



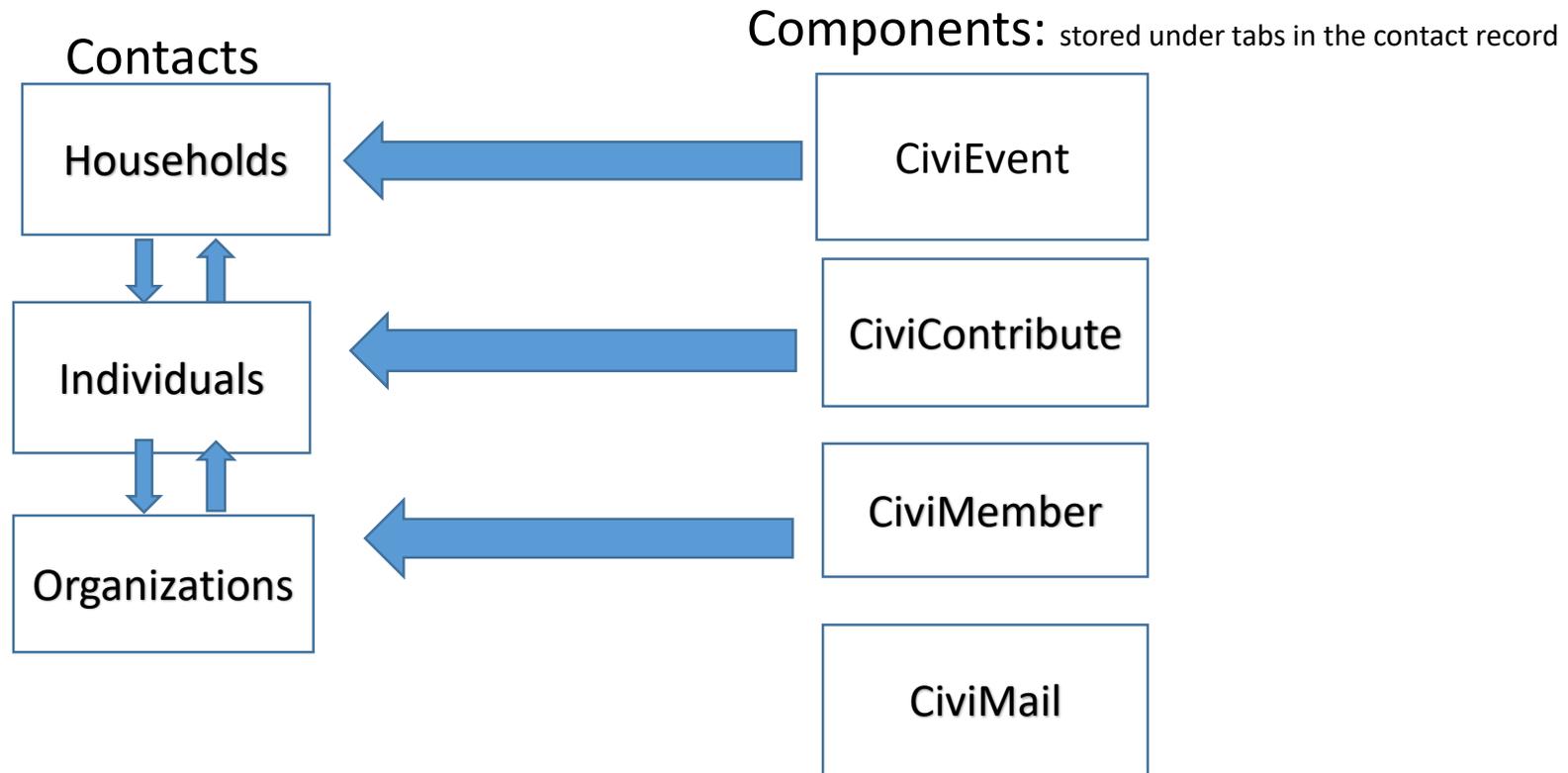
*cloud solutions for nonprofit organizations*

## ARCS Training in CIVICRM

1. Navigation menu
2. Contact types and sub-types
3. Adding new contacts
4. Managing relationships between contacts
5. Conducting basic and advanced searches
6. Segmenting data: groups & tags
7. Recording Scholar Awards (grants)
8. Creating an Event
9. Finding attendees
10. Managing contribution pages
11. Viewing contributions



# Data in CiviCRM is organized in tables



# Contacts



- Contacts types
    - Individual
    - Household
    - Organization
  - Can define sub-types of a contact type
  - “scholar” is a sub-type of Individual
- Contact information is stored under tabs in contact record
    - Summary
    - Relationships
    - Activities
    - Groups
    - Tags
    - Events

# Relationships



- Links two contacts
- Can customize relationship types
- Can disable relationships and keep historical tracking
- Some relationships are automatically created by the CRM based on data (current employer field)

# Search tools



- Quick search box
- Search pages for contacts
  - Find contacts (basic search)
  - Advanced search
  - Full-text search
  - Search builder
- Search pages for Components : Results displayed show *component* records rather than *contact* records

# Groups



- A flexible way to segment contacts in your database
  - Used for grouping people within an entity that needs to be treated as a cohesive unit to facilitate specific tasks
  - Can be structured hierarchically
  - Can be used as Mailing lists in CiviMail
- Regular (Static) groups:
  - Contacts are added manually or a contact ‘subscribes’ through an on-line web page
  - Maintain historical tracking of the added/removed status & date
  - Examples: Board members, Chapter presidents, Advisory council
- Smart (Dynamic) groups
  - Results of a saved search on particular criteria
  - Contacts in the group update automatically when changes are made to the criteria

# Tags: descriptive categories



## Benefits:

- Easy to set up and use
- Easy to search
- Easy to combine with other properties to create Smart groups
- Can be structured hierarchically
- Can be used for contacts, activities, cases, etc.

## Limitations:

- History of the tag is not recorded
- Can not create tags for use with specific contact types
- When you export tags all tags assigned to a record are exported in a single "cell" as a list

# Recording Scholar Awards (grants)

- Workflow
  - Amount requested
  - Date application was received
  - How much was granted
  - Date funds were transferred
  - Grant report: Due? Received?
- Grant Types
- Grant Statuses
- Application Forms and Eligibility Criteria – Custom fields

# Manage Events & Event Dashboard

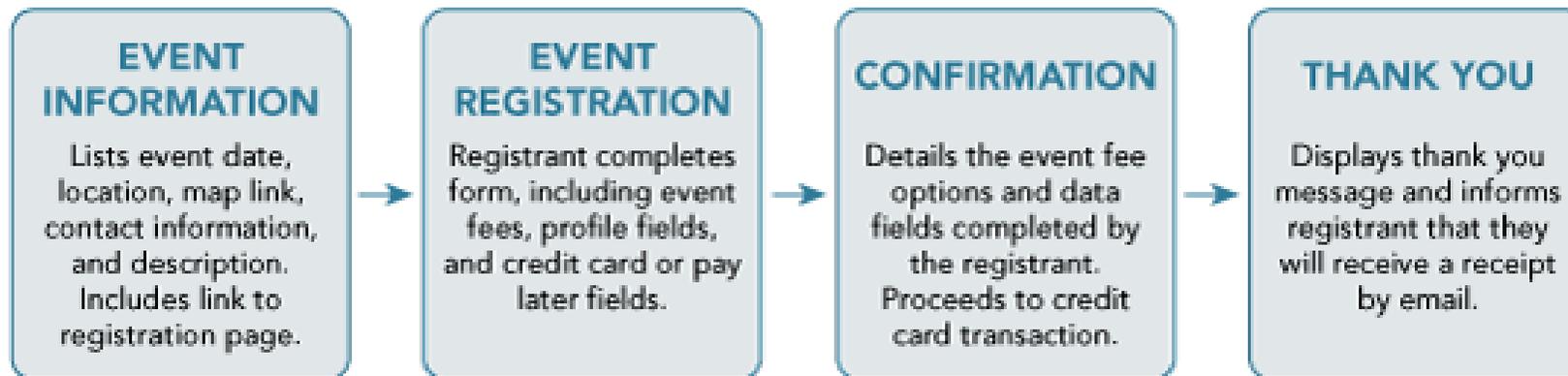
## Manage Events:

- Lists current and upcoming events
- Search for past events and event types
- Access configuration, information and registration page links, participant registration

## Dashboard:

- Summary of current events and recent registrations

# Event Pages



# Event Information Page



- Assign Event Type
- Assign Participant Role
- Participant List
- Start/End Date
- Maximum number of Participants
- Waitlist option
- Add Location

# Event fees

- Regular fees
  - Single list of options
  - Can implement date-based discounts (early bird)
- Price sets
  - Created first and then added into fees section
  - Allows for multiple sets of fees & options and an accurate count of participants
  - Can set max participant per fee
  - Fees may be presented in various formats

# Online Registration Page

- Registration Start and End Dates
- Register multiple participants
- Multiple registrations from the same email address (Careful with this option)
- Introductory and footer text
- Profiles
- Confirmation Page text
- Thank You Page text
- Confirmation Email

# Managing Event attendees

- Use the Event Dashboard to track attendees
- Find Participants (component search)

# Managing contribution pages and viewing contributions

- Contributions > Manage contributions
  - Where all the on-line contribution pages are stored
  - Can edit the configuration of a page
  - Can view the links
  - View on-line contributions
- Contributions tab in the contact record
  - View contributions
  - Manually Add contributions
- Find Contributions (component search)