe links that you include in your email.

Click through summary

In this section, click through statistics are shown for each link. There are two statistics, **Clicks** (i.e. the number of times that a link has been clicked) and **Unique clicks** (i.e. the number of people that have clicked on links).

Click-through Summary

Clicks	Unique Clicks	Success Rate	URL
11	10	11.63%	http://civicrm.org/blog
7	6	6.98%	http://irc.civicrm.org/
14	13	15.12%	http://civicrm.org/civicrm/contribute/transact?reset=1&id=35
5	5	5.81%	http://civicrm.org/civicrm/event/info?reset=1&id=146
3	3	3.49%	http://civicrm.org/civicrm/event/info?reset=1&id=145

MAILING REPORTS WITH CIVIREPORT

CiviReport has four reports, Bounce, Summary, Clickthroughs and Opens, which offer similar functionality to what is described above. The major advantages of looking at the reports via CiviReport are that:

- you can run the reports amongst multiple mailings
- you have access to all the other cool features of CiviReport, including the ability to add reports to dashboards, get reports emailed, etc.

Read the CiviReport section for more information on CiviReport.

REPORTING

45. WHAT IS CIVIREPORT?

46. WHAT YOU NEED TO KNOW

47. SET-UP

48. EVERYDAY TASKS

45. WHAT IS CIVIREPORT?

Reporting helps your organisation to evaluate its impact and achieve its mission. Sometimes this is a requirement for funders or other stakeholders. CiviReport allows you to create, run and schedule reports based on the data CiviCRM has about your contacts and their interactions with your organisation.

These reports are queries on the database using criteria and fields available in a report template. Reports can be delivered on the page when you run them, as a dashlet on the dashboard or a scheduled email which can include a CSV file or PDF.

SCENARIO: A SIMPLE REPORT TO HELP WITH FUNDRAISING

Itwo3, a support organisation for street workers, has launched a capital campaign to raise money for a new shelter. Anne, the development director wanted to reach out to donors who made a large donation last year but haven't given money this year.

She created an instance of the LYBUNT report ("Last year but unfortunately not this") which filters data to show people who gave more than €500 last year, then ran the report and used the Add to Group button to put these donors into a new group so she could send an email to everyone in the group with information about the capital campaign.

Finally she added the report to her CiviCRM Dashboard so she can review progress getting this group of prior donors to contribute to the campaign. Anyone who donates will automatically drop off this list since they will no longer meet the criteria, and the list remaining in the dashlet can be used as the basis for follow up phone calls or other personalised contact.

SCENARIO: A REGULAR FINANCIAL REPORT

WAM is an academic membership organisation with about 1,500 members. Their members renew their membership online and pay either online by card or by offline by direct debit. Mark, the finance officer, needs several reports to keep track of the money coming in and automation of this process was a key reason for the implementation of CiviCRM. All these reports are regular and are sent to him by email with a CSV attachment so he can import the details into either their accounting software or their online banking interface. While a couple of the key reports are outlined here, their requirements were fairly complex and some custom report templates were required alongside the standard ones.

Every Monday morning, Mark receives a list of all completed online payments for the previous week to import into Sage; this report contains the amount and time of the payment along with what it was for (membership or event) and a reference ID so it can be tracked back to the record in CiviCRM. At the end of every month, he receives a list of all members who pay by direct debit whose membership is due to expire in the following month. This allows him to set up the direct debit payments for these membership renewals by importing part of the list into their online banking interface.

These email reports save Mark several hours a month and allow him to focus on issues that contribute more to the effective management of WAM's financial resources.

SCENARIO: DETERMINING TOTAL CONTRIBUTIONS FOR A HOUSEHOLD

A non-profit organisation in Ohio keeps records of individuals organised by households. A common situation is that the husband in the household has attended a number of paid events, while his wife has also registered for other events and made separate donations.

Staff at the organisation want to see the total contributions received from everyone in a household so that when someone calls the office to enquire about a donation or event payment made by someone else in the family, all the relevant information is at hand. Staff can run the Donation Summary Report (Household) as required, using the name of the household to find all contributions and relevant information to answer the caller's questions.

46. WHAT YOU NEED TO KNOW

This chapter explains key ideas that are useful when planning your use of CiviReport. It should be read by system administrators before they start to configure CiviReport for daily use. It will also be useful for anyone who wants to better understand the thinking behind CiviReport. Skip this chapter if you just want to look at specific reports that have already been configured by your administrator.

CiviReport can be used as a management tool in organisational planning and as an analysis tool for membership or donor development. Tabular or graphical output can be produced and set up to email reports to specific people according to a schedule.

The number of questions an organisation might want to ask about their data is pretty much unlimited. The CiviCRM approach to solving this problem is to aim to cater for 90% of the scenarios and allow the system to be easily extendable by administrators and developers to cover the last 10%.

KEY CONCEPTS

Report templates

A report template is the base for creating any number of reports. CiviCRM comes with a number of predefined report templates that can be used to create specific reports. For example, the Membership Report (Detail) template can be used to create a report that shows all student members that have joined your organisation within the past quarter or another that shows all cancelled memberships this year.

These templates are built to satisfy the basic needs of non-profits and organisations and future versions of CiviCRM are likely to include further report templates. You can create new templates to meet the specific requirements of your organisation and contribute these reports back to the CiviCRM community for others who have the same reporting needs. Writing a new report template requires some PHP and SQL skills. See the Developer Guide for details of how to do this.

Report vs. Search

CiviCRM has inbuilt search functionality that covers most scenarios, so it's important to know when to use a report and when to search. CiviReport gives users the ability to easily display complex information about their data, and to display answers to questions about this information in accessible ways. It is useful when you need to repeatedly ask the same question, or a set of similar questions, about your data.

The current report interface does not support most common batch actions such as Update via Batch Profile, Smart Group creation and so on. This means that if you want to perform any action against a result set, it is better to use search rather than report.

However, in some cases reports are more flexible than searches, and each has its own set of features. For example, reports allow you to change the columns displayed and in summary reports you can order by whichever display results you choose.

Report options

- **Run the report:** you can **Print Report** so it is viewable in browser or you can generate a PDF or Export to CSV. All of these run the report once when you hit the button and allow you work with it.

[Insert screenshot]

- **Dashlet:** if you make a report **Available for Dashboard**, users with appropriate permissions can add this report to their dashboard. This is useful for information that you want to see on a regular basis, such as a list of new members, or donations this month, etc. In this case the report is run every time the dashboard is loaded.
- **Email:** schedule a regular email of the report so that your finance office can receive a monthly email of all event fees received or your membership administrator gets a weekly email of overdue renewals.

Detail vs summary reports

Reports often come in pairs: one showing a summary and the other showing the detail. These reports can be linked, allowing users to see information at a glance with the option to drill down in a certain report for more detail.

KEY QUESTIONS

- Should you use CiviReport for a particular task, or could it be better achieved with a search?
- What reports are available? The list is constantly growing; for a complete list of reports available in your version, along with an explanation how the reports can be used, look at the page **Create reports from templates** (in the **Reports** dropdown menu).
- What questions do you want to ask about your data? For example, you may want to know how many new members you have in a certain period, or how much money was collected during a fundraising campaign.
- What fields do you need to include?
- Does the report provide enough options or will you need to analyse further in a spreadsheet?
- Is it a one off report or will you need to run it regularly? Could you make a report template to streamline future reports?
- Who needs to see this report? Will it provide sensitive information that should only be available to privileged users or does it give useful daily updates to all?

Details of available report templates and comparison with searches are provided for each component throughout the rest of this book; refer to the relevant section for more details about component-specific reports.

47. SET-UP

This section explains how to set up CiviReports. It assumes a basic understanding of why you would want to use CiviReport, and describes the workflow for creating a report from a template through to making these reports available for users. It also assumes that the report you require can be achieved using the report templates supplied with CiviCRM.

If the report template you need does not exist you (or your developer) should refer to the Custom Reports chapter in the Extensions section of the Developer Guide for information about creating new templates.

REPORT TEMPLATES

Report templates are general reports that can be further customised to create specific report instances. These report instances can then be made available to users.

The **Create report from templates** page lists all available report templates and is found in the **Reports** menu. The templates are grouped by component, and each has a brief description of its intended scenario. If there are already report instances for a given template, you'll see a link to view **Existing Reports**.

Contribution Report Templates	
> Donor Report (Summary)	Shows contribution statistics by month / week / year .. country / state .. type.
Existing Report(s)	
> Donor Report (Detail)	Lists detailed contribution(s) for one / all contacts. Contribution summary report points to this report for specific details.
Existing Report(s)	

Clicking on the report template name will bring up a screen where the report can be configured.

There are two steps to configuring a report:

1. Select your **report criteria**: decide what information will be displayed in the report.
2. Define the **report settings**: choose a title, set permissions and add it to a menu.

SELECT REPORT CRITERIA

There are three types of report criteria:

- Display Columns
- Group by Columns
- Filters

The options available for these criteria change from report to report. General principles for the different types of report criteria are outlined below.

Display Columns

These check boxes allow you to select the data to be displayed for each record in your report. In most reports, at least one display column is *required* and cannot be unselected. For example, in the Top Donors report, showing the total amount donated is required. In the Constituent Detail report, showing the contact name is required.

Group by Columns

This is not available in all reports, but it is useful when creating a report which summarises data, rather than displaying each individual row, and for reports that compare different types of data.

The report shown below compares donations per quarter in 2009.

Grouping(s)	Receive Date		
Receive Date	Between January 1st, 2009 and December 31st, 2009		
Donation Status	Is Completed		
Quarter Beginning	Aggregate Amount	Donations	Average
January 2009	\$ 110.00	3	\$ 36.67
April 2009	\$ 1,125.00	6	\$ 187.50
July 2009	\$ 700.00	2	\$ 350.00
October 2009	\$ 400.00	2	\$ 200.00
Subtotal	\$ 2,335.00	13	\$ 179.62
Grand Total	\$ 2,335.00	13	\$ 179.62
Row(s) Listed	6		
Total Amount	\$ 2,335.00		
Total Donations	13		
Average	\$ 179.62		

You can specify more than one grouping criteria. When you do this, groupings will be nested based on both groupings. Not all groupings or combinations of groupings will make sense for your data. You may need to spend time experimenting with Group By Columns to become familiar with this functionality.

Note that some Groups By Columns interact with Display Columns and can't be selected at the same time. The system will warn you if you try to make an invalid selection.

Donor Report (Summary) - Template

 Please correct the following errors in the form fields below:
Please Do not use combination of received date and Contact Name

▼ Report Criteria

Display Columns

☒ Contact Name

☐ Postal Greeting

☐ Email

☐ Street Address

☐ City

☐ Postal Code

☐ Country

☐ Contribution Type

☐ Contribution Source

☐ Amount Statistics

Group by Columns

☐ Contact ID

☐ Contact Name

☐ Street Address

☐ Postal Code

☐ State/Province

☐ Country

☒ Receive Date :
Frequency

Quarter ▼

☐ Contribution Source

Set Filters

Filters are the main way to specify the records that you want to include in the report. For example, running the Membership Detail report without choosing any filters will show you all membership records. You could then filter the report to show all members of a specific membership type who joined last year.

The Date Range Filter

Most reports will have a date range filter. This can be configured in two ways:

- by using an absolute date range, e.g. "1st Jan 2010" to "31 July 2010"
- by using a relative date range, e.g. "Previous Year".

Set Filters

Contact Name	Contains	
Member Since	Previous Year	
Membership Owner ID	Choose Date Range	
Membership Types	This Year	
	This Quarter	
	This Month	
	This Week	
	This Day	
	Previous Year	
Status	Previous Quarter	
	Previous Month	
	Previous Week	
	Previous Day	
	Previous Before Year	
Group	Previous Before Quarter	
	Previous Before Month	
	Previous Before Week	
	Previous Before Day	
	Previous 2 Years	
	Previous 2 Quarters	
	Previous 2 Months	
	Previous 2 Weeks	
Tag		

General

Student

Lifetime

New

Current

Grace

Expired

Administrators

Advisory Board

Newsletter Subscribers

Summer Program Volunteers

Company

Government Entity

Major Donor

Non-profit

Relative date ranges are very useful for reports that you want to run on an ongoing basis.

- **This year** gives all records from the start of the current year.
- **Previous year** gives all records from the previous year.
- **Earlier year** gives all records excluding this year.
- **Ending year** gives all records between one year from today's date, and today (really useful!).

The Ending date ranges are particularly useful when used in combination with Group By Columns. Combining Ending Year with Group By Month gives a report that summarises data by month for the previous 12 months.

The report below shows the total amount of contributions received in the past 12 months, as well as each month's total.



Once you have selected your report criteria, click **Preview Report**. If the report displayed isn't exactly what you wanted, open the **Report Criteria** section at the top of the screen to modify your criteria. You may need to make several modifications before you achieve the report you want.

REPORT SETTINGS

Once you are happy with the report criteria you have entered into the template, save it as a report instance so that it is available to use again.

1. In the **Create Report** section of the template, give your report a title and description that will help other people understand its usage, for example, "Student members joined so far this year".
2. You can optionally create a report header and footer in HTML. The header and footer will be displayed at the beginning and end of any PDF or downloaded versions of the report. This can be used to personalise your reports with your organisation's logo and to other useful information.

`report_settings_general`

3. If you wish to have the report emailed to yourself or someone else on a regular basis, fill in the Subject, To and CC fields in the Email Delivery Settings. You can enter one or more email addresses in the To and CC fields; multiple email addresses should be separated by commas. See the information below about email settings.
4. If you want to make this report available to other users through a menu item, check **Include Report in Navigation Menu?** and specify the parent menu and permissions. For example, if you would like it to appear in the Reports menu, select Reports as the "Parent Menu". Alternatively, you might want to add an event report to the event menu.

`report_settings_menu_email`

5. You can set up permissions to view reports on a report-by-report basis. This allows you to simplify the user interface for junior users and set sensitive reports to be accessible only to certain users.

Drupal installations only: the ability to edit report criteria is a separate permission that can be configured globally in Drupal. Users with this permission will be able to edit report criteria; users without this permission will be able to view reports but not edit the criteria.

6. Checking the box **Available for Dashboard?** to make the report available for users with appropriate permissions to add this report to their dashboard (this is done by clicking the **Configure Your Dashboard** button on the individual's dashboard).

`ConfigureDashboardBtn`

7. Click **Create Report**. It will now appear in the drop down list of reports under the Reports navigation menu.

Email settings

As well as entering the email delivery settings described above, you will need to configure a cron job for each report that you want to send. The cron job runs a script in the `civicrm/bin` directory (`CiviReportMail.php`) which takes several parameters, including the ID of the report instance that you wish to send.

For example, if you want to send a Donor Report to your board members, you can configure a cron job with the ID of the particular report instance to email the report in HTML or PDF format. Refer to the sections on setting up email and Cron for more information.

48. EVERYDAY TASKS

This chapter assumes that CiviReport is already configured and you are a user wanting to access reports that have been configured for you. If you want to learn more about how to set up and configure reports, read the section on setting up CiviReport.

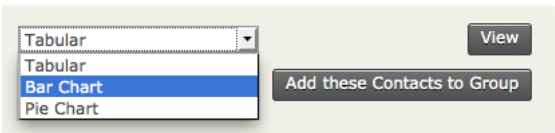
VIEWING REPORTS

To view a report:

- 1. Go to **Reports > Report listing**.
- 2. All reports are listed on this page, grouped by the component they report on.
- 3. Click on the name of the report you wish to view.

Reports can also be configured to be directly accessible from navigation menus. For example, an event report can be configured to appear in the **Events** menu.

When you open a report it will appear on screen as a table. Some reports can also be viewed as a bar or pie chart. When this is the case, a dropdown menu will allow you to select the format you want.



The appropriate report should then be displayed.



As well as viewing reports on screen you can create a PDF version of either tables or graphs, suitable for printing or emailing.

Relationship Report

[Print Report](#)[PDF](#)[Export to CSV](#)

[Next >](#) [Last >>](#) Records 1 - 50 of 151

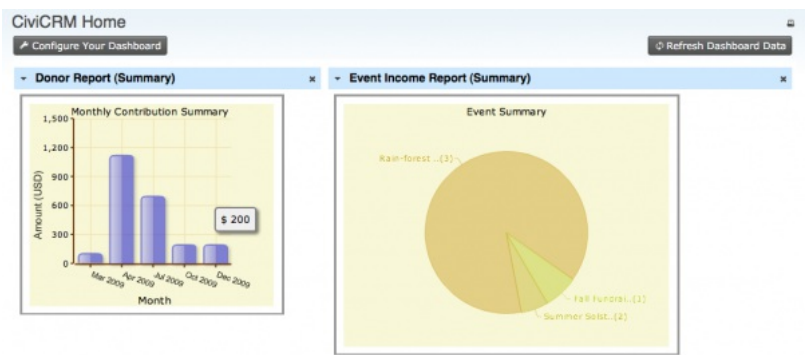
Contact A	Contact B
Mrs Chris T Zope Sr	Mr Sandy S Yadav Jr
Mr Brzeczyslaw I Parker Jr	Mr Sandy S Yadav Jr
Mrs Chris T Zope Sr	Mr Bruce M Grant Jr

If you want to perform further calculations on your report data, you can output the data as comma separated variable (CSV) for import into a spreadsheet by clicking **Export to CSV**.

If you have the appropriate permissions, you will be able to adjust the report criteria and settings when you view the report. Read the section configuring reports for detailed information about how to do this.

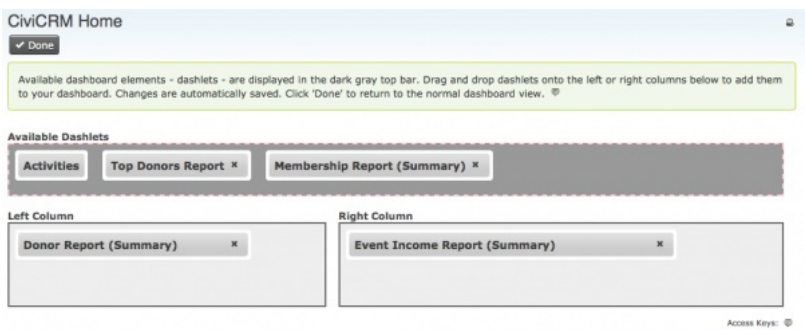
REPORTS ON YOUR DASHBOARD

Reports can be configured to appear on your dashboard (the first page you see when you log in to CiviCRM). You can configure this yourself, although not all reports may be available to put on your dashboard.



To display specific reports on your dashboard:

1. From your dashboard, click on **Configure Your Dashboard**.
2. Select a report from the list of available reports.
3. Drag the report onto your dashboard.



ADDING REPORT RESULTS TO A GROUP

Sometimes it is useful to add contacts returned in a report to a group. This functionality isn't available in all reports but where it is, you can choose the group you want to add the contacts to from the dropdown menu as shown below.

The screenshot shows a form with a 'Tabular' dropdown menu and a 'View' button. Below the 'Tabular' dropdown, there's a dropdown menu for selecting a group. The dropdown menu is open, showing a list of groups: '- select group -', 'Administrators', 'Advisory Board', 'Case Resources', 'Newsletter Subscribers', and 'Summer Program Volunteers'. The 'Newsletter Subscribers' group is highlighted. To the right of the dropdown menu, there's a button labeled 'Add these Contacts to Group'. Below the dropdown menu, there are two labels: 'Donations' and 'Average'.

CASE MANAGEMENT

49. WHAT IS CIVICASE?

50. WHAT YOU NEED TO KNOW

51. SET-UP

52. EVERYDAY TASKS

53. REPORTS AND ANALYSIS

49. WHAT IS CIVICASE?

CiviCase is a tool for tracking and managing sequences of interactions between people in your organisation and contacts in CiviCRM. It's similar to a case management system. In addition to tracking and managing your organisation's interactions with clients or constituents, CiviCase can also help you manage internal organisational interactions.

Cases are used to track complex interactions or communication processes. A case can be used to:

- track a specific workflow or set of procedures that must be followed and that involves a number of different organisational staff
- allow legislative staff to manage and track interactions while avoiding duplication
- automates the task of remembering and scheduling follow-up activities.

CiviCase relies on Activities. To learn about how they work, see the Activities chapter.

Organisations have employed CiviCase in a wide variety of situations. Here are a few examples of different types of organisations and how they might employ CiviCase.

SCENARIO: MANAGING LEGISLATOR-CONSTITUENT INTERACTIONS

A legislator's staff manages hundreds of interactions with constituents and communities daily. Legislative staff can manage and track these interactions while avoiding duplicating work (for example, if a constituent calls in about a topic that a staffer is already working on). CiviCase also automates the task of remembering and scheduling follow up activities by presenting staffers with a list of upcoming case activities that require their attention.

CiviCase came in handy to track a series of related tasks that legislative staff do as a result of interactions with constituents, including:

- A legislative staffer received a phone call about illegal dumping near the caller's home. The staffer created a case recording the details and location of the reported issue. She then assigned the task of following up with the Health Department to another member of the legislator's staff. Upon logging-in to CiviCRM, the other staff member saw that the task was assigned to them. He then contacted the Health Department on behalf of the constituent, and contacted the constituent to confirm that the Health Department was informed of the situation.
- The legislator's office received a phone call from a constituent requesting support from an agency. A staffer logged the call in CiviCase and then set up a follow-up call for the next week to make sure that action was taken on the agency's behalf.
- The legislator's staff records event invitations on an ongoing basis that a legislator's scheduler must respond to.

SCENARIO: COMPLEX APPLICATION PROCESS

An organisation administering a health department grant programme to distribute several million dollars worth of grants used CiviCase to manage the grant applications process. When interested parties submitted their initial applications, a case was automatically created to manage each. The case created contained several activities which were automatically assigned to different staff managing the application process.

In this instance the users were actually from three separate organisations who each had to apply their assessment of the application in turn. First, a basic initial assessment was made to check that certain criteria were met. Then an external organisation made a more technical assessment. The activities were all offset from the start of the case by the number of days in which it was anticipated they should be completed and a coordinator from each organisation assigned the case activities to members of staff according to their capacity as they came in.

At various stages in the process the status of the case was changed for one reason or another. In this process the main options were:

- passed basic checks
- failed basic checks
- technically feasible
- technically infeasible
- suppliers approved
- suppliers disallowed
- deferred to next round
- accepted.

Even though there were thousands of applications and tens of thousands of parts of the application review process, the coordinators from the first two organisations assigned activities to staff members so they each saw a case dashboard showing only the work assigned to them, helping them focus their energy on just their segment of the applications.

For the final assessment, the two organisations hired an external organisation to process the remaining applications. For this process, a review committee was able to view the key details of applications with different statuses, and finally, just the summary details of all applications with an accepted status to make a final determination.

50. WHAT YOU NEED TO KNOW

The CiviCase component allows for a high degree of customisation to meet the needs of a wide variety of organisations and workflows. It is important to understand CiviCase's underlying principles and assumptions, as well as the elements that can be customised, before you begin to plan and configure the component based on your requirements.

You should also understand that the configuration of CiviCase goes beyond the user interface and requires the production of an XML file to define the activity types allowed, time offsets between them, roles and other elements.

KEY CONCEPTS

CiviCase tracks interactions in two ways: cases and activities.

Activities are single interactions. For example, if a constituent calls to request information and the staff person directs them to a web site, this would be recorded as an activity. Activities have a start and end date, a status and several contacts that they may be associated with: a creator, an assignee and a target.

Cases are used to track more complex interactions or communication processes. Multiple activities can be grouped together into one case, and these activities can be optionally structured in a timeline. A case can be used to track a specific workflow that must be followed, for example: a client fills out an intake form, then has an initial meeting with a staff person, and finally receives a certificate from the organisation for meeting certain goals.

As well as linking activities around a common case, CiviCase identifies the people involved and their role(s) in the case. So while the status options may be broadly similar, the options for contacts are far more flexible than for activities and the time span is usually less determined at the outset.

Case Types

The Physician Health Program provides support for physicians who are experiencing problems related to emotional health issues, the inappropriate use of alcohol and/or drugs or coping with physical illness. Some of the case types they use are:

- In-patient Treatment
- Referral to Counsellor.

For a community services organisation, examples of case types might include:

- Housing Assistance
- Job Training
- Prenatal Counseling.

Think about the complex tasks that staff in your organisation do on a regular basis and make a list of potential case types.

Case Activities

Activities track specific interactions and tasks within a case. Activities may be scheduled in advance or created ad-hoc, and may involve the case client or constituent, or a third party such as a family member or a professional who is assisting with the case and other case workers. Each organisation needs to determine the level of detail to be recorded, but many organisations find it helpful to include every phone call, meeting or internal discussion in the case story by recording it as an activity.

Activity Types

CiviCRM is preconfigured with a number of activity types including Phone Calls, Meetings, Emails Sent, Interviews and Follow-ups. These may be sufficient for your needs. However many organisations will want to track other specific tasks, and activity types can be added for these.

During the life of each case, some activities will be automatically created, such as:

- Open Case: created at the same time the case is created.
- Follow up: you can use this type when it isn't necessary to define a more specific one (see Activity Data below).
- Change Case Type: created every time the type is modified.
- Change Case Status: created every time the status is updated.

For a community services organisation, additional activity types might include:

- Client Intake
- Skills Evaluation
- Review
- Consultant Referral.

For each of the case types you identified, create a list of the specific activities involved. Creating new types instead of relying only on Follow-up will make the list of activities easier to read.

Activity Data

A standard set of information can be entered whenever a case activity is recorded in CiviCase:

- who recorded the activity and who reported the activity
- when and where the activity will (or did) occur
- free-form subject and detailed description
- time spent on the activity.

This is sufficient for some types of activities, however it is often useful to collect additional structured data. The Open Case (intake) activity is a common example where you may want to include a set of specific questions about the client and their situation.

Create a list of additional requirements (custom data) for each activity type, including the type of data being recorded (free text, multiple choice, date, etc.) in order to set up the required custom fields. For more information about custom data fields refer to the Custom Fields chapter in the Organising Your Data section.

Timelines

CiviCase allows you to define a workplan or an expected sequence of tasks and activities for each type of case. These are called **standard timelines**, and one is created automatically when a new case is opened.

For really simple cases, the timeline might include only two items:

- Open Case
- Follow up.

Even in this example, the timeline is useful as it allows you to predefine when the people assigned to the case should follow up with the client or constituent.

For more complex processes, the timeline provides a case plan that can help the people involved to stay on track. The timeline lists all the activities which are expected to occur and should be accomplished within a certain timeframe. You can define the expected number of days between the beginning of the case and each of the subsequent activities in the timeline.

If necessary, an activity can also define an offset from another activity. For example: for a Referral to Specialist case, the "facilitate first appointment" activity might be expected to occur within 2 days after the case is opened. "Survey client satisfaction" might be scheduled for 30 days after "facilitate first appointment".

You might also want to define a timeline based on the end date. If a case has to be completed by a specific date, each activity can be defined as needing to happen a number of days before this end date. You then set a negative offset on the timeline.

Case Roles and Relationships

CiviCase provides three mechanisms for relating people to cases and clients:

- **Case Roles:** people directly involved in this case. Examples include Intake Specialist, Case Coordinator, Addiction Counselor, Employment Counselor, etc. You can identify one of these roles as the case manager for a particular case type.
- **Other Relationships:** people related to the client, with relationships that exist beyond the context of a particular case. Examples include Spouse, Sibling, Family Doctor, etc. Generally, use relationships when you want someone to appear on ALL cases for the same client, otherwise use a case role.
- **Case Resources:** people and organisations that have involvement with many or all cases in your case management setting. Examples include: regulatory agency contact(s), service provider, frequent referral contacts, etc.

CiviCRM provides relationship type definitions for most of the standard relationships you might track (e.g. Spouse, Child). However you will probably need to define additional relationship types for your case roles, such as:

- Case Coordinator
- Addiction Specialist
- Job Counsellor.

Make a list of the expected case roles for each type of case you've listed, then determine which role will normally be considered the case manager for that case type.

Key Questions

Think about these questions with regard to your organisation's use of CiviCase:

- What case types do you have?

The first step in planning your CiviCase configuration is to think about the types of cases your organisation needs to manage. Complex processes which include several activities, span several days or weeks, and involve multiple people are potentially good candidates for case management. Start by listing these processes and defining a case type for each one.

- What activity types do you need to have in those cases?
- Who should activities be assigned to? By default everything might be assigned to a case coordinator who will then reassign to whoever has capacity, or certain activities might require the intervention of a particular individual.
- Do you have a default timeline and what does it look like?
- Do activities need to be offset from the start, each other or from the end?
- What roles are involved? Are existing relationships adequate, or do you need to create some case specific ones?

Assumptions

Although CiviCase is quite flexible, there are a number of case-management assumptions built-in to the component. These assumptions have been arrived at through an extensive trial and error process and although some of them may seem new or foreign at first, we encourage you to approach them with an open mind.

- Activities are single tasks or interactions between your organisation and a client or constituent, or between people within your organisation.
- Cases involve a sequence of interactions (activities). The record of these activities forms the case story and almost all information about a case should be stored as an activity.
- Classifying cases by case type allows you to define work-flows and evaluate results.
- Cases often have a predictable sequence of activities (a standard timeline). Creating a schedule with the expected timeline helps people working on the case to manage their work, and is a useful way to measure progress.
- Cases often involve a predictable set of people involved (staff, professionals, etc.). These are case roles. Knowing who is playing what role in a case is helpful, and provides an easy way to communicate case activities to other people who are also working on that case.
- Organisations may have additional people and/or outside organisations (case resources) who are frequently contacted or involved with most or all cases.

51. SET-UP

Now that you've gone through the planning process and determined the types of cases, activities and case roles that you need, you're ready to configure your CiviCase installation.

The configuration process requires some technical skills. Review these prerequisites before getting started, and recruit assistance if needed.

PREREQUISITES

As of CiviCRM 4.1, the sample configuration will work immediately after enabling CiviCase. However, to customize the configuration, many of the steps require that you create and edit files outside of the CiviCRM user interface. You will need to:

- use a text editor
- edit XML files and upload them to the server directory where CiviCRM is installed
- (optionally) write or modify a simple program using the API to automate the creation of activity types or relationships.

CONFIGURATION TASKS

Follow these steps to set up CiviCase for your organisation:

1. Enable the CiviCase component

Once you have created your configuration files and uploaded them to the configuration directory in your CiviCRM installation, you must enable the CiviCase component. The CiviCase component is included in CiviCRM downloads, but it is NOT enabled by default. To enable the component:

1. Go to **Administer > Configure > Global Settings > Enable Components**.
2. Select CiviCase in the left-hand box and click **Enable** (this should move it to the right side).
3. Click **Save**.

You will now see an **Other** option in the navigation menu. Click that option to see the **Cases** menu. People in your organisation who work with cases will probably want to modify their navigation menu to move **Cases** to the top-level.

Navigate to **Administer > Customise > Navigation Menu** to make this change.

2. Case Type Configuration Files

You will create a separate XML-formatted text file for each of the case types you identified during the planning process. These files specify the characteristics of the case type using XML elements.

Case configuration files should be saved to the following directory in your CiviCRM installation:

```
<civicrm_root>/CRM/Case/xml/configuration
```

You will need to create this directory when you save your first configuration. Ensure that the directory is readable by your web server process.

If you are not familiar with XML markup, refer to the Wikipedia page on XML at: <http://en.wikipedia.org/wiki/XML>

A set of sample configuration files are included when you download CiviCRM. If you can access the CiviCRM codebase at <http://svn.civicrm.org/civicrm/>, load the sample case type configuration file for Housing Support in your text editor before continuing, and refer to it as you review each of the sections below.

```
<civicrm_root>/CRM/Case/xml/configuration.sample/HousingSupport.xml
```

- **Activity Types:** this is a list of all activity types that are valid for this type of case. Several activity types will be needed for any type of case. Be sure to include them in this listing: Open Case, Change Case Status, Change Case Type, Follow up. You will use Change Case Status to close a case. Follow up is a useful general activity type for most case settings.

You can optionally specify the maximum occurrences of this activity type in a case using the `max_instances` element. Generally you'll want to set `max_instances` to 1 for the Open Case activity type, but you can also use this to limit recurrence of other types of interactions or processes.

- **Activity Sets:** groups of activity types which define a sequence of interactions. You must include at least one activity set in the configuration file which defines the `standard timeline` (plan). The activities in the standard timeline set are automatically created when you open a case of this type. You can control the scheduling of each activity relative to the date the case is opened OR relative to another activity using the `reference activity` and `reference offset` elements. Offsets are expressed in days.

Here's a simple timeline example for a Housing Support case:

```
<ActivitySet>
  <name>standard_timeline</name>
  <label>Standard Timeline</label>
  <timeline>true</timeline>
  <ActivityTypes>
    <ActivityType>
      <name>Open Case</name>
      <status>Completed</status>
    </ActivityType>
    <ActivityType>
      <name>Medical evaluation</name>
      <reference_activity>Open Case</reference_activity>
      <reference_offset>1</reference_offset>
      <reference_select>newest</reference_select>
    </ActivityType>
    <ActivityType>
      <name>Mental health evaluation</name>
      <reference_activity>Open Case</reference_activity>
      <reference_offset>1</reference_offset>
      <reference_select>newest</reference_select>
    </ActivityType>
    <ActivityType>
      <name>Secure temporary housing</name>
      <reference_activity>Open Case</reference_activity>
      <reference_offset>2</reference_offset>
      <reference_select>newest</reference_select>
    </ActivityType>
    <ActivityType>
      <name>Follow up</name>
      <reference_activity>Open Case</reference_activity>
      <reference_offset>3</reference_offset>
      <reference_select>newest</reference_select>
    </ActivityType>
    <ActivityType>
      <name>Income and benefits stabilization</name>
      <reference_activity>Open Case</reference_activity>
      <reference_offset>7</reference_offset>
      <reference_select>newest</reference_select>
    </ActivityType>
    <ActivityType>
      <name>Long-term housing plan</name>
      <reference_activity>Open Case</reference_activity>
      <reference_offset>14</reference_offset>
      <reference_select>newest</reference_select>
    </ActivityType>
    <ActivityType>
      <name>Follow up</name>
      <reference_activity>Open Case</reference_activity>
      <reference_offset>21</reference_offset>
      <reference_select>newest</reference_select>
    </ActivityType>
  </ActivityTypes>
</ActivitySet>
```

In this example, the Open Case activity is marked as Completed when the case is opened. Three additional activities are automatically scheduled when the case is opened. A medical evaluation is scheduled for the following day (reference offset is 1); then secure temporary housing (reference offset 2); and finally a follow-up three days later.

- **Case Roles:** this section lists the types of people who are involved in the case in some way. Roles listed here will be automatically created when the case is opened. One role is marked as **creator**. This role is automatically assigned to the person who created the case. After the case is opened, users with access to the case can assign the remaining roles to contacts as appropriate. You may also mark one of the roles as the **case manager**. The case manager's name will be displayed prominently in case listings and reports.

Here's a simple example of case roles for a Housing Support case:

```
<CaseRoles>
  <RelationshipType>
    <name>Homeless Services Coordinator</name>
    <creator>1</creator>
    <manager>1</manager>
  </RelationshipType>
  <RelationshipType>
    <name>Health Services Coordinator</name>
  </RelationshipType>
  <RelationshipType>
    <name>Benefits Specialist</name>
  </RelationshipType>
</CaseRoles>
```

In this example there are three case roles. The Homeless Service Coordinator is both the creator and manager of these cases. In addition, a Health Services Coordinator and a Benefits Specialist role are created when the case is opened.

Refer to the detailed configuration documentation on the wiki for more detailed explanations of each element in the XML file:

<http://wiki.civicism.org/confluence/x/UIC9AQ>

Create a separate XML file for each of your **case types**. Your file names should match the case type name with spaces removed and the first letter of each word in upper case.

For example, if the case type is Housing Support, the filename would be "HousingSupport.xml". A good approach is to use a copy of one of the sample configuration files that are included in the distribution as a starting point, and edit it to meet your requirements.

3. CiviCase Drupal permissions

This section applies to Drupal installations only.

In order for users to add and manage cases, you will need to configure CiviCase-related permissions in Drupal (**Administer > Users > Permissions**). You may want to create case management-specific Drupal user roles for staff, based on their responsibilities within your organisation. You can assign permissions to users in order to control whether or not they have access to the CiviCase component, as well as what case data they can see (**Administer > Users > Permissions**).

The following is a list of the CiviCase-related permissions:

- **Access my cases and activities:** allows a user to create new cases, add activities to the cases they've created and edit those activities. Users with this permission can NOT see cases or activities created by others.

If you need to restrict certain users to ONLY seeing case data (i.e. hide all other contact information from them), assign "access my cases and activities" permission WITHOUT "edit and view contacts" permission. This permissioning model is useful for users who are external to your organisation and who should not be allowed to see contact details.

- **Access all cases and activities:** allows a user to create new cases, as well as view and add activities to any case (regardless of who initially created the case).
- **Delete in CiviCase:** allows a user to mark cases or case activities as deleted. Cases and activities are never physically deleted from your database, but only hidden when you mark them as deleted.

Users with this permission can also find and undelete these cases `FindDeletedActivities` and activities by checking the **Deleted Cases** option in **Find Cases** and the **Deleted Activities** option in the **Case Activities Search Filter**.

- **Administer CiviCase:** gives access to **Administer > CiviCase** options including:
 - create and edit case types and case statuses
 - set rules for redacting case data. These rules are used to disguise data which could be used to identify the case client in case reports which are shared with external reviewers.

4. Populate Case Types, Activity Types, and Case Roles

You will need to add database records for each Case Type, Activity Type, and Case Role that you've included in your case type configuration files. You can use the CiviCRM Administrative screens to do this.

To add case types:

1. Go to **Administer CiviCRM > CiviCase > Case Types**.
2. Click **New Case Type**.
3. Complete the form using the exact same text for the **Label** as you entered for the `CaseType <name>` element in your case configuration files.
4. Click **Save**.

Activity types

Generic activity types (Open Case, Change Case Status, etc.) are included in all CiviCRM installations. Meeting, Phone Call, Email (inbound and sent) activity types are also included by default. However you will need to manually add any other activity types that you've defined in your case configuration files.

1. Administer **CiviCRM > Option Lists > Activity Types**.
2. Click **New Activity Type**.
3. Complete the form using the exact same text for the **Label** as you entered for the `ActivityType <name>` element in your case configuration files.
4. Select **CiviCase** in the Component drop-down.
5. Click **Save**.
6. Repeat for each unique activity type defined in your case configuration files.

Alternatively, if you have a lot of entries, you may prefer to use the API to write a simple programme to automatically create all the activity types:

```
<?php
require_once 'civicrm.config.php';
require_once 'CRM/Core/Config.php';
require_once('api/api.php');

//read the API chapter to get more explanation
$componentCase = 7;
$types = array ("Medical evaluation","Secure temporary housing");
foreach ($types as $type) {
    $param = array("label"=>$type,"description"=> "Example of Type","component_id" =>
        $componentCase, "is_reserved"=>false,"is_active"=>1,"weight"=>1,
        "version"=>3);
    $result = civicrm_api('activity_type', 'create', $param);
    if (civicrm_error( $result )) {
        echo "\n ERROR creating $type: ". $result['error_message'];
    } else {
        echo "\n Type $type created";
    }
}
?>
```

Case roles

You will need to define relationship types for any case roles you've defined in your case configuration files. Examples might include Intake Coordinator, Employment Counsellor, Housing Advocate, etc.

1. Go to **Administer CiviCRM > Option Lists > Relationship Types**.
2. Click **New Relationship Type**.
3. When completing the form fields, define the relationship using the "client as Contact A" and the service provider as "Contact B". The **Relationship Name-B to A** value should match the text entered for the RelationshipType <name> element in your case configuration files.
4. Click **Save**.
5. Repeat for each unique case role.

For example, to define a Case Coordinator relationship type:

Relationship Name-A to B : "Case Coordinator is"

Relationship Name-B to A : "Case Coordinator"

Contact Type A: "Individual"

Contact Type B: "Individual"

Again, if you have a lot of entries, the process of defining relationship types can be automated using the API:

```
<?php
require_once 'civicrm.config.php';
require_once 'CRM/Core/Config.php';
require_once('api/api.php');

//read the API chapter to get more explanation
// if you are getting errors, make sure there are no line breaks in the middle of a field
below
$types = json_decode ('[ { "name_a_b": "Case Coordinator is", "name_b_a": "Case
Coordinator", "contact_type_a": "Individual", "contact_type_b": "Individual"}, { "name_a_b": "Benefit
Specialist of", "name_b_a": "Benefits
Specialist", "contact_type_a": "Individual", "contact_type_b": "Individual"} ] ');

foreach ($types as $type) {
    $params = get_object_vars($type);
    $params['version'] = 3;
    $result = civicrm_api('relationship_type', 'create', $params);
    if (civicrm_error( $result )) {
        echo "\n ERROR creating {$type->name_a_b}: ". $result['error_message'];
    } else {
        echo "\n Type {$type->name_a_b} created";
    }
}
?>
```

Custom fields

It is likely that you will want to collect structured data for some of the activity types you've defined. You can collect data in custom fields connected to a specific activity type. For example, in Employment Counselling cases, you may want an activity type Skills Assessment, in which an employment counsellor records client job skills. This activity type will require one or more custom fields, perhaps a set of checkboxes. If you are transitioning from a paper-based system, it is helpful to refer to existing forms and then determine what information from the forms is relevant to include. Remember that CiviCase is designed to store case information within activity records, and does not support custom fields at the case level.

Please review the section on configuring custom data fields prior to beginning these steps.

1. Go to **Administer > Customize > Custom Data**.
2. Click **New Group of Custom Fields**.
3. Under **Used For**, select **Activities**.
4. Select one or more specific activity type(s) for which this set of fields will be used.
5. Enter any help information you want to be displayed to your users.
6. Click **Save**.
7. Enter one or more custom fields for this set.
8. Repeat these steps for each activity type which requires custom data to be recorded.

If you need to define a large number of fields for a given activity type, consider breaking them up into sets of related fields. Group the fields into logically related sets that will make sense to the users, and avoid the form looking like an endless tunnel of fields.

You can assign more than one custom data field group to a single activity type. For example, if you are collecting a lot of data during client intake, you may want to create several sets of custom fields for the Open Case activity type.

If you have sets that are only relevant to some contacts, for example a different set of fields for male or female contacts, you can modify the form's template and add client-side logic using jQuery to hide/show the relevant sets based on the values selected on previous fields.

Filing Emails on Cases

Some organizations find it useful to record case-related emails in CiviCase. For example, the case coordinator for a work disability case might send an inquiry to a state agency representative and would like both the sent email and the reply to become part of the case story.

You can choose to send outbound emails directly from the Manage Case screen, but you can also set up CiviCRM to integrate with your usual email client so you can send and receive emails as usual and also have them filed in CiviCRM.

In the CiviMail chapter the Email Processor was described as a way to get inbound and outbound emails into CiviCRM as non-case activities. When you enable CiviCase, a new action will be available that allows you to file any non-case activity onto a case.

Additionally, when email activities are sent from the Manage Case screen, if the Email Processor has been set up then replies will automatically be filed directly onto the case.

5. Add staff members

You will need to create a contact record for each staff member or service provider who will be using CiviCase to enter or view case information. These individuals will also need to have a Drupal or Joomla! user account.

For Joomla! installations, staff members must have back-end (administrator) access. All CiviCase functions are done within the Joomla! Administrator interface.

You should also add contact records for service providers who will be assigned case roles but will not be accessing the CiviCase system. This will allow your staff to easily send emails with pertinent case and client information to these providers via CiviCase, as well as record case-related interactions reported by providers.

52. EVERYDAY TASKS

This chapter describes a list of everyday tasks that you might perform using CiviCase, and how to go about them.

VIEWING THE CASE DASHBOARD

The Case Dashboard gives you an easy way to keep track of case-related tasks. It provides:

- a summary of cases in the system (Summary of Case Involvement)
- a list of your cases with upcoming activities (scheduled in the next 14 days)
- a list of your cases with recently performed activities (completed in the last 14 days).

If you have permission to view cases other than ones that you are working on, you also have the option to see:

- a list of all cases with upcoming activities
- a list of all cases with recently performed activities.

You can switch between viewing Your Cases and All Cases by clicking on the link at the top right of the content area.

Click the **Edit** icon next to the Next Sched. activity name to work on that task. In the case shown in the following screenshot, the Next Sched. activity is Medical evaluation. You can view this activity in a pop-up window by clicking directly on the title. If you're ready to work on that activity, click the edit pencil to the right of the activity title.

Client	Status	Type	My Role	Case Manager	Next Sched.	
 Grant, Anne Case ID: 3	Ongoing	Adult Day Care Referral	Senior Services Coordinator	---	Medical evaluation April 28th, 2010 5:04 PM	Manage Case

field

Click on the triangular expand icon (►) to the left of the client name to see the complete list of activities for that case. From this list you can view or edit any activity in that case. Click **Manage Case** when you want to work on a number of tasks within a case or to change the status of the case, print a case report, or view case roles.

To add a new case from the Case Dashboard, click the **Add Case** button at the top left of the content area.

FINDING CASES

If you know the Case ID, you can quickly find the case by using full-text search, either from **Search > Custom Search > Fulltext Search** or from the fulltext search block if you have enabled it.

You can search for cases by going to **Search > Find Cases** or under **Cases** in the menu bar at the top of the CiviCRM screen. The Cases search form gives you a number of options. You can search by each option individually, or combine them for further filtering.

You can search by:

- client's name or email address: type characters from the name or email address into the Client name or email input field
- type or types of cases: checking the case types that you would like to filter by
- case status: selecting a status from the dropdown menu
- all cases or your cases (if unselected, the default is to filter by your cases)
- deleted cases: click the **Deleted cases** checkbox.

If you make selections in multiple criteria (e.g. adding a client name, checking off a case type, and selecting "all cases") the search criteria will be combined so that the results must fulfill at least one requirement in each set of criteria (the cases found will contain the client name AND case type). In contrast, making multiple selections within one set of criteria (e.g., checking two case types) will ensure that the returned results fulfill *at least one* of the selections in the criteria set (in this example, cases must match at least one of the case types).

OPENING A NEW CASE

You can open a new case with either an existing contact or a new contact not yet in your system.

Creating a case from an existing contact's summary screen or actions menu automatically links the case to that contact. To open a case on an existing contact, follow these steps:

1. Go to the contact's summary screen.
2. Select **Add Case** from the **Actions** dropdown menu, or alternatively click on the **Cases** tab.
3. Fill in the required fields in the **Add Case** form.
4. Click **Save**.

If you open a new case for a new contact, the contact's record in CiviCRM is created at the same time as you create the case. Follow these steps:

1. Go to **Cases > New Case** or select the **Create New > Case** dropdown button. This button is provided as a block in Drupal or on the left hand side in Joomla!. (Remember, if you haven't made **Case** a top-level menu item, you'll have to navigate to **Other > Cases > New Case**.)
2. If you've opted to create a new case without navigating to an existing contact first, you may want to check whether the contact already exists in the database. Type the name or email of the contact you are looking for in the **Select Contact** field, and you will see a list of potential matches (as illustrated by the following screenshot).

3. If you don't find the contact, you can create it immediately by selecting the type of contact from the **create new contact** list. This opens a pop-up window (shown in the following screenshot) that allows you to fill out the new contact's name and other information while opening the case. The fields in this pop-up window are controlled by the fields in the **Add Individual** profile. This means you can easily add or modify the fields provided. You can read more about profiles in the Profiles chapter.

Use the **Medium** and **Location** fields to record information about where and how this case came to your attention. For example, you might select **In Person** for Medium and **At the Annual Gala** for Location.

Use the **Details** text area to add information pertaining to the overall case, but not to a specific *activity* of the case. An example might be "Jane is concerned about some illegal land use that she has witnessed in her neighbourhood, and would like us to see what can be done about it. I told her that the best person to look into this was Tom, and she asked whether her husband could be included on any correspondence."

The **Subject** field is displayed in search results and in other listings of cases, next to the name of the case client. Keep this in mind when entering the subject text: a brief and unique description of the case will be more helpful than using the client's name as the subject.

The **Case Type** selector allows you to choose the type of case that you are creating. Many case types have specific activities and timelines, so it is important to choose the appropriate case type at this point. You can change to a different case type at a later point by clicking **Manage Case** next to the case when it's displayed in the **CiviCase Dashboard**, or from the contact's record **Case** tab. Then select **Change Case Type** from the **New Activity** dropdown menu. Changing an ongoing case may require you to then update or re-enter some data.

The **Case Status** selector allows you to indicate the current status of the case. Generally you will use a status such as **Ongoing** or **Urgent**, but if you are adding a case that has already been completed (for tracking purposes) select **Resolved**.

The **Case Start Date** field defaults to the current day. If you are creating a case that has already been completed or entering data for upcoming cases (not yet started), adjust the case start date accordingly.

The **Duration** field records the time spent collecting the data needed to fill out the create case form, not the amount of time it took to fill the form out. Fill out the number in minutes. For example, you might use this field to record the number of minutes spent on the phone with a constituent as they described the case.

4. After you complete the fields in the pop-up window, clicking the **Save** button saves the case and loads the Manage Case page, where you can then modify activities, add attachments and assign case roles. Alternatively, clicking **Save and New** saves the case and resets the form so that you can add further new cases uninterrupted (this is particularly useful if you are doing data entry). Clicking **Cancel** discards the case data you have entered and sends you back to the CiviCRM dashboard.

ASSIGNING CASE ROLES

You can assign case roles to contacts who are working on the case or need to stay informed about case activities. Users who have access to CiviCase and are assigned a role in the case will then see that case in their My Cases view. The phone number and email address of each person with a case role will be displayed on the case, making it easy to communicate with them (see screenshot).

Case Roles				
Add new role				
Case Role	Name	Phone	Email	Actions
Homeless Services Coordinator (Case Manager)	jonesmelinda@earthlink.co.pl	502 222-1041 ext 35		
Health Services Coordinator	Smith, Bill	74143518		
Benefits Specialist	(not assigned)			

Within a case, you can assign a case role to a contact:

1. Click the **Case Roles** area to open it.
2. Case roles that have not been assigned display **(not assigned)** in the **Name** column. Click the edit icon to assign someone to that role.
3. The **Assign Case Role** pop-up window will appear. Begin typing the *last name* of the contact until you see the name in the dropdown list.
4. Select the contact you want to assign to the role and click **OK**.

Generally, anyone who might be assigned to a case should already be in the database, but if you can't find the person you're looking for, you must add her as a contact first (navigate to **Contacts > New Individual**).

Each assigned case role has mail, edit and delete icons under the **Email** and **Actions** columns. You can email contacts with roles in the case, or modify their relationships to the case. Change the case role by clicking the edit icon, or delete a case role by clicking the delete icon. Emails that you send from here are automatically added to the list of case activities in the proper sequence. This provides an audit trail of case-related communications, and ensures that the case story is complete.

FINDING ACTIVITIES WITHIN A CASE

You may need to find a specific activity within a case, for reference or modification. To view the activities in the case, scroll down to the **Case Activities** section and click it to open it. In the default view, scheduled activities are listed first, sorted by date, followed by completed activities. Click on the column headers to sort by a specific column (for example, by activity type).

If there are many activities, you can filter them to see a smaller subset. You may want to view activities of a certain type (for example, to see all of the **Follow up** activities that have been performed for this case). Click the **Search Filters** button, which opens a form that allows you to filter by:

- Reporter/Role
- Activity Status
- Activity Dates (enter a range by filling in both date fields, or search for activities performed on a specific date by filling out the first date only)
- Activity Type (for instance, to find all follow-up activities, select **Follow up** from the list)
- Deleted Activities (available to people with permission to view deleted activities).

Once you have selected your search criteria, click the **Search** button to the right and the table will automatically filter out all of the activities not matching your criteria.

ADDING AND MANAGING ACTIVITIES

Several tasks are commonly performed on activities. After performing the necessary work, click the **Save** button to save the activity and be sent back to the case page, or **Cancel** to discard your work.

To add a new activity to a case

1. Navigate to the case (either using **Find Cases** or via the **Cases Dashboard**).
2. Choose an activity type from the select list labeled **New Activity** in the **Case Summary**.
3. Click **Go**.
4. Fill out the activity form. The Client field will be pre-populated with the case's client data.

To send a copy of the activity to anyone with a case role for the case

1. Open the **Send a Copy** area.
2. Check the contacts or case roles whom you would like to be alerted about this activity.

To schedule a follow up activity

1. Open the **Schedule Follow-up** area.
2. Select the follow-up activity type, the number of days until the follow-up should occur, and subject of the follow-up (e.g. "confirm that Jane's problem is fixed").
3. Click **Go**.
4. Complete the form and click **Save**.

To add an attachment to the activity

1. Open the **Attachments** area.
2. Click a **Choose file** button.
3. Up to five files can be attached to an activity. Select an attachment from your file browser.
4. Click **Choose**. The name of the attachment will appear to the right of the **Choose file** button.

The attachment will not be saved into CiviCRM until you have saved the activity.

EDITING AN ACTIVITY IN A CASE

To edit an activity in a case:

1. Navigate to the case from the **Case Dashboard**, the **Find Cases** search form, or the contact's **Cases** tab.
2. Click **Edit** at the far right side of the activities table at the bottom of the case form.
3. This brings you to the activity form, which you can edit in the same way as when creating an activity for a case. The only difference is that many of the fields will already be filled in.

To assign a scheduled task to a staff member while adding or editing a case:

1. Start typing the staff member's name into the **Assigned to** field; a list of possible contacts will appear.
2. Select from the list of suggestions and make sure the staff member's full name shows up in the **Assigned to** field.

You can assign multiple contacts to an activity. If you accidentally select the wrong contact, click the X by the contact's name to remove him from the list.

CHANGING THE STATUS OF A CASE

The case status lets you quickly determine how a case is progressing. Sample status values include Ongoing, Resolved, Not Assigned, and Urgent.

To change the status of a case:

1. Navigate to the case from the **Case Dashboard**, the **Find Cases** search form, or the contact's **Cases** tab.
2. Click **Manage Case**.
3. Click the **Edit** icon next to the current status column in the Case Summary table.
4. This will open the **Change Case Status** form (an activity with an additional field called Case Status).
5. Set the case status to the new status.
6. Modify the other the fields as you would when editing an activity in a case. Make sure to set the **Status** field. It is required, but not set by default.
7. Click **Save** to return to the case page, with a message stating that the Change Case Status Activity has been created.

An activity is recorded because when a case status changes, it changed because something happened. It is usually equally as important to record the *who* and the *why* as well as the *what*. This behaviour is consistent throughout CiviCase.

For information on reporting, see the following chapter on Reports & Analysis.

53. REPORTS AND ANALYSIS

There are a number of techniques for reporting on and analysing your casework. The case dashboard gives a very useful quick overview of your current cases, with rows for each case type and columns that show current totals for each status. Clicking through any number (0 will not be linked) will take you a list of all the cases of that type in that status.

[insert screenshot]

That's a good start and can provide a good overview for an administrator but there are a couple of ways that you can create more detailed and customised views of the data for case workers and administrators using CiviCRM's search features and CiviReport.

CIVICASE REPORTS

There is no report template specifically for cases, but since cases are made up of activities the Activity report will usually play an important part here. The Activity report template is particularly useful for providing a dashlet for each user involved in casework so they can track all activities assigned to them. Given that these case activities will be displayed alongside other non-case based activities, you may want to implement a protocol for activity names which include some kind of case reference.

Printing Case Reports

To print a report that lists all case and case activity data:

1. Navigate to the case from the Case Dashboard, the Find Cases search form, or the contact's Cases tab.
2. Click Print Case Report in the Case Summary section.

Your installation may define additional reports for audit or quality assurance purposes. If so, you will see them listed in the "Run QA Audit/Redact" dropdown menu.

SEARCHING BASED ON CASES

There is a Find Cases search which allows you to search on Case Type and Status as well as by client name or email. This is a useful quick search to identify a few cases that may need specific input if the case dashboard is quite large and cluttered in your instance.

Home > CiviCRM > CiviCase Dashboard

Find Cases

▼ Edit Search Criteria

Client Name or Email

Case Type

☐ Housing Support

☐ Adult Day Care Referral

Case Status

- any status - ▼

☐ Search All Cases ☐ Only My Cases (clear)

☐ Deleted Cases

The Advanced search provides these options combined with all the other normal search criteria so you can find case types filtered by location or custom fields applied to the contact

▼ Cases

Case Type

☐ Housing Support

☐ Adult Day Care Referral

Case Status

- any status - ▼

☐ Search All Cases ☐ Only My Cases (clear)

☐ Deleted Cases

Also useful can be the Activity Search which is located under **Search -> Custom Searches -> Activity Search**. Unlike Advanced search, this is just based on activities and not contacts.

FURTHER ANALYSIS

If the combination of Case Dashboard, CiviReport and the contact and activity searches aren't giving you what you want, consider commissioning a new report or custom search. Read the CiviReport section and the 'Search and actions' chapter for more information.

CAMPAIGN

54. WHAT IS CIVICCAMPAIGN?

55. WHAT YOU NEED TO KNOW

56. SET-UP

57. EVERYDAY TASKS

58. REPORTS AND ANALYSIS

54. WHAT IS CIVICCAMPAIGN?

CiviCampaign lets you link together events, mailings, activities, and contributions under one "umbrella" so that you can track the progress of all your efforts towards one programmatic goal or campaign. This enables organizations to measure and analyze the effectiveness of their outreach and mobilization efforts.

CiviCampaign allows you to:

- create surveys and petitions
- record responses to surveys and petitions
- link activity such as donations, mailings and events to a particular campaign
- track who has voted using Get Out The Vote (GOTV)
- record individual members' levels of interest and engagement in a particular activity.

CiviCampaign is integrated with other CiviCRM components so that you can select which activities are part of the overall campaign or goal.

For Drupal sites, the CiviEngage module enhances CiviCampaign by providing a package of custom fields that enable the Survey and Petition features of CiviCampaign. Read more about CiviEngage in the Civic Engagement section.

SCENARIO: YEAR-LONG MOBILIZATION CAMPAIGN

To kick off a year-long campaign to mobilize community members, the Townsville Organisation For Tenants (TOFT) held a protest at the Capitol. The campaign organizers use CiviCampaign to associate all related campaign activities together over the course of the campaign.

The lead organizer created a campaign called "Mobilize the Masses 2011" to link a series of related activities including communications about the mobilizing event, participation and financial contributions for transport and food during the action.

Using CiviCampaign, the organisers:

- created a Campaign as the umbrella for all related activities, including the duration of the campaign and the revenue goal
- created a group consisting of the individuals they wanted to target for the activities in the campaign
- called their most active members to help organize other constituents in their neighborhoods to participate, and recorded the activity phone call in the individual's record, indicating the specific campaign and the member's response
- sent a mass fundraising mailing and indicated the campaign, which was then recorded in the contribution information of individuals' records
- created an event to track who will be attending the mobilization, and indicate the campaign in the event setup.

Periodically throughout the campaign, the program lead searches all of the activities related to the campaign, and/or individuals who have activities related to the campaign, to monitor the effectiveness of their outreach and fundraising efforts, and if necessary adjust strategies.

Organizers can relate subsequent events, mailings, and other activities with the same campaign as it proceeds over the course of the year. At the end of the campaign this information can be reviewed within the context of the whole campaign.

55. WHAT YOU NEED TO KNOW

Before you create a campaign, it's a good idea to review the concepts in this chapter to understand how CiviCampaign can best help you manage your work, and consider the key questions in relation to your organisation's specific needs.

KEY CONCEPTS

Your organisation will likely have its own campaign strategies and processes. CiviCampaign is a tool that you can use in conjunction with your existing methods, to streamline and automate certain processes.

Campaign Goals and Revenue

Define and document the concrete goals of the campaign, and what you hope to raise in funds (if applicable), and record it in the campaign information. This will enable you to use reports to analyze the effectiveness of a campaign at its conclusion.

Planning Your Campaign Activities

As you plan the strategy of your campaign and identify your target audience, determine what activities and information can be recorded within CiviCRM. Make sure that all recorded activities and information is connected to the campaign, so that you can track all efforts and individuals' activities related to the campaign. This allows you to make periodic and overall evaluations of the effectiveness of your activities, strategies and outreach efforts.

KEY QUESTIONS

Answer these questions in the context of your organisation or a specific campaign:

- Who are your target audience, and how will you reach them? Remember that the audience for your campaign activities may not be the same as the audience you are trying to reach with the actual campaign itself. Understanding your target audience will help you to choose the most appropriate strategies and communication activities to achieve the goal(s) of your campaign.
- What activities and strategies, such as events and mailings, will be associated with this campaign?
- How will you be gathering data during the campaign (e.g. surveys, petitions, event registrations) and who will be responsible for entering the data into CiviCRM?
- What kind of reports will be useful for monitoring progress and evaluating the campaign at its conclusion?

CIVIENGAGE AND CIVICAMPAIGN

CiviEngage is another component that enhances CiviCampaign with more functionality for surveys and pre-configures your installation of CiviCRM with custom data sets, profiles and enhancements to reports. See the section Civic Engagement for more details about CiviEngage.

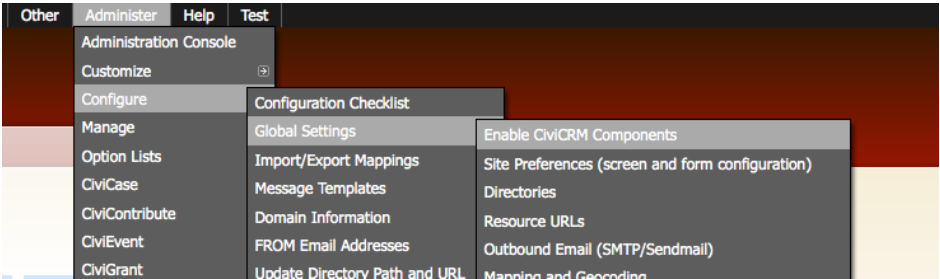
SET-UP

This chapter will help you to set up with CiviCampaign so that it enhances the effectiveness of your organization's campaigns.

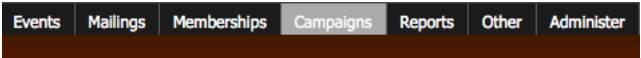
ENABLE CIVICAMPAIGN

First, you need to enable the CiviCampaign component.

1. Go to **Administer > Configure > Global Settings > Enable CiviCRM Components**.
2. Select **CiviCampaign** and click **Enable**.



Once CiviCampaign is enabled, it will show up as a new menu item **Campaigns** along the top of your CiviCRM screen.



ADD A NEW CAMPAIGN TYPE

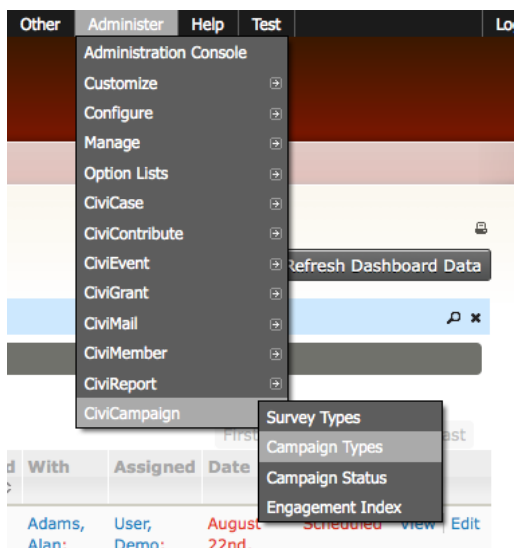
CiviCampaign provides three default campaign types:

- Direct Mail
- Referral Program
- Constituent Engagement.

You can add any campaign type that is appropriate for your work (and disable those that aren't).

To add a new campaign type:

1. Go to **Administer > CiviCampaign > Campaign Types**.



2. This will display a list of existing campaign types:

Campaign Type Options						
The existing option choices for Campaign Type group are listed below. You can add, edit or delete them from this screen.						
Add Campaign Type						
Label	Value	Description	Order	Reserved	Enabled?	
Direct Mail	1		↓ ↓ ↓	No	Yes	Edit Disable Delete
Referral Program	2		↑ ↑ ↓ ↓	No	Yes	Edit Disable Delete
Constituent Engagement	3		↑ ↑	No	Yes	Edit Disable Delete
Add Campaign Type						

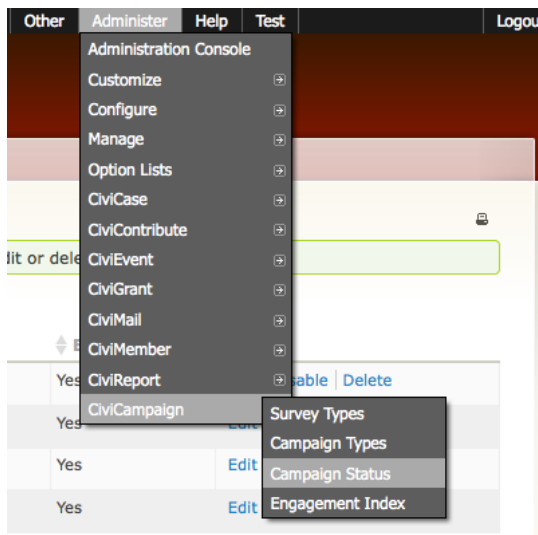
3. Click on **Add Campaign Type**, and give the new type a label and a description (optional).
4. Optionally, change the default weight: this affects the order in which this new event type appears in drop-down menus (smallest numbers appear highest).
5. Click **Save**.

The next time you add a new campaign, this campaign type will be available to assign to your new campaign.

CAMPAIGN STATUS

Assigning a status to your campaign makes it possible to update campaign activities in the database and track how the campaign is proceeding.

1. Go to **Administer > CiviCampaign > Campaign Status**.



- The default statuses are Planned, In Progress, Completed, and Cancelled.
2. Click **Add Campaign Status**, give it a name and, optionally, a description.
3. Changing the weight is not necessary but will affect the order in which this new status appears in drop-down menus.
4. Click **Save** and the new status will then be available to assign to campaigns.

Campaign Status Options

The existing option choices for Campaign Status group are listed below. You can add, edit or delete them from this screen.

Add Campaign Status

Label	Value	Description	Order	Reserved	Enabled?	
Planned	1		↓	No	Yes	Edit Disable Delete
In Progress	2		↑ ↓	No	Yes	Edit Disable Delete
Completed	3		↑ ↓	No	Yes	Edit Disable Delete
Cancelled	4		↑	No	Yes	Edit Disable Delete

Add Campaign Status

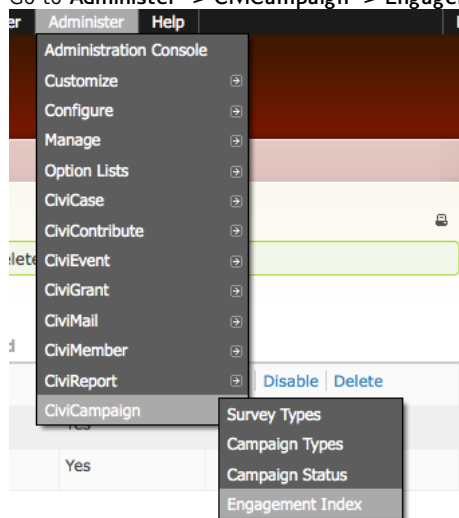
Access Keys: ⌘

ENGAGEMENT INDEX

CiviCampaign allows you to track an individual's level of interest/engagement in a particular activity. The Engagement Index can be recorded for general activities or actions, i.e. Send an Email, Meeting, Phone Call, Interview, and any additional custom activities/actions you create. To find out more about how to record an activity to an individual, see [Contacts in the Organising Your Data](#) section.

To configure the Engagement Index:

1. Go to **Administer -> CiviCampaign -> Engagement Index**.



2. Configure the engagement index as a number, e.g. 1 is a high level of engagement, and 5 is low level of engagement.

This information can supplement your outreach employees' or organizers' assessment of member engagement/interest in your organization.

Engagement Index Options

The existing option choices for Engagement Index group are listed below. You can add, edit or delete them from this screen.

[Add Engagement Index](#)

Label	Value	Description	Order	Reserved	Enabled?	
1	1		↓ ↑	No	Yes	Edit Disable Delete
2	2		↑ ↓	No	Yes	Edit Disable Delete
3	3		↑ ↓	No	Yes	Edit Disable Delete
4	4		↑ ↓	No	Yes	Edit Disable Delete
5	5		↑	No	Yes	Edit Disable Delete

[Add Engagement Index](#)

57. EVERYDAY TASKS

This chapter describes everyday tasks related to managing campaigns with CiviCampaign.

MANAGING CAMPAIGNS

The Campaign Dashboard allows you to create, configure, manage and view your campaigns. You can also manage surveys and petitions via the Campaign Dashboard (refer to the following chapters on Surveys and Petitions for specific information).

To view the Campaign Dashboard, go to **Campaigns > Dashboard > Campaigns**.

Campaign Dashboard

[Campaigns](#) [Surveys](#) [Petitions](#)

Add Campaign

Search Campaigns

Title	Description	Start Date	End Date	Type	Status	Active?	
Fall Fundraising Campaign		August 25th, 2011 11:29 AM	October 15th, 2011 12:00 AM	Direct Mail		Yes	Edit Disable Delete

Showing 1 to 1 of 1 entries

[First](#) [Previous](#) [1](#) [Next](#) [Last](#)

From the Campaign Dashboard, you can then Edit, Disable and Delete existing campaigns, and create new campaigns.

CREATE A NEW CAMPAIGN

To create a Campaign:

1. Go to **Campaign > New Campaign**.

The screenshot shows the 'New Campaign' form in a web application. At the top, there are three buttons: 'Save', 'Save and New', and 'Cancel'. Below these are several input fields and controls:

- Title**: A text input field with a red asterisk indicating it is required.
- Campaign Type**: A dropdown menu with '- select -' as the current selection.
- Description**: A large text area for entering the campaign description.
- Include Group(s)**: A list box containing 'Administrators', 'Advisory Board', 'Case Resources', 'Import Test - Failure', and 'Important People'. To the right are 'Add >>' and '<< Remove' buttons.
- Start Date**: A date picker set to '08/24/2011' and a time picker set to '12:30PM', both with '(clear)' links.
- End Date**: A date picker and a time picker, both empty with '(clear)' links.
- Campaign Status**: A dropdown menu with '- select -' as the current selection.
- Campaign Goals**: A rich text editor with a toolbar containing various icons for text formatting and insertion.
- Revenue Goal**: A text input field.
- External ID**: A text input field.
- Is Active?**: A checkbox that is currently checked.

At the bottom of the form, there are three buttons: 'Save', 'Save and New', and 'Cancel'.

2. Enter information about your campaign:

- **Title** (required): enter a unique name that describes your campaign. It's helpful to establish a naming convention for new campaigns so they alphabetize in drop-down lists automatically and are easy to sort through when associating and activity with the campaign.
- **Campaign Type** (required): select the type of campaign, e.g. Constituent Engagement. To add more options to the Campaign Type drop-down list, see the previous chapter on setting up CiviCampaign.
- **Description**: enter text that describes your campaign.
- **Include group(s)**: if appropriate, select the group that contains the individuals you are targeting for this campaign. To find out more about creating groups, see the chapter on Tags and Groups.
- **Start Date & Time** (required): enter the start date and time of the campaign
- **End Date & Time**: enter the end date and time of the campaign. If these fields are empty, then the campaign will be considered ongoing.
- **Campaign Status**: select the status of the campaign, e.g. In Progress, Planned, etc. To add more options to the Campaign Status drop-down list, see the previous chapter on setting up CiviCampaign.
- **Campaign Goals**: enter text that describes the goals and/or objectives of your campaign. You may also want to describe the activities you plan on conducting to meet those goals.
- **Revenue Goals**: if applicable, enter a number that indicates the amount you plan to raise during your campaign.
- **External ID**: if you want to track the campaign ID of the campaign when it existed in another database, you can enter the ID number of your legacy campaign.
- **Is Active?**: check the box if the campaign is an active campaign. If the campaign is inactive, then uncheck the box.

Click **Save**, to save the campaign.

TARGETING CONSTITUENTS: CREATE A GROUP

You may want to target a specific group of individuals for all campaign activities. This is done by creating a group to target these individuals. See the chapter Tags and Groups for more information about how to create a group.

SEND A MASS MAILING

A mass mailing to your target audience can generate interest and participation, and also be used to call for donations.

1. Create the email using CiviMail. See the Email section of this book to learn more about configuring and using CiviMail.
2. Select the appropriate campaign from the drop-down list when setting up the mailing.

A CAMPAIGN EVENT

Events created using CiviEvent can be associated with a campaign. To find out more about configuring and using CiviEvent, see the Events section of this book.

1. Create and configure the event.
2. Select the appropriate campaign from the drop-down list when setting up a mailing for the event.
3. Send a mass email using CiviMail to your target audience using a group or groups, and ask people to register for the event.
4. Again, select the name of the campaign on the mailing set-up.
5. Search for individuals who have indicated they want to register for the event.

RECORD CAMPAIGN CONTRIBUTIONS

As contributions come in, either online or offline, they can be associated with a campaign; simply select the appropriate campaign from the dropdown menu when recording the contribution.

To find out more about configuring and using CiviContribute, see Contributions section.

RECORD EVENT PARTICIPATION

During and after an event, organizers can record who participated by either collecting sign-in sheets and entering the participants manually, or recording who participated directly online.

Have participants write their contact information on sign-in sheets when they arrive, or if you have an internet connection at the event venue you may be able to enter participants directly into the database.

To find out more about how to record participant information for an event, see the Events section.

58. REPORTS AND ANALYSIS

There are a few searching and reporting tools at your disposal to report and analyse your campaigns.

CAMPAIGN SEARCHES

All searches for components that can be part of a campaign have a campaign filter so that you can search for events, contributions, etc. based on campaign. Similarly the tabs for components in advanced search also have a campaign filter so you can search for contacts based on their participation in campaigns.

CAMPAIGN REPORTS

The most useful report in CiviCRM for campaign analysis is the activity report. The activity report can be configured to show the campaign that this activity was part of and also the engagement index for the activity. The activity report can also filter by campaign.

SURVEY

59. WHAT IS SURVEY?

60. WHAT YOU NEED TO KNOW

61. SET-UP

62. EVERYDAY TASKS

63. REPORTS AND ANALYSIS

59. WHAT IS SURVEY?

CiviCampaign has a feature that enhances offline surveys by providing a standardised way to record survey responses and generate reports from the data. Survey responses are captured in an activity record (in an activity of the type Survey) for each individual.

Note that the Survey feature is used to record responses from your existing contacts. If you want to gather responses from individuals who may not exist in your database, you should use CiviCampaign's Petition feature; see the Petition section for more information.

For Drupal sites only, CiviCampaign interacts with the Drupal module CiviEngage to automatically provide additional options for your surveys; see the section Civic Engagement for more information.

SCENARIO: PUBLIC HOUSING SURVEY

Toft Organisation For Tenants (TOFT) focuses on protecting tenants' rights and lobbying for affordable housing. The organisation wanted to gather information about the housing conditions in one particular neighborhood to gain a better understanding of the scale of the issues and which of them were most pressing for this community. They decided that one strategy would be to undertake a survey to capture basic information about housing conditions and complaints about landlords. A focus group met to determine what questions and who should be asked.

A TOFT staff member then created a new survey in CiviCRM and built the list of respondents from the existing contacts. She generated and printed a walk list report, which was given to the volunteers who would carry out the survey.

Over the period of a week, a team of volunteers visited selected public housing buildings to interview the respondents and record their responses on the walk list. At the end of each day, the volunteers entered the responses of each individual into the CiviCRM database; some were able to do this from their home computers, while others returned to TOFT's office and used computers there.

At the conclusion of the survey, the programme leader used CiviCRM to search activities for the group of individuals who were surveyed, and generated reports to analyse the responses and inform the next strategy for their campaign. The results of the survey were also used to frame their messages and communications about the issues that were affecting the neighborhood.

60. WHAT YOU NEED TO KNOW

The following concepts and questions will help you to get the most out of using the survey tool in CiviCampaign.

KEY CONCEPTS

These concepts are not about creating and undertaking surveys in general, but about the specific use of the survey tool in CiviCampaign.

Custom Fields and Profiles

CiviCampaign surveys use custom profiles to capture survey participants' responses. Once you've decided on your questions and the types of responses, you need to create a custom field set for the questions and responses, and create option values if you're collecting multiple choice responses. You can then create the custom profile that will display the appropriate fields to enter the responses to the survey questions.

To learn more about how to create custom field sets, see the chapter called Custom Fields in the section Organising Your Data. To learn how to create a custom profile, see the chapter Profiles in the same section.

Reserving and releasing respondents

Before you can capture responses to your survey, you need to create a group made up of the contacts you are seeking responses from. This could be an existing group within your contacts, or you may need to create a group specifically for the survey. Survey describes this process as reserving respondents. When the contact has completed the survey and their data recorded, they are released from this group.

You can learn more about creating groups in the chapter Groups and Tags in the section Organising Your Data.

Surveys are designed to capture responses from existing contacts; if you are seeking responses from the wider public, use the Petition tool; see the Petitions section for information on this.

CiviCampaign and CiviEngage

Surveys are part of the functionality of the CiviCampaign component, so you must have this enabled in order to use surveys; however, you can create surveys that are not connected to a specific campaign. For example, an organisation may wish to conduct a membership satisfaction service to assess the performance of their own service, without having it associated with a campaign.

See the Campaigns section for information about setting up CiviCampaign.

Drupal sites with the module CiviEngage enabled, will have additional result set options profiles that configure surveys to allow you to track the status of responses to the survey. To find out more about how CiviEngage enhances the Survey feature, see the section called Civic Engagement.

Drupal Permissions

If you are using Drupal, you need to set permissions to allow specific roles to Reserve Campaign Contacts and Release Campaign Contacts when conducting the surveys. To learn more about setting Drupal permissions, go to the Drupal documentation at <http://drupal.org/getting-started/6/admin/user/permissions>.

KEY QUESTIONS

- Is the survey part of a campaign? When creating a survey, you don't have to connect it to a specific campaign; a general survey may be used for any programme in your organisation. But if you are using surveys as a particular strategy within a campaign, connecting the survey to the campaign will enable you to analyse the survey along with other strategies and activities related to this campaign.
- Think about the specific questions and types of responses you want to gather. Do you want to standard set of responses to make it easier to analyse results to specific questions, e.g. Yes, No, Undecided, Declined? Or is an open-ended question more appropriate, to allow the individual to provide you with a narrative?
- How many questions do you need to ask? If it is more than one, you will need to create custom fields; if it is more than three, consider using Petition instead of Survey.
- Who will conduct the survey, and how will the data be entered into CiviCRM?
- What group of your constituents do you want to survey?

61. SET-UP

This chapter describes the steps to set up surveys. If you are connecting a survey to a specific campaign, you will want to review the Campaigns section as well.

CREATE A NEW SURVEY

1. Go to **Campaigns > New Survey**.
2. Enter a Title for your survey and select the appropriate appropriate activity type.
3. If the survey is part of a campaign, select the campaign from the dropdown menu.
4. If you are using a custom profile for the survey, select if from the dropdown menu.
5. Enter other relevant information on the form.
6. Click **Save**, or **Save and New** if you want to create another survey.

Your survey will now appear in the summary on the Survey Dashboard. Use the links to the right of each survey to manage the survey.

CREATE A SURVEY WITH MULTIPLE QUESTIONS

In its default configuration, the survey feature allows you to capture responses to a *single* question; but often you will want to ask more than one question.

For example, the public housing survey had three questions. First, the TOFT staff member planned the questions to be asked and the standard responses to a couple of the questions: Yes, No, Undecided, Declined, and Not Applicable. She then created a custom data set to hold the questions and responses to the survey.

Tips:

- If you plan on conducting many surveys throughout the year (let's say 20 - 30 surveys in a year) with only a few questions per survey (let's say 3-4 questions per survey), then we strongly suggest that you create ONE custom data set that includes all the questions for each of the survey. Then you can create individual custom profiles for each survey that pull in the questions that are particular to that survey.
- If you plan on conducting just a few surveys per year (let's say about 3-4 surveys per year) with the number of questions no more than 10 per survey, then we suggest that you create different custom data sets for each group of questions per survey. Then you can use custom profiles to pull in the questions that are particular to a survey.

Once you have determined your survey questions and responses, the next step is to create the custom data fields:

1. Create a custom data field set by going to **Administer > Customize > Custom Data** and clicking on **Add a Set of Custom Fields**.
2. Create the custom data set so that it will be **Used For** field select **Activities** of type **Survey** and include the questions as the field labels and the option values as the responses
3. Enter any help text that you wish to provide and click **Save** to create the field set for the responses.
4. Create the custom profile that will pull in the fields of questions from your custom data set for the survey.

To learn more about how to create custom field sets, see the chapter called Creating Custom Fields in Your Data and CiviCRM. To learn about how to create a custom profile see the chapter Profiles in the in the CiviCRM Core Concepts section.

Now you are ready to create the new survey:

1. Go to **Campaign > New Survey** and enter the following settings (this example uses the TOFT scenario, where the survey was part of a larger campaign called Demand Affordable Public Housing):

- **Title (required):** enter **Public Housing Survey**.
- **Campaign:** select **Demand Affordable Public Housing Campaign** (to learn how to create a campaign, see the section called Campaign).
- **Activity Type (required):** select **Survey**.
- **Profile:** select **Survey Response Profile** so that the three responses to the survey questions can be collected for the survey.
- **Survey Result (required):** if you have created an earlier survey with a survey Result Set you want to use again, select the appropriate Result Set. Otherwise, click **Create a new result set** and enter the status results you want to track for responses to the survey, for example:
 - For Labels: Completed, Not Home, Moved, Wrong Address, Deceased
 - For Values, enter respectively: C, NH, MV, WA, DE

Once you create a new result set, CiviCRM creates the name for the result set with the following naming convention: Title of the survey and Result Set.

New Survey

Save Save and New Cancel

Title * Public Housing Survey
Title of the survey.

Campaign Demand Fair Public Housing Campaign
Select the campaign for which survey is created.

Activity Type * Survey
Select the Activity Type.

Profile Public Housing survey profile
Select the Profile for Survey.

Survey Responses * ☒ Create a new result set
☐ Use existing result set
You can create new result options for this survey, or select an existing survey result set which you've already created for another survey.

Result Options

Enter up to ten (10) multiple choice options in this table (click 'another choice' for each additional choice). You can use existing result set options by selecting survey result set.

Default	Label	Value	Recontact Interval	Weight
☐	Completed	C		1
☒	Not Home	NH		2
☐	Moved	MV		3
☐	Wrong Address	WA		4
☐	Wrong Number	WN		5
☐	Deceased	DE		6

[▶ another choice](#)

Instructions for interviewers

Source

body p

Maximum reserved at one time
Maximum number of contacts that can be reserved for an interviewer at one time.

Total reserved per interviewer
Maximum total number of contacts that can be in a reserved state for an interviewer.

Release frequency
Reserved respondents are released if they haven't been surveyed within this number of days. The Respondent Processor script must be run periodically to release respondents. ([learn more...](#))

Active? ☒
Is this survey active?

Default? ☒
Is this the default survey?

Save Save and New Cancel

- **Instructions for Interviews:** enter any appropriate information about the survey that would be helpful for the volunteers conducting the survey.
- **Maximum Reserved at one time:** enter the maximum number of contacts that can be reserved at any one time to be interviewed. This allows you to divide up the group of individuals for each volunteer to interview at one time.
- **Total reserved per interview:** enter the total number of contacts that can be reserved by any interviewer.
- **Release frequency:** enter the number of days that reserved respondents are released if they have not been surveyed within that time.
- **Active?:** check the box to make the survey active.
- **Default?:** check the box to make survey.

Click **Save**, or **Save and New** if you are creating several surveys. When you return to the Survey Dashboard you will see your new survey in the summary table.

SURVEY TYPES

You can create new survey types to describe the type of activity you are conducting. Survey responses will be recorded in an activity record for an individual. The default CiviCRM survey types are Survey, Canvass, PhoneBank, WalkList, and Petition.

To create or edit survey types:

1. Go to **Administer > CiviCampaign > Survey Types**.

Survey Type Options

[+ Add Survey Type](#)

Label	Value	Description	Order	Reserved	Enabled?	
Survey	28		↓ ↑	Yes	Yes	Edit
Canvass	29		↕ ↑ ↓	Yes	Yes	Edit
PhoneBank	30		↕ ↑ ↓	Yes	Yes	Edit
WalkList	31		↕ ↑ ↓	Yes	Yes	Edit
Petition	32		↕ ↑	Yes	Yes	Edit

[+ Add Survey Type](#)

2. Click on **Add Survey Type** and complete the form.

The next time you create a new survey (or edit an existing one) you will find your new survey type available in the dropdown menu of survey activity types.

62. EVERYDAY TASKS

This chapter describes the everyday tasks for using the Survey feature.

MANAGING YOUR SURVEYS

To view and edit existing surveys, go to **Campaign > Dashboard > Surveys**. Here you will find a summary of your surveys.

Use the links at the right to manage existing surveys, or click **Add Survey** to create a new survey.

Campaign Dashboard

Campaigns

Surveys

Petitions

Add Survey

Search Surveys

Title	Campaign	Survey Type	Release Frequency	Reserve Each Time	Total Reserve	Default?	Active?					
Public Housing Survey	Demand Affordable Public Housing Campaign	Survey				✓	Yes	Result Set	Edit	Disable	Delete	more
Brooklyn Families	Fall Fundraising Campaign	WalkList					Yes	Result Set	Edit	Disable	Delete	more

Showing 1 to 2 of 2 entries

First

Previous

1

Next

Last

Reserving Respondents

Before conducting a survey, you need to determine the group of individuals you want to interview; in CiviCRM this is called reserving respondents.

The reserved group can be divided into smaller subsets, as this may be a more manageable number of contacts to interview within available time periods.

To learn more about how to create a group, see the chapter called Groups and Tags.

To reserve a group of respondents:

1. Go to **Campaigns > Reserve Respondents**.
2. From the **Survey** dropdown menu select the name of the survey (required).
3. From the **Group(s)** dropdown menu select the name of the group of the contacts to be interviewed.
4. You can enter additional criteria to limit your search to a geographic area, such as Street Address, Street Name, Street Unit, Street Number, City, Zip/Postal Code. (Note: CiviCRM will parse a street address into Street Name, Street Unit, Street Number - which is extremely useful if you're planning a large door-to-door canvass - only if you turn on address parsing by clicking on **Administer > Configure > Global Settings > Address Settings**, then in the **Address Editing** area, check the box for **Street Address Parsing**.)
5. Click **Search**.

Find Respondents To Reserve

Edit Search Criteria

Survey

Public Housing Survey

Contact Name

Street Address

Street Unit

Street Number

Search

Interviewer

test, test

Contact Type(s)

- select -

Group(s)

- select -

My Campaign Group

Street Name

City

Zip / Postal Code

On the Find Respondents to Reserve search results screen, select the contacts to be reserved for interviewing:

1. Select the individuals to be reserved for surveys by checking the individual contacts to be interviewed (or select all of the contacts by clicking the radio button for **All n records** (where *n* is the number of contacts found in the reserve respondents search).
2. Click **Go** to reserve the respondents.

Find Respondents To Reserve

[Edit Search Criteria](#)

69 Results Contacts IN My Campaign Group AND Group Status - "Added"

Select Records: ☐ All 69 records ☒ Selected records only

[Print](#) [Reserve Respondents](#) [Go](#)

Next > Last >> Respondents 1 - 50 of 69 Page 1 of 2 [Go](#)

☒	Contact Name	Street Number	Street Name	Street Address	City	Postal Code	State	Country	Email	Phone
☒	Adams, Alan	46	Martin Luther King	46D Martin Luther King Ln W	Amite	70422	LA	United States		97977306
☒	Adams, Bernard									
☒	Adams, Fraddie	879	Dowlen	879Z Dowlen Dr S	Concord	77850	TX	United States	adamsfraddie@npo.co.pl	
☒	Adams, Greg	213	Dowlen	213J Dowlen Ln SW	Scituate	02407	MA	United States	adamsgreg@aol.co.pl	22609613
☒	Adams, James	16	Beech	16P Beech Ln W	Peoria	61614	IL	United States		68393115
☒	Adams, John	186	Main	186Q Main Ln W	Jacksons Gap	36861	AL	United States		

On the Reserve Respondents screen, click **Reserve**.

Reserve Respondents

Add Respondent Reservation(s)

[Reserve](#) [Reserve and Interview](#) [Cancel](#)

Do you want to reserve respondents for 'Public Housing Survey' ?

Number of selected contacts: 74

[Add respondent\(s\) to a new group](#)

[Add respondent\(s\) to existing group\(s\)](#)

Administrators

Advisory Board

Case Resources

My Campaign Group

Newsletter Subscribers

[Reserve](#) [Reserve and Interview](#) [Cancel](#)

INTERVIEW RESPONDENTS

In our public housing survey scenario, the TOFT volunteers entered the data they had gathered each day directly into CiviCRM, using the following steps:

1. Click **Campaign > Interview Respondents**.
2. On the **Find Respondents to Interview** screen use the same criteria as for Reserve Respondents:
 - **Survey:** (required) select the name of the survey
 - **Group(s):** select the name of the group of the contacts to be interviewed
 - click **Search**.

1. On the search results screen, either select the individuals to record responses, or select **All n records** (where n is the number of contacts found in the reserve respondents search).
2. Click **Go** to record survey responses.

□

3. On the Record Survey Responses screen for each individual, record the responses to each of the three questions.
4. In the **Result** column, select the status of responses to the survey.
5. Click **Record Response**, then choose one of the following:
 - Click **Done** if you have finished recording the responses and return to the Find Respondents to Interview screen.
 - Click **Release Respondents** if you decide not to record responses for the contacts; then on the Release Respondents screen, click **Release Respondents** so they will no longer be reserved and another volunteer can reserve the contacts to be interviewed.
 - Click **Reserve More Respondents** to find more contacts to be interviewed.

Record Survey Responses

Reservation has been added for 10 Contact(s).

Click **record response** button to update values for each respondent as needed.
 Click **Release Respondents >>** button below to release any respondents for whom you haven't recorded a response.
 Click **Reserve More Respondents >>** button if you need to get more respondents to interview.

Show 10 entries

Search:

Name	Do you live in a public housing complex?	How long have you lived in your complex?	Do you think you receive fair public housing options	Note	Result	
Adams, Alan	Yes	at least 1 year	No		Completed	Update Response
Adams, Bernard	Yes	less than 3 years	No		Completed	Update Response
Adams, Fraddie	- select -	- select -	- select -		- select -	record response
Adams, Greg	- select -	- select -	- select -		- select -	record response
Adams, James	- select -	- select -	- select -		- select -	record response
Adams, John	- select -	- select -	- select -		- select -	record response
Adams, Kenneth	- select -	- select -	- select -		- select -	record response
Adams, Pat	- select -	- select -	- select -		- select -	record response

63. REPORTS AND ANALYSIS

You can use the Survey Report (Detail) to analyse the results of your surveys.

REVIEW SURVEY RESULTS IN A REPORT

After the week of surveys was complete, the TOFT staff reviewed the results of the survey by looking at the Survey Report, which was created and printed out using the following steps:

1. Go to **Reports > Create Reports from Templates > Survey Report (Detail)**.
2. In the **Display Columns** area under Report Criteria, check the boxes for **Survey Responses** and any thing else you want to view in the report, such as Street Number and Street Name.
3. In the **Group by Columns**, select the fields you want to group your information by, such as Street Name.

Survey Report (Detail) - Template

▼ Report Criteria

Display Columns

☐ Interviewer Name

[x] Respondent Name

☐ Phone ☒ Street Number ☒ Street Name ☒ Street Unit

☐ Postal Code ☐ City ☐ State/Province ☐ Country

☐ Email

☐ Survey ☒ Survey Responses [x] Survey Result

► Constituent Information

► Survey Responses

► Petition Questions

Group by Columns

☒ Street Name ☐ Odd / Even Street Number ☐ Most Important Issue ☐ Marital Status

☐ Marriage Date ☐ test date ☐ Survey Q1 Response ☐ Survey Q2 Response

☐ Survey Q3 Response ☐ Is City Council doing a good job in providing safe affordable housing? ☐ Do you want Updates about this Campaign?

Order by Columns

Column	Order	Create section header
Street Name	Ascending	☒
- none -	Ascending	☐

4. In **Set Filters** area, by Survey select the name of your survey, and in **Respondent Status** select **Interviewed**.

Set Filters

Interviewer Name	Is equal to	- any interviewer -
Respondent Name	Contains	
Street Number	Is less than or equal to	
Street Name	Contains	
Postal Code	Is less than or equal to	
City	Contains	
State/Province	Is one of	Acre Alagoas Amapa Amazonas
Country	Is one of	Brazil
Survey	Is one of	Fair Treatment Walklist Survey asdasd Public Housing Survey
Respondent Status	Is equal to	Interviewed

► Constituent Information

► Fair Treatment Walklist Questions and Responses

▼ Public Housing survey questions and responses

Do you live in a public housing complex?	Is one of	Yes No Undecided Declined
How long have you lived in your complex?	Is one of	Less than a year at least 1 year less than 3 years at least 3 years
Do you think you receive fair public housing options	Is one of	Yes No Undecided Declined

Preview Report

- 5. There will be another drop-down area that will be named after your custom data set of questions. You can select responses to questions to limit your report, for example to show all the "yes" responses one of your questions.
- 6. Click **Preview Report**.
- 7. In the **Survey Report (Detail) - Template** screen, you can view the results. You can also export the report information to a CSV file if you want more detailed reporting.

Survey Report (Detail) - Template

Report Criteria

Create Report

Print Preview

Preview PDF

Preview CSV

> Existing report(s) from this template

- select group -

Add these Contacts to Group

Grouping(s)

Street Name

Survey

Is Public Housing Survey

Respondent Status

Is equal to Interviewed

Respondent Name	Street Number	Street Name	Survey Result	Do you live in a public housing complex?	How long have you lived in your complex?	Do you think you receive fair public housing options
Adams, Bernard			Completed	Yes	Less than a year	No
Adams, James	16	Beech	Completed	Yes	at least 1 year	No
Adams, Greg	213	Dowlen	Completed	Yes	Less than a year	No
Adams, Fraddie	879	Dowlen	Completed	Yes	at least 3 years	No
Adams, John	186	Main	Completed	Yes	less than 3 years	Undecided
Adams, Kenneth	190	Maple	Completed	Yes	at least 1 year	No
Adams, Pat	491	Martin Luther King	Completed	Yes	at least 3 years	No
Adams, Alan	46	Martin Luther King	Completed	Yes	at least 1 year	No

Row(s) Listed 8

If you would like to see a formatted report with the cover sheet of questions and responses and the street names in ascending order (as you indicated in the survey responses area criteria) then click **Print Preview**.

Cover Sheet for Survey Report (Detail)

Result Set

Survey Title = Public Housing Survey

C = Completed

NH = Not Home

MV = Moved

WA = Wrong Address

WN = Wrong Number

DE = Deceased

Response Codes

Q1 = Do you live in a public housing complex?

Y = Yes

N = No

U = Undecided

D = Declined

NA = Not Applicable

Q2 = How long have you lived in your complex?

<1 = Less than a year

1+ = at least 1 year

<3 = less than 3 years

3+ = at least 3 years

Q3 = Do you think you receive fair public housing options

Y = Yes

N = No

U = Undecided

D = Declined

Survey Report (Detail)						September 20th, 2023 2:18:43M
Grouping(s)	Event Name					
Survey	Is Public Housing Survey					
Response Status	Is equal to Interviewed					
Response Name	Street Number	Street Name	Survey Result	Do you live in a public housing complex?	How long have you lived in your complex?	Do you think you receive fair public housing options
Address_Bernad		C	Y		<5	SI
Results Listed						1
VIEW RESULTS  4/6/2024						
Survey Report (Detail)						September 20th, 2023 2:18:43M
Grouping(s)	Event Name					
Survey	Is Public Housing Survey					
Response Status	Is equal to Interviewed					
Response Name	Street Number	Street Name	Survey Result	Do you live in a public housing complex?	How long have you lived in your complex?	Do you think you receive fair public housing options
Address_Jacobs	16	Dorinda C	Y		>=	SI
Results Listed						1
VIEW RESULTS  4/6/2024						
Survey Report (Detail)						September 20th, 2023 2:18:43M
Grouping(s)	Event Name					
Survey	Is Public Housing Survey					
Response Status	Is equal to Interviewed					
Response Name	Street Number	Street Name	Survey Result	Do you live in a public housing complex?	How long have you lived in your complex?	Do you think you receive fair public housing options
Address_Ong	213	Dorinda C	Y		<5	SI
Address_Fraselle	879	Dorinda C	Y		>=	SI
Results Listed						2

PETITION

64. WHAT IS A PETITION?

65. WHAT YOU NEED TO KNOW

66. SET-UP

67. EVERYDAY TASKS

68. REPORTS AND ANALYSIS

64. WHAT IS A PETITION?

CiviCampaign includes a function that lets you create a petition to publicly gather responses and information online.

Typically when we think of petitions, we think about individuals signing a petition for a particular cause that will then be presented to an elected official or for education about a specific issue. But petitions can also be used as an online surveys, to gather responses about questions and then allow the an organization to build support about their causes based on the analysis of the responses.

SCENARIO: CITY COUNCIL PETITION

Townsville Organisation for Tenants (TOFT) wanted to demonstrate to the Townsville City Council the public's dissatisfaction or satisfaction with the Council's work to provide safe public housing for the community. In order to do this, they created a petition that would gather responses to questions at the same time as gathering signatures. The results were then presented to the City Council.

A TOFT staff member used CiviCampaign to create the petition then sent it via email to all of their existing contacts. She linked the petition to the organization's web site so that the community could respond online, and worked with the Communications Director on various communication strategies to drive individuals to the web site to fill out the petition.

The petition also allowed respondents to elect if they wanted to receive ongoing email updates from TOFT about the campaign's progress throughout the year.

After the duration of the petition drive, the staff member compiled the electronic signatures and responses, created reports to analyse the results and then the organisation communicated the results to City Council. The results of the petition were also used to frame TOFT's messages and communicate their story to build interest about the campaign.

65. WHAT YOU NEED TO KNOW

The following concepts are important to understand before creating and using petitions, and the key questions will help you to plan your petition.

KEY CONCEPTS

Petitions are a function within the CiviCampaign component of CiviCRM. When an individual responds to a petition, an activity record of the type Petition is created that contains the individual's responses to the petition questions.

Petitions and campaigns

Petition is a feature of CiviCampaign; but a petition doesn't necessarily have to be connected to a specific campaign. For example, if the Toft Organisation For Tenants (TOFT) used a petition to assess members' satisfaction with TOFT's web site, it probably would not need to be connected to a campaign. But the petition described in the scenario in the previous chapter is part of TOFT's Demand for Better Housing campaign, which includes a survey and other activities. Connecting the petition to the campaign enabled the organisation's staff to analyse petition responses in the context of the other strategies and activities in the campaign.

Profiles and custom fields

Using petitions in CiviCRM requires setting up two profiles. One profile is to capture basic contact information, including email address. Capturing email addresses via petitions is necessary to validate and accurately count signatures. The other profile contains custom activity fields that hold the responses to the petition questions.

You will want prepare your questions and the standard responses, if any, you want to gather before creating your custom field sets and custom profiles.

To learn more about how to create custom field sets, see the chapter on Custom Fields in the section Organising Your Data. To learn how to create a custom profile, see Profiles in the section Organising your Data.

Drupal Permissions

If you are using Drupal, you need to set permissions to allow specific roles to Sign CiviCRM Petitions. To learn more about setting Drupal permissions, go to the Drupal documentation at <http://drupal.org/getting-started/6/admin/user/permissions>.

KEY QUESTIONS

Think about the online strategies you will use and consider these questions before creating your petition:

- Do you plan to send the petition via email?
- Will you link to the petition on your website for people to sign?
- Will you use other social media or offline strategies to drive people to your website to sign the petition?
- How will you frame your message so that people will want to sign your petition?
- What do you plan to do with the results from the petition?
- What follow-up activities are you planning to continue communicating and building a relationship with petition signers?

66. SET-UP

This chapter describes the steps needed to set up a petition.

The CiviCampaign component must be enabled before you can use Petition. See the section Campaign for information about this.

SET DRUPAL PERMISSIONS

For Drupal sites, you will need to set the appropriate Drupal permissions so that specific roles can sign the petition, particularly anonymous users if you're planning to make the petition public.

1. Go to Administer (in Drupal; if you don't see the Drupal Administration menu, then you have not got the appropriate permissions to do this).
2. Select **User Management > Permissions**.
3. Under **civicrm module** check the boxes: **Sign CiviCRM Petition**, **Profile Create**, and **Access all Custom Data**, for the roles you require. For example, if this is to be a public petition, you must check these boxes for anonymous users and authenticated users.

To learn more about setting Drupal permissions, go to the Drupal documentation at <http://drupal.org/getting-started/6/admin/user/permissions>.

CREATE TWO CUSTOM PROFILES

In order to create a new petition, you must create two custom profiles: one to capture the contact information of the signer, and the other to capture the responses to the petition questions. The responses to the petition questions are recorded in the activity record of type Petition for each individual who signs the petition.

1. Create a custom profile for the contact information you want to collect, such as First Name, Last Name, and Email. You may want to make some of these fields required so you capture enough information to communicate with signers at a later date. Note: you *must* collect at minimum an email address in the contact profile, because the Petition feature will send an email to the signer of the petition to prompt them to verify their email address. Only those verified email addresses can be counted.
2. Create a custom profile with custom fields to capture responses to the petition questions. When creating the custom field set, from the **Used For** dropdown menu select **Activities**, and for the activity type select **Petition**.

For both profiles, you may want to select the following settings in the **Advanced Setting** area:

- For **Drupal user account registration option?**, select the radio button for **No account create option** if you do not want all petition signers to have a Drupal account created.
- For **What to do upon duplicate match**, you can select the radio button for **Allow Duplicate Contact to be Created** if you don't want anonymous users to update an existing contact record's information; you will then need to periodically dedupe records.

To learn more about how to create custom field sets, see the chapter Custom Fields in the Organising Your Data section. To learn about how to create a custom profile, see the Profiles chapter.

CREATE A NEW PETITION

Once you have created the two profiles, you are ready to create a petition.

1. Go to **Campaigns > New Petition**, then enter the following information about your petition:

- **Petition Title** (required): enter the name of your petition.
 - **Introduction:** enter text describing what your petition is about. Potential signers will read this, so create a good message to encourage individuals to sign the petition.
 - **Campaign:** if your petition is one strategy or activity of a campaign, then select the name of the campaign.
 - **Contact Profile** (required): select the name of the profile that will collect the contact information of petition signers.
 - **Activity Profile:** select the name of the activity profile that will collect petition responses.
 - **Is Active?:** check this box to make your petition active.
 - **Is Default?:** check this box to make your petition default.
- Click **Save** to save the petition information.

□

67. EVERYDAY TASKS

This chapter describes the everyday tasks to conduct and manage petitions.

MANAGE YOUR PETITIONS

To view, manage and edit your petitions, click **Campaigns > Dashboard > Petitions**.

Campaign Dashboard

Campaigns

Surveys

Petitions

Add Petition

Search Petitions

Title	Campaign	Default?	Active?	
Safe Public Housing Petition	Demand Affordable Public Housing Campaign		Yes	Edit Disable more

Showing 1 to 1 of 1 entries

First

Previous

1

Next

Last

SEND OUT A PETITION FOR SIGNING

When your petition is ready, you will want to publicise the URL where people can sign it.

1. Go to **Campaigns > Dashboard > Petitions**.
2. Click **More > Sign** next to the name of your petition.
3. You will see your petition; copy the URL and use this link to email to your existing contacts, or add to your web site for individuals to sign your petition.

COLLECT RESPONSES ONLINE

Once you have publicised the URL for your petition, people will be able to complete the form, answer the questions and submit their response.

Safe Public Housing Petition

Tell the City Council how you think they're handling issues around Safe Public Housing.

First Name *

Regina

Last Name *

Porter

Email *

regina.porter@example.com

Please enter a valid email address. We will send you an email to verify your vote.

Is City Council doing a good job in providing safe affordable housing?

Yes

☒ No

Not Enough

Don't Know

Do you want Updates about this Campaign?

☒ Yes

☐ No

(clear)

Sign the Petition

After completing the form and clicking **Sign the Petition**, they will see the following message prompting them to check their email and verify their email address:

Thank You
STEP 2: Please Check Your Email

To complete and confirm your signature, please follow the activation instructions sent to the email address you provided.

IMPORTANT: Before we can add your signature, you must validate your email address by clicking on the activation link in the confirmation e-mail. Sometimes our confirmation emails get flagged as spam and are moved to your bulk folder.

If you haven't received an email within a few minutes, please check your spam folder.

COLLECT SIGNATURES

To view who has signed the petition:

1. Click **Campaign > Dashboard > Petitions**.
2. Click **More > Signatures** next to the name of your petition.
3. You can then choose to view the petition activity for an individual, or select contacts and perform activities such as sending an email to the contacts, or a batch update via profile.

Find Activities

Edit Search Criteria

6 Results

Survey - Safe Public Housing Petition ...AND...

Activity Type 'Petition'

Select Records:

All 6 records

Selected records only

Print

Send Email to Contacts

- actions -

Batch Update Activities Via Profile

Delete Activities

Export Activities

Send Email to Contacts

Go

Type	Created By	With	Assigned	Date	Status
Petition	Regina Porter	Porter, Regina	n/a	August 26th, 2011 10:42 AM	Completed View Edit more
Petition	Patrice Jimenez	Jimenez, Patrice	n/a	August 26th, 2011 1:45 AM	Scheduled View Edit more
Petition	Jamie McClelland	McClelland, Jamie	n/a	August 26th, 2011 1:44 AM	Scheduled View Edit more
Petition	Leeva Dent	Dent, Leeva	n/a	August 26th, 2011 1:44 AM	Scheduled View Edit more
Petition	Maxwell Williams	Williams, Maxwell	n/a	August 26th, 2011 1:43 AM	Scheduled View Edit more
Petition	Alice Aguilar	Aguilar, Alice	n/a	August 26th, 2011 1:23 PM	Scheduled View Edit more

REVIEW RESULTS WITH ACTIVITY REPORT

To review all or some of the results from a petition, use the Activity Report.

1. Go to **Reports > Create Reports from Templates > Activity Report**.
2. In the **Display Column** area, select any fields you would like to view on the report, such as Target Contact Email.
3. Expand the **Petition Questions** area and select the criteria you want to see, such as specific responses to a petition question.
4. Click **Preview Report** to view the results. You can also export the survey report information to a CSV file to do more detailed reporting of the results.

Activity Report - Template

▼ Report Criteria

Display Columns

☐ Source Contact Name

☒ Assignee Contact Name

☒ Target Contact Name

☐ Source Contact Email

☐ Assignee Contact Email

☒ Target Contact Email

☒ Activity Type

☒ Subject

☒ Activity Date

☒ Activity Status

☒ Survey Result

☐ Street Address

☐ Street Number

☐ Street Name

☐ Street Unit

☐ City

☐ Postal Code

☐ County

☐ County

☒ Country

► Survey Responses

▼ Petition Questions

☒ Is City Council doing a good job in providing safe affordable housing?

☒ Do you want Updates about this Campaign?

Group by Columns

☐ Source Contact

☐ Activity Date

☐ Activity Type

☐ Street Address

☐ City

☐ Postal Code

☐ County

☐ Country

Set Filters

Source Contact Name

Contains

Assignee Contact Name

Contains

Target Contact Name

Contains

Limit To Current User

Is equal to

No

Activity Date

This Month

Completed

Cancelled

Left Message

Survey Result

Contains

Street Number

Is less than or equal to

Street Name

Contains

Postal Code

Is less than or equal to

City

Contains

County

Is one of

Alameda

Contra Costa

Marin

San Francisco

County

Is one of

Alabama

Alaska

American Samoa

Arizona

Country

Is one of

United States

► Survey Responses

▼ Petition Questions

Is City Council doing a good job in providing safe affordable housing?

Is one of

Yes

No

Not Enough

Don't Know

Do you want Updates about this Campaign?

Is equal to

- select -

- select -

Yes

No

Preview Report

68. REPORTS AND ANALYSIS

There are a couple of simple tools to report and analyse petitions.

VIEW SIGNATORIES

To view who has signed the petition:

- 1. Click **Campaign > Dashboard > Petitions**.
- 2. Click **More > Signatures** next to the name of your petition.

REVIEW RESULTS WITH ACTIVITY REPORT

To review all or some of the results from a petition, use the Activity Report.

- 1. Go to **Reports > Create Reports from Templates > Activity Report**.
- 2. In **Display Column** area, select any fields you would like to view on the report, such as Target Contact Email.
- 3. Expand the **Petition Questions** area and select the criteria you want to see, such as specific responses to a petition question.
- 4. Click **Preview Report** to view the results. You can also export the survey report information to a CSV file to do more detailed reporting of the results.



□

GOTV VOTER TRACKING

69. WHAT IS GOTV (VOTER TRACKING)?

69. WHAT IS GOTV (VOTER TRACKING)?

CiviCampaign includes a "Get Out the Vote" GOTV (Voter Tracking) feature so you can indicate the contacts (who you have or plan to survey) who have voted at the polls.

You will need to enable the CiviCampaign component to be able to use GOTV (Voter Tracking). See the Campaign section for more information about CiviCampaign.

TRACKING CONTACTS WHO VOTED AT THE POLLS

Before you can use the GOTV (Voter Tracking) feature, you will need to have created a survey, create the group of contacts you plan on interviewing, and reserve respondents (reserve the contacts you want to interview) for that survey. To learn more about surveys and reserving respondents, refer to the section Surveys in this book.

To use the GOTV (Voter Tracking) feature:

- 1. Click **Campaigns > GOTV (Voter Tracking)**.
- 2. On the GOTV (Voter Tracking) search screen:
 - **Survey** (required): select the name of the survey you are using to survey your contacts
 - **Group(s)**: select the group of contacts whom you want to track who has voted
 - click **Search**.
- On the GOTV (Voter Tracking) screen:
 - Check box under the column **Voted?** next to the individual you know has voted at the polls
 - You can float your cursor over the "individual contact" icon next to a person's name to find out more information about that individual

ContactsContributionsEventsMailingsMembershipsCampaignsReportsAdministerHelp

Home > CiviCRM > Campaign Dashboard > Survey(s) > GOTV (Voter Tracking)

GOTV (Voter Tracking)

▸ Edit Search Criteria

Show 50 entries

FirstPrevious12345NextLast

Name	Street Address	Street Name	Street Number	Street Unit	Voted?
 BERARDINELLI, GARY	550 W CHALMERS AVE UNIT 141	W CHALMERS AVE	550	UNIT 141	☒
 BOWENS, BEVERLY	3039 CANFIELD RD APT 9	CANFIELD RD	3039	APT 9	☒
 CHISMAR, MICHAEL	3100 FLO LOR DR APT 9	FLO LOR DR	3100	APT 9	☒
 BOGOEFF, JAMES	3200 FLO LOR DR APT 8	FLO LOR DR	3200	APT 8	☒
 CORPENING, TONYIA	2204 CANFIELD RD APT 8	CANFIELD RD	2204	APT 8	☒
 COLLOVECCHIO, ARGENTINA	3330 FLO LOR DR APT 8	FLO LOR DR	3330	APT 8	☐
 CREATORE, RONALD	3360 FLO LOR DR APT 7	FLO LOR DR	3360	APT 7	☐
 CHRYSTAL, MARGARET	3000 FLO LOR DR APT 6	FLO LOR DR	3000	APT 6	☐
 BRIGHT, DOLORES	3009 CANFIELD RD APT 5	CANFIELD RD	3009	APT 5	☐
 ANDREWS, THOMAS	3370 FLO LOR DR APT 4	FLO LOR DR	3370	APT 4	☐
 BOONE, FREDERICK	840 W IANOLA AVE APT 4	W IANOLA AVE	840	APT 4	☐
 BOBISH, BETTY	3480 FLO LOR DR APT 3	FLO LOR DR	3480	APT 3	☐
 CARROLL, EDWARD	3989 S SCHENLEY AVE APT 3	S SCHENLEY AVE	3989	APT 3	☐
 BRACCO, JOSEPH	3200 FLO LOR DR APT 3	FLO LOR DR	3200	APT 3	☐
 COLPETRO, SHIRLEY	3460 FLORA LN APT 3	FLORA LN	3460	APT 3	☐
 CRAWFORD, CARL	3027 CANFIELD RD APT 3	CANFIELD RD	3027	APT 3	☐
 CAMERON, STEVE	3250 BRANDYWINE DR APT 259	BRANDYWINE DR	3250	APT 259	☐

CIVIC ENGAGEMENT

70. WHAT IS CIVIENGAGE?

71. WHAT YOU NEED TO KNOW

72. SET-UP

73. EVERYDAYTASKS

74. REPORTS AND ANALYSIS

70. WHAT IS CIVIENGAGE?

CiviEngage is a Drupal module that enhances CiviCRM's core functions for non-profits focused on community organising and civic engagement work. If your site is built with Joomla!, you cannot use CiviEngage.

CiviEngage was built to aid community organising, base-building and civic engagement specifically within the USA context. It provides tools for managing walk lists for door-to-door campaigns and call lists for phone banks, and tracking how constituents interact with your organisation and move through various activities with increasing involvement over time.

CiviEngage provides:

- a package of custom fields, reports and features to track the history of engagement, involvement, and activities of constituents over time. This package integrates with Campaigns and Surveys to provide walk lists and phone bank lists.
- a model of how to conceptualise and best organise information about individual constituents, organisations and methods of tracking their history of interaction.

CiviEngage enhances CiviCampaign, which you can read more about in the Campaign section.

SCENARIO: DIRECT ACTION

Townsville Organisation For Tenants (TOFT) focuses on affordable housing issues. To impact the decisions of the state legislators on an upcoming rent cap bill, TOFT made a decision to mobilise several hundred people for a direct action at the state capitol, but had only two weeks to do it. The organisers knew that the best way to contact their particular constituency was by phone and they wanted to know who would participate in the direct action so they could track each individual's involvement with the organisation over time.

First, TOFT organisers identified who they wanted to mobilise for direct action based on specific criteria and information they keep about their constituency, such as geographic location, issue interests, volunteer interests, leadership level, etc.

A programme leader then created a Direct Action event in CiviCRM, using CiviEvent, and added groups of individuals to the event.

Organisers called the list of possible participants from a phone bank list report (they could also have done this using a participant listing) and entered the results of each call, such as whether the person would attend, they reached a wrong number, or had to leave a message.

An organiser contacted each participant several times to ensure that they would attend the direct action, and recorded the responses each time. Most organisers reached out to possible participants up to three times to ensure their commitment to attending.

After the Direct Action event, TOFT staff were able to analyse how many people said they would attend, how many actually attended, and how effective their method of outreach was.

SCENARIO: CANVASSING

An organisation wanted to engage constituents based on what they learned from individual responses during a door-knock canvass related to the fair treatment of workers at the local car manufacturing factory. To find out more about how their constituencies feel about the treatment of workers and to see if they would like to help, organisers decided to do a door-knock canvass in several neighborhoods where they knew there was a high concentration of factory workers.

Staff first defined the target audience based on specific districts in a city and neighborhood where they knew that there was a high concentration of factory workers.

To track all their strategies and the people who have interacted with the organisation with relation to this particular campaign, the staff created a campaign in CiviCampaign. They then created a survey in Surveys to record the questions asked during the door-knock canvass.

Staff created an event in CiviEvent to capture who would be attending the direct action event at the capitol, identified the community leaders who could help bring more constituents to the event, and added them as volunteers for the event. So that these volunteers could collect responses from people they contacted, staff created a walk list report and distributed it to them.

Each volunteer canvasser visited the locations on the walk list and gathered the responses on their report. At the end of each day, other volunteers gathered the completed walk list reports, and entered the responses directly into CiviCRM.

After the canvass campaign, the programme leaders analysed all the responses to the canvass survey and used this information to determine their next strategy to engage their constituency in the issue.

Because the organisation was able track information at every step of this canvassing work, they achieved a clearer sense of what their factory worker constituents needs and wants. TOFT was then more prepared to develop targeted communications that spoke directly to the needs of this constituency.

Finally, the careful tracking and collecting of data will be used to inform next steps in their overall strategy to gain fair treatment for workers in the community. Collecting data in this way over time will give TOFT a better sense of whether they're able to move their constituents effectively and achieve impact with their approach.

71. WHAT YOU NEED TO KNOW

CiviEngage is designed to manage interactions with constituents that happen as part of an organisation's civic engagement and base-building work, such as canvassing and phone banking.

This chapter describes the concepts you need to understand to use CiviEngage effectively. Following key concepts, you will find key questions that will help you to model your universe of constituents using CiviEngage.

CiviEngage enhances the use of CiviCampaign, and they are designed to be used together. Read more about CiviCampaign in the Campaign section.

KEY CONCEPTS

Understanding the following concepts will enable you to use CiviEngage effectively.

CiviEngage and CiviCampaign

CiviEngage and CiviCampaign are tied closely together in that each provides features and custom data that work together to accomplish community organising activities. For example, you can:

- create and conduct surveys to capture responses during door-knocking canvasses (using walklists) and phonebanking from your target audience
- create and conduct a petition to capture more detailed responses
- create reports to analyse the responses from your constituency to help you determine the next strategies in a programme or campaign
- record an engagement index in an individual's activity record to gauge their level of interest or potential to be a highly active member or be easily mobilised for direct actions.

To learn more about CiviCampaign, refer to the Campaign section. There are also separate sections for Survey and Petition which should be read in conjunction with this section.

Custom Fields and Profiles

CiviEngage packages custom fields sets that help you to organise information about your constituents for civic engagement and community organising work. In this way, CiviEngage helps you to take advantage of features such as walk lists and phone bank lists for civic engagement work, and surveys to collect responses from your constituents. See the chapter Creating Custom Fields in the section Your Data and CiviCRM for more details about how to use custom fields sets and custom profiles.

Cleaning your Address Data

Cleaning your address data means standardising addresses to conform to the conventions defined by your postal address standards. Standardising how addresses are entered into CiviCRM will allow for more accurate search results when searching by address and is essential to generating accurate walk list reports. CiviCRM will parse addresses based on address standards.

To find out more about how address parsing is handled and used in CiviCRM, refer to the Address Settings subsection of the Installation & Basic Set-up chapter of this book. When adding or editing contacts you will be entering or editing address elements including street number, street name, and street unit according to these standards.

When planning to import pre-existing data into CiviCRM for use in CiviEngage it is essential that you clean up address data *before* importing.

Disabling versus Deleting CiviEngage Custom Data

If you decide you don't need to use or view particular custom groups, fields, or values, we strongly recommend that you disable the custom group, field, or value rather than delete it. Custom reports and searches rely on these custom fields, so deleting certain custom data could potentially break or at least cause problems for the reports and searches.

Working with Your Universe of Contacts

In preparing for a campaign, you will need to identify the audiences you will be targeting for your canvass or phone bank. CiviCRM uses Smart Groups and regular Groups as the mechanisms to target specific groups of contacts. Here are some examples of how you can use Smart Groups and regular Groups for targeting during your campaign:

- use Smart Groups to identify contacts you want to target based on specific criteria, such as voter demographics, issue interests, primary language spoken, etc.
- track voter demographics using the custom data group called Voter Info
- use Groups set up as mailing lists to identify contacts who want to subscribe to a particular newsletter or issue to send an email blast about your campaign
- use these Smart Groups and regular Groups to generate your walk list or phone bank list.

Learn more about working with Smart Groups and regular Groups in the Tags and Groups chapter of this book.

Working with Voter History

CiviEngage enables you to manage voter history and other voter information collected during a voter engagement, voter education or electoral cycle.

Many organisations have access to a voter file from which they manage all their voter engagement work outside of CiviCRM. Once the voter engagement or electoral campaign is over and voter information is updated with who voted and other demographics, organisations will often only want to keep information on the actual contacts they made during the campaign. In this case, only those selected records from the voter file and additional voter information, such as responses to specific electoral campaign questions, a voter ID, and their registered party can be imported and maintained in CiviCRM. These voter records then become contacts that organisers will continue to engage and target for their base-building efforts.

Custom Contact Subtypes

CiviEngage creates new contact subtypes for Individuals and Organisations:

- Individual Contact Subtypes:
 - Media Contact
 - Funder Contact
 - Elected Official
- Organisation Contact Subtypes:
 - Media Outlet
 - Foundation

These subtypes allow you to track specific contacts such as funders and foundations, media contacts and elected officials, and record tailored information for each one.

Funders and Foundations:

- Track due dates for grant proposals, letters of inquiries and reports by adding an activity to the funder's contact record and choosing from the Proposal, Letter of Inquiry, or Report activity types.
- Tailor information about an individual funder, such as their funding areas and issue interests by creating a new contact record with the individual contact subtype Funder Contact and using the Funder Info custom field set.
- Tailor information about a foundation (organisation record), such as their program areas for funding creating a new contact record with the organisation contact subtype Foundation and using the Grant Info custom field set.

Media Contacts and Media Outlets:

- Record which media contacts or outlets are interested in your organisation's issues, or have written articles about your work, and for identifying who to contact when you want to publicise the work the organisation is undertaking.
- Tailor information about an individual media contact or organisation, such as their media type (e.g. TV, Newspaper, Photographer, etc.), issue interests and area of operation (or beat) using the Media Info custom field set.

Elected Officials:

- Record who is an elected official in a specific district, and who to contact on their staff, such as the scheduler, or spokesperson.
- Tailor information about an individual elected official, such as their elected position and role, using the Elected Official Info custom field set; staffers and spokespeople for an elected official can also be entered with the Elected Official subtype.

See the next chapter, Set-up, for information about how to tailor subtypes.

KEY QUESTIONS

The following questions are designed to help you make best use of CiviEngage.

- Who are your organisation's constituents and what issues affect them?
- Who are other important individuals and organisations related to your work (such as community leaders, donors, elected officials, media contacts and funders)?
- What do you need to know about your constituents to create targeted communications and appeals to mobilise?
- Will you do voter engagement work and use the results to enhance your current contact data?

72. SET-UP

This chapter describes how to install CiviEngage and gives suggestions on how to use the custom field sets and profiles that it includes.

INSTALLING CIVIENGAGE

To install CiviEngage, which is a Drupal module, you will need Drupal Administrator permissions to:

- enable the CiviEngage component within the CiviCRM module in Drupal
- update the Permissions for the Administrator role to access **CivCRM_engage module** by checking the box for **access civiengage settings**.

Note that CiviEngage requires the component CiviCampaign to be enabled.

CIVIENGAGE CONTACT SUBTYPES

CiviEngage takes advantage of CiviCRM contact subtypes to expose custom field sets associated only with specific subtypes (see below for a description of the custom field sets). The following contact subtypes are created when you install CiviEngage:

Individual subtypes:

- **Media Contact:** will expose the custom field set, Media Info, containing information specific to media contacts, such as their media type (e.g. Newspaper, Radio, TV, etc.), their "beat" (area of operation) and media issue interests.
- **Elected Official:** will expose the custom field set, Elected Official Info, containing information specific to elected officials, such as their elected level (such as City Council or Senate) and the role (such as scheduler or spokesperson).
- **Funder Contact:** will expose the custom field set, Funder Info, containing information specific to funders, such as their programme areas and issue interests.

Organisation subtypes:

- **Media Outlet:** will expose the custom field set, Media Outlet Info, containing information about an outlet's type of media, such as TV, Radio, Wire, Newspaper, Magazine, etc.
- **Foundation:** will expose the custom field set, Grant Info, containing fields where you track information specific to grants, such as the average grant amount a foundation will give and funding areas the foundation is interested in.

MODIFYING THE CUSTOM FIELD SETS

When you install CiviEngage, a number of custom fields are automatically created. These fields are designed to support your community organising work. Most of these fields are multiple choice fields which have been pre-populated with sample options. Before you start using CiviEngage, you need to review and modify the supplied options to meet your needs.

Note that CiviEngage has been developed with the North American context; if your organisation operates outside the USA you may need to customise the language but most of the concepts will be similar and useful to your organisation.

We strongly suggest that you do not delete any custom fields or custom field sets, since other features such as reports and searches may rely on these fields; deleting fields could potentially break these and other CiviEngage features.

To review the custom field sets, go to **Administer > Customize > Custom Data** in the navigation menu.

Custom Data					
Custom data is stored in custom fields. Custom fields are organized into logically related custom data sets (e.g. Volunteer Info). Use custom fields to collect and store custom data which are not included in the standard CiviCRM forms. You can create one or many sets of custom fields. Learn more...					
Set	Enabled?	Used For	Type	Order	Style
Communication Details	Yes	All Contact Types	Any	↓ ↑	Inline View and Edit Custom Fields Preview more
Voter Info	Yes	Individual	Any	↑ ↓	Tab View and Edit Custom Fields Preview more
Constituent Info - Individuals	Yes	Individual	Any	↑ ↓	Inline View and Edit Custom Fields Preview more
Grassroots Info	Yes	Individual	Any	↑ ↓	Tab View and Edit Custom Fields Preview more
Constituent Info - Organizations	Yes	Organization	Any	↑ ↓	Inline View and Edit Custom Fields Preview more
Grant Info	Yes	Organization	Foundation	↑ ↓	Inline View and Edit Custom Fields Preview more
Proposal Info	Yes	Activities	Proposal	↑ ↓	Inline View and Edit Custom Fields Preview more
Participant Info	Yes	Participants	Any	↑ ↓	Inline View and Edit Custom Fields Preview more
Event Details	Yes	Events	Any	↑ ↓	Inline View and Edit Custom Fields Preview more
Organizational Details	Yes	Organization	Any	↑ ↓	Inline View and Edit Custom Fields Preview more
Demographics	Yes	Individual	Any	↑ ↓	Tab View and Edit Custom Fields Preview more
Media Outlet Info	Yes	Organization	Media Outlet	↑ ↓	Inline View and Edit Custom Fields Preview more
Media Info	Yes	Individual	Media Contact	↑ ↓	Inline View and Edit Custom Fields Preview more
Funder Info	Yes	Individual	Funder Contact	↑ ↓	Inline View and Edit Custom Fields Preview more
Elected Official Info	Yes	Individual	Elected Official	↑ ↓	Inline View and Edit Custom Fields Preview more

The following list describes each of the custom field sets provided by CiviEngage; the bulleted items are custom fields within those custom field sets. You should add, edit, or disable (we highly suggest that you do not delete) the available options for each custom field to make them better fit your organisation's needs.

To learn more about using custom fields sets, see the chapter [Creating Custom Fields](#) in the section [Your Data and CiviCRM](#).

Communications Details

This custom field set can be used to provide more details about when to best contact your constituents, if they have good addresses, email addresses, or phone numbers, and the reason why they don't want to be contacted by email, or phone, or mail.

- **Best Time to Contact:** indicate if the best time to contact your constituent is in the morning, afternoon, or evening.
- **Communication Status:** indicate if you have a bad email, bad address, or bad phone for the contact
- **Reason for Do Not Mail**
- **Reason for Do Not Phone**
- **Reason for Do Not Email**

Voter Info

This custom field set may be used to capture voter demographics about your constituents. You may also want to add specific local voter fields that apply to you.

- **State Voter ID**
- **Party Registration**
- **If Other Party:** use this field only if you don't want to add another option value in the Party Registration custom field
- **Precinct**
- **Ward**
- **State District**
- **City District**
- **Congressional District**
- **County Name**
- **Voter History:** A (Always votes), O (Occasionally votes), N (New Voter); you can add other values to describe how your constituents votes.

Constituent Info - Individuals

This custom field set may be used to describe additional information your individual contacts, such as how you want to classify your contacts for ease of searching and targeting form communications, which staff person is responsible for outreach to the individual, and how and when the individual was brought into your organisation.

- **Constituent Type:** This is a required field used to categorize the type of contact, such as Volunteer, Activist, Board Member, Donor, Ally, etc.
- **Other Name:** may be used to contain another name used by the contact, for e.g. an individual's name in chinese characters
- **Staff Responsible:** note that the values for this field are also used for Event Contact Person. Replace the sample names in the list with your staff, member or volunteer coordinators, and other folks that have individuals assigned to them.
- **Date Started:** may be used to indicate the date your constituent was brought in to your organisation.
- **How Started:** edit this list to fit the ways in which members are brought into your organisation.

Grassroots Info

This custom field set may be used to further capture information about how a constituent likes to engage with your organisation, the types of issues and volunteer activities they're interested in, their level of leadership, and their status as a member. These fields provide another way to categorise your constituents to better target your audience for outreach and communications.

- **Member Status:** three status choices of Active, Inactive and Deceased are included by default. Think about other member statuses that might work for your organization and add or remove as needed.
- **Leadership Level:** the default options for tracking an individual's leadership level within your organisation are 1-5. Change this to match however your organisation tracks this information.
- **Issue Interest:** this may be used to capture what issues your contacts are interested in. This custom field shares the same set of options as the Funding Areas (for organisations), Media Issue Interest and Funder Issue Interest fields. It is a list of issues that your organisation works on or tracks.
- **Volunteer Interests:** a list of volunteer activities that your members can take on.

Constituent Info - Organizations

This custom field set may be used to classify the type of organisational contact so that you can target your outreach and communications.

- **Constituent Type - Org:** this custom field is required and may be used to classify the type of organisation contact, such as Member Organisation, Affiliate Organisation, Business, Government.

Grant Info

This custom field set may be used to capture information about grants for a particular foundation. You can view and edit this custom field if you create an organisation contact with subtype Foundation.

- **Average Amount:** average dollar amount for grants
- **Funding Areas:** this custom field uses the same set of options for Issue Interest and Funder Issue Interest.
- **Requirements Notes**

Proposal Info

This custom field set may be used to capture information about grant proposals. You can add, view and edit information about proposals when you create an activity of type Proposal for either a funder contact (an individual contact with type Funder Contact) or for a foundation contact (an organisation contact with type Foundation).

- Ask Amount
- Proposal Status
- Amount to be Received
- Date to be Received
- Multiyear Grant
- Years

Participant Info

This custom field set, which is available when you create a participants for your events, may be used to capture information about participants to your events, such as if they need childcare or rides to and from the event. Organisers who contact potential participants multiple times before an event can also capture responses from participants to track over time if they were able to get their constituents to participate and how many contacts it takes to encourage them to come to the event.

- Childcare Needed
- Ride To
- Ride Back
- Invitation Date
- Invitation Response
- Second Call Date
- Second Call Response
- Reminder Date
- Reminder Response

Event Details

This custom field set is used to capture additional information about your event.

- Event Contact Person: also used for Staff Responsible. Add all appropriate people to this list.

Organizational Details

This custom field set may be used to store information that is specific to organisations.

- Rating: if you need to evaluate organisations in some way, change the options to reflect that.

Demographics

This custom field set may be used to capture demographic information about your constituents.

- Ethnicity
- Secondary Language

Media Outlet Info

This custom set is only applicable to the organization contacts with subtype Media Outlet.

- Media Type - Org: this custom field uses the same set of options as Media Type - Ind field - TV, Radio, Wire, Newspaper, Magazine, etc.

Media Info

This custom field set is only applicable to the individual contacts with subtype Media Contact.

- Media Type - Ind: this custom field uses the same set of options as Media Type - Org
- Beat: this refers to the general category of topics that a media contact covers, such as local government, education, neighborhoods, religion, labor, etc.
- Media Issue Interest: uses the same option list as Issue Interest. As you come to know a reporter, you will learn the issues they are particularly interested in, even if it differs from their assigned beat.

Funder Info

This custom field set is only applicable to individual contacts with subtype Funder Contact and may be used to capture information specific to the funder contact.

- Funder Program Areas

- **Funder Issue Interest:** this custom field uses the same set of options as Issue Interest and Funding Areas.

Elected Official Info

This custom field set is only applicable to individual contacts with subtype Elected Official.

- **Elected Level:** the governmental body the individual is part of (City Council, state legislature, mayor, etc.)
- **Elected Staffer Role:** whether the contact is the elected official, or the official's staff, spokesperson, etc.

MODIFYING CIVIENGAGE'S CUSTOM VALUE OPTIONS

CiviEngage includes many custom fields with value options. The following are examples of value options that you may want to consider reviewing and modifying to match the kinds of information you need to track for your work.

To learn more about working with value options or multiple choice options, see the chapter called Creating Custom Fields.

Value Options for Issue Interests

The value options for Issue Interests contain issues that your organisation works on or tracks. They are included in CiviEngage as a single option list shared across multiple contexts:

- **Grassroots Info:** Issue Interests for individuals
- **Media Info:** Media Issue Interests for Media Contacts
- **Funder Info:** Funder Issue Interests for Funder Contacts
- **Grant Info:** Funding Areas for organisations

It is important to remember that despite appearing with different labels in these different contexts, you are still dealing with just one shared list of options.

In planning to use CiviEngage you should come up with a list of distinct issues that are important to your organisation and that you will want to utilise when tracking individuals' interest in your organisation's work, the issues that your media contacts may be interested in covering, a funders' general interests and the specific areas of work included in particular grants.

Value Options for Volunteer Interests

The value options for Volunteer Interests contain activities that your organisation's volunteers can take on and participate in; you can indicate each individual's interest in participating in these ways. They are included in CiviEngage as an option list. In planning to use CiviEngage you should establish a list of your organisation's current volunteer activities as well as any activities that you are planning to launch in the future. Some examples of volunteer interests are canvassing, phone banking and tabling.

Survey Default Result Set Options

When creating a new survey, especially when you have a survey with more than one question, CiviEngage defines a default set of Result Options that may be used to indicate if a survey has been completed or why the survey was not completed:

- label is Completed with value C
- label is Not Home with value NH
- label is Moved with value MV
- label is Wrong Address with value WA
- label is Wrong Number with value WN
- label is Deceased with value DE

We strongly suggest that you create labels with names that are descriptive, and for the values use abbreviated names so that when printing out WalkLists or PhoneBank reports using the Survey Report, the code or value is displayed to keep your report neat and easy to look at for recording responses.

CUSTOM PROFILES

CiviEngage creates several custom profiles for easier batch updating of individual or organisation information, such as voter demographics, issue interests, volunteer interests or event participant information. To learn more about profiles, please refer to the chapter called Profiles in the Core Functionality section.

SETTING UP SURVEYS FOR WALKLISTS AND PHONEBANKING

CiviEngage in combination with CiviCampaign allows you to easily set up your surveys for walklists during door-knocking canvasses and for phonebanking. You will want to think about the questions and responses you want to collect from your target audience in a manner that will be useful in analysing results from your efforts after you've conducted your canvass or phonebank.

There are a few steps to think about when creating your surveys (you can find out more about creating surveys in the Survey section of this book):

1. create your custom data set of questions and responses you plan to use for your survey if you plan to ask more than 1 question that extends Activities of type Walklist or Phonebank.
2. create the custom profile that includes the questions you will want to ask your audience.
Hint: If you plan on doing a phonebank and want to do the data entry directly into civicrm, then you may want to add the phone number in the profile, and set it to view only, so that you can see the phone numbers when you're interviewing the respondents. The profile will allow you to display (view only or you can edit data) other fields of information when you're ready to interview and enter the data.
3. create the group or smart group of the individual contacts you plan to survey, which is your target audience.
4. Make a decision if this survey is part of a larger campaign, and if so create the Campaign and indicate this campaign when creating the survey (you can find out more about create campaigns in the Campaigns section of this book).
5. When you create your survey, you can then:
 - indicate if the survey is for a walklist or phonebank
 - specify if the survey is part of a campaign
 - include the custom profile of the questions you plan to ask during the survey, if you plan on asking more than one question
 - use the Survey Default Result Set Options that's created by CiviEngage to help you track the status of the responses to the survey if appropriate.

Tips:

- If you plan on conducting many surveys throughout the year (let's say 20 - 30 surveys in a year) with only a few questions per survey (let's say 3-4 questions per survey), then we strongly suggest that you create ONE custom data set that includes all the questions for each of the survey. Then you can create individual custom profiles for each survey that pull in the questions that are particular to that survey.
- If you plan on conducting just a few surveys per year (let's say about 3-4 surveys per year) with the number of questions no more than 10 per survey, then we suggest that you create different custom data sets for each group of questions per survey. Then you can use custom profiles to pull in the questions that are particular to a survey.

Setting up custom data sets and profiles for use with Walklist or Phonebank Surveys

1. Create your custom data set to hold your questions (to learn more about creating custom data sets and fields, see the Organising Your Data section of this book).

For WalkList surveys:

- Create your custom data set for use with Activities of type Walklist

For PhoneBank surveys:

- Create your custom data set for use with Activities of type PhoneBank

Fair Treatment Walklist Questions and Responses	Yes	Activities	WalkList	↕ ↑ ↓ ±	Inline	View and Edit Custom Fields Preview more ▶
Affordable Housing Phonebank Questions and Responses	Yes	Activities	PhoneBank	↕ ↑	Inline	View and Edit Custom Fields Preview more ▶

[Add Set of Custom Fields](#)

2. Then for both Walklist or Phonebank surveys you can create the questions as the custom field labels and the responses you want to collect as the option values.

Home > CiviCRM > Administer CiviCRM > Custom Data

Affordable Housing Phonebank Questions and Responses - Custom Fields

Field Label	Data Type	Field Type	Order	Req?	Enabled?	
Do you live in an affordable housing complex?	Alphanumeric	Select	↓ ↓	No	Yes	Edit Field Edit Multiple Choice Options more ▶
Have you heard of landlord complaints?	Alphanumeric	Select	↕ ↑ ↓ ±	No	Yes	Edit Field Edit Multiple Choice Options more ▶
Have you had complaints about your landlord?	Alphanumeric	Select	↕ ↑ ↓ ±	No	Yes	Edit Field Edit Multiple Choice Options more ▶
How long have you lived in your building?	Alphanumeric	Select	↕ ↑	No	Yes	Edit Field Edit Multiple Choice Options more ▶

[Add Custom Field](#)

3. Next, create the custom profile that will pull in the questions for your survey (to learn more about creating profiles, see the Organising Your Data section of this book).

Home > CiviCRM > Administer CiviCRM > CiviCRM Profile

Affordable Housing Phonebank Survey Profile - CiviCRM Profile Fields

[Add Field](#) [Edit Settings](#) [Preview \(all fields\)](#)

Field Name	Visibility	Searchable?	In Selector?	Order	Active	Required	View Only	Reserved	
Do you live in an affordable housing complex? (Activity)	User and User Admin Only	No	No	↓ ↓	Yes	No	No	No	Edit Preview more ▶
Have you heard of landlord complaints? (Activity)	User and User Admin Only	No	No	↕ ↑ ↓ ±	Yes	No	No	No	Edit Preview more ▶
Have you had complaints about your landlord? (Activity)	User and User Admin Only	No	No	↕ ↑ ↓ ±	Yes	No	No	No	Edit Preview more ▶
How long have you lived in your building? (Activity)	User and User Admin Only	No	No	↕ ↑	Yes	No	No	No	Edit Preview more ▶

[Add Field](#) [Edit Settings](#) [Preview \(all fields\)](#)

73. EVERYDAY TASKS

This chapter provides instructions on how to do some of the common tasks using CiviEngage.

CONDUCTING A DOOR-KNOCK CANVASS

CiviEngage allows you to easily print walk lists for your volunteers or staff who are doing door-knocking activities and want to conduct a survey at the door.

Door-knocking canvass activities may be one strategic activity that's part of a larger campaign, so you may want to set up a Campaign if you haven't done so already. To learn more about working with campaigns and surveys, refer to the sections Campaign and Survey respectively. You will also want to review the previous chapter called Set-Up for CiviEngage to learn more about setting the custom data sets and profiles to be used in your Walklist survey.

Create the campaign and survey for the walk list

1. Create a new group of contacts that you will be targeting during your door-knock canvass. You may do this by searching for contacts who live in a particular geographic area or district. (To learn about working with groups, see the chapter Tags and Groups.)
2. To create a new Campaign (if you haven't already) go to **Campaigns > New Campaign**. Refer to the section Campaign for detailed instructions on how to create a campaign and add the group of contacts you created.
3. Go to **Campaigns > New Survey**; give the survey a title and select the appropriate campaign that it is part of.
4. From the **Activity Type** dropdown menu select **WalkList**.
5. From the **Profile** dropdown menu select the custom profile you created for use with this Walklist survey.
6. For **Survey Responses** select **Use existing result set** and select **Survey Default Results Set Options**.
7. Click **Save**.

Edit Survey

Save Save and New Cancel

Title * Fair Treatment Walklist Survey
Title of the survey.

Campaign Fair Treatment of Workers Campaign
Select the campaign for which survey is created.

Activity Type * WalkList
Select the Activity Type.

Profile Fair Treatment Walklist Survey Profile
Select the Profile for Survey.

Survey Responses * ☐ Create a new result set
☒ Use existing result set
You can create new result options for this survey, or select an existing survey result set which you've already created for another survey.

Select Result Set Survey Default Results Set Options

Result Options

Enter up to ten (10) multiple choice options in this table (click 'another choice' for each additional choice). You can use existing result set options by selecting survey result set.

Default	Label	Value	Recontact Interval	Weight
☐	Completed	C		1
▼ ☐	Not Home	NH		2
▼ ☐	Moved	MV		3
▼ ☐	Wrong Address	WA		4
▼ ☐	Wrong Number	WN		5
▼ ☐	Deceased	DE		6
▼ ☐				

▶ another choice

Instructions for interviewers

B I U Font Size A+ A- [Icons] Source [?] [?]

Maximum reserved at one time
Maximum number of contacts that can be reserved for an interviewer at one time.

Total reserved per interviewer
Maximum total number of contacts that can be in a reserved state for an interviewer.

Release frequency
Reserved respondents are released if they haven't been surveyed within this number of days. The Respondent Processor script must be run periodically to release respondents. ([learn more...](#))

Active? ☒
Is this survey active?

Default? ☒
Is this the default survey?

Save Save and New Cancel

Reserve the target group you want to survey

Next, you'll need to reserve the target group of contacts you will be surveying during the door-knock canvass:

1. Go to **Campaigns > Reserve Respondents** and select the appropriate survey.
2. Select your target group in **Group(s)**, then click **Search**.
3. On the **Find Respondents to Reserve** screen, select the contacts you want to survey.
4. Click **Go** to Reserve Respondents.
5. On the Reserve Respondents screen, click **Reserve**.

Create your WalkList report

1. Go to **Reports > Create Templates from Reports > Survey Report (Detail)**.
2. In the **Display Columns** area, check the boxes for: **Street Number, Street Name, Street Unit, Survey Responses**.
3. In the **Group By Columns** area, check the boxes for: **Street Name, Odd/Even Street Number**.
4. In the **Set Filters** area, select your survey name in **Survey**, and for **Respondent Status** select **Is Equal to** and **Reserved** from the dropdown menus.
5. Click **Preview Report**, then **Print Preview**.
6. Print your report. You will see that the print out includes a cover sheet with the response codes and that the report is sorted by street name and odd and even street numbers.

Cover Sheet for Survey Report (Detail)

Result Set

Survey Title = Fair Treatment Walklist Survey

C = Completed

NH = Not Home

MV = Moved

WA = Wrong Address

WN = Wrong Number

DE = Deceased

Response Codes

Q1 = Do you work at the Local Factory?

Y = Yes

N = No

U = Undecided

D = Declined

NA = Not Applicable

Q2 = Do you feel you are treated fairly as an employee?

Y = Yes

N = No

U = Undecided

D = Declined

NA = Not Applicable

Q3 = How long have you worked at the factory

<5 = Less than 5 years

5+ = At least 5 years

<10 = Less than 10 years

Survey Report (Detail)

Grouping(s)

Street Name & Odd/ Even Street Number

Survey

Is Fair Treatment Walklist Survey

Is equal to Reserved

September 20th, 2011 12:34 AM

Respondent Status

ALBISH, ANDREA

ALBISH, ANDREA

ALBISH, ANDREA

ALBISH, ANDREA

Street Number

3877

3877

3877

3877

Street Name Survey Result

BAYSTAR DR. C 1881 1877 N/A NEN DE

BAYSTAR DR. C 1881 1877 N/A NEN DE

BAYSTAR DR. C 1881 1877 N/A NEN DE

BAYSTAR DR. C 1881 1877 N/A NEN DE

Q1

T 3N U D NA

T 3N U D NA

T 3N U D NA

T 3N U D NA

Q2

T 3N U D NA

T 3N U D NA

T 3N U D NA

T 3N U D NA

Q3

<5 5+ <10 NA

<5 5+ <10 NA

<5 5+ <10 NA

<5 5+ <10 NA

Q4

T 3N U D NA

T 3N U D NA

T 3N U D NA

T 3N U D NA

Records Listed

4

Grouping(s)

Street Name & Odd/ Even Street Number

Survey

Is Fair Treatment Walklist Survey

Is equal to Reserved

September 20th, 2011 12:34 AM

Respondent Status

ADOLPH, CHARLES

Street Number

578

Street Name Survey Result

CORBASSET DR. C 1382 1377 N/A NEN DE

Q1

T 3N U D NA

Q2

T 3N U D NA

Q3

<5 5+ <10 NA

Q4

T 3N U D NA

Records Listed

1

Conduct your door-knock canvass

Your organisers and volunteers are now ready to door-knock and collect responses on their WalkList report sheets.

Recording responses from the canvass

At the end of each day or evening of canvassing, each organiser or volunteer can record the responses directly into CiviCRM.

1. Go to **Campaigns > Interview Respondents**.
2. Enter the name of your survey and the name of the target group you surveyed during the canvass; you may also enter the street name if you want to work with a smaller group of contacts to record responses.
3. On the **Find Respondents to Interview** screen, select the contacts for whom you want to record responses.
4. Click **Go**.
5. Enter the responses and results according to your WalkList sheet responses, then click **Record Response**.

281

Reviewing Results of the Survey

At the end of the canvass, a program lead may want to review the results of the survey. Refer to the chapter Reports and Analysis to learn how to view this report.

CONDUCTING A PHONEBANK

CiviEngage allows you to easily to enter responses from constituents during a PhoneBank directly into CiviCRM.

Phone banking activities may be one strategic activity within a larger campaign, so you will want to set up the Campaign if you haven't done so already. To learn more about working with campaigns and surveys, refer to the sections Campaign and Survey respectively. You will also want to review the the previous chapter called Set-Up for CiviEngage to learn more about setting the custom data sets and profiles to be used in your PhoneBank survey.

Create the campaign and survey for the PhoneBank

Creating a survey for phonebanking is the same process as creating a survey for walklists.

1. Create a new group of contacts that you will be targeting during your phone bank. To learn about working with groups, see the chapter Tags and Groups.
2. Create a new Campaign (if you haven't already) by going to **Campaigns > New Campaign**. Refer to the section Campaign to find out how to create a campaign and add the group of contacts you created.
3. Go to **Campaigns > Create New Survey** and create a new survey of type **PhoneBank**.
4. From the **Profile** dropdown menu select the custom profile you created for this phonebank survey.
5. For **Survey Responses** select **Use existing result set** and the set, **Survey Default Results Set Options**.
6. Click **Save**.

Reserve the target group you want to survey

Next, you'll need to reserve the target group of contacts you will be surveying during the phone bank:

1. Go to **Campaigns > Reserve Respondents**.
2. Select the name of your survey in **Survey** and your target group in **Group(s)**.
3. Click **Search**.
4. On the **Find Respondents to Reserve** screen, select the contacts you want to survey, then click **Go to Reserve Respondents**.
5. On the **Reserve Respondents** screen, click **Reserve**.

Conduct your phone bank and record responses

During the phone bank, organisers and volunteers can search for the group of contacts they will be calling and enter the responses directly into CiviCRM.

1. Go to **Campaigns > Interview Respondents**.
2. Enter the name of your survey and the name of the target group you surveyed during the phone bank.
3. On the **Find Respondents to Interview** screen, select the contacts whose responses you want to record, and click **Go**.
4. Enter the responses and results, then click **Record Response**.

Record PhoneBank Responses

Click **record response** button to update values for each respondent as needed.
Click **Release Respondents >>** button below to release any respondents for whom you haven't recorded a response.
Click **Reserve More Respondents >>** button if you need to get more respondents to interview.

Show **10** entries

Search:

Name	Do you live in an affordable housing complex?	Have you heard of landlord complaints?	Have you had complaints about your landlord?	How long have you lived in your building?	Note	Result	
ADAMS, CHARLES	Yes	Yes	Yes	Less than 1 year		Completed	Update Response
ADAMS, HEBEL	Yes	Yes	No	Less than 3 years		Completed	Update Response
ADAMS, JACQUELINE	Yes	Yes	Yes	At least 3 years		Completed	Update Response
ADAMS, MARK	- select -	- select -	- select -	- select -		- select -	record response
ADAMS, ROSILEE	- select -	- select -	- select -	- select -		- select -	record response
ADAMS, WILLIE	- select -	- select -	- select -	- select -		- select -	record response
ADOVASIO, LENA	- select -	- select -	- select -	- select -		- select -	record response
AGEE, LEONARD	- select -	- select -	- select -	- select -		- select -	record response
AI FSSI	- select -	- select -	- select -	- select -		- select -	record response

Reviewing Results of the Survey

At the end of the phone bank, a program lead may want to review the results of the survey. Refer to the chapter Reports and Analysis to learn how to view this report.

MOBILISING INDIVIDUALS TO A DIRECT ACTION EVENT

The Participant Info custom data group that comes with CiviEngage contains fields that hold information about prospective event participants, including a history of interactions between your organisation and prospective participants. Use this information (such as needs for childcare or rides) to bring these individuals to your events. Tracking the history of your organisation's contact with individuals around events such as an annual membership meeting, a direct action, or leadership training can help you to understand the effectiveness of your outreach methods and determine how committed or engaged an individual is based on if the individual actually attends events after multiple contacts.

This feature is mostly useful for organisers or staff who have a list of individuals they are recruiting to attend an event through multiple phone calls or face-to-face meetings. The following CiviCRM tasks could be used to mobilise individuals:

1. Conduct a basic or advanced search or use Groups and Smart Groups to create a list of the contacts you want to mobilize or invite to the event.
2. From the search results or Group Contacts screen, you can add the list of contacts to the event by selecting **Add Contacts to Events** from the actions list. To find out more about how to add contacts to events, refer to the Everyday Tasks chapter in the Events section in this book.
3. Once you have added the contacts to the event, you can enter participant information or responses from multiple interactions in the **Participant Info** area in a contact's participant record. You can either enter information for one participant by editing the participant record itself, or you can add information for a list of participants at one time. For example, if you plan to call through your list by viewing the participant list from the event listing, you could use **Batch Update Participants Via Profile** and select one of the following custom profiles provided by CiviEngage:
 - **Update Event Invite Responses** - to record responses from multiple contacts with the participant.
 - **Update Participant Info** - to record general information about participants, such as if they need childcare or rides to the event.

USING THE ENGAGEMENT INDEX

You can record the level of interest or engagement in a specific activity by of an individual contact. This allows you to then review an individual's activities to understand if their interests or engagement has increased over time, or give you the opportunity to have further contacts with the individual to increase their participation in your issues.

You can record an **Engagement Index** for the following activities or actions: **Phone Call**, **Meeting** or **Interview**.

1. From an Individual's contact record, click **Actions** then select an activity such as **Meeting**.
2. Fill out the information about the activity, then enter the **Engagement Index**. To find out how to create options for the Engagement Index, see the section called Campaign.

The screenshot shows the 'New Meeting' form in CiviCRM. At the top, it says 'Mrs Jane X Grant Sr' and 'New Meeting'. Below this are 'Save' and 'Cancel' buttons. The form fields include: 'Added By *' with the value 'demo@example.com'; 'With Contact' with a dropdown showing 'Grant, Jane'; 'Assigned To' with an empty dropdown; 'Subject' with the value 'Volunteer Individual Meeting'; 'Campaign' with a message: 'There are currently no active Campaigns. If you want to associate this record with a campaign, you can create a campaign here.'; 'Engagement Index' with a dropdown showing '2'; 'Location' with an empty text field; 'Date *' with the value '08/29/2011' and a calendar icon; 'Time' with the value '02:12PM' and a '(clear)' link; 'Duration' with the value '50' and a note 'Total time spent on this activity (in minutes)'; 'Status *' with a dropdown showing 'Completed'; and 'Details' with a rich text editor containing a toolbar with various icons like bold, italic, underline, font color, size, link, unlink, list, and image.

MANAGE VOTER INFORMATION

CiviEngage enables you to manage voter history and other voter information collected during a voter engagement, voter education or electoral cycle.

If you wish to collect voter contacts with their demographics, history and additional information and add them as contacts, or enhance your contact list with voter information, you can:

1. Export the contacts you want, including the the CiviCRM internal Contact ID, First name, Last name, address information, and any other contact information.
2. Upload the list into your voter management system and match to the voter records. You can then continue conducting your voter education and engagement activities there.
3. When the electoral cycle is over, export the contacts you want (new and existing), and import into CiviCRM. With the existing contacts, you'll be able to do an **update import** to match the contacts back into CiviCRM.
4. Use the **Voter Info** custom field set to capture your voter information related to the contact.

74. REPORTS AND ANALYSIS

Reports and Searches can be created with the default (or core) Report Templates and Searches in CiviCRM. This chapter will describe some of the reports that can be used with CiviEngage.

To learn more about how to work with Reports, see the section called "Reporting".

ANALYSING RESULTS FROM A DOOR-KNOCK CANVASS

To analyse responses from a survey used during a door-knock canvass, you may want to use the Survey Report that's part of the Campaign component.

1. After you have recorded responses from your contacts, Click on **Campaigns > Create Reports from Templates > Survey Report (Detail)**
2. In **Display Columns** area, check the boxes for: enter the information you'd like to display such as **Street Number, Street Name, Street Unit, Survey Responses**
3. In **Group By Columns** area if you'd like to group the responses, check the boxes for: **Street Name, Odd/Even Street Number**
4. In **Set Filters** area, select your survey name in Survey, and select for " Respondent Status" "Is Equal to" **Interview**.
5. Click Preview Report.
6. You can now review the results from the screen, or you can choose to export the the information to .CSV file to do further analysis and reporting

ANALYSING RESULTS FROM A PHONEBANK

To analyse responses from a phonebank, you may want to use the Survey Report that's part of the Campaign component.

1. After you have recorded responses from your contacts, Click on **Campaigns > Create Reports from Templates > Survey Report (Detail)**
2. In **Display Columns** area, check the boxes for: enter the information you'd like to display such, especially **Survey Responses**
3. In **Set Filters** area, select your survey name in Survey, and select for " Respondent Status" "Is Equal to" **Interview**.
4. Click **Preview Report**.
5. You can now review the results from the screen, or you can choose to export the the information to .CSV file to do further analysis and reporting.

GRANTS

75. WHAT IS CIVIGRANT?

76. WHAT YOU NEED TO KNOW

77. SET-UP

78. EVERY DAY TASKS

79. REPORTS AND ANALYSIS

75. WHAT IS CIVIGRANT?

CiviGrant is designed to be used by organisations that distribute funds to others, for example foundations, grant givers, etc.

In contrast to CiviContribute, which tracks money going *into* your organisation, CiviGrant tracks money going *out of* your organisation. CiviGrant has a data structure and workflows that support the grant application process with the ability to manage the amount applied for, amount received and any reports necessary for the process.

If you have a more complicated grant application process with multiple pathways, you may wish to consider using CiviGrant in conjunction with CiviCase.

SCENARIO: WOOKIE HOLE

Wookie Hole Community Action is a small umbrella organisation that distributes funds to support the annual Wookie Hole Community Festival held each year in Wookie Hole Cave.

They have a total grant pool of £40,000, which comes from local businesses and other grant giving organisations, that they make available each year to local organisations participating in the festival. Each organisation that applies for funds needs to complete an eligibility questionnaire, which is then entered into the applicant's contact record, and an application that details how they will spend the money, which they attach to the grant. As well as filling in certain fields for each grant, they also attach a read-only PDF copy of the original application form for future reference.

Ineligible applications are rejected and eligible applications are scored according to pre-defined criteria. The grant committee members then look at the total amount applied for by all applicants. If it is greater than £40,000, they look again at all eligible projects to decide which ones to fully or partially fund. CiviGrant has fields that they can use to store and search on this information.

Once the funds have been granted, the organisation uses CiviGrant in conjunction with CiviMail to solicit feedback and reports from all organisations that they have funded. Once the feedback is received they mark the grant as "feedback received". Multiple emails often have to be sent to organisations to get feedback. The organisation does this by using an email template and searching for all contacts who have successfully received a grant but not yet sent feedback.

Finally, once all reports are in, a staff member compiles a report and thank-you which they email to all organisations that gave funds toward the festival. The report details how their funds benefited the local community. Wookie Hole Community Action also prints a certificate for each local business and funder (directly from CiviCRM) which they can proudly display in their premises.

76. WHAT YOU NEED TO KNOW

CiviGrant is designed to help grant-giving organisations to manage this process. CiviGrant is one of the simpler CiviCRM components so if you are familiar with other CiviCRM components, you will probably find CiviGrant quite straightforward.

KEY CONCEPTS

An understanding of the following key concepts will help you to make the best use of CiviGrant.

CiviGrant workflow

The standard CiviGrant workflow starts with the details of the grant that a contact is applying for, including the amount applied for and when the application was received. You can then record the stages of the process including when the grant decision was made, how much was granted, when money was transferred, when the grant report was due and if it has been received.

Grant types

Use grant types to specify the different types of grant that your organisation distributes. You can set up as many grant types as you like, and you can also search based on grant type.

Grant statuses

CiviGrant comes with three default grant statuses: Pending, Granted and Rejected. You can add more grant statuses to match your workflow.

Application forms and eligibility criteria

You can create application processing forms and eligibility criteria in CiviGrant, using CiviCRM's custom data fields. Think about what fields should be attached to the *contact* who has applied for the grant, and what fields should be attached to the *grant*.

KEY QUESTIONS

Once you've familiarised yourself with the concepts outlined above, and before you begin to work with CiviGrant, answer the following questions:

- What grant types does your organisation offer?
- What is your grant application workflow and how can you map it to CiviGrant statuses?
- Do you have an application form, and if so, how can you model it using custom data?
- What kinds of reports do you want to generate from the grant process?

77. SET-UP

Set up of CiviGrant is reasonably straightforward. The first thing to do is to enable the CiviGrant module in **Administer > Global Settings > Enable Components**.

GRANT TYPES

Grant types are set up on the **Administer > CiviGrant > Grant types** screen. There isn't much to configure here, apart from a title and description of the grant.

At the moment, you cannot add custom data to grant types but you can add it to grants (see below).

Grant statuses

Grant statuses can be administered from the **Administer > Option lists > View all option lists** screen. Create the appropriate statuses to match your grant giving workflow.

CUSTOM DATA FOR GRANTS

You can add custom data to grants:

1. Go to **Administer > Customize > Custom data**.
2. Click on **Add new custom fields**.
3. Choose **Grant** as the record type.

Consider adding custom data fields to upload the original application form; these could be converted to PDF before uploading to make them read only and reasonably future compatible.

See the custom data chapter for more information on setting up custom data.

78. EVERY DAY TASKS

This section discusses the every day tasks associated with administering grants with CiviGrant.

CIVIGRANT DASHBOARD

Go to **Other > Grants > Dashboard** to access the CiviGrant Dashboard. Here you will see a summary of the grants registered in your CiviCRM database, and a table of recent grant recipients.

VIEWING GRANTS

There are a couple of ways to view grants:

- The **Grants dashboard** gives a summary of the status of all grants in your CiviCRM, grouped by grant type. It also gives an overview of recent grants.
- An individual contact's grants can be viewed from the **Grants** tab on their record.

ADDING AND EDITING GRANT RECIPIENTS

After Wookie Hole Community Action selected its grant recipients for the Cave Festival, their grant administrator looked up the contact record of each successful applicant and entered a new grant record for each one.

To add or edit grant recipients:

1. Go to **Other > Grants > New Grant**.
2. Either select an already existing contact or create a new contact to add the grant to.
3. Complete the details of the grant. Fill in as many details as possible, including any custom data that has been set up; but you can also edit and update the grant details at a later stage.
4. Click **Save**.

Grants can be edited and updated at any time using the edit link which appears in the grant record.

RECORDING REPORTS

When reports are received from grant recipients, you can edit the grant information (either from the CiviGrant dashboard or the contact's record). Check the **Grant Report Received?** box in the form and add any appropriate notes.

79. REPORTS AND ANALYSIS

There are a few techniques for reporting on and analysing grants. The grant dashboard gives a quick overview of your grant types. Aside from this there are

- The Find Grants search form
- The grants tab in advanced search
- The Grant report

SEARCHING FOR GRANT DATA

CiviCRM makes an important distinction between contacts and grants. Sometimes it is useful to get the answer to your grant related question in terms of contacts, e.g. which contacts were successful grant applicants in 2011. Other times it is more useful to have the answer in terms of grants, e.g. how many grants applications did we get for our Community Chest this year?

Think about whether you are interested in the grant or the contact before doing any grant searching.

The Find grants search allows you to search based on grant data and return grants. The Advanced search allows you to search based on most grant data and combine that with other contact information and return contacts.

Searching based on these criteria gives you access to simple totals. It also the option to export as CSV for further analysis.

GRANT REPORTS

Out of the box, CiviCRM comes with one report that can be used for Grants. This report can be used, for example to show details for all grants of a particular grant type. The report has aggregated statistics at the bottom for amount requested and granted.

MORE ANALYSIS

If you can't do what you want with a built in report or search, consider commissioning a new report or custom search. Read the CiviReport section for more information.

CIVICRM COMMUNITY

80. THE CIVICRM COMMUNITY

81. BUG REPORTING

82. LOCALISING CIVICRM

83. CONTRIBUTING TO THIS MANUAL

80. THE CIVICRM COMMUNITY

Like many open source projects, CiviCRM is shaped, guided, and driven by its community, a far-flung ecosystem of users, developers, and implementers who utilize CiviCRM in many different ways and bring to it a wide array of skills, experiences, and perspectives. These varied and diverse offerings are crucial to the continued success of CiviCRM, but they can move the project forward only if they find their way back into the public stream of discussion and collaboration. This chapter is a guide to finding and engaging in the community of people who are working together to make CiviCRM what it is and what it will become.

FINDING THE COMMUNITY ONLINE

As might be expected of a web-based software project, much of the CiviCRM community's activity occurs online. This means that if you have access to the Internet you also have access to and can participate in the CiviCRM community regardless of where you live or work. English is the predominant language for discussion and contributions.

The CiviCRM website itself (<http://civicrm.org>) is a good starting point for exploring and participating in the community. In addition to general information about getting and using CiviCRM, you'll find blog posts from community members, announcements about upcoming events, and a Participate section (<http://civicrm.org/participate>) that lists and links to many of the resources described below.

The CiviCRM Forums (<http://forum.civicrm.org>) are a central location for CiviCRM discussion and support. The forums are divided into topical boards for:

- Asking general questions
- Getting technical support for installing, upgrading, configuring, using, and customizing CiviCRM
- Discussing and providing feedback on documentation
- Feature requests and suggestions
- Projects in internationalisation and localisation
- Showcasing success stories and case studies
- Conversations around modifying and extending CiviCRM
- Coordination of testing
- Obtaining or providing professional services

Registration for the forums is completely free and most of the boards are very active with frequent new posts and responses.

Another great source of support and discussion is Internet Relay Chat (IRC). The #civicrm IRC channel is hosted by Freenode at <irc.freenode.net>. You can access the channel using an IRC client (a program that you run on your computer) or through the web interface at <http://webchat.freenode.net>. Enter #civicrm in the Channels field and a nickname of your choosing in the Nickname field. For more information on using IRC, check out the IRC section of the Drupal website (<http://drupal.org/irc>). Although the information is targeted to the Drupal community it can also be useful for CiviCRM users, especially because the Drupal IRC channels are also hosted on Freenode.

You'll hopefully find that both the forums and the IRC channel are great sources for help, support, and good ideas. That's all attributable to the good will and generous efforts of people like you! Everyone who visits the forums and the channel is encouraged to give back to the community by responding to questions and requests for help and contributing their own ideas and feedback to the conversations. And simply asking your own questions is also a significant contribution to the community. It's likely that someone else is having the same problems or wondering the same thing, and the responses you solicit help build the community's knowledge base.

The CiviCRM blog (<http://civicrm.org/blog>) is another good source of information and discussion. Blog posts are written by both the CiviCRM core team and other community members and cover a wide range of topics, including general news and announcements, upcoming events and accounts of events that have occurred, case studies, use cases and ways to get things done with CiviCRM, and new features and development. Comments are encouraged and can create lively discussions that can in turn direct future CiviCRM development. If you've got something that you'd like to post on the blog, we encourage you to write to info@civicrm.org with your ideas and your request to post.

Much discussion of CiviCRM also occurs outside of these official channels. Using your favorite engine to search for CiviCRM will turn up many articles and posts from other folks' websites and blogs. The CiviCRM team is good at keeping an eye out for these posts and often publicize them through Twitter. To keep abreast of the stream of comments, follow @civicrm and find CiviCRM tweets and tag your own tweets with the #civicrm hashtag.

FINDING THE COMMUNITY OFFLINE

Though the online community is both accessible and active, participating in the CiviCRM community offline can be even more rewarding and can help you connect with others in your area who are developing, implementing, and using CiviCRM.

Many cities and regions hold CiviCRM meetups where people gather to learn about CiviCRM, share new ideas, developments, and use cases, and meet other folks involved with the community. You can find out more about meetups at <http://civicrm.org>. Some meetup and local user groups (or LUGs) also maintain discussion boards at <http://civicrm.org/groups>. Contact the CiviCRM crew if you'd like a discussion board for your own group on the site.

CiviCRM recently held the first CiviCon conference in April 2010 in San Francisco. More are being planned, including one in Chicago in 2011. CiviCRM core developers and community members also make appearances at other conferences, including DrupalCon, the NonProfit Technology Conference, Joomla! events, and Aspiration Tech events.

CiviCRM also conducts user and developer training in cities around the globe. Check out <http://civicrm.org> for info about upcoming trainings and contact CiviCRM if you'd like to host trainings in your own area.

OPEN SOURCE = COMMUNITY SOURCED

Here are some additional ways that you can participate in and contribute to the CiviCRM community.

- Contribute to CiviCRM documentation. This book was written by community members; you can contribute to it by going to <http://en.flossmanuals.net/civicrm>, registering, and clicking "Edit this page" on the page you want to edit. You can also find and contribute to the CiviCRM documentation wiki at <http://wiki.civicrm.org/confluence/display/CRMDOC/CiviCRM+Documentation>.
- Share use cases and case studies that describe how your organization uses CiviCRM and the solutions and processes you've developed around the software. You can post your case studies to the CiviCRM Showcase on the Forums, post them on the Wiki at <http://wiki.civicrm.org/confluence/display/CRMDOC/Case+Studies>, or pitch them as posts for the CiviCRM blog.
- Share your training resources and materials with the rest of the community through the wiki, the forums, or blog posts on the CiviCRM blog or your own sites.
- Contribute code you've written to extend CiviCRM, because it's likely that someone else out there needs the same functionality. Check out the recommended steps for developing and contributing to the CiviCRM core codebase at <http://wiki.civicrm.org/confluence/x/kADNAQ>. If you've developed a Drupal module, you should contribute it to Drupal.org; see <http://drupal.org/node/7765> for more information on contributing modules. Joomla! extensions can be posted on <http://forge.joomla.org/>. Finally, you can post your code on the CiviCRM Forums or wiki as attachments.
- Sponsor development of new features. If your organization needs certain features or functionality that doesn't yet exist for CiviCRM and can't develop those features in-house, you can sponsor their development by outside coders and developers. This can be a solo effort on the part of one organization or a coordinated effort sponsored by multiple organizations in need of the same set of functionality. Refer to the wiki at <http://wiki.civicrm.org/confluence/display/CRM/Developing+with+the+CiviCRM+team> or write to info@civicrm.org for more information on sponsoring development.
- Report any bugs that you find in CiviCRM. See the Bug Reporting chapter of this book for more information.

81. BUG REPORTING

Like all software there will be times when you use CiviCRM when things don't work the way you expect them to.

A good first step is to search the forums (<http://forum.civicrm.org>) for similar problems and follow advice given there. If your problem hasn't been addressed, posting to the forum is probably the right thing to do.

Before posting it's a good idea to look on the forum for good posting guidelines and spend a bit of time writing your post. Make sure you are detailed and specific about what software you are using (i.e. the version of CiviCRM, which CMS platform and its version, and which browser and its version), what you are trying to do and how you are trying to do it. For example letting people know the url you are using (with any confidential details removed) may cause them to realise that you are configuring the wrong page. Unclear posts are less likely to get good replies.

USING OLDER VERSIONS OF CIVICRM

If you are using an older version and the problem you are experiencing is a bug that has been fixed in the latest release, be prepared for the answer "that it is time to upgrade to the latest version." Although the CiviCRM community tries to be as helpful as possible, and we recognize that upgrading puts a burden on your organisation, it is difficult to support multiple versions simultaneously.

WHAT CAUSES PROBLEMS WITH CIVICRM?

Check the following possible sources of problems before you report something on a forum. You can save yourself and a lot of people trouble by isolating the problem. CiviCRM forums try to be friendly and don't criticise you for misjudging a problem, but you'll certainly get more help and resolve problems faster by doing some checking of your own first.

- Misunderstanding the software - we don't claim our documentation is perfect. But please go back and check it very carefully when you hit a barrier. Frustration makes it hard to concentrate, so be sure to read slowly and thoroughly. Also remember that different parts of CiviCRM depend on each other, so check for problems in related modules, besides the one you think the problem is in.
- Your server set up - servers can be configured in many different ways, and these settings can change the way CiviCRM operates. Depending on your issue your server configuration may be causing you issues.
- Using older or unsupported versions of CiviCRM, PHP, and MySQL - older and unsupported versions of software related to CiviCRM will most like cause unpredictable errors, so it is always a good practice to use the latest stable version of software.
- Customisations made to the source code of your installation of CiviCRM - any changes made to the source code of CiviCRM may have unintended consequences. The community forums may be able to help you, but you will have to be patient, share source code, and try out suggestions. You may also want to check with your in-house development staff or outside consultant / service provider to determine whether CiviCRM has been customized in some way that might be related to the observed problem.
- Other newly installed and enabled modules or components - you may need to review the additional modules and components you have installed and enabled that are not usually included in the install package to ensure that you have the latest stable version as well as using a version of the module that works with your particular version of CiviCRM.
- Bugs in the version of CiviCRM you are using - after you have eliminated all the previous options, you can report your problem as a bug. In fact, we appreciate you doing this, because you are making CiviCRM better for everyone.

RECREATING YOUR PROBLEM ON THE DEMO SITE

Recreating your bug on one of the demo sites (<http://demo.civicrm.org> and select the demo site that matches your CiviCRM version) helps determine whether your problem is a result of a bug in the source code, or as a result of changes on your site. If you can show us that the code on the demo site turns up your bug, it's very likely that the CiviCRM source code is the problem, and your demonstration will help us find and fix it.

Still, no demo site can cover all possibilities. Issues involving email output or payment processing cannot be recreated on the demo sites. So even if you can't reproduce your bug there, it might still be a bug in CiviCRM. It is, however, probably triggered by your server setup or other customisations.

Write to the forum and explain the problem you are experiencing. If the bug was reproduced on the demo site, describe exactly what you did there, and copy the demo site's URLs to document the steps you used. If not, include as much information about your server setup as you feasibly can. Configuration files from the web server, CMS, and CiviCRM will be valuable, but be careful to not including sensitive information such as your database log-in.

If the forum suggests you discovered a bug in CiviCRM, you can report it to the CiviCRM issue tracker (<http://issues.civicrm.org/jira/browse/CRM>).

WRITING GOOD BUG REPORTS

The best bug reports give lots of background and context. Don't forget that the way you are using CiviCRM is most likely very specific to your organisation. The more background you can give on the bug, the better.

The best bug reports clearly state:

- What you did
- What you expected to happen
- What actually happened
- Version of CiviCRM (must be included)
- Which CMS platform and CMS version (must be included)
- Which browser and browser version (must be included)
- Version of PHP and MySQL
- Screen shots of the errors or issue
- History of the bug
- The recreatability of the bug (e.g. bug always happens, bug is reported by some but can't recreate it or not consistently, bug happens when using this browser but not another browser, etc.)

FIXING BUGS

The amount of time taken for the bug to be fixed depends on the severity and complexity of the bug. It could be as quick as the same day, but it could take much longer.

To get bug fixes, the easiest way is just to download and install the latest revision of CiviCRM. Downloading bug fixes between releases and fixing, called patching, your existing software is possible. If you have technical abilities, then refer to the CiviCRM Developer's Guide for instructions on applying a patch, otherwise, seek out technical assistance to provide tests and a patch for the issue.

82. LOCALISING CIVICRM

CiviCRM is written with English-language code and strings for display. It has, however, also been built for organisations worldwide. They need to be able to adapt the tool to local circumstances and demands without modifying the tool technically.

Localising CiviCRM (or any software) affects much more than you might initially think. To adapt CiviCRM to a local language is not just a matter of translating the text displayed on the screen. Consider for example the currency used in a given country (USD or \$ in United States, GBP or £ in Great Britain), date and time formats (for example: November 16th, 2009 will be commonly written as 11/16/2009 in United States, but in Russia the format will be 16.11.2009) or the formatting of numbers (the same number will be written slightly differently in different countries: 1 234 567.89 in Slovakia or Hungary, but 1,234,567.89 in Japan or the United States).

CiviCRM provides plenty of functionality to support these language and region specific needs. The development team is constantly developing new tools in this area too. The Localization screen (shown in the following screenshot) lets an administrator select the right locale for the language and country of the organization using CiviCRM. Go to: Administer > Configure > Global Settings > Localization.

The screenshot shows the 'Settings - Localization' interface. It includes several configuration options: 'Default Language' is set to 'English (USA)' with a dropdown arrow; below it is the text 'Default language used for this installation.'; 'Inherit CMS Language' is an unchecked checkbox with the text 'If checked, CiviCRM will follow CMS language changes.'; 'Default Currency' is set to 'USD (\$)' with a dropdown arrow; below it is the text 'Default currency assigned to contributions and other monetary transactions.'; 'Available Currencies' is a section with a list of currencies (FJD (\$), FKP (£), GBP (£), GEL, GHC (¢)) on the left, 'Add >>' and '<< Remove' buttons in the middle, and a list of selected currencies (USD (\$), EUR (€)) on the right; 'Monetary Locale' is set to 'English (USA)' with a dropdown arrow; below it is the text 'Locale for monetary display (affects formatting specifiers below)'.

TRANSLATIONS

CiviCRM accommodates different languages, however the developers rely on the community to translate the text displayed.

A number of languages have already been provided to a greater or lesser extent. Some have more than 90% of the text translated, others only 5%, and a number of languages have not been translated at all. Please check the online translation tool Transifex (<http://www.transifex.net/projects/p/civicrm/>) to find out about your language of interest. Download and install it on your CiviCRM installation to find out how well it will suit your needs.

You may find that although the translation is correct, you would want to use different terms in your situation. You are very much encouraged to take part in the translation of your language.

FACILITIES

A number of facilities in CiviCRM support the community in its translation efforts, though some are still under development.

1. Transifex is an online tool that enables groups of translators to translate strings of text and keep an overview on its progress. Register there, look for your language, join the team or, if your language is not available, start translating.
2. A glossary (<http://wiki.civicrm.org/confluence/display/CRM/Glossary+for+translations>) on CiviCRM's wiki will help you maintain consistency in your translations. It will also help you get some insight on how much work it will be to translate those strings of text that your users will most often see and that would therefore be the first to translate.
3. A tips and tricks wiki page (<http://wiki.civicrm.org/confluence/display/CRM/Localisation+community+building+howto>) explains how to set up your localization community.
4. A FAQ (<http://wiki.civicrm.org/confluence/display/CRM/Getting+started+with+CiviCRM+Localisation+FAQ>) on the CiviCRM wiki covers localisation.

GETTING STARTED

Feel like helping translating CiviCRM to a new language or improving the current translation? Here's how to do it (provided you have a bit of a technical background):

1. Go to transifex.net and create an account.
2. Look for your language on <http://www.transifex.net/projects/p/civicrm/teams/> and either join a team, or request the creation of a new one if needed.
3. Start translating!

Team work

The CiviCRM translation work flow is still a work-in-progress and until the process becomes more mature, you should probably refer to <http://wiki.civicrm.org/confluence/display/CRM/Localisation+community+building+howto> for the most current instructions.

The work flow is heavily based on teamwork. Hopefully, there is already a team of translators for your language that you can join. This team will have built a glossary, will have started a translation set and will be able to review your translations and give constructive criticism. If such a team does not yet exist, the opportunity is all yours to create one.

COMPONENTS AND FILES

There are quite a lot of strings (phrases) to translate in CiviCRM. To make it easier to translate the part that you are interested in (hopefully the one you know best), the strings that need translation have been divided into *components*, which are CiviCRM plugins (e.g., CiviCRM core, CiviMail, CiviContribute, etc.). A separate component should be available for each version of CiviCRM, starting with version 3.2 (or 3.1, for language teams that have chosen to do so).

Each component itself contains a number of files, which themselves contain the strings to translate. The main component "CiviCRM" (the *core*) has close to 20 files (for *countries*, *provinces*, *menu*, etc.).

TOOLS AND TECHNICAL DETAILS

The process you use to do translation depends on whether you prefer to do translation online or offline. Online translation does not require installation of any software. Offline translation is done with files downloaded from the translation website, using software that offers more features than the online system.

Online translation

Transifex is the tool to use for online translation. It does not have as many features as an offline tool such as PoEdit, but it's the easiest way to contribute translations and do the occasional quick correction. Every translator should have an account on the Transifex site, because translation teams can use the forums and messaging system to coordinate their work.

The basic steps in online translation are:

1. Select a component on <http://www.transifex.net/projects/p/civicrm/>. This will display the list of language teams for this component.
2. Click on the icon in the Options column next to the language you are interested in. This brings you to the list of files for this component.
3. Click on the "pencil and paper" icon. This brings you to the online translation screen, which lists all the translatable strings in this file.
4. For each string, you can then enter a translation.
5. When you are finished, you can click on the "Send for review" button at the end of the page.

Offline translation

Most translation is usually done with an offline translation tool. One of the most common is PoEdit (see <http://www.poedit.net>), which is free software and has a big community of users. The exact steps in translation using an offline tool depend on your tool of choice, but should follow the following steps:

1. Download the files from transifex.net you want to translate.
2. Load the files up in your translation tool and do your translations.
3. Send them back to the site when you are done.

Building a translation memory

PoEdit and other translation software will help you build a translation memory for your language. This translation memory can either be restricted to translations done in CiviCRM, or include translations from other projects. If you include other projects, automatic translation might be able to translate more strings, but you will lose consistency and most strings will be marked as fuzzy. This could be a way to bootstrap a new translation, though.

Building a translation memory based on words from the glossary could go a long way in insuring the consistency of your team's work.

Using version control (mostly for programmers)

Transifex keeps files in a version control system, <http://github.com/civicrm/110n>. This is useful to some users who find interacting with the Github site easier than downloading each file separately from Transifex.

Consistency & consensus

To insure a good consistency in the translation, every team is encouraged to build and use a glossary and employ peer review. You can find a glossary of common terms on <http://wiki.civicrm.org/confluence/display/CRM/Glossary+for+translations>. You definitely should translate these terms to your language, and make sure your team reaches a consensus on all terms.

Building and sharing a common translation memory, which is like a specialized glossary that can be used automatically by translation tools, also helps to insure consistency. The PoEdit help system explains how to build this database (and most other translation software should do the same).

TEAM BUILDING AND SPRINTS

A good way to make progress in translation is to organize *translation sprints*. This means getting as many people as possible together in the same room to translate as many documents as they can. Here are a few things to keep in mind when organizing a translation sprint:

- Choose a good location, where people will be able to get online (enough computers for everybody, or desks to set up laptops and with a decent Internet connection).
- Provide instructions in advance on how to install an offline translation tool such as PoEdit, and have people ready to help others install and use it.
- Create the glossary in advance. Present the glossary, discuss terms which do not have consensus, make sure everybody has access to a copy of the glossary, and print a sufficient amount of copies beforehand.
- Determine goals for the sprint: which component will be translated, and what percentage your team is trying to achieve.
- Make sub-teams with clear objectives: per component or file or a part of it.
- If your translators are not familiar with CiviCRM, do a demo of the features your team is about to translate.
- Clearly designate someone who can be interrupted in order to answer questions.
- Make sure you've got enough coffee, tea, chocolate, etc. in reserve to keep everybody going through the night.
- At the end of the sprint, present the result of the translation in a demo CiviCRM installation.
- Discuss whether the team has reached its goal and how to improve further.

83. CONTRIBUTING TO THIS MANUAL

If you would like to contribute to this book, please follow these steps:

1. REGISTER

Register at FLOSS Manuals:

<http://booki.flossmanuals.net/register>

2. WRITE

Select the manual <http://en.flossmanuals.net/bin/view/CiviCRM/WebHome> and a chapter to work on.

Make sure you are logged in, choose the WRITE version of the web site (the default is only READ) and click the "edit" link next to the chapter you want to work on. You can also create new chapters and put chapters in a different order.

3. MAILING LIST

For discussing all things about FLOSS Manuals, join our mailing list:

<http://lists.flossmanuals.net/listinfo.cgi/discuss-flossmanuals.net>

APPENDICES

84. HISTORY OF THIS BOOK

85. FREE SOFTWARE?

86. GLOSSARY

87. CREDITS

84. HISTORY OF THIS BOOK

This book is the result of the collaborative effort of many people. A lot of the content was written during two book sprints held in 2009 and 2010 in Tahoe, USA. Many contributions have also been made by individuals in the times between these sprints.

THIRD EDITION

This edition includes minor updates to reflect changes in CiviCRM 3.3 which was released in December 2010. It is being published on the eve of the second annual CiviCon conference. Thanks to the generous contributions of our CiviCon Sponsors (listed in the front of the book) - a copy has been provided to each conference participant.

SECOND EDITION

The second edition of the CiviCRM manual was published after a four-day Book Sprint organised by CiviCRM and led by Adam Hyde (FLOSS Manuals). The sprint was sponsored by the Information Program initiative of the Open Society Institute (<http://www.soros.org/initiatives/information>). We are especially grateful to Janet Haven for pushing this forward.

The second edition includes new sections on CiviReports, CiviCase, CiviEngage and Extending CiviCRM. This edition also included an extensive rewrite of nearly every section of the text, including a reorganization of all sections to break up information into Introduction, Planning, Configuration and Everyday Tasks sections, the latter to serve as an easy-to-follow user manual for individuals working with CiviCRM on a daily basis.

We also added an entire new section to assist developers get into the code. Finally, we updated the book to match CiviCRM 3.2 (which is a few weeks away from release at the time of writing).

We think that the reorganisation adds a lot to the book and increases it's readability because it helps people who with CiviCRM in a specific capacity get directly to the chapter relevant to them.

The following photo shows the people who worked on this second edition of the book.



In the back row, starting from the left, you are looking at Dave Greenberg (San Francisco, USA), Kyle Jaster (NY, USA), Xavier Dutoit (Geneva, Switzerland and Brussels, Belgium), Kurund Jalmi (Mumbai, India), Michael McAndrew (London, UK), Wes Morgan (Washington DC, USA), Josue Guillen (DC, USA). The front row from the left is Jack Aponte (NY, USA), Mari Tilos (San Francisco, USA), Sarah Gladstone (Chicago, USA), and Alice Aguilar (NY, USA).

FIRST EDITION

The first edition of manual was written during a five-day book sprint also organised by CiviCRM and led by FLOSS Manuals. The sprint was also sponsored by the Information Program initiative of the Open Society Institute (<http://www.soros.org/initiatives/information>), and again, we are especially grateful to Janet Haven for pushing this forward.

Having secured sponsorship, the CiviCRM Core team invited a group of people from around the globe to gather for a week at Lake Tahoe in California. The *modest* goal was to transform our diverse experience of CiviCRM into a manual that we hope will help people to use this great piece of software. This turned out to be an interesting, and at times difficult, challenge.

The following photo shows the people who wrote this book.



In the back row you are looking at Michael McAndrew (London, UK), Tony Guzman (Salt Lake City, USA), Brian Shaughnessy (Albany, NY, USA), Dave Greenberg (San Francisco, USA), Yashodha Chaku (Mumbai, India) and Adam Hyde (Berlin, Germany). In the front row are Mari Tilos (San Francisco, USA), Cynthia Tarascio (Philadelphia, USA), Michal Mach (Warsaw, Poland) and Peter Davis (Wellington, New Zealand). In the very front is Eileen McNaughton (Wellington, New Zealand).

We came from different backgrounds, had used CiviCRM in different ways, and had worked with very different organisations. It was often a challenge to meld these perspectives into a cohesive whole, but we hammered away at it and we think this made for a better book. We had some lively discussions about important issues, such as whether there is a "z" or an "s" in organization or a "q" in check/queue, and finally agreed to use both spellings in the spirit of internationalism. We also struggled with the word "constituent", which is core to the non-profit sector in America but was unfamiliar to those of us from outside America.

It was been a pretty intense five days. Adam (our friendly Floss manuals taskmaster) kept us realistic, on track, and hard at work - even hauling us back to work after dinner each evening. Overall it was both fun and productive and we really appreciate the way Adam has helped us to actually produce a book within a week. Thank you.

For most of us, however, the highlight of the week has been the breathtaking cuisine cooked by Jill Klein (<http://www.partiesthatcook.com/about-us/>). We love you, Jill, and wish we could take you home with us. We are also grateful to Dave Greenberg, Bob Concannon and Mari Tilos for their hospitality, and to Scout the dog just for being there.



We had help from around the world during the preparation process, and over the course of the Sprint. Andy Oram helped us both in the planning process and then with editing and feedback during the Sprint. We also had a number of people log in to write and edit the manual during the Sprint. They include Robert Santiago, Xavier Dutoit, Joe Murray, Sarmeesha Reddy, Jay Maechtlen, Dream Gomez, Leila Johnson, Duncan Hutty, and Kurund Jalmi.



Our office for the week was Dave and Bob's house.



We mitigated the hardship of late-night work with some tasty beverages.



And occasionally they let us out for a bit....

85. FREE SOFTWARE?

CiviCRM is **Free Software** - this means it is developed by a community and licensed in a generous way so you can use it for free for whatever you want.

Free Software (sometimes also referred to as **Free and Open Source Software**, **FLOSS**, **FOSS**, **Software Libre**, or **Open Source**) is software that anyone can download, share, and - significantly -- change in any way they want. Practically speaking, you might never want to change the software, or even have a staff person who can read the **source code** (the instructions written by programmers). But the ability to change the software protects you in many ways:

- CiviCRM will not go away, unlike non-free software from some companies that gets abandoned if the company goes bankrupt or decides to discontinue specific product.
- The software can be used and customised free of charge.
- Nobody can suddenly take away features or change the terms under which you're allowed to use features.
- If an organisation wants a feature that CiviCRM doesn't provide, the organisation can just hire someone to create it. Of course, the organisation can also submit a feature request to the CiviCRM team as with any software product.
- Similarly, anyone can fix a **bug** (error in the software) if he or she has the skills to do so. Because the source code is available, clients can also find bugs more easily.
- Members of the community have much more input into how CiviCRM develops, because they can understand the product by reading the code and can make changes. Furthermore, many people can try different implementations of features and the community can decide by vote or consensus which one to make official.

That may be enough for you, but for the sake of completeness we'll offer some widely used definitions:

"**Free software** or **software libre** is software that can be used, studied, and modified without restriction, and which can be copied and redistributed in modified or unmodified form either without restriction, or with minimal restrictions only to ensure that further recipients can also do these things and that manufacturers of consumer-facing hardware allow user modifications to their hardware. Free software is available gratis (free of charge) in most cases."

(from: http://en.wikipedia.org/wiki/Free_software)

"**Open source software (OSS)** is defined as computer software for which the source code and certain other rights normally reserved for copyright holders are provided under a software license that meets the Open Source Definition or that is in the public domain. This permits users to use, change, and improve the software, and to redistribute it in modified or unmodified forms. It is very often developed in a public, collaborative manner."

(from: http://en.wikipedia.org/wiki/Open_source_software)

Nearly any software that qualifies as free also qualifies as Open Source, and vice versa. The main reason that two different terms exist is that "free software" emphasizes the freedom aspect (that you aren't under the control of the original programmers) whereas "open source software" emphasizes the convenience and potential for innovation provided by having the source code available.

When you install and use CiviCRM, you'll notice there's no annoying click-through **software license** imposing a thousand things that you can or cannot do with it. That's because free software doesn't limit your right to do with the software whatever you want. Free and open source software have licenses, but they're simpler than and quite different from **proprietary software** ('closed software') licenses. CiviCRM itself is available under **Affero General Public License version 3.0**, one of the popular free software licenses used by many other projects.

FREE SOFTWARE AND NON-PROFITS

Explaining all of the possible considerations on using FOSS in non-profit and advocacy work might take a really long time, so let's focus on the most important highlights:

- One of the priorities of FOSS projects, including CiviCRM, is to involve the community of users in the process of designing and building the software. In the long run, this not only assures that the software is doing exactly what it should do to sustain the needs of its users, but it also allows indirect exchange of knowledge and experience between organisations. By using CiviCRM, you're basically taking advantage of other non-profit and advocacy practitioners' experience.
- Having access to the source code gives you and your organisation certain independence. With proprietary software it's usually impossible to customise the tools to meet your specific needs. With FOSS, you can hire a developer or consultant and work with them on providing specific functionality needed in your work. Additionally, if you contribute your improvements to the project community other organisations will most probably start using them. It means you can receive testing and further improvements of your functionality.
- When a company which provided you with a closed software goes out of business, the usual procedure for an organisation reliant on that software is to abandon the software and start investing in a new one (which is resource intensive and costly). It's less likely to happen with Free and Open Source Software - there is always a community of users and developers around it and there is no single "point of failure". With FOSS projects, if the main organisation behind a specific piece of software shuts down or changes their focus, the community takes over, a new organisation is formed and the software development and support continues.

Apart from the quite practical advantages listed above, there is also a more philosophical approach to answering the question of importance of FOSS for non-profits and advocacy organisations. Without getting too deep into philosophical discussions, there is a great overlap between values shared by non-profit organisations and these shared by Free and Open Source Software communities. By working with the community of users, providing your feedback, contributing your changes back into the project, you're actually strengthening the non-profit sector.

FURTHER READING

Free Software Foundation

<http://www.fsf.org/>

The Free Software Definition

<http://www.gnu.org/philosophy/free-sw.html>

Open Source Initiative

<http://www.opensource.org/>

The Open Source Definition

<http://www.opensource.org/docs/osd>

GNU Affero General Public License v3

<http://www.opensource.org/licenses/agpl-v3.html>

Choosing and Using Free and Open Source Software: A primer for nonprofits

<http://www.nosi.net/projects/primer>

86. GLOSSARY

ACCIDENTAL TECHIE

Someone who has inherited the role of IT technical support but whose primary role maybe something else; often has little or no formal IT training (which is not always a bad thing!).

ACCORDION

A **javascript**-based effect on a web page that allows additional content to be revealed or hidden (often referred to as collapsed or uncollapsed) without the user leaving the web page.

ACL (ACCESS CONTROL LIST)

ACLs define **permissions** for a group of **contacts** to perform an operation (e.g. edit, view, delete) on a set of data or a type of record. For example, you could set up a group called "Administrators" that allows people to view and edit all contact records, and a group called "Volunteers" that can view contact records but not edit them.

ACTIVITIES

An activity in **CiviCRM** is a record of any scheduled or completed interaction with one or more **contacts**. Examples include meetings, phone calls, emails, event attendances and contributions. You can define additional types of activities as needed.

ADMIN / ADMINISTRATOR

The person or persons that maintain a **server** or a web-based software like **CiviCRM**. Administration includes maintenance, configuration, **backup**, security, creating and deleting user accounts and so on.

AGM (ANNUAL GENERAL MEETING)

An AGM is a meeting held every year by an organisation to inform its members of previous and future activities. Certain types of organisations are required by law to hold an AGM.

AGPL (AFFERO GENERAL PUBLIC LICENSE)

A license for **open source software**. **CiviCRM** uses the [AGPL version 3.0 license](#), which gives you the right to do with the **software** as you like and guarantees that the **source code** will always protect your rights in this way.

ALPHA VERSION

A **software** version that contains very new **source code** with new functionality and bug fixes. An alpha version is released for testing purposes, and for people who want to follow its development, but it is not considered to be any where near ready for general release or use.

APACHE

The most popular web **server software**. Apache is free and **open source** (see also **FLOSS**).

API (APPLICATION PROGRAMMING INTERFACE)

An interface employed by a **software** application to enable interaction between itself and other software.

BACKUP

Protecting your data by regularly making copies and storing them independently of the original files so they can be restored if necessary.

BANDWIDTH

The speed at which you can transfer information through a network or internet connection. If a connection can transfer a lot of information it is said to be "high bandwidth".

BETA VERSION

A **software** version that is in good condition but still needs testing to make sure it functions as intended before general release. Testing beta versions is a helpful way to participate in the CiviCRM community.

BLOG

Short for web-log. A website which is regularly updated with news and views from one or more individuals.

BUG

An error that prevents **software** from behaving as the user would expect.

BUG REPORTING / BUG FIXING

The process of reporting **bugs** to the **software developer(s)**, and then fixing the bugs so the software operates as intended.

BUG TRACKER

An official repository for recording **bugs**. The CiviCRM bug tracker can be found here: <http://issues.civicrm.org/> (click on Issue Tracker).

CACHE

A recent copy of frequently used data that can be quickly and easily accessed. This is especially useful if the data is complicated or takes a large effort to generate. The disadvantage of caching is that data can become out of date, but this normally isn't a problem. Even caching data for 5 minutes might be useful in certain circumstances. If a page is accessed 1,000 times in 5 minutes, having a cached version means the data will only need to be generated once.

A web cache holds copies of recently visited web page files. Sometimes a user may need to clear their web cache in order to see updated information on a web page.

CANVASSING

Is the systematic initiation of direct contact with a target group of individuals commonly used during political campaigns. A campaign team (and during elections a candidate) will knock on doors of private residences within a particular geographic area, engaging in face-to-face personal interaction with voters. Canvassing may also be performed by telephone, where it is referred to as telephone canvassing.

CAPTCHA

A spam prevention tool. See **reCaptcha**.

CIVICASE

The case management **component** of **CiviCRM**. CiviCase provides service organisations with tools for structuring, scheduling and recording case activities.

CIVICONTRIBUTE

CiviContribute is an online fundraising and donor management **component** which enables you to track and manage contributions to your organisation.

CIVICRM

What this whole manual is about! **CiviCRM** is web-based, **open source software** that allows you to record and manage information about your various **constituents** including volunteers, activists, donors, employees, **clients**, vendors, etc.

CIVIDOG

See **Scout**.

CIVIENGAGE

CiviEngage is a Drupal module that enhances CiviCRM's core functions for non-profits focused on community organizing groups and civic engagement work. CiviEngage provides a package of custom fields, reports and features to track the history of engagement, involvement, and activities of constituents over time. This package also integrates Campaigns and Surveys to provide WalkLists and PhoneBank Lists.

CIVIEVENT

CiviEvent provides integrated online event registration and management for paid and free events.

CIVIMAIL

CiviMail is a mass-mailing **component** which allows you to engage **constituents** with personalised email blasts and newsletters.

CIVIPLEDEGE

CiviPledge is a component that allows the flexibility to create various types of fundraisers. Allows to individuals to donate daily, weekly, monthly or yearly.

CLIENT

A term used sometimes instead of **constituent** or **contact**, more often in a context involving a financial transaction.

Client is also a term for a system (computer) or application that accesses a remote computer such as a web **server** to receive information; examples include a personal computer that is connected to the internet, or an email application that downloads email from a server.

CLOSED SOFTWARE

Software that does not allow users to access its **source code**, as opposed to **open source software**. See also **proprietary software**.

CMS (CONTENT MANAGEMENT SYSTEM)

An application used to create, edit, manage, search and publish various kinds of digital content (text and other media such as images and videos). Web-based CMS allow organisations to add and manage content on their website without requiring advanced technical skills. **CiviCRM** is often integrated with a CMS (commonly **Drupal** or **Joomla!**) which helps to facilitate **client** interaction.

COMPONENT

A part of a **CMS** or other application that can be enabled or disabled, according to the needs of the user. Examples include **CiviEvent** or **CiviCase**. See also **module**.

COMMUNITY ADVISORY GROUP

A representative group of people from the **CiviCRM** community who work with the **CiviCRM** team on project development.

COOKIE

A file stored on your computer and used by a website to identify you on return visits. Some websites cannot be accessed unless you allow your computer to accept and store cookies.

CONSTITUENT

A constituency is usually defined as a group of people bound by shared identity, goals, or loyalty. In **CiviCRM**, "constituents" is used to describe all supporters, current or potential, of a given organisation. See also **contact** and **client**.

CONTACT

In **CiviCRM** a contact is either an individual, an organisation or a household about whom information is stored in the database. See also **constituent** and **client**.

CONTACT SUMMARY SCREEN

A page that displays at a glance all the data about an individual, organisation or household that is stored in the **CiviCRM** database.

CORE CODE

The **source code** that constitutes the official code of **CiviCRM**. Also called **core**.

CORE DATA FIELD

A field that is included in a record structure "out-of-the-box". For example, the **CiviCRM** **contact** record includes First Name as a core field.

CORE TEAM

The people most closely involved with **CiviCRM** development.

CRM

Acronym for Contact (or Constituent, Customer or Client) Relationship Management. CRM (or eCRM) **software** was originally developed from a sales perspective, to help companies track and organise their interactions with current and potential customers. **CiviCRM** is oriented specifically toward the needs of **non-profits**, advocacy and non-governmental organisations, so the term "customer" is replaced with "**constituent**". Outside the USA it is often referred to as Contact Relationship Management.

CRON JOB

A cron job is a way of automatically scheduling a programme to run at certain intervals. Crons are often used in **CiviCRM** to handle daily or monthly events such as sending membership renewal reminders or processing ongoing payments.

CRUD

Create, Read, Update and Delete: the basic functions performed on databases.

CSS (CASCADING STYLE SHEETS)

A way to control the style of a website by defining design and layout elements in a single file which is linked to all files in a website and applies the style across the site. An element, such as the formatting of a heading or a background colour, can be changed once in the CSS file to effect a change on all pages of the site.

CSV (COMMA SEPARATED VALUES)

A simple format for a spreadsheet. CSV files are text files where each cell is separated by a comma, and each row is separated with a return. This very simple format is understandable by many different programmes.

CUSTOM DATA FIELD

A field that is added to the data structure of a **CiviCRM** record by your organisation. Custom data fields extend the information that can be stored in that type of record. For example, your organisation might need a custom field to record each **contacts'** professional qualifications, or the food preferences of event participants.

DASHBOARD

A user's homepage, which displays when the user logs in to **CiviCRM** and which can be personalised with **dashlets**.

DASHLET

A report on some data in the **CiviCRM** database, configured to appear on a user's **dashboard**. For example, monthly figures in graph and/or numerical form, appointments for the day, or a list of new memberships.

DATA CENTRALISATION

Storing all your data in one place.

DATABASE

Is a collection of information that is organized so that it can easily be accessed, managed, and updated. In one view, databases can be classified according to types of content: bibliographic, full-text, numeric, and images.

DEMO SITE

A website that allows you to test and explore the functionality of a piece of software. **CiviCRM** maintains three demo sites: one integrated with **Drupal**, one integrated with **Joomla!** and one in standalone mode.

DEDUPE

Refers to the task of finding and merging multiple entries for one **contact**.

DEVELOPER

Someone who develops **software**.

DOMAIN

See **DNS**.

DONOR

Someone who makes a donation, i.e. voluntarily gives money to an organisation.

DNS (DOMAIN NAME SYSTEM)

The Domain Name System (DNS) converts domain names, which are made up of easy-to-remember combinations of letters (example.com), to IP addresses (123.456.123.234) which are hard-to-remember strings of numbers. Every computer on the internet has an unique address (a little bit like an area code + telephone number).

DRUPAL

An open source **CMS** that integrates with **CiviCRM** to provide a user-interface and additional website functionality (<http://drupal.org>).

ENCRYPTION

A way of disguising data when it is being transferred from one computer to another so that it is unreadable by any other computer that it may pass through on the way.

ENVIRONMENT

The specific hardware and operating system on which you are running your **software**.

EVENT LISTING FEED

A **RSS feed** containing the list of events defined in **CiviEvent**.

FIREFOX

A popular free and **open source** web browser, developed by the Mozilla Foundation (<http://www.mozilla.com>)

FLOSS (FREE/LIBRE OPEN SOURCE SOFTWARE)

Software that is licensed so as to guarantee the essential freedoms of users to its **source code** and reuse. A combination of "**free software**" and "**open source software**", with "libre" added in to emphasise that software freedom is essentially a matter of rights, not price.

FOSS

Free and Open Source Software - see **FLOSS**.

FORUM

A web-based online discussion tool (see <http://forum.civicrm.org/>).

FREE SOFTWARE

Software that is licensed so that you can use and distribute it without restriction. **CiviCRM** is free software. See also **FLOSS**.

FTP (FILE TRANSFER PROTOCOL)

The FTP protocol is used for file transfers from one computer to another over the internet. Many people use it for downloads, and it can also be used to upload files to web **servers**. A popular free and **open source** FTP **client** for Windows is FileZilla. There are also web-based FTP clients that you can use with a normal web browser like Firefox.

FUNCTIONALITY

The set of tasks that a piece of **software** can perform.

GEOCODING

The process of finding associated geographic coordinates (often expressed as latitude and longitude) from other geographic data, such as street addresses, or zip codes (postal codes).

GUI (GRAPHICAL USER INTERFACE)

User interface offering windows, icons, mouse control, multiple fonts, and so on - the normal way for non-programmers to communicate with their computers. The alternative to a GUI is a command line interface with text only.

HOOK

Hooks are a common way to extend systems and a powerful way to extend CiviCRM's functionality, incorporate additional business logic, and even integrate CiviCRM with external systems.

HOUSEHOLD

Is a family or group of people who share a physical location.

HOSTING SERVICE

A service (usually commercial) that provides **server** space for your website. Hosting services also can provide physical space to put your own server in so that it is connected to the internet.

ICT

Acronym for Information and Communication Technology.

INTERNATIONALISATION: I8N

The process of making **software** ready for adoption in different countries and different cultures, without the need to modify it technically. This is done by the **developer** (software engineer) when writing the software. See also **Localisation**.

INTERNET SERVICE PROVIDER (ISP)

A business that provides services such as internet access, email, and website hosting.

INTRANET

A network of computers that are connected within a home or office but not accessible from outside the local network.

IT

Acronym for Information Technology.

JAVASACRIPT

A scripting language primarily used in web pages to display dynamic content.

JOOMLA!

A CMS that can integrate with CiviCRM to provide a user interface and additional website functionality (<http://www.joomla.org>).

LAMP

Is an acronym for a solution stack of free, open source software, originally coined from the first letters of Linux (operating system), Apache HTTP Server, MySQL (database software) and Perl/PHP/Python, principal components to build a viable general purpose web server.

LINUX

A type of operating system (other common operating systems are Windows and Mac OS). Linux has been popular as a web **server** for a long time and is now gaining popularity on personal laptops and desktop computers. Linux is **free software** and **open source**.

LOCAL COMPUTER

A computer that runs CiviCRM but is not publicly available via the internet. This could be your personal or home computer, or it can be in your office. It can also be called a **client** computer in the context of receiving information from a **server**

LOCALISATION: L10N

The process of translating a product into different languages or adapting a language for a specific country or region. This is done by translators with no need for technical wizardry.

MAIL SERVER

A computer that transfers email from one computer to another.

MAPPING PROVIDER

A service provider that allows displaying contact locations on maps - Google Maps or Yahoo Maps in CiviCRM.

MODULE

A part of a system, also called a **component**. CiviCRM includes a number of modules, each of which adds functionality to the basic contact management features. For example, the CiviEvent module provides event management functionality. Organisations using CiviCRM can turn modules on or off, according to their needs.

MYSQL

A popular database engine. CiviCRM uses MySQL to hold its data. MySQL is **free software**. (<http://mysql.com>)

NGO (NON-GOVERNMENTAL ORGANISATION)

A legally constituted non-business organisation with no participation or representation from government. In the United States, this type of organisation is more often referred to as a **Non-profit**. They may be also called civil society organisations or not-for-profits.

NON-PROFIT

see **NGO**.

ONLINE CONTRIBUTION PAGE

A function of **CiviCRM** which allows the creation of a page on the website where visitors can make online donations using credit cards.

OPEN ID

A convenient free system to use a single digital identity across the internet.

OPEN SOURCE SOFTWARE

Software with **source code** that is publicly available, as opposed to **proprietary software**; see also **FLOSS**. Open source software is based on the philosophy that sharing and collaborating on code leads to better software and greater benefit for everyone.

PAYMENT INSTRUMENT

Medium or method that is used for online payments.

PAYMENT PROCESSOR

A company (usually a third party) appointed by a merchant to handle credit card transactions for merchant banks. A payment processor is required to handle online transactions through a system such as **CiviCRM**.

PERMISSIONS

Allow you to limit access for different users to different parts of the system.

PERSONAL CAMPAIGN PAGES

A feature of **CiviCRM** that can be enable to allow **constituents** to create their own fundraising pages.

PHP

The programming language in which the majority of **CiviCRM** is written.

PING

Sending and receiving small amounts of data to and from a server; often used to measure the response time across the network.

POINT PERSON

Someone given the responsibility to keep their eye on a certain issue.

PHONEBANK LIST

A list created using CiviReport to make it easy for volunteers to call constituents en masse. This is often done to invite them to vote, request that they volunteer, take action, or donate.

PREMIUM

A gift that can be offered to contributor in exchange for donation. **CiviCRM** allows offering premiums as a part of the donation gathering process.

PRICE SETS

A way of storing and re-using complicated price structures for events. For example, you can charge for different elements of an event.

PRIMARY LOCATION

The information that a **constituent** wants to be used as their main point of contact for mailings etc.

PROFILES

A central concept in **CiviCRM**. In essence a subset of fields. See the chapter on **Collecting and Sharing Data** for a full explanation.

PROPRIETARY SOFTWARE

Also called **closed software** or closed source software. **Software** licensed so that you cannot access the **source code** and modify it without first coming to an agreement with the authors. See also **open source software**.

PROTOCOL

An agreed-upon method of doing something. HTTP and SMTP are two examples, one being an agreement on how to transfer website data across the web, the other an agreement on how email will be transferred across the web.

RADIO BUTTON

An element of a web-based application user interface that allows the user to choose only one of a predefined set of options. Usually indicated by a white circle that can be filled with a click.

RECAPTCHA

A common tool for testing whether a user is a human or a computer, used to prevent spam.

REQUIREMENTS

The things that you require a particular **software** application to do.

RICH TEXT EDITOR

A text editor that allows you to add formatting, such as bold, italic and underline, to text (as opposed to just plain text).

ROOT DOMAIN

The 'raw' **URL** of a website without 'www' or any other **subdomain**. For example, <http://civicrm.org/> is the root domain while <http://www.civicrm.org/> is not.

RSS (REALLY SIMPLE SYNDICATION) FEED

RSS feeds are a way to publish frequently updated information, either for inclusion on a website or to be read by an RSS reader.

RSVP

"Répondez s'il vous plaît", a French phrase that translates to "please respond". Commonly used to request confirmation (or declining) of attendance at an event.

SCRIPT

A script is a short programme that does one specific task. Many web pages include scripts to manage user interaction, so that the **server** does not have to send a new page for each change.

SCOUT

The CiviCRM Book Sprint official dog. Scout likes dog biscuits, rolling on the ground, eating snow and proof-reading.

SENDMAIL

Sendmail is one of the most popular mail transfer agents (MTA) used for handling email on a **server**. Sendmail is free and **open source software**.

SERVER

1. Software that "serves" content to a **client**. See **Apache**, or **Mail Server** for two examples.
2. A computer that is used primarily to serve content. Any computer can be set up this way, but the term traditionally refers to those that deliver web content. See also **client** computer.

SHARED HOSTING

A website hosting service, where multiple websites reside on single **server**.

SMART GROUP

A group in CiviCRM to which **contacts** are automatically assigned. Smart groups are created by running and then saving a search. They are useful for groups that might change frequently, for example "donations over \$1000 in the last month".

SMTP

Simple Mail Transfer Protocol. A standard or **protocol** used by email **software** to transfer (send) email.

SOFT CREDIT

Allows you to credit a **contact** for a donation made by someone, for example the person who inspired the actual donor to make a donation. See **Personal Campaign Pages**.

SOFTWARE

Applications (also called programs or programmes) that enable specific functionality on your computer. There are many broad categories of software such as web browsers, word processors and email **clients**. Within each category there are many available softwares that perform the functions you require. For example, Firefox and Internet Explorer are two commonly-used web browsers.

SOFTWARE LICENSE

The terms you must accept before using a piece of **software**.

SOURCE CODE

Software is created by writing instructions that a computer understands. These lines of instructions are known as **code** or source code.

SSL (SECURE SOCKETS LAYER)

One way of making internet communication secure. You can easily see if you are using SSL by looking at the URL in your browser: if it starts with https instead of http, your connection is using SSL.

SSL CERTIFICATE

Provided by the server to prove its identity, in the same way that a person carries a passport or driving license. See also **SSL** (Secure Sockets Layer).

STABLE VERSION

A version of **software** that has been tested and is considered to be ready for general use.

STRING

A string is a sequence of characters for example "Hello, World", the **URL** "<http://www.flossmanuals.net/>" or the text message "No such file or directory". Different character sets allow different strings. Unicode strings can include any combination of languages, such as "Japan (日本)" and Korea (대한민국)".

SUBDOMAIN

A **domain** that is a part of larger larger domain. For example: en.flossmanuals.net and fa.flossmanuals.net are subdomains of the domain flossmanuals.net.

TOKEN

Tokens are used in **CiviCRM** to insert elements such as a **contact**'s name or a standard greeting into emails being sent from the system. In an email sent to a group of people, the token {first.name} will be replaced with actual name of each message recipient, in the email that each individual receives.

UPGRADE

The process of replacing **software** with a newer **version** of the same software. An upgrade may fix bugs, improve security, enable the software to continue to work with upgraded operating systems, or provide new features and other enhancements.

URL

Acronym for Unique Resource Locator, sometimes referred to as a Universal Resource Indicator, or URL. The technical convention that identifies the location of a resource on a network. The resource might be a web page, in which case the URL refers to the location of that web page on the internet, for example www.civicrm.org is the URL for **CiviCRM**.

USE CASE

Use case is a central concept in **software** development. A use case is a story or scenario that documents the experience of performing a specific task with the application. Generally, a use case should avoid technical or database-specific language, such as 'fields' or 'record', and concentrate on real world objects and scenarios in order to communicate the idea clearly to people who may not be familiar with technical terms.

VERSION

Updates to **software** are released periodically, and these releases are referred to as a version of the software. There are different types of version, for example the most recent release of a software which has been tested and is intended for general use is referred to as the **stable version**, while a very new untested version is the **alpha version**.

VPN (VIRTUAL PRIVATE NETWORK)

A method of sharing information between members of an organisation over encrypted connections.

WALK LIST

Is a list created using CiviReport to make it easy for volunteers to go door-to-door. This is often done for voter engagement.

WEB APPLICATION

A **software** application that provides a website with additional functionality. **CiviCRM** is a web application.

WEBMAIL

Webmail is email service through a website. The service sends and receives email messages for users in the usual way, but provides a web interface for reading and managing messages, as an alternative to running a mail **client** like Outlook Express or Thunderbird on the user's computer. For example a popular and free webmail service is <https://mail.google.com/>

WEB-SERVER

A Web server is a computer that is set up with software and networking capabilities to deliver Web pages on the Internet or an Intranet. Web servers use programs such as Apache or IIS to deliver Web pages over the http protocol.

WIKI

A web-based **software** that enables anyone to edit content via a web browser. Wikipedia is the best known example of a wiki.

WILDCARD

A character that can match any number and collection of characters, normally represented by `.`. **For example, when used in searches, `ab` finds ab, abba and abracadabra but not fabulous; `ab` finds fabulous.**

WORK STATION

A computer used for working; often in a situation such as an office where there are other computers that may include **servers**.

WYSIWYG (WHAT YOU SEE IS WHAT YOU GET)

An application that provides a visual tool for editing web content, so that the user can see how the page will look in the browser as they are editing, instead of working in the HTML **code**. See also **rich text editor**.

87. CREDITS

WHAT IS CIVICRM?

Modifications:
adam - adam hyde 2011

REAL WORLD EXAMPLES

Modifications:

WHO IS CIVICRM?

Modifications:
adam - adam hyde 2011

IS CIVICRM FOR YOU?

Modifications:
adam - adam hyde 2011

IDENTIFYING YOUR NEEDS

Modifications:
reperry - Robyn Perry 2011
adam - adam hyde 2011

TRANSITIONING TO CIVICRM

Modifications:
reperry - Robyn Perry 2011
adam - adam hyde 2011

INSTALLATION & BASIC SET -UP

Modifications:
michaelsmcandrew - Michael McAndrew 2011
techczech - Dominik Lukes 2011
adam - adam hyde 2011

EMAIL SYSTEM CONFIGURATION

Modifications:
techczech - Dominik Lukes 2011

SECURITY

Modifications:
adam - adam hyde 2011

OVERVIEW

Modifications:
reperry - Robyn Perry 2011
davem - Dave Moreton 2011
adam - adam hyde 2011

CONTACTS

Modifications:
reperry - Robyn Perry 2011
adam - adam hyde 2011

GROUPS AND TAGS

Modifications:

reperry - Robyn Perry 2011
michaelmcandrew - Michael McAndrew 2011
adam - adam hyde 2011

ACTIVITIES

Modifications:

davem - Dave Moreton 2011
michaelmcandrew - Michael McAndrew 2011

RELATIONSHIPS

Modifications:

reperry - Robyn Perry 2011
michaelmcandrew - Michael McAndrew 2011
adam - adam hyde 2011

CUSTOM FIELDS

Modifications:

reperry - Robyn Perry 2011
adam - adam hyde 2011
helen - helen varley jamieson 2011

PROFILES

Modifications:

reperry - Robyn Perry 2011
adam - adam hyde 2011

MENU, DASHBOARD & DASHLETS

Modifications:

reperry - Robyn Perry 2011

WHAT IS CIVICRM?

Modifications:

SEARCHING

Modifications:

reperry - Robyn Perry 2011
michaelmcandrew - Michael McAndrew 2011
adam - adam hyde 2011

REAL WORLD EXAMPLES

Modifications:

IMPORTING DATA

Modifications:

michaelmcandrew - Michael McAndrew 2011
adam - adam hyde 2011

WHO IS CIVICRM?

Modifications:

EXPORTING DATA

Modifications:

adam - adam hyde 2011
helen - helen varley jamieson 2011

DEDUPING AND MERGING

Modifications:
michaelsmcandrew - Michael McAndrew 2011
adam - adam hyde 2011
helen - helen varley jamieson 2011

ABOUT THIS BOOK

Modifications:
DavidGreenberg - David Greenberg 2011

TOKENS AND MAIL MERGE

Modifications:
techczech - Dominik Lukes 2011
adam - adam hyde 2011

IS CIVICRM FOR YOU?

Modifications:

WHAT IS CIVICCONTRIBUTE?

Modifications:
booki - adam or aco 2011
helen - helen varley jamieson 2011

ORGANISATIONAL ANALYSIS

Modifications:

WHAT YOU NEED TO KNOW

Modifications:
davem - Dave Moreton 2011
helen - helen varley jamieson 2011

PROJECT MANAGEMENT

Modifications:

PAYMENT PROCESSORS

Modifications:
davem - Dave Moreton 2011
helen - helen varley jamieson 2011

HOW DATA IS ORGANISED?

Modifications:

PLEDGES

Modifications:
davem - Dave Moreton 2011
adam - adam hyde 2011

EXTENDING CORE DATA

Modifications:

SET -UP

Modifications:
helen - helen varley jamieson 2011

EVERYDAY TASKS

Modifications:
helen - helen varley jamieson 2011

PROFILES

Modifications:
DavidGreenberg - David Greenberg 2011

REPORTS AND ANALYSIS

Modifications:
Abril - Abril Rocabert 2011
michaelmcandrew - Michael McAndrew 2011

INSTALLATION

Modifications:
DavidGreenberg - David Greenberg 2011

MENU AND DASHBOARD

Modifications:
DavidGreenberg - David Greenberg 2011

WHAT IS CIVIEVENT?

Modifications:
reperry - Robyn Perry 2011
adam - adam hyde 2011
helen - helen varley jamieson 2011

WHAT YOU NEED TO KNOW

Modifications:
reperry - Robyn Perry 2011
adam - adam hyde 2011
helen - helen varley jamieson 2011

CONTACTS

Modifications:
DavidGreenberg - David Greenberg 2011

SET-UP

Modifications:
reperry - Robyn Perry 2011
helen - helen varley jamieson 2011

TAGS AND GROUPS

Modifications:

SEARCHING

Modifications:
DavidGreenberg - David Greenberg 2011

EVERYDAY TASKS

Modifications:
Abril - Abril Rocabert 2011
helen - helen varley jamieson 2011

REPORTS AND ANALYSIS

Modifications:
michaelmcandrew - Michael McAndrew 2011
techczech - Dominik Lukes 2011
adam - adam hyde 2011

IMPORTING

Modifications:

DEDUPING AND MERGING

Modifications:

EXPORTING

Modifications:

WHAT IS CIVIMEMBER?

Modifications:
davem - Dave Moreton 2011
michaelmcandrew - Michael McAndrew 2011
adam - adam hyde 2011
helen - helen varley jamieson 2011

POSTAL MAIL

Modifications:

WHAT YOU NEED TO KNOW

Modifications:
reperry - Robyn Perry 2011
michaelmcandrew - Michael McAndrew 2011
davem - Dave Moreton 2011
adam - adam hyde 2011
helen - helen varley jamieson 2011
avaguiar - Alice Aguilar 2011

SET -UP

Modifications:
michaelmcandrew - Michael McAndrew 2011
adam - adam hyde 2011
avaguiar - Alice Aguilar 2011
helen - helen varley jamieson 2011

EVERYDAY TASKS

Modifications:

EVERYDAY TASKS

Modifications:
Abril - Abril Rocabert 2011
michaelmcandrew - Michael McAndrew 2011
avaguiar - Alice Aguilar 2011
adam - adam hyde 2011

REPORTS AND ANALYSIS

Modifications:

Abril - Abril Rocabert 2011

michaelmcandrew - Michael McAndrew 2011

avaguilar - Alice Aguilar 2011

WHAT IS CIVICONTRIBUTE?

Modifications:

PLANNING

Modifications:

CONFIGURING

Modifications:

WHAT IS CIVIMAIL?

Modifications:

michaelmcandrew - Michael McAndrew 2011

adam - adam hyde 2011

helen - helen varley jamieson 2011

WHAT YOU NEED TO KNOW

Modifications:

repery - Robyn Perry 2011

michaelmcandrew - Michael McAndrew 2011

techczech - Dominik Lukes 2011

adam - adam hyde 2011

helen - helen varley jamieson 2011

EVERYDAY TASKS

Modifications:

SET -UP

Modifications:

repery - Robyn Perry 2011

techczech - Dominik Lukes 2011

EVERYDAY TASKS

Modifications:

michaelmcandrew - Michael McAndrew 2011

techczech - Dominik Lukes 2011

WHAT IS CIVIEVENT?

Modifications:

PLANNING

Modifications:

REPORTS AND ANALYSIS

Modifications:

michaelmcandrew - Michael McAndrew 2011

techczech - Dominik Lukes 2011

CONFIGURING

Modifications:

EVERYDAY TASKS

Modifications:

DavidGreenberg - David Greenberg 2011

WHAT IS CIVIREPORT?

Modifications:

davem - Dave Moreton 2011

adam - adam hyde 2011

helen - helen varley jamieson 2011

WHAT YOU NEED TO KNOW

Modifications:

davem - Dave Moreton 2011

adam - adam hyde 2011

helen - helen varley jamieson 2011

SET -UP

Modifications:

davem - Dave Moreton 2011

adam - adam hyde 2011

helen - helen varley jamieson 2011

WHAT IS CIVIMEMBER?

Modifications:

PLANNING

Modifications:

EVERYDAY TASKS

Modifications:

helen - helen varley jamieson 2011

CONFIGURING

Modifications:

EVERYDAY TASKS

Modifications:

WHAT IS CIVICASE?

Modifications:

repperry - Robyn Perry 2011

helen - helen varley jamieson 2011

WHAT YOU NEED TO KNOW

Modifications:

davem - Dave Moreton 2011

helen - helen varley jamieson 2011

WHAT IS CIVIMAIL?

Modifications:

SET -UP

Modifications:
reperry - Robyn Perry 2011
davem - Dave Moreton 2011
demeritcowboy - Dave D 2011
helen - helen varley jamieson 2011

PLANNING

Modifications:

EVERYDAY TASKS

Modifications:
reperry - Robyn Perry 2011
demeritcowboy - Dave D 2011
helen - helen varley jamieson 2011

REPORTS AND ANALYSIS

Modifications:
Abril - Abril Rocabert 2011
davem - Dave Moreton 2011

SYSTEM CONFIGURATION

Modifications:

CONFIGURING

Modifications:

EVERYDAY TASKS

Modifications:

WHAT IS CIVICCAMPAIGN?

Modifications:
reperry - Robyn Perry 2011
adam - adam hyde 2011
avaguiar - Alice Aguilar 2011
helen - helen varley jamieson 2011

WHAT YOU NEED TO KNOW

Modifications:
reperry - Robyn Perry 2011
avaguiar - Alice Aguilar 2011
helen - helen varley jamieson 2011

SET -UP

Modifications:
reperry - Robyn Perry 2011
avaguiar - Alice Aguilar 2011
helen - helen varley jamieson 2011

WHAT IS CIVICCASE?

Modifications:

EVERYDAY TASKS

Modifications:
reperry - Robyn Perry 2011

michaelmcandrew - Michael McAndrew 2011
avaguiar - Alice Aguilar 2011
helen - helen varley jamieson 2011

PLANNING

Modifications:

CONFIGURING

Modifications:

REPORTS AND ANALYSIS

Modifications:

michaelmcandrew - Michael McAndrew 2011

EVERYDAY TASKS

Modifications:

WHAT IS SURVEY?

Modifications:

reperry - Robyn Perry 2011

adam - adam hyde 2011

avaguiar - Alice Aguilar 2011

helen - helen varley jamieson 2011

WHAT IS CIVICCAMPAIGN

Modifications:

avaguiar - Alice Aguilar 2011

WHAT YOU NEED TO KNOW

Modifications:

reperry - Robyn Perry 2011

avaguiar - Alice Aguilar 2011

helen - helen varley jamieson 2011

CAMPAIGN PLANNING

Modifications:

michaelmcandrew - Michael McAndrew 2011

SET -UP

Modifications:

reperry - Robyn Perry 2011

avaguiar - Alice Aguilar 2011

helen - helen varley jamieson 2011

EVERYDAY TASKS

Modifications:

reperry - Robyn Perry 2011

avaguiar - Alice Aguilar 2011

helen - helen varley jamieson 2011

CAMPAIGN CONFIGURATION

Modifications:

michaelmcandrew - Michael McAndrew 2011

REPORTS AND ANALYSIS

Modifications:
michaelmcandrew - Michael McAndrew 2011
adam - adam hyde 2011
avaguiar - Alice Aguilar 2011

CAMPAIGN EVERYDAY TASKS

Modifications:
michaelmcandrew - Michael McAndrew 2011

WHAT IS CIVIENGAGE?

Modifications:

WHAT IS PETITION?

Modifications:
reperry - Robyn Perry 2011
helen - helen varley jamieson 2011
avaguiar - Alice Aguilar 2011
adam - adam hyde 2011

PLANNING

Modifications:

WHAT YOU NEED TO KNOW

Modifications:
reperry - Robyn Perry 2011
adam - adam hyde 2011
avaguiar - Alice Aguilar 2011
helen - helen varley jamieson 2011

SET -UP

Modifications:
reperry - Robyn Perry 2011
adam - adam hyde 2011
avaguiar - Alice Aguilar 2011
helen - helen varley jamieson 2011

INSTALLING

Modifications:

EVERYDAY TASKS

Modifications:
reperry - Robyn Perry 2011
michaelmcandrew - Michael McAndrew 2011
avaguiar - Alice Aguilar 2011
helen - helen varley jamieson 2011

CONFIGURING

Modifications:

EVERYDAY TASKS

Modifications:

REPORTS AND ANALYSIS

Modifications:

WHAT IS GOTV VOTER TRACKING?

Modifications:

reperry - Robyn Perry 2011
avaguiar - Alice Aguilar 2011
helen - helen varley jamieson 2011

WHAT IS CIVIREPORT?

Modifications:

PLANNING

Modifications:

CONFIGURING

Modifications:

WHAT IS CIVIENGAGE?

Modifications:

reperry - Robyn Perry 2011
helen - helen varley jamieson 2011
avaguiar - Alice Aguilar 2011
adam - adam hyde 2011

WHAT YOU NEED TO KNOW

Modifications:

reperry - Robyn Perry 2011
adam - adam hyde 2011
avaguiar - Alice Aguilar 2011
helen - helen varley jamieson 2011

EVERYDAY TASKS

Modifications:

SET -UP

Modifications:

helen - helen varley jamieson 2011
avaguiar - Alice Aguilar 2011
adam - adam hyde 2011

INTRODUCTION

Modifications:

EVERYDAY TASKS

Modifications:

avaguiar - Alice Aguilar 2011
helen - helen varley jamieson 2011

REPORTS AND ANALYSIS

Modifications:

avaguiar - Alice Aguilar 2011
adam - adam hyde 2011

TEMPLATES

Modifications:

REPORTS

Modifications:

WHAT IS CIVIGRANT?

Modifications:

michaelmccandrew - Michael McAndrew 2011

adam - adam hyde 2011

helen - helen varley jamieson 2011

CUSTOM SEARCHES

Modifications:

theMusician - Max Bronsema 2011

WHAT YOU NEED TO KNOW

Modifications:

michaelmccandrew - Michael McAndrew 2011

helen - helen varley jamieson 2011

API

Modifications:

JoeMurray - Joe Murray 2011

HOOKS

Modifications:

SET-UP

Modifications:

michaelmccandrew - Michael McAndrew 2011

helen - helen varley jamieson 2011

EVERY DAY TASKS

Modifications:

michaelmccandrew - Michael McAndrew 2011

helen - helen varley jamieson 2011

IMPORTS

Modifications:

REPORTS AND ANALYSIS

Modifications:

michaelmccandrew - Michael McAndrew 2011

adam - adam hyde 2011

DEVELOPER TIPS

Modifications:

CIVICRM COMMUNITY

Modifications:

adam - adam hyde 2011

CIVICOMMUNITY

Modifications:

BUG REPORTING

Modifications:

michaelsmcandrew - Michael McAndrew 2011

avaguilar - Alice Aguilar 2011

adam - adam hyde 2011

LOCALISATION

Modifications:

BUG REPORTING

Modifications:

LOCALISING CIVICRM

Modifications:

adam - adam hyde 2011

CONTRIBUTING TO THIS MANUAL

Modifications:

adam - adam hyde 2011

HOW TO CONTRIBUTE?

Modifications:

HISTORY OF THIS BOOK

Modifications:

DavidGreenberg - David Greenberg 2011

HISTORY OF THIS BOOK

Modifications:

adam - adam hyde 2011

ABOUT FREE SOFTWARE

Modifications:

ABOUT FREE SOFTWARE

Modifications:

GLOSSARY

Modifications:

GLOSSARY

Modifications:

Abril - Abril Rocabert 2011

helen - helen varley jamieson 2011

CREDITS

Modifications:

CREDITS

Modifications:

Cover Art (faces) by Kapor Creative: Jake Mix & Trevor Parham (Jake created the illustrations, and Trevor developed the concept of the civi logos as eyes). Cover Art is CC-BY-SA

All chapters copyright of the authors (see below). Unless otherwise stated all chapters in this manual licensed with **GNU General Public License version 2**

This documentation is free documentation; you can redistribute it and/or modify it under the terms of the GNU General Public License as published by the Free Software Foundation; either version 2 of the License, or (at your option) any later version.

This documentation is distributed in the hope that it will be useful, but WITHOUT ANY WARRANTY; without even the implied warranty of MERCHANTABILITY or FITNESS FOR A PARTICULAR PURPOSE. See the GNU General Public License for more details.

You should have received a copy of the GNU General Public License along with this documentation; if not, write to the Free Software Foundation, Inc., 51 Franklin Street, Fifth Floor, Boston, MA 02110-1301, USA.

AUTHORS

ABOUT THIS BOOK

© Michael McAndrew 2010
Modifications:
adam hyde 2010
David Greenberg 2010
helen jamieson 2010

HOW TO CONTRIBUTE?

© adam hyde 2009, 2010
Modifications:
Alice Aguilar 2010
Andy Oram 2010
Brian Shaughnessy 2009
Cynthia Tarascio 2009
David Greenberg 2009
Eileen McNaughton 2009
Kyle Jaster 2010
Michael McAndrew 2009, 2010
Yashodha Chaku 2009

LOCALISATION

© adam hyde 2009, 2010
Modifications:
Alice Aguilar 2010
Andy Oram 2009, 2010
Cynthia Tarascio 2009
David Greenberg 2010
Dream Gomez 2009
Eileen McNaughton 2009
Erik Brouwer 2010
Jack Aponte 2010
Mathieu Petit-Clair 2010
Michael Lenahan 2009
Michael McAndrew 2009, 2010
Michal Mach 2009
Peter Davis 2009

BUG REPORTING

© adam hyde 2009
Modifications:
Andy Oram 2009
Cynthia Tarascio 2009

Eileen McNaughton 2009
Michael McAndrew 2009, 2010
Michal Mach 2009

INSTALLATION

© David Greenberg 2009
Modifications:
adam hyde 2009, 2010
Alice Aguilar 2010
Andy Oram 2009, 2010
Cynthia Tarascio 2009
Eileen McNaughton 2009
Kurund Jalmi 2010
Michael Gross 2009
Michael Lenahan 2009
Michael McAndrew 2009, 2010
Tony Guzman 2009

PROFILES

© adam hyde 2009, 2010
Modifications:
Alice Aguilar 2010
Andy Oram 2009
Brian Shaughnessy 2009
David Greenberg 2009, 2010
Eileen McNaughton 2009
helen jamieson 2010
jay maechtlen 2009
Kurund Jalmi 2010
Kyle Jaster 2010
Mari Tilos 2009, 2010
Michael McAndrew 2009, 2010
Michal Mach 2009
Peter Davis 2009
Tony Guzman 2009
Yashodha Chaku 2009

CONFIGURING

© adam hyde 2010
Modifications:
David Greenberg 2010
helen jamieson 2010
Kyle Jaster 2010
Lachlan Musicman 2010
xavier dutoit 2010

PLANNING

© adam hyde 2010
Modifications:
David Greenberg 2010
helen jamieson 2010
Kyle Jaster 2010
Lachlan Musicman 2010
xavier dutoit 2010

EVERYDAY TASKS

© adam hyde 2010
Modifications:
Alice Aguilar 2010
Andy Oram 2010
David Greenberg 2010
helen jamieson 2010
Kyle Jaster 2010
Michael McAndrew 2010
xavier dutoit 2010

CIVICOMMUNITY

© adam hyde 2010

Modifications:

Alice Aguilar 2010

Andy Oram 2010

Jack Aponte 2010

Michael McAndrew 2010

EXTENDING CORE DATA

© Michael McAndrew 2010

Modifications:

adam hyde 2010

Andy Oram 2010

David Greenberg 2010

Erik Hommel 2010

helen jamieson 2010

Kurund Jalmi 2010

Manuel Schmalstieg 2010

Mari Tilos 2010

xavier dutoit 2010

CONFIGURING

© adam hyde 2010

Modifications:

Alice Aguilar 2010

Andy Oram 2010

Michael McAndrew 2010

PLANNING

© adam hyde 2010

Modifications:

Andy Oram 2010

Michael McAndrew 2010

EVERYDAY TASKS

© adam hyde 2010

Modifications:

Alice Aguilar 2010

Andy Oram 2010

David Greenberg 2010

helen jamieson 2010

Mari Tilos 2010

Michael McAndrew 2010

WHAT IS CIVICCONTRIBUTE?

© adam hyde 2010

Modifications:

Andy Oram 2010

Kyle Jaster 2010

Michael McAndrew 2010

MENU AND DASHBOARD

© Michael McAndrew 2010

Modifications:

adam hyde 2010

helen jamieson 2010

Kurund Jalmi 2010

Kyle Jaster 2010

Mari Tilos 2010

CONFIGURING

© Alice Aguilar 2010

Modifications:

adam hyde 2010

David Greenberg 2010

Jack Aponte 2010

Josue Guillen 2010
Kyle Jaster 2010
Michael McAndrew 2010
Michael McCallister 2010
Tim Homewood 2010

EVERYDAY TASKS

© Alice Aguilar 2010
Modifications:
adam hyde 2010
Jack Aponte 2010
Josue Guillen 2010
Kyle Jaster 2010
Michael McAndrew 2010
Michael McCallister 2010

INSTALLING

© Alice Aguilar 2010
Modifications:
adam hyde 2010
Andy Oram 2010
Josue Guillen 2010
Kurund Jalmi 2010
Kyle Jaster 2010
Michael McAndrew 2010
Michael McCallister 2010

PLANNING

© Alice Aguilar 2010
Modifications:
adam hyde 2010
Jack Aponte 2010
Michael McAndrew 2010
Michael McCallister 2010

CONFIGURING

© adam hyde 2010
Modifications:
Andy Oram 2010
David Greenberg 2010

EVERYDAY TASKS

© adam hyde 2010
Modifications:
Alice Aguilar 2010
Andy Oram 2010
David Greenberg 2010
Mari Tilos 2010
Michael McAndrew 2010
Sarah Gladstone 2010

PLANNING

© adam hyde 2010
Modifications:
Alice Aguilar 2010
Andy Oram 2010
Michael McAndrew 2010
xavier dutoit 2010

WHAT IS CIVIEVENT?

© adam hyde 2010
Modifications:
Alice Aguilar 2010
Andy Oram 2010
Christopher Gervais 2010
Jack Aponte 2010

xavier dutoit 2010

CONFIGURING

© Kurund Jalmi 2010

Modifications:

adam hyde 2010

Alice Aguilar 2010

David Greenberg 2010

helen jamieson 2010

Michael McAndrew 2010

T WikiGuest 2010

EVERYDAY TASKS

© Michael McAndrew 2010

Modifications:

adam hyde 2010

helen jamieson 2010

Josue Guillen 2010

Kyle Jaster 2010

T WikiGuest 2010

PLANNING

© Michael McAndrew 2010

Modifications:

adam hyde 2010

Alice Aguilar 2010

helen jamieson 2010

Kurund Jalmi 2010

Kyle Jaster 2010

WHAT IS CIVIREPORT?

© Michael McAndrew 2010

Modifications:

adam hyde 2010

Alice Aguilar 2010

David Greenberg 2010

helen jamieson 2010

Kurund Jalmi 2010

Kyle Jaster 2010

Sarah Gladstone 2010

CONFIGURING

© xavier dutoit 2010

Modifications:

adam hyde 2010

Alice Aguilar 2010

Andy Oram 2010

Graham Mitchell 2010

Mathieu Lutfy 2010

Michael McAndrew 2010

Sarah Gladstone 2010

Tim Homewood 2010

IMPORTING

© Peter Davis 2009

Modifications:

adam hyde 2009, 2010

Alice Aguilar 2010

Andy Oram 2010

Cynthia Tarascio 2009

David Greenberg 2009, 2010

Eileen McNaughton 2009

helen jamieson 2010

Jack Aponte 2010

Mari T ilos 2009, 2010

Michael McAndrew 2009, 2010

Michal Mach 2009
Tony Guzman 2009

CREDITS

© adam hyde 2006, 2007, 2009, 2010

Modifications:

Cynthia Tarascio 2009

Michael McAndrew 2009, 2010

HOW DATA IS ORGANISED?

© adam hyde 2009, 2010

Modifications:

Alice Aguilar 2010

Andy Oram 2009, 2010

Brian Shaughnessy 2009

Brylie Oxley 2010

Cynthia Tarascio 2009

David Greenberg 2009

Eileen McNaughton 2009

helen jamieson 2010

Jack Aponte 2010

jay maechtlen 2009

Janet Swisher 2009

Kurund Jalmi 2010

Mari T ilos 2009, 2010

Michael Lenahan 2009

Michael McAndrew 2009, 2010

Peter Davis 2009

TWikiGuest 2009

Tony Guzman 2009

xavier dutoit 2010

DEDUPING AND MERGING

© Jack Aponte 2010

Modifications:

adam hyde 2010

Alice Aguilar 2010

Andy Oram 2010

David Greenberg 2010

helen jamieson 2010

Jeff Sherk 2010

Kyle Jaster 2010

Mari T ilos 2010

xavier dutoit 2010

API

© Wes Morgan 2010

Modifications:

adam hyde 2010

Brylie Oxley 2010

helen jamieson 2010

Josue Guillen 2010

Kyle Jaster 2010

Michael McAndrew 2010

xavier dutoit 2010

CUSTOM SEARCHES

© Wes Morgan 2010

Modifications:

adam hyde 2010

helen jamieson 2010

Josue Guillen 2010

Kyle Jaster 2010

Michael McAndrew 2010

Sarah Gladstone 2010

HOOKS

© Wes Morgan 2010

Modifications:

adam hyde 2010

Alice Aguilar 2010

Andy Oram 2010

Kyle Jaster 2010

Mathieu Lutfy 2010

Michael McAndrew 2010

xavier dutoit 2010

IMPORTS

© Wes Morgan 2010

Modifications:

adam hyde 2010

Andy Oram 2010

Josue Guillen 2010

Kyle Jaster 2010

Michael McAndrew 2010

INTRODUCTION

© Wes Morgan 2010

Modifications:

adam hyde 2010

Andy Oram 2010

Kyle Jaster 2010

Michael McAndrew 2010

Michael McCallister 2010

xavier dutoit 2010

REPORTS

© Wes Morgan 2010

Modifications:

adam hyde 2010

Andy Oram 2010

Erik Hommel 2010

Kurund Jalmi 2010

Kyle Jaster 2010

Michael McAndrew 2010

xavier dutoit 2010

TEMPLATES

© Wes Morgan 2010

Modifications:

adam hyde 2010

Andy Oram 2010

Josue Guillen 2010

Kyle Jaster 2010

Michael McAndrew 2010

Michael McCallister 2010

Sarah Gladstone 2010

xavier dutoit 2010

DEVELOPER TIPS

© Wes Morgan 2010

Modifications:

adam hyde 2010

Andy Oram 2010

Kurund Jalmi 2010

Kyle Jaster 2010

Michael McAndrew 2010

xavier dutoit 2010

EXPORTING

© Kurund Jalmi 2010

Modifications:
adam hyde 2010
Alice Aguilar 2010
Andy Oram 2010
David Greenberg 2010
helen jamieson 2010
Michael McAndrew 2010

EVERYDAY TASKS

© xavier dutoit 2010
Modifications:
adam hyde 2010
Andy Oram 2010
David Greenberg 2010
Josue Guillen 2010
Michael McAndrew 2010

REAL WORLD EXAMPLES

© adam hyde 2009, 2010
Modifications:
Andy Oram 2009
Brian Shaughnessy 2009
Cynthia Tarascio 2009
David Greenberg 2009
Eileen McNaughton 2009
helen jamieson 2010
jay maechtlen 2009
Mari Tilos 2009, 2010
Michael Lenahan 2009
Michael McAndrew 2009, 2010
Michael McCallister 2010
Peter Davis 2009
Roberto Santiago 2009
Tony Guzman 2009

ABOUT FREE SOFTWARE

© Michal Mach 2009
Modifications:
adam hyde 2009, 2010
Cynthia Tarascio 2009
Mari Tilos 2009
Michael McAndrew 2009, 2010

EVERYDAY TASKS

© Jack Aponte 2010
Modifications:
adam hyde 2010
helen jamieson 2010
Michael McAndrew 2010
Tim Homewood 2010

GLOSSARY

© adam hyde 2009, 2010
Modifications:
Cynthia Tarascio 2009
David Greenberg 2009
Eileen McNaughton 2009
helen jamieson 2010
Kurund Jalmi 2009, 2010
Lachlan Musicman 2010
Mari Tilos 2009
Michael McAndrew 2009, 2010
Michal Mach 2009
Tony Guzman 2009

TAGS AND GROUPS

© adam hyde 2009, 2010
Modifications:
Andy Oram 2009, 2010
Cynthia Tarascio 2009
Eileen McNaughton 2009
helen jamieson 2010
Jack Aponte 2010
Kurund Jalmi 2010
Kyle Jaster 2010
Mari Tilos 2010
Michael McAndrew 2009, 2010
Michal Mach 2009
Peter Davis 2009
Tony Guzman 2009
xavier dutoit 2010
Yashodha Chaku 2009

CONTACTS

© adam hyde 2009, 2010
Modifications:
alan zucker 2009
Andy Oram 2009
David Greenberg 2009
Eileen McNaughton 2009
helen jamieson 2010
Kurund Jalmi 2010
Kyle Jaster 2010
Mari Tilos 2009, 2010
Michael McAndrew 2009
Michal Mach 2009
Peter Davis 2009
T WikiGuest 2009
Yashodha Chaku 2009

HISTORY OF THIS BOOK

© Michael McAndrew 2010
Modifications:
Alice Aguilar 2010
Andy Oram 2010
Sarah Gladstone 2010

WHAT IS CIVICRM?

© Michal Mach 2009
Modifications:
adam hyde 2009, 2010
Andy Oram 2010
Cynthia Tarascio 2009
David Greenberg 2009
Eileen McNaughton 2009
Michael Lenahan 2009
Michael McAndrew 2009, 2010
Michael McCallister 2010
Peter Davis 2009

IS CIVICRM FOR YOU?

© adam hyde 2009, 2010
Modifications:
Alan Schacter 2009
Andy Oram 2009
Benjamin Melançon 2010
Cynthia Tarascio 2009
Duncan Hutty 2009
Eileen McNaughton 2009
helen jamieson 2010
Jack Aponte 2010

Janet Swisher 2009
Mari Tilos 2010
Michael McAndrew 2009, 2010
Michal Mach 2009
Peter Davis 2009
Tony Guzman 2009

POSTAL MAIL

© adam hyde 2009, 2010
Modifications:
Brian Shaughnessy 2009
Cynthia Tarascio 2009
David Greenberg 2010
helen jamieson 2010
Michael McAndrew 2009, 2010
Michal Mach 2009
Tony Guzman 2009
xavier dutoit 2010

WHAT IS CIVIMEMBER?

© adam hyde 2009, 2010
Modifications:
Andy Oram 2009, 2010
Brian Shaughnessy 2009
Cynthia Tarascio 2009
Eileen McNaughton 2009
Kurund Jalmi 2010
Kyle Jaster 2010
Mari Tilos 2009
Michael McAndrew 2009, 2010
T WikiGuest 2009
Tony Guzman 2009
Tracy Smith 2009

EVERYDAY TASKS

© adam hyde 2009, 2010
Modifications:
Alice Aguilar 2010
Andy Oram 2010
Brian Shaughnessy 2009
David Greenberg 2010
Eileen McNaughton 2009
Kurund Jalmi 2010
Kyle Jaster 2010
Michael McAndrew 2009, 2010
Michal Mach 2009
T WikiGuest 2009
Tony Guzman 2009

CONFIGURING

© adam hyde 2009, 2010
Modifications:
Alice Aguilar 2010
Andy Oram 2010
Brian Shaughnessy 2009
Cynthia Tarascio 2009
David Greenberg 2010
Eileen McNaughton 2009
Kurund Jalmi 2010
Kyle Jaster 2010
Mari Tilos 2009
Michael Lenahan 2009
Michael McAndrew 2009, 2010
Michal Mach 2009
Tony Guzman 2009

PLANNING

© adam hyde 2009, 2010

Modifications:

Andy Oram 2010

Brian Shaughnessy 2009

Eileen McNaughton 2009

Joe Murray 2010

Kurund Jalmi 2010

Kyle Jaster 2010

Mari Tilos 2009

Michael McAndrew 2009, 2010

T WikiGuest 2009

Tony Guzman 2009

ORGANISATIONAL ANALYSIS

© adam hyde 2009, 2010

Modifications:

Alan Schacter 2009

Andy Oram 2009, 2010

Cynthia Tarascio 2009

Eileen McNaughton 2009

helen jamieson 2010

Janet Swisher 2009

Mari Tilos 2010

Michael Lenahan 2009

Michael McAndrew 2009, 2010

Michal Mach 2009

Peter Davis 2009

Phil Mocek 2010

Tony Guzman 2009

PLANNING

© xavier dutoit 2010

Modifications:

adam hyde 2010

Andy Oram 2010

Josue Guillen 2010

Michael McAndrew 2010

T WikiGuest 2010

PROJECT MANAGEMENT

© adam hyde 2009, 2010

Modifications:

Alan Schacter 2009

Andy Oram 2009, 2010

Cynthia Tarascio 2009

David Greenberg 2009

Eileen McNaughton 2009

Erik Hommel 2010

helen jamieson 2010

Jack Aponte 2010

Janet Swisher 2009

Joe Murray 2010

Mari Tilos 2009, 2010

Michael Lenahan 2009

Michael McAndrew 2009, 2010

Michal Mach 2009

Peter Davis 2009

Tony Guzman 2009

SEARCHING

© adam hyde 2009, 2010

Modifications:

Alice Aguilar 2010

Andy Oram 2010

David Greenberg 2009, 2010
Eileen McNaughton 2009
helen jamieson 2010
Kurund Jalmi 2009, 2010
Kyle Jaster 2010
Mari Tilos 2010
Michael McAndrew 2009, 2010
Michal Mach 2009
Peter Davis 2009
Tony Guzman 2009
Yashodha Chaku 2009

SYSTEM CONFIGURATION

© xavier dutoit 2010
Modifications:
adam hyde 2010
Andy Oram 2010
Christoph Berendes 2010
Joe Murray 2010
Kurund Jalmi 2010
Michael McAndrew 2010

WHAT IS CIVIENGAGE?

© Alice Aguilar 2010
Modifications:
adam hyde 2010
Josue Guillen 2010
Kurund Jalmi 2010
Kyle Jaster 2010
Michael McAndrew 2010
Michael McCallister 2010
Tim Homewood 2010

WHAT IS CIVIMAIL?

© xavier dutoit 2010
Modifications:
adam hyde 2010
Andy Oram 2010
Graham Mitchell 2010
Lachlan Musicman 2010
Michael McAndrew 2010
T WikiGuest 2010

WHAT IS CIVICASE?

© adam hyde 2010
Modifications:
Andy Oram 2010
helen jamieson 2010
Josue Guillen 2010
Kyle Jaster 2010
Lachlan Musicman 2010
xavier dutoit 2010

WHO IS CIVICRM?

© adam hyde 2009, 2010
Modifications:
David Greenberg 2009
Eileen McNaughton 2009
Jack Aponte 2010
Mari Tilos 2010
Michael Lenahan 2009
Michael McAndrew 2009, 2010
Michael McCallister 2010
Michal Mach 2009
Peter Davis 2009

GENERAL PUBLIC LICENSE

Version 2, June 1991

Copyright (C) 1989, 1991 Free Software Foundation, Inc.
51 Franklin Street, Fifth Floor, Boston, MA 02110-1301, USA

Everyone is permitted to copy and distribute verbatim copies of this license document, but changing it is not allowed.

Preamble

The licenses for most software are designed to take away your freedom to share and change it. By contrast, the GNU General Public License is intended to guarantee your freedom to share and change free software--to make sure the software is free for all its users. This General Public License applies to most of the Free Software Foundation's software and to any other program whose authors commit to using it. (Some other Free Software Foundation software is covered by the GNU Lesser General Public License instead.) You can apply it to your programs, too.

When we speak of free software, we are referring to freedom, not price. Our General Public Licenses are designed to make sure that you have the freedom to distribute copies of free software (and charge for this service if you wish), that you receive source code or can get it if you want it, that you can change the software or use pieces of it in new free programs; and that you know you can do these things.

To protect your rights, we need to make restrictions that forbid anyone to deny you these rights or to ask you to surrender the rights. These restrictions translate to certain responsibilities for you if you distribute copies of the software, or if you modify it.

For example, if you distribute copies of such a program, whether gratis or for a fee, you must give the recipients all the rights that you have. You must make sure that they, too, receive or can get the source code. And you must show them these terms so they know their rights.

We protect your rights with two steps: (1) copyright the software, and (2) offer you this license which gives you legal permission to copy, distribute and/or modify the software.

Also, for each author's protection and ours, we want to make certain that everyone understands that there is no warranty for this free software. If the software is modified by someone else and passed on, we want its recipients to know that what they have is not the original, so that any problems introduced by others will not reflect on the original authors' reputations.

Finally, any free program is threatened constantly by software patents. We wish to avoid the danger that redistributors of a free program will individually obtain patent licenses, in effect making the program proprietary. To prevent this, we have made it clear that any patent must be licensed for everyone's free use or not licensed at all.

The precise terms and conditions for copying, distribution and modification follow.

TERMS AND CONDITIONS FOR COPYING, DISTRIBUTION AND MODIFICATION

0. This License applies to any program or other work which contains a notice placed by the copyright holder saying it may be distributed under the terms of this General Public License. The "Program", below, refers to any such program or work, and a "work based on the Program" means either the Program or any derivative work under copyright law: that is to say, a work containing the Program or a portion of it, either verbatim or with modifications and/or translated into another language. (Hereinafter, translation is included without limitation in the term "modification".) Each licensee is addressed as "you".

Activities other than copying, distribution and modification are not covered by this License; they are outside its scope. The act of running the Program is not restricted, and the output from the Program is covered only if its contents constitute a work based on the Program (independent of having been made by running the Program). Whether that is true depends on what the Program does.

1. You may copy and distribute verbatim copies of the Program's source code as you receive it, in any medium, provided that you conspicuously and appropriately publish on each copy an appropriate copyright notice and disclaimer of warranty; keep intact all the notices that refer to this License and to the absence of any warranty; and give any other recipients of the Program a copy of this License along with the Program.

You may charge a fee for the physical act of transferring a copy, and you may at your option offer warranty protection in exchange for a fee.

2. You may modify your copy or copies of the Program or any portion of it, thus forming a work based on the Program, and copy and distribute such modifications or work under the terms of Section 1 above, provided that you also meet all of these conditions:

a) You must cause the modified files to carry prominent notices stating that you changed the files and the date of any change.

b) You must cause any work that you distribute or publish, that in whole or in part contains or is derived from the Program or any part thereof, to be licensed as a whole at no charge to all third parties under the terms of this License.

c) If the modified program normally reads commands interactively when run, you must cause it, when started running for such interactive use in the most ordinary way, to print or display an announcement including an appropriate copyright notice and a notice that there is no warranty (or else, saying that you provide a warranty) and that users may redistribute the program under these conditions, and telling the user how to view a copy of this License. (Exception: if the Program itself is interactive but does not normally print such an announcement, your work based on the Program is not required to print an announcement.)

These requirements apply to the modified work as a whole. If identifiable sections of that work are not derived from the Program, and can be reasonably considered independent and separate works in themselves, then this License, and its terms, do not apply to those sections when you distribute them as separate works. But when you distribute the same sections as part of a whole which is a work based on the Program, the distribution of the whole must be on the terms of this License, whose permissions for other licensees extend to the entire whole, and thus to each and every part regardless of who wrote it.

Thus, it is not the intent of this section to claim rights or contest your rights to work written entirely by you; rather, the intent is to exercise the right to control the distribution of derivative or collective works based on the Program.

In addition, mere aggregation of another work not based on the Program with the Program (or with a work based on the Program) on a volume of a storage or distribution medium does not bring the other work under the scope of this License.

3. You may copy and distribute the Program (or a work based on it, under Section 2) in object code or executable form under the terms of Sections 1 and 2 above provided that you also do one of the following:

a) Accompany it with the complete corresponding machine-readable source code, which must be distributed under the terms of Sections 1 and 2 above on a medium customarily

used for software interchange; or,

b) Accompany it with a written offer, valid for at least three years, to give any third party, for a charge no more than your cost of physically performing source distribution, a complete machine-readable copy of the corresponding source code, to be distributed under the terms of Sections 1 and 2 above on a medium customarily used for software interchange; or,

c) Accompany it with the information you received as to the offer to distribute corresponding source code. (This alternative is allowed only for noncommercial distribution and only if you received the program in object code or executable form with such an offer, in accord with Subsection b above.)

The source code for a work means the preferred form of the work for making modifications to it. For an executable work, complete source code means all the source code for all modules it contains, plus any associated interface definition files, plus the scripts used to control compilation and installation of the executable. However, as a special exception, the source code distributed need not include anything that is normally distributed (in either source or binary form) with the major components (compiler, kernel, and so on) of the operating system on which the executable runs, unless that component itself accompanies the executable.

If distribution of executable or object code is made by offering access to copy from a designated place, then offering equivalent access to copy the source code from the same place counts as distribution of the source code, even though third parties are not compelled to copy the source along with the object code.

4. You may not copy, modify, sublicense, or distribute the Program except as expressly provided under this License. Any attempt otherwise to copy, modify, sublicense or distribute the Program is void, and will automatically terminate your rights under this License. However, parties who have received copies, or rights, from you under this License will not have their licenses terminated so long as such parties remain in full compliance.

5. You are not required to accept this License, since you have not signed it. However, nothing else grants you permission to modify or distribute the Program or its derivative works. These actions are prohibited by law if you do not accept this License. Therefore, by modifying or distributing the Program (or any work based on the Program), you indicate your acceptance of this License to do so, and all its terms and conditions for copying, distributing or modifying the Program or works based on it.

6. Each time you redistribute the Program (or any work based on the Program), the recipient automatically receives a license from the original licensor to copy, distribute or modify the Program subject to these terms and conditions. You may not impose any further restrictions on the recipients' exercise of the rights granted herein. You are not responsible for enforcing compliance by third parties to this License.

7. If, as a consequence of a court judgment or allegation of patent infringement or for any other reason (not limited to patent issues), conditions are imposed on you (whether by court order, agreement or otherwise) that contradict the conditions of this License, they do not excuse you from the conditions of this License. If you cannot distribute so as to satisfy simultaneously your obligations under this License and any other pertinent obligations, then as a consequence you may not distribute the Program at all. For example, if a patent license would not permit royalty-free redistribution of the Program by all those who receive copies directly or indirectly through you, then the only way you could satisfy both it and this License would be to refrain entirely from distribution of the Program.

If any portion of this section is held invalid or unenforceable under any particular circumstance, the balance of the section is intended to apply and the section as a whole is intended to apply in other circumstances.

It is not the purpose of this section to induce you to infringe any patents or other property right claims or to contest validity of any such claims; this section has the sole purpose of protecting the integrity of the free software distribution system, which is implemented by public license practices. Many people have made generous contributions to the wide range of software distributed through that system in reliance on consistent application of that system; it is up to the author/donor to decide if he or she is willing to distribute software through any other system and a licensee cannot impose that choice.

This section is intended to make thoroughly clear what is believed to be a consequence of the rest of this License.

8. If the distribution and/or use of the Program is restricted in certain countries either by patents or by copyrighted interfaces, the original copyright holder who places the Program under this License may add an explicit geographical distribution limitation excluding those countries, so that distribution is permitted only in or among countries not thus excluded. In such case, this License incorporates the limitation as if written in the body of this License.

9. The Free Software Foundation may publish revised and/or new versions of the General Public License from time to time. Such new versions will be similar in spirit to the present version, but may differ in detail to address new problems or concerns.

Each version is given a distinguishing version number. If the Program specifies a version number of this License which applies to it and "any later version", you have the option of following the terms and conditions either of that version or of any later version published by the Free Software Foundation. If the Program does not specify a version number of this License, you may choose any version ever published by the Free Software Foundation.

10. If you wish to incorporate parts of the Program into other free programs whose distribution conditions are different, write to the author to ask for permission. For software which is copyrighted by the Free Software Foundation, write to the Free Software Foundation; we sometimes make exceptions for this. Our decision will be guided by the two goals of preserving the free status of all derivatives of our free software and of promoting the sharing and reuse of software generally.

NO WARRANTY

11. BECAUSE THE PROGRAM IS LICENSED FREE OF CHARGE, THERE IS NO WARRANTY FOR THE PROGRAM, TO THE EXTENT PERMITTED BY APPLICABLE LAW. EXCEPT WHEN OTHERWISE STATED IN WRITING THE COPYRIGHT HOLDERS AND/OR OTHER PARTIES PROVIDE THE PROGRAM "AS IS" WITHOUT WARRANTY OF ANY KIND, EITHER EXPRESSED OR IMPLIED, INCLUDING, BUT NOT LIMITED TO, THE IMPLIED WARRANTIES OF MERCHANTABILITY AND FITNESS FOR A PARTICULAR PURPOSE. THE ENTIRE RISK AS TO THE QUALITY AND PERFORMANCE OF THE PROGRAM IS WITH YOU. SHOULD THE PROGRAM PROVE DEFECTIVE, YOU ASSUME THE COST OF ALL NECESSARY SERVICING, REPAIR OR CORRECTION.

12. IN NO EVENT UNLESS REQUIRED BY APPLICABLE LAW OR AGREED TO IN WRITING WILL ANY COPYRIGHT HOLDER, OR ANY OTHER PARTY WHO MAY MODIFY AND/OR REDISTRIBUTE THE PROGRAM AS PERMITTED ABOVE, BE LIABLE TO YOU FOR DAMAGES, INCLUDING ANY GENERAL, SPECIAL, INCIDENTAL OR CONSEQUENTIAL DAMAGES ARISING OUT OF THE USE OR INABILITY TO USE THE PROGRAM (INCLUDING BUT NOT LIMITED TO LOSS OF DATA OR DATA BEING RENDERED INACCURATE OR LOSSES SUSTAINED BY YOU OR THIRD PARTIES OR A FAILURE OF THE PROGRAM TO OPERATE WITH ANY OTHER PROGRAMS), EVEN IF SUCH HOLDER OR OTHER PARTY HAS BEEN ADVISED OF THE POSSIBILITY OF SUCH DAMAGES.

END OF TERMS AND CONDITIONS