



cloud solutions for nonprofit organizations

ARCS Training Session

1. Awards: Workflow and Managing
2. Exporting
3. Searching and Reports
4. CiviMail: Groups
5. Price Sets

Awards (Grants)

- Workflow for manually entering awards (New Award)
 - Applicant Name
 - Award Status (Submitted, Current/Active, Complete, etc)
 - Award Type (Named or Chapter)
 - Amount Awarded in the Fiscal Year
 - Fiscal Year Start Date
 - Award Finalized
 - Rationale
 - Notes
 - Scholar Additional Information (custom fields)

Awards: Managing

- Award Dashboard
- Find Awards
 - Update Awards
- Using Advanced Search to find contact info for scholars
- Award Reports: Award Detail template
- Relationships: add relationship between scholar and sponsor

Exercises

Exporting Data

- Share data with external applications by providing a copy of the data in Comma Separated Value (CSV) format
- Can be viewed and edited in spreadsheet applications, imported into other database applications or merged with Word processing documents
- Benefit: can select the exact fields you want to export and save them for future exports (field mapping)
- Works best when you don't combine two different contact types
- Can combine a contact type and a component such as Individual and Award

Exercises

Reports vs. Searching

- Reports

- Useful when repeatedly asking the same question
- Used to aggregate data from different components (ie. Membership and Contribution Report)
- Relative time periods ("last quarter")
- Different ways to display data
- Allows for analyzing data

- Searching

- Actions menu is available after a search
- Raw data

Exercises

Reports



- Use predefined report templates
 - Criteria
 - Filters: (Relative time periods)
 - Group By (summary reports)
- Can be added to dashboard (dashlet)
- Can be added to navigation menus
- Can be viewed on screen (tables or graph) and exported to PDF or CSV
- Can schedule to be emailed

Report Templates

- Award Report (Detail):
 - Choose columns: scholar name, award status, amount awarded and school
 - Filter: Fiscal year
- Award Report (Statistics):
 - Can view information about a particular school and amount awarded to that school during a specific year

Exercises

Email and Emailing

What's the difference?

Email

- Action dropdown menu: "Send email to contacts"
- Maximum 50 recipients
- Use message templates
- No statistics

Emailing

- CiviMail: CiviCRM's mass mailer
- Used for Newsletters, Event announcements, etc.
- No limit to the number of recipients
- Use message templates

More on CiviMail



- Tool for handling mass email campaigns
- Recipients can manage subscription (subscribe and unsubscribe)
- Groups can be designated as Mailing Lists
- Manage bounced emails – Email On Hold
- Report data on who is clicking on what. Statistics are available on opens and click-throughs
- Customizable Header and Footer (mandatory unsubscribe link and domain name address)

How to use CiviMail



- Configure groups as mailing lists
- Create templates using the HTML Editor
- Personalize with tokens
- Customize headers and footers
- Create an emailing
- Send a test mailing
- Schedule your emailing or send immediately

Exercises

Price sets



- Allows you to break fees into different line items and set an unique fee for each line item

- Used for events/memberships/contributions
- Can define a different financial type/line item
- Can set a max participants and participant count / line item
- Active Date/ Expiration Date/line item
- Can combine different field types to create any fee structure
 - Text/Numeric Quantity
 - Select
 - Radio
 - Checkbox

Price Set



Conference Fee

Registration Fees

Pre-Conference ☒ Using Social Networking Tools for Organizing - \$ 25.00

Trainings ☒ Getting the Most out of your Blog - \$ 25.00

Meals (per meal

cost) - \$ 10.00 Enter the number of meals you would like to purchase. Cost is \$10 per meal.

Lodging (per

night) - \$ 100.00 Enter number of nights you will need lodging. Cost is \$100 per night.

Total Fee(s) \$ 285.00

Exercises