## Fundamentals Track

This course teaches the basics of using PowerBase for organizing by following a realistic organizing work flow: recruiting members for a membership meeting.

Starting with entering canvassing results, through organizing contacts into groups, sending mass email and registering and doing turn out for the membership meeting itself, this course will aquaint you with all the fundamental steps of using PowerBase.

Enclosed please find the course outline and materials that will be used for the Fundamentals track. You may either follow along on screen, or if you prefer, you may print this out prior to coming to the training.

## Course Outline

1. Entering Canvassing Results: the basics of logging in and doing simple data entry of contacts from a canvassing results page.
2. Powerbase and Campaign Components: review of the steps taken in a typical organizing campaign and how they align with the components in the PowerBase database
3. Advanced Searching: using PowerBase's various search interfaces to find the data you need in your database
4. Organizing your base in to groups: Using smart groups to organize your base based on various criteria, including which organizer they are assigned to, geography, interest, etc.
5. Events: introduction to creating events and using them to track attendance
6. Contribution Pages: introduction to creating public facing pages for people to make donations
7. Political education: the role of technology in society and for social change
8. Communicating with your base: basics of email and other forms of communications
9. Reports: Get a quick birds-eye view of who your yes's are and who needs more contact.

# Walk List: Winston Salem

| | *Name* | *Address* | *Phone* | *Email* | *Notes* |
|---|---|---|---|---|---|
| 1. | Elois Birkholz | 2400 Wallingford Rd, Winston Salem, NC 27101 | 123-555-1234 | elois.birkholz@example.net | |
| 2. | Gail Mcafee | 2410 Wallingford Rd, Winston Salem, NC 27101 | 123-555-3232 | gail.mcafee@example.net | |
| 3. | Janice Pearsall | 2410 Wallingford Rd, Winston Salem, NC 27101 | 123-555-9322 | janice.pearsall@example.net | |
| 4. | Cecilia Penning | 2420 Wallingford Rd, Winston Salem, NC 27101 | 123-555-2342 | cecilia.penning@example.net | Sisiter of Emelia |
| 5. | Teodora Kinley | 2430 Wallingford Rd, Winston Salem, NC 27101 | 123-555-2323 | teodora.kinley@example.net | |
| 6. | Emelia Edelson | 2440 Wallingford Rd, Winston Salem, NC 27101 | 123-555-3433 | emelia.edelson@example.net | |
| 7. | Marge Light | 2450 Wallingford Rd, Winston Salem, NC 27101 | 123-555-3221 | marge.light@example.net | Works nights, Call days |
| 8. | Mitchel Bunnell | 2460 Wallingford Rd, Winston Salem, NC 27101 | 123-555-2342 | mitchel.bunnell@example.net | |
| 9. | Akiko Ehrhardt | 2470 Wallingford Rd, Winston Salemg, NC 27101 | 123-555-2531 | akiko.ehrhardt@example.net | |
| 10. | Lavinia Calvin | 2480 Wallingford Rd, Winston Salem, NC 27101 | 123-555-1345 | lavinia.calvin@example.net | |
| 11. | Faye Grana | 2490 Wallingford Rd, Winston Salem, NC 27101 | 123-555-2003 | faye.grana@example.net | Lavinia's mother |
| 12. | Sanjuana Little | 2500 Wallingford Rd, Winston Salem, NC 27101 | 123-555-2045 | sanjuana.little@example.net | |
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| 14. | Maryrose Barak | 2520 Wallingford Rd, Winston Salem, NC 27101 | 123-555-2256 | maryrose.barak@example.net | |
| 15. | Norbert Matarazzo | 2530 Wallingford Rd, Winston Salem, NC 27101 | 123-555-2453 | norert.matar@example.net | |
| 16. | Glenda Bhatti | 2535 Wallingford Rd, Winston Salem, NC 27101 | 123-555-2754 | glenda.bhatti@example.net | Potential leader! |
| 17. | Rex Grossi | 2550 Wallingford Rd, Winston Salem, NC 27101 | 123-555-1104 | rex.grossi@example.net | |
| 18. | Yun Ritts | 2590 Wallingford Rd, Winston Salem, NC 27101 | 123-555-1454 | yun.ritts@example.net | Journalist |
| 19. | Sheldon Baldon | 2570 Wallingford Rd, Winston Salem, NC 27101 | 123-555-1604 | sheldon.baldon@example.net | |
| 20. | Micah Pasley | 2480Wallingford Rd, Winston Salem, NC 27101 | 123-555-1754 | micah.pasley@example.net | |
| 21. | Jose Anderson | 2448 Kingsgate Dr, Winston Salem, NC 445132 | 123-555-1220 | jose.anderson@example.net | |
| 22. | Stephen White | 2460 Kingsgate Dr, Winston Salem, NC 27101 | 123-555-1532 | stephen.white@example.net | Does not want email |

# Walk List: Winston Salem

| | Name | Address | Phone | Email | Notes |
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| 23. | Christina Richardson | 2470 Kingsgate Dr, Winston Salem, NC 27101 | 123-555-2130 | c.richardson@example.net | |
| 24. | Kathy Murphy | 480 Kingsgate Dr, Winston Salem, NC 27101 | 123-555-2321 | k.murphy@example.net | |
| 25. | Clarence Hall | 2490 Kingsgate Dr, Winston Salem, NC 27101 | 123-555-1200 | c.hall@example.net | Works for city |
| 26. | Jennifer Bell | 2500 Kingsgate Dr, Winston Salem, NC 27101 | 123-555-3434 | j.bell@example.net | |
| 27. | Joseph Patterson | 2510 Kingsgate Dr,Winston Salem, NC 27101 | 123-555-2134 | j.patterson@example.net | |
| 28. | Evelyn Carter | 2520 Kingsgate Dr, Winston Salem, NC 27101 | 123-555-1441 | e.carter@example.net | Theresa's mother |
| 29. | Theresa Cooper | 2345 Kingsgate Dr, Winston Salem, NC 27101 | 123-555-2324 | t.cooper@example.net | |
| 30. | Rose Kelly | 2349 Kingsgate Dr,Winston Salem, NC 27101 | 123-555-2134 | r.kelly@example.net | |
| 31. | Carolyn Gray | 2356 Kingsgate Dr, Winston Salem, NC 27101 | 123-555-2356 | c.gray@example.net | No email |
| 32. | Michelle Reed | 2700 Kingsgate Dr, Winston Salem, NC 27101 | 123-555-2794 | m.reed@example.net | |
| 33. | Cynthia Hughes | 2790 Kingsgate Dr, Winston Salem, NC 27101 | 123-555-2342 | c.hughes@example.net | |
| 34. | Justin Williams | 2795 Kingsgate Dr, Winston Salem, NC 27101 | 123-555-2450 | j.williams@example.net | Bruce's brother |
| 35. | Martha James | 2513 Dilworth St, Winston Salem, NC 27101 | 123-555-1294 | m.james@example.net | |
| 36. | Rachel Wright | 2345 Dilworth St, Winston Salem, NC 27101 | 123-555-1458 | r.wright@example.net | |
| 37. | Bruce Wilson | 2456 Dilworth St, Winston Salem, NC 27101 | 123-555-0987 | b.wilson@example.net | |
| 38. | Elizabeth Walker | 4566 Dilworth St, Winston Salem, NC 27101 | 123-555-2344 | e.walker@example.net | Knows all the neighbors |
| 39. | David Nelson | 4579 Dilworth St, Winston Salem, NC 27101 | 123-555-5552 | d.nelson@example.net | |
| 40. | Keith Young | 4601 Dilworth St., Winston Salem, NC 27101 | 123-555-4659 | k.young@example.net | |

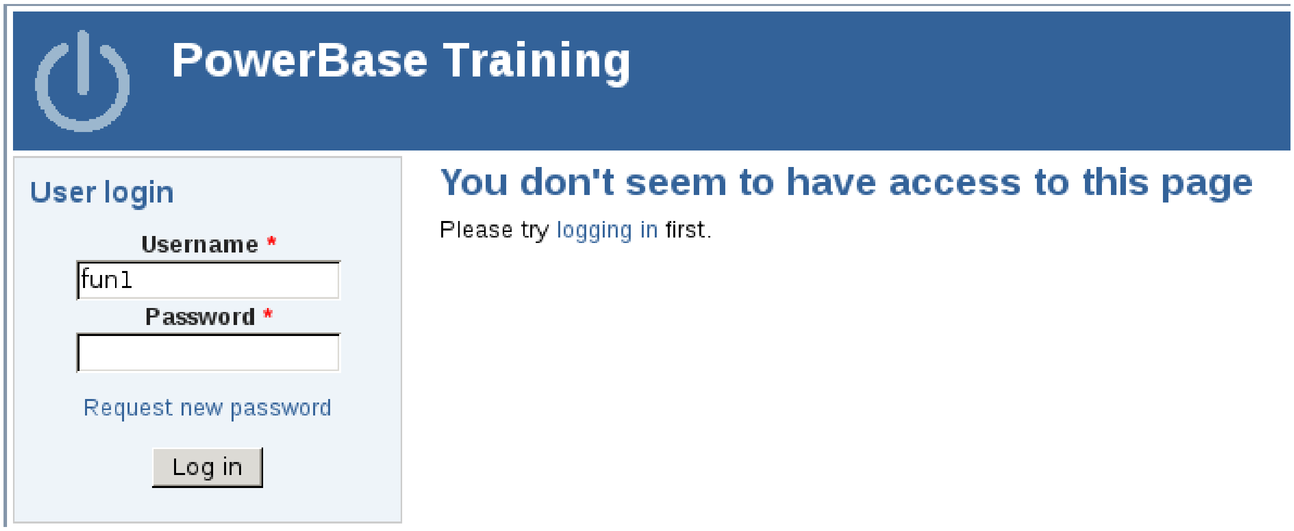
# Login and Change Password

This tip sheet covers your first login to your database.

You should be provided with a user name and password by your PowerBase administrator.

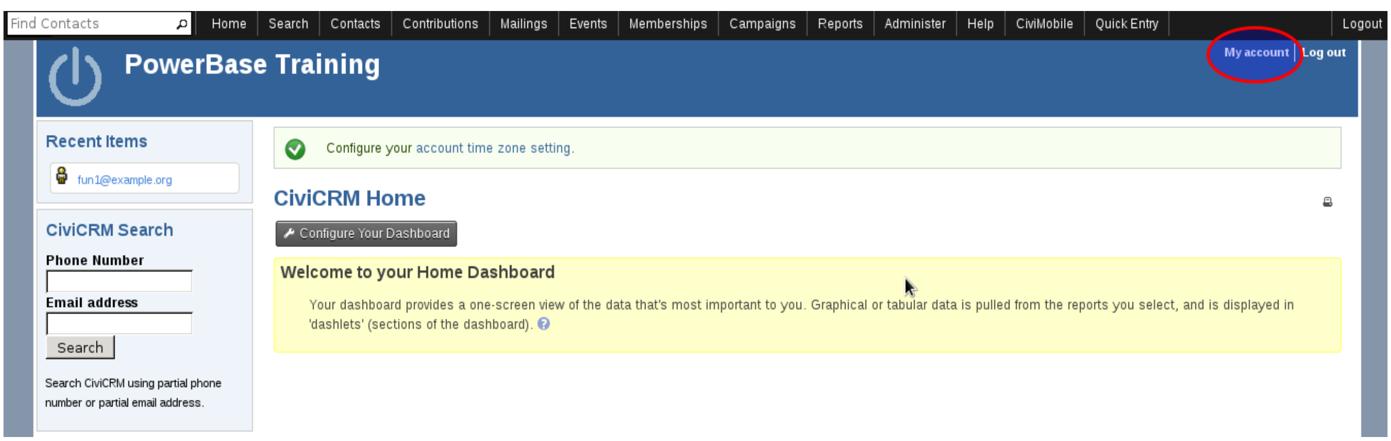
*Tip: Be sure never to share a login with another person. Sharing logins makes it harder to secure your database if a password is forgotten or compromised.*

Your database web address will contain a variation on your group's name plus .ourpowerbase.net. For example, https://ptp.ourpowerbase.net/. Or, for trainings, https://training1.ourpowerbase.net/.



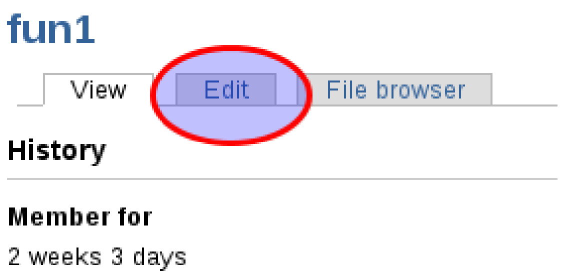

Enter your username and password in the form at the top left.

After successfully logging in, you should see a page like the one below. Click the “My Account” link to change your password.

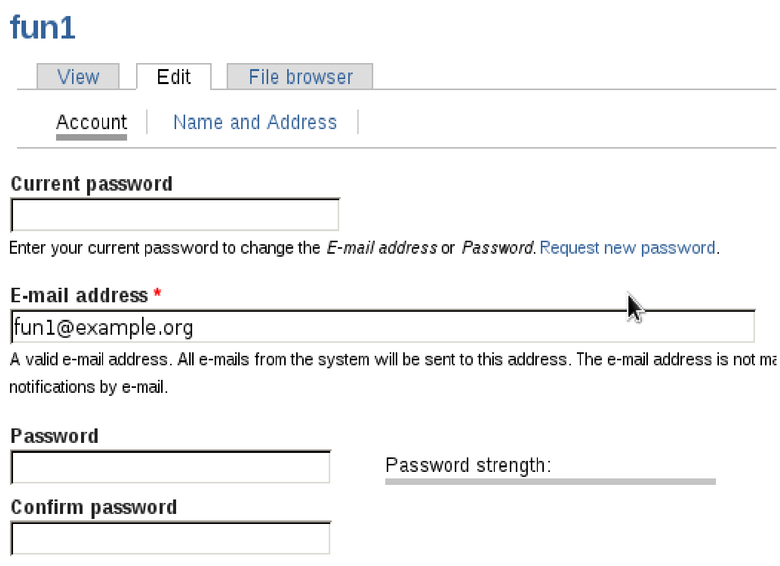


# Login and Change Password

Next, click the Edit link...




..and fill in both your current password and your new password (twice).




When you are done, scroll to the botton and click the save button.

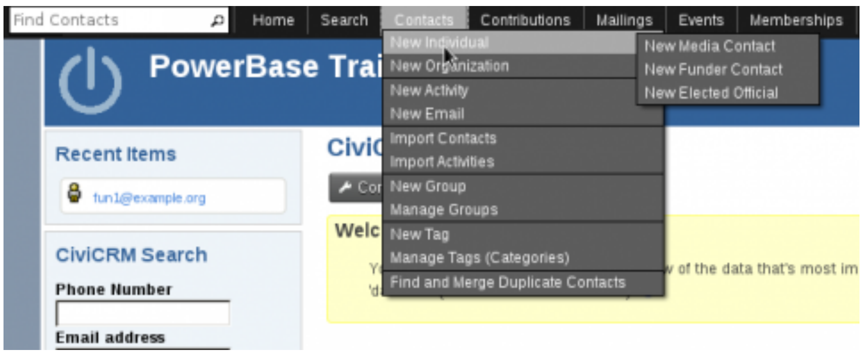
# Create An Individual Contact

View (/node/1088) Edit (/node/1088/edit) Track (/node/1088/track)

Convert (/node/1088/convert)

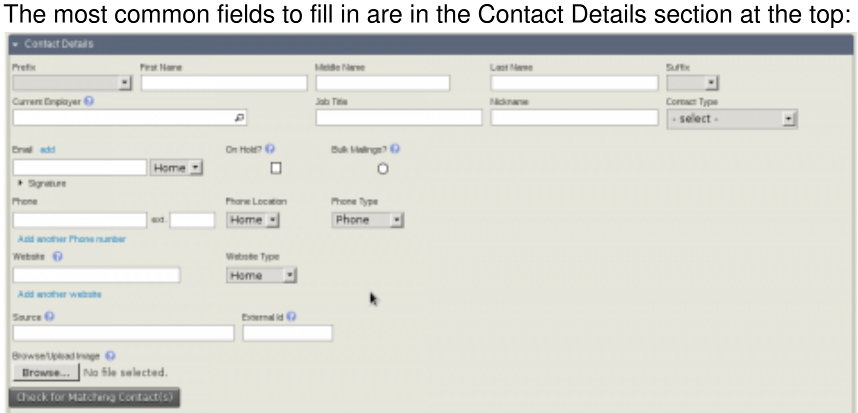
*Submitted by Henry (/users/henry) on December 16, 2015 - 4:32pm*
Creating an individual Contact

Creating a contact is one of the first steps in learning how to use PowerBase. Begin by clicking the Contact menu and selecting New Individual.




You have the option of creating a Media, Funder or Elected official contact. However, if you simply click the New Individual link you will create a generic new individual, which is the most common type of individual contact you will be using.

The most common fields to fill in are in the Contact Details section at the top:

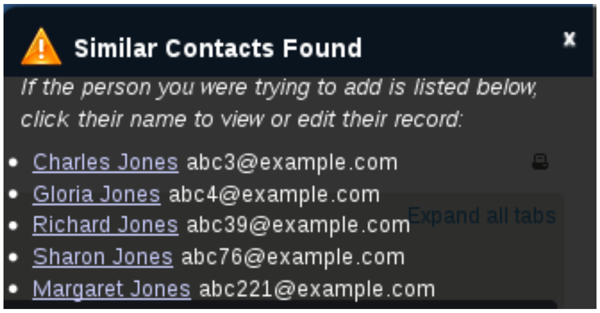


The “Check for Matching Contacts” button allows you to find any potential duplicates before adding a record.

In addition, while adding a name, PowerBase may automatically find a potential duplicate and show you a message like the following.

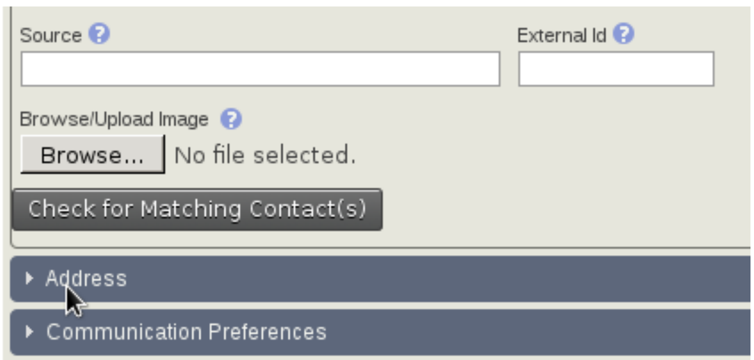
## Management

Administration (/admin)

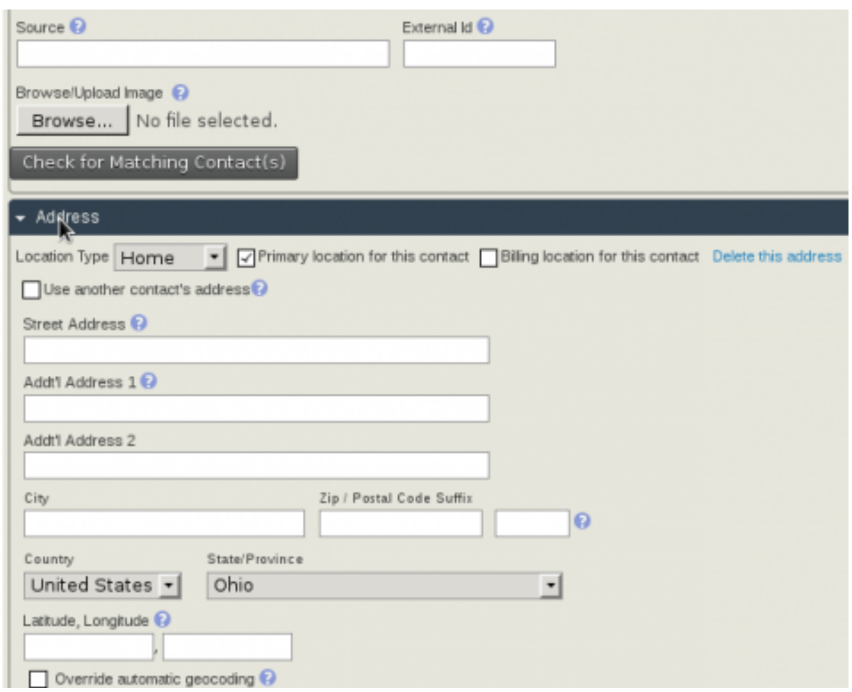



If the person you are entering is not a duplicate of any of those contacts, you can click the “x” in the top right corner of the message box to dismiss the message.

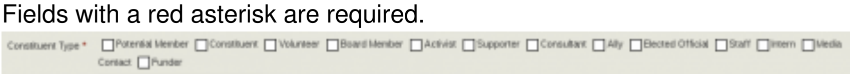
By clicking on one of the blue grey bars, you can expand that section to enter more details.




.......




Fields with a red asterisk are required.



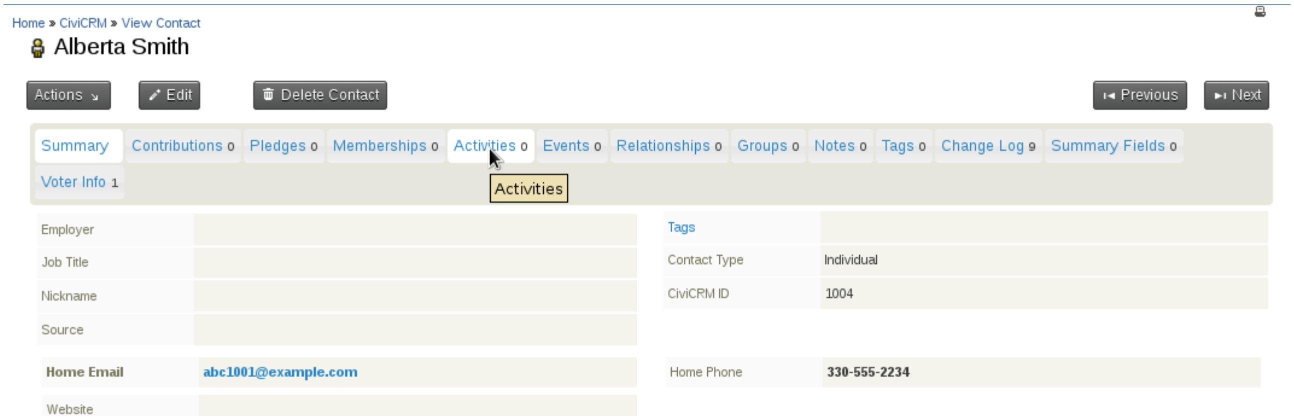
**Category:**
Collecting and Managing Contact Information

# Adding an activity to a contact

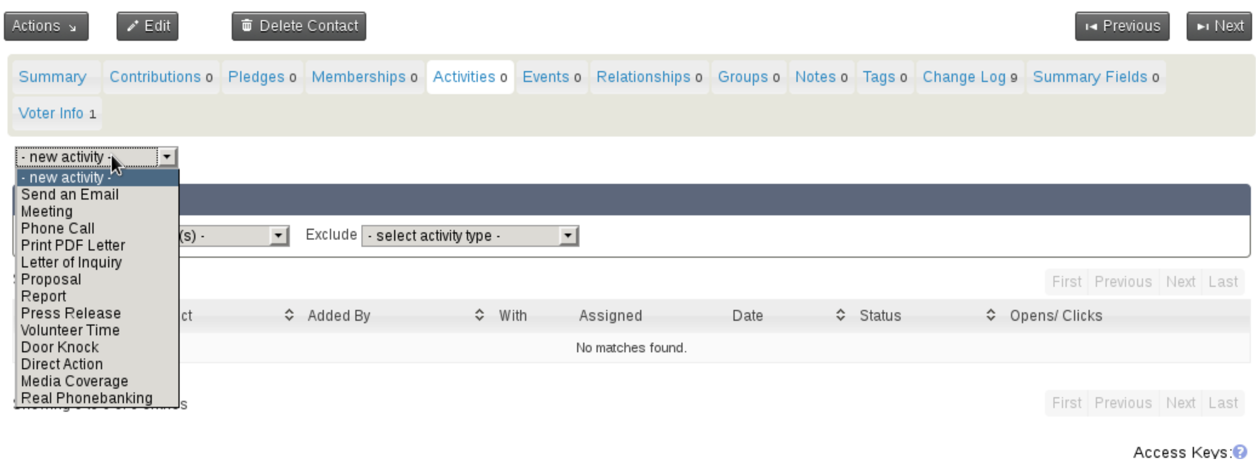
When a contact makes a contribution or attends an event or recieves an email (among other things), an activity record is automatically added the records this interaction.

Sometimes, however, we need to record other activities not automatically added, such as a phone call.

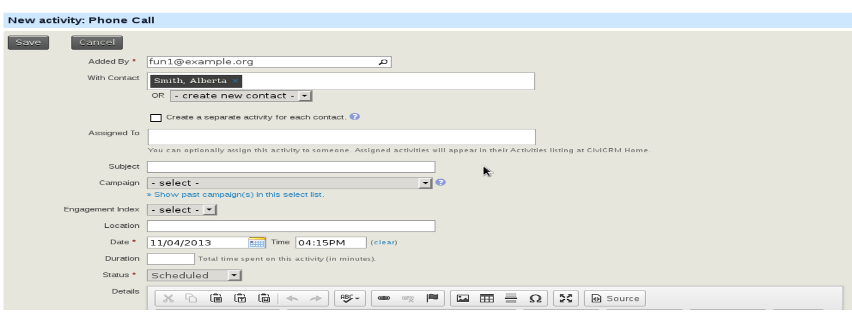
The first step is to find the contact you want to modify and then click the Activity tab.




Next, choose the activity type you want to add from the drop down list.




Lastly, fill out the details and click Save.

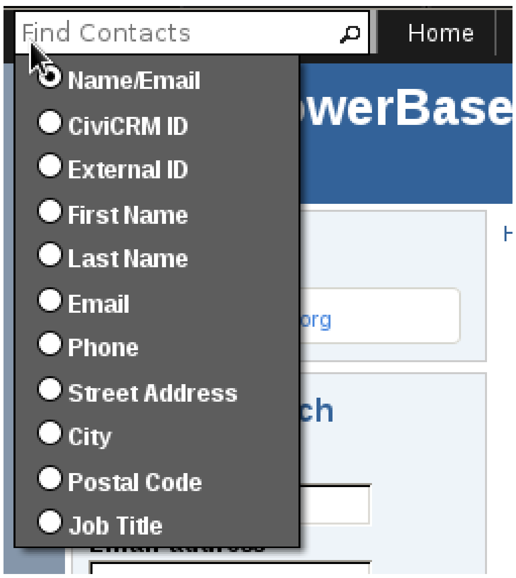


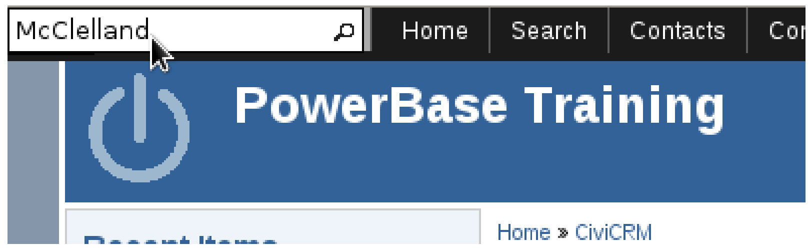
# Basic Searching

PowerBase offers many different ways to search from data, ranging from simple to complex. This handout covers the basic forms of searching.

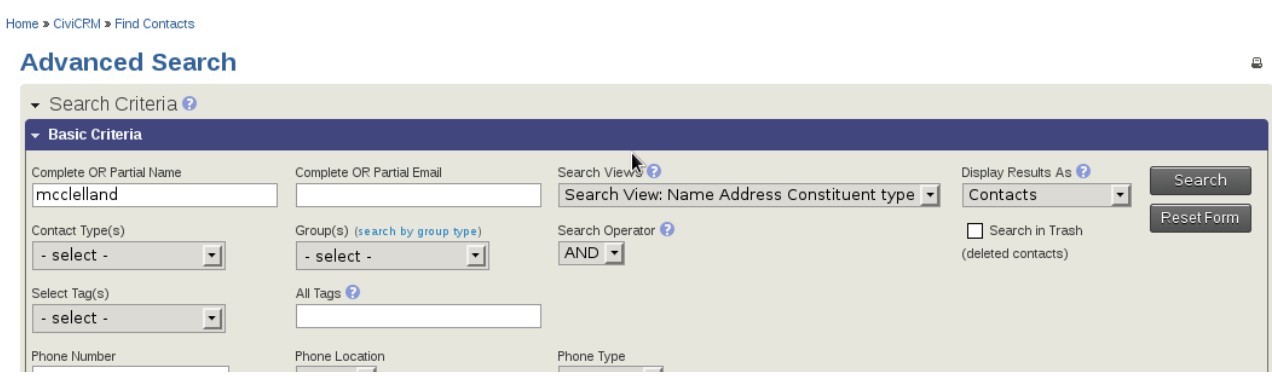
The easiest way to find a contact is using the quick search box in the top left. After clicking in this box, you will see a drop down allowing you to select which fields you want to search.

Name/Email is the default, and most common quick search. It searches any part of a name (first or last) and the email address. To select the default Name/Email, simply start typing the search term you would like to use.



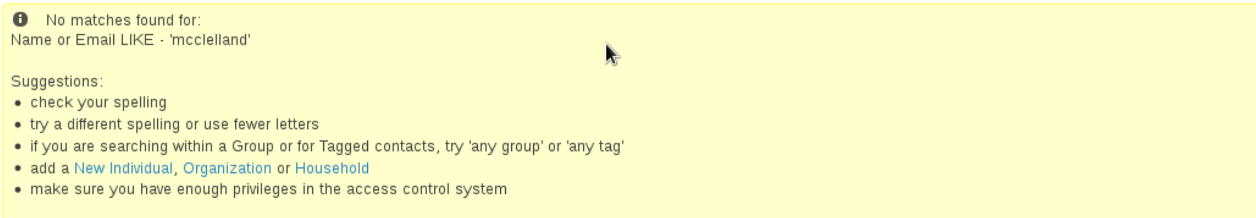




If no records are found, you will be sent to the advanced search screen (more on that below).

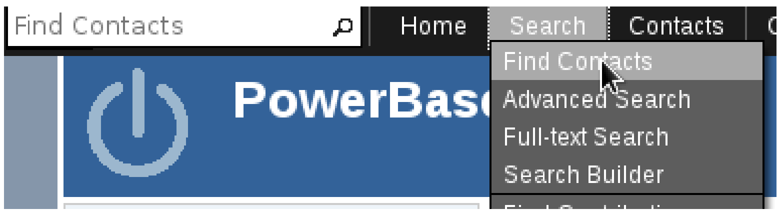


# Basic Searching

Which is quite confusing until you scroll down to see the message:

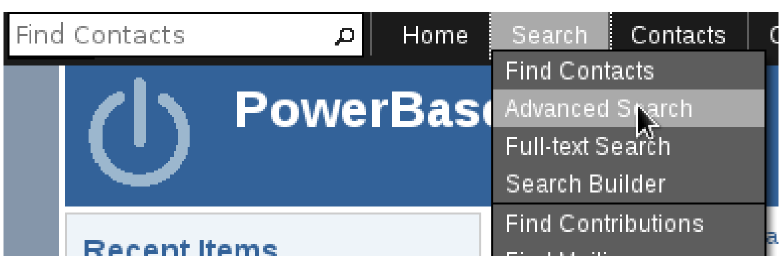



Sometimes you want to search for contacts based on the group they are a member of or a tag. In these cases, using the “Find Contact” search is your best bet.





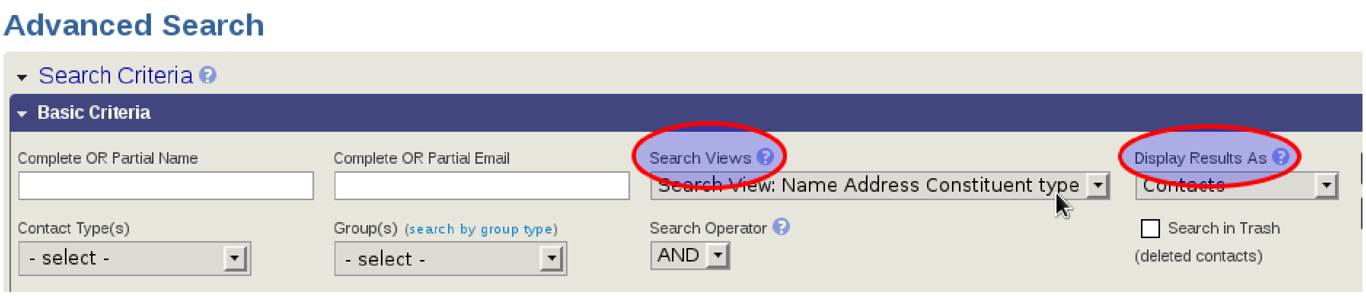
Lastly, you may want to search on a different field or a set of different fields. In this case, you will want to use the Advanced Search.



# Basic Searching

Advanced search has a number of fields and field groups. Like when adding a contact, click the triangle in a field group to expand or collapse it.

In addition, there are a few important fields in the advanced search form:

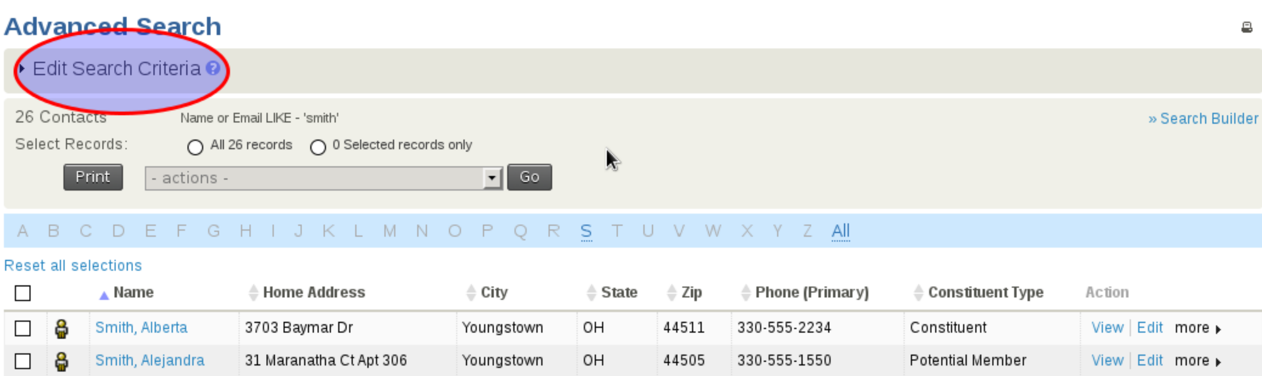



Search Views: When you execute a search, you can control which fields are displayed on the results page by selecting a different Search Views option.

Display results as: By default, you will get one record returned for each individual contact. However, sometimes you need more than one record per contact. For example, if you are searching for contributions, you may want to see all the contribution records, even if there are more than one contribution for a single contact. In these cases, choose a different value from the “Display Results As” field.

## Working with Results

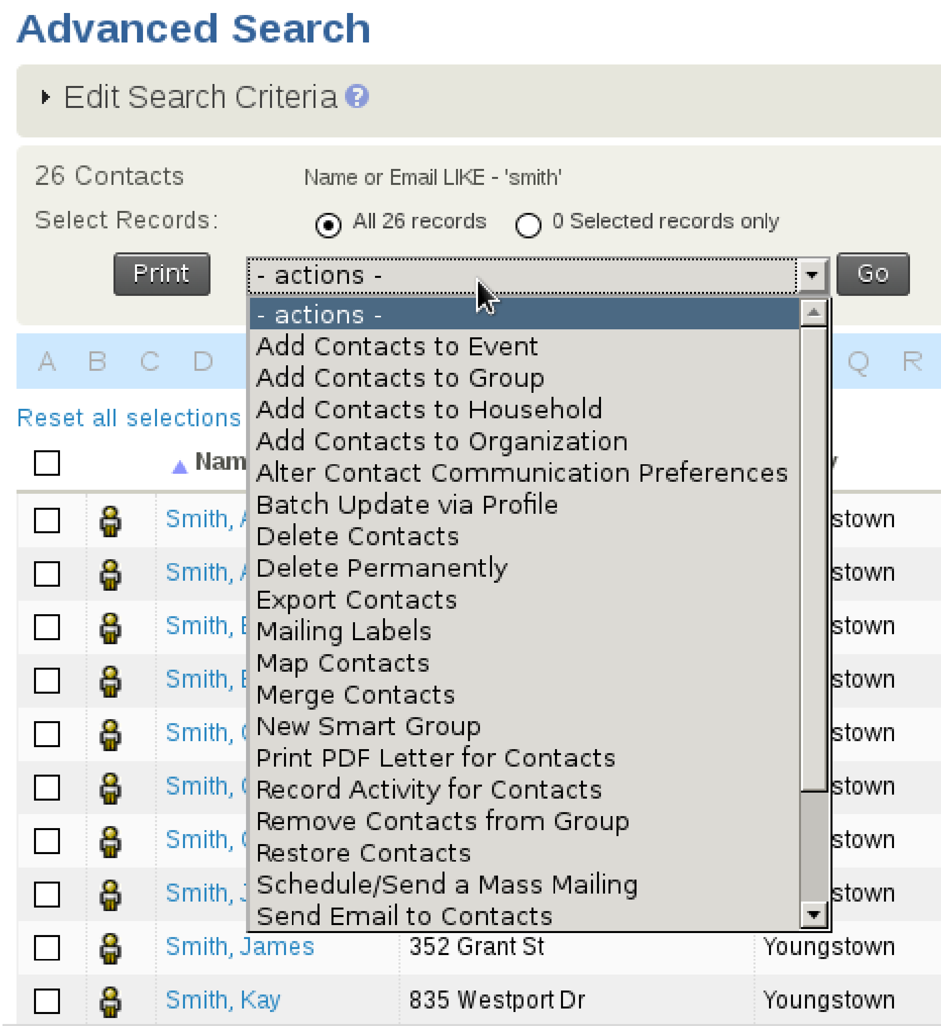
Regardless of the search method you use, your results page will look something like the following.




Your search criteria are always repeated for you. In this case, “Name or Email LIKE – 'smith'. In addition, by clicking the “Edit Search Criteria” title, you can review and repeat your search.

# Basic Searching

In addition, you will always have a list of actions that you can carry out on the selected records.



# Using Search to Find Contacts: Exercise



Report the number of contacts returned for each search.

1. Find all contacts on Wallingford Rd: _________
2. Find all contacts in zip code 27101: _________
3. Find all contacts with the first name James: ________
4. Find all contributions made this year for more than $100: ________
5. Find everyone who attended the Stop ICE event: _________

Extra Credit.

Log into your organization's database and run three searches that return useful information for your work. Be prepared to report on what the searches were and what the results were and why it is useful to you.

# 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 of contacts, activities, and cases, while 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 are just called **Groups**. You manually place contacts into and remove contacts from a (regular) group. For example, you can manually assign your organisation's board members to a Board of Directors 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 standard 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.

It is possible to create additional group types to reflect your specific needs. This is particularly useful if your organisation has hundreds of groups as group type can be used as a filter on the Manage Groups screen. To create additional group types go to **Administer>System Settings>Option Groups**and select 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.

The following outlines the pros and cons of groups vs. tags

**Benefits of tags**

- Easy to setup and use

- Easy to search by tags (can use either Basic or Advanced Search)
- Easy to combine with other properties (like residence state/province) to create Smart Groups

**Limitations of tags**

- You can not create Tags for use with specific types of contacts (i.e. you can't create tags that are ONLY for use with Individual contacts)
- When you export Tags, all Tags assigned to a record are exported in a single "cell" as a list (e.g. "Teacher, Volunteer")
- Tags allow multiple selections - so they may not be appropriate for mutually exclusive characteristics (e.g. "Democrat", "Republican", "Green Party")
- You cannot selectively hide or permission Tags on built-in or Profile create and edit forms (you get ALL Tags ALL THE TIME on edit forms)

**Benefits of Groups**

- Groups are the most flexible way of segmenting your contacts for a wide variety of purposes.
- Groups facilitate recurring tasks like sending an enewsletter, printing mailing labels, etc.
- Groups allow you to restrict access to "special" sets of contacts
- Groups support both administrative and end-user "subscribe" and "unsubscribe" actions - and a history of these actions is kept in the system
- Visibility settings allow you to decide which Groups are shown to end-users on Profile forms (i.e. some Groups can be "private")
- You can create Smart Groups that combine members of Group A + Group B

**Limitations of Groups**

- All existing Groups are listed under Manage Groups and in the search forms. This may cause group "overload" if your organization winds up with "too many" Groups.

- Groups used for short-term projects should be "purged" when they're no longer needed
- When exporting contact records, all the Groups a contact belongs to are exported as a single comma-separate list (e.g. "Administrators,Newsletter Subscribers")

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**.

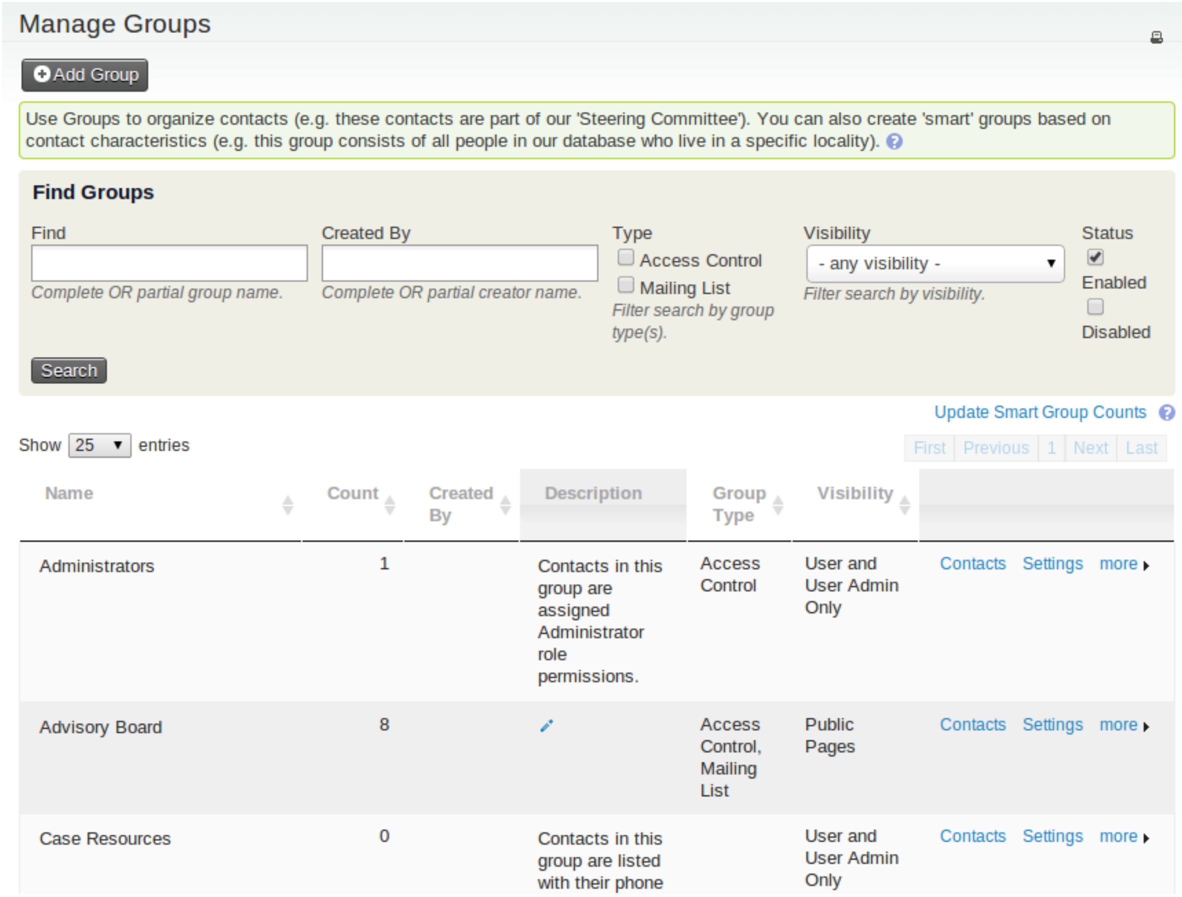
The first two methods also allow you to remove individual contacts from a group. The last two methods allow you to add multiple contacts to groups at once.

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.



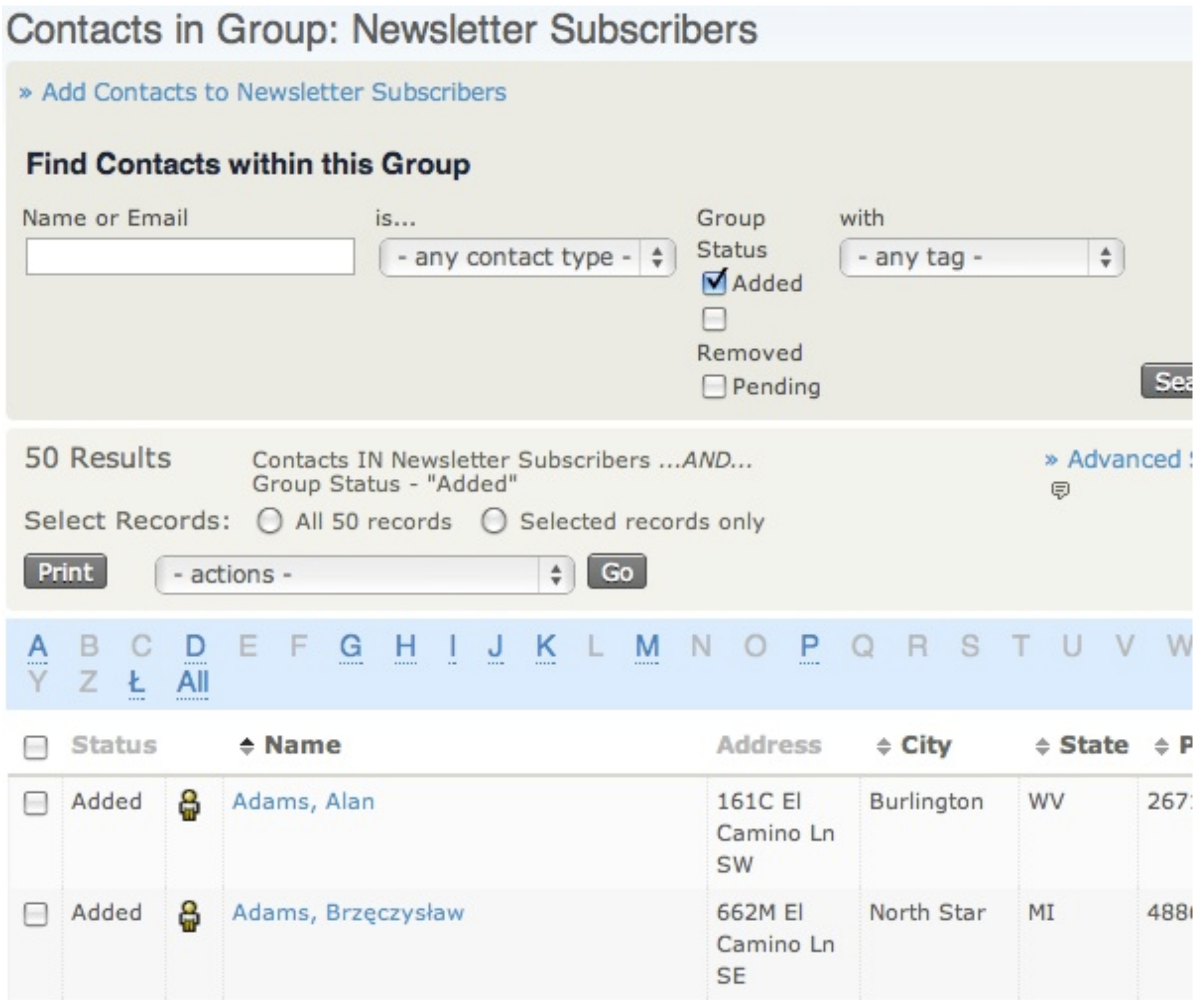

You can use the Find Groups form at the top of the Manage Groups screen to search for groups by name, type, visibility and whether the group is enabled or disabled. You can also scroll or browse through the list of groups further down the Manage Groups screen. This list includes both regular and smart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

# 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.




## Groups and ACL

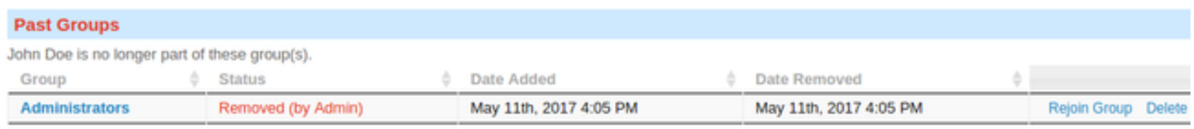
Access Control Lists (ACL) provide finer grained permissioning than what is available through Drupal's Permissions and Roles. Setting up ACLs requires a good understanding of the concept, which is thoroughly explained in the online CiviCRM documentation here: http://wiki.civicrm.org/confluence/display/CRMDOC/Access+Control [http://wiki.civicrm.org/confluence/display/CRMDOC/Access+Control%20]

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**
ACL support for Joomla was introduced in Joomla version 1.6.

## Removing versus deleting contacts from groups

One of the advantages to using groups over tags is that CiviCRM maintains a historical record of group membership. If you **Remove** a contact from a group, you can see when they were removed and by whom. This can be useful in a number of use cases (e.g. you can track former members of a volunteer group, or if an email subscriber asks why they are no longer receiving your newsletter, you can provide details on when they opted out).


Past Groups

John Doe is no longer part of these group(s).

| Group | Status | Date Added | Date Removed | |
|---|---|---|---|---|
| Administrators | Removed (by Admin) | May 11th, 2017 4:05 PM | May 11th, 2017 4:05 PM | Rejoin Group Delete |

If a contact was removed in error, there is an option to **Rejoin Group** and the contact will be added again. Every group record has a status attached to it: **Added**, **Removed**, or **Pending**. You can search for all of the members of a group by status. Navigate to **Contacts > Manage Groups**. Identify the group that you want to search within and select **Contacts** on the right-hand column. From there you can expand the search criteria and you are given an option to search by status. This could be useful, for example, if you want to generate a list of all of your former Advisory Board members.

# Creating an Event

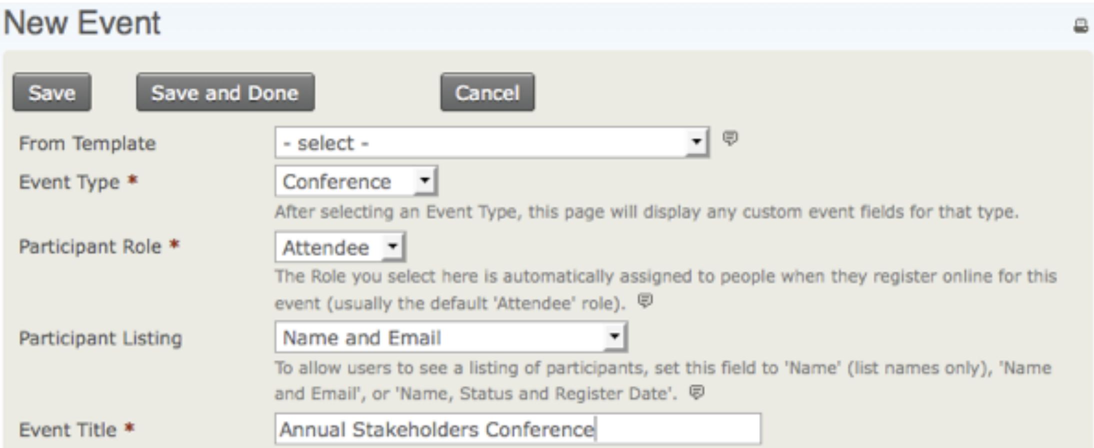
It's a good idea to go through each screen in detail as you learn about available options. Later in this chapter we'll explain how you can streamline the event creation process by creating event templates. These allow you to pre-fill most options.

Begin by navigating to **Events > New Event**.

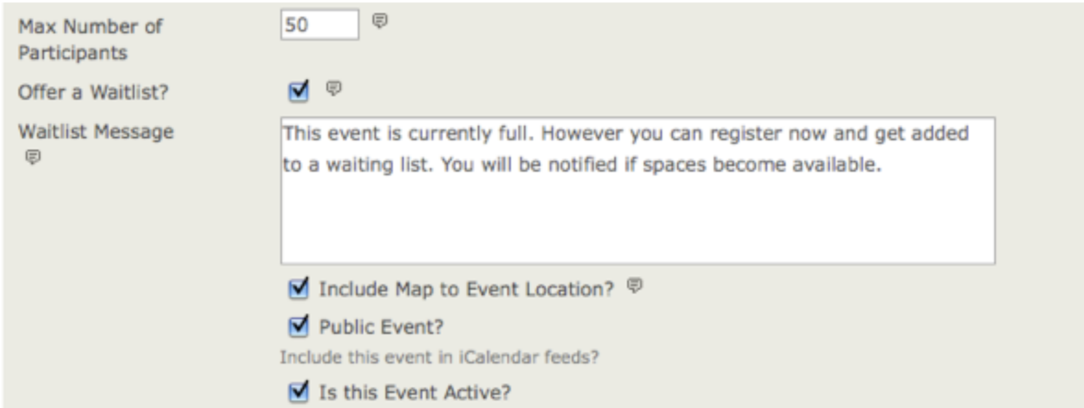
## Event Information and Settings

The first page in the event wizard requests basic information about the event:

- What type of event is it (e.g. conference, workshop, etc.)?
- What role will participants be assigned when they register online for this event? Roles distinguish different types of event participants, such as attendees, speakers and staff. The value placed in this field will be assigned by default when users register online. The most common value is Attendee.
- Do you want users to see a list of participants, and how much information about the participants do you want to reveal? Participant listings demonstrate support for an event and can help to generate interest within your constituent community. Note that the options you define in this section only*enable* participant listings — to display it, you will need to create a menu item or link to the listing somewhere on your web site. Once you've created the event, the participant listings link is displayed on the event configuration page. Refer to the chapter on Everyday Tasks for information on participant listings and other ways to promote your events.
- What is your event called? The title will appear on event information pages, registration pages, event listings, and in the Manage Events administrative page. Be sure to choose a meaningful, well-crafted title to represent your event.




- The next two fields (event summary and complete description) let you describe your event. Both the summary and complete description will be included on event information pages. Use the rich-text editor provided for the description field to include photo, images, and formatted text.
- Enter the start date/time and end date/time for your event. These will be included on the event information page and event listings.
- Set a maximum number of participants for each event and define a message to be displayed when that number is reached. This is important, because online registration otherwise lets people sign up without giving your staff a chance to intervene and shut off registrations.
- If you'd like to enable the Waitlist feature, you must first enable the related participant statuses. You can then check "Offer Waitlist" and set the message you want displayed on the event information page when the event is full.
- GPS and web-based mapping tools: CiviCRM integrates this functionality by letting you include Google Maps or Open Street Maps throughout your site. You will first need to configure your mapping solution through **Administer > System Settings > Mapping and Geocoding**. Then enable a map link which will generate the location based on the event location.
- Select the "Public Event" box to include the event in promotional listings such as RSS feeds, iCal files or feeds, and event listing pages. (Other techniques for promoting events are described in the Everyday Tasks chapter of this section).
- Lastly, you have the option of making this event active or inactive. If you anticipate that it will take some time to complete the configuration of your event, consider making it inactive it until it is complete to ensure it is not inadvertently listed on the event listing feeds. You can easily activate the event when you are ready to begin publicizing it.



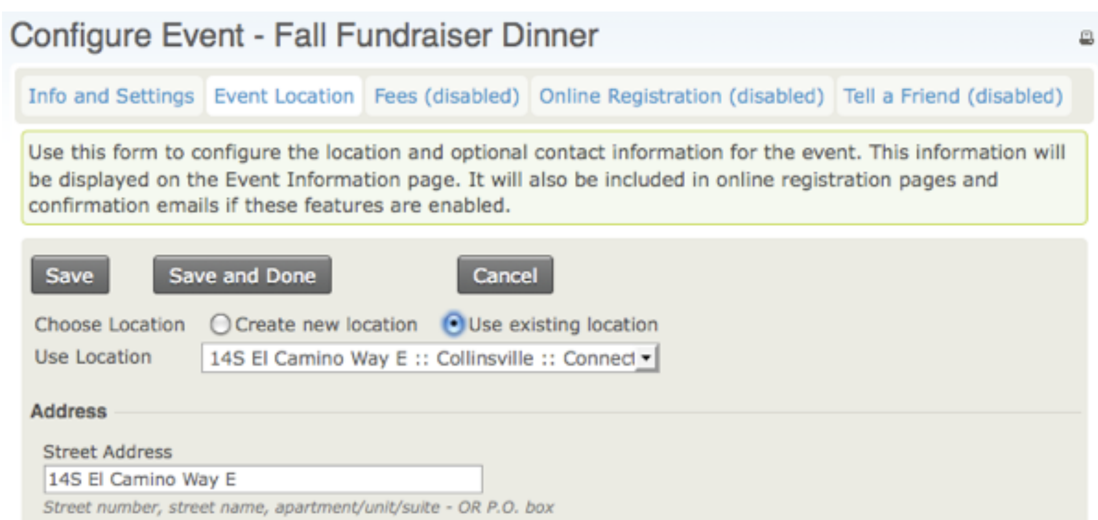

After reviewing the details on this page, click **Save** to advance to the next step. When you press Save, your event is created. You can interrupt configuration on any subsequent page by clicking Cancel and return later to review and modify any of the settings. Any information you entered on any page will be preserved so long as you press Save on that page.

To return to a saved event, navigate to **Events > Manage Events** and click **Configure** to continue working on the event.

## Event Location

The next step is to complete the location and contact details for the event. Though optional, it is highly recommended that you take the time to provide these details to your potential participants. If you have enabled a map link in the previous step, make sure that you fully complete the address details on this page (see screenshot).

Once you have entered an event location, you can reuse it for subsequent events by clicking **Use existing location** and selecting from the dropdown list.




You can also list phone numbers and email addresses on the event information page if you want to give registrants a way to contact event organizers directly. If the event is being held off-site from your organization's primary location, you may also want to provide contact information for the meeting location.

Click **Save** to save your entries and advance to the next step.

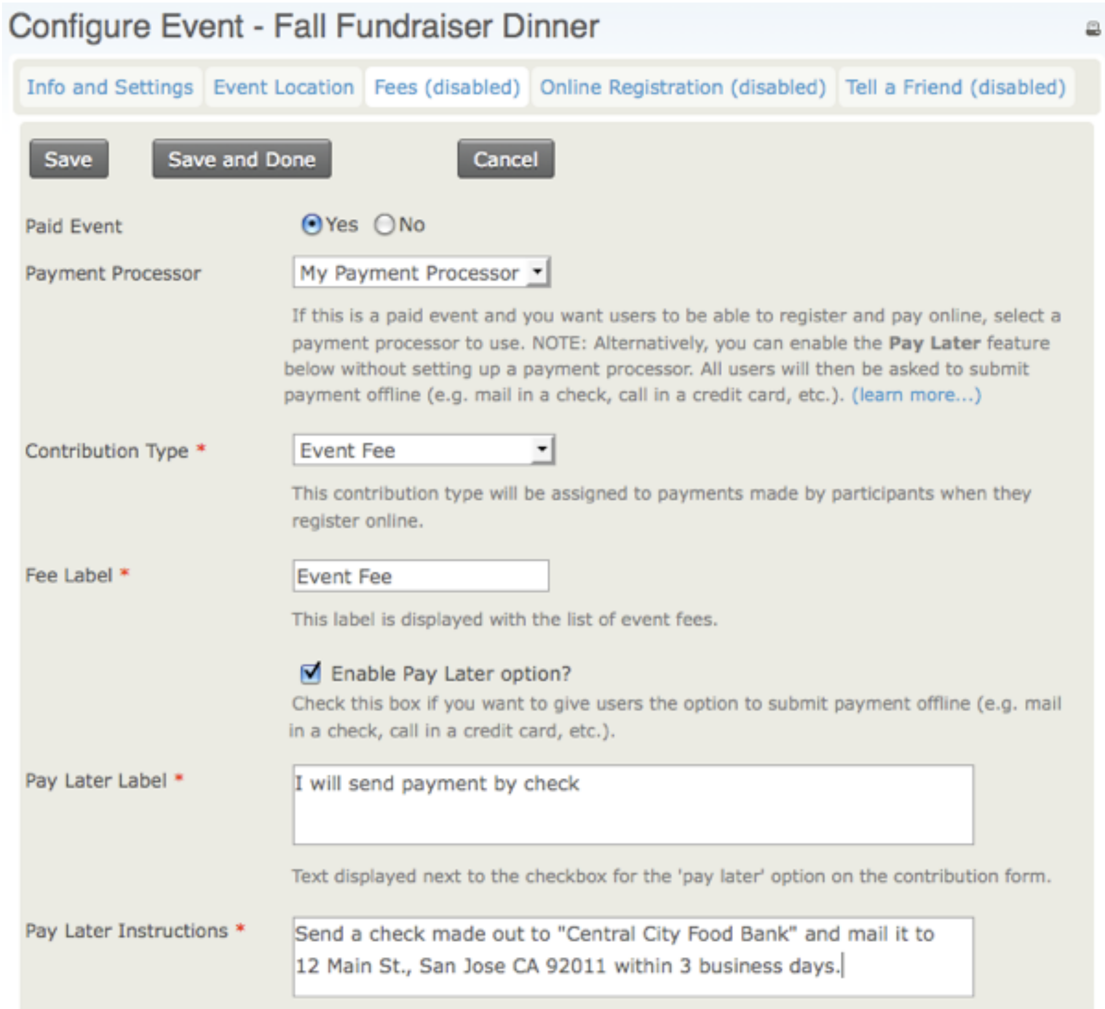
### Event Fees

If the event is free, set the **Paid Event** radio button to **No**, then click **Save** and skip to Online Registration.

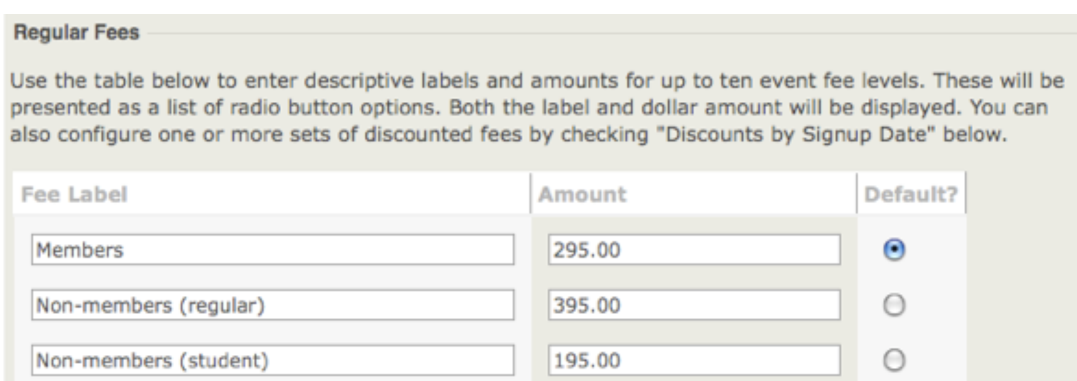
If this is a paid event, click **Yes**. The screen will show the options available (see the following set of screenshots).

Questions you are asked on this screen are:

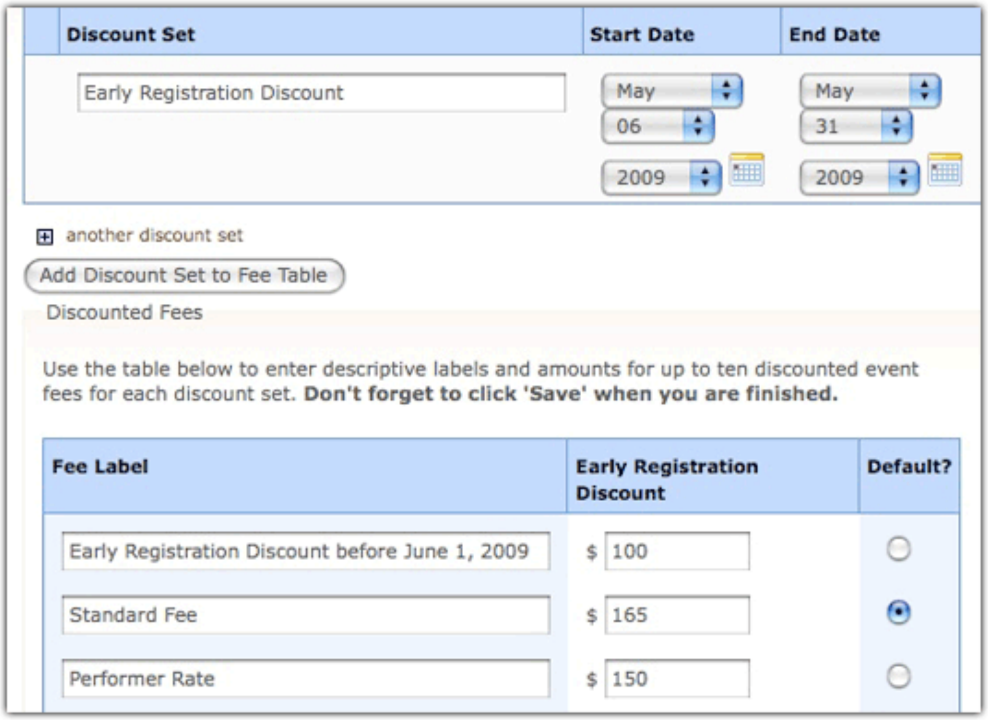
- What Financial Type will be assigned to paid registrations for this event? Although the most common value for this field is simply Event Fee, CiviCRM provides the flexibility to define multiple Financial Types and assign them to different events as needed. See *Set-Up* in the *Contributions* section for details.
- Do you want to allow registrants to pay later by mailing in a check, paying on-site with cash or credit card, or arranging some other payment method? If so, you can enable the Pay Later option and define a label and payment instructions. If you keep this unchecked, registrants will be required to pay by credit card.




- Can you use **Regular Fees** for this event, or do you need to use a **Price Set**? Regular fees are easy to set up: each fee amount has a label assigned and you can set a default fee. Here's a simple example:



- **Price sets** - examples and steps for creating price sets are covered later in this section.
- You can also configure early bird discounts (discounts determined by sign-up date). These override regular event fees. This discounting method is available only for the regular fee structure. Implementing other discounting rules or discounts for price sets requires additional programming. You or your developer should refer to the section on extending CiviCRM for more information.




- Discounts are structured in parallel with the base event fees. After creating your list of fee options and enabling the discounts feature, you must create the discount set and add it to the fee table. To help you create a discount set, a new fee table will appear toward the bottom of your page, duplicating the original fee table shown in the previous screenshot. You can now edit the labels and fees to correspond to the discounts offered for each of the original fee options.
- You can create multiple date-based discount sets for an event. This may be useful if you have a series of early bird dates that progressively increase the cost of registration as the date of the event gets closer.

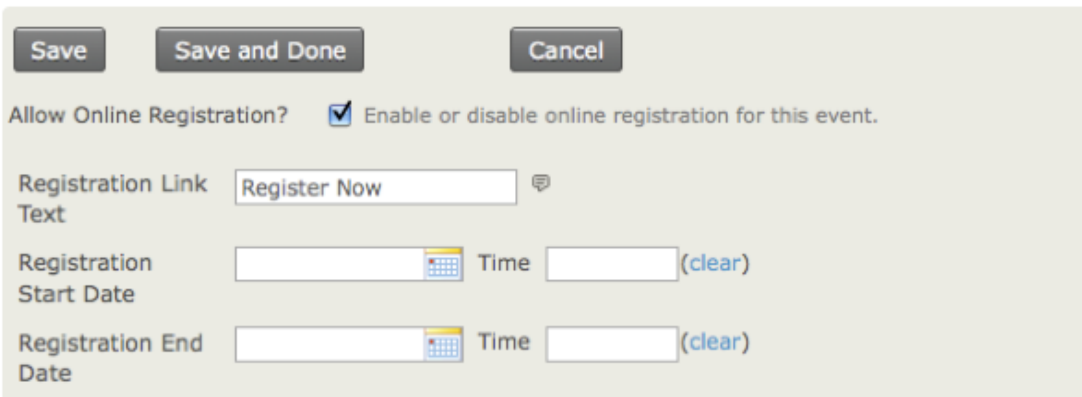
Click **Save** and advance to the next step.

## Online Registration

Your organisation may want its staff to register participants manually. However, allowing people to register online (self-service) through your web site offers many benefits. Online registration is convenient for your constituents and can save staff time and resources.

To offer online registration, check **Allow Online Registration** and use the options on this form to configure this feature.

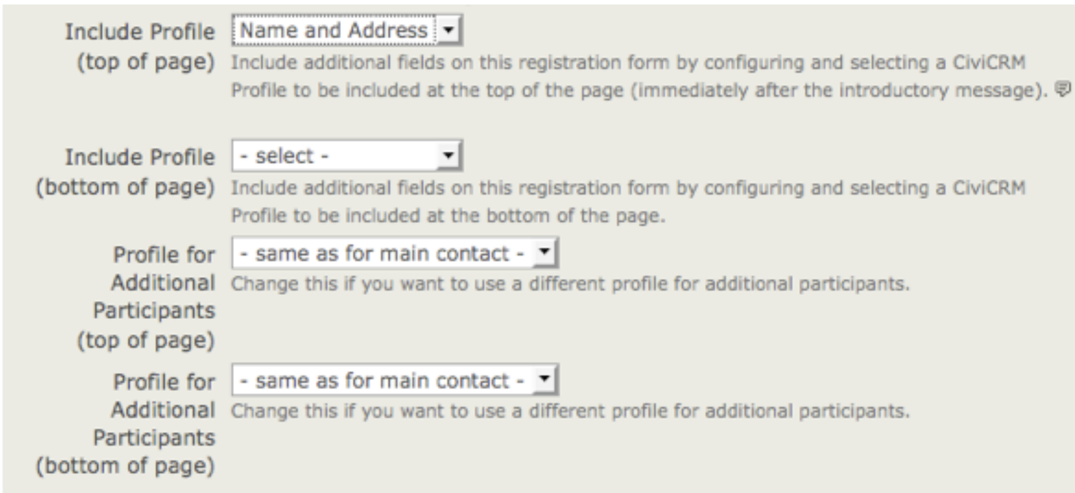
- Define the text to be used as the link to the registration form, and set the starting and ending dates for registration. The link text is used in the event information page, and is most commonly "Register Now" or similar. The start and end dates define when web site visitors may register for the event. The registration end date may be different from the start date of the event, as you may want to close registration in advance of the event in order to prepare name tags or perform other administrative functions.



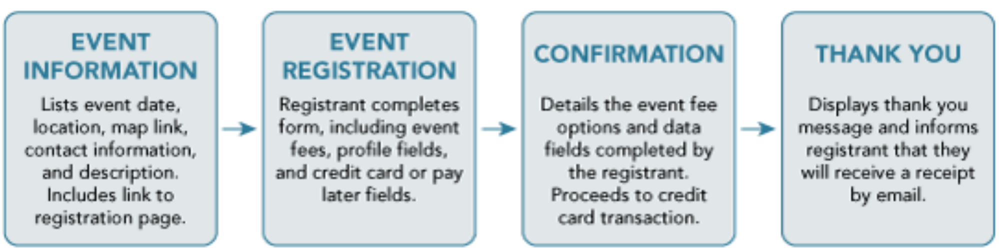

- Enabling "Register multiple participants" lets individuals register as many people as they choose for the event and pay the fees with a single transaction. For example, an organisation may be sending multiple people to a conference, or an individual may bring their partner and wish to register and pay for both in a single process. By default, this option requires a different name and email address for each person registered.
- Checking "Allow multiple registrations from the same email address" provides the same capabilities, but without requiring distinct email addresses for each registrant. In either case, CiviCRM uses a separate contact record (either an existing one if it's already in the system, or create a new one) for each individual registered.
- The Registration Screen configuration defines introductory and footer text for your registration page, and the profiles included in the top and bottom regions of the form. If you come to this stage in the wizard and have not created your profile form, you may continue with the event set-up process and return to the event configuration page later to select your desired profiles.
- What other data do you want to capture from your participants as they register? By default, the CiviEvent registration page requires only an email address. Organizations typically want to collect additional contact information from the registrant, as well as define fields unique to this particular event (such as meal choice). The custom data fields and profiles used here (see screenshot) must be created before you reach this form, as described earlier in

this chapter. Here, you can include as many profile form snippets as needed in your registration page. It's a good idea to put contact data (name, address, etc.) in one profile snippet, and event related information (e.g. meal choice, childcare requirements, etc.) in a second profile.

- You can collect different information from additional participants by selecting different profiles, or the same by selecting "same as for main contact".

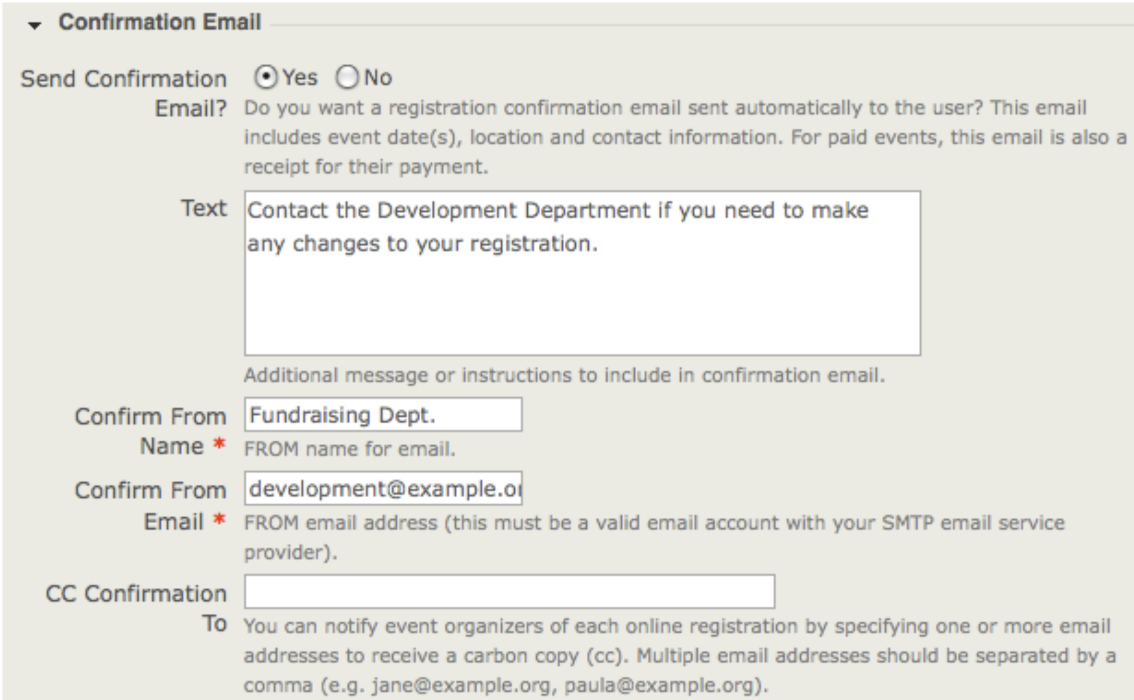



The remaining fields on this page allow you to define the text displayed on the Confirmation page, Thank-you page, and emailed confirmations/receipts (if enabled). The standard page flow is shown in the following screenshot:




For free events, the Confirmation step is skipped. When completing the Confirmation, Thank-you, and Confirmation Email sections on this page, take care to think about the user experience at each stage in the process. Ensure that the text is appropriate to the point where the registrant will be in the registration process.

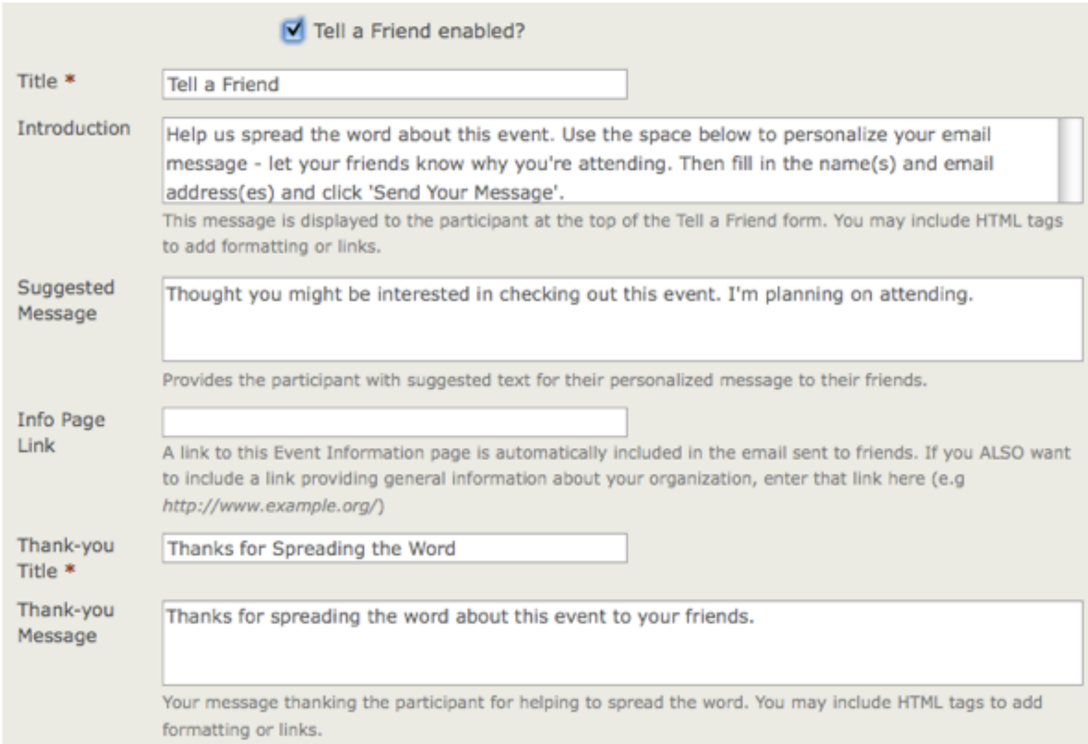
For most events you'll want to enable the Send Confirmation Email feature (see following screenshot). For paid events, the confirmation email also acts as a receipt. Make sure that the Confirm From Email address entered is a valid email account on your mail server. Add one or more staff emails (separating multiple email addresses with commas) to the CC Confirmation To field if you want real-time updates on who is registering for your event.




Click **Save** to save your entries and continue with the next step.

### Tell-A-Friend

CiviEvent makes it easy to leverage the social networking power of your committed constituents by empowering them to quickly and easily share details about your organization and event with their friends and colleagues. The final step in the event creation is a page where you can enable "Tell-A-Friend" capabilities. You can define the text and links to be included on that page and in the email sent from the tool (see the following screenshot).




A "Tell a friend" activity record will be added to a participant's Activities tab each time she sends mail to her friends. This allows you to track your most active supporters and engage them further. The people who are emailed using this feature are also automatically added to CiviCRM as contacts.

### Personal Campaign Pages

If you enable Personal Campaign Pages (PCPs), you offer completed event registrants the ability to create and customize a page of their own to either:

- promote the event for which they registered
- promote an online contribution page

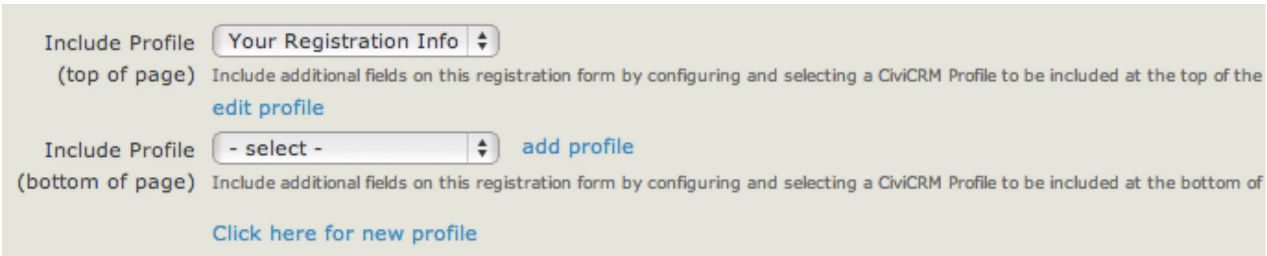
For more information see **Contributions > Personal Campaign Pages** in this book.  This is the last step in creating an event. Click **Save and Done.**

## Including profiles in an event registration page

The best way to collect additional information (such as food or lodging preferences) during online registration is to include profiles in your event configuration.

Do this as follows:

1. Navigate to **Events > Manage Events**.
2. Click **Configure** for the appropriate event.
3. Click the **Online Registration** tab or link.
4. Select from the dropdown menus one profile for "top of page" and another profile for "bottom of page".
5. You can add even more profiles if needed by click this link on the form: "Click here for new profile".

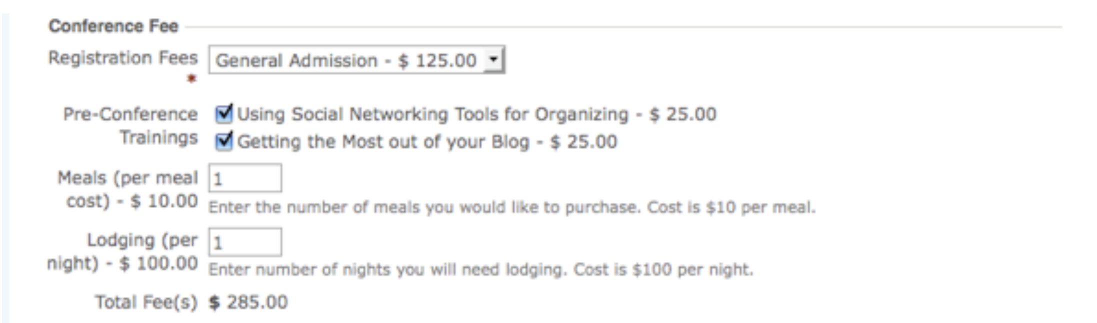



By default, when creating an online registration form the profile "Your Registration Info" will be selected automatically. This consists of only one field: the visitor's email address. Alternatively, you could deselect this profile and add the email address to another profile placed anywhere in the form. However please note that email addresses are not required, and an online registration can be created by using a profile which only takes the name of the participant (although if you do this, be sure to uncheck the option "Send confirmation email?" at the bottom!).

If the profiles you require do not already exist, you will need to create them. See "The User Interface" for information on how to do this.

## Complex event fees with price sets

Price sets play a role similar to custom data fields and profiles, but support options for event fees instead of basic data collection. Here's an example of how a price set looks to a person who is registering for a Conference that includes optional pre-conference training sessions, meals and lodging:



We saw earlier that event creation involves setting up event fees. The standard fees layout form is a very simple structure, allowing you to create a list of fees and their labels. The resulting layout allows the registrant to select one option from the list. Often, this single-option format does not meet the complex demands of your event registration structure. Price sets allow you to create multiple registration fee fields and assign the entire set to an event.

To create and manage price sets:

- navigate to **Manage Price Sets** and choosing the **Events** link OR
- navigating to **CiviEvent > Manage Price Sets** and choose **Administer**.

Similar to custom data sets, you begin by creating a new price set and then adding specific fields.

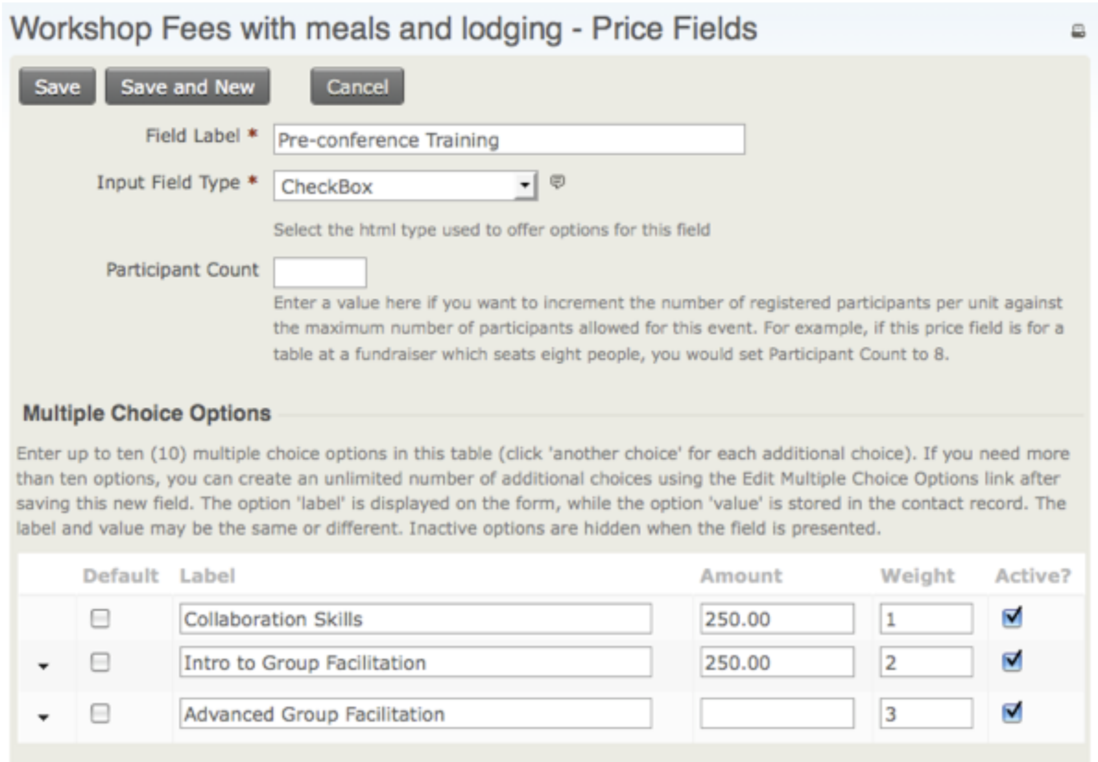
## Creating a New Price Set

To create a new price set:

1. Click **Add Set of Price Fields**.
2. In the Price Set form, enter the name of your price set, and check "Used For" > "Event". It's helpful to also add a description since Price Sets can be used by more than one event.
3. Press **Save**.
4. A form appears for you to create the first field in your price set.

## Creating a New Price Field

Begin by entering a name for the event item in the Field Label**.**




The Input Field Type has a structure similar to custom data fields, with some unique qualities and usage relevant to fee structures.

- **Text/Numeric Quantity:** allows you to set a unit price. When the form is presented to the registrant to fill it, it displays a text box where the registrant enters a quantity. The quantity entered is multiplied by the unit value to calculate the fee.
- **Select:** displays a dropdown box where the registrant selects one option from the list.
- **Radio:** displays multiple options in a list, allowing the registrant to select one fee choice.
- **Checkbox:** displays fields in a list where the registrant can select or unselect any number of options.

You can combine these field types to create virtually any fee structure.

Enter a number in the Participant Count field if you want to increment the number of registered participants per unit against the maximum number of participants allowed for this event. For example, if this price field is for a table at a fundraiser which seats eight people, you would set Participant Count to 8.

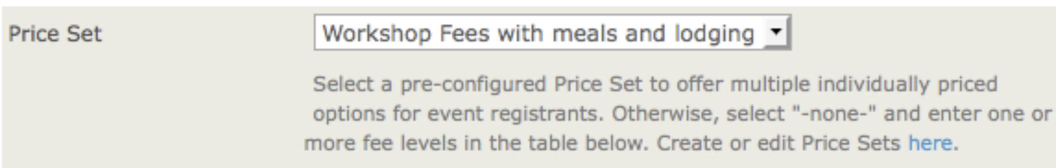
For Text/Numeric Quantity fields, enter an amount in the Price field. For Select, Radio and Checkbox types you will enter a price for each option in the table of options (shown in the screenshot above).

If you want to display the price next to the event item, check the Display Amount? box.

As when creating other custom data, you can enter a description for the Field Help, decide whether the event item is required, select whether the event item is visible to the public or only to the administrator in the Visibility field, and indicate whether the event item is Active. These fields are described in the chapter on extending core data.

Next, you can either press **Save** to finish configuring this event item, or **Save and New** to create another price field for this price set.

Once you finish configuring your price set, you can add it to your event in step 3 where you configure the event fees. Select the name of your price set in the Price Set field as shown in the following screenshot.




As with custom data fields, it is to your advantage to give thought to the structure of your registration fees and build the price set before creating the event. However, if you begin the event creation process and determine that you needed to construct a price set, you can complete the process, create the price set, and then return to the event configuration page to assign the price set.

Price sets can be reused in multiple events. This is particularly helpful for organizations that run multiple events in a series, such as a regional training seminar program.

## Testing your event

Before revealing your event to the public, you should always test the event registration process. This can be done as follows:

1. Navigate to **Events > Manage Events**.
2. From Event Links, select **Test-drive** to test the registration page. Test-drive mode will use the sandbox options for your payment processor, if available, and will create a registrant record with a test indication so that it can be reviewed and easily removed.
3. Fill out the registration form and complete the registration process.
4. In order to find the new test participant record, navigate to **Events > Find Participants**.
5. In the search criteria, check the box **Find Test Participants**.
6. If you need to adjust the event settings, navigate to **Events > Manage Events** and click the **Configure** link for this event.

7. If you discover elements that you need to edit and adjust, select **Configure** to return to the list of event setting pages.
8. If you have events where anonymous users register for events, you should also test the registration when not logged in. Refer to the Event Permissions information later in this chapter for details.

Once you are satisfied with the event information and registration form, it's time to display it on your website. The Everyday Tasks chapter includes detailed information on adding the event to your web site and promoting it.

## Using event templates to streamline event creation

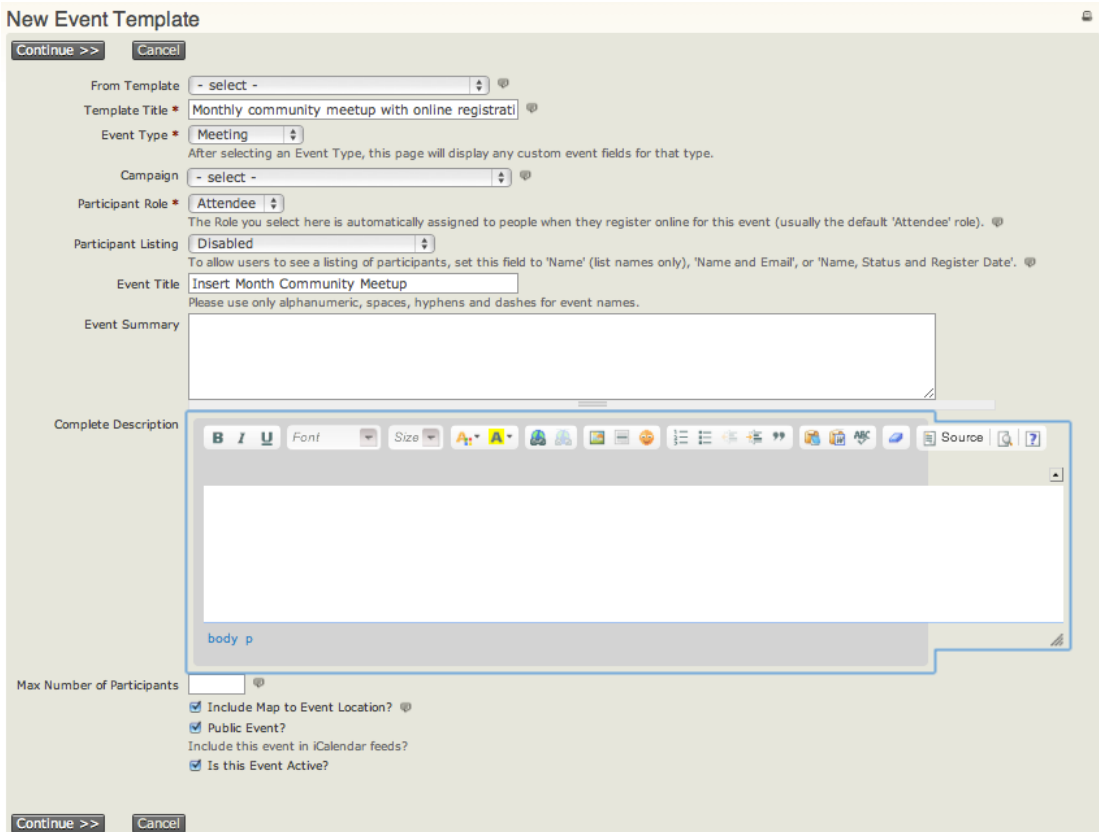
If you need to set up a number of events with similar configurations, you can streamline the process using event templates.

The steps for creating event templates are similar to those described earlier for creating an event. The main differences are:

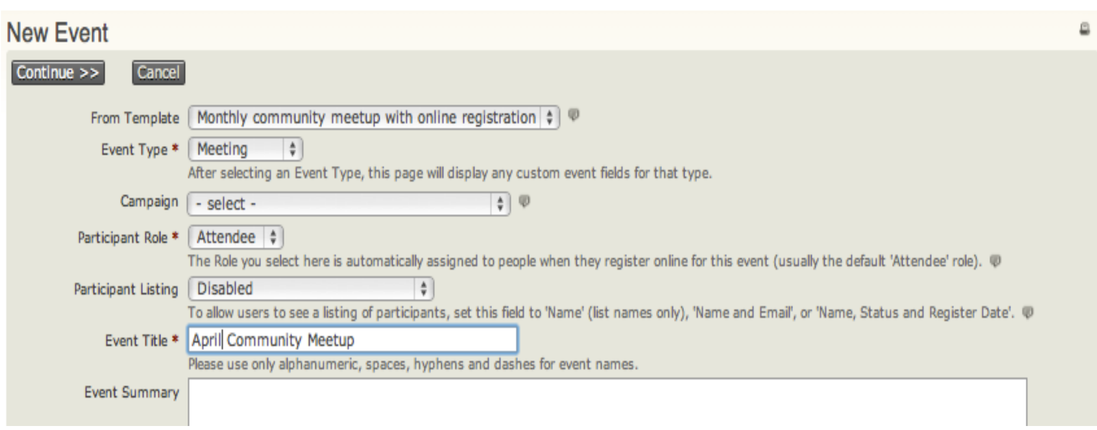
- Assign a descriptive template title that clearly identifies the type of event this template is used for (e.g., Monthly community meetup with online registration).
- There are no starting and ending dates in the template form. That information will always be specific to an actual event instance.

Click **Events** > **Event Templates**.

- To create a template, start by navigating to **Events** > **Event Templates** and clicking **Add Event Template**. Enter template title and event type.
- Select campaign if all events created from this template should be associated with a campaign.
- Continue the normal event set-up process using the settings that will be constant for all events to be created using this template.
- Common characteristics might include location, event fees, online registration settings, tell-a-friend settings, etc.




Once you've created an event template, you can select that template (as shown in the following screenshot) when you start to create a new event. Your event will be pre-filled with the saved configuration properties.




**Setting permissions for event registration**

*This section applies to Drupal and Joomla installations.*

If you've enabled online registration for events on your site you need to review the Drupal user permissions to ensure that visitors are able to view event information and complete the registration forms. Navigate to **Administer > Users > Permissions**.

Most organizations allow anonymous users (users who have not logged in) to view and register for events. If you want to allow this, you must assign the following CiviCRM module permissions for the anonymous user role:

- access all custom data - required if you are collecting information in custom fields from registrants
- profile create - required if you've included any profiles in your online registration forms
- register for events
- view event info
- view event participants - required if you want to display a listing of registered participants.

If you want to exclude anonymous visitors from viewing or registering online for events, assign these permissions to an authenticated user role.

CiviCRM has an additional permissioning system known as Access Control Lists (ACLs) ACLs allow you control access to CiviCRM data. Note that a CiviCRM ACL Role is not related to the Drupal Role. Refer to the Access Control List chapter for more information.

If you need to limit access control for specific events, you can use the Manage Access Control feature to assign access to specific groups of contacts.

PREVIOUS NEXT

docs.civicrm.org

# Online contributions - CiviCRM User Guide

*The CiviCRM community*

13-16 minutes

edit

## Creating Contribution Pages¶

This section describes setting up online contribution pages where visitors to your website can make contributions to your organisation. CiviContribute is very flexible and includes many optional fields and features such as recurring contributions, pledges and personal campaign pages. These can make setting up contribution pages seem like a daunting task. It can be quite simple though as shown by the first two procedures.

## The simplest contribution page (Receipt sent only from payment processor.)¶

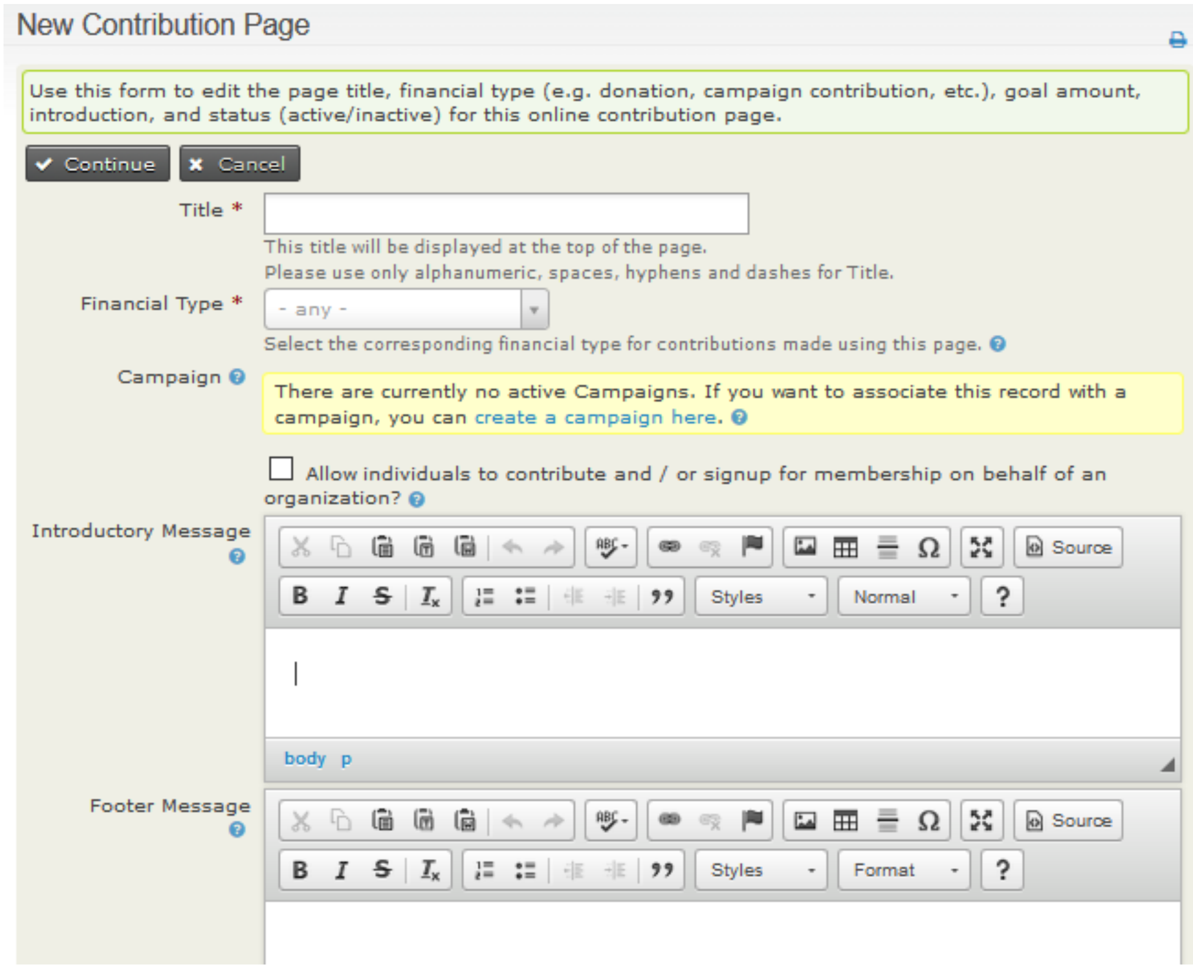
1. Make sure you have a payment processor configured.
2. Go to to **Contributions > New Contribution Page**.
3. Enter the **title** for your website page.
4. Select the appropriate **financial type**.
5. Click on **Continue**.
6. On the next page leave everything as is except for ticking the **Allow Other Amounts** checkbox and setting **minimum** and/or **maximum** amounts if you want to.
7. Click on **Save and Done**.
8. Follow the steps for your CMS to display this page on your website.

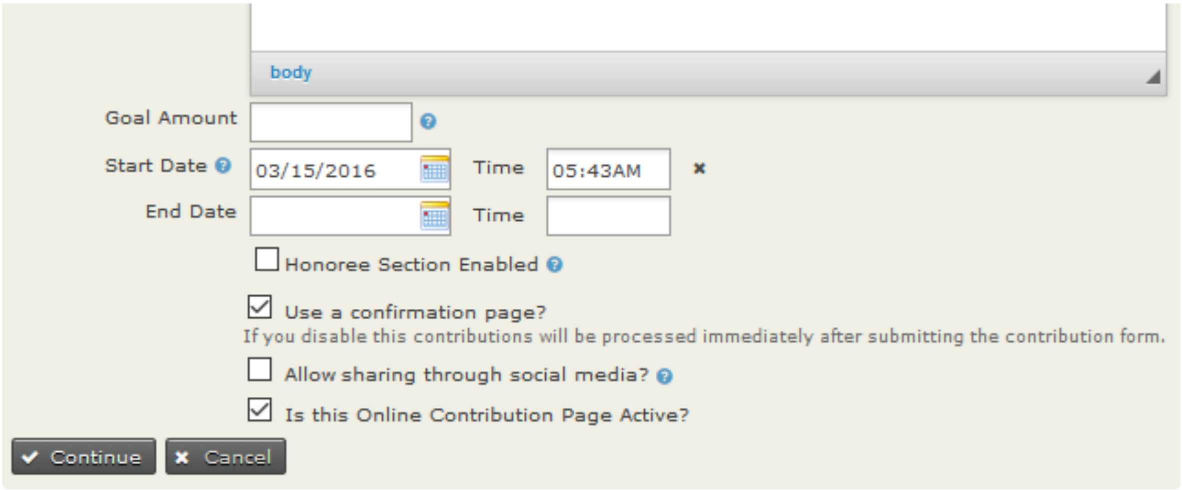
## A very simple contribution page including receipt from your organisation¶

1. Make sure you have a payment processor configured.
2. Go to to **Contributions > New Contribution Page**.
3. Enter the **title** for your website page.
4. Select the appropriate **financial type**.
5. Click on **Continue**.
6. On the next page leave everything as is except for ticking the **Allow Other Amounts** checkbox and setting **minimum** and/or **maximum** amounts if you want to.
7. Click on **Save**.
8. Select the **Receipt** tab.
9. Enter the **title** for your Thank-you page.
10. Tick **Email Receipt to Contributor**.
11. Enter the FROM email address in **Receipt From Email**.
12. Click on **Save and Done**.
13. Follow the steps for your CMS to display this page on your website.

# Setting up a contribution page - full details.¶

Navigate to **Contribution > New Contribution Page**. (**Contribution > Manage Contribution Pages > Add Contribution Page** takes you to the same screen.)



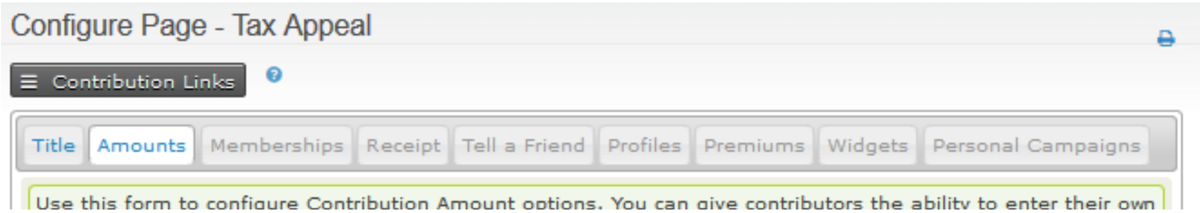


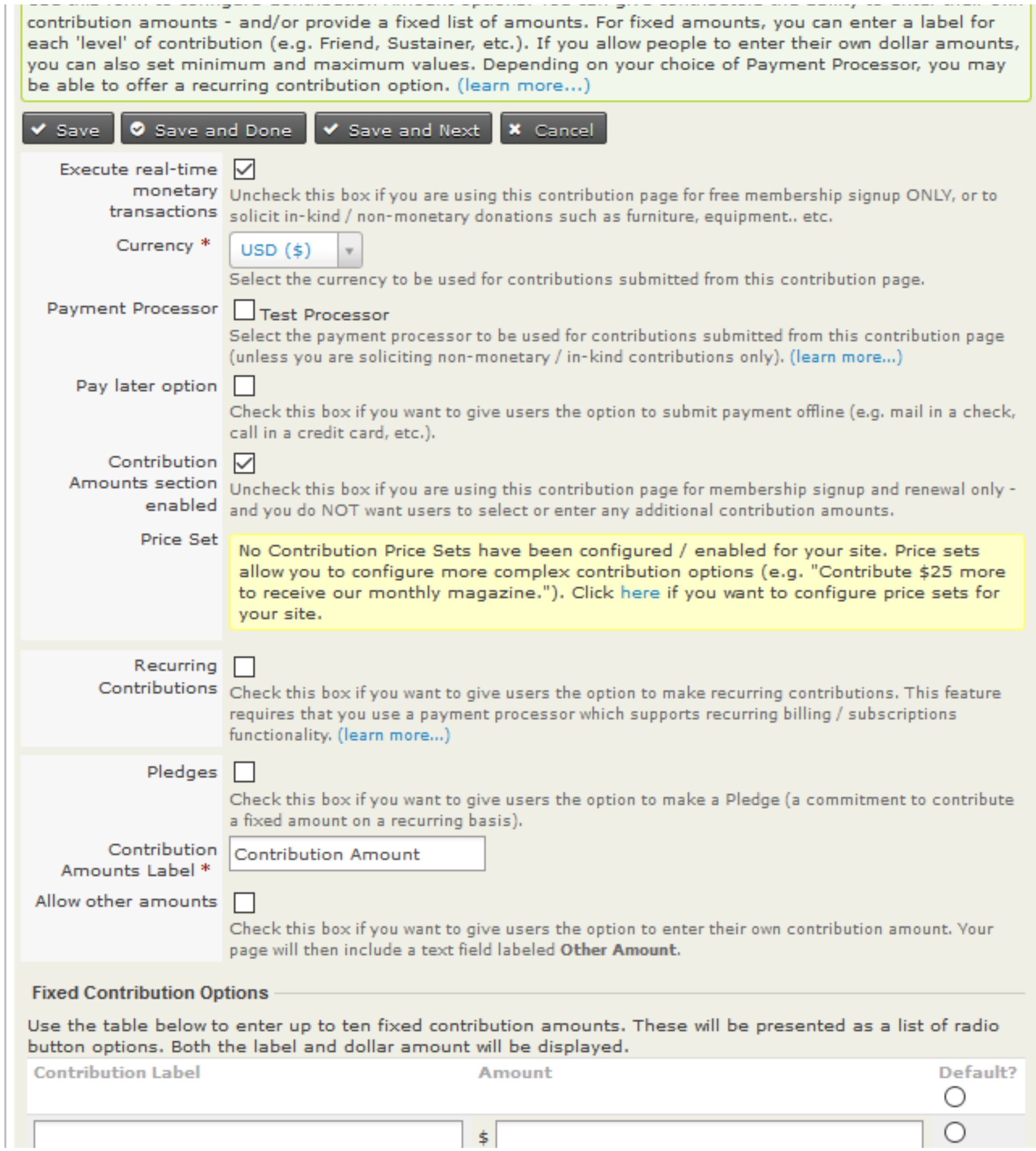

- The page title and financial type are the only compulsory fields. CiviCRM comes with four standard financial types, but you can create more to meet your organisation's accounting needs.
- Link this contribution page to a campaign. (optional)
- Compose your introductory message. (optional)
- Compose your footer message. (optional)
- Set a goal amount. (optional)
- This contribution page has to be manually enabled or disabled, but you can set a **start date** and **end date** that will apply for a Contribution Widget and Personal Campaign Pages. (optional)

- Choose whether or not to accept Honoree soft crediting.
- Choose to use a confirmation page where users can check all details are correct or to process the payment as soon as the contribution form is submitted.
- Choose whether or not to display social media links on online pages and in the automatically emailed receipt (if being sent).
- Decide whether or not to make the Contribution Page active now.
- Click **Continue**. (This is when you new contribution page is first saved.) You will be able to go back and modify all aspects of this page at any time by visiting the **Title** (and Settings) tab.

  You will now be on the (Contribution) **Amounts** tab. All the other feature tabs for contribution pages will now be visible at the top of the page. We will deal with them one by ne

### Amounts tab¶





contribution amounts - and/or provide a fixed list of amounts. For fixed amounts, you can enter a label for each 'level' of contribution (e.g. Friend, Sustainer, etc.). If you allow people to enter their own dollar amounts, you can also set minimum and maximum values. Depending on your choice of Payment Processor, you may be able to offer a recurring contribution option. (learn more...)

Save | Save and Done | Save and Next | Cancel

Execute real-time monetary transactions
Uncheck this box if you are using this contribution page for free membership signup ONLY, or to solicit in-kind / non-monetary donations such as furniture, equipment.. etc.

Currency * USD ($)
Select the currency to be used for contributions submitted from this contribution page.

Payment Processor Test Processor
Select the payment processor to be used for contributions submitted from this contribution page (unless you are soliciting non-monetary / in-kind contributions only). (learn more...)

Pay later option
Check this box if you want to give users the option to submit payment offline (e.g. mail in a check, call in a credit card, etc.).

Contribution Amounts section enabled
Uncheck this box if you are using this contribution page for membership signup and renewal only - and you do NOT want users to select or enter any additional contribution amounts.

Price Set
No Contribution Price Sets have been configured / enabled for your site. Price sets allow you to configure more complex contribution options (e.g. "Contribute $25 more to receive our monthly magazine."). Click here if you want to configure price sets for your site.

Recurring Contributions
Check this box if you want to give users the option to make recurring contributions. This feature requires that you use a payment processor which supports recurring billing / subscriptions functionality. (learn more...)

Pledges
Check this box if you want to give users the option to make a Pledge (a commitment to contribute a fixed amount on a recurring basis).

Contribution Amounts Label * Contribution Amount

Allow other amounts
Check this box if you want to give users the option to enter their own contribution amount. Your page will then include a text field labeled **Other Amount**.

**Fixed Contribution Options**

Use the table below to enter up to ten fixed contribution amounts. These will be presented as a list of radio button options. Both the label and dollar amount will be displayed.

| Contribution Label | Amount | Default? |
| --- | --- | --- |
| | $ | |

- The **Execute real-time monetary transactions** box is checked by default. You would uncheck this box if you are using this contribution page for free membership signup or to solicit in-kind (non-monetary) donations, or when you want **all** users to submit their payments offline.
- Select the **Currency**.
- Select one or more previously configured Payment Processors for this page. Some organizations find it is a good idea to offer a choice of processors. You can do this by setting up multiple processors, and checking the corresponding boxes on this form.
- Check the **Pay Later** box if you want to give users the option to submit payment offline (e.g. mail in a cheque, call in a credit card, deposit directly into your bank account etc.). If you allow pay later contributions you will need to decide on a checkbox label to display to your users and the instructions for submitting these delayed payments.
- If you uncheck the **Contribution Amounts Section Enabled** the

remaining fields on this page will vanish. You will only be able accept fixed-amount membership fees, or, if you configure a membership price set, fixed-amount memberships fees and other contributions as specified in the price set all charged in a **single** transaction.

- Select a pre-defined **Price Set** (for more complex payment options), OR enter up to 10 fixed contribution amounts in the table at the bottom of the page.)
- You can check **Recurring contributions** if you payment processor and its integration with CiviCRM support recurring billing and you want to allow this feature. (There are restrictions on recurring payments when membership fees are being paid.) If you check **Recurring contributions** further settings become visible.
- You can either set one frequency (e.g. a user can donate their chosen amount monthly) or allow for more user flexibility, where they can decide their own interval and/or number of installations (e.g. a user can donate their chosen amount once every three months for 12 installments).

- Check the **Pledges** box to give users the opportunity to pledge future payments.
- Decide on the label for the Contribution amount area on your page.
- Check **Allow other amounts** to give users the option to pay any amount they choose. You can set a minimum and a maximum amount for "Other Amount" contributions if you want to.
- Click **Save and Done**.

### Memberships tab¶

This is covered in detail in Memberships.

### Profile tab¶

If you want to collect information such as age, interests and skills that goes beyond the essential fields required to make a contribution, you can include existing CiviCRM Profiles at the beginning or end of a contribution page. You can also create new profiles.

Each profile appears on the contribution page as a fieldset with a legend header. The legend will be the profile Public Title if that is set, or else the Profile Name. A good practice is to give profiles names that are useful for identifying profiles in a list and to give profiles public titles that make a good header for the form section.

Profiles used in a contribution page can ONLY contain fields which belong to:

- contact records
- contribution records

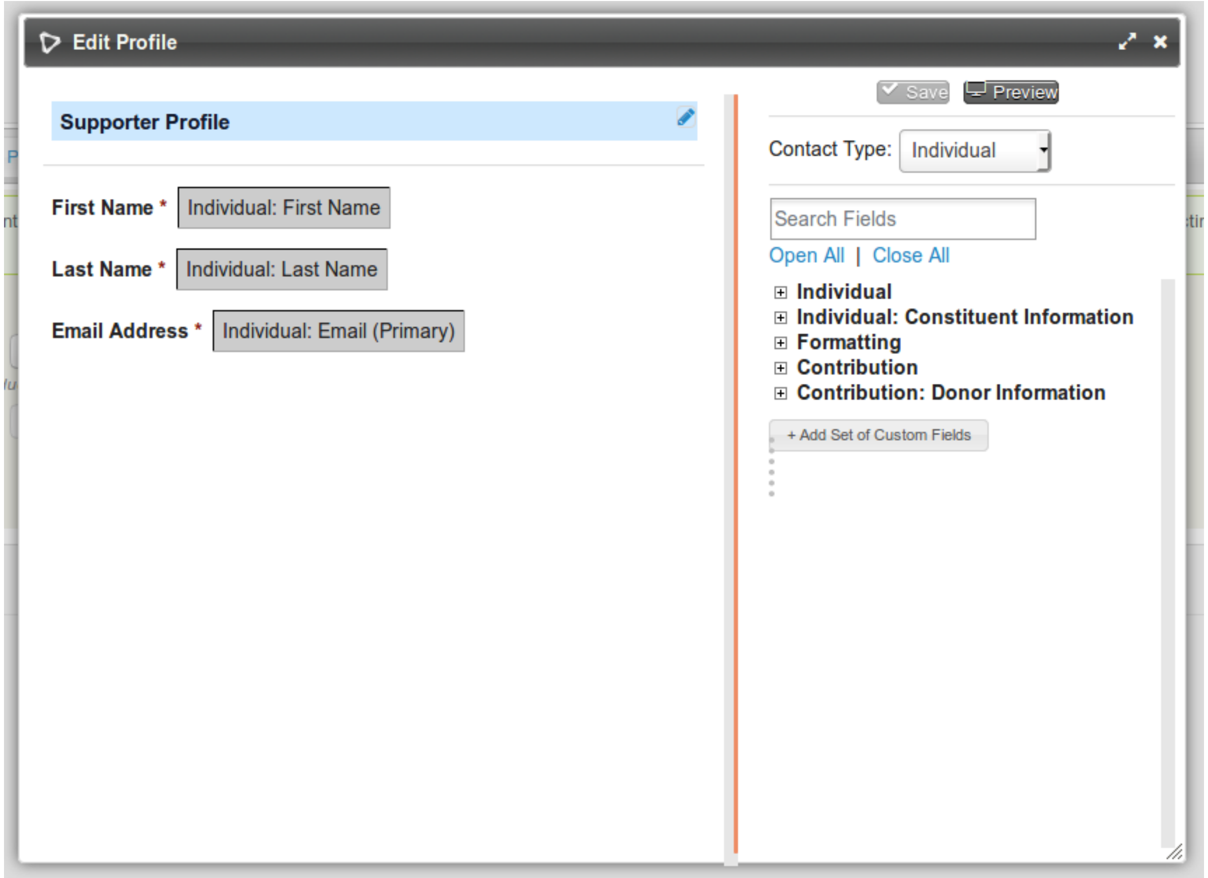
Profiles which include fields associated with any other record types will not be available for this purpose.

Contribution pages will always include a required email address field. If you do not include any profile with an email address field, an email address field will be added near the top of the form.

To add a profile to a contribution form:

1. Navigate to Manage Contribution Pages then for the page you wish to configure, click on **Configure > Include Profiles**.
2. Select a CiviCRM profile from the dropdown menu to be included at

the top of the contribution page and/or at the bottom of the page. You can then preview your selection(s), edit an existing profile, copy an existing profile or create a new profile. When you edit or create a new profile you will use the profile drag and drop interface pictured here. You may click the pencil icon to edit the profile name, public title, and pre- and post-form help text.



Warning

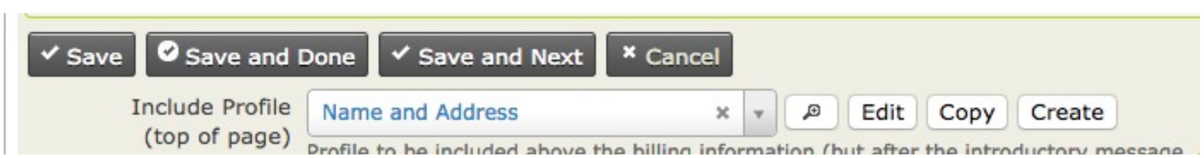
If you modify an existing profile whilst configuring your Contribution page, the changes you make will apply everywhere that profile is being used. So unless an existing profile **exactly** matches your requirements you should copy the profile, then rename and edit the copy as required.

3. Click **Save** or **Save and Done** or **Save and Next**.

Multiple address blocks

Most payment processors add a set of address fields along with the payment details. These fields will be used to save a billing address.

If you include a profile with address fields at the top of the page, CiviCRM automatically generates a checkbox on the contribution form which allows the user to indicate that their Billing Address is the same as the address entered in the profile. (If the profile is included at the bottom of the page, this checkbox will not be generated).




A number of the [Advanced Settings] for profiles take effect when a profile is included in a contribution page. You cannot edit these from the editing interface within the contribution page settings; you must go to the main profile settings form to make changes.

- **Adding contacts to a group.** Note that many donors do not wish to join a mailing list merely because they have made a donation.
- **CMS User account registration options.** A donor can be presented with the option or requirement to log in or create a user account while making a contribution.
- **Including ReCAPTCHA.** A CAPTCHA can be added to make it more difficult for bots and donors to submit the form.

Other advanced settings, such as what to do upon duplicate match, are ignored on contribution pages.

For more information read Profiles.

## Automatic Contribution Recording¶

Regardless of how donors get to your contribution page, CiviCRM automatically records their donations, freeing your staff from doing manual data entry. If the donors already exist in the database, CiviCRM adds the contribution to their existing record. If they don't exist, CiviCRM creates a new record for them.

In situations where people have multiple email addresses, or where more than one person shares an email address, it can be possible for contributions to be credited to the wrong contact. To mitigate the chance of this happening, you can adjust CiviCRM's default duplicate matching rules. For instructions on how to do this, read Deduping and Merging.

### Receipt Tab Thank-you and Receipting¶

Once you have created your contribution page, you can customise the Thank-you and Receipt emails that are sent to contributors.

1. Navigate to **Administer > CiviContribute > Manage Contribution Pages**.

2. Use the **Configure** link at the right-hand side of a contribution page in the list to access and edit the page.
3. Click on **Thank-you and Receipting** and enter the information that you wish to appear in the thank-you email. Donors usually expect a receipt as soon as their transaction is complete, so it is recommended to enable the automatic Email Receipt.
4. Click **Save and Done**.

## Publicizing your contribution page¶

Now that you've created your contribution page, it's time to bring people to the page so they can contribute. You will probably want to display a link to the page prominently on your website through a donate button or menu item. Here are some additional tips for promoting a contribution page in different CiviCRM configurations:

The most direct way to expose your contribution page or membership signup/renewal page on the front of your web site is by creating a menu item.

1. Navigate to a menu and create a new CiviCRM item.

2. From the list of menu options, choose Contributions.
3. In the basic parameters section, select the contribution page you would like exposed from the dropdown menu.
4. Save the menu item and view the website to confirm the page's functionality.

   From the contribution page listing, select Live Page to view the finished page. You can then copy the URL and include it in a content page or assign it to a menu item.

### Page or Post in WordPress¶

You can easily embed your contribution page in a post or page on your WordPress front-end site.

1. Login to the administration dashboard of your WordPress site.
2. Click on **Pages** or **Posts > Add New**
3. Click on the CiviCRM icon next to Upload / Insert
4. Select Contribution Page as your Frontend Element
5. Select the desired contribution page

6. Save the page or post, and your contribution page will automatically be embedded within your site's theme on that page.

### "Pretty" URLs¶

CiviContribute contribution pages have "ugly" URLs - in other words, they are difficult to remember. An example is *:*

*www.myorganization.org/civicrm/contribute/transact?reset=1&id=1*

On the other hand, "pretty" URLs are much easier to remember and use in your organization's outreach, for example:

*www.myorganization.org/donate*

A pretty URL is simply a URL redirect (automatically taking people from one page of your web site to another). Drupal provides a helpful module called Path Redirect (http://drupal.org/project/path_redirect) that lets you can create URL redirects from the user interface without complicated web server configuration. Joomla! users also have a work-around if Search Engine Friendly URLs are enabled in Global Settings. You can then create a menu link to the contribution page and define the "pretty" URL using the alias field.

### Personalised Email¶

Emailing your current membership is the other critical way to publicize the campaign. The CiviMail component of CiviCRM allows you to send targeted emails to any group of contacts in your database. Within a CiviMail message you can include links to the contribution form and use CiviMail's tracking capability to see how many people click on that link.

One time-tested way to increase contributions is to use checksum tokens to send each constituent a personalized email with a link to the contribution form that has all of their contact information already filled in. This saves them the hassle of filling it out and raises the chances that they donate.

# Everyday tasks

This chapter contains step-by-step instructions for performing important everyday tasks with email.

## Send an email to one person (with CC and BCC)

You can use CiviCRM to send an email to individuals. Using CiviCRM for this purpose is useful if you want other people at your organisation to see the email or if you want to send an email based on a pre-defined template.

1. Find the person you wish to email. There are two common ways to do this:
   - Use the Quick Search box on the top left. Click inside the box and begin typing a part of the person's name or email address. Choose the person from the choices that are presented.
   - Navigate to **Search** > **Find Contact**. Enter part of the person's name or email address. Click Search and click on the person's name when it shows up on the search results screen.
2. From the contact summary page, click **Actions** > **Send an email** or click the **Activities** tab and choose **Send an Email** from the dropdown menu.
3. You can add additional recipients using the CC and BCC fields.
4. If you have templates defined, you can choose one from the Use Template dropdown menu. Selecting a template populates the text content and HTML content fields with the message content from the particular template you have chosen. You can then edit that content.
5. Enter your content or add content to your template. If you just wish to send a Plain Text version of your email, ignore the HTML Format section and click on the Plain Text Format section. Enter your message in the box.

   **Note:** Choosing a template overwrites any text you have in the message text area and on the subject line. If you would like to use a template, you should select it before adding any text. If you have already typed some text in the message area, copy it into a separate document before applying a template.
6. Click **Send** to send your message.

To see the activity that was just recorded of the email sent, click the Activities tab of the contact.

## Sending a quick email to less than 50 contacts

In the results from a search, CiviCRM makes "Send Email to Contacts" available from the actions dropdown menu. This allows you to send an email to more than one contact at a time. Sending an email this way is relatively quick, but it provides no options for tracking email and doesn't give contacts the option to opt out.  It is bad practice to use this method for mass mailings, which is why it is limited to 50 contacts.  For mass mailings, use CiviMail.

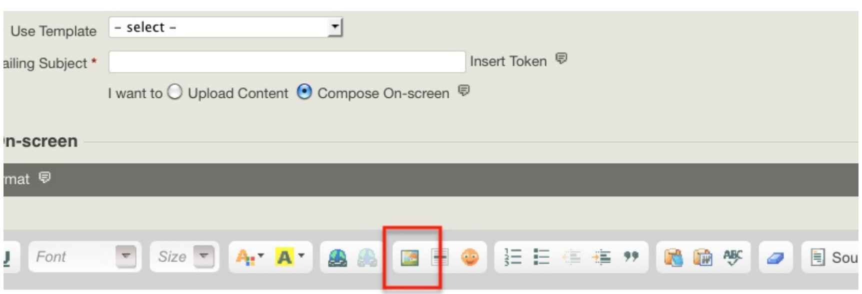
1. Click **Search > Find Contacts** (or **Advanced Search**).  Choose your search criteria and click Search (or use any other search to find the contacts that you wish to email).
2. From the search results screen, choose some or all of the contacts and click **- actions -** **>** **Send Email to Contacts**.
3. Follow the same steps as in sending an email to one person.

Each of the recipient contacts will have this email recorded as an Activity in their record. An activity will also be recorded for the sender. The activity record will also list all the other message recipients. Unlike with mass mailing (see below) there is no one place where all emails sent via the Send Email function are listed.

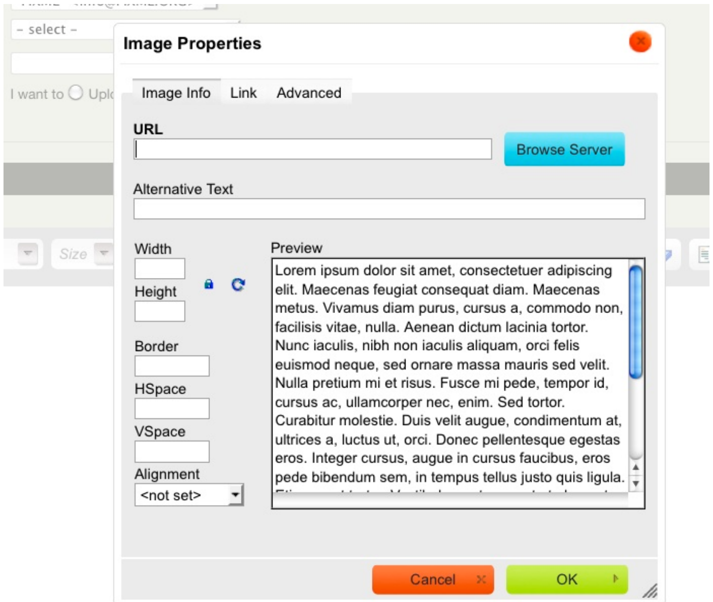
**Note:** If a message is sent to multiple recipients, each recipient will see only their own email address in the To field. Because the recipients don't see who else received the email, you might want to mention whom you are sending it to in the text of your mail (for instance: "TO: Members of the board, staff")

## Inserting an image in an email

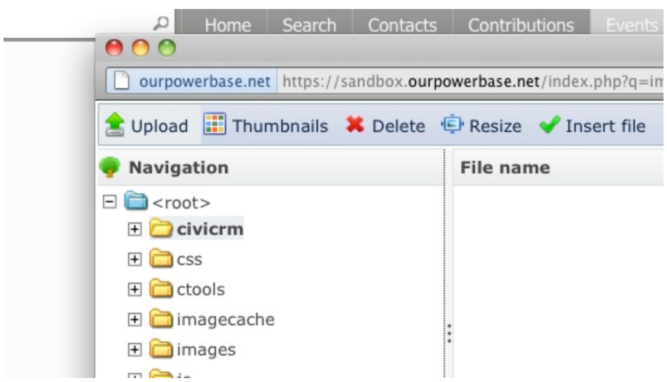
Click the **image button** in the WYSIWYG editor.




The Image Properties window will appear. Click **Browse Server** to look for image files on your server.




In the left sidebar, you will see a directory of files. If the image you need is already uploaded to your server, navigate to it in the directory and select it. If not, Click **Upload** to choose a file from your computer.

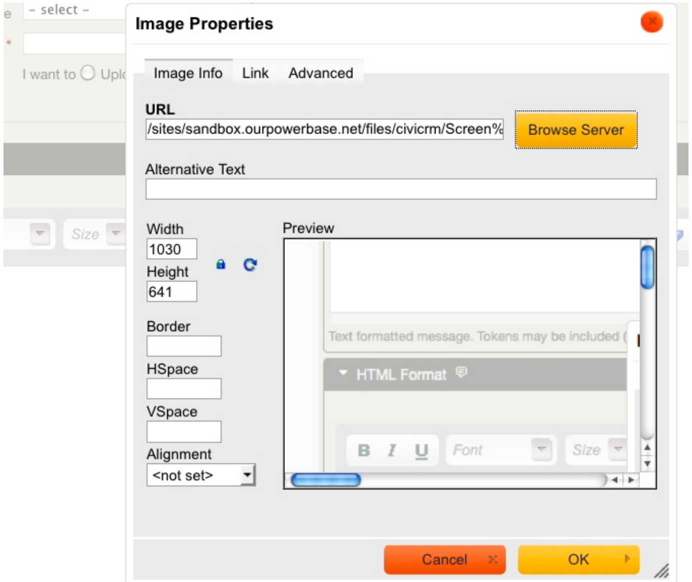



Your computer's file-browsing window will open. Find the image file you want, click to select it and click **Open**. You can repeat this process to upload multiple files to CiviCRM at once.

To insert, double click on the image you want. You'll return to the Image Properties window of your email.

Here you can add adjust the size and alignment of the image and the border around it. You can also fill in the Alternative Text field, which is text that appears when the image is not available to the reader (if they choose not to load images in their email client, or are using a screen reader due to a visual impairment). The alternative text ensures no information is lost; it's a best practice to always include alt text for images to make email accessible to all user communities.

Click **OK** to insert the image.




## Sending a mass mailing through CiviMail

Using the Mailings functionality offered by CiviMail provides many benefits over the Send Email activity, allowing you to track respondents to your mailing, process bounces, and allow people to unsubscribe from your mailings.

### Choosing recipients: Groups versus search results

There are two ways to select the recipients for your mailing—sending to existing Groups and sending to search results—and although the workflow to create the mailings is mostly the same, there are two important differences.

The first and most important is that when you're setting up Mailings to send to Groups, you can save your work at any point and continue it later. Mailings to search results cannot be saved for later editing; when you start to prepare your mailing to search results, make sure you have time to finish it.

The other difference is that for mailings to search results, you are required to choose a Group from the Unsubscription Group dropdown menu. Here's why: Every mass mailing needs a way to track unsubscribe requests. Mailings sent to Groups have this capacity built-in—the next time a mass email is sent to that Group, anyone who has unsubscribed will not be included. However, mailings sent to search results do not have this built-in way to track who has unsubscribed, so you need to provide one.

Here's how it works: If a contact who matches your search results is already unsubscribed from the Unsubscription Group that you designate, that contact will not be sent the mailing. If a contact unsubscribes via the unsubscription link in this mailing, they will be unsubscribed from this Group and therefore not receive any more emails sent to this group. This is true whether they were originally a member of the Group or not.

The Unsubscription Group you designate collects unsubscribe information only; it does not supply any contacts to the mailing. In other words, contacts who are in the Unsubscription Group but do not match your search criteria will not be included in the mailing. (If you wish to include these contacts you should include the relevant Group.)

For example: Your organization is having a big event next week. Several emails have already gone out about it, but you have added many new people to your database in the last week and you want to send them an event announcement. You do a search for new contacts via **Search > Custom Search > Date Added to CiviCRM**. This is the search that is the basis of the mailing. Your organisation stores its event email list in a Group called Event Alerts, so for this mailing, you would probably want to choose that as your Unsubscription Group.

If you do not already have a Group that would be appropriate for the Unsubscribe Group for a mailing you're planning, you may want to create one and call it something like Miscellaneous Mail Unsubscribes. You could then add that Group to other future mailings to ensure that the people who have unsubscribed are excluded from those future mailings.

## The Mailing set-up screens

If you are sending mail to an existing Group, go to **Mailings > New Mailing**.

If you're using search, perform your search (for example, using the **Search > Advanced Search**) and then choose **Schedule/Send a Mass Mailing** from the **- actions -** drop down.

The process for sending the mailing then proceeds via the following screens. You can move between these screens by using the **Next/Previous** buttons. For mailings sent to Groups, you can also save your mailing at any stage by clicking on the **Save & Continue Later** button.

**Step 1: Select recipients**

Fill out the following fields:

1. **Name Your Mailing:** Enter a name for this mailing. Select a name that will allow you and others in your organization to clearly identify the purpose of this mailing. It is recommended that you start each name with a date (e.g., "08/15/10 monthly newsletter"). This will make it easier to include or exclude recipients of this mailing in future mailings. This name is for internal use only and will not be shown to recipients. You will be asked to enter the Subject of the email later.
2. **Remove duplicate emails**: CiviCRM will always dedupe your mailing based on unique contact records. For example, if a contact is in three of the groups you are including in your mailing, they will only be sent one copy of the email. However, if the same email is used by multiple contacts, that email address will receive multiple copies of the email—one for each contact using that address. Checking this box will ensure only one email is sent to each address
3. **(Additional) Mailing Recipients:** This is where you can choose who will receive the mailing (if mailing to Groups) or further refine your mailing (if mailing to search results). You

can choose Groups to include and exclude. You can also refine your recipient list by including and excluding recipients of previous mailings.

For instance, you may want to resend an email only to contacts that have been added to a Group since the last time you sent them email, to avoid sending the same email twice to some people. In that case, choose the original mailing in the EXCLUDE Recipients of These Mailing(s) area. This will then send the message only to those members of the group who did not receive the original mailing.

You will see the final number of recipients on the next screen after you click on the **Next** button.

**Step 2: Track and Respond**

This step of the process offers options for Tracking and Responding. You can set the following options; section headers here match the onscreen sections.

**Tracking**

1. **Track Click-throughs**: This option will keep track of how many users and which users clicked on all the links in your message. This is accomplished by redirecting all links through your server. This means that all links will be overwritten with custom links containing your domain name.

   **Note for HTML mail:** Some phishing filters may mark links that are displayed differently in HTML code and in the text as unsafe. It is therefore best not to use something like <a href="http://google.com">http://Google.com</a> but rather <a href="http://google.com">click here to go to Google</a>.

   **Note for Plain Text email:** If you use short, user-friendly URLs in your email, they will all be overwritten with long links containing the name of your site and a long code looking like this http://yoursite.com/sites/all/modules/civicrm/extern/url.php?u=529&qid=29011.
2. **Track Opens:** This option allows you to track how many people opened the email you received. However, there are limitations to the effectiveness of this method. If the recipient does not show images in their email client (often referred to as "blocking remote content"), their email will not be marked as opened even if they do open it. Blocking remote content is a very common practice.

**Responding**

1. **Track Replies:** Checking this option will send replies from the mailing's recipients to CiviCRM rather than the person specified as sender. Checking this box will open the two options described next.
2. **Forward Replies:** This option is only visible if Track Replies is checked. You will need to

check this option if you want the From address to also receive the replies sent by recipients.

3. **Auto-respond to Replies:** This option allows you to send a specific automatic reply to anybody who replies to your mailing. You need to set up an autoresponder ahead of time in **Mailings > Headers, Footers, and Automated Messages**.

#### Online Publication

There is only one field in this section: **Mailing Visibility**; its dropdown menu offers two options, "User and User Admin Only" and "Public Pages." Choosing Public Pages makes this content viewable as a web page by everyone who has the permission of "view public CiviMail content."

User and User Admin Only means that only users that received the mailing or administrators can view the content of this email as a web page; the recipients will have to log in to be able to view the message.

To link to the web version in your email, insert the **Mailing permalink** token in your message in the next step. This token generates a URL on which the message can be viewed; in order to display it properly in HTML messages, you'll need to add the proper link tags using the Source icon in the editor.

#### Step 3: Mailing Content

This section will allow you to compose content for your mailing. If you have made any templates, you can choose one to use for this email. Selecting a template populates the HTML Format and Plain-Text Format fields with the message content from the template. You can then edit that content. You can also update the template, either changing the original template or saving it as a new template.

1. As you write your content, remember that every email will be sent individually. CiviCRM offers the ability to personalize each email using tokens. See "Using tokens in emails" later in this chapter.
2. If you just wish to send a text version of your email, ignore the HTML section and click on the Plain Text section. Enter your message in the box. You can also use tokens in the text version of the message. There is also a token link at the top right of the Text box.
3. Choose a Mailing Header and Mailing Footer. You can have additional Headers and Footers defined via **Mailings > Headers, Footers, and Automated Messages** (See *Set-up* for details).

**Note:** The message editing text area displays all text as Arial. However, the actual default is Times New Roman. You should change all text to your target font at the very end because future text edits often revert to Times New Roman.

#### Step 4: Test

You can test your message in one of two ways:

1. **Test Mailing:** You can specify an individual email address or a test group for your test mailing. The test mailing will fill in all the Tokens and include any attachments you are planning to send.

   It is a good idea to test your email by sending it to yourself and viewing it in your email client to make sure it looks as you expect. If you are sending a mail with a complex layout, send it to your test group and verify it from various mail clients (see *Testing templates* in the *Set-up* section for more tips on this). It is preferable to have more than one person receive your test email and give you feedback.
2. **Preview Mailing:** The preview will show you all the HTML formatting and converted tokens with your data. It will not include the attachment. There is no guarantee that all email clients will display the email exactly as it is shown in this preview, but it is useful to ensure things like font consistency, basic layout and color.

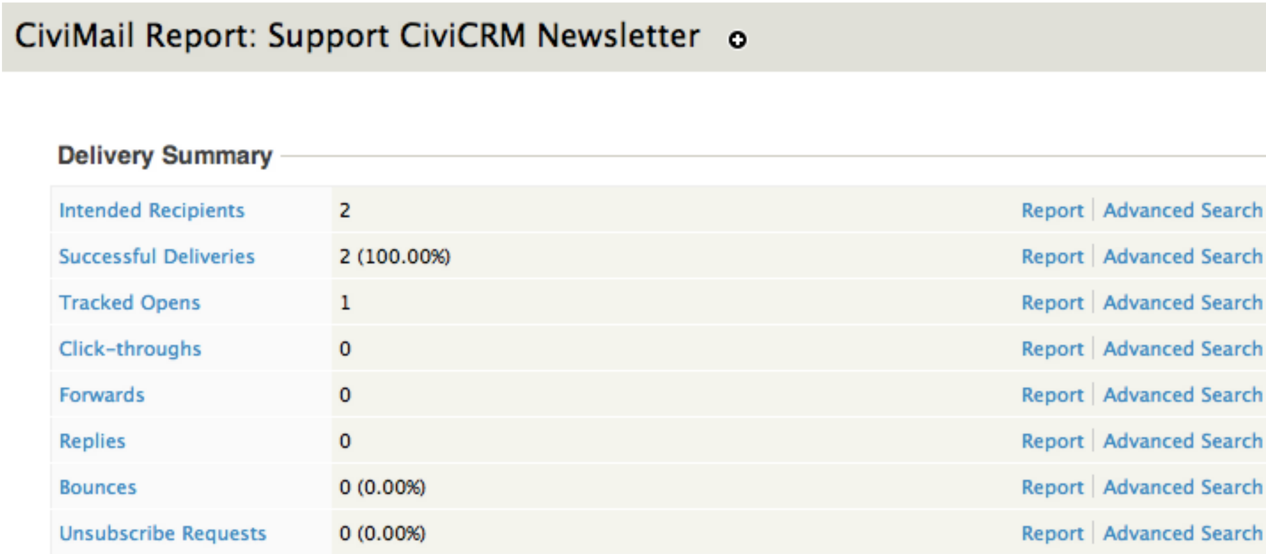
**Step 5: Schedule or Send**

This section will allow you to either send the email immediately or schedule a date and time for it to be sent. By default, CiviMail checks every 15 minutes whether an email is ready to be sent, so there can be a delay of up to 15 minutes after you request the email to be sent.

Mailings sent to large numbers of recipients are sent in batches of about 400 to avoid the emails being caught in spam filters. Therefore, the actual sending of your mass mailing can take several hours depending on your server configuration.

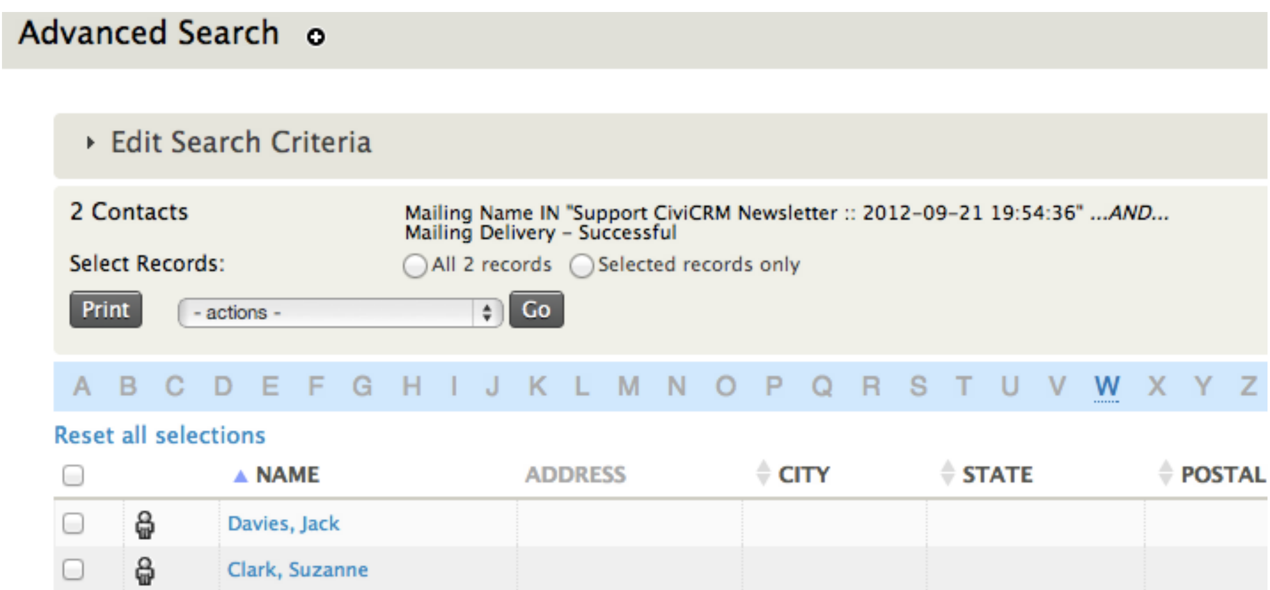
## Tracking sent mass mailings

To review key statistics about mailings sent in the past, go to **Mailings > Scheduled and Sent Mailings**. Once you have found your mailing in the list, or searched for it using the filters above, click **Report** in the "action" column. This will display basic information on all of the tracked actions, including the number of opens, link click-throughs or the percentage of bounces (see "Managing bounces" below).




To expand on this information, click the name of one of the statistics to display a list of the contacts to whom it applies, and various other details such as the time the email was opened (tracked opens). Where a mass mailing has been sent to a contact, you also view the "Bulk Email" record of the mailing in the Activities tab of their profile.

Now you might want to filter this information further. For example, of all the recipients who opened the mass email, you might only be interested in those who are between the ages of 21 and 30, or registered for a given event. Click "Advanced Search" next to a statistic to start an advanced search with the email attributes pre-filled; e.g. if the link next to "Tracked Opens" is clicked, the search fields will be set to look for all contacts who opened the email, ready for you to add extra criteria. For more information on advanced searches, see "Searching".



## Managing mass mailings

Mass mailings can be found in one of three areas accessible via the **Mailings** menu:

1. **Draft and Unscheduled Mailings**: As soon as you name your message in Step 1 and click Next, it is placed in this area. If you click **Save & Continue Later** or simply abandon a message after some steps, you can continue working on it by clicking on the **Continue** link next to the message listed here. (**Note:** Mailings started based on search results will not have the Continue link listed.)

   You can also **Delete** draft messages here.
2. **Scheduled and Sent Mailings:** When you send or schedule a mailing, it will be placed in this area and remain there until it is archived or deleted.

   You can track the success of delivery by clicking on the **Report** link next to the message.

   You can also start another mailing based on a previous mailing by clicking on the **Re-Use** link. (Note, the Re-Use link is not available for mailings based on search results.)

   The **Archive** and **Delete** links are available under the **more** link. For mailings that are scheduled but not yet sent, a **Cancel** link is available instead of **Archive**.
3. **Archived Mailings:** This area lists all messages that were archived from the Scheduled and Sent mailings area. Mailings listed here are not available to be included or excluded from the recipient list.

   It provides exactly same functionality as Scheduled and Sent Mailings, including the possibility to view Reports and Re-Use.

## Using tokens in emails

You can use tokens to insert personalized text (such as a person's name), to add action links (such as an unsubscribe option), or display standard organization information (such as domain address) into a mass mailing sent with CiviCRM. Tokens are replaced by the appropriate value at the time the email is sent out.

To view the list of available contact tokens, click on **Insert Tokens**. For more information about tokens in general, see *Mail merge functions (a.k.a. using Tokens)* in the *Working with Your Data* section of this book.

### Contact data tokens

If you want each email to address the person by first name after "Dear," you would type a space and then click on **Insert Tokens** at the top right of the HTML Format field. The popup that appears enables you to find the appropriate token by typing "First name" in the box and choose the token that corresponds. Click Close and you will see that your message now reads "Dear {firstname}." When the email is sent, the appropriate first name will be inserted into each message. Browse the Inset Tokens pop-up for a complete list of contact data tokens, including any of the custom fields that have been created for your site. You can also refer to: http://wiki.civicrm.org/confluence/display/CRMDOC/Tokens for more details.

### Action and Organizational Tokens

You can also insert action tokens, such as opt-out, unsubscribe and forwarding tokens. These tokens insert links to take the specified action; in order to display the links properly in HTML messages, you'll need to add the proper link tags using the Source icon in the editor.

You can also insert standard organization information, such as "Domain (organizational) address," which displays the address of your organization as defined at **Administer > Communications > Organization Address and Contact Info**. For a complete list of action and organizational tokens, see: http://wiki.civicrm.org/confluence/display/CRMDOC/Tokens.

NOTE: You are required to include a token for either opt-out OR unsubscribe, as well as the organizational (domain) address token in every CiviMail mailing. These can be placed directly in the body of your mailing body, or you can put them in the mailing header or footer. If your organization has developed a standard mailing footer, just include these tokens in the footer so that folks don't have to think about them each time they create a new mailing.

In general, including click-able unsubscribe and opt-out links are a bit friendlier for recipients (as opposed to the reply-to via email method). You can also provide both options. More details at: http://wiki.civicrm.org/confluence/display/CRMDOC/Tokens

### Custom and Checksum Tokens

Only contact fields, action links and organizational information can be inserted in your email as tokens. Related records, such as the name of the event for which the contacts have pending enrollments, cannot be included. However, you can provide a link to the person's contact dashboard so that they can review their registration details for themselves (once logged in).

You can create and use a token for custom data fields that you have created to store data about your contacts. You can also create a checksum token that generates a unique URL for each contact so they can modify their information without having to log in. See more information about custom and checksum tokens, including how to construct URLs you need, at http://wiki.civicrm.org/confluence/display/CRMDOC/Tokens.

**Note:** In the HTML format editing area, tokens that generate URLs (links) need to be placed in the URL field of the Link creation screen. Otherwise, they will display as text and not a clickable link in the email client of the recipient.

PREVIOUS NEXT

# Creating responsive emails using the Mosaico Extension in PowerBase

*Submitted by Alice on September 5, 2017 - 10:27am*

## What is the Mosaico Extension?

The Mosaico extension enhances CiviCRM's mailing feature by allowing you to create drop-and-drag maili are mobile responsive. You will still have the option to use the existing Mailing feature in CiviCRM and have to your existing email templates.

If you still want to use the traditional CiviCRM mailing feature, to create an email, go to Mailings menu > Ne Mailing (Traditional).

If you want to use your existing templates that you created with the traditional CiviCRM mailing features, go Mailings menu > Message Templates.

Here is the link to the webinar recording for PowerBase online workshop on using Mosaico. (https://network.progressivetech.org/system/files/Mosaico%20WEbinar%20Feb%2012%202018.mp4)

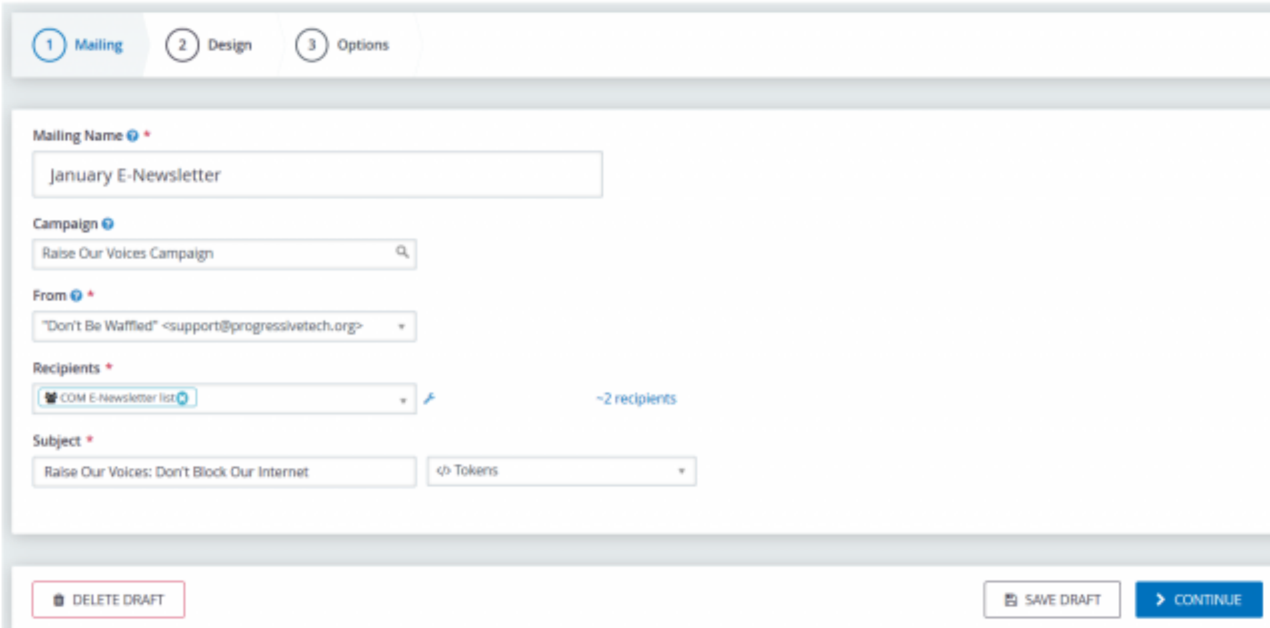
**NOTE: Currently, we find that the Mosaico features work best with PowerBase when you are using as your browser.**

To start using Mosaico Extension, the extension must be enabled (/node/1101) once beforehand. If you ha proper permissions, you can go enable (/node/1101) yourself, otherwise please email support and we will you.

To create a new mailing, click on: `Mailings menu > New Mailing`.

## 1. Initial Settings

Enter information about your Mailing:




- Mailing Name (required): Enter a descriptive name for this mailing so you can locate it later
- Campaign Name (optional): select the campaign that is related to this mailing
- From (required): select the email that will be displayed as the Sender in the recipient's inbox
- Recipients (required): select the mailing list group(s) you want to send this email to
- Subject (required): the subject line of the email. Tokens may also be used in the subject line.

Click CONTINUE to go to the next step to design your email, or click SAVE so you can edit your mailing lat

## 2. Choose a template

The next step is "Design" where you can select an "Empty Template" to start from scratch, or select an exis template. Hover your mouse over the template you want to start with and click SELECT.

In this example we will start from scratch by selecting "Empty Template versafix-1"

You will then be looking at the mail editor where on the left side you will see several format options made u different design blocks to help you build your mailing in the content area, which we'll call the "palette":

## 3. Modify your template to create your mailing

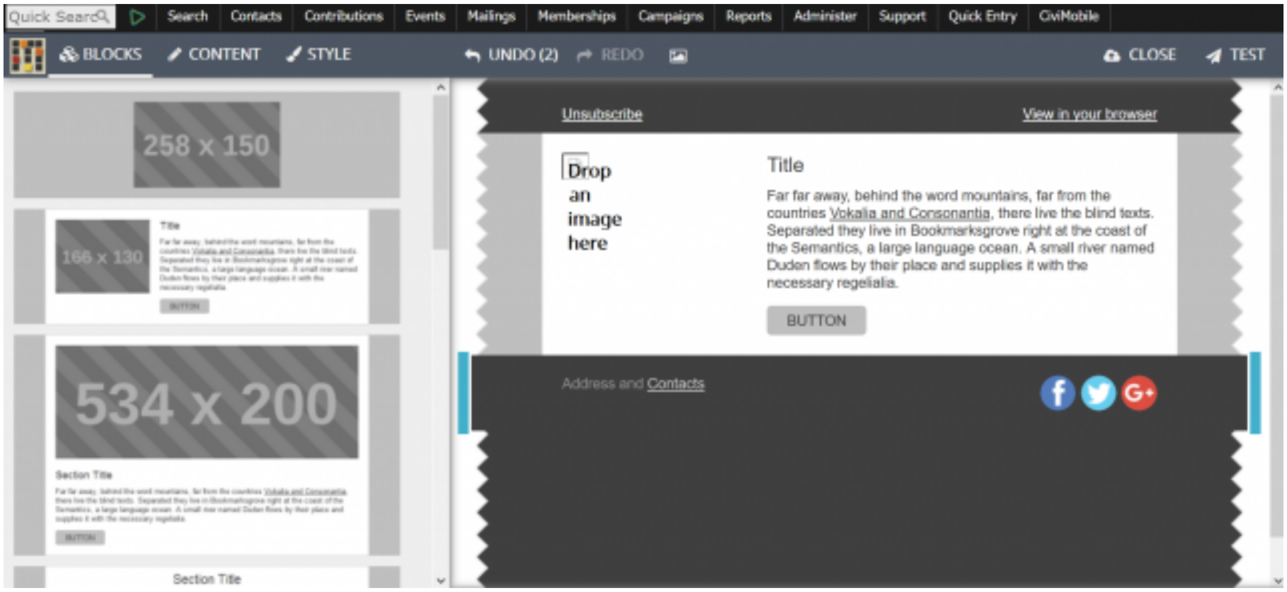
From the Block menu, you can drop and drag the blocks you want to use from the left side OR you can clic ADD button (the button will appear when you hover your mouse over the block) to add the block onto your "palette" to assemble the look you want for your email.

Tip: We suggest building your email from the top down using the blocks. You always have the opportunity t blocks around on your email template (palette) by clicking and dragging the blocks to rearrange them to yo

In this example, we'll select two blocks to build our template:

- Add a content block that includes an image on the left, and a Section Title, text area, and button on t
- Then add a footer block that contains social media icons

So our palette will look something like this:




After you've selected the blocks you want to use for your design, you can now begin editing the content of block.

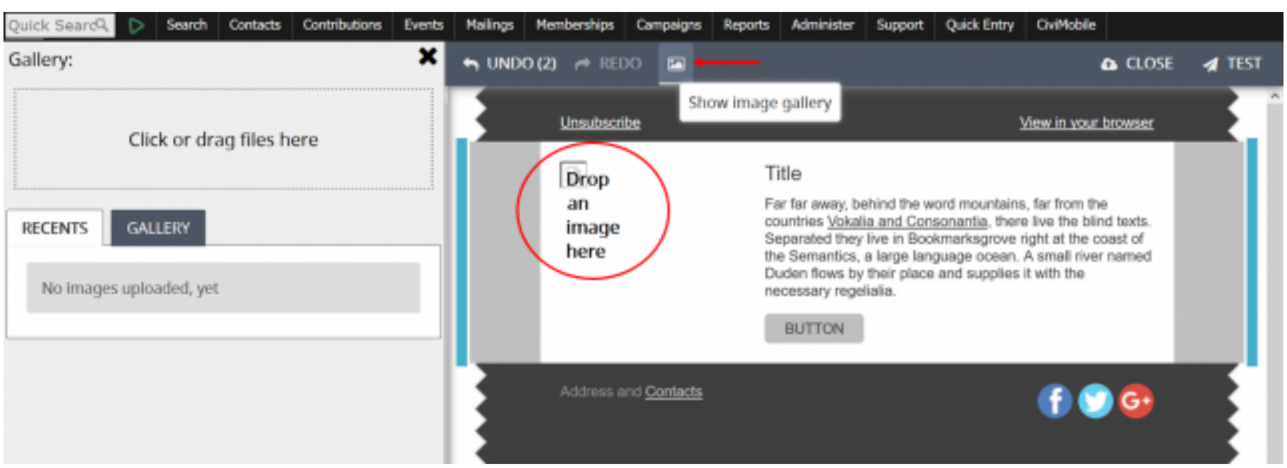
## Editing a specific design block

To edit a specific design block, click on the block to select it.

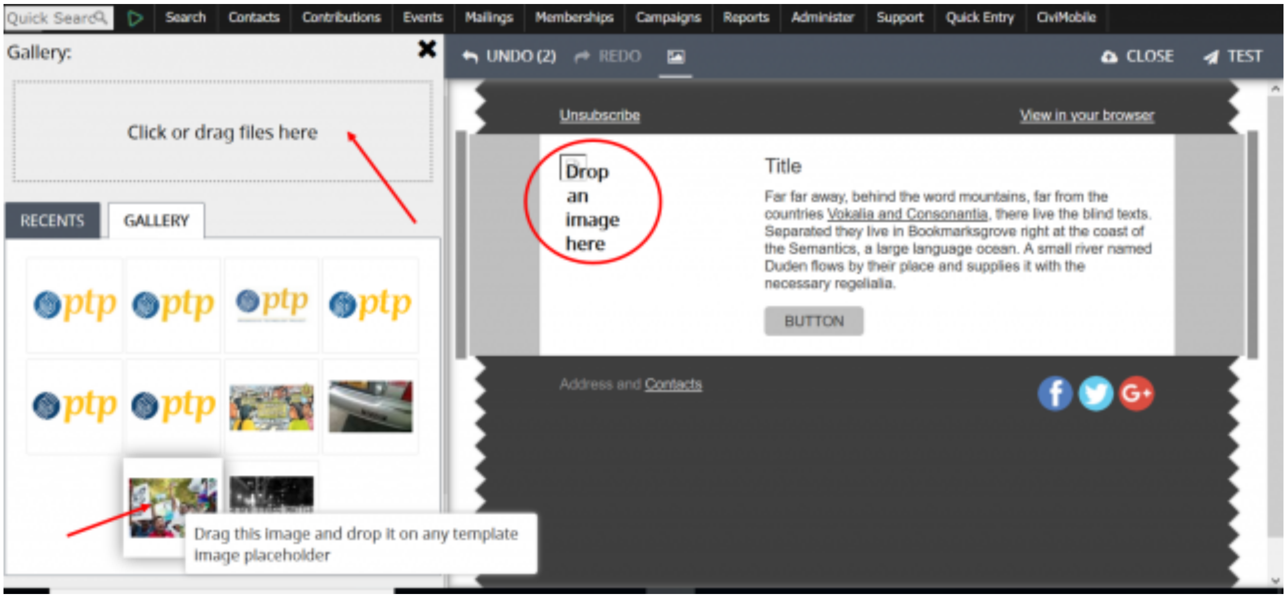
## Add an image

If your block has an area that says "Drop an image here" then it means you can add an image. Unfortunate dropping the image doesn't always work.

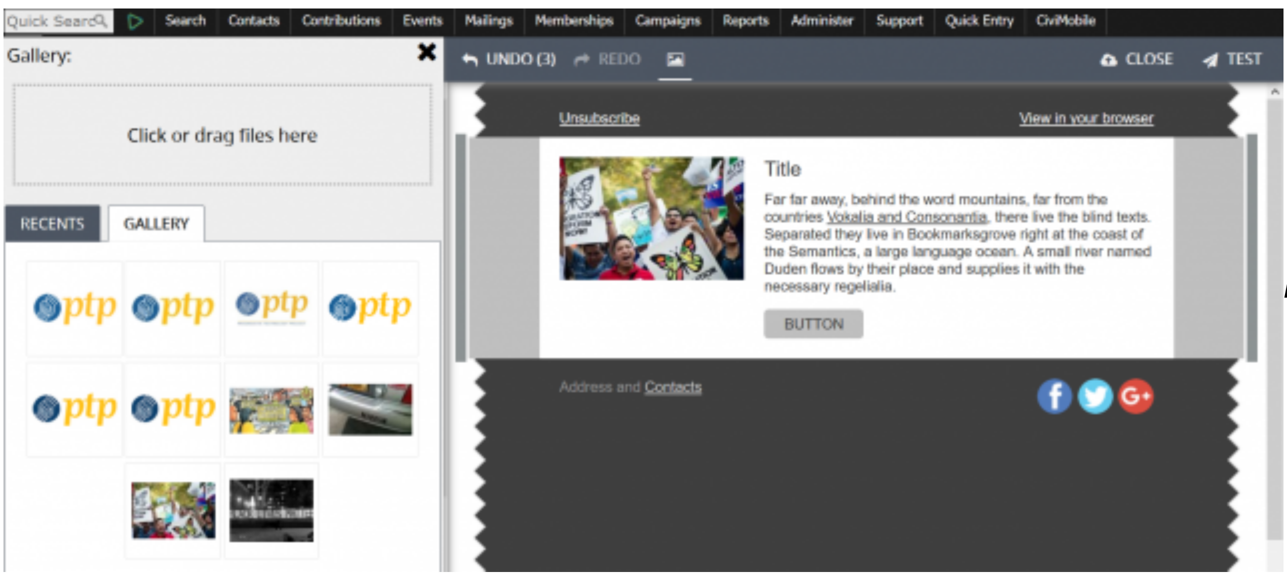
Instead, click on the image icon on the menu to view your "gallery" of images.




You will be able to select existing images in your gallery by clicking on the "Gallery" or "Recents" tab" or up new image by click in the area "Click or drag files here", which opens your browser to select the file to uplo




Then double click on the "Drop an Image here" area to highlight, then double click the image you want to a



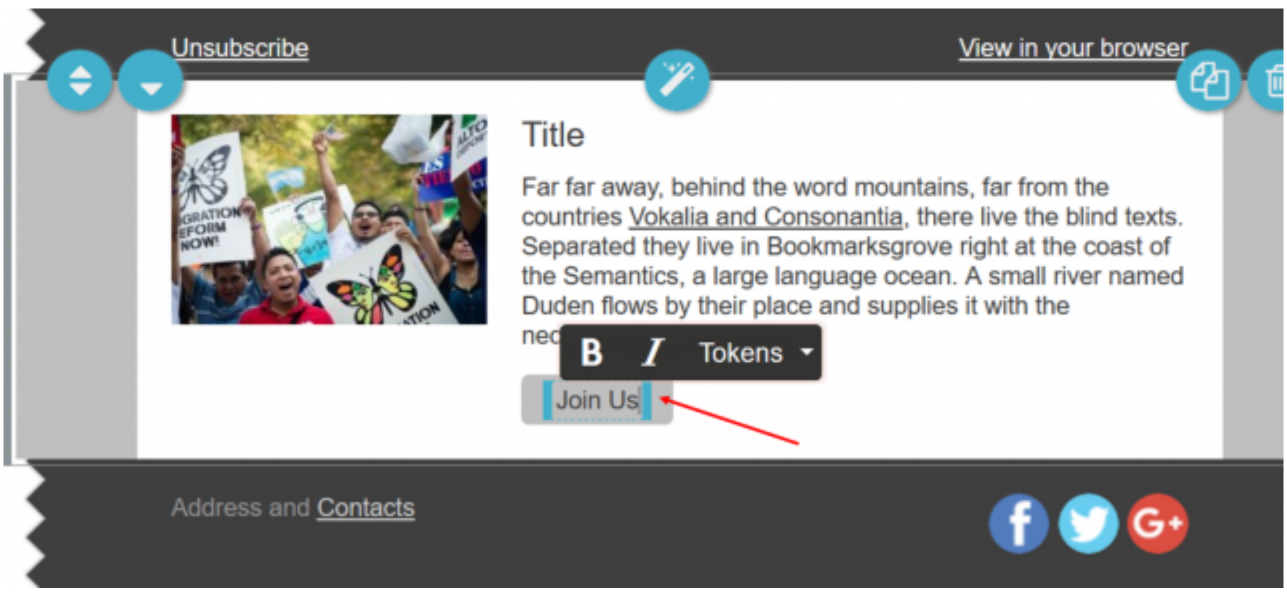

*Ph*

*Pennsylvania Immigration and Citizenship Coalition*

## Add Text

To add text, click on the text area itself and begin typing. You will see a formatting menu so you can chang and color of the text.


To edit text on buttons, just double click on the button, and you can enter the text and format the text. To cc the link for the button, use the Style menu as discussed below.




## Change styles

From the Style menu, you can change colors and fonts of text, buttons, and backgrounds and more within . block or for the entire mailing including all the blocks you've added. You first need to click on the block on y palette to select it and then click on the Style menu:

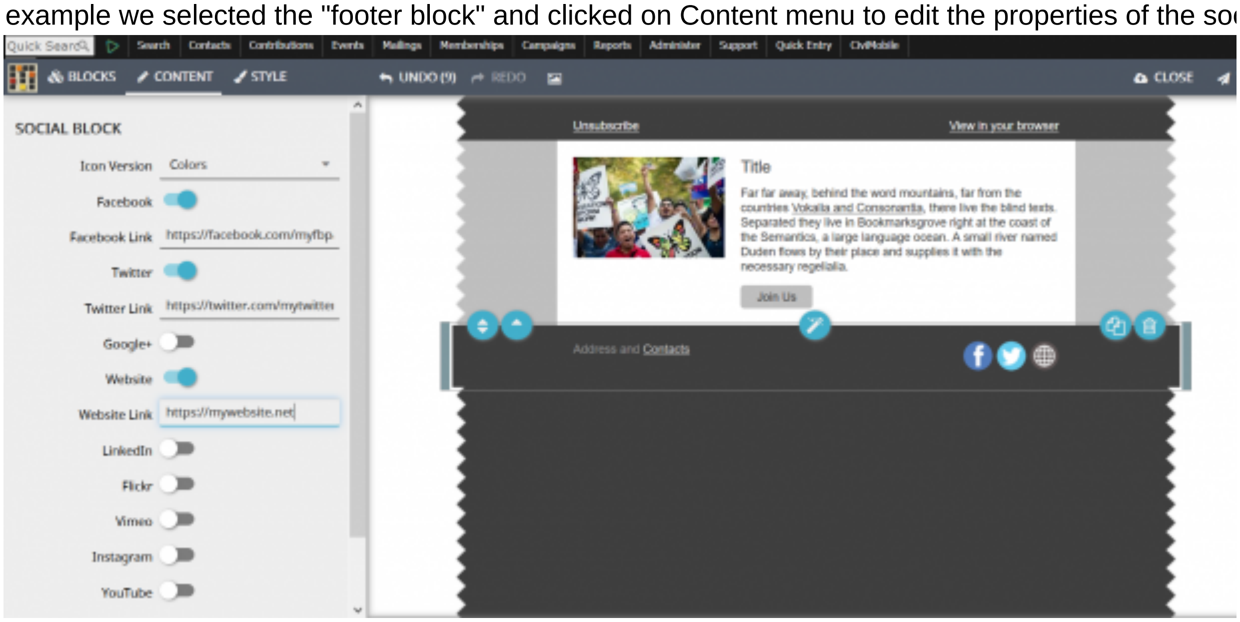
- You can edit the properties to change the colors for the background, external background, text, links buttons and images, and more.
- You can select the font and size of your text
- From the Style menu you can also switch between applying the styles to a specific block or globally blocks in your template):
    - Click on the "single cube" image to apply the style to a specific block only

- Click on the "multiple cube" image to apply the style globally (all the blocks in your template)

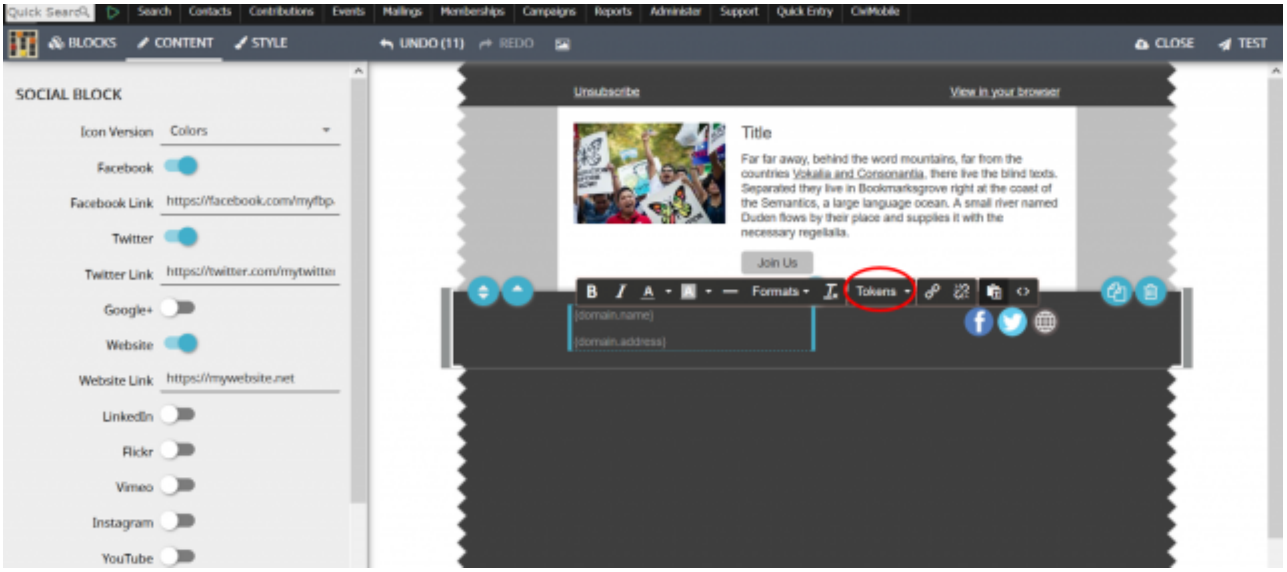

## Change other settings

- From the Content menu, you can change the content options of a selected block in your mailing. You need to click on the block on your email template (palette) to select it and then click on the Content r
    - You can edit properties of images in certain blocks if applicable (e.g. links, image size, alterna for the image) or
    - You can edit the properties of the Preheader if applicable (where the "unsubscribe" or "view in links appear) to show the block or edit the links
    - you can edit the social media area of the "footer" block if applicable (e.g. you can choose whic media icons to display and edit the links, or decide to display the social media icons in color o & white)

In this example we selected the "footer block" and clicked on Content menu to edit the properties of the so icons:

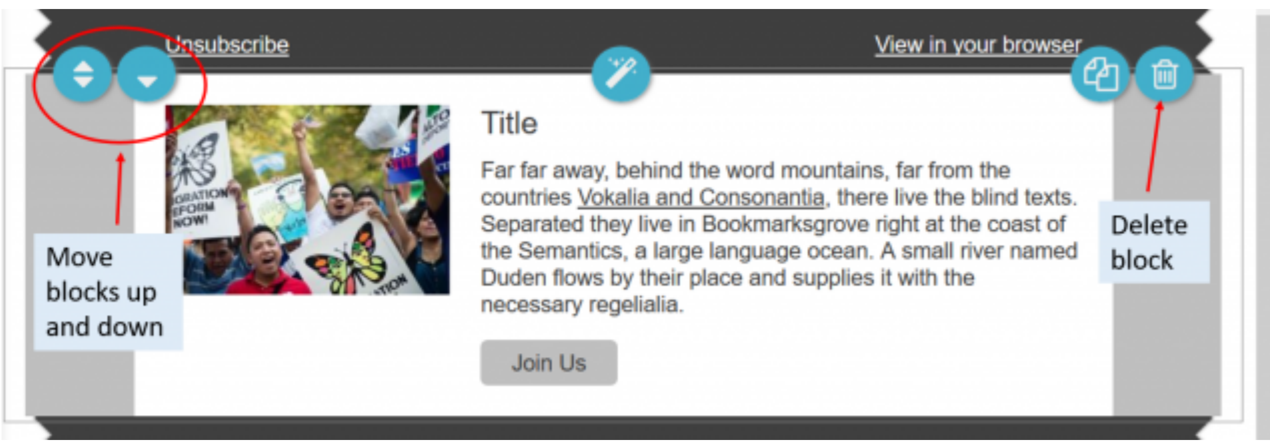


Adding Tokens by click in the text area where you want to display the tokens, and the format menu appear: click on TOKENS and select the tokens you want to add to email template.



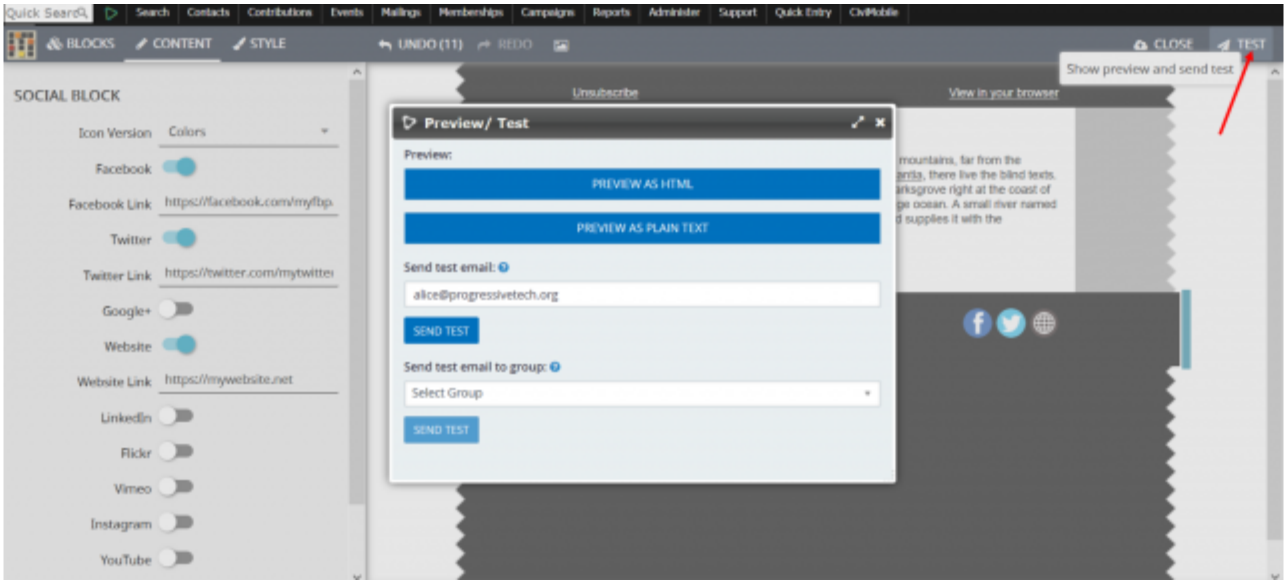
## Moving blocks around

To rearrange or delete blocks, click to highlight the desired block, then use the up and down arrow images your block to the position you want in the palette, or click on the trash icon to delete the block from your en




# 3. Testing Your Mailing

As with sending any mass mailings, you want to test your email to check for content and formatting. You ne editing your email message to access the TEST link.




You can:

- Send a test email to an individual, like yourself, by entering an email address in the "Send test email then click Send Test
- Send a test email to a group to help you proofread your email, by selecting the group you want to se the "Send test email to group:" field, then click Send Test

When you are done click the "X" on the Preview/Test window to close this window. Then click the CLOSE li you're done with editing your Design.

You can then click the SAVE DRAFT button to save the email message and return later.

If you are ready to send or schedule the mailing, click the CONTINUE button to move to step 3. Options.

## 3. Other options

You are now ready to send or schedule your mailing to be sent.

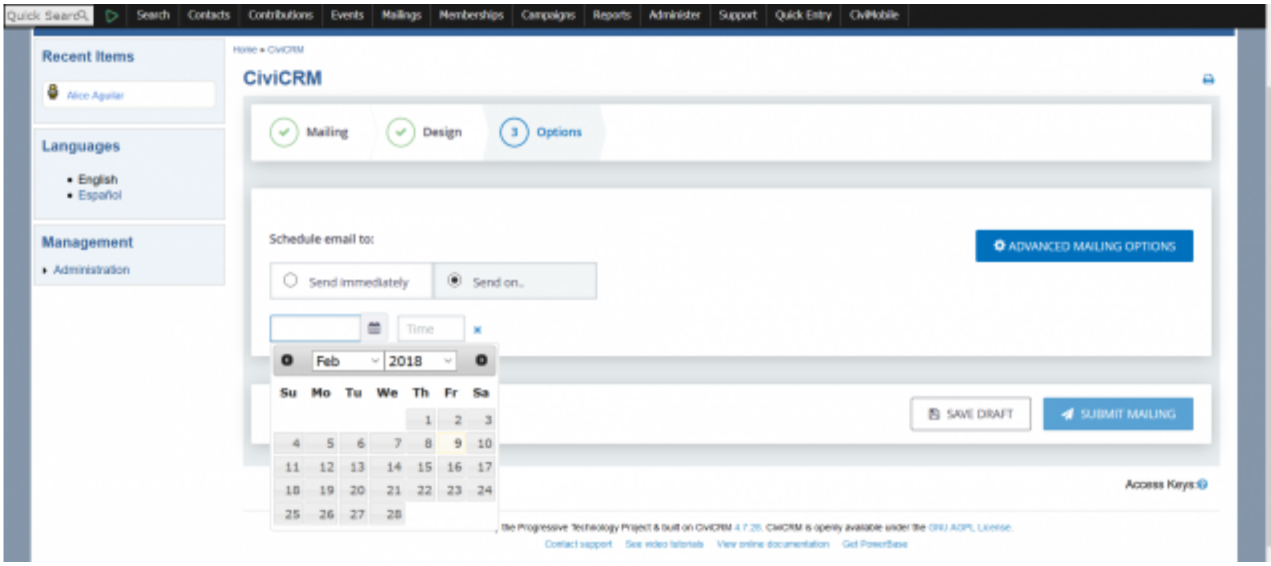
You can decide to configure Advanced Mailing Options for:

- Attachments
- Responses
- Tracking
- Publications

These options have the same functionality and settings as the traditional CiviCRM mailing options, which y find more details in the CiviCRM book here. (https://docs.civicrm.org/user/en/latest/email/mass-mailings-us civimail)

## 4. Sending Your Mailing

To send your mailing right away, select the option to Send Immediately and then click the Submit Mailing bu

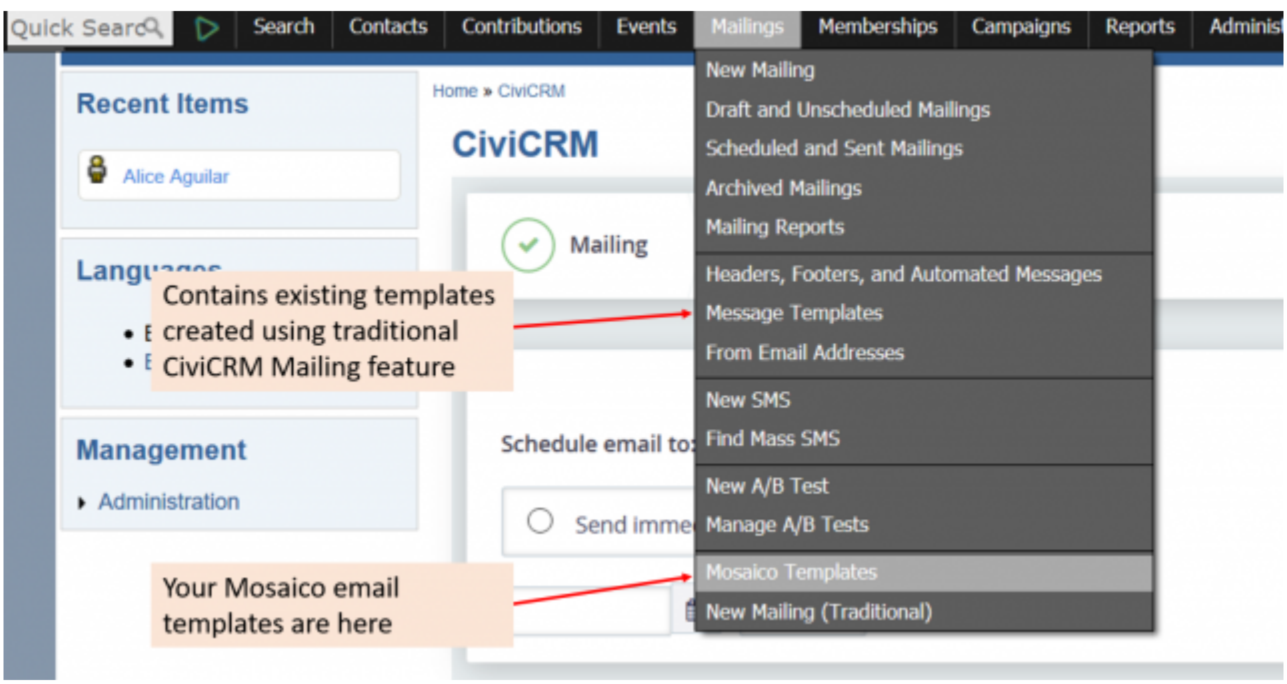



To schedule your mailing to be sent in the future select the option Send On, then select the date and time t schedule the mailing, and then click the Submit Mailing button.

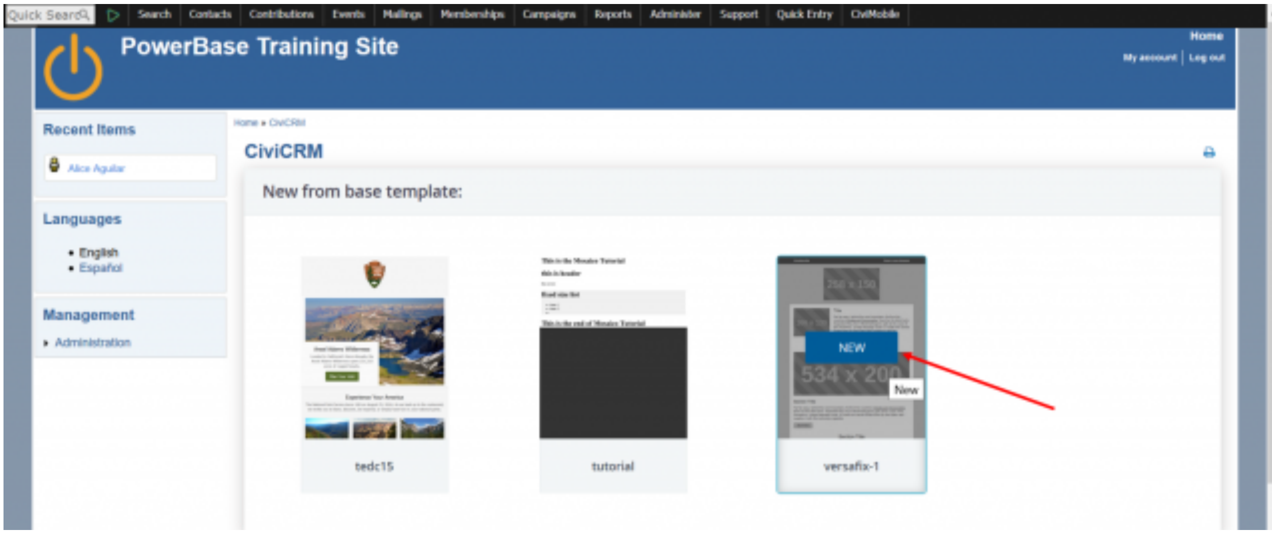
# 5. Creating Templates

If you had created email templates using the CiviCRM traditional Mailing feature, then those templates will separately from your Mosaico templates and can be found by clicking on Mailings > Message Templates.

To find Mosaico templates or to create new Mosaico templates click on Mailings > Mosaico Templates:




You can then find your existing Mosaico templates here, or you can create a new template by selecting the "versafix-1" template and clicking NEW:




Then enter a new name for your template in the Create New Template field, then click OK. Continue creati email template by following the instructions above.

**Category:**
Email and Postal Mailings
PowerBase - General

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# What You Need To Know

This chapter explains key ideas that are useful when planning your use of CiviReport. It should be read by system administrators before they start to configure CiviReport for daily use. It will also be useful for anyone who wants to better understand the thinking behind CiviReport. Skip this chapter if you just want to look at specific reports that have already been configured by your administrator.

CiviReport can be used as a management tool in organisational planning and as an analysis tool for membership or donor development. Tabular or graphical output can be produced and set up to email reports to specific people according to a schedule.

The number of questions an organisation might want to ask about their data is pretty much unlimited. The CiviCRM approach to solving this problem is to aim to cater for 90% of the scenarios and allow the system to be easily extendible by administrators and developers to cover the last 10%.

## Key Concepts

### Report templates

A report template is the base for creating any number of reports. CiviCRM comes with a number of predefined report templates that can be used to create specific reports. For example, the Membership Report(Detail) template can be used to create a report that shows all student members that have joined your organisation within the past quarter or another that shows all cancelled memberships this year.

These templates are built to satisfy the basic needs of non-profits and organisations and future versions of CiviCRM are likely to include further report templates. You can create new templates to meet the specific requirements of your organisation and contribute these reports back to the CiviCRM community for others who have the same reporting needs. Writing a new report template requires some PHP and SQL skills. See the Developer Guide for details of how to do this.

### Report vs. Search

CiviCRM has inbuilt search functionality that covers most scenarios, so it's important to know when to use a report and when to search. CiviReport gives users the ability to easily display complex information about their data, and to display answers to questions about this information in accessible ways. It is useful when you need to repeatedly ask the same question, or a set of similar questions, about your data.

The current report interface does not support most common batch actions such as Update via Batch Profile, Smart Group creation and so on. This means that if you want to perform any action against a result set, it is better to use search rather than report.



However, in some cases reports are more flexible than searches, and each has its own set of features. For example, reports allow you to change the columns displayed and in summary reports you can order by whichever display results you choose.

### Report options

- **Run the report:** you can **Print Report** so it is viewable in browser or you can generate a PDF or Export to CSV. All of these run the report once when you hit the button and allow you work with it.
- **Dashlet:** if you make a report **Available for Dashboard** users with appropriate permissions can add this report to their dashboard. This is useful for information that you want to see on a regular basis, such as a list of new members, or donations this month, etc. In this case the report is run every time the dashboard is loaded.
- **Email:** schedule a regular email of the report so that your finance office can receive a monthly email of all event fees received or your membership administrator gets a weekly email of overdue renewals.

### Detail vs summary reports

Reports often come in pairs: one showing a summary and the other showing the detail. These reports can be linked, allowing users to see information at a glance with the option to drill down in a certain report for more detail.

## Key Questions

- Should you use CiviReport for a particular task, or could it be better achieved with a search?
- What reports are available? The list is constantly growing; for a complete list of reports available in your version, along with an explanation how the reports can be used, look at the page **Create reports from templates** (in the **Reports** dropdown menu).
- What questions do you want to ask about your data? For example, you may want to know how many new members you have in a certain period, or how much money was collected during a fundraising campaign.
- What fields do you need to include?
- Does the report provide enough options or will you need to analyse further in a spreadsheet?
- Is it a one off report or will you need to run it regularly? Could you make a report template to streamline future reports?
- Who needs to see this report? Will it provide sensitive information that should only be available to privileged users or does it give useful daily updates to all?

Details of available report templates and comparison with searches are provided for each component throughout the rest of this book; refer to the relevant section for more details about component-specific reports.

# Set-up

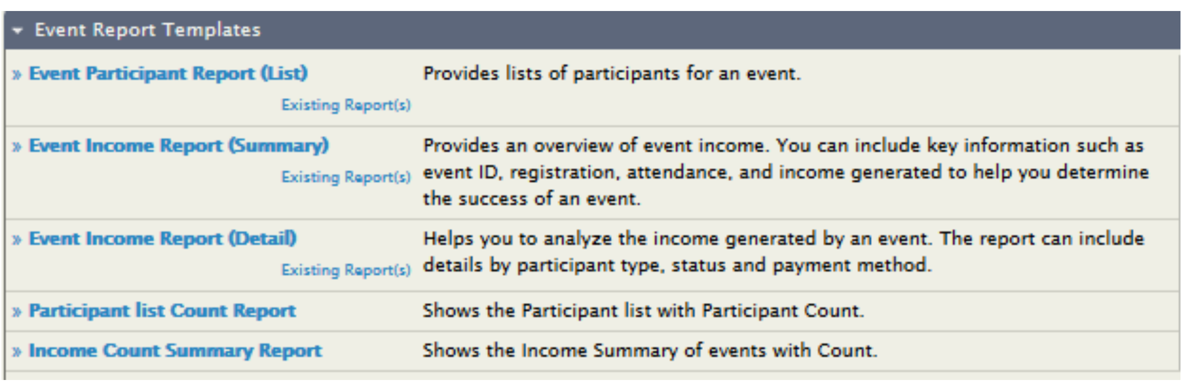
This section explains how to set up CiviReports. It assumes a basic understanding of why you would want to use CiviReport, and describes the workflow for creating a report from a template through to making these reports available for users. It also assumes that the report you require can be achieved using the report templates supplied with CiviCRM.

If the report template you need does not exist you (or your developer) should refer to the Custom Reports chapter in the Extensions section of the Developer Guide for information about creating new templates.

## Report templates

Report templates are general reports that can be further customised to create specific report instances. These report instances can then be made available to users.

The **Create new report from templates** page lists all available report templates and is found in the **Administer > CiviReport** menu. The templates are grouped by component, and each has a brief description of its intended scenario. If there are already report instances for a given template, you'll see a link to view **Existing Reports**.




Clicking on the report template name will bring up a screen where the report can be configured.

There are two steps to configuring a report:

1. Select your **report criteria**: decide what information will be displayed in the report.
2. Define the **report settings**: choose a title, set permissions and add it to a menu.

## Select report criteria



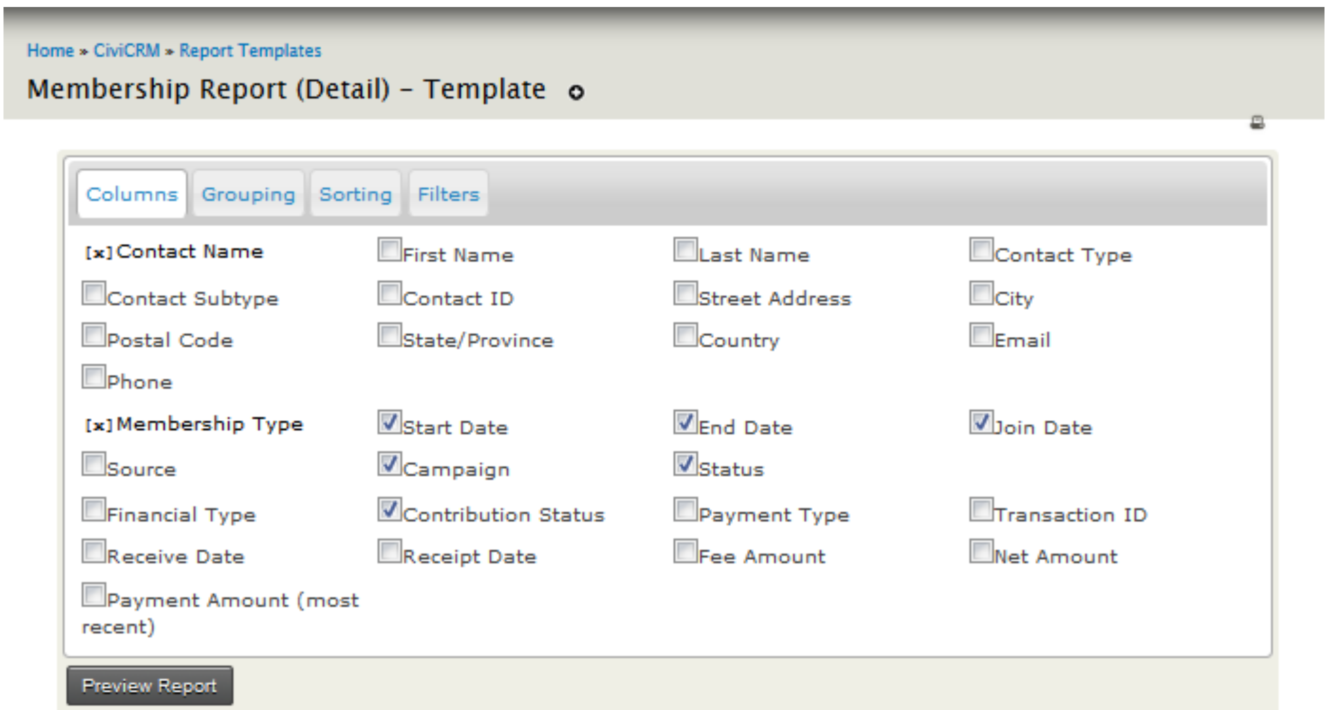
When you create a new report you will be presented with two or more tabs that will let you define the information the will be displayed in your report. The tabs available will depend on the template you have selected with the most common being:

- **Columns** (all reports)
- **Grouping** (summary reports)
- **Sorting** (detail reports)
- **Filters**(all reports)

The options available for these criteria change from report to report. General principles for the different types of report criteria are outlined below.

## Columns

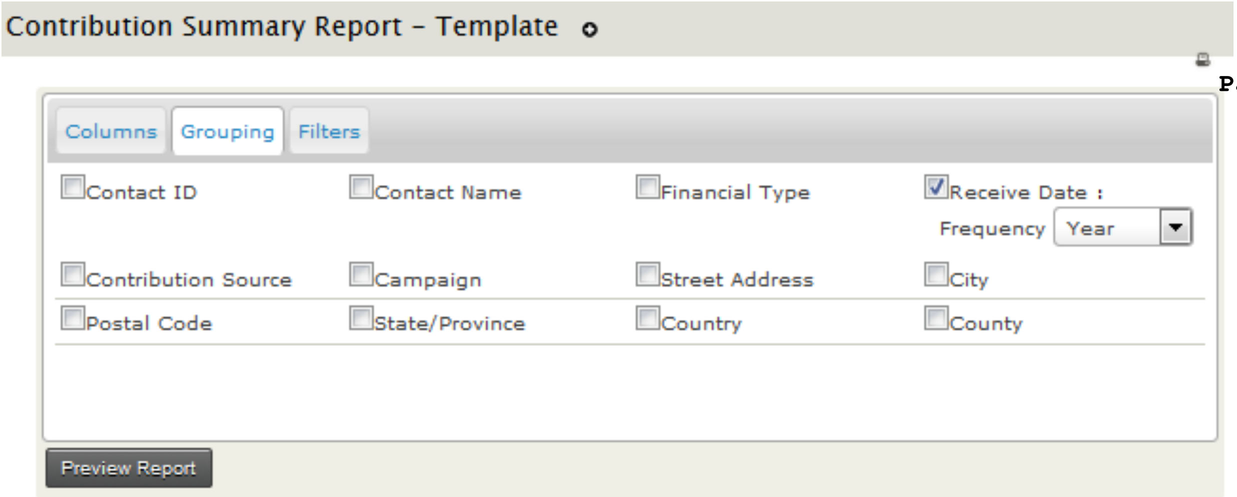
These check boxes allow you to select the data to be displayed for each record in your report. In most reports, at least one display column is *required* and cannot be unselected. For example in the membership detail report **Contact Name** and **Membership Type** are required fileds

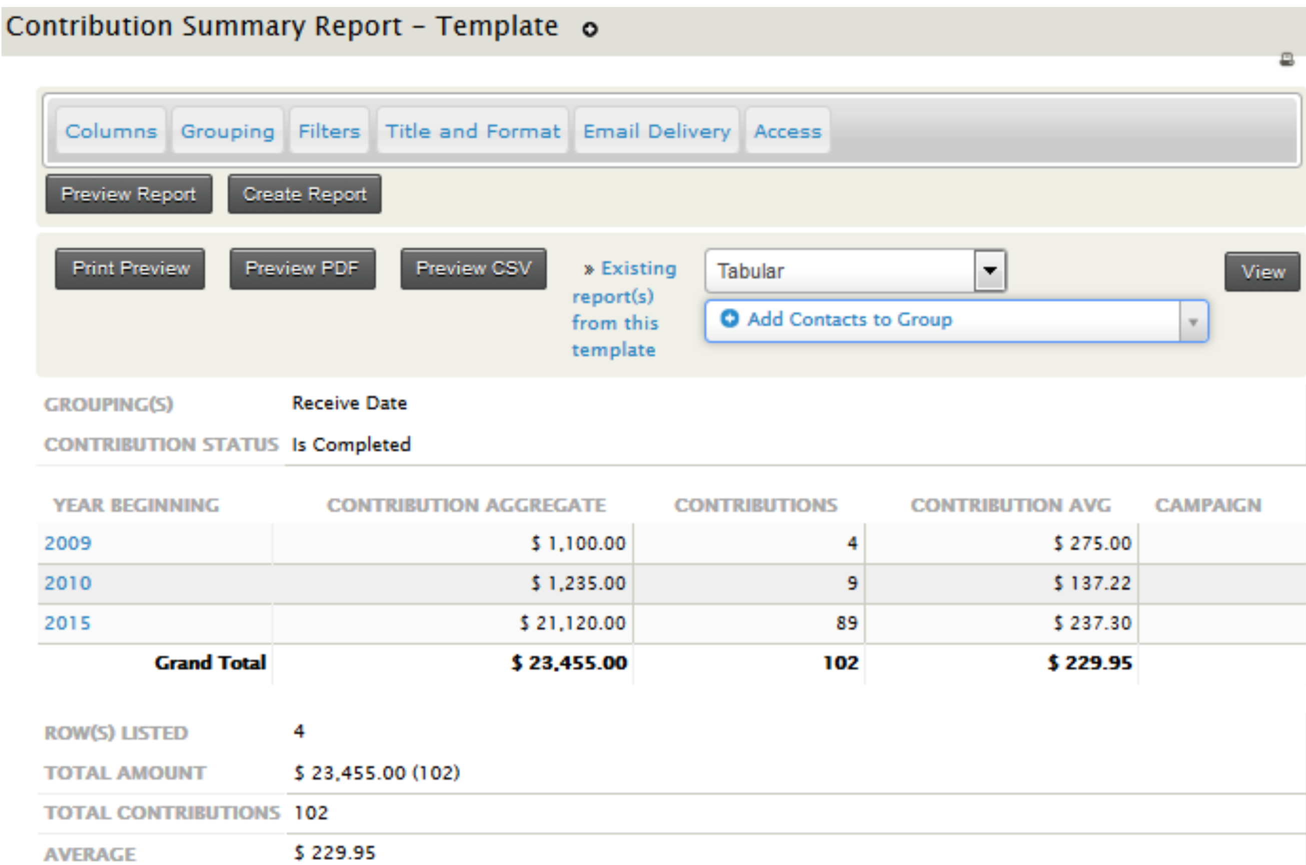



## Grouping

This is not available in all reports, but it is useful when creating a report which summarises data, rather than displaying each individual row, and for reports that compare different types of data.

For example you can choose to compare donations per year.



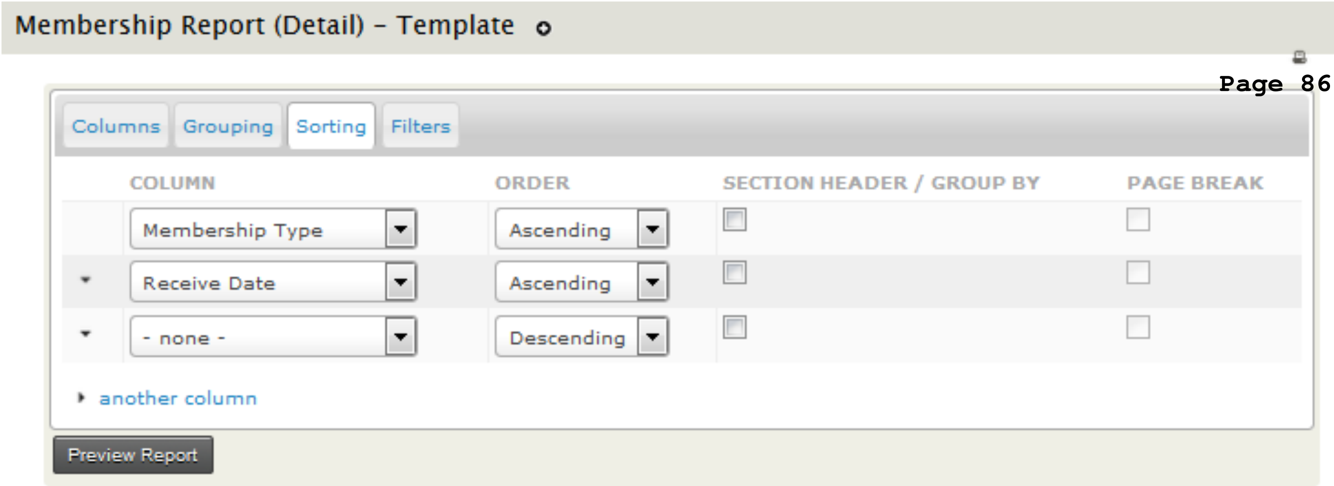



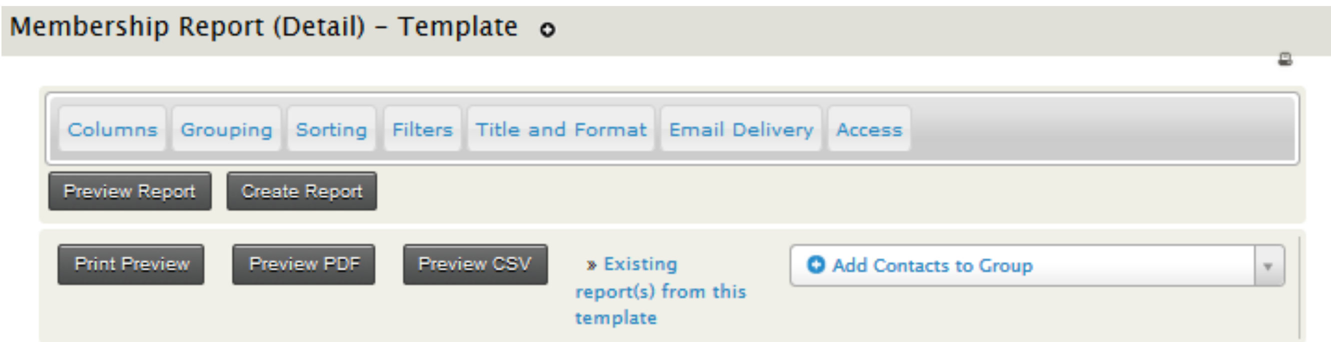

You can specify more than one grouping criteria. When you do this, results will be nested based on both groupings. Not all combinations of groupings will make sense for your data. You may need to spend time experimenting with Group By Columns to become familiar with this functionality.

Note that some Groups By Columns interact with Display Columns and can't be selected at the same time. The system will warn you if you try to make an invalid selection.

## Sorting

This is not available in all reports, but can be useful in "detail" reports as shown below.




| CONTACT NAME | MEMBERSHIP TYPE | START DATE | END DATE | JOIN DATE | STATUS | CONTRIBUTION STATUS |
|---|---|---|---|---|---|---|
| Ivanov, Justina | General | March 15th, 2015 | March 14th, 2017 | March 15th, 2015 | New | Completed |
| Terry, Alexia | General | March 19th, 2015 | March 18th, 2017 | March 19th, 2015 | New | Completed |
| Łachowski, Tanya | Student | March 20th, 2015 | March 19th, 2016 | March 20th, 2015 | New | Completed |
| Wattson-Wagner, Margaret | Student | March 18th, 2015 | March 17th, 2016 | March 18th, 2015 | New | Completed |
| McReynolds, Carlos | Student | March 16th, 2015 | March 15th, 2016 | March 16th, 2015 | New | Completed |
| Parker, Rolando | Lifetime | March 21st, 2015 | | March 21st, 2015 | New | Completed |

## Filters

Filters are the main way to specify the records that you want to include in the report. For example, running the Membership Detail report without choosing any filters will show you all membership records. You could then filter the report to show all members of a specific membership type who joined last year. Most filter are self-explanatory; the date range filter is explained below.

### The Date Range Filter

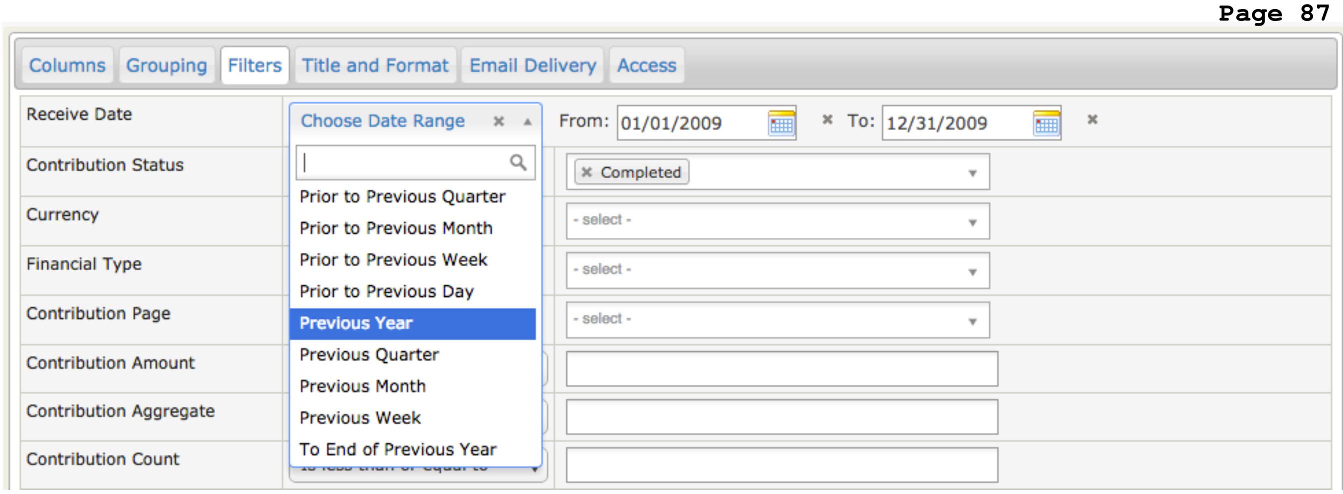
Most reports will have a date range filter. This can be configured in two ways:



- by using an absolute date range, e.g. "1st Jan 2010" to "31 July 2010"

- by using a relative date range, e.g. "Previous Year".



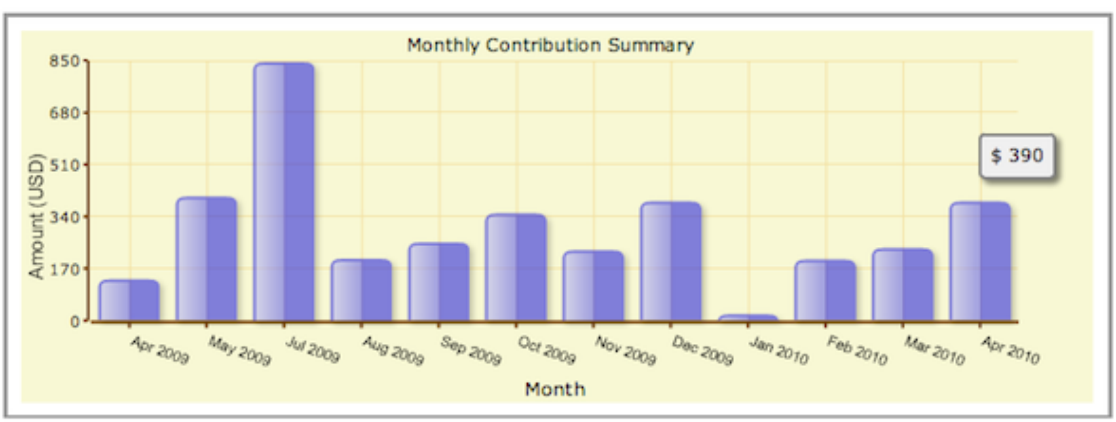



Relative date ranges are very useful for reports that you want to run on an ongoing basis for example:

- **This year** gives all records from the start of the current year.
- **Previous quarter** gives all records from the previous quarter.
- **Last 12 months** gives all records between one year earlier than today's date, and today (really useful!).

The "Last ..." ranges are particularly useful when used in combination with Group By Columns. Combining Ending Year with Group By Month gives a report that summarises data by month for the previous 12 months.

The report below shows the total amount of contributions received in the past 12 months, as well as each month's total.




Once you have selected your report criteria, click **Preview Report**. (You will see that the tabs that define the report settings are now visible.) If the information displayed isn't exactly what you wanted, you can select the appropriate tab to modify your criteria. You may need to make several modifications before you achieve the report you want.

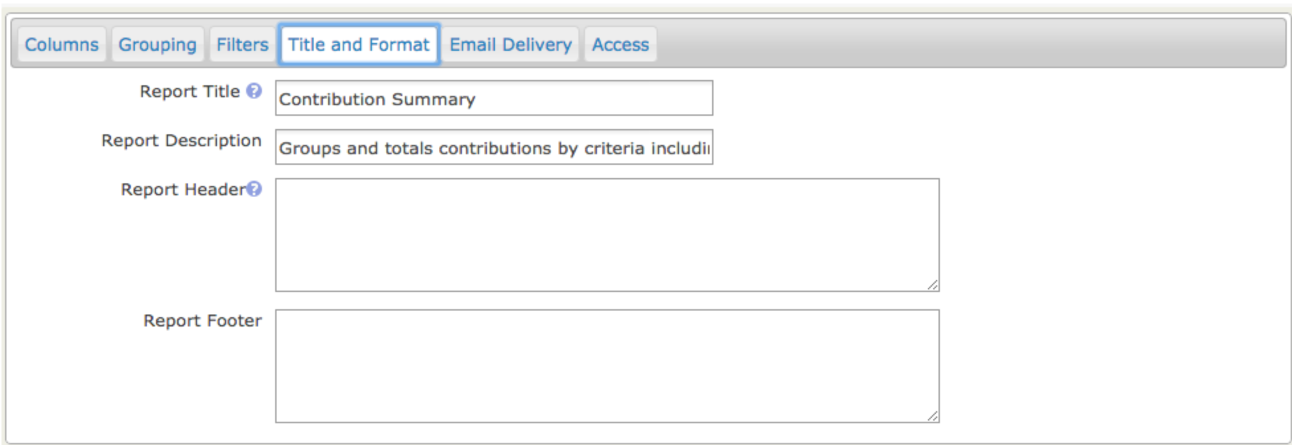
## Define Report settings



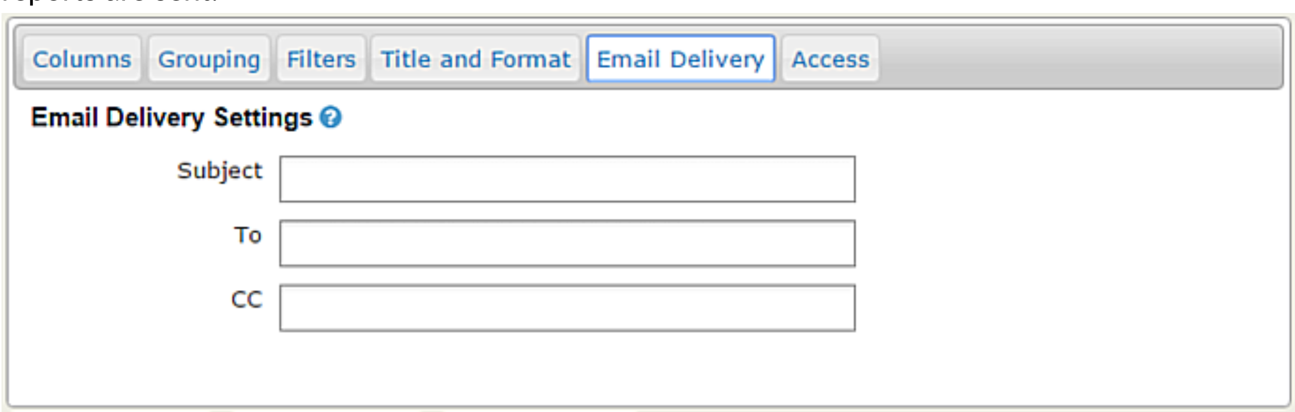
Once you are happy with the report criteria you have entered into the template, you need to save this criteria as a new report so that it can be run again. To do this:



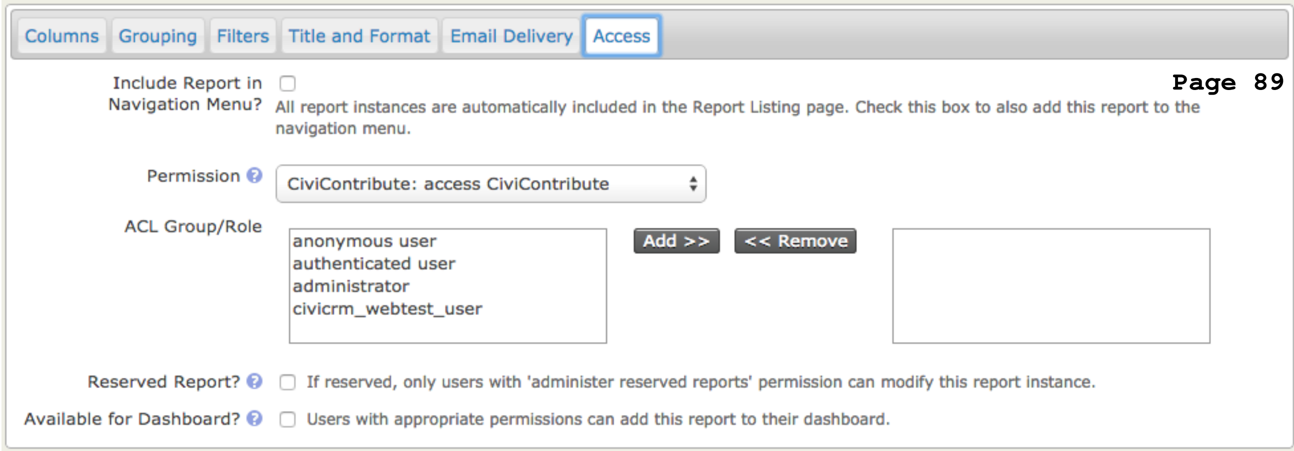
1. On the **Title and Format** tab give your report a title and description that will help other people understand its usage, for example, "Student members joined so far this year". A standard header and footer is included with each report and is displayed at the beginning and end of any PDF or downloaded versions of the report. These are written in HTML. If you want to display the actual report title replace "CiviCRM Report"in the < title> tag. You can include a logo be adding an tag. You can also modify the look and feel of the printed report by including a custom CSS file (instead of print.css).




2. The **Email Delivery** tab contains the fields that will let you have report emailed to yourself or someone else on a regular basis. Fill in the Subject, To and CC fields in the Email Delivery Settings. You can enter one or more email addresses in the To and CC fields; multiple email addresses should be separated by commas. See the information below about *Email settings* to ensure your reports are sent.




3. On the **Access** tab, you can set if and where the report will appear in the menu. All reports will be included in **Report > Report listing**. Check **Include Report in Navigation Menu?** and specify the parent menu to include the report in another menu. For example, you might want to add an Event report to the Event menu.




On the **Access** tab, you can also set up permissions to view or edit reports on a report-by-report basis. This allows you to simplify the user interface for junior users and set sensitive reports to be accessible only to certain users. For example, you might select "access CiviContribute" for contribution reports so that only the people that can see contribution data can access the report.

Alternatively you can limit access to a report to (a) particular ACL role(s). Refer to the *Permissions and Access Control* in the *Initial Set Up* chapter.

A **Reserved Report** can only be altered by someone with the **Administer Reserved Reports** permission.

Checking the box **Available for Dashboard?** lets users with appropriate permissions to add this report to their dashboard (this is done by clicking the **Configure Your Dashboard** button on the individual's dashboard).

Click **Create Report**. The report will now appear in **Reports > All Reports** as well as in any navigation menu you defined on the Access tab.

### Email settings

As well as entering the email delivery settings described above, the **Mail Reports (mail_report)** scheduled job must be enabled to send report emails. Alternatively a cron job can be scheduled to run this specific task apart from other scheduled jobs. The specific report instance and, optionally, format are specified as part of the scheduled job configuration. Refer to the *Scheduled Jobs* chapter for more information.

## CiviReport Permissions

There are four permission specifically associated with reports:

- **CiviReport: access CiviReport** - user can view the CiviReport menu, but can only view reports set with the access CiviReport permission
- **CiviReport: access Report Criteria** - user can change report search criteria
- **CiviReport: administer reserved reports** - user can edit all reserved reports
- **CiviReport: administer reports** - user can manage report templates

# Everyday Tasks

This chapter assumes that CiviReport is already configured and you are a user wanting to access reports that have been configured for you. If you want to learn more about how to set up and configure reports, read the section on setting up CiviReport.

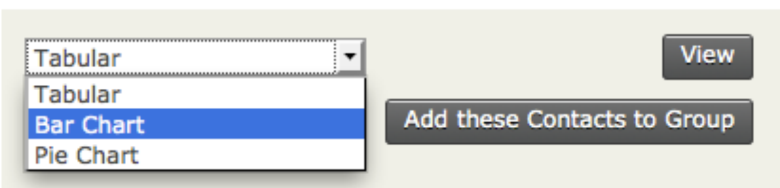
## Viewing reports

To view a report:

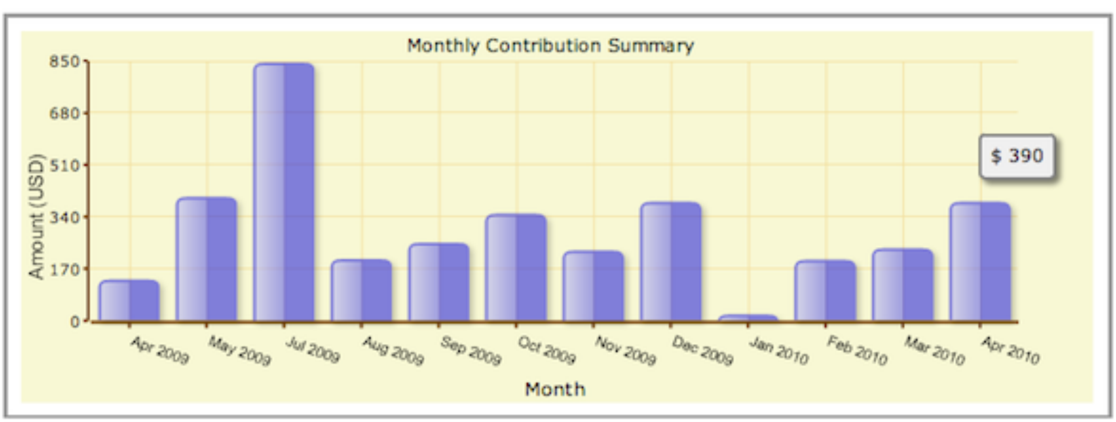
1. Go to **Reports**.
2. Select the relevant report type.
3. Click on the name of the report you wish to view.

Reports can also be configured to be directly accessible from navigation menus. For example, an event report can be configured to appear in the **Events** menu.

When you open a report it will appear on screen as a table. Some reports can also be viewed as a bar or pie chart. When this is the case, a dropdown menu will allow you to select the format you want.




The appropriate report should then be displayed.



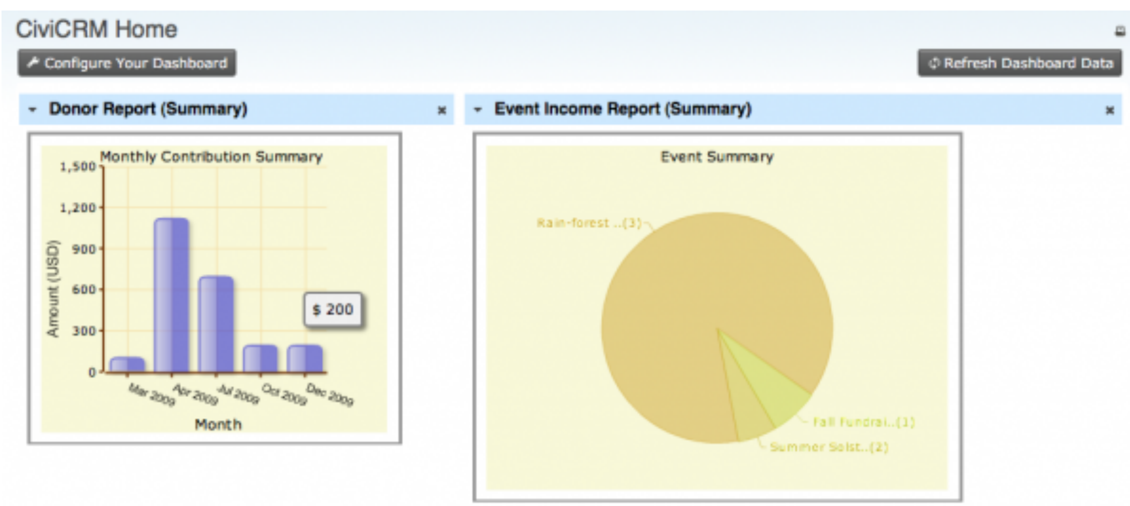

As well as viewing reports on screen you can create a PDF version of either tables or graphs, suitable for printing or emailing.


If you want to perform further calculations on your report data, you can output the data as comma separated variable (CSV) for import into a spreadsheet by clicking **Export to CSV**.

If you have the appropriate permissions, you will be able to adjust the report criteria and settings when you view the report. Read the section configuring reports for detailed information about how to do this.

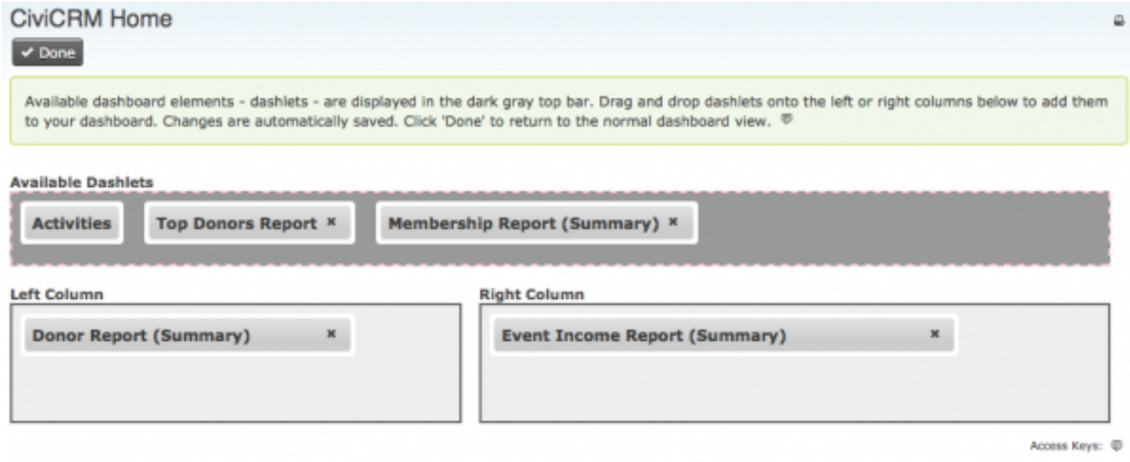
## Reports on your dashboard

Reports can be configured to appear on your dashboard (the first page you see when you log in to CiviCRM). You can configure this yourself, although not all reports may be available to put on your dashboard.



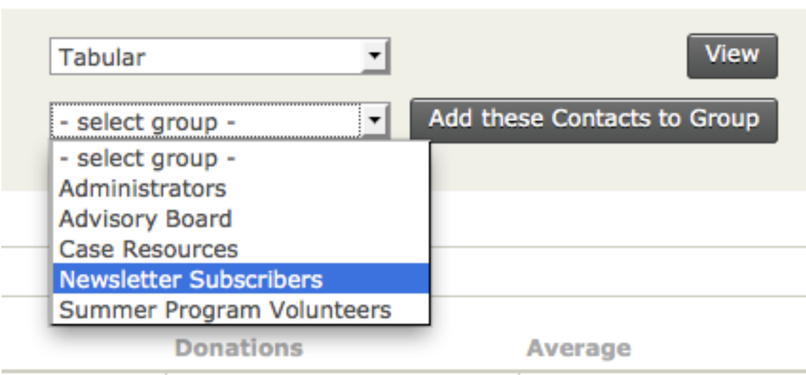

To display specific reports on your dashboard:

1. From your dashboard, click on **Configure Your Dashboard**.
2. Select a report from the list of available reports.
3. Drag the report onto your dashboard.




## Adding report results to a group

Sometimes it is useful to add contacts returned in a report to a group. This functionality isn't available in all reports but where it is, you can choose the group you want to add the contacts to from the dropdown menu as shown below.



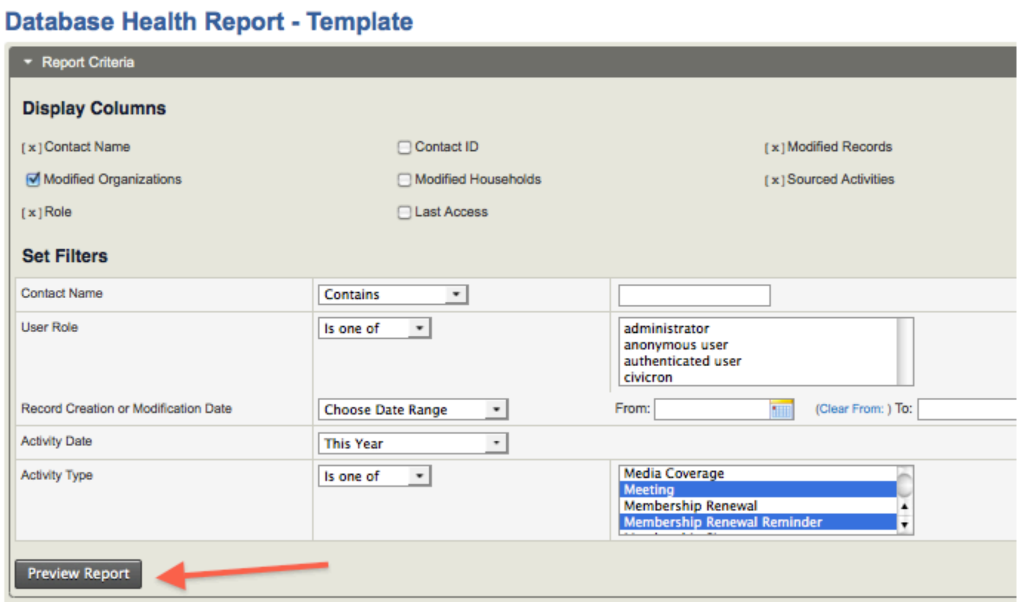
# Add a Dashlet to Your Homepage

Is there a report you use (or want to use) often? Make your PowerBase homepage *way* more useful by adding the reports that you need to see right to your PB homepage, also known as the dashboard.

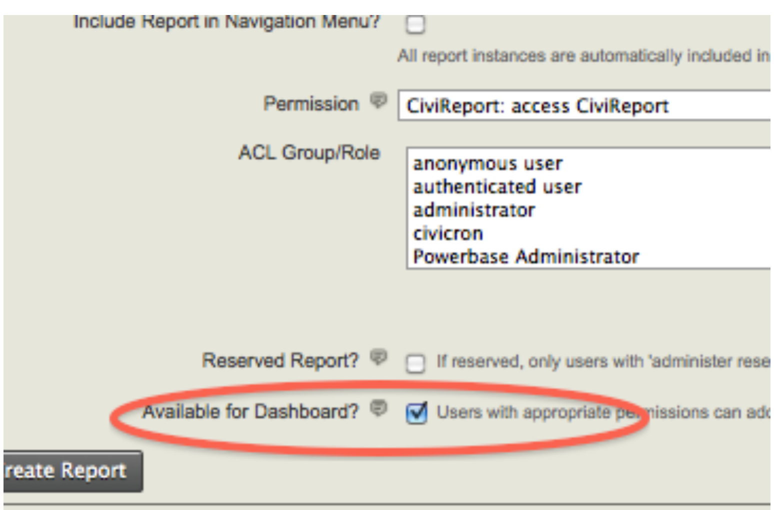
If there is data you want to have right at your fingertips each time you log in to PowerBase, create a report and enable it as a dashlet.

Here are the steps to create a report that can be used as dashlet:

- Click **Reports** > **Create Reports from Templates**
- Select the report that you want to see on your dashboard.
- Choose the criteria you want to look at in your dashlet.*
- Click **Preview Report**.




- Once there, click **Create Report**.
- At the bottom of the Create Report section, there's a checkbox that says "**Available for Dashboard?**"



# Add a Dashlet to Your Homepage

- Click it, and users with permission to see that information (i.e. if it's about events, users who have permissions to see event-related stuff) will be able to add that dashlet.
- Once you've enabled the dashlet, click **Home**.
- Click **Configure Dashboard**. Drag the dashlet from the "Available Dashlets" box to the column where you'd like it to appear.


Once you can view the report on your dashboard, you will have the latest info at your fingertips. If you suspect any data isn't up to date, just click **Refresh Dashboard Data** at the top right of the dashboard.

*Don't hesitate to reach out to support if you need help with creating reports at support@progressivetech.org or 612-724-2600 x 114

Read more about the dashboard and dashlets in the manual: http://book.civicrm.org/user/current/the-user-interface/menu-dashboard-and-dashlets/