

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 acquaint 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. Campaign Components: review of the steps taken in a typical organizing campaign
3. PowerBase Components: aligning our organizing steps with the components in the PowerBase database
4. Researching your base: using PowerBase's various search interfaces to find the data you need in your database
5. 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.
6. Events: introduction to creating events and using them to track attendance
7. Event Turnout Workflow: use PowerBase to manage your first, second, and third outreach calls, keep track of who and how people respond, and report on attendances in relationship to outreach calls.
8. Reports: Get a quick birds-eye view of who your yes's are and who needs more contact.

Walk List: Winston Salem

<i>Name</i>	<i>Address</i>	<i>Phone</i>	<i>Email</i>	<i>Notes</i>
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	emelias.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 Salem, 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	
13. Imelda Cudney	2510 Wallingford Rd, Winston Salem, NC 27101	123-555-2153	imelda.cudney@example.net	
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	norbert.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	2480 Wallingford Rd, Winston Salem, NC 27101	123-555-1754	micah.pasley@example.net	
21. Jose Anderson	2448 Kingsgate Dr, Winston Salem, NC 27101	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

<i>Name</i>	<i>Address</i>	<i>Phone</i>	<i>Email</i>	<i>Notes</i>
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	

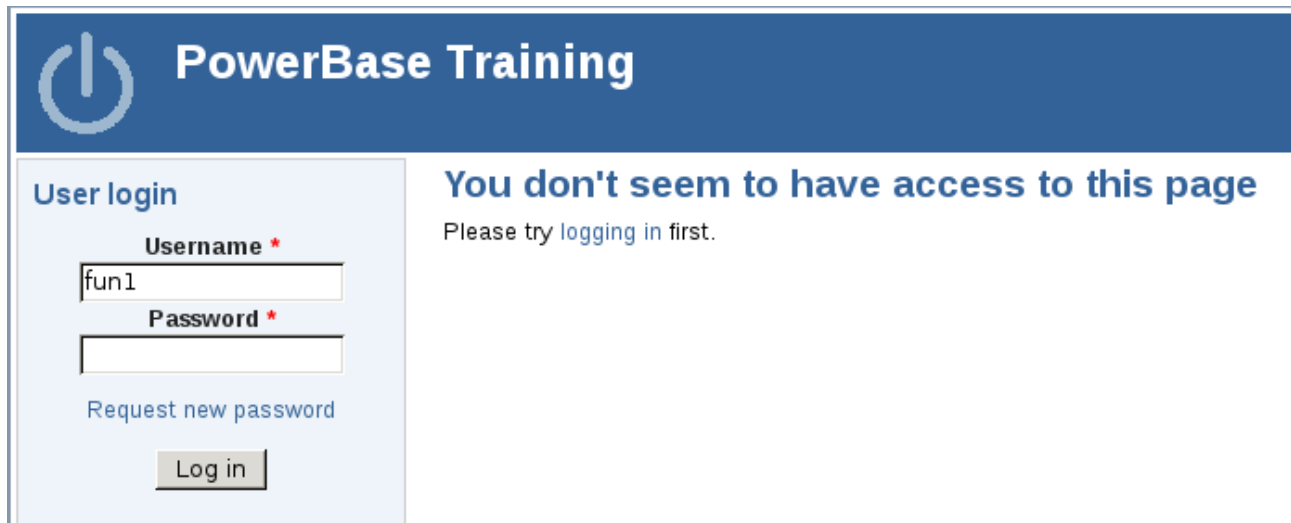
Login and Change Password

This tip sheet covers your first login to your database.

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

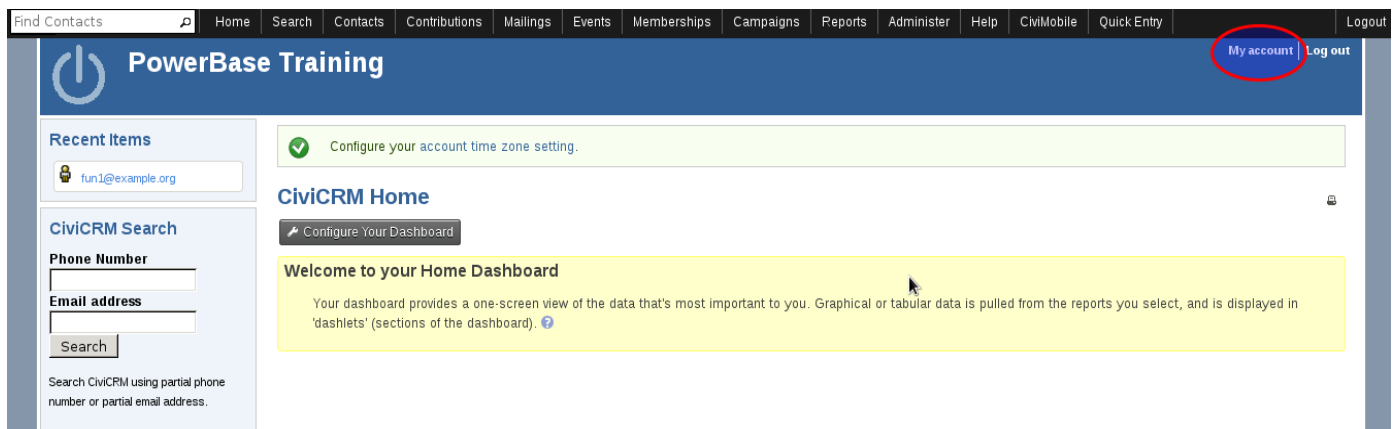
Tip: Be sure never to share a login with another person. Sharing logins makes it harder to secure your database if a password is forgotten or compromised.

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/>.

The image shows the PowerBase Training login interface. At the top is a blue header with a power button icon and the text "PowerBase Training". Below this, on the left, is a "User login" box containing fields for "Username *" (with "fun1" entered) and "Password *", a "Request new password" link, and a "Log in" button. To the right of the login box, a message states "You don't seem to have access to this page" followed by "Please try logging in first."

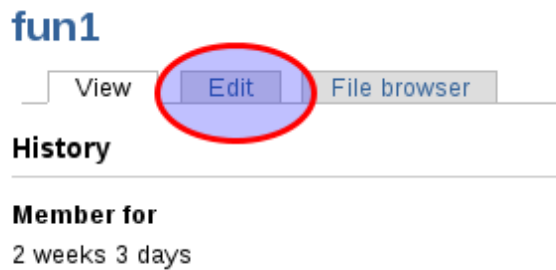
Enter your username and password in the form at the top left.

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

The image shows the PowerBase Training dashboard after a successful login. At the top is a navigation bar with links: Find Contacts, Home, Search, Contacts, Contributions, Mailings, Events, Memberships, Campaigns, Reports, Administer, Help, CiviMobile, Quick Entry, and Logout. Below this is a blue header with the PowerBase Training logo and a "My account" link circled in red. The main content area includes a "Recent Items" section with a user icon and "fun1@example.org", a "CiviCRM Search" section with fields for "Phone Number" and "Email address" and a "Search" button, and a "Welcome to your Home Dashboard" section with a "Configure Your Dashboard" button. A green notification bar at the top of the main content area says "Configure your account time zone setting."

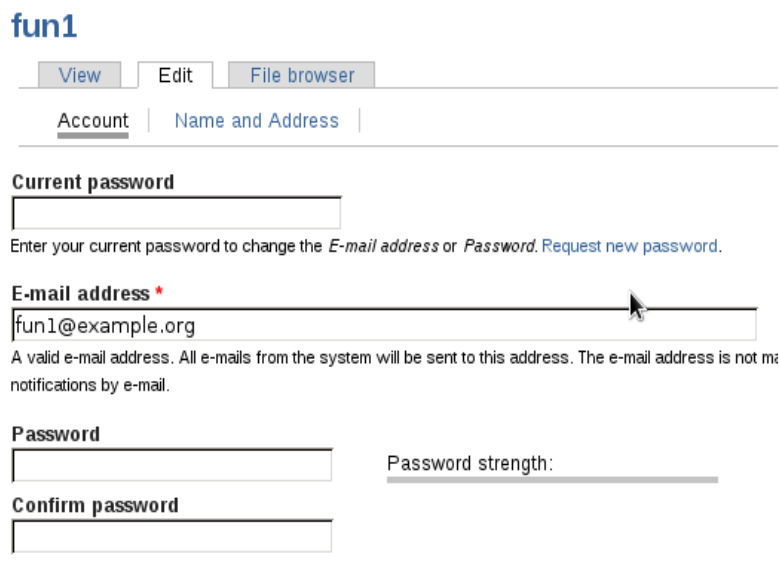
Login and Change Password

Next, click the Edit link...



The screenshot shows the user profile for 'fun1'. At the top, there are three buttons: 'View', 'Edit', and 'File browser'. The 'Edit' button is highlighted with a red circle. Below the buttons is a 'History' section. Further down, it says 'Member for 2 weeks 3 days'.

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



The screenshot shows the 'Edit' page for 'fun1'. At the top, there are three buttons: 'View', 'Edit', and 'File browser'. Below the buttons is a tabbed interface with 'Account' and 'Name and Address' tabs. The 'Account' tab is selected. Under the 'Account' tab, there is a 'Current password' field. Below it, a message says: 'Enter your current password to change the E-mail address or Password. [Request new password.](#)'. Below that is an 'E-mail address' field with a red asterisk, containing 'fun1@example.org'. Below it, a message says: 'A valid e-mail address. All e-mails from the system will be sent to this address. The e-mail address is not used for notifications by e-mail.' Below that are 'Password' and 'Confirm password' fields. To the right of the 'Password' field is a 'Password strength' indicator.

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

Create An Individual Contact

Management

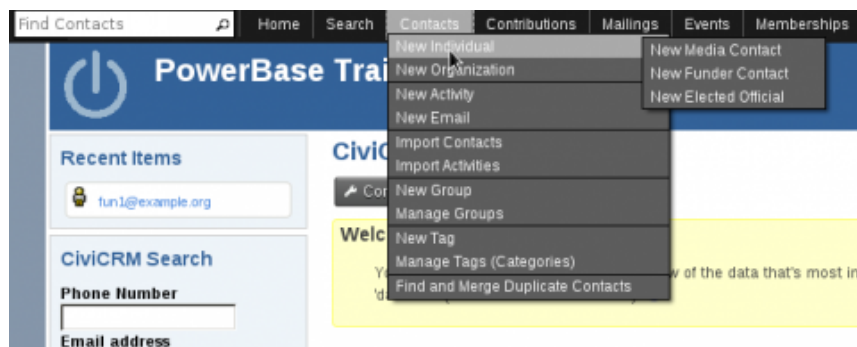
[View \(/node/1088\)](/node/1088)
[Edit \(/node/1088/edit\)](/node/1088/edit)
[Track \(/node/1088/track\)](/node/1088/track)
[Convert \(/node/1088/convert\)](/node/1088/convert)

Administration
(/admin)

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.



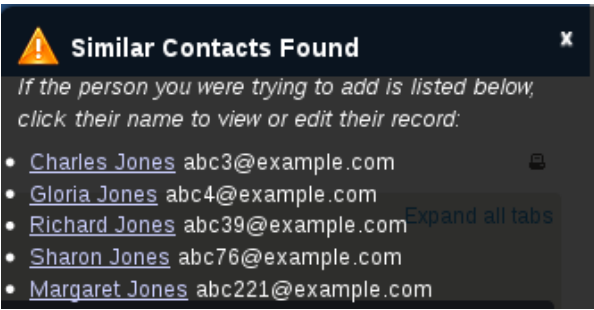
You have the option of creating a Media, Funder or Elected official contact. However, if you simply click the New Individual link you will create a generic new individual, which is the most common type of individual contact you will be using.

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

 A screenshot of the 'Contact Details' form in the PowerBase Trainers application. The form is divided into several sections. The top section includes fields for 'First Name', 'Middle Name', 'Last Name', and 'Suffix'. Below this are 'Current Employer', 'Job Title', 'Nickname', and 'Contact Type' (a dropdown menu). The 'Email' section has an 'add' button and a 'Home' dropdown. The 'Phone' section includes 'Phone', 'Phone Location' (with a 'Home' dropdown), and 'Phone Type' (a dropdown). There are also links to 'Add another Phone number' and 'Add another website'. The 'Website' section has a 'Website' field and a 'Website Type' dropdown. The 'Source' section includes 'Source' and 'External id' fields. At the bottom, there is a 'Browse/Upload Image' button and a 'Check for Matching Contact(s)' button.

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.



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

268 reads

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Adding an activity to a contact

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

Home > CivCRM > View Contact

Alberta Smith

Actions ▾ Edit Delete Contact Previous Next

Summary Contributions o Pledges o Memberships o **Activities o** Events o Relationships o Groups o Notes o Tags o Change Log o Summary Fields o

Voter Info 1 Activities

Employer		Tags	
Job Title		Contact Type	Individual
Nickname		CivCRM ID	1004
Source			
Home Email	abc1001@example.com	Home Phone	330-555-2234
Website			

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

Actions ▾ Edit Delete Contact Previous Next

Summary Contributions o Pledges o Memberships o **Activities o** Events o Relationships o Groups o Notes o Tags o Change Log o Summary Fields o

Voter Info 1

new activity
new activity
Send an Email
Meeting
Phone Call
Print PDF Letter
Letter of Inquiry
Proposal
Report
Press Release
Volunteer Time
Door Knock
Direct Action
Media Coverage
Real Phonebanking

(\$) - Exclude - select activity type -

First Previous Next Last

	Added By	With	Assigned	Date	Status	Opens/ Clicks
No matches found.						

First Previous Next Last

Lastly, fill out the details and click Save.

New activity: Phone Call

Save Cancel

Added By * fun1@example.org

With Contact * Smith, Alberta

OR - create new contact -

☐ Create a separate activity for each contact.

Assigned To * You can optionally assign this activity to someone. Assigned activities will appear in their Activities listing at CivCRM Home.

Subject * - select -

Campaign * - select -

Engagement Index * - select -

Location * - select -

Date * 11/04/2013 Time * 04:15PM (clear)

Duration * Total time spent on this activity (in minutes).

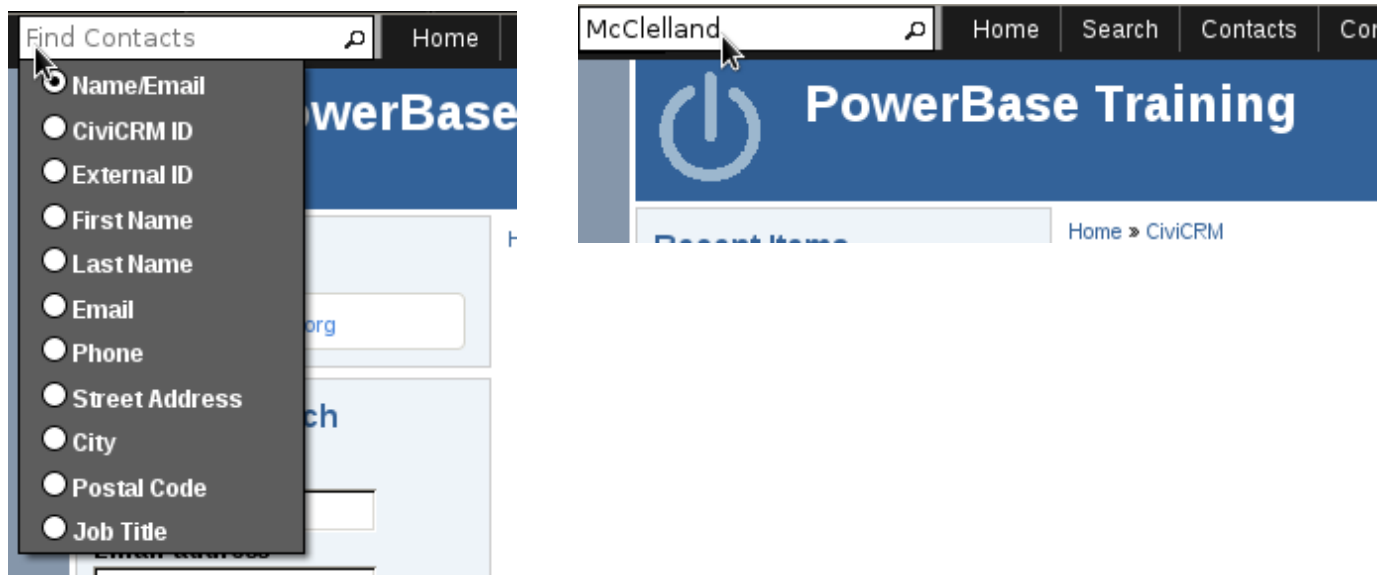
Status * Scheduled

Details

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).

Home » CiviCRM » Find Contacts

Advanced Search

▼ Search Criteria ?

▼ Basic Criteria

Complete OR Partial Name

Complete OR Partial Email

Search View ?

Display Results As ?

Search

Reset Form

Contact Type(s)

Group(s) (search by group type)

Search Operator ?

☐ Search in Trash
(deleted contacts)

Select Tag(s)

All Tags ?

Phone Number

Phone Location

Phone Type

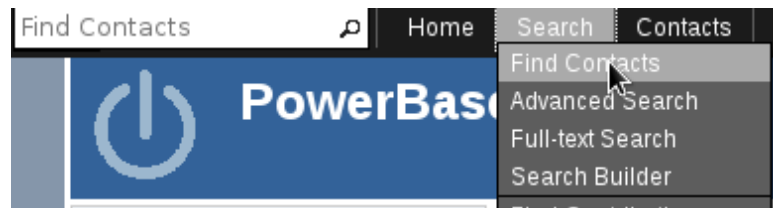
Which is quite confusing until you scroll down to see the message:

i No matches found for:
Name or Email LIKE - 'mcclelland'

Suggestions:

- check your spelling
- try a different spelling or use fewer letters
- if you are searching within a Group or for Tagged contacts, try 'any group' or 'any tag'
- add a [New Individual](#), [Organization](#) or [Household](#)
- make sure you have enough privileges in the access control system

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.



▼ Edit Search Criteria

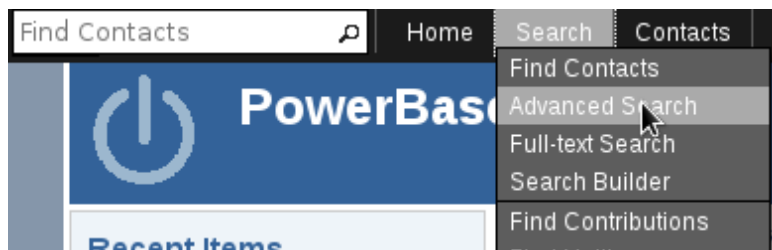
Name or Email

is...

in

with

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.



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:

Advanced Search

The screenshot shows the 'Advanced Search' interface. At the top, there's a 'Search Criteria' section with a dropdown arrow. Below it, the 'Basic Criteria' section contains several input fields: 'Complete OR Partial Name', 'Complete OR Partial Email', 'Contact Type(s)' (a dropdown menu), and 'Group(s) (search by group type)' (a dropdown menu). To the right of these fields are two dropdown menus: 'Search Views' (set to 'Name Address Constituent type') and 'Display Results As' (set to 'Contacts'). Below these is a 'Search Operator' dropdown set to 'AND'. At the bottom right, there's a checkbox for 'Search in Trash (deleted contacts)'.

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.

The screenshot shows the search results page. At the top, there's a header 'Advanced Search' with a dropdown arrow. Below it, there's a section 'Edit Search Criteria' with a dropdown arrow. The main content area shows '26 Contacts' and a search criteria 'Name or Email LIKE - 'smith''. Below this, there's a 'Select Records:' section with two radio buttons: 'All 26 records' (selected) and '0 Selected records only'. To the right of these is a 'Search Builder' link. Below the 'Select Records:' section is a 'Print' button and a dropdown menu for actions. At the bottom, there's a table of results with columns: Name, Home Address, City, State, Zip, Phone (Primary), Constituent Type, and Action. The table contains two rows of results for 'Smith, Alberta' and 'Smith, Alejandra'.

	Name	Home Address	City	State	Zip	Phone (Primary)	Constituent Type	Action
<input type="checkbox"/>	Smith, Alberta	3703 Baymar Dr	Youngstown	OH	44511	330-555-2234	Constituent	View Edit more
<input type="checkbox"/>	Smith, Alejandra	31 Maranatha Ct Apt 306	Youngstown	OH	44505	330-555-1550	Potential Member	View Edit more

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.

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

Advanced Search

► Edit Search Criteria ?

26 Contacts Name or Email LIKE - 'smith'

Select Records: ☒ All 26 records ☐ 0 Selected records only

- actions -

- actions -
- Add Contacts to Event
- Add Contacts to Group
- Add Contacts to Household
- Add Contacts to Organization
- Alter Contact Communication Preferences
- Batch Update via Profile
- Delete Contacts
- Delete Permanently
- Export Contacts
- Mailing Labels
- Map Contacts
- Merge Contacts
- New Smart Group
- Print PDF Letter for Contacts
- Record Activity for Contacts
- Remove Contacts from Group
- Restore Contacts
- Schedule/Send a Mass Mailing
- Send Email to Contacts

A B C D **Q R**

Reset all selections

<input type="checkbox"/>		Name		
<input type="checkbox"/>		Smith, A		stown
<input type="checkbox"/>		Smith, A		stown
<input type="checkbox"/>		Smith, B		stown
<input type="checkbox"/>		Smith, B		stown
<input type="checkbox"/>		Smith, C		stown
<input type="checkbox"/>		Smith, C		stown
<input type="checkbox"/>		Smith, C		stown
<input type="checkbox"/>		Smith, C		stown
<input type="checkbox"/>		Smith, James	352 Grant St	Youngstown
<input type="checkbox"/>		Smith, Kay	835 Westport Dr	Youngstown

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 RESIST! Organizing workshop:

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.

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 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.

Max Number of Participants: 50

Offer a Waitlist? ☒

Waitlist Message: This event is currently full. However you can register now and get added to a waiting list. You will be notified if spaces become available.

☒ Include Map to Event Location?

☒ Public Event?

Include this event in iCalendar feeds?

☒ Is this Event Active?

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.

Configure Event - Fall Fundraiser Dinner

Info and Settings | **Event Location** | Fees (disabled) | Online Registration (disabled) | Tell a Friend (disabled)

Use this form to configure the location and optional contact information for the event. This information will be displayed on the Event Information page. It will also be included in online registration pages and confirmation emails if these features are enabled.

Save **Save and Done** **Cancel**

Choose Location: ☐ Create new location ☒ Use existing location

Use Location: 14S El Camino Way E :: Collinsville :: Connect

Address

Street Address: 14S El Camino Way E

Street number, street name, apartment/unit/suite - OR P.O. box

You can also list phone numbers and email addresses on the event information page if you want to give registrants a way to contact event organizers directly. If the event is being held off-site

from your organization's primary location, you may also want to provide contact information for the meeting location.

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

Event Fees

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

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

Questions you are asked on this screen are:

- What 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.

Configure Event - Fall Fundraiser Dinner

Info and Settings | Event Location | Fees (disabled) | Online Registration (disabled) | Tell a Friend (disabled)

Save Save and Done Cancel

Paid Event ☒ Yes ☐ No

Payment Processor

If this is a paid event and you want users to be able to register and pay online, select a payment processor to use. NOTE: Alternatively, you can enable the **Pay Later** feature below without setting up a payment processor. All users will then be asked to submit payment offline (e.g. mail in a check, call in a credit card, etc.). ([learn more...](#))

Contribution Type *

This contribution type will be assigned to payments made by participants when they register online.

Fee Label *

This label is displayed with the list of event fees.

☒ Enable Pay Later option?

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

Pay Later Label *

Text displayed next to the checkbox for the 'pay later' option on the contribution form.

Pay Later Instructions *

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

Regular Fees

Use the table below to enter descriptive labels and amounts for up to ten event fee levels. These will be presented as a list of radio button options. Both the label and dollar amount will be displayed. You can also configure one or more sets of discounted fees by checking "Discounts by Signup Date" below.

Fee Label	Amount	Default?
<input type="text" value="Members"/>	<input type="text" value="295.00"/>	<input checked="" type="radio"/>
<input type="text" value="Non-members (regular)"/>	<input type="text" value="395.00"/>	<input type="radio"/>
<input type="text" value="Non-members (student)"/>	<input type="text" value="195.00"/>	<input type="radio"/>

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

Discount Set	Start Date	End Date
Early Registration Discount	May 06 2009	May 31 2009
<input type="button" value="Add Discount Set to Fee Table"/>		
Discounted Fees Use the table below to enter descriptive labels and amounts for up to ten discounted event fees for each discount set. Don't forget to click 'Save' when you are finished.		
Fee Label	Early Registration Discount	Default?
Early Registration Discount before June 1, 2009	\$ 100	<input type="radio"/>
Standard Fee	\$ 165	<input checked="" type="radio"/>
Performer Rate	\$ 150	<input type="radio"/>

- 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.

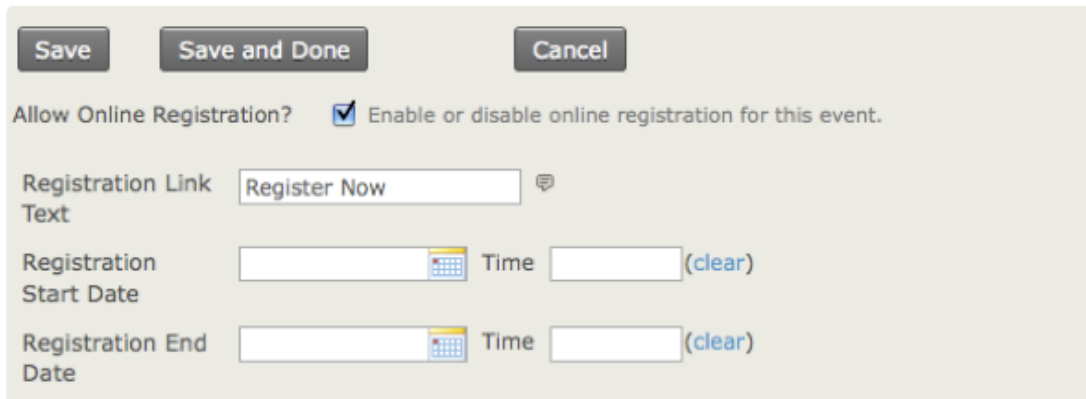
Online Registration

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.



The screenshot shows a configuration form for online registration. At the top are three buttons: 'Save', 'Save and Done', and 'Cancel'. Below them is a section titled 'Allow Online Registration?' with a checked checkbox and the text 'Enable or disable online registration for this event.' Underneath, there is a 'Registration Link Text' field containing 'Register Now' with a help icon. Below that are two rows for dates and times. The first row is for 'Registration Start Date' and the second for 'Registration End Date'. Each row has a date picker icon, a 'Time' field, and a '(clear)' link.

- 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".

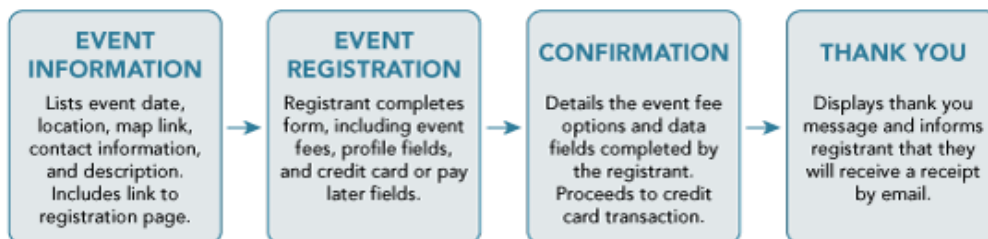
Include Profile (top of page) Name and Address
Include additional fields on this registration form by configuring and selecting a CiviCRM Profile to be included at the top of the page (immediately after the introductory message).

Include Profile (bottom of page) - select -
Include additional fields on this registration form by configuring and selecting a CiviCRM Profile to be included at the bottom of the page.

Profile for Additional Participants (top of page) - same as for main contact -
Change this if you want to use a different profile for additional participants.

Profile for Additional Participants (bottom of page) - same as for main contact -
Change this if you want to use a different profile for additional participants.

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



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

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

▼ **Confirmation Email**

Send Confirmation ☒ Yes ☐ No

Email? Do you want a registration confirmation email sent automatically to the user? This email includes event date(s), location and contact information. For paid events, this email is also a receipt for their payment.

Text

Additional message or instructions to include in confirmation email.

Confirm From
Name * FROM name for email.

Confirm From
Email * FROM email address (this must be a valid email account with your SMTP email service provider).

CC Confirmation

To You can notify event organizers of each online registration by specifying one or more email addresses to receive a carbon copy (cc). Multiple email addresses should be separated by a comma (e.g. jane@example.org, paula@example.org).

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

Tell-A-Friend

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

☒ Tell a Friend enabled?

Title *

Introduction
This message is displayed to the participant at the top of the Tell a Friend form. You may include HTML tags to add formatting or links.

Suggested Message
Provides the participant with suggested text for their personalized message to their friends.

Info Page Link
A link to this Event Information page is automatically included in the email sent to friends. If you ALSO want to include a link providing general information about your organization, enter that link here (e.g. <http://www.example.org/>)

Thank-you Title *

Thank-you Message
Your message thanking the participant for helping to spread the word. You may include HTML tags to add formatting or links.

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

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

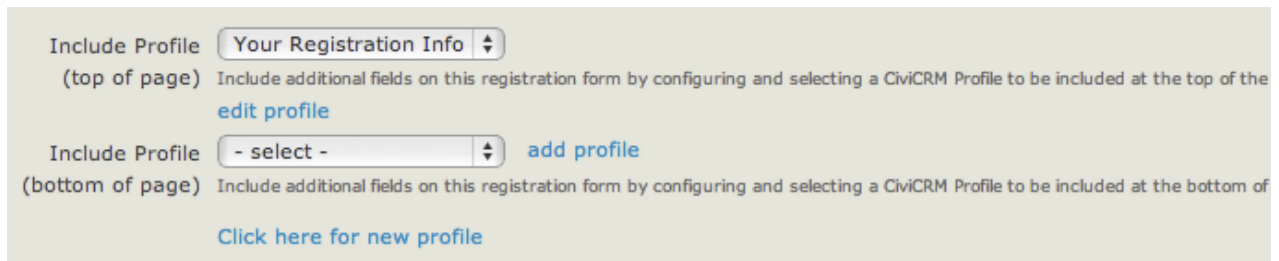
For more information see **Contributions > Personal Campaign Pages** in this book. This is the last step in creating an event. Click **Save and Done**.

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".



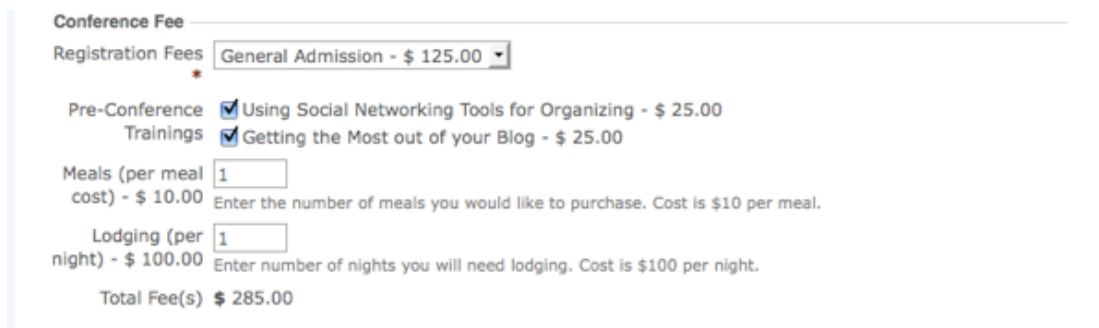
The screenshot shows a configuration form for online registration. It has two sections for including profiles. The first section, labeled "(top of page)", has a dropdown menu currently set to "Your Registration Info" and a link "edit profile". The second section, labeled "(bottom of page)", has a dropdown menu set to "- select -" and a link "add profile". At the bottom of the second section is a link "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:



The screenshot shows a registration form titled "Conference Fee". It includes several sections: "Registration Fees" with a dropdown set to "General Admission - \$ 125.00"; "Pre-Conference Trainings" with two checked options: "Using Social Networking Tools for Organizing - \$ 25.00" and "Getting the Most out of your Blog - \$ 25.00"; "Meals (per meal cost) - \$ 10.00" with a text input set to "1" and a note "Enter the number of meals you would like to purchase. Cost is \$10 per meal."; "Lodging (per night) - \$ 100.00" with a text input set to "1" and a note "Enter number of nights you will need lodging. Cost is \$100 per night."; and a "Total Fee(s)" of "\$ 285.00".

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

To create and manage price sets:

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

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

Creating a New Price Set

To create a new price set:

1. Click **Add Set of Price Fields**.
2. In the Price Set form, enter the name of your price set, 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.

Workshop Fees with meals and lodging - Price Fields

Field Label *

Input Field Type * ⓘ

Select the html type used to offer options for this field

Participant Count

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

Multiple Choice Options

Enter up to ten (10) multiple choice options in this table (click 'another choice' for each additional choice). If you need more than ten options, you can create an unlimited number of additional choices using the Edit Multiple Choice Options link after saving this new field. The option 'label' is displayed on the form, while the option 'value' is stored in the contact record. The label and value may be the same or different. Inactive options are hidden when the field is presented.

Default	Label	Amount	Weight	Active?
<input type="checkbox"/>	<input type="text" value="Collaboration Skills"/>	<input type="text" value="250.00"/>	<input type="text" value="1"/>	<input checked="" type="checkbox"/>
▼ <input type="checkbox"/>	<input type="text" value="Intro to Group Facilitation"/>	<input type="text" value="250.00"/>	<input type="text" value="2"/>	<input checked="" type="checkbox"/>
▼ <input type="checkbox"/>	<input type="text" value="Advanced Group Facilitation"/>	<input type="text"/>	<input type="text" value="3"/>	<input checked="" type="checkbox"/>

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.

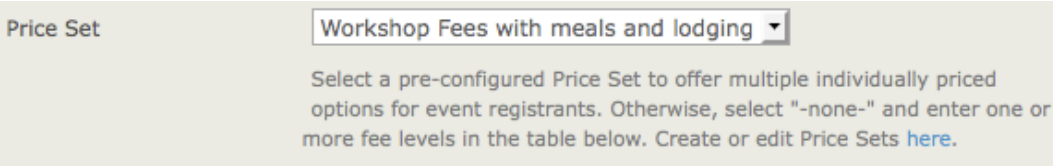
For Text/Numeric Quantity fields, enter an amount in the Price field. For Select, Radio and Checkbox types you will enter a price for each option in the table of options (shown in the screenshot above).

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.



The screenshot shows a form field labeled "Price Set" with a dropdown menu. The selected option is "Workshop Fees with meals and lodging". Below the dropdown, there is a text box with the following instructions: "Select a pre-configured Price Set to offer multiple individually priced options for event registrants. Otherwise, select '-none-' and enter one or more fee levels in the table below. Create or edit Price Sets [here](#)."

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

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

Testing your event

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

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

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

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

Using event templates to streamline event creation

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

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

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

Click **Events > Event Templates**.

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

New Event Template

Continue >> Cancel

From Template: - select -

Template Title: Monthly community meetup with online registrati

Event Type: Meeting

After selecting an Event Type, this page will display any custom event fields for that type.

Campaign: - select -

Participant Role: Attendee

The Role you select here is automatically assigned to people when they register online for this event (usually the default 'Attendee' role).

Participant Listing: Disabled

To allow users to see a listing of participants, set this field to 'Name' (list names only), 'Name and Email', or 'Name, Status and Register Date'.

Event Title: Insert Month Community Meetup

Please use only alphanumeric, spaces, hyphens and dashes for event names.

Event Summary:

Complete Description:

body p

Max Number of Participants:

☒ Include Map to Event Location?
☒ Public Event?
☐ Include this event in iCalendar feeds?
☒ Is this Event Active?

Continue >> Cancel

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

New Event

Continue >> Cancel

From Template: Monthly community meetup with online registration

Event Type: Meeting

After selecting an Event Type, this page will display any custom event fields for that type.

Campaign: - select -

Participant Role: Attendee

The Role you select here is automatically assigned to people when they register online for this event (usually the default 'Attendee' role).

Participant Listing: Disabled

To allow users to see a listing of participants, set this field to 'Name' (list names only), 'Name and Email', or 'Name, Status and Register Date'.

Event Title: April Community Meetup

Please use only alphanumeric, spaces, hyphens and dashes for event names.

Event Summary:

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.

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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.

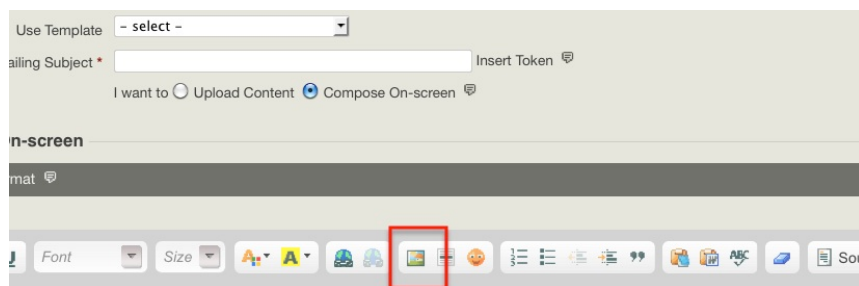
1. Click **Search > Find Contacts** (or **Advanced Search**). Choose your search criteria and click Search (or use any other search to find the contacts that you wish to email).
2. From the search results screen, choose some or all of the contacts and click - **actions** - > **Send Email to Contacts**.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

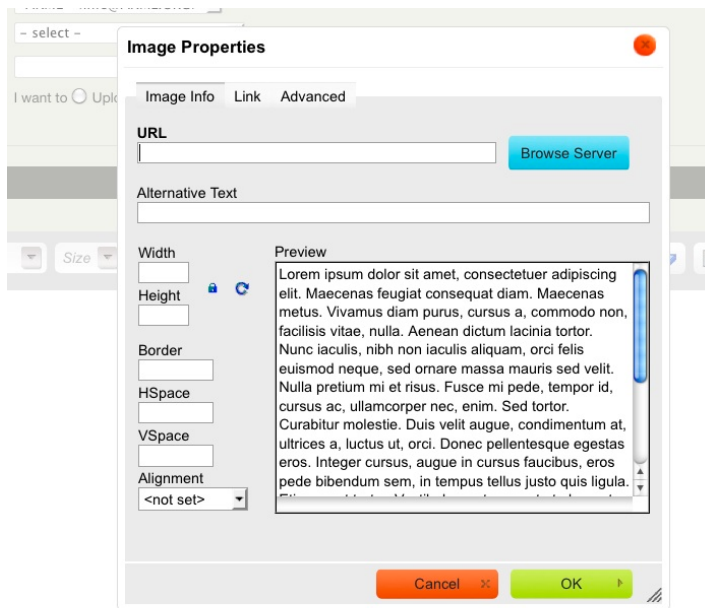
Note: If a message is sent to multiple recipients, each recipient will see only their own email address in the To field. Because the recipients don't see who else received the email, you might want to mention whom you are sending it to in the text of your mail (for instance: "TO: Members of the board,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

Inserting an image in an email

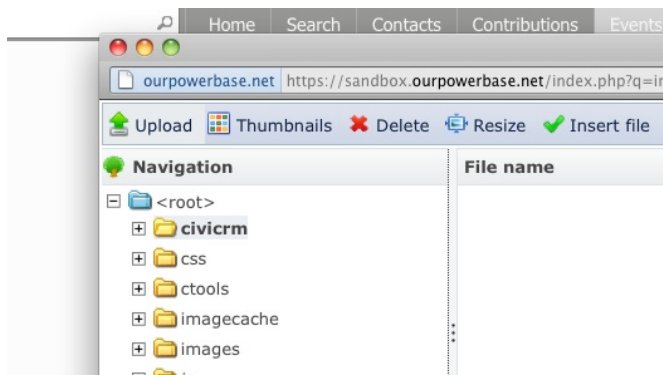
Click the **image** button in the WYSIWYG editor.



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.

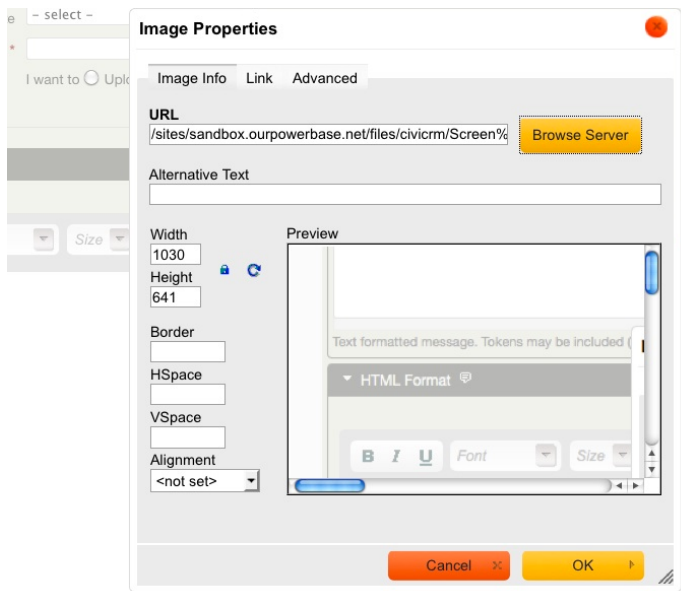


Your computer's file-browsing window will open. Find the image file you want, click to select it and click **Open**. You can repeat this process to upload multiple files to CiviCRM at once.

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 unsubscribe 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 `http://Google.com` but rather `click here to go to Google`.

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).

CiviMail Report: Support CiviCRM Newsletter

Delivery Summary

Intended Recipients	2	Report Advanced Search
Successful Deliveries	2 (100.00%)	Report Advanced Search
Tracked Opens	1	Report Advanced Search
Click-throughs	0	Report Advanced Search
Forwards	0	Report Advanced Search
Replies	0	Report Advanced Search
Bounces	0 (0.00%)	Report Advanced Search
Unsubscribe Requests	0 (0.00%)	Report Advanced Search

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".

Advanced Search

▸ Edit Search Criteria

2 Contacts

Mailing Name IN "Support CiviCRM Newsletter :: 2012-09-21 19:54:36" ...AND...
Mailing Delivery – Successful

Select Records:

☐ All 2 records ☐ Selected records only


[Print](#)

- actions -

[Go](#)

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

[Reset all selections](#)

<input type="checkbox"/>	NAME	ADDRESS	CITY	STATE	POSTAL
<input type="checkbox"/>	 Davies, Jack				
<input type="checkbox"/>	 Clark, Suzanne				

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

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.

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**.

▼ Event Report Templates	
» Event Participant Report (List) Existing Report(s)	Provides lists of participants for an event.
» Event Income Report (Summary) Existing Report(s)	Provides an overview of event income. You can include key information such as event ID, registration, attendance, and income generated to help you determine the success of an event.
» Event Income Report (Detail) Existing Report(s)	Helps you to analyze the income generated by an event. The report can include details by participant type, status and payment method.
» Participant list Count Report	Shows the Participant list with Participant Count.
» Income Count Summary Report	Shows the Income Summary of events with Count.

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 fields

Home » CiviCRM » Report Templates

Membership Report (Detail) - Template

Columns | Grouping | Sorting | Filters

<input checked="" type="checkbox"/> Contact Name	<input type="checkbox"/> First Name	<input type="checkbox"/> Last Name	<input type="checkbox"/> Contact Type
<input type="checkbox"/> Contact Subtype	<input type="checkbox"/> Contact ID	<input type="checkbox"/> Street Address	<input type="checkbox"/> City
<input type="checkbox"/> Postal Code	<input type="checkbox"/> State/Province	<input type="checkbox"/> Country	<input type="checkbox"/> Email
<input type="checkbox"/> Phone			
<input checked="" type="checkbox"/> Membership Type	<input checked="" type="checkbox"/> Start Date	<input checked="" type="checkbox"/> End Date	<input checked="" type="checkbox"/> Join Date
<input type="checkbox"/> Source	<input checked="" type="checkbox"/> Campaign	<input checked="" type="checkbox"/> Status	
<input type="checkbox"/> Financial Type	<input checked="" type="checkbox"/> Contribution Status	<input type="checkbox"/> Payment Type	<input type="checkbox"/> Transaction ID
<input type="checkbox"/> Receive Date	<input type="checkbox"/> Receipt Date	<input type="checkbox"/> Fee Amount	<input type="checkbox"/> Net Amount
<input type="checkbox"/> Payment Amount (most recent)			

Preview Report

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.

Columns
Grouping
Filters

☐ Contact ID
☐ Contact Name
☐ Financial Type
☒ Receive Date :
Frequency Year

☐ Contribution Source
☐ Campaign
☐ Street Address
☐ City

☐ Postal Code
☐ State/Province
☐ Country
☐ County

Preview Report

Contribution Summary Report – Template

Columns
Grouping
Filters
Title and Format
Email Delivery
Access

Preview Report
Create Report

Print Preview
Preview PDF
Preview CSV
» Existing report(s) from this template
Tabular
Add Contacts to Group
View

GROUPING(S) Receive Date
CONTRIBUTION STATUS Is Completed

YEAR BEGINNING	CONTRIBUTION AGGREGATE	CONTRIBUTIONS	CONTRIBUTION AVG	CAMPAIGN
2009	\$ 1,100.00	4	\$ 275.00	
2010	\$ 1,235.00	9	\$ 137.22	
2015	\$ 21,120.00	89	\$ 237.30	
Grand Total	\$ 23,455.00	102	\$ 229.95	

ROW(S) LISTED 4
TOTAL AMOUNT \$ 23,455.00 (102)
TOTAL CONTRIBUTIONS 102
AVERAGE \$ 229.95

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.

Columns
Grouping
Sorting
Filters

COLUMN	ORDER	SECTION HEADER / GROUP BY	PAGE BREAK
Membership Type	Ascending	<input type="checkbox"/>	<input type="checkbox"/>
Receive Date	Ascending	<input type="checkbox"/>	<input type="checkbox"/>
- none -	Descending	<input type="checkbox"/>	<input type="checkbox"/>

▶ another column

Preview Report

Membership Report (Detail) – Template

Columns
Grouping
Sorting
Filters
Title and Format
Email Delivery
Access

Preview Report
Create Report

Print Preview
Preview PDF
Preview CSV
» Existing report(s) from this template
Add Contacts to Group

MEMBER SINCE Between March 15th, 2015 and March 21st, 2015

CONTRIBUTION STATUS Is Completed

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"

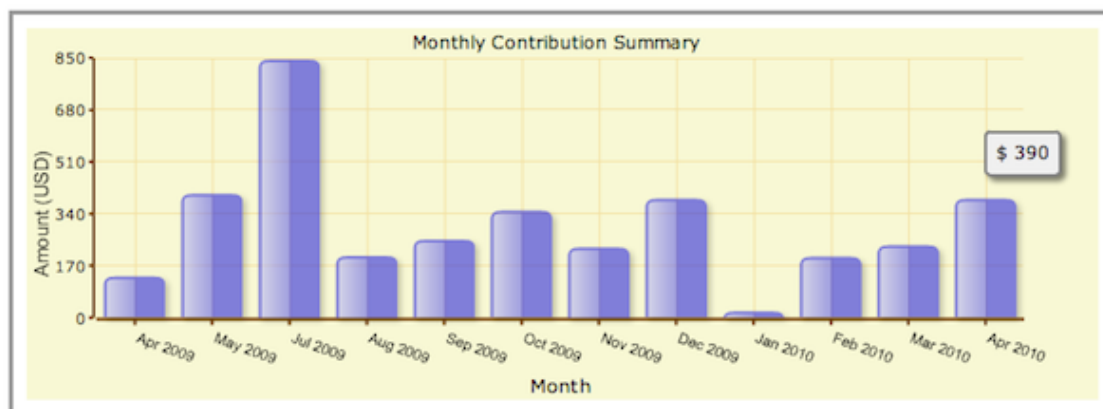
- by using a relative date range, e.g. "Previous Year".

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.



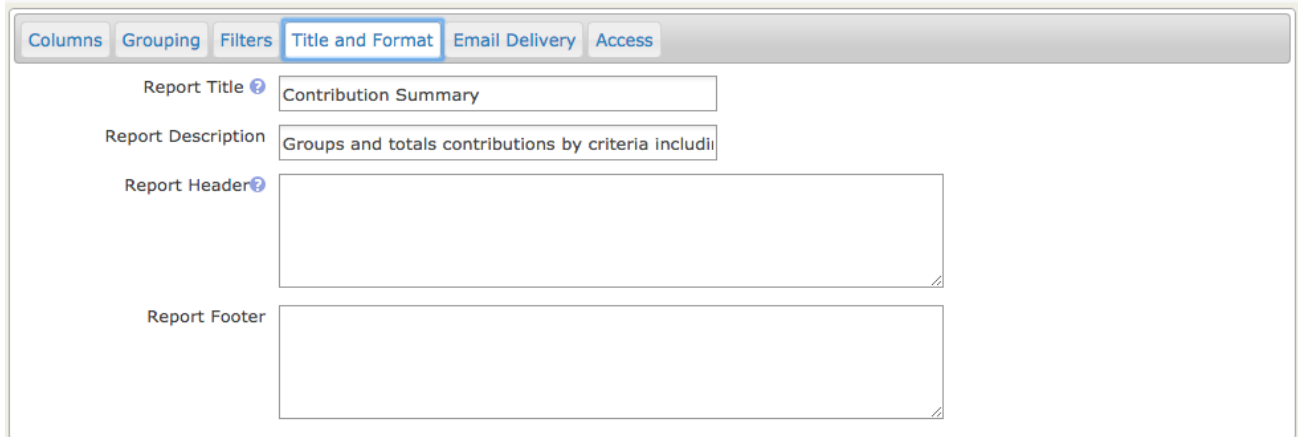
Once you have selected your report criteria, click **Preview Report**. (You will see that the tabs that define the report settings are now visible.) If the information displayed isn't exactly what you wanted, you can select the appropriate tab to modify your criteria. You may need to make several modifications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

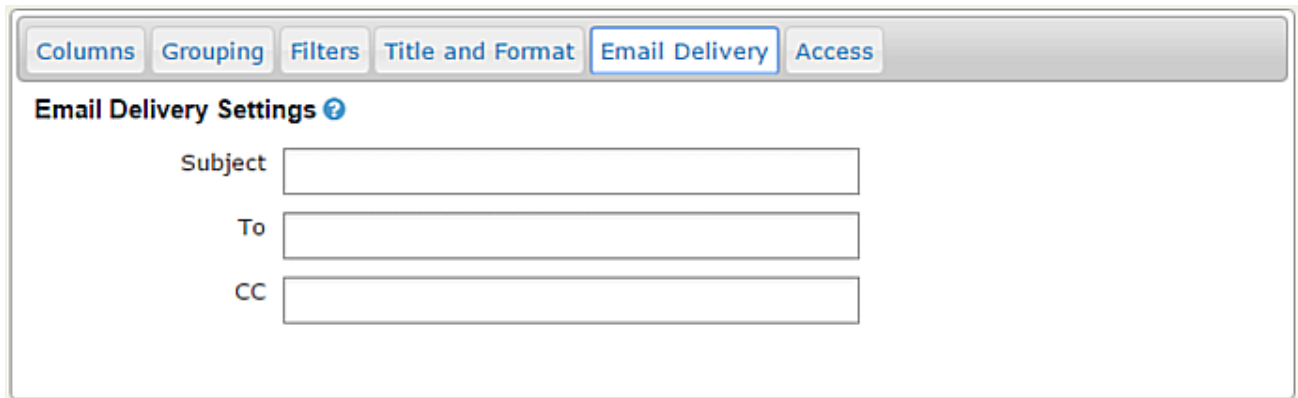
this criteria as a new report so that it can be run again. To do this:

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 by 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).



The screenshot shows the 'Title and Format' tab in the CiviCRM report configuration interface. The tab is selected and highlighted. Below the tab are four text input fields: 'Report Title' with the value 'Contribution Summary', 'Report Description' with the value 'Groups and totals contributions by criteria includi', 'Report Header' which is empty, and 'Report Footer' which is empty. Each field has a small question mark icon to its left.

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.



The screenshot shows the 'Email Delivery' tab in the CiviCRM report configuration interface. The tab is selected and highlighted. Below the tab is the 'Email Delivery Settings' section, which contains three text input fields: 'Subject', 'To', and 'CC'. Each field has a small question mark icon to its left.

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.

Columns
Grouping
Filters
Title and Format
Email Delivery
Access

Include Report in Navigation Menu?
☐

All report instances are automatically included in the Report Listing page. Check this box to also add this report to the navigation menu.

Permission ?

CiviContribute: access CiviContribute

ACL Group/Role

anonymous user
authenticated user
administrator
civicrm_webtest_user

Add >>
<< Remove

Reserved Report? ?
☐

If reserved, only users with 'administer reserved reports' permission can modify this report instance.

Available for Dashboard? ?
☐

Users with appropriate permissions can add this report to their dashboard.

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.

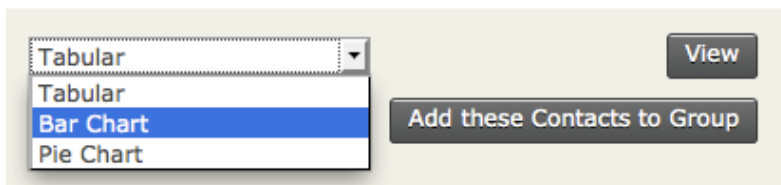
Viewing reports

To view a report:

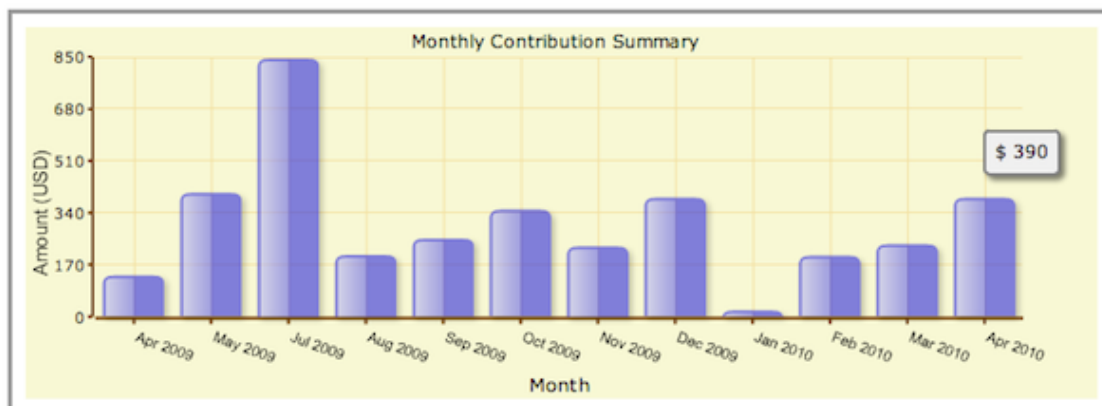
1. Go to **Reports**.
2. Select the relevant report type.
3. Click on the name of the report you wish to view.

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.



Relationship Report

Print Report

PDF

Export to CSV

Next > Last >> Records 1 - 50 of 151

Contact A

Mrs Chris T Zope Sr

Mr Brzeczysław I Parker Jr

Mrs Chris T Zope Sr

Contact B

Mr Sandy S Yadav Jr

Mr Sandy S Yadav Jr

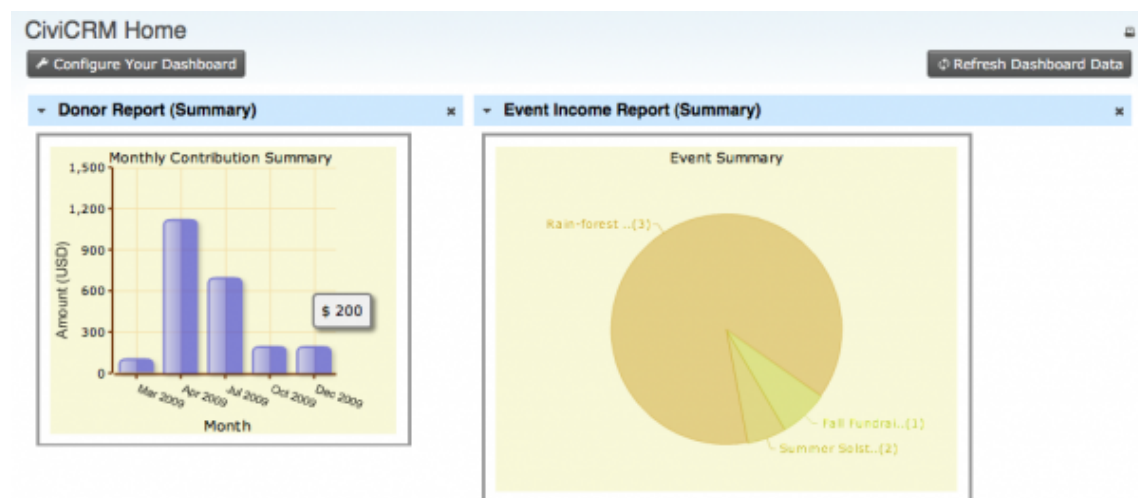
Mr Bruce M Grant Jr

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

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

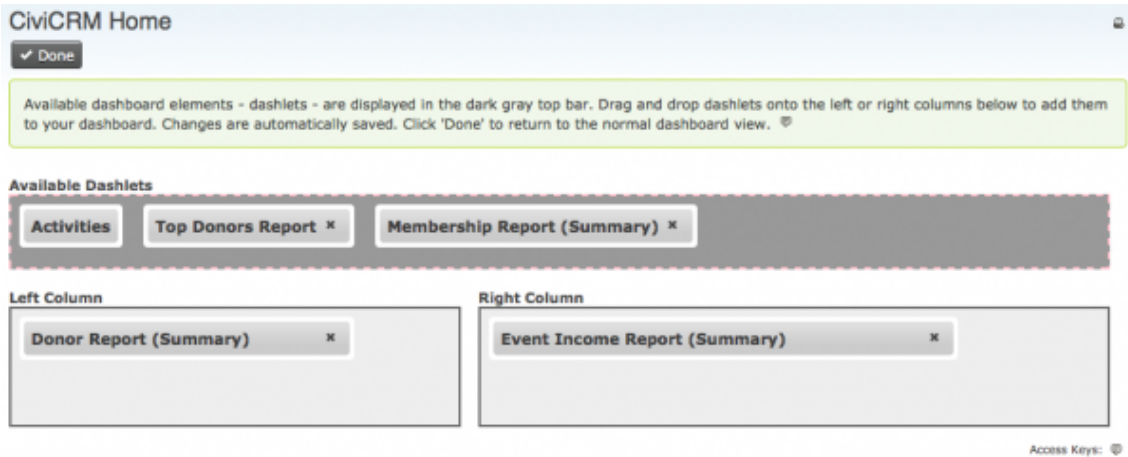
Reports on your dashboard

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



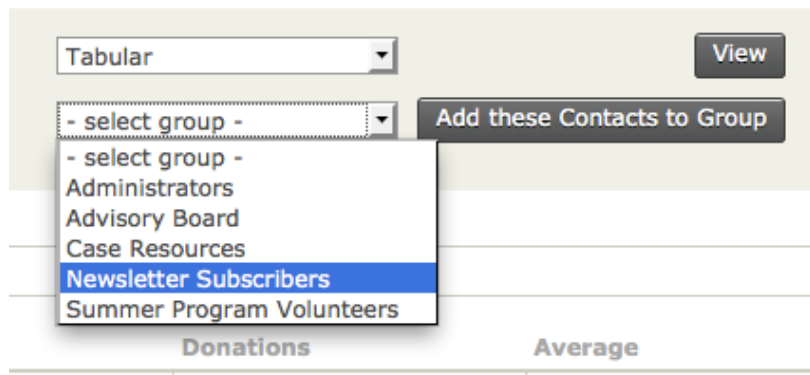
To display specific reports on your dashboard:

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



Adding report results to a group

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



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**.

Database Health Report - Template

Report Criteria

Display Columns

[x] Contact Name ☐ Contact ID [x] Modified Records
☒ Modified Organizations ☐ Modified Households [x] Sourced Activities
[x] Role ☐ Last Access

Set Filters

Contact Name: Contains []
User Role: Is one of [administrator, anonymous user, authenticated user, civicon]
Record Creation or Modification Date: Choose Date Range [] From: [] To: [] (Clear From:)
Activity Date: This Year []
Activity Type: Is one of [Media Coverage, Meeting, Membership Renewal, Membership Renewal Reminder]

Preview Report

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

Include Report in Navigation Menu? ☐

All report instances are automatically included in

Permission: CiviReport: access CiviReport

ACL Group/Role: anonymous user, authenticated user, administrator, civicon, Powerbase Administrator

Reserved Report? ☐ If reserved, only users with 'administer rese

Available for Dashboard? ☒ Users with appropriate permissions can ad

create Report

- 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@progressivetechnology.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/>