FLOSS
MANUALS

Table Of Contents

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.

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.

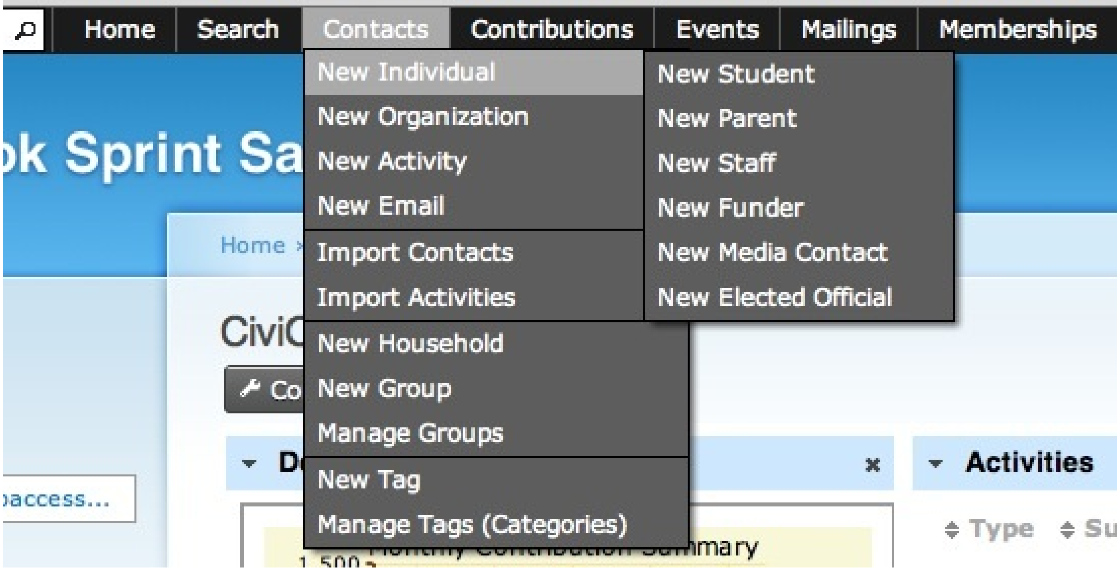
You can define further **contact types** to suit your needs, for example "students", "farms" or "churches". Each contact type you define is based on one of the three core contact types. For example, students would based on the individual contact type, and farms could be based on the organisation contact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

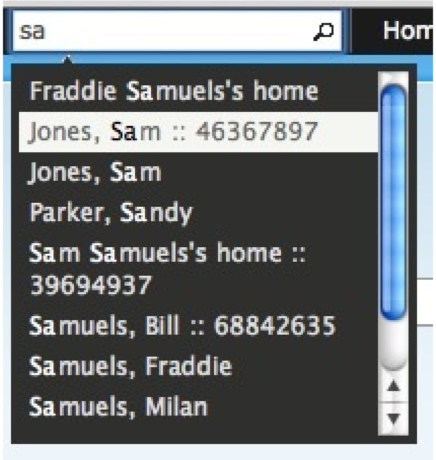
- Save will save the contact record and take you to the contact screen.
- Save and New will save the contact and clear the form so that you can add another.
- Cancel will discard the entered information and return you to your CiviCRM dashboard.

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.

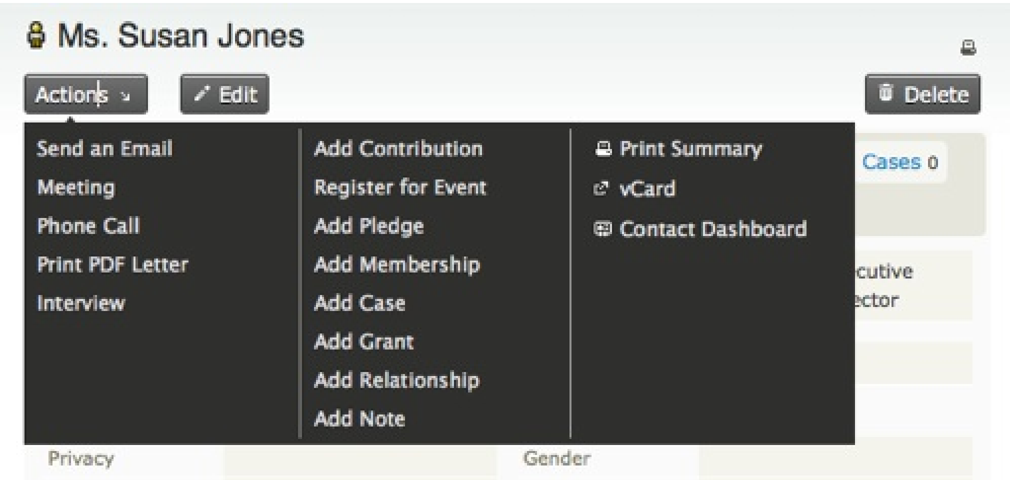
Below is a search for "sa" that has returned Sam Jones, as well as other contacts with the letter combination "sa":



;

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.

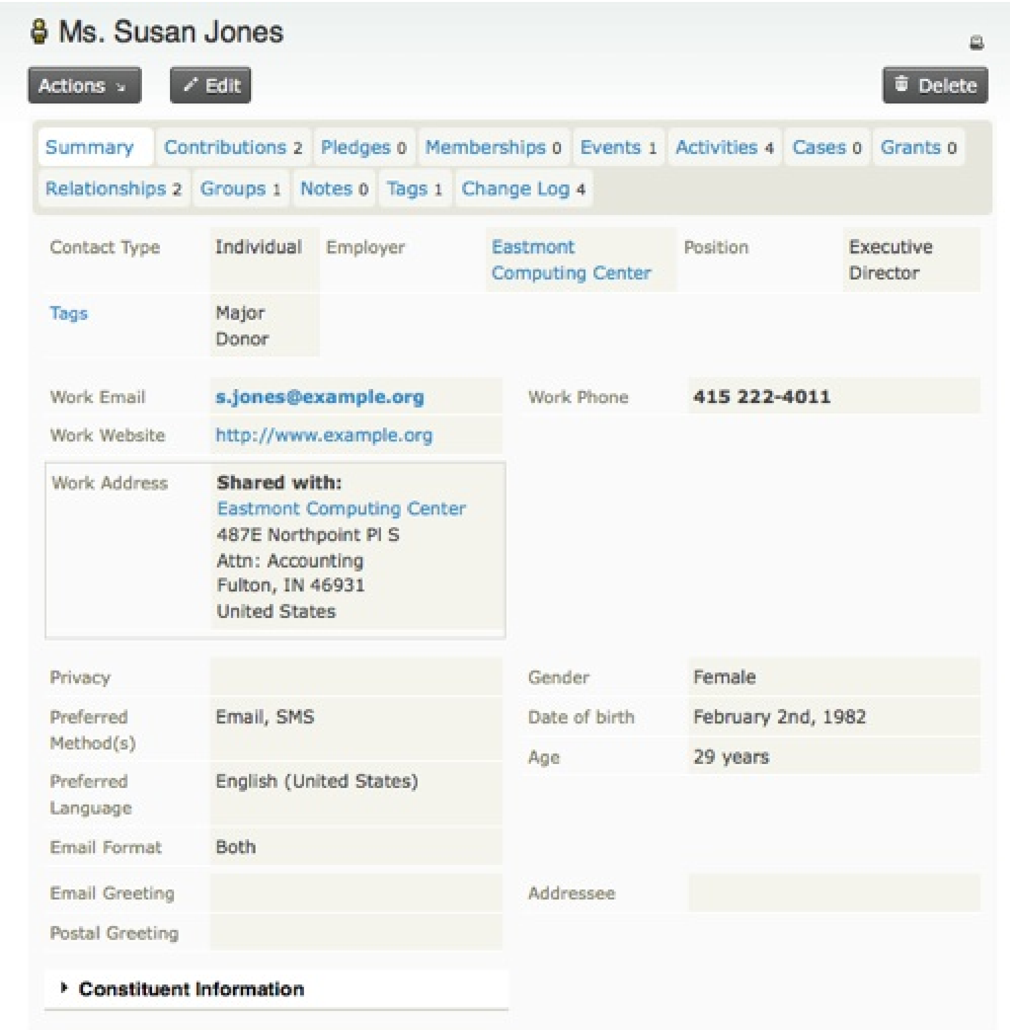
Contact tabs

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.



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.

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.

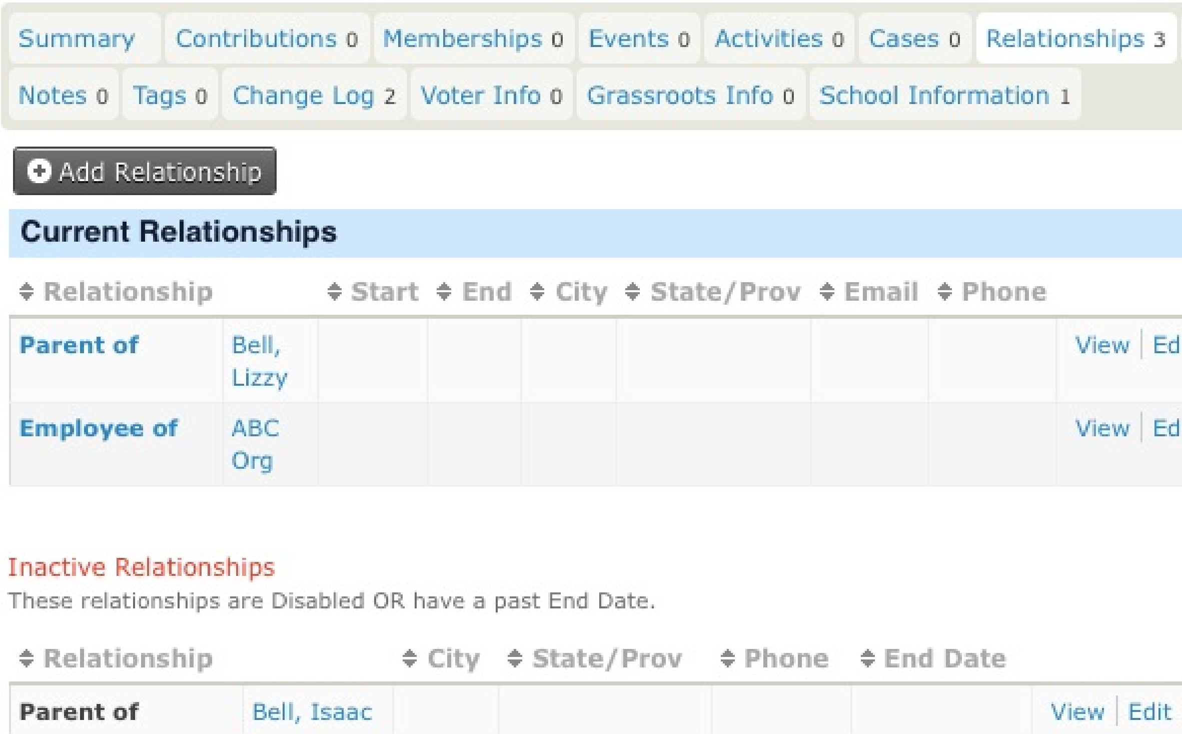
CiviCRM can hold more than one location for a contact. For example, if a person has a home address, a billing address and a work address, these can be recorded as separate locations. One of these locations will be marked as Primary. It will be used for any postal mailings that you do. You can explicitly 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.



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.

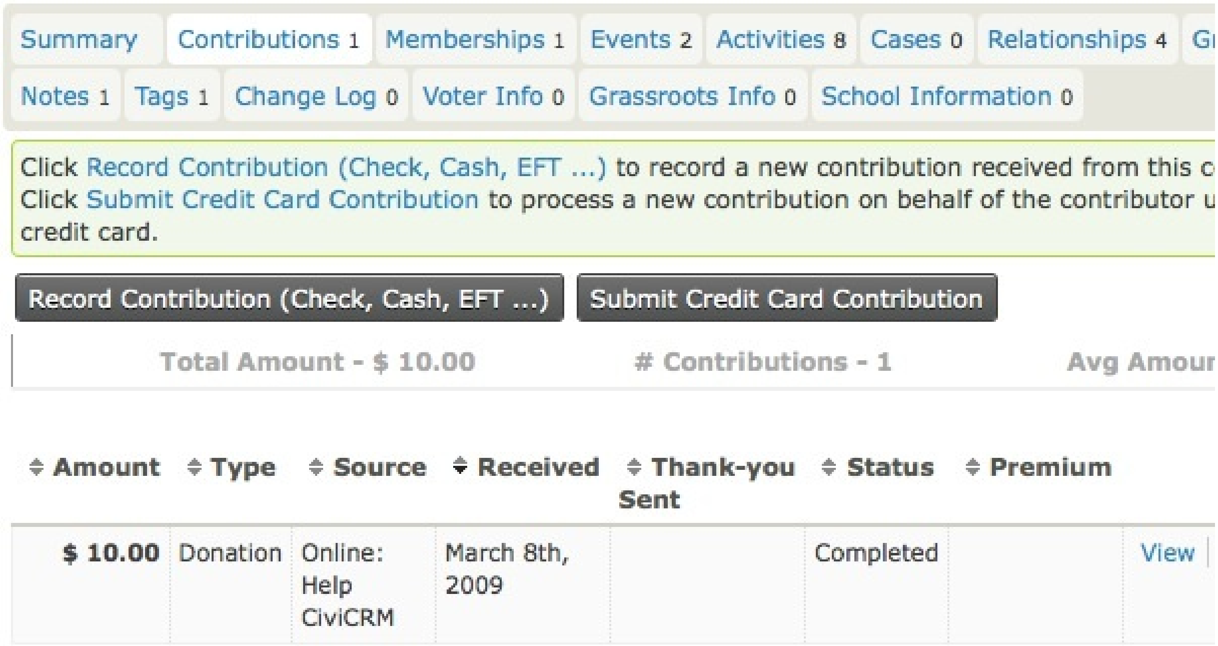
Activities are a great way to store interactions that happen at a specific time, or that link specific people. If it is important for you to know who at your organisation carried out a task, then record it as an activity. Another advantage of activities is that they record when something has happened, 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.

Contributions tab

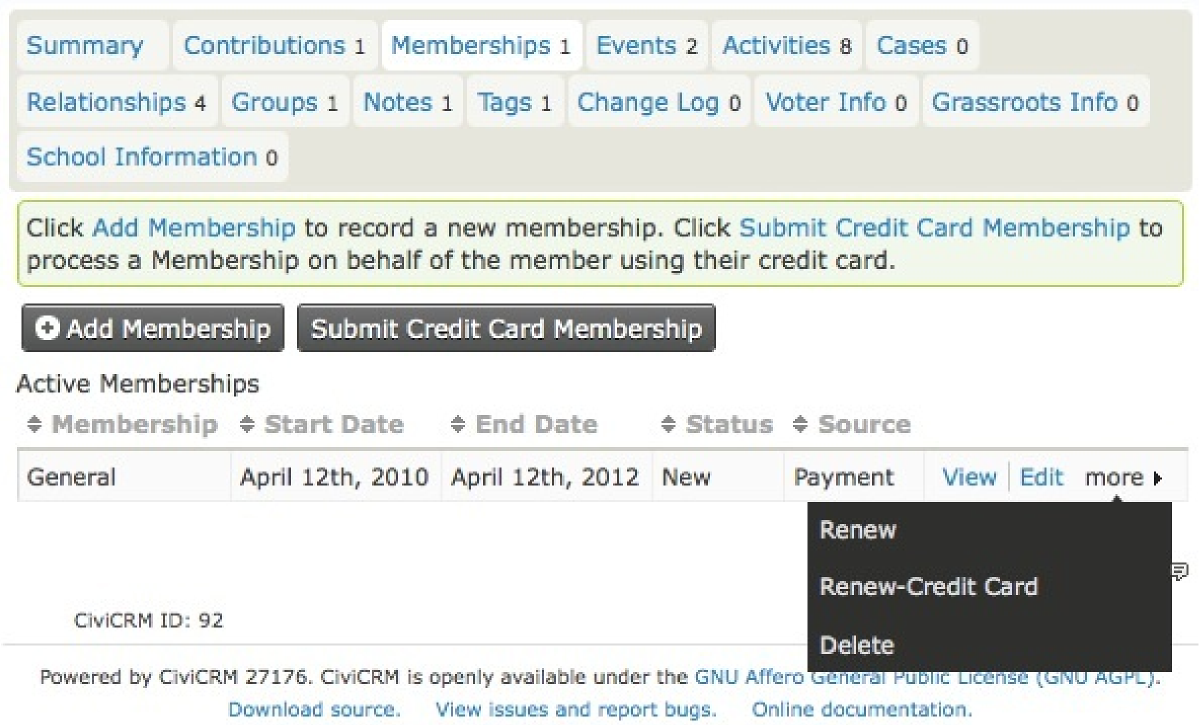
The Contributions tab shows any financial contributions made by the contact whose details you are viewing, as well as a summary of the contribution activity of the contact (total amount of contributions over time, total number of contributions, and average amount of contributions).

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.



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.



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.

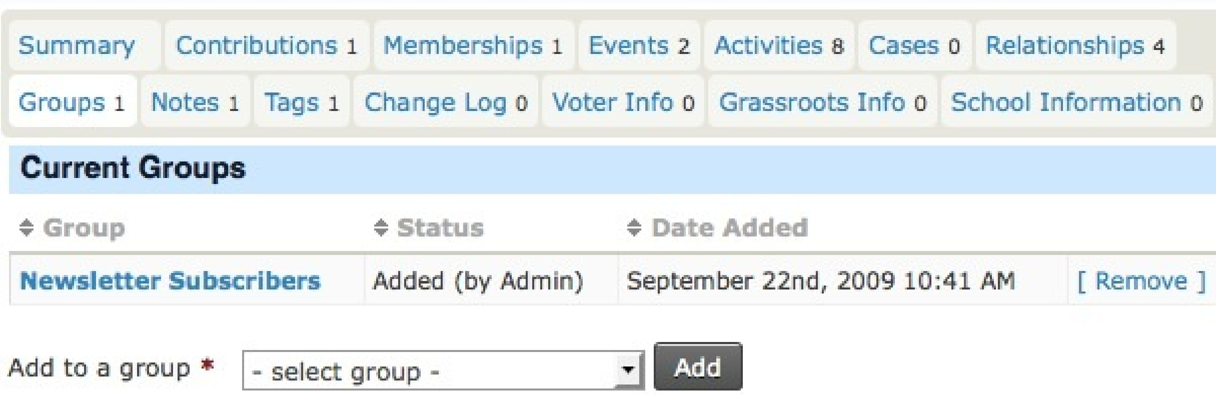
You can also modify the event information as it relates to the contact by clicking the Edit link. For example, you can change the contact's event status from "registered" to "attended".

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 (**ACL**s).

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.



Notes tab

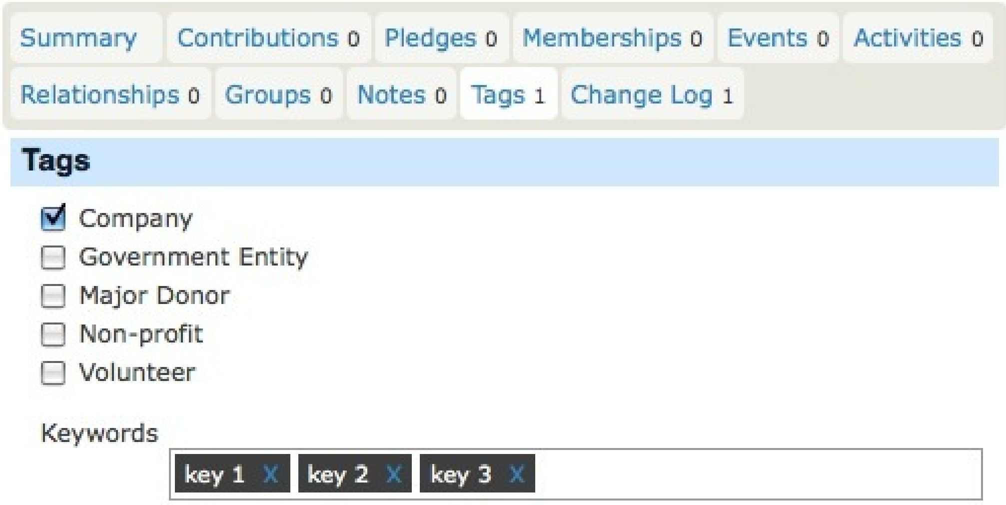
The Notes tab is a place where you can record random bits of information about a contact. Generally you would use custom fields for information you plan to collect about your contacts, but in some cases it may be useful to record additional, ad-hoc notes about a contact. Since this information is unstructured, 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.

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.



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.

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.

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**.

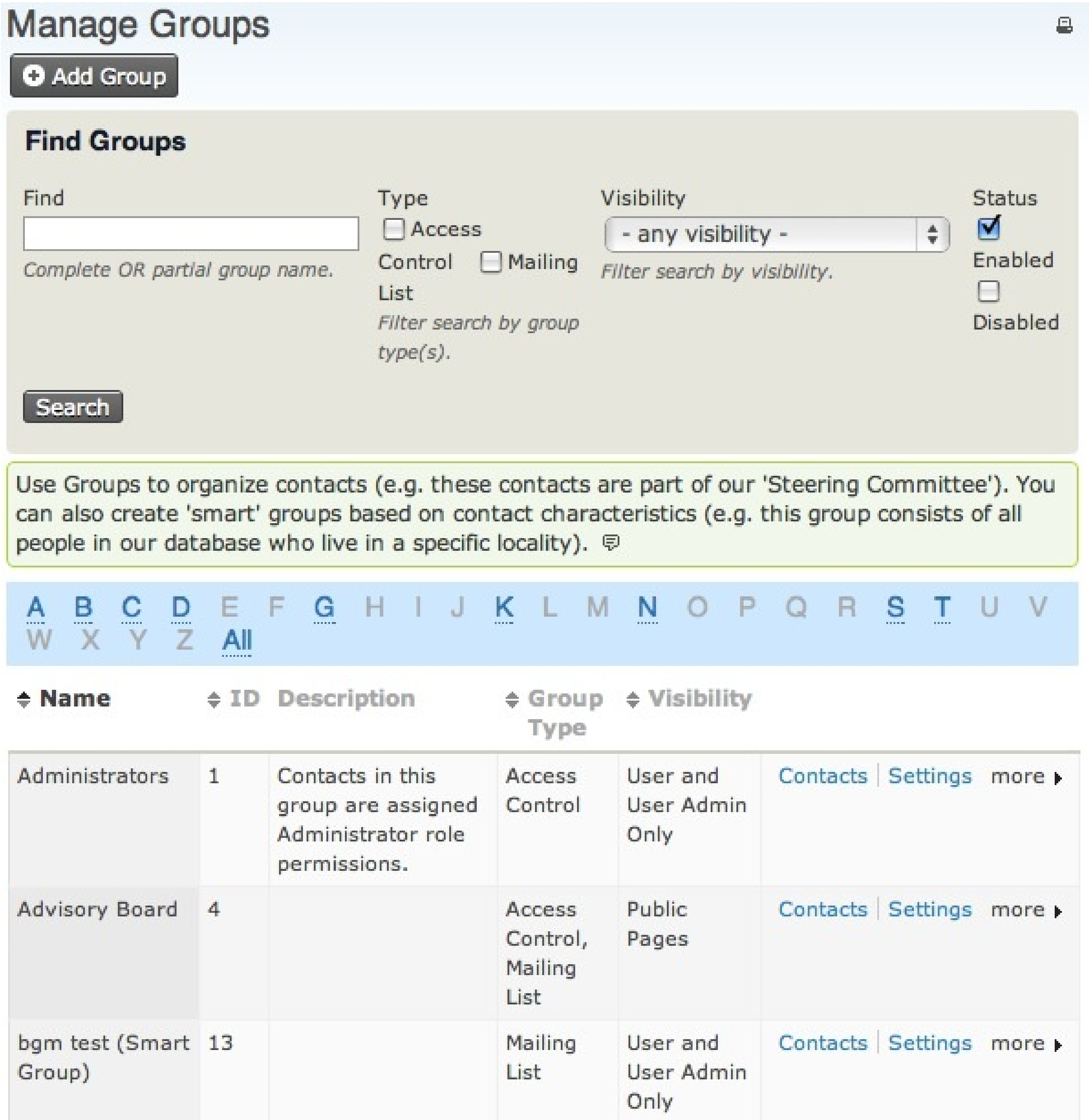
The first two methods also allow you to remove individual contacts from a group. The last two methods allow you to add multiple contacts to groups at once.

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.

Contacts can also be added to a group as a result of filling out a Profile (see below).

Managing Groups

To view and manage all groups, go to: Navigation Menu > Contacts > Manage Groups.



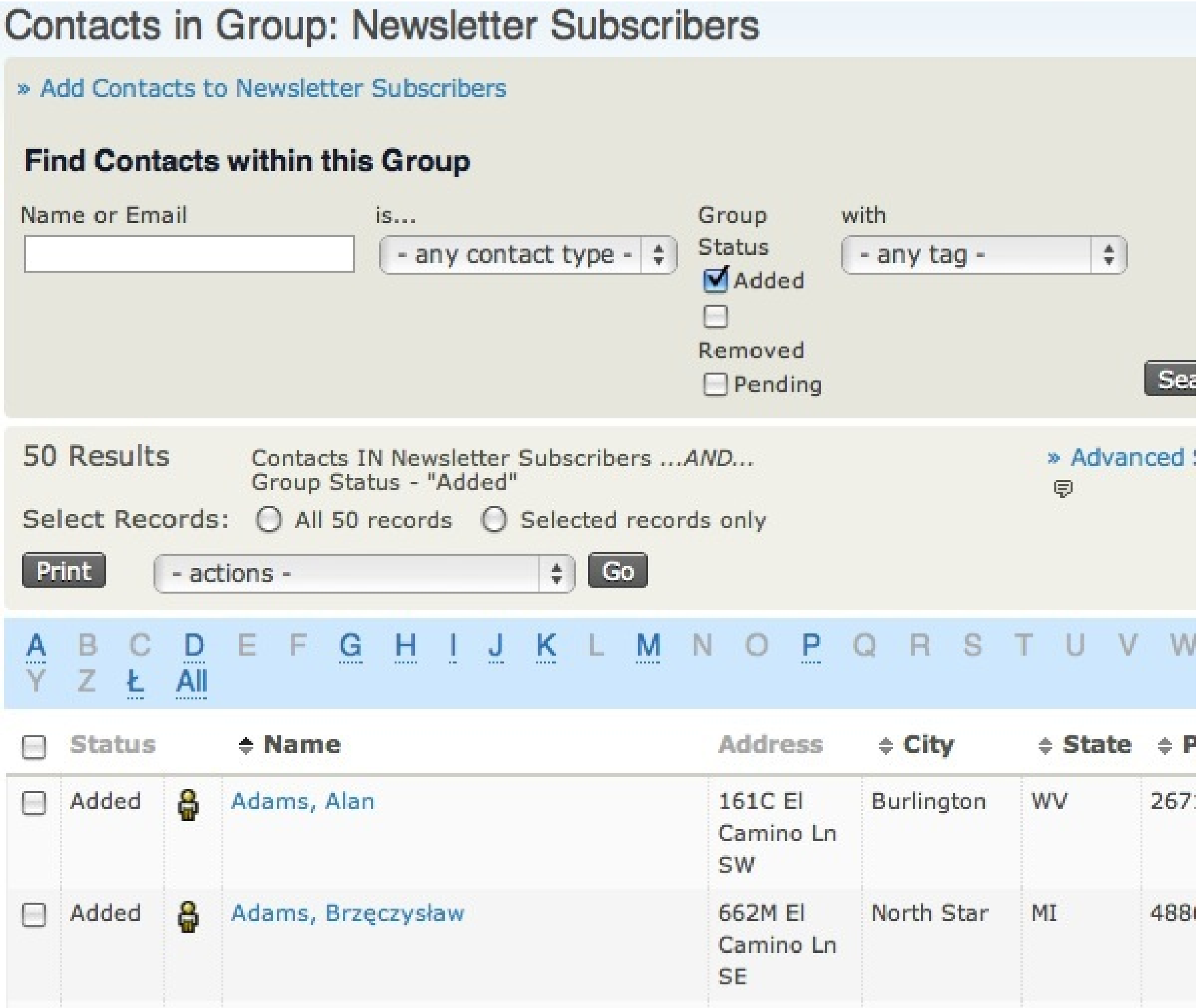
You can use the Find Groups form at the top of the Manage Groups screen to search for groups by name, type, visibility and whether the group is enabled or disabled. You can also scroll or browse through the list of groups further down the Manage Groups screen. This list includes both regular and smart groups.

You can:

- add contacts to a group by clicking the Contacts link in the group's row
- edit the group by clicking the Settings link
- disable or delete a group using the links in the "more" pop-up menu.

Finding contacts in a group

The Contacts page for each group includes a form for finding contacts within the group. You can search contacts within a group by name, email address, contact type, group status (added, removed, or pending) and tags.



Creating smart groups

Smart group 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.

Smart groups can be created from the search results generated by any of the search forms. For example, you can create 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. To create this smart group:

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

Scroll down to the Contributions section and click on Contributions.

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

Click Search at the bottom of the page.

Click the button that selects all the records

From the " - more actions - " dropdown menu select New Smart Group, then click Go.

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**.

You can view your smart group by going to: **Contacts > Manage Groups** where you will see your smart group in the list.

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:

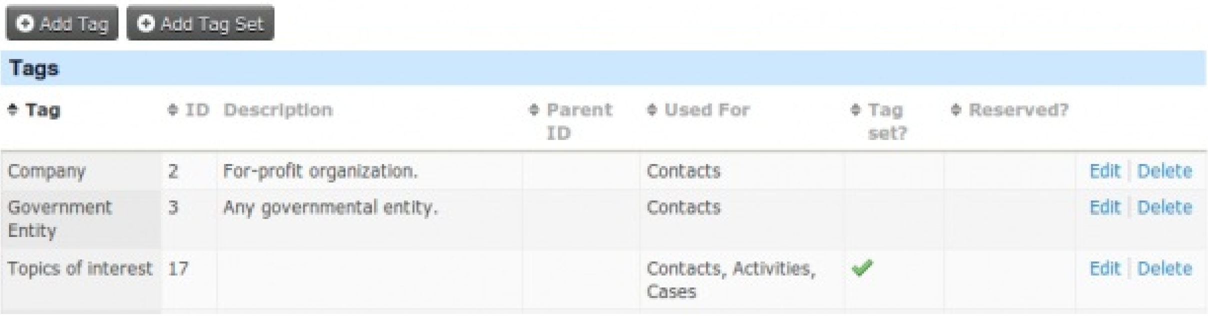
- A normal group containing a contact record for each corresponding user who is part of an Organic Group. This group is assigned the same name as the linked Organic Group.
- An access control group containing the contact record of the administrator of the corresponding Organic Group. This gives the OG 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 this 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.

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:

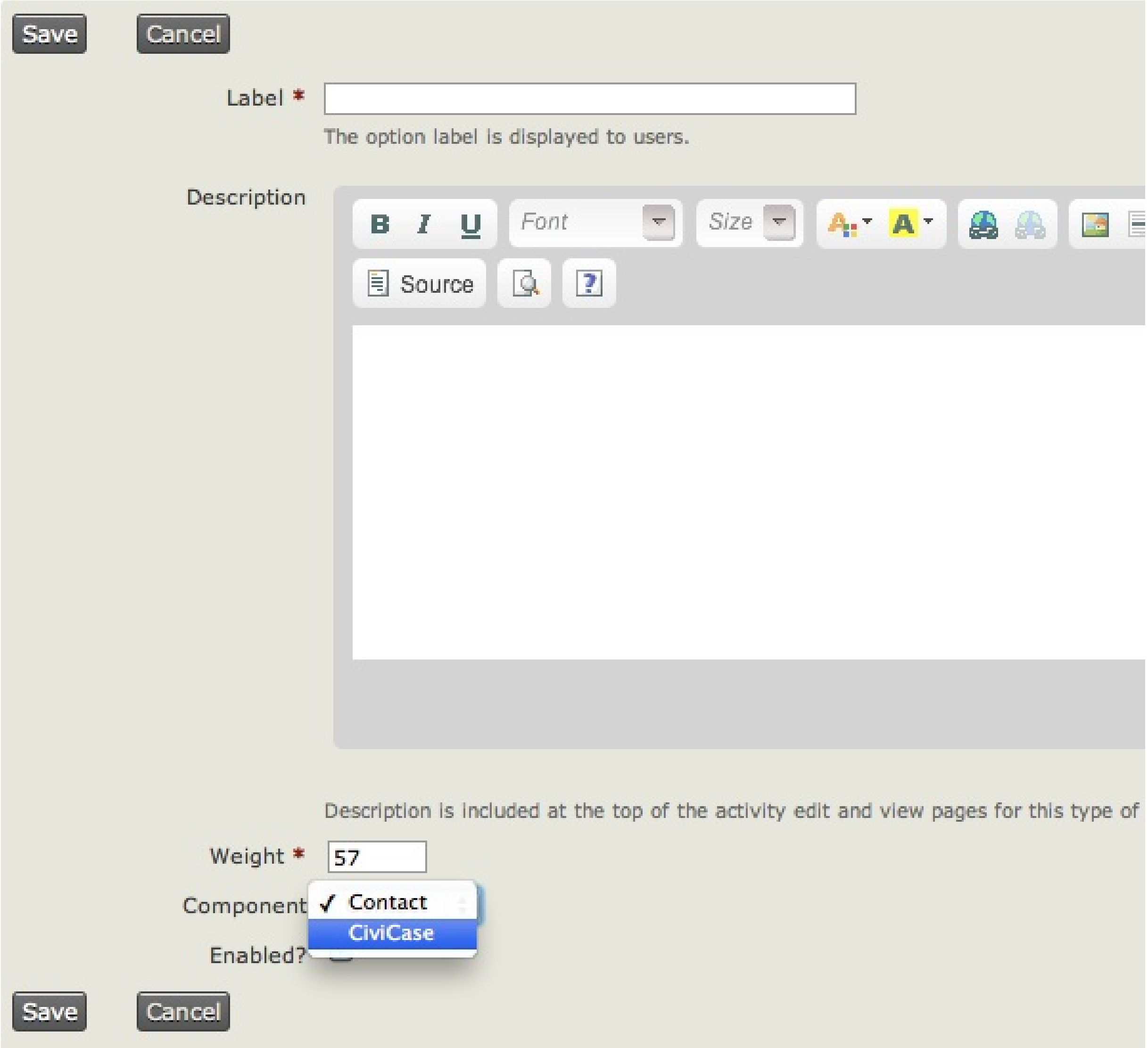
- **time**: activities always happen at a certain point in time
- **duration**: so you can collect all the time spent on a series of activities
- **status**: is the activity scheduled, completed, cancelled, etc.
- **added by**: the person who added this activity, or the contact if they carried out the 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.

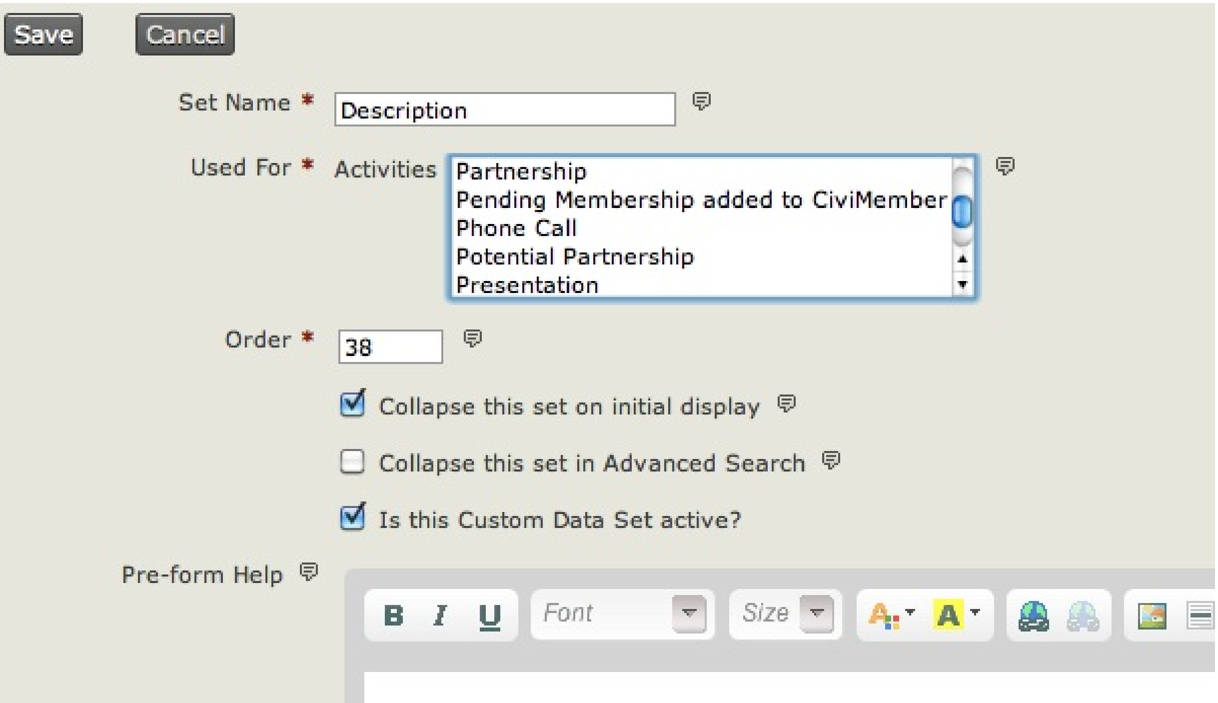
Creating new Activity Types

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.



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.



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.

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

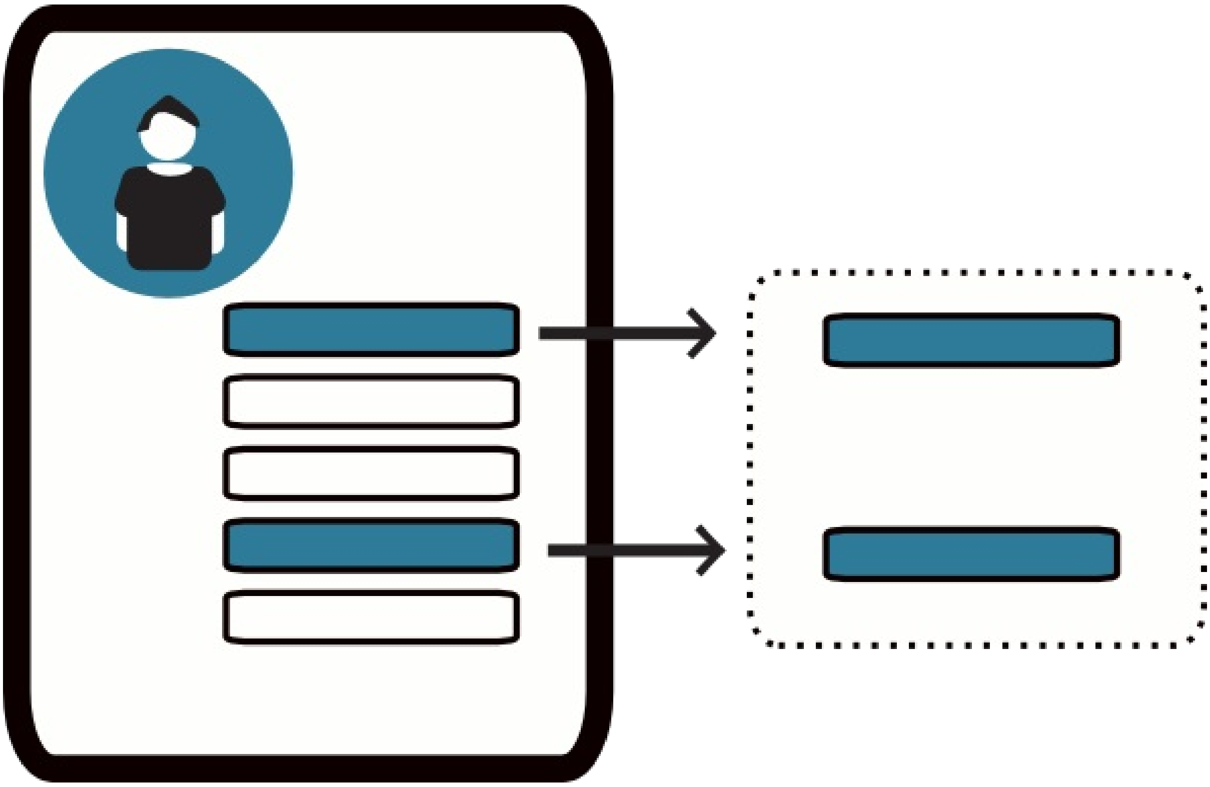
If an existing relationship type is no longer useful or relevant for your organisation you can either disable or delete it so it is no longer presented as an option for new relationships. Disabling rather than deleting the relationship type has two significant advantages: you will still be able to see 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.

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).

To build a 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:

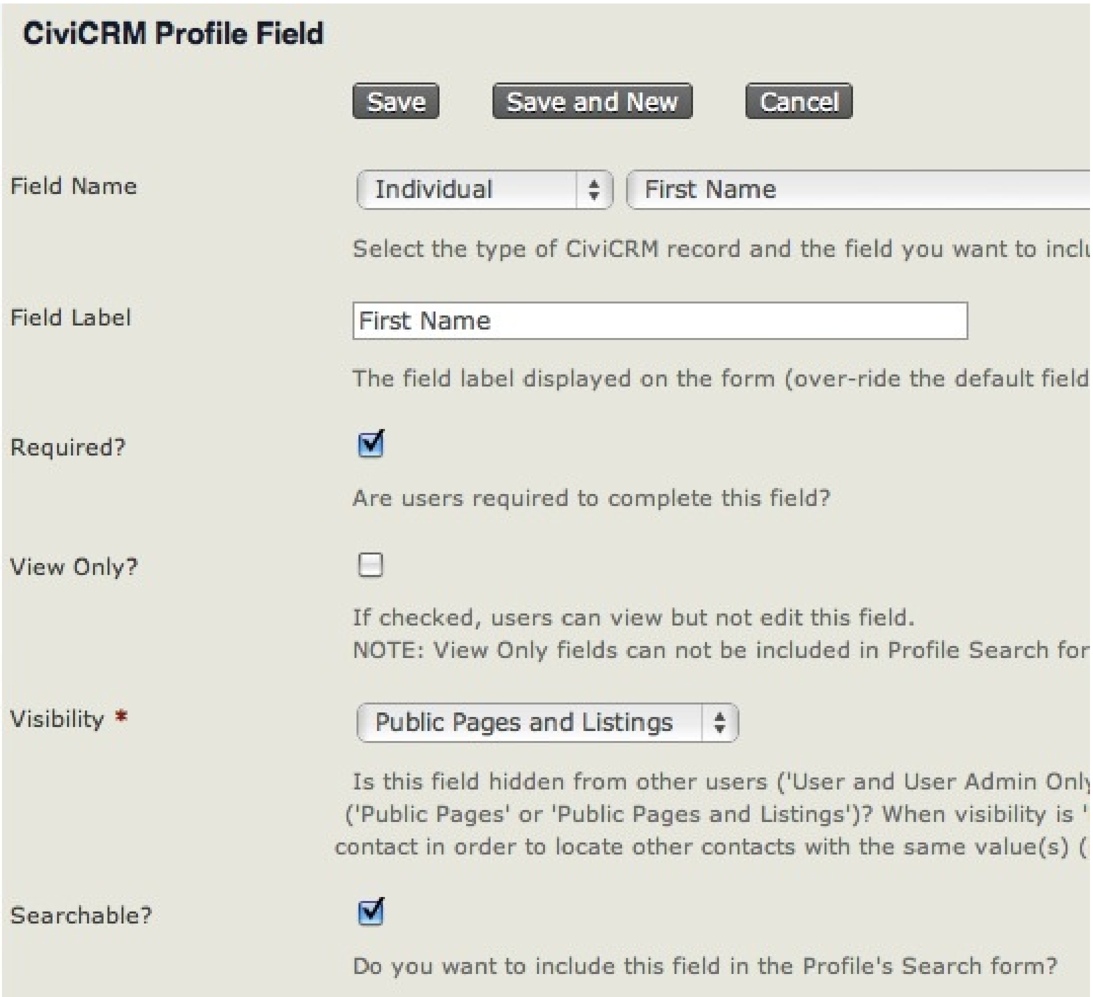
3. The next two text fields allow you to include help text to assist the person filling out the form.

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.



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 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

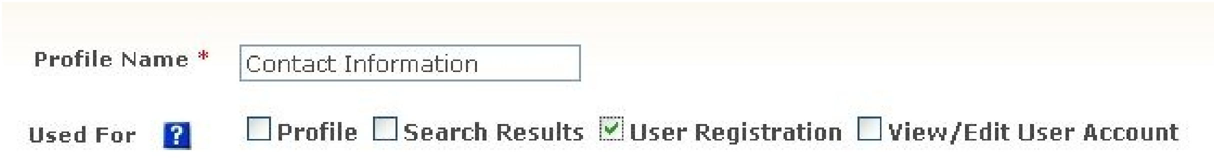
Often you will want to define certain fields for inclusion in event registration and contribution pages. This process is similar to the volunteer sign-up example above. The only significant difference is that you can include fields in your profile that are specific to participant records (for event registration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



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

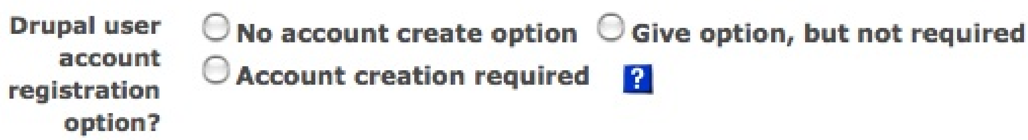
You can embed one or more CiviCRM profiles directly into Drupal's My Account screen. This makes it easy for logged-in users to review and update their information whenever they visit their My Account page.

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.



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

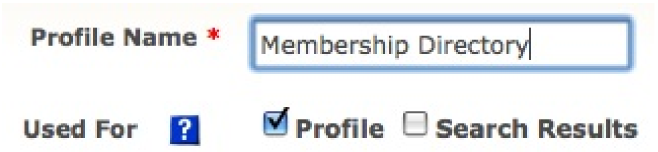
Profiles and directories

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:



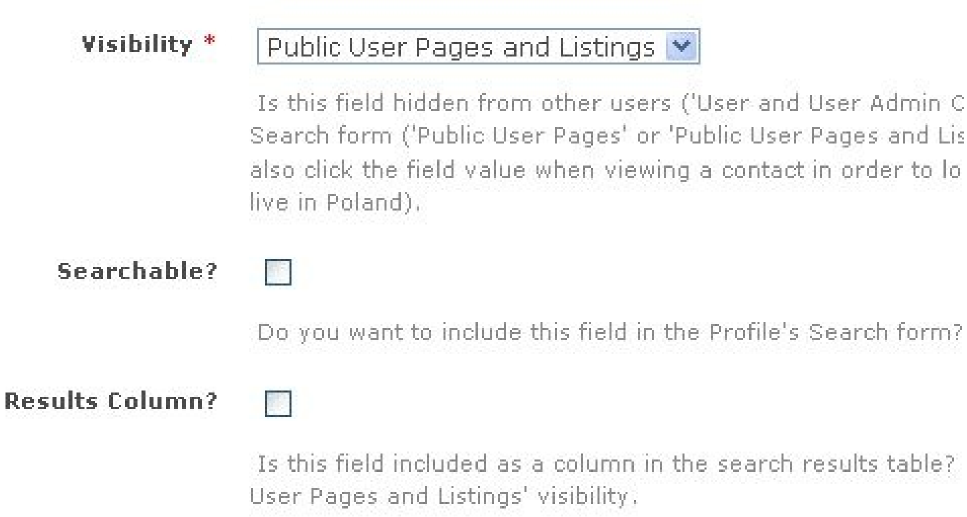
4. Advanced Settings: there are a few options under advanced settings that are helpful when using profiles for directories.
    1. **Enable mapping**: a really cool feature available in CiviCRM is to allow visitors to map contacts in your directory using Google or Yahoo! maps. They can then obtain directions 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.

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

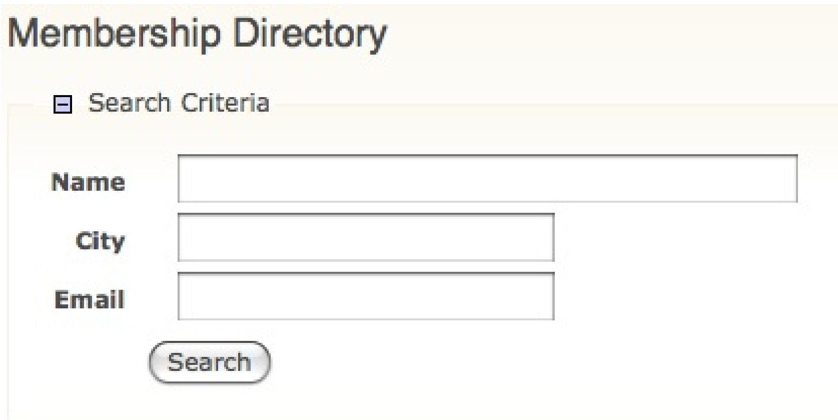
- appear in the record detail View page.

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

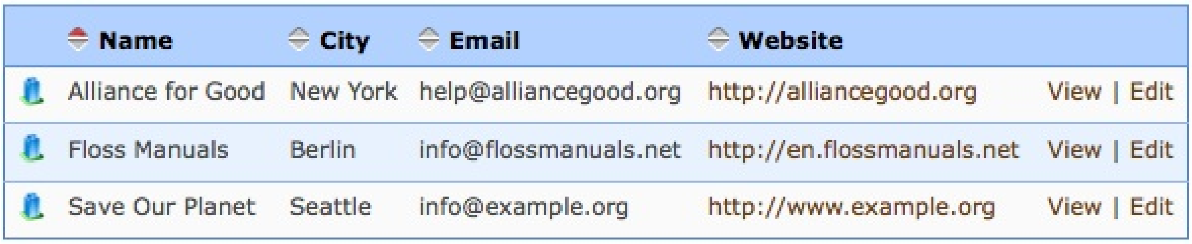


- Visibility for all fields in your directory must be set to **Public Pages** or **Public Pages and Listings**. The difference between these two options is that those configured as Public Pages and Listings will have the field in detail view hot-linked, enabling the user to generate a follow-up search 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.



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.

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:

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

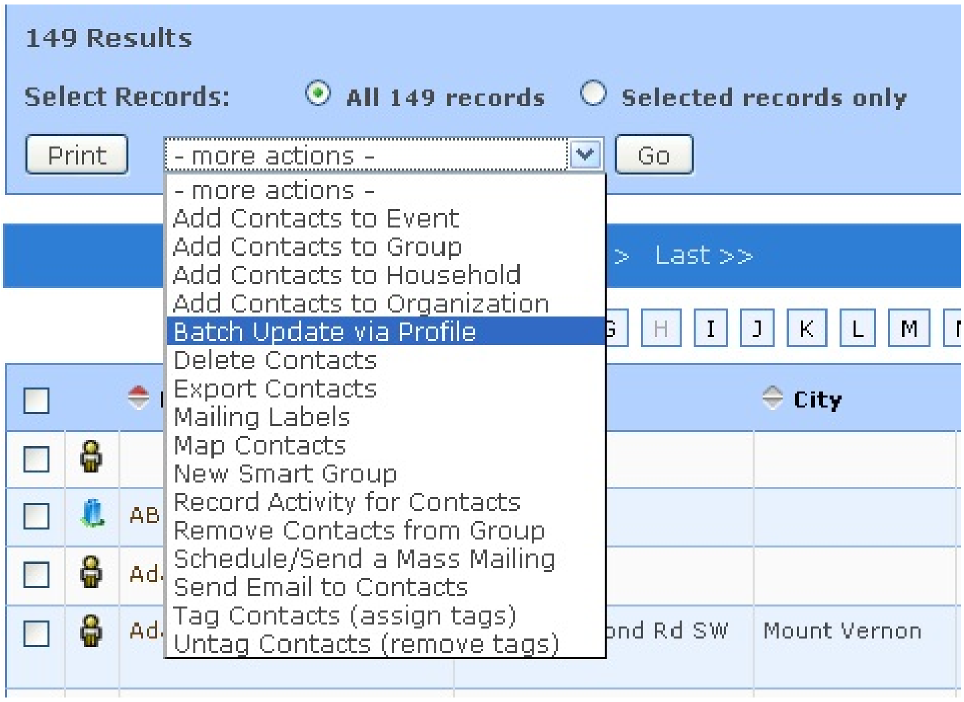
The final way that profiles can be used is to perform batch updates of data. For example, you have a custom field called "volunteer interests" and you want to update the volunteers group with a certain interest. You can easily update the entire group using a profile.

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

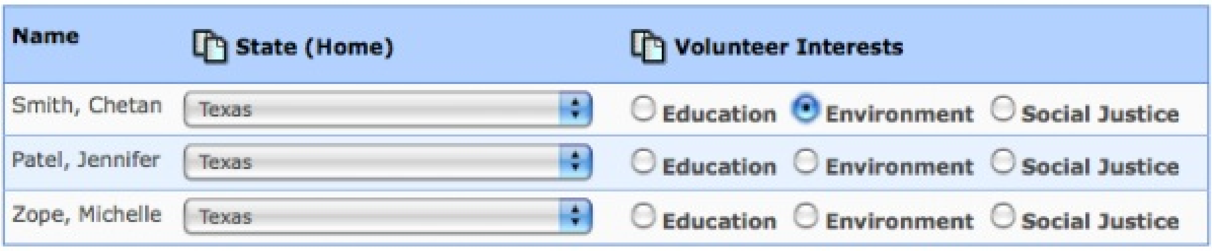
   No other profile settings are relevant for this type of usage.

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.



You will see a grid with the fields in your profile. You can update each field and row individually. If there is a field where you want to enter the same value for ALL records, you can enter that value in the first row and then click on the "copy values" icon to the left of the column header. This will copy the field value to all the rows in your grid.



Don't forget to click the Update Contacts button at the bottom of the page to save your changes.

Batch update limitations

- You cannot perform batch updates for different types of contacts (individuals and organisations, for example) at the same time.
- If you wish to update participant fields, you must do the update from a Find Participants search (and only include participant fields in your profile).
- You may only perform a batch update for 100 records at a time.

Combining record types in a profile

A profile usually contains fields of one record type. For example: First Name and Last Name (Individual fields). But in some cases, such as online event registration and online contribution pages, you can combine fields from two different record types (e.g. Individual + Participant fields or Individual + Contribution fields). You can also combine Individual fields with general Contact fields (e.g. Last Name + Email Address).

If you try to combine fields with an unsupported combination of record types, you'll get an error when you try to save the field.

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.

CiviPledge

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 a 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 demos 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) andPerl/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 **constinutent** 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

"RÃ©pondez s'il vous plaÃ®t", 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 (æ—¥æœ¬) and Korea (ëŒ€í•œë¯¼êµ)".

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 URI. 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 asApache 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 an 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**.