Day One: Fundamentals

Powerbase Training

Location: Ginn Parlour, 1233 Preservation Park Way, Oakland, CA 94612
Date: Monday, March 9, 9:00 - 5:00 pm

- Please follow along: https://training.ourpowerbase.net/
- Additional Documentation and resources: https://network.progressivetech.org/

Start	Topic	Instructor
09:00 AM	Logistics	Natalie
09:05 AM	Welcome, Introductions and Ground Rules	Alice
09:15 AM	Review of the day’s Agenda	Jamie
09:30 AM	Entering Canvass Results	Jamie
10:15 AM	Campaign and Powerbase Components	Alice
11:00 PM	Break	
11:15 PM	Advanced Searching	Jamie
12:00 PM	Lunch	
01:00 PM	Organizing your base into groups	Jamie
01:30 PM	Introduction to Events – Demo	Natalie
01:45 PM	Introduction to Contribution pages – Demo	Jamie
02:00 PM	Event and contribution page practice session	Natalie
02:45 PM	Break	
03:00 PM	Group Picture	
03:15 PM	Political Education: Where does your data live?	Jamie
03:30 PM	Communicating with your base	Alice
04:15 PM	Reporting	Jamie
04:45 PM	Recap and Evaluation	Natalie
05:00 PM	Done	

Training Category:
PowerBase

Reset my password

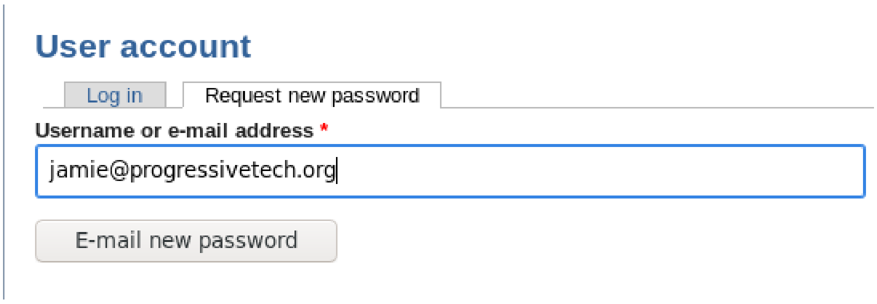
It's common to forget your password, and much better to forget it occassionally then to use a simple password.

Note: If you find that your new password is being rejected, be sure to login with your username, not with your email address

Here are the steps to reset it.

1. Open your database in your browser and click the "Request new password" link

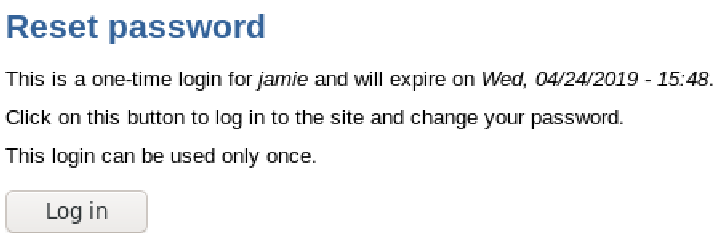
2. Enter either your username or email address



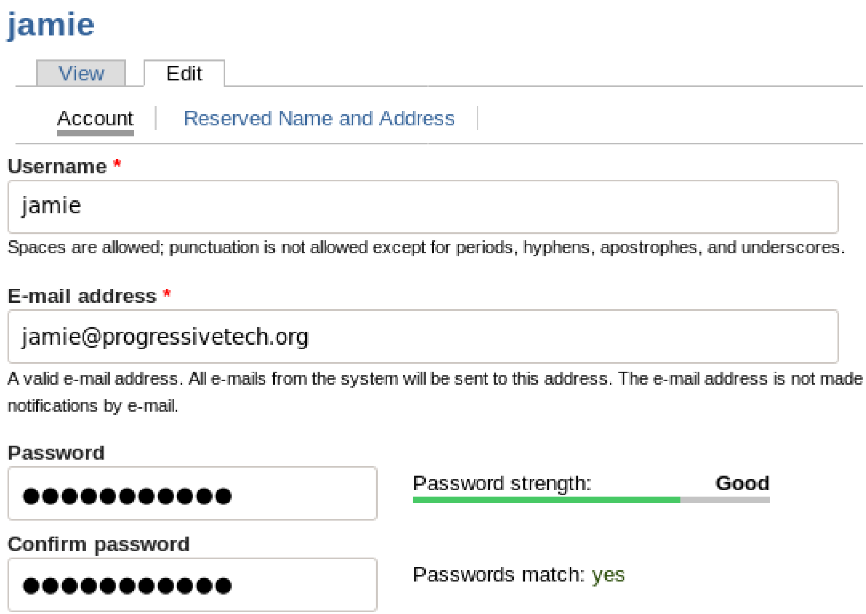
3. Click on the link in your email program

```
jamie,

A request to reset the password for your account has been made at PowerBase
Training and Demo.

You may now log in by clicking this link or copying and pasting it to your
browser:

https://demo.ourpowerbase.net/user/reset/119/1556048881/3G7oFZ-
uVx_gXAZP4P2linSXkiuUKMxqANDNBO3weVU

This link can only be used once to log in and will lead you to a page where
you can set your password. It expires after one day and nothing will happen
if it's not used.

--  PowerBase Training and Demo team
```

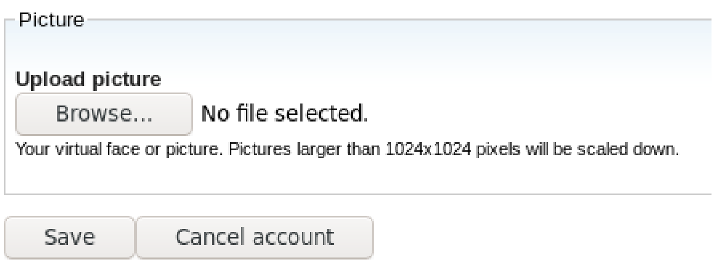
4. Click the login button



5. Enter a new password



6. Scroll down and click save



Category:
Admin Tasks

Sample Data Entry sheet

Number	Name	Address	Phone	Email
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
5.	Teodora Kinley	2430 Wallingford Rd, Winston Salem, NC 27101	123-555-2323	teodora.kinley@example.net
6.	Emelia Edelson	2440 Wallingford Rd, Winston Salem, NC 27101	123-555-3433	emelia.edelson@example.net
7.	Marge Light	2450 Wallingford Rd, Winston Salem, NC 27101	123-555-3221	marg e .light@example.net
8.	Mitchel Bunnell	2460 Wallingford Rd, Winston Salem, NC 27101	123-555-2342	mitchel.bunnell@example.net
9.	Akiko Ehrhardt	2470 Wallingford Rd, Winston Salemg, NC 27101	123-555-2531	akiko.ehrhardt@example.net
10.	Lavinia Calvin	2480 Wallingford Rd, Winston Salem, NC 27101	123-555-1345	lavinia.calvin@example.net
11.	Faye Grana	2490 Wallingford Rd, Winston Salem, NC 27101	123-555-2003	faye.grana@example.net
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	norert.matar@example.net
16.	Glenda Bhatti	2535 Wallingford Rd, Winston Salem, NC 27101	123-555-2754	glenda.bhatti@example.net
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
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 445132	123-555-1220	jose.anderson@example.net
22.	Stephen White	2460 Kingsgate Dr, Winston Salem, NC 27101	123-555-1532	stephen.white@example.net
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
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
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
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
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
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

File attachments:

canvassing-results.odt

canvassing-results.pdf

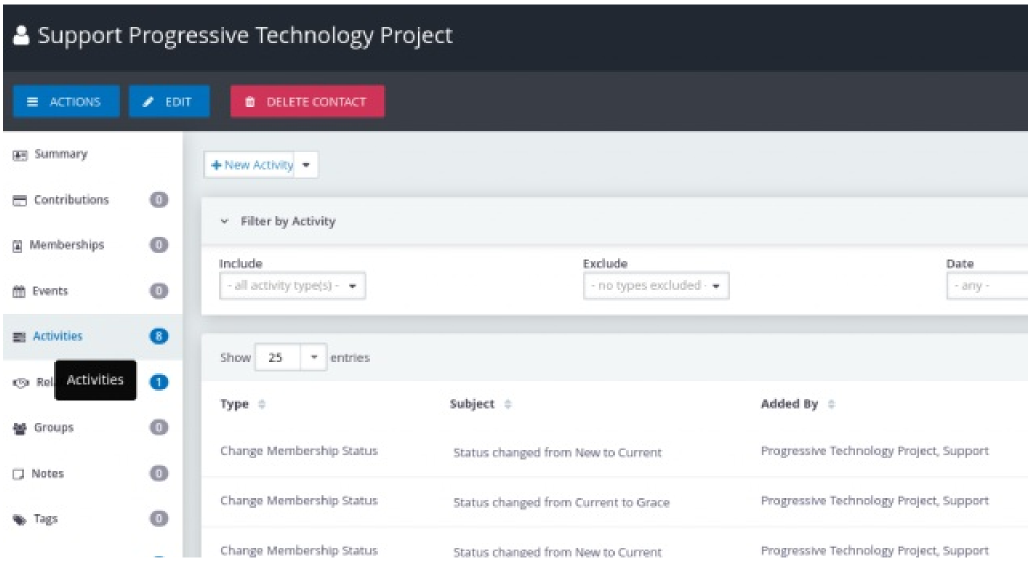
Category:

Collecting and Managing Contact Information

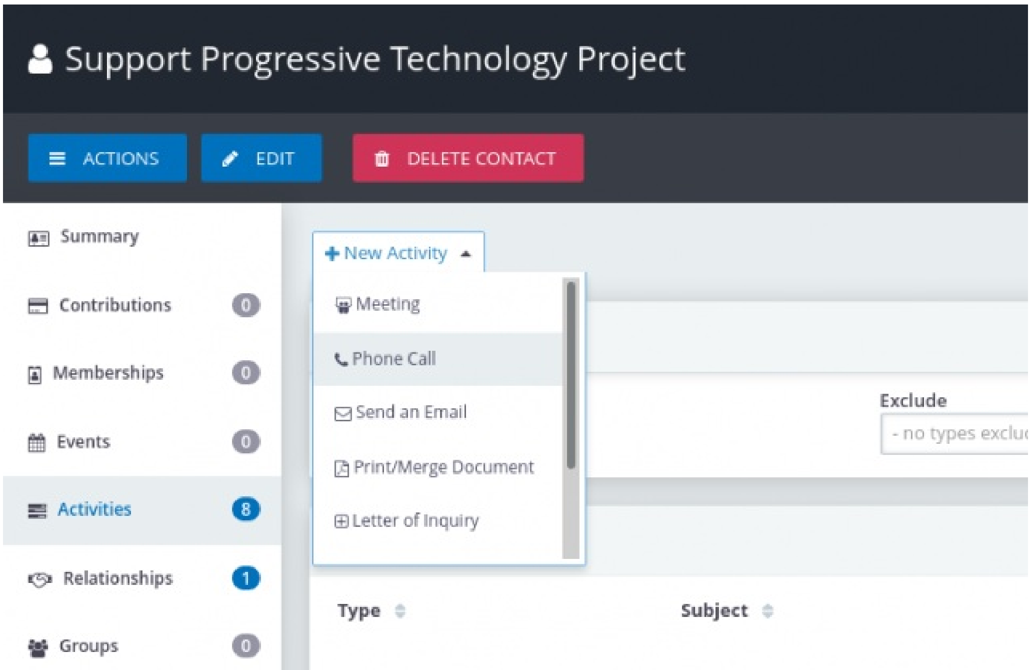
Adding an Activity to a Contact

When a contact makes a contribution or attends an event or recieves an email (among other things), an activity record is automatically added the records this interaction. Sometimes, however, we need to record other activities not automatically added, such as a phone call.

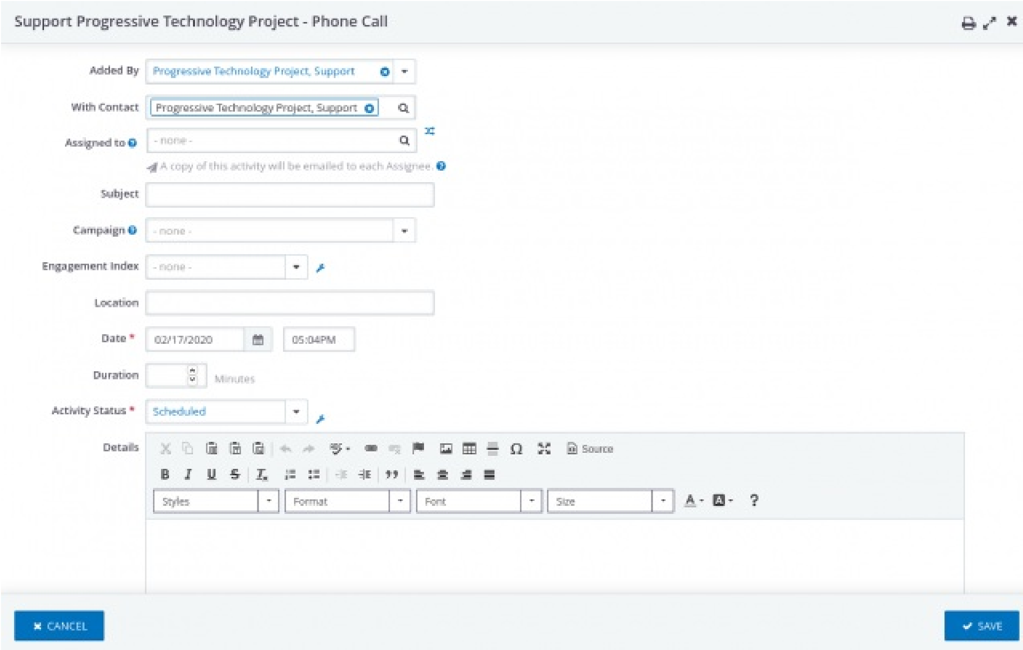
The first step is to find the contact you want to modify and then click the Activity tab.



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



Lastly, fill out the details and click Save.



Category:
Collecting and Managing Contact Information

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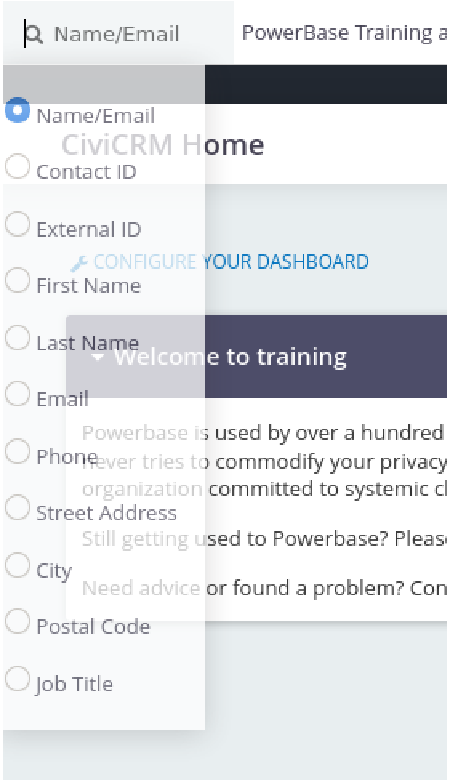
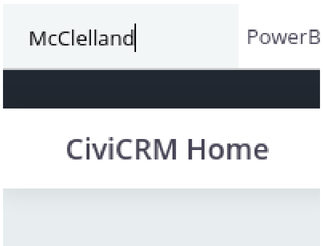
Basic Searching

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

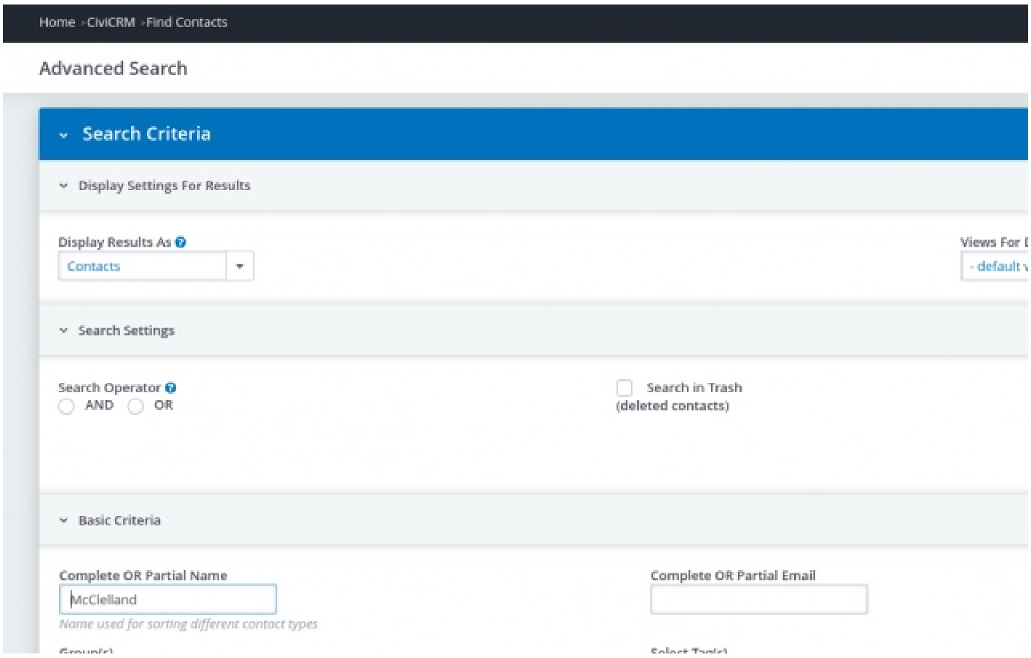
The easiest way to find a contact is using the quick search box in the top left. After clicking in this box, you will see a drop down allowing you to select which fields you want to search.



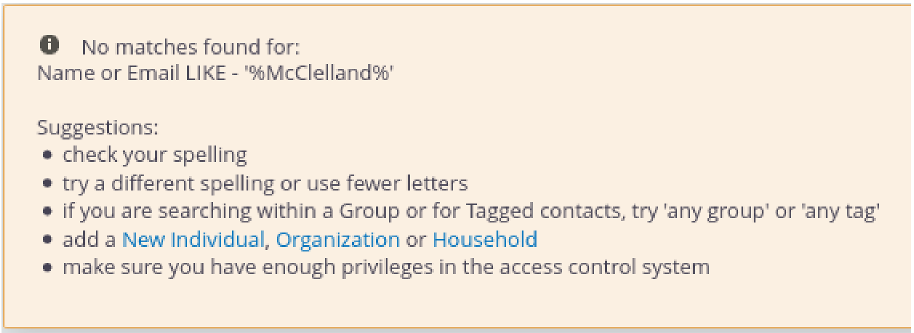
Name/Email is the default, and most common quick search. It searches any part of a name (first or last) and the email address. To select the default Name/Email, simply start typing the search term you would like to use.



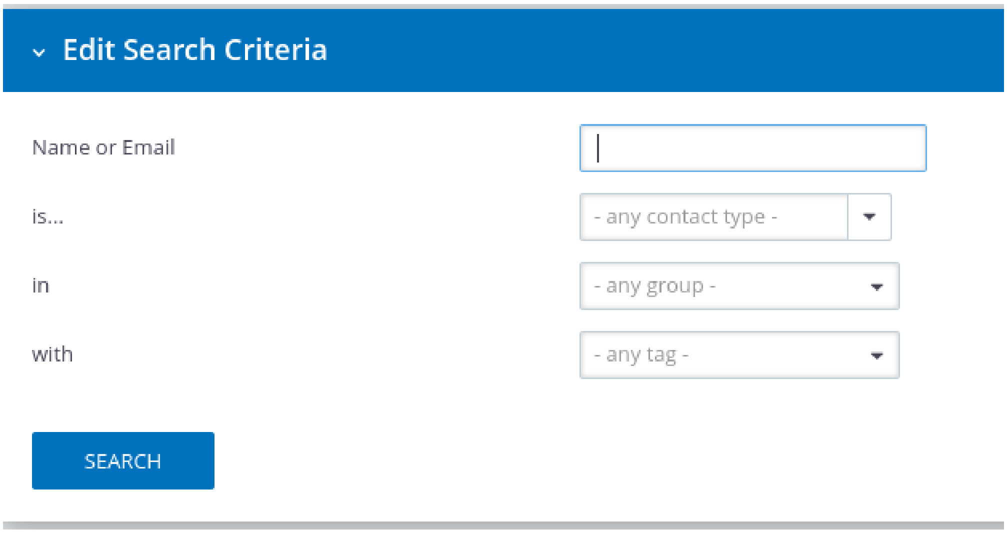
If no records are found, you will be sent to the advanced search screen (more on that below).



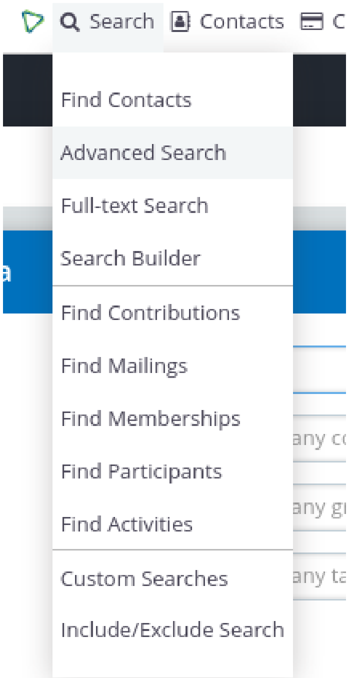
Which is quite confusing until you scroll down to see the message:



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



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



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

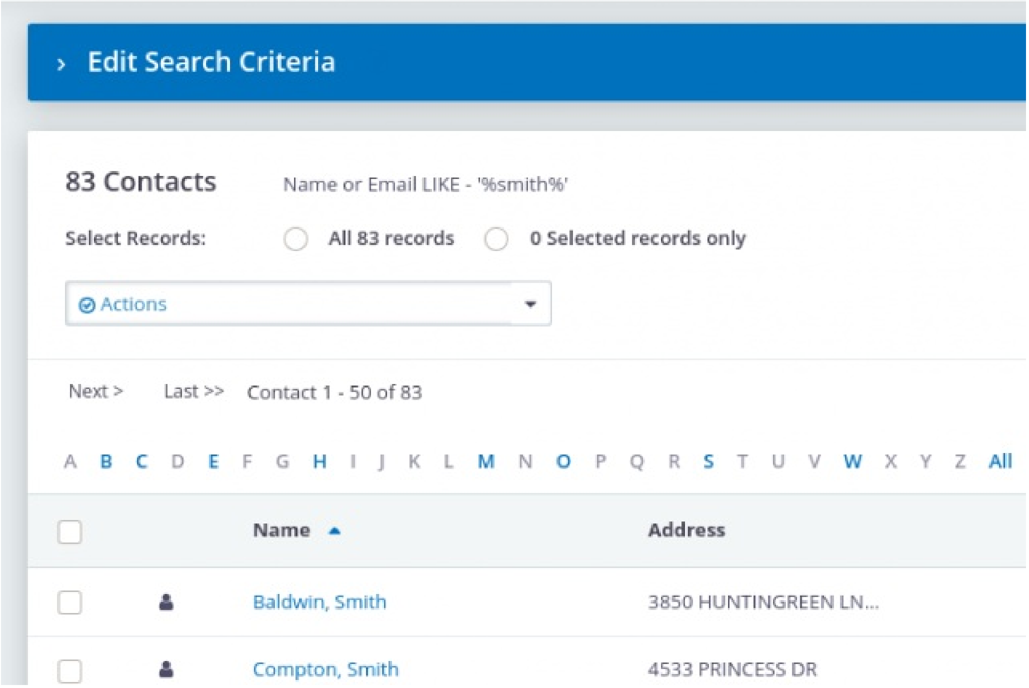
In addition, there are a few important fields in the advanced search form:

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

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

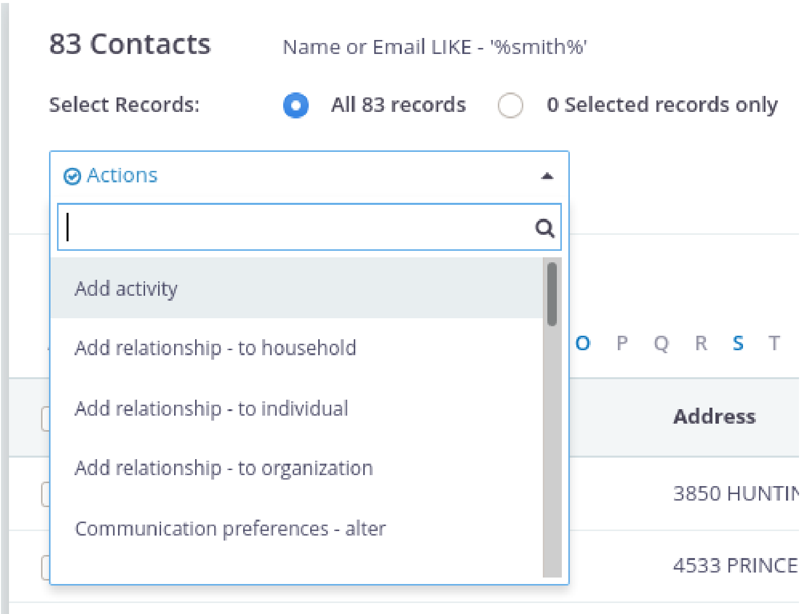
Working with Results

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



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

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



Category:
Search

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Exercise: Using Search to find Contents

The following exercise is designed to work with the Powerbase Training default data set.

Report the number of contacts returned for each search.

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

Extra Credit.

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

Category:
Search

Groups and tags

Groups and tags are two key methods of organising data in CiviCRM. When used properly, both allow for powerful segmentation and searching of your database.

Since both groups and tags are methods of categorisation, it can be difficult to determine whether a tag or a group is more appropriate in a given situation. Identifying the differences in their functionality will help you to decide which to use.

It can also be good to have a conceptual understanding of the differences between the two. Though there are different takes on how tags and groups should be used, a common philosophy is that tags should be used for descriptive categories of contacts, activities, and cases, while groups should be used for grouping people within an entity that needs to be treated like a cohesive unit (to send mailings to, for example). From this perspective, things like *volunteer*, *ally organisation*, *vegetarian* and *musician* would be tags with which you could categorise contacts while *Volunteer Committee, Allied Organisations Coalition, Vegetarian Newsletter*, and *This Awesome Band With A Bad Name* would be groups to which you could add contacts.

Groups

Groups are an incredibly important feature within CiviCRM. In addition to their fundamental use as collections of contacts that have something in common, they play a critical role in CiviMail and Profiles, and can be used to set up advanced access rights (on Drupal). Well-defined groups are one of the most important tools available when segmenting your CiviCRM contact database.

There are two kinds of Groups — (Regular) **Groups** and **Smart Groups**.

- Regular groups are just called **Groups**. You manually place contacts into and remove contacts from a (regular) group. For example, you can manually assign your organisation's board members to a Board of Directors group. You can then easily send board-related emails to each person who is a member of the Board of Directors group without having to search through CiviCRM and select each member individually for the mailing.
- **Smart Groups** are automatically populated groups that are configured to include contacts that share a certain set of characteristics or activities. As contacts are added or edited, CiviCRM automatically checks them and adds them to Smart Groups if they meet the characteristics that you have configured. For example, you can create a Smart Group for "2010 Contributors from California" that includes contacts who have made a contribution in the year 2010 (an activity) and have an address in California (a characteristic). When new contacts located in California make a contribution in 2010, they are automatically added to this group. Another example is a Smart Group of all donors who have not yet been sent a thank-you letter. As you send your letters, the donors receiving them will automatically leave the smart group, allowing you to always have an accurate list to work from.

Group settings and functionality

Each group should have a clear, easily understandable group name and a description of its purpose that other database users will be able to understand. Both the name and the description should allow users to quickly figure out what particular groups are for when working in different contexts (e.g. CiviMail). This clarity and specificity is especially important once your organisation has amassed many different groups. If a group is created for a specific person within your organisation, it is a good idea to mention who the group owner is in the description so that in the future someone can check if this group is still used or if it can be deleted.

Groups can be assigned the following standard types:

- **Mailing List** is used if you plan to use this group as a mailing list in CiviMail. This group type is available for both Regular and Smart Groups.
- **Access Control** (Drupal only) is used to assign CiviCRM access permissions to a set of contacts. Only Regular Groups can be assigned the Access Control group type.

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

Visibility

Visibility determines permissions for joining and removing contacts from groups. Select "User and User Admin Only" if membership in this group is controlled only by authorised CiviCRM users. Select "Public Pages" if you want to allow contacts to join and remove themselves from this group via Registration and Account Profile forms.

Some organisations find it useful to create a hierarchy of groups. In CiviCRM, this is done by creating one or more parent groups and then assigning other groups to them. When a user sends a mailing to a parent group or searches for contacts in a parent group, all contacts in the associated child groups are automatically included.

For example, an organisation that has a national office and 5 regional offices puts constituents in each region into their own group. Then they create a National group which is assigned as the parent group for all regional groups. The national office can now send mailings to the National group, knowing that all contacts in the regional groups that are children of the National group will be included.

Group IDs

CiviCRM assigns a unique numeric ID to each group. These group IDs can be used for a variety of operations. For example, the group ID can be used to define a URL for group sign-ups. You can find a group's ID by checking the ID column in the tabled list of groups at **Navigation Menu > Contacts > Manage Groups**.

Tags

Tags are used to categorise contacts, activities and cases in CiviCRM. You can create as many tags as needed to classify the contacts in your database, though it is advisable to avoid duplicating existing tags or adding too many tags that aren't really necessary. It can be useful to create a standard process for creating and using tags within your organisation to avoid these problems.

Groups versus tags

This is a common question on any project, and the philosophy described in the introduction of this chapter is a guideline, but rules might need to be bent based on how you intend to use your contact segmentation.

One interesting benefit of having both groups and tags is that you can perform more refined searches using AND and OR. For instance, if you have journalists, volunteers and members as groups and use tags to identify topics of interests such as development, art and history, you can find all the journalists who are interested in art or development, all the volunteers or members that are interested in history, or any other combination.

Beside that, groups have some features that tags don't: - Groups are integrated into several other CiviCRM functions (most notably CiviMail).

- Contacts can be added to smart groups automatically based on characteristics.
- Groups can be associated to Drupal Organic Groups.

Think of it this way: tags can be applied to contacts, activities, and cases, whereas groups can only consist of contacts.

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

Benefits of tags

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

Limitations of tags

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

Benefits of Groups

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

Limitations of Groups

- All existing Groups are listed under Manage Groups and in the search forms. This may cause group "overload" if your organization winds up with "too many" Groups.
- Groups used for short-term projects should be "purged" when they're no longer needed
- When exporting contact records, all the Groups a contact belongs to are exported as a single comma-separate list (e.g. "Administrators,Newsletter Subscribers")

You can add contacts to groups in multiple ways:

- through the Tags and Groups section of the Contact Details edit screen
- through a contact's Groups tab
- by using the "Add Contacts to Group/Tag contacts" batch action after conducting a search
- by clicking a group's Contacts link in **Navigation Menu > Contacts > Manage Groups**.

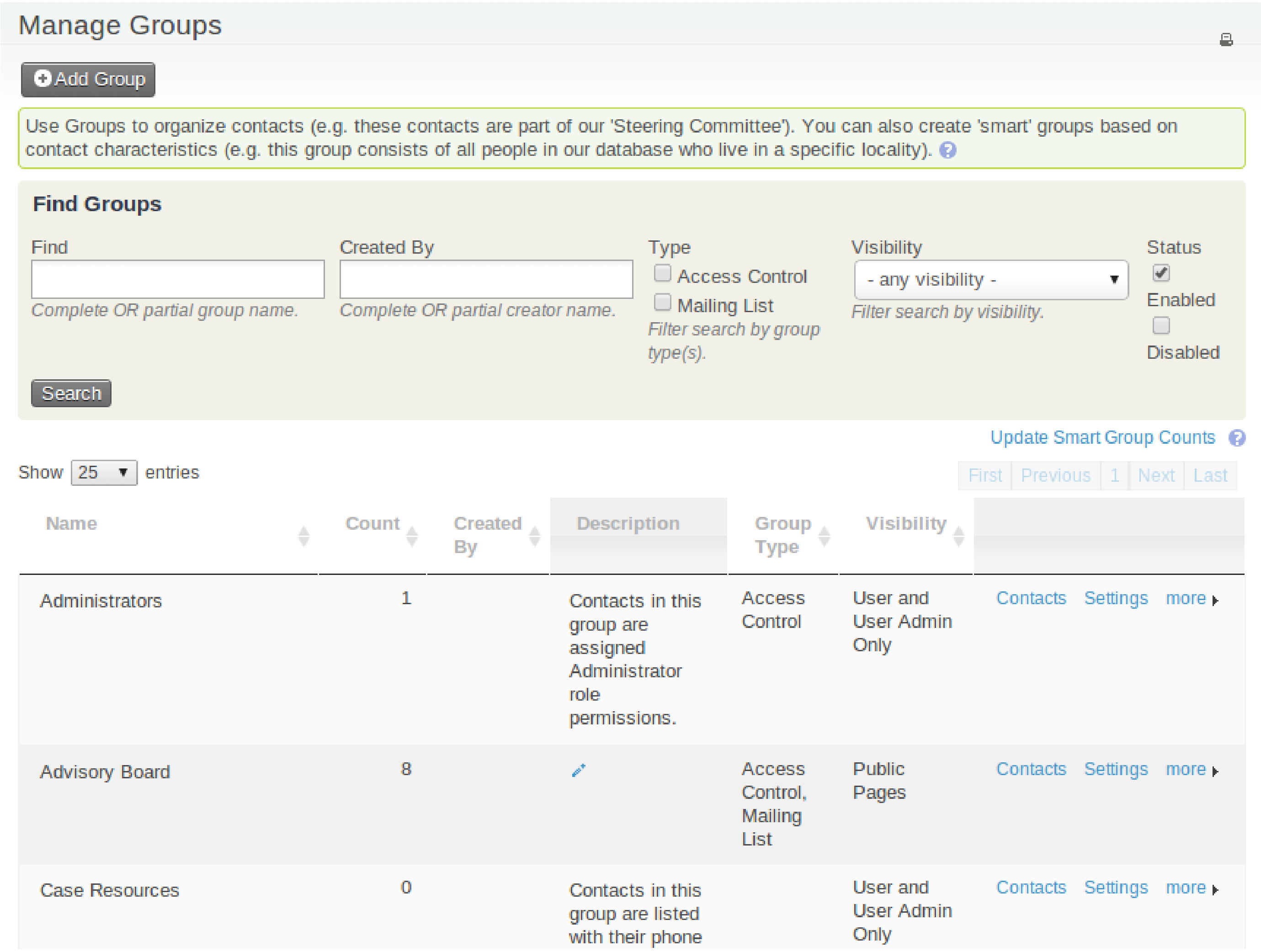
The first two methods also allow you to remove individual contacts from a group. The last two methods allow you to add multiple contacts to groups at once.

Individual contacts can be added to a Group either in the contact edit screen or via the Groups tab. Multiple contacts can be added to a group at once by conducting a search, and then selecting Add Contacts to a Group using the More Actions menu. The second way allows you to add multiple contacts to a group by going to Manage Groups, selecting Members for the relevant Group and then using the Add Members to this Group option at the top of the screen.

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

Managing Groups

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



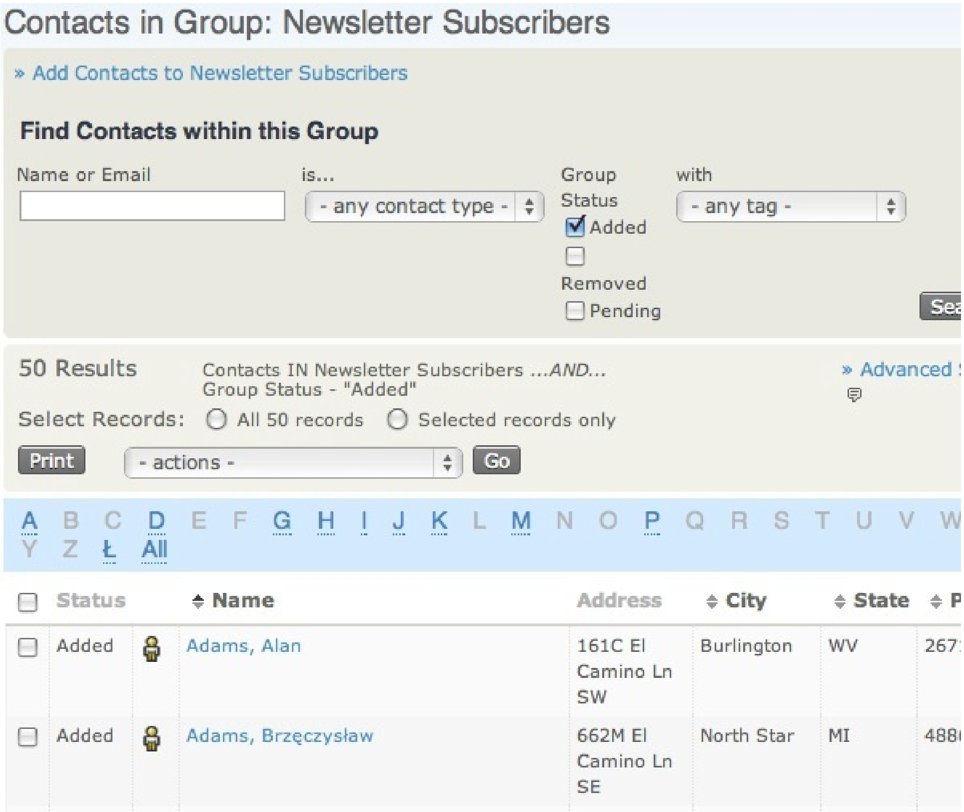
You can use the Find Groups form at the top of the Manage Groups screen to search for groups by name, type, visibility and whether the group is enabled or disabled. You can also scroll or browse through the list of groups further down the Manage Groups screen. This list includes both regular and smart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

You can:

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

Finding contacts in a group

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



Groups and ACL

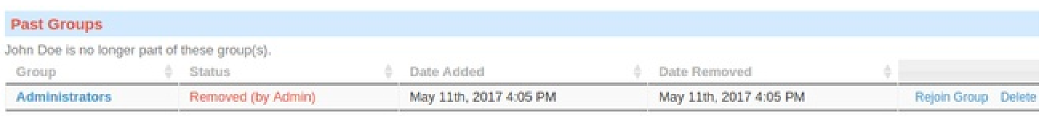
Access Control Lists (ACL) provide finer grained permissioning than what is available through Drupal's Permissions and Roles. Setting up ACLs requires a good understanding of the concept, which is thoroughly explained in the online CiviCRM documentation here: http://wiki.civicrm.org/confluence/display/CRMDOC/Access+Control

As with many processes, the key is to make sure you have assembled all the parts before you try to join them together. In this case, you must set up the required Groups, Custom Data Groups, Profiles and Roles before you can use them in ACL.

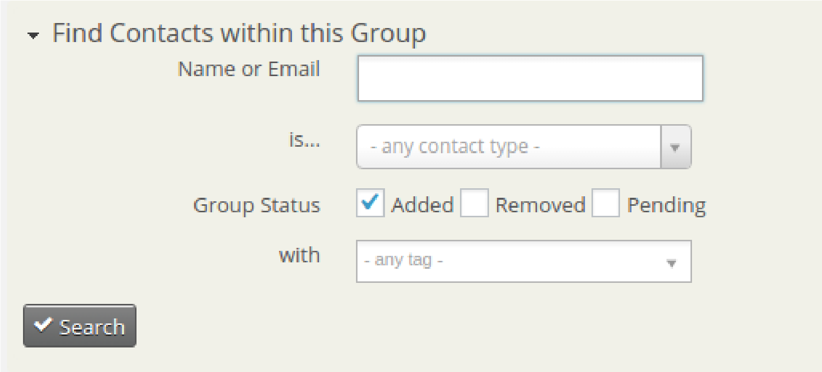
> **Note**
> ACL support for Joomla was introduced in Joomla version 1.6.

Removing versus deleting contacts from groups

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



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



You can also **Delete** a contact from a group. That will eliminate any record of the contact being in the group.

Working with tags

To view tags, go to: **Contacts > Manage Tags (Categories)** in the navigation menu.

A tag can be edited or deleted using the respective links in its row. New tags can be created by clicking the Add Tag button on the Manage Tags (Categories) screen or by going to Contacts > New Tag in the navigation menu.

Add Tag | Add Tag Set

Tags

Tag	ID	Description	Parent ID	Used For	Tag set?	Reserved?	
Company	2	For-profit organization.		Contacts			Edit | Delete
Government Entity	3	Any governmental entity.		Contacts			Edit | Delete
Topics of interest	17			Contacts, Activities, Cases	✓		Edit | Delete

Each tag should have a clear and unique name and an explanatory description to help users understand the tag's purpose. Tags can be structured hierarchically and designated as subtags of an existing tag by selecting a Parent tag from the dropdown list.

Tags can be designated for use for contacts, activities and/or cases. If a tag is designated for use for contacts, it will be available for all contact types and subtypes; tags cannot be specifically designated for use for only one type of contact.

Tags are a flexible tool and every user can create more if needed. However, very important tags can be locked to prevent them from being modified or deleted by users who do not have the "administer reserved tags" permission (this permission is available in Drupal only).

Tags can be assigned to contacts, activities and cases in the following ways:

- while creating or editing the record
- from the Contact Summary Tags tab
- by using the Tag Contacts batch action after conducting a search.

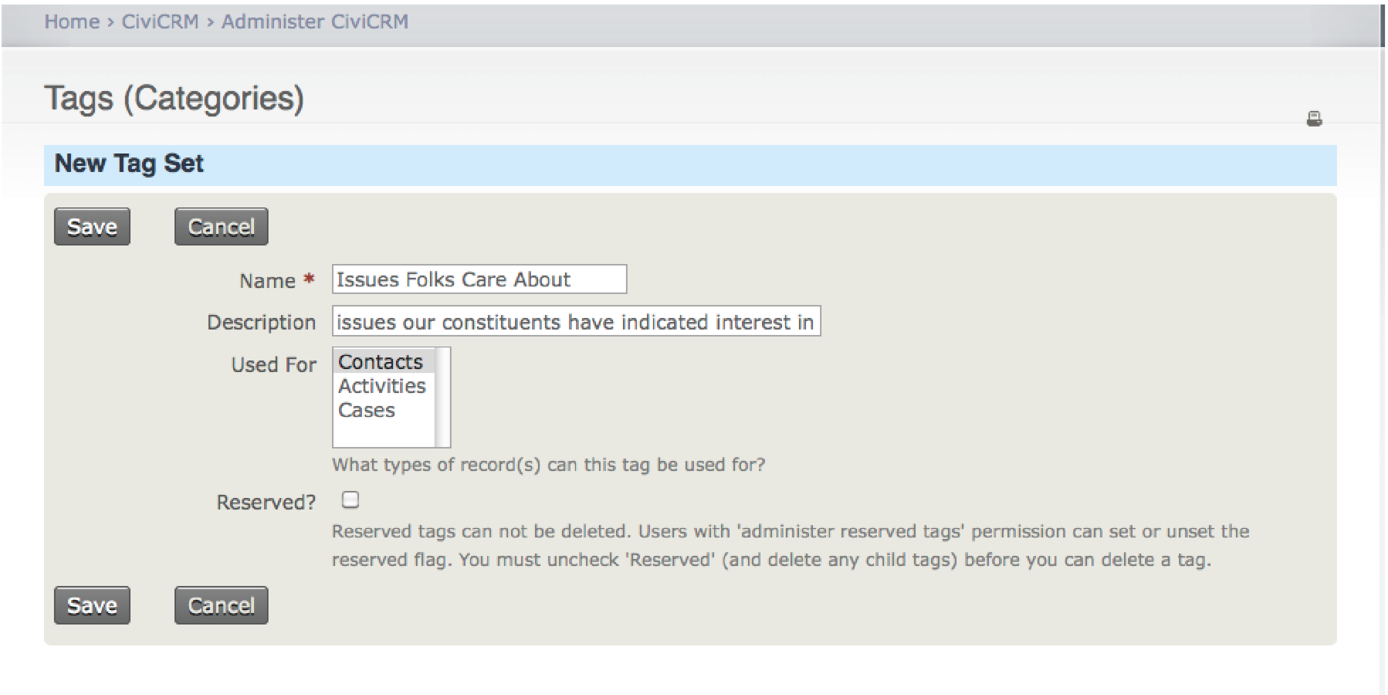
You can also use the first two methods to remove tags.

Tag sets

Tag sets are a free-form way of tagging contacts and are similar to regular tags, but they differ from regular tags in a few key ways:

- they act as a "bucket" to allow you to group tags (i.e. an Issues People Care About tag set might contain the tags "affordable housing", "racial justice", or "water quality")
- they allow tags to be created on the fly without you having to access the Manage Tags page
- adding them creates an additional search field in the Basic Criteria section of the Advanced Search

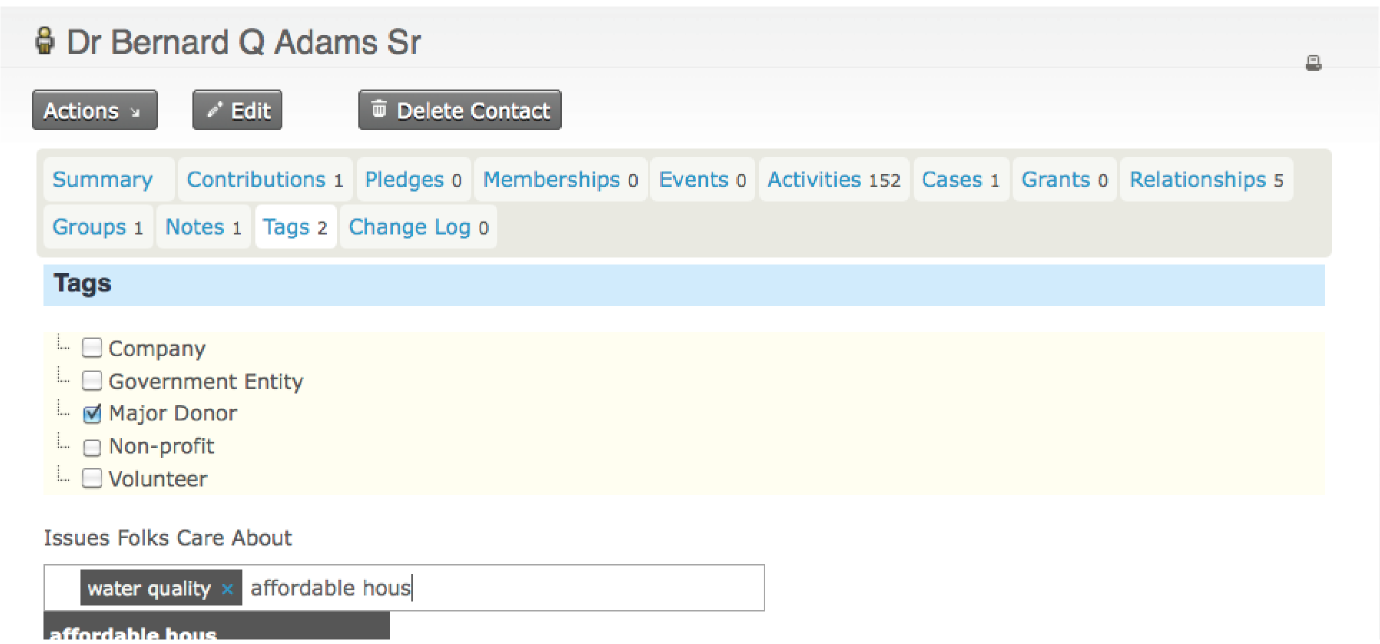
Tag sets are created by going to: **Contacts > Manage Tags (Categories)**in the navigation menu and clicking the Add Tag Set button. Give the tag set a name, a description, and indicate whether the tag set will apply to contacts, activities, or cases.



Clicking the Reserved checkbox makes a tag set more permanent - this will prevent a tag set from being deleted by someone without Administrator permission. (Read more about permissions, in the *Permissions and Access Control* chapter of *Initial Set Up* section.)

Now you can use the tag set to freely tag a contact, activity, or case record.

When you create a new tag set, a new field shows up on the edit pages of the entity's activities or cases as well as in the Tags tab for contacts. For example, if you create a tag set called "Issues Folks Care About" an associate it with Contacts, you will see the tag set next time you go to the Tags tab of a contact's record.



This is an autocomplete field: as you begin to type, CiviCRM looks for matching tags in this tag set and displays any matches below the field. You can select an existing tag or create a new one by typing the entire tag and pressing the Enter key. The tag will then appear within the field in a box. Clicking on the X will untag the record that you are editing (contact, case or activity).

Tags created within a tag set will automatically appear in the normal **Contacts > Manage Tags (Categories)** list and can be viewed and edited from there. However, tags created within a tag set will only be available within that particular tag set.

A Note About Searching on Tags and Tag Sets

For each tag set you create, a new field will appear in the Basic Criteria section of Advanced Search. You can only search on tags that already exist in this tag set.

Searching in the All Tags field will allow you to find records with tags (regular or tagset tag) which contain a complete or partial word or phrase. EXAMPLE: If you have several tags that contain the word 'Donor', you can find contacts tagged with any of them by entering 'Donor' in this field.

Read extensively on using Advanced Search in the Searching section.

Next
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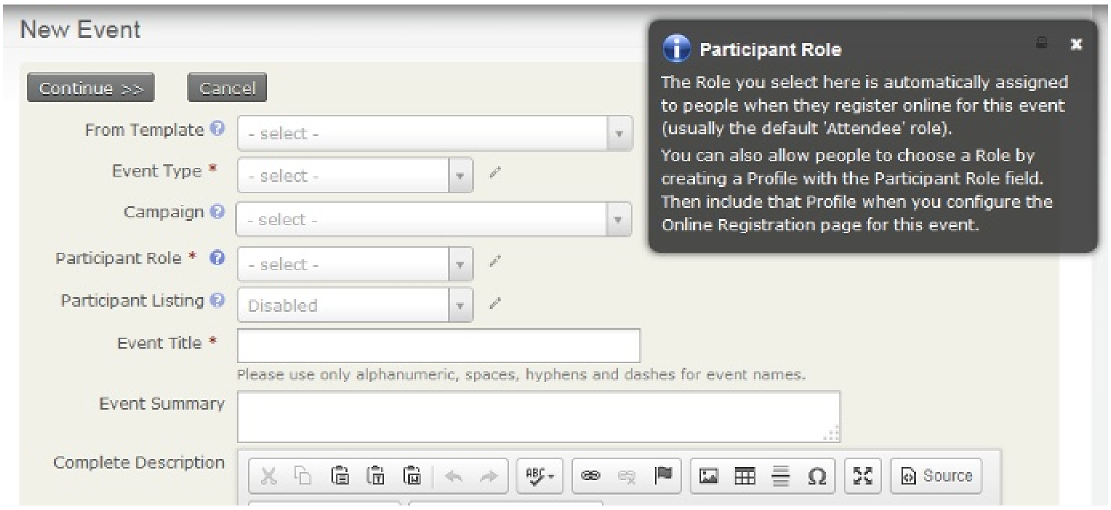
Creating an event

This chapter covers how to create a new event, describing each of the set up options available in the event creation screen. If you're going to allow online registration for the event, you will also want to read the online event registration chapter. If not, you'll want to read the manual event registration chapter.

To get started, create a new event by choosing **Events > New Event** from the menu. (If you can't see the events menu, make sure that you have enabled the Events component. You can do this in **Administer > System Settings > Components**.)

Event Information and Settings

The first page you see when creating an event requests basic information online about the event. You can click on any of the blue question marks to show help for each of the fields. When you see a pencil, clicking on it will take you to a screen where you can edit the options available. Note, depending on your permissions, you may not be able to edit these options and therefore will not see the pencil.



From template allows you to create an event from a template (see *Event templates* chapter in this section) rather than creating one from scratch.

Event type allows you to categorise the event.

If you have **CiviCampaign** enabled, you can select a campaign for this to be a part of (see the Campaign section for more details).

Roles distinguish different types of event participants, such as attendees, speakers and staff. What role should participants be assigned when they register online for this event? The value placed in this field will be assigned by default when users register online or when you import registrations unless you include the field Participant Role with other values in your CSV import file. 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 one, you will need to create a menu item or link to the listing somewhere on your website. Once you've created the event, the participant listing link is displayed on the event configuration page. Refer to the chapter Event management for information on participant listings and other ways to promote your events.

What is your event called? The **Event 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.

You can set a **Maximum number of participants** for each event and define a message to be displayed when that number is reached.

If you want to display a map showing the event location you can do so using either Google Maps or Open Street Maps (you will need to configure your mapping solution through **Administer > System Settings > Mapping and Geocoding**).

Select the **Public Event** box to include the event in promotional listings such as RSS feeds, iCal files or feeds, and event listing pages.

Select **Allow sharing through social media** to include social media links for sharing this event on the Event Info page, Thank-you page, Tell-a-Friend page (if enabled), and in event confirmation emails.

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.

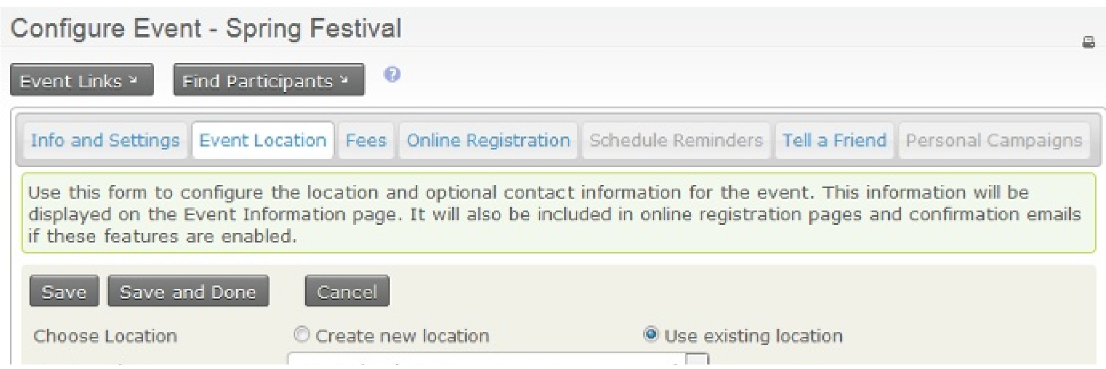
After reviewing the details on this page, click **Continue >>** to create your event and advance to the next step. You can interrupt configuration on any subsequent page by clicking **Save and Done** and return later to review and modify any of the settings.

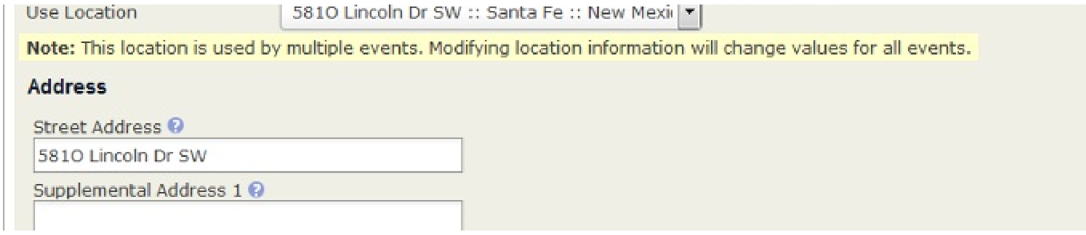
To return to a saved event, navigate to **Events > Manage Events** and click **Configure** to continue working on the event.

Event Location

The next step is to complete the location and contact details for the event.

Once you have entered an event location, you can reuse it for subsequent events by clicking **Use existing location** and selecting it from the dropdown list. Note that if you choose an existing location and edit it, it will update that location for all events that use it.





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.

Fees

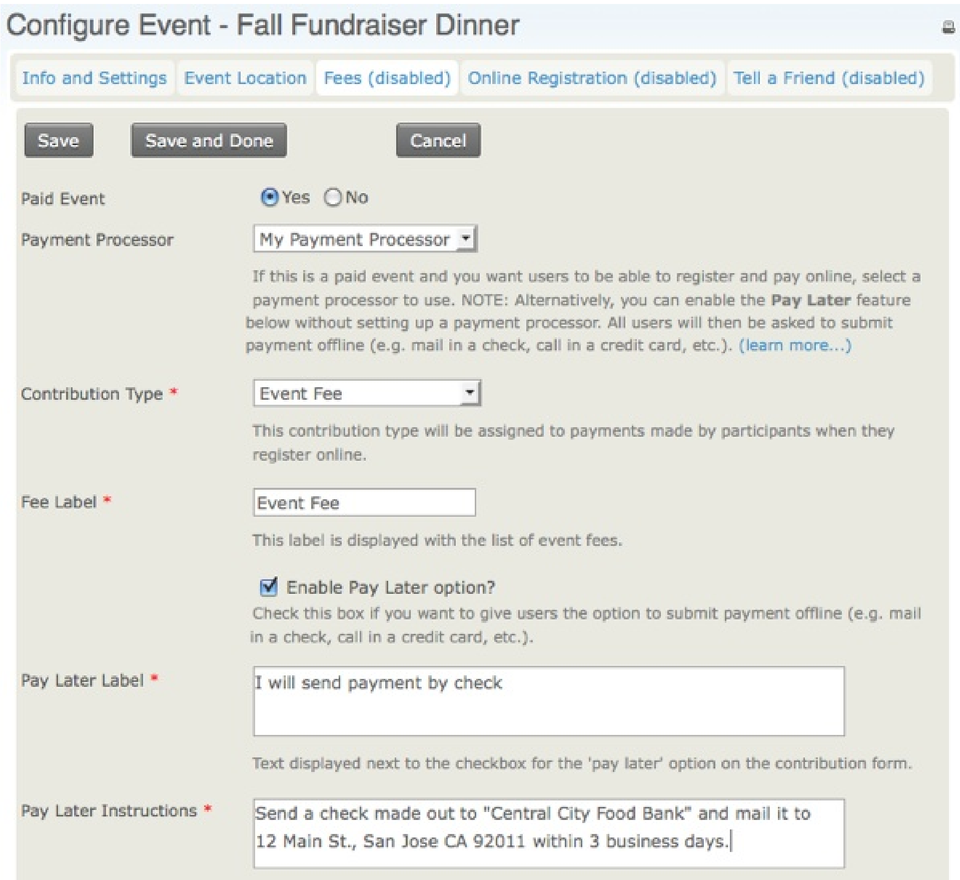
If the event is free, set the **Paid Event** radio button to **No**, then click **Save** and skip to Online Registration.

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

What **Contribution Type** (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.

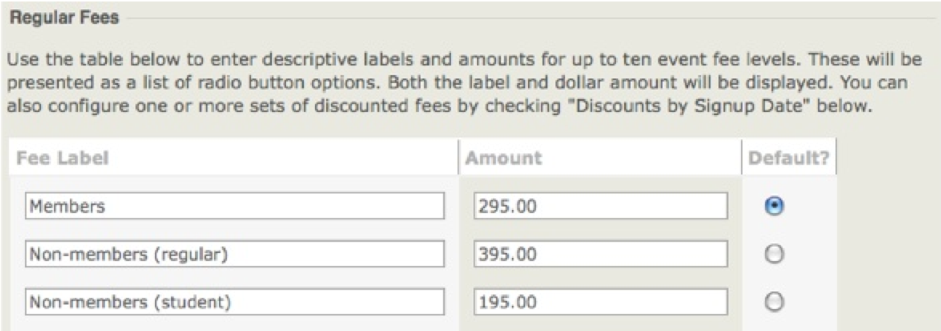
If you plan to accept credit card payments through the online registration form, you need to configure a **payment processor** prior to creating your event. Find more information about this, see *Payment Processors* in the *Contributions* section.

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.



Regular Fees provide a set of price levels from which the registrant must select a single level (e.g. an individual registration for $50 or a family registration for $100). Each fee amount has a label assigned and you can set a default fee.

This approach works well for many events and is easy to set up. Here's a simple example:



If your event requires a more complex pricing structure, with more options or additional add-ons, you may wish to use **price sets** or **discounts**. For more information about this, see the *Complex event fees* chapter in this section.

Online registration

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. If you do not need to offer online registration, do not check **Allow Online Registration** and move onto the next step. If you do want to allow online registration, please see the Online event registration chapter in this section.

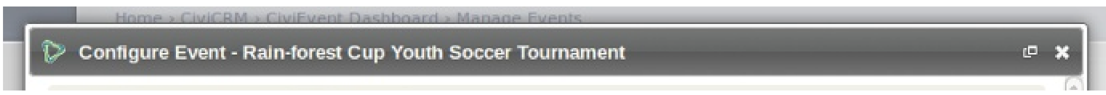
Scheduled reminders

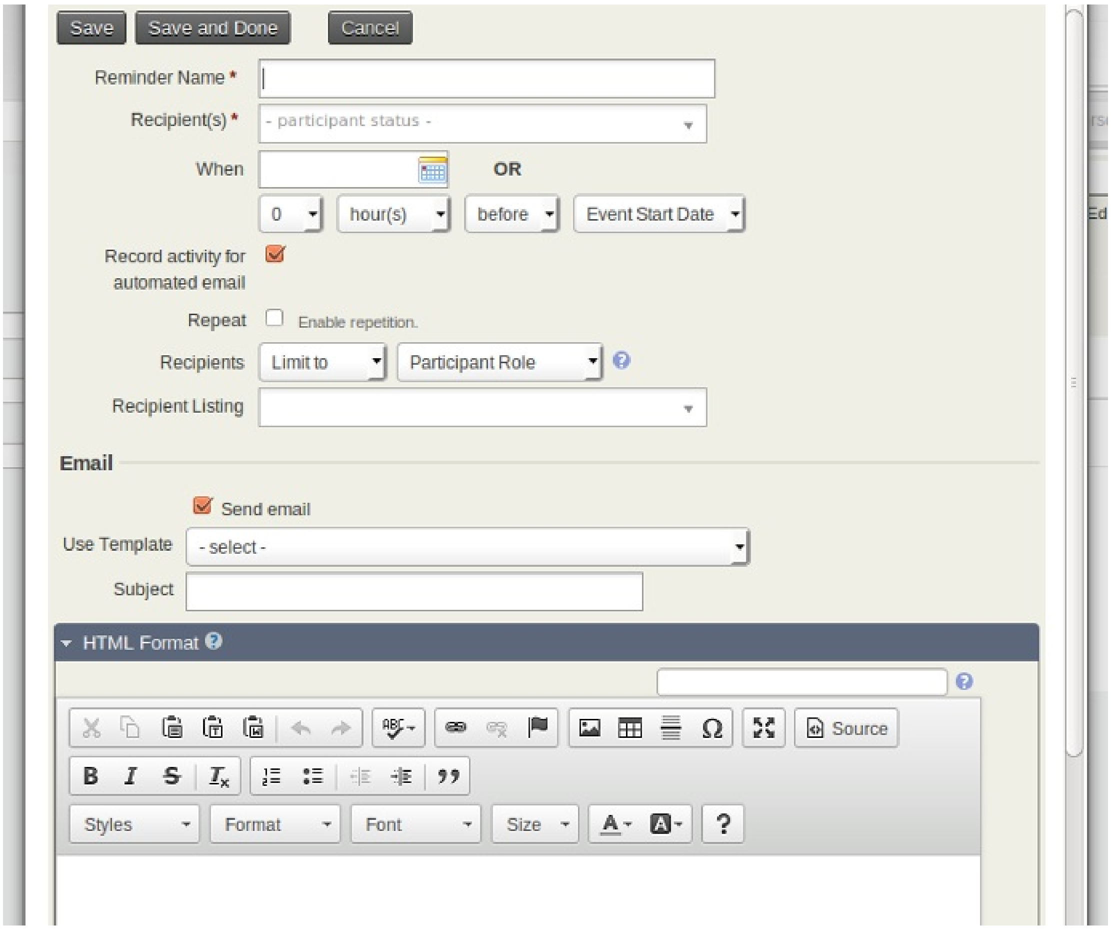
Scheduled reminders can be used to automatically send event registrants emails at certain times before or after events, for example

- a week before: remind them that they should check out the conference schedule
- a day after: ask them to fill in the feedback form
- Two days before payment is due for a Pending from Pay Later registration: warn them that their registration will be cancelled if they don't provide payment details in the next 48 hours.

To set up a scheduled reminder for a specific event, click on the scheduled reminders tab, which will show you already existing scheduled reminders for this event (if any) and click on **Add Reminder**.

Fill in the details on this form to send, for example, an email to all registered speakers 3 days before the event start date. Note that you can limit recipients by status (registered, attended, etc.) and also by role (speaker, attendee, volunteer, etc.). You can either use a template or compose your own message in the HTML format box.

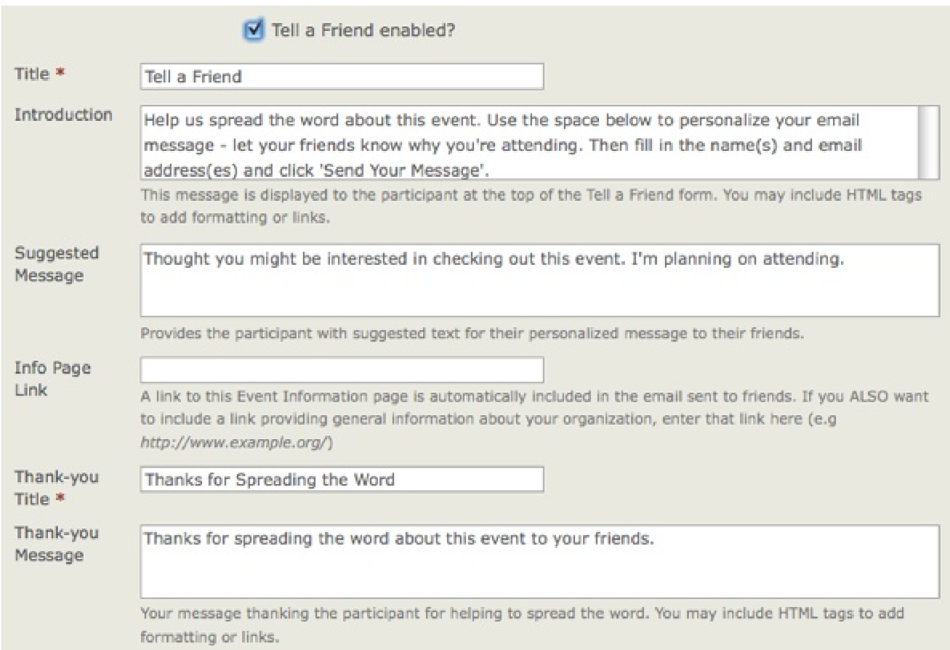




As well as setting up reminders on an event by event basis, you can also set them up for specific event types. and add them to specific event templates. The idea is basically the same as above, but you can access this functionality from **Administer > Communications > Scheduled reminders**.

Tell-A-Friend

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

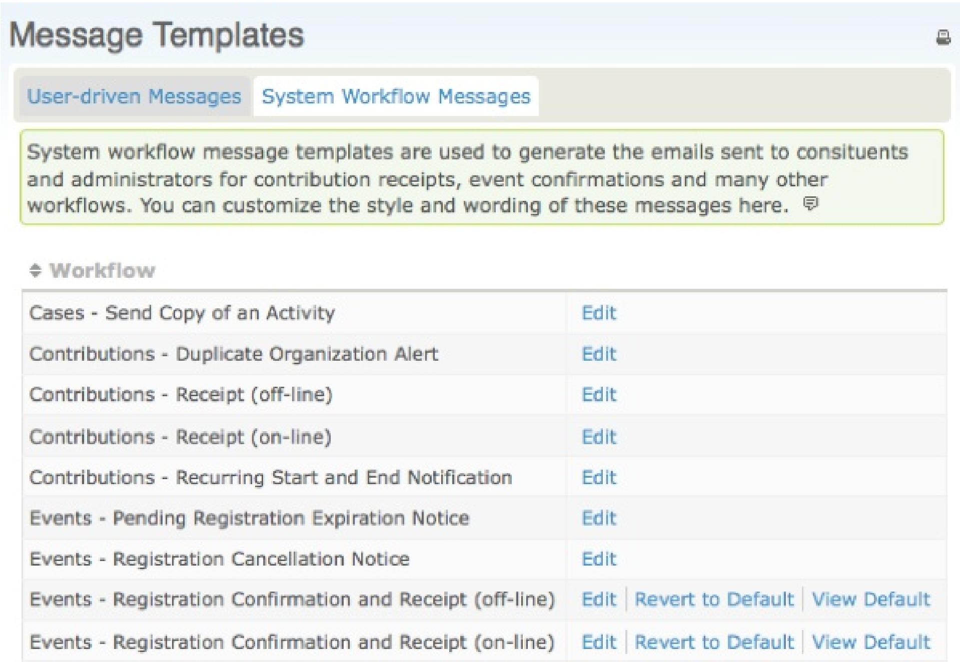


A "Tell a friend" activity record will be added to a participant's Activities tab each time she sends mail to her friends. This allows you to track your most active supporters and engage them further. The people who are emailed using this feature are also automatically added to CiviCRM as contacts.

Registration confirmation and receipting

You can send automated confirmation and receipt emails to participants who register for an event, whether they register online or are registered by your staff or volunteers. The content and layout of these emails are controlled by message templates. Both HTML and Text formats are provided. You can modify or add text to these emails, or add branding such as a logo to the HTML versions. To set up a from email address from which to send the confirmation and receipts, see Set-Up in the Email section.

Navigate to **Administer > Communications > Message Templates** (shown in the following screenshot) and click the **System Workflow Message** tab to see the list of messages you can modify. Click **Edit** next to "Events - Registration Confirmation and Receipt" rows to edit the content and layout.



The templates for these messages include both the text shown and necessary program logic. Use caution when editing so as not to modify the program logic. Be sure to test the workflow and review the emails sent after making any changes. If you find that your changes have caused problems, errors or missing information, you can always revert to the system default for that workflow.

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CiviCRM » Documentation

Online contributions

Creating Contribution Pages

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

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

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

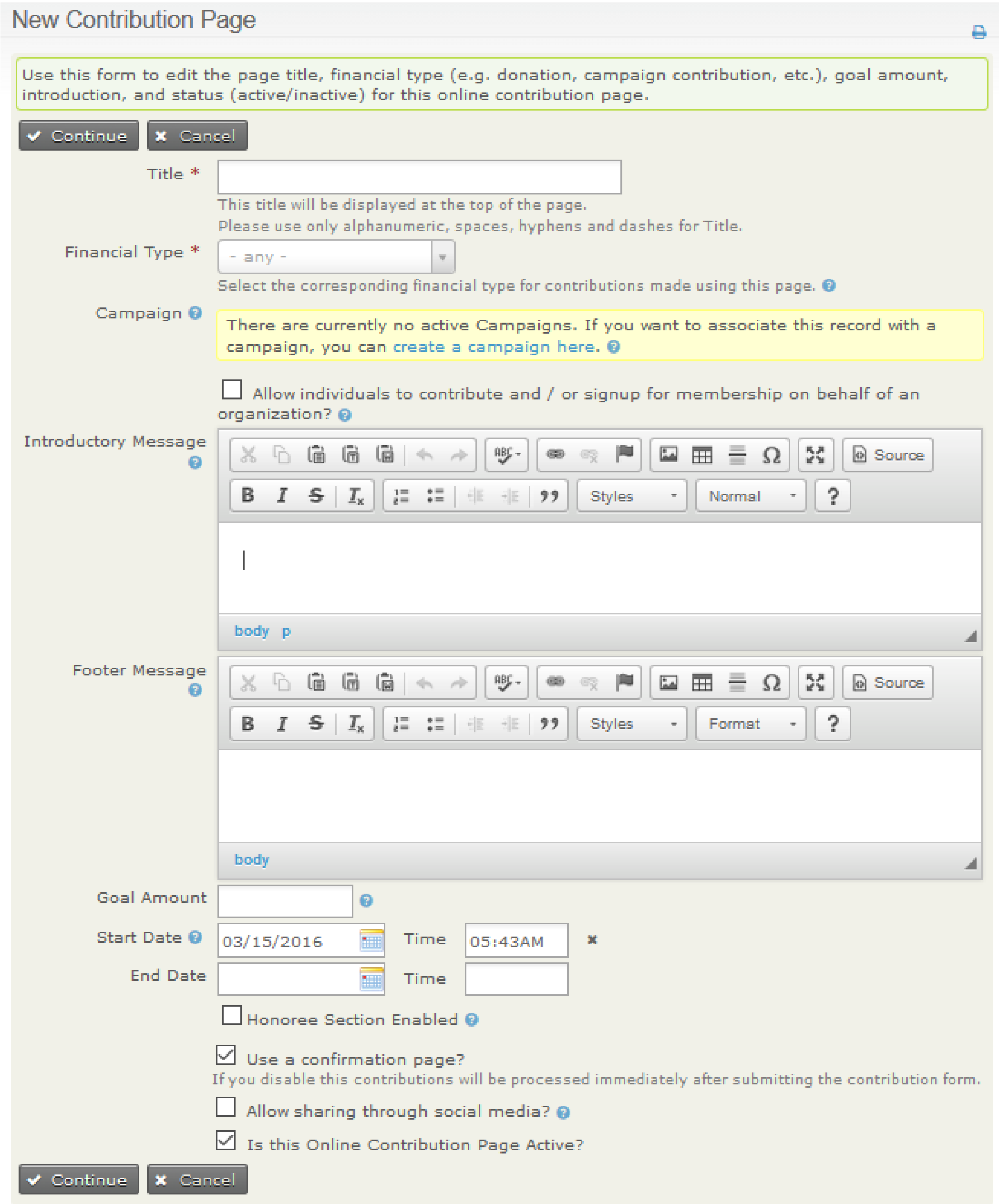
A very simple contribution page including receipt from your organisation

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

12. Click on **Save and Done**.
13. Follow the steps for your CMS to display this page on your website.

Setting up a contribution page - full details.

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

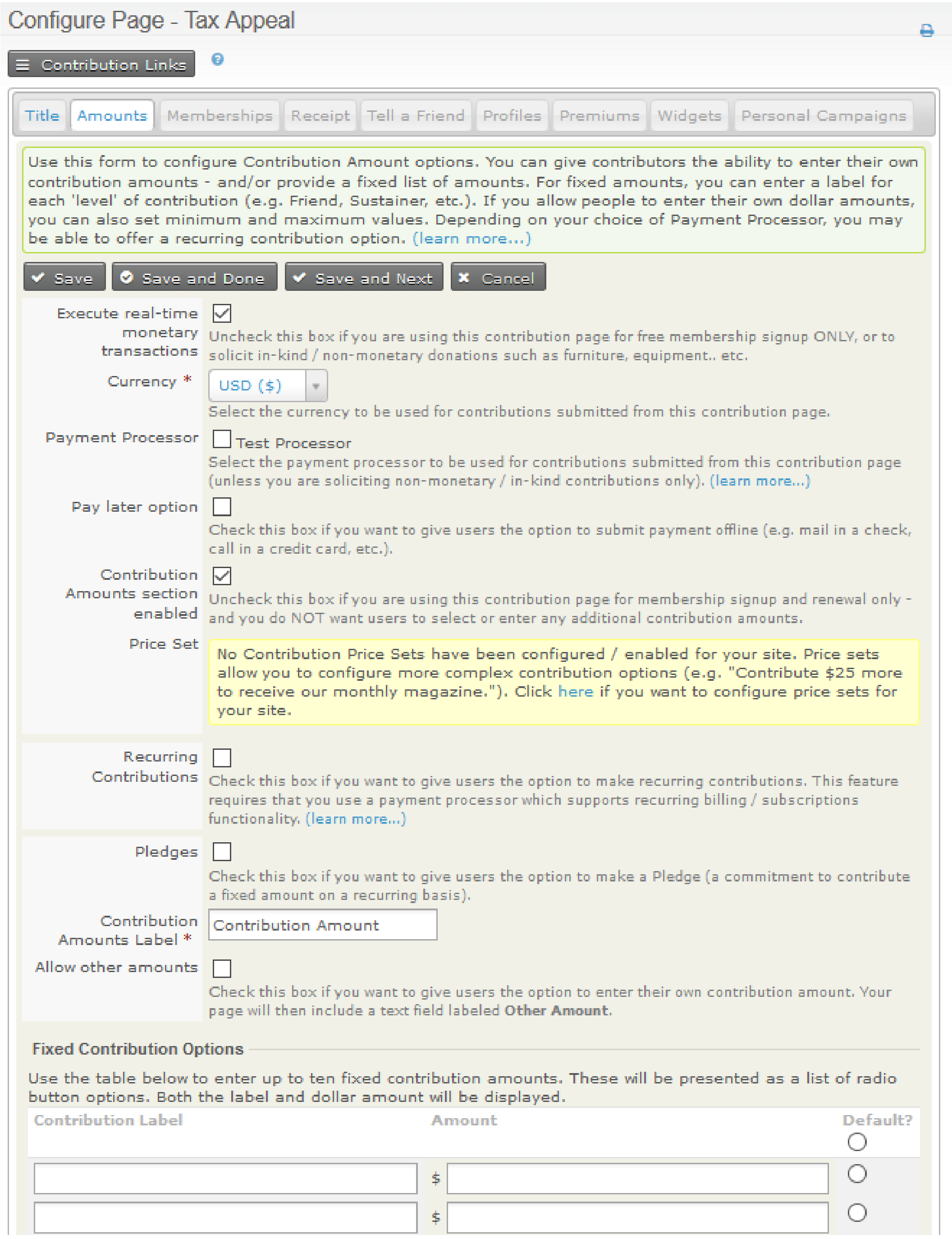


- The page title and financial type are the only compulsory fields. CiviCRM comes with four standard financial types, but you can create more to meet your organisation's accounting needs.
- Link this contribution page to a campaign. (optional)
- Compose your introductory message. (optional)
- Compose your footer message. (optional)
- Set a goal amount. (optional)
- This contribution page has to be manually enabled or disabled, but you can set a **start date** and **end date** that will apply for a Contribution Widget and Personal Campaign Pages. (optional)
- Choose whether or not to accept Honoree soft crediting.

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

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

Amounts tab



Configure Page - Tax Appeal

Contribution Links

Title | Amounts | Memberships | Receipt | Tell a Friend | Profiles | Premiums | Widgets | Personal Campaigns

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

Save | Save and Done | Save and Next | Cancel

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

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

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

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

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

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

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

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

Contribution Amounts Label * — Contribution Amount

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

Fixed Contribution Options

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

Contribution Label	Amount	Default?
	$	
	$	

- The **Execute real-time monetary transactions** box is checked by default. You would uncheck this box if you are using this contribution page for free membership signup or to solicit in-kind (non-monetary) donations, or when you want **all** users to submit their payments offline.

- Select the **Currency**.
- Select one or more previously configured Payment Processors for this page. Some organizations find it is a good idea to offer a choice of processors. You can do this by setting up multiple processors, and checking the corresponding boxes on this form.
- Check the **Pay Later** box if you want to give users the option to submit payment offline (e.g. mail in a cheque, call in a credit card, deposit directly into your bank account etc.). If you allow pay later contributions you will need to decide on a checkbox label to display to your users and the instructions for submitting these delayed payments.
- If you uncheck the **Contribution Amounts Section Enabled** the remaining fields on this page will vanish. You will only be able accept fixed-amount membership fees, or, if you configure a membership price set, fixed-amount memberships fees and other contributions as specified in the price set all charged in a **single** transaction.
- Select a pre-defined **Price Set** (for more complex payment options), OR enter up to 10 fixed contribution amounts in the table at the bottom of the page.)
- You can check **Recurring contributions** if you payment processor and its integration with CiviCRM support recurring billing and you want to allow this feature. (There are restrictions on recurring payments when membership fees are being paid.) If you check **Recurring contributions** further settings become visible.
- You can either set one frequency (e.g. a user can donate their chosen amount monthly) or allow for more user flexibility, where they can decide their own interval and/or number of installations (e.g. a user can donate their chosen amount once every three months for 12 installments).
- Check the **Pledges** box to give users the opportunity to pledge future payments.
- Decide on the label for the Contribution amount area on your page.
- Check **Allow other amounts** to give users the option to pay any amount they choose. You can set a minimum and a maximum amount for "Other Amount" contributions if you want to.
- Click **Save and Done**.

Memberships tab

This is covered in detail in Memberships.

Profile tab

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

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

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

- contact records
- contribution records

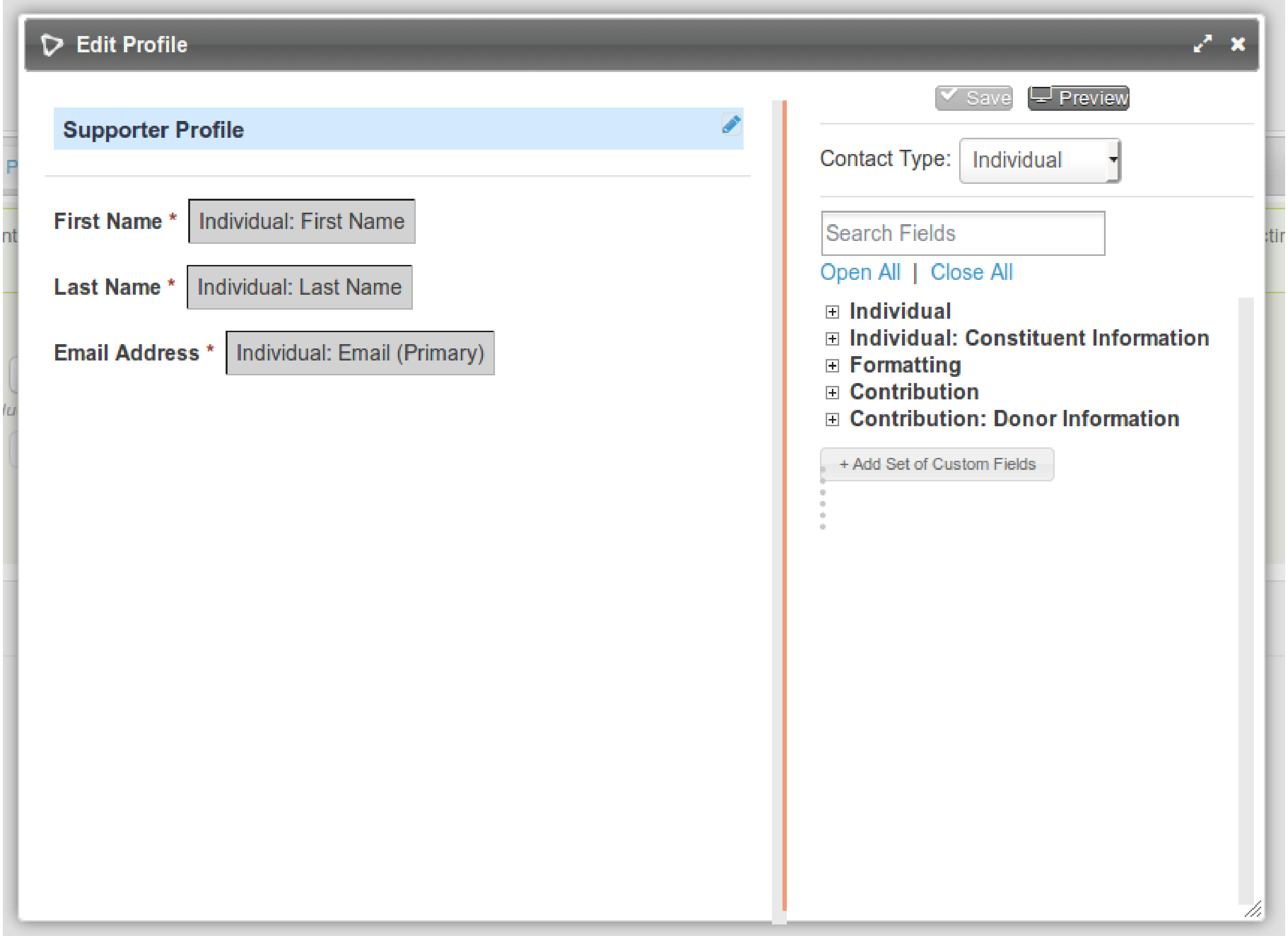
Profiles which include fields associated with any other record types will not be available for this purpose.

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

To add a profile to a contribution form:

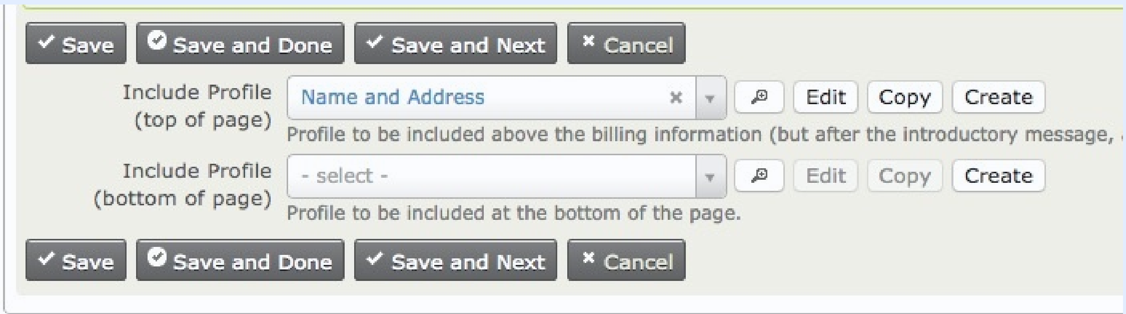
1. Navigate to Manage Contribution Pages then for the page you wish to configure, click on **Configure > Include Profiles**.

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



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

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

> **Multiple address blocks**
> Most payment processors add a set of address fields along with the payment details. These fields will be used to save a billing address.
>
> If you include a profile with address fields at the top of the page, CiviCRM automatically generates a checkbox on the contribution form which allows the user to indicate that their Billing Address is the same as the address entered in the profile. (If the profile is included at the bottom of the page, this checkbox will not be generated).
>
> 

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

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

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

For more information read Profiles.

Automatic Contribution Recording

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

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

Receipt Tab Thank-you and Receipting

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

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

Publicizing your contribution page

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

Menu item in Joomla!

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

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

Menu item in Drupal

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

Page or Post in WordPress

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

1. Login to the administration dashboard of your WordPress site.
2. Click on **Pages** or **Posts > Add New**
3. Click on the CiviCRM icon next to Upload / Insert
4. Select Contribution Page as your Frontend Element
5. Select the desired contribution page
6. Save the page or post, and your contribution page will automatically be embedded within your site's theme on that page.

"Pretty" URLs

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

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

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

www.myorganization.org/donate

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

Personalised Email

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

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

Next
Of...

Creating responsive emails using the Mosaico Extension in PowerBase

What is the Mosaico Extension?

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

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

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

Here is the link to the webinar recording for PowerBase online workshop on using Mosaico.

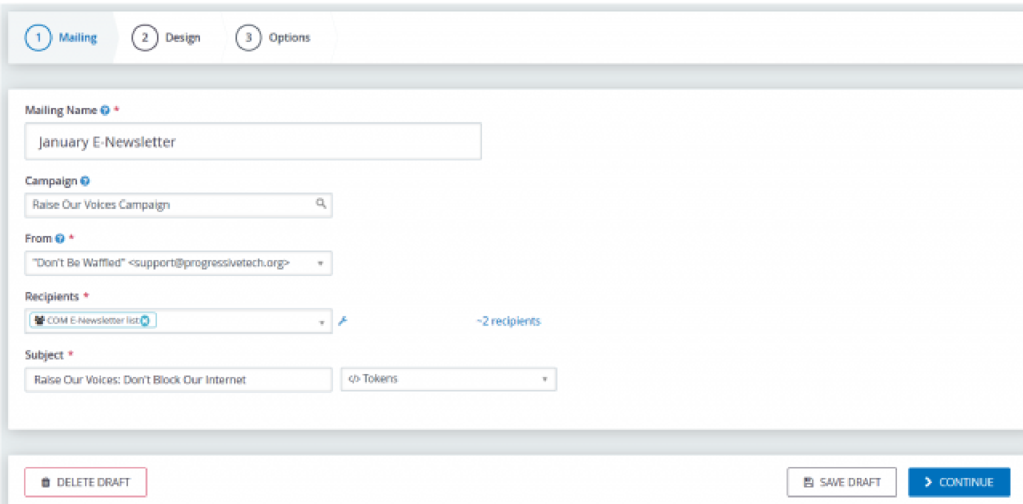
NOTE: Currently, we find that the Mosaico features work best with PowerBase when you are using Firefox as your browser.

To start using Mosaico Extension, the extension must be enabled once beforehand. If you have the proper permissions, you can go enable yourself, otherwise please email support and we will do it for you.

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

1. Initial Settings

Enter information about your Mailing:



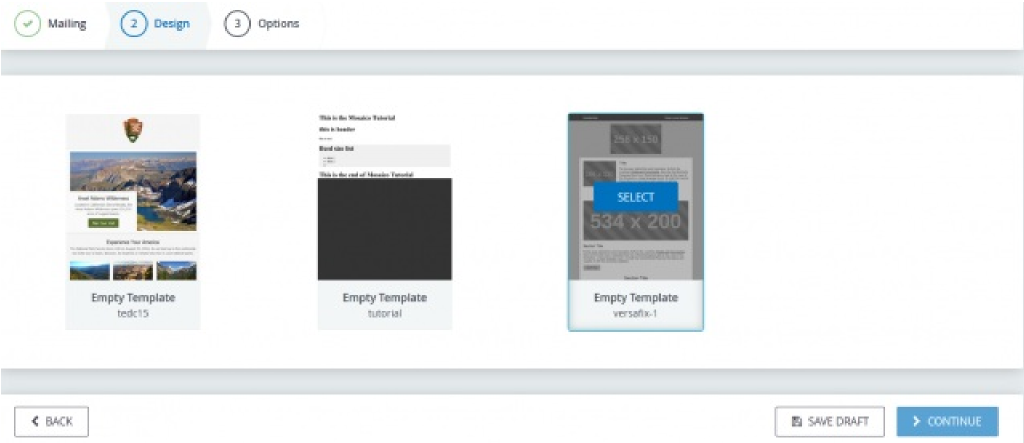
- Mailing Name (required): Enter a descriptive name for this mailing so you can locate it later
- Campaign Name (optional): select the campaign that is related to this mailing
- From (required): select the email that will be displayed as the Sender in the recipient's inbox
- Recipients (required): select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

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

2. Choose a template

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

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



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

3. Modify your template to create your mailing

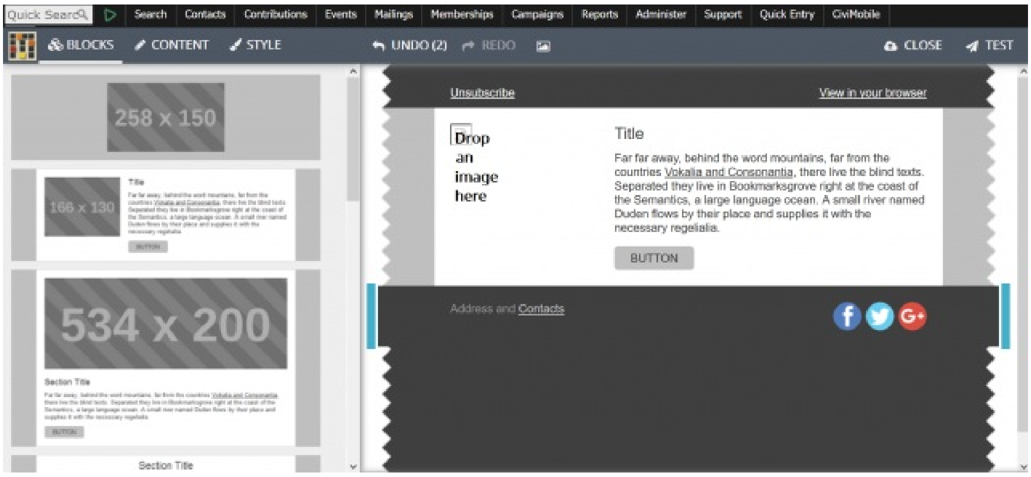
From the Block menu, you can drop and drag the blocks you want to use from the left side OR you can click on the ADD button (the button will appear when you hover your mouse over the block) to add the block onto your mailing "palette" to assemble the look you want for your email.

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

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

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

So our palette will look something like this:



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

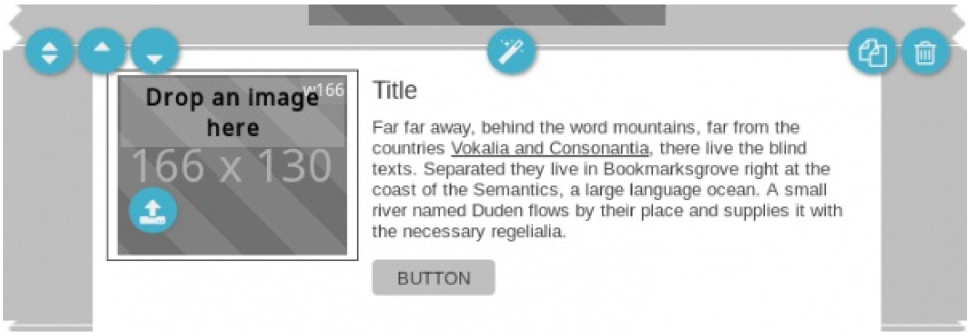
Editing a specific design block

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

Add an image

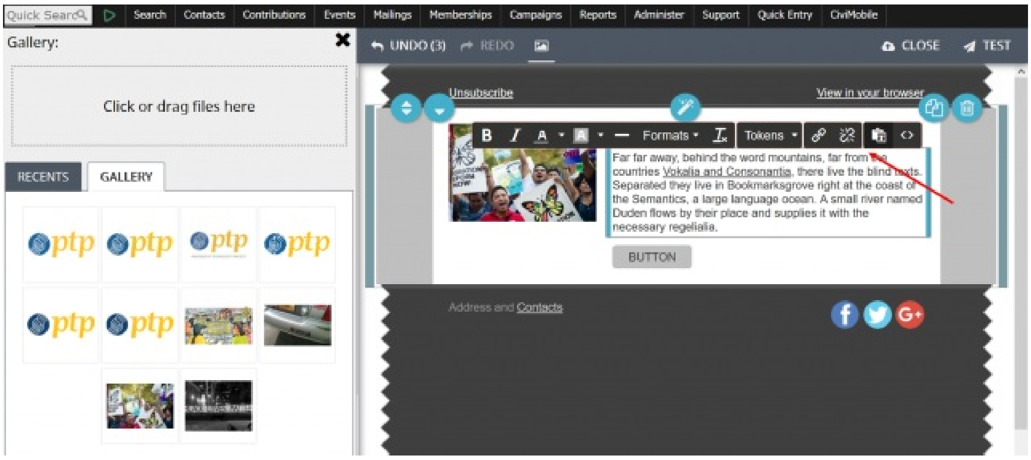
If your block has an area that says "Drop an image here" then it means you can add an image by either dragging one from your computer or clicking the blue upload icon.

TIP: You may find it easier to add an image by first clicking on the image area block you want to add, then go to the menu and click the "picture" icon, and it will open a GALLERY side box where you can upload an image or select an image to add. Just double click on the image and the image will added to the image area. This may cause less headaches if you're having issues with dropping and dragging the image.

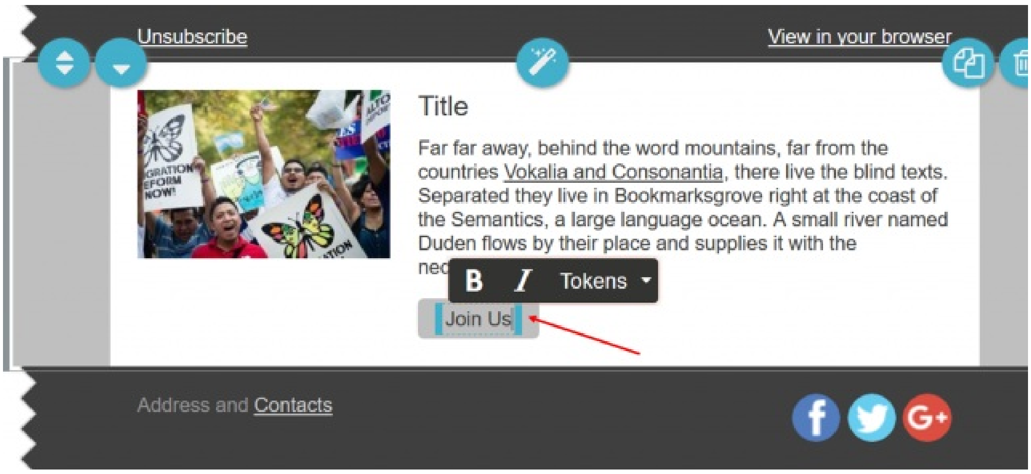


Add Text

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



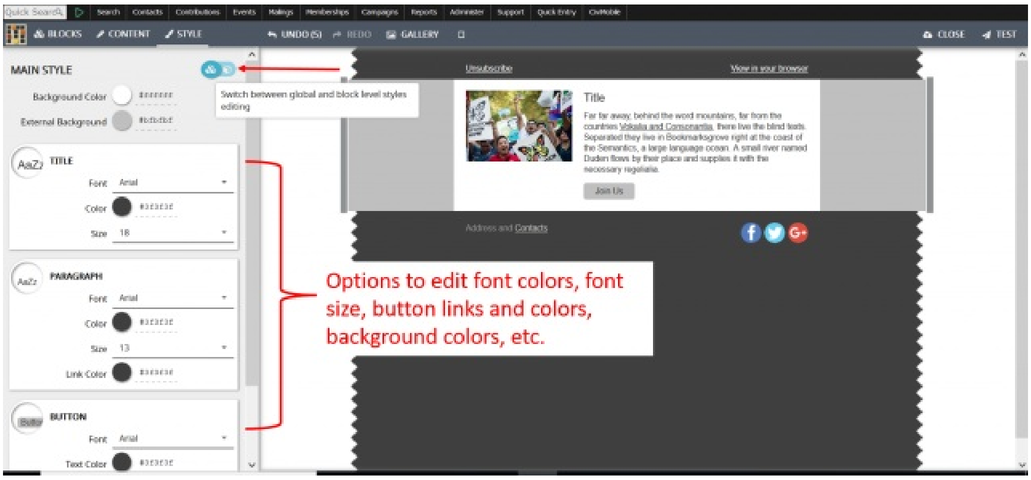
To edit text on buttons, just double click on the button, and you can enter the text and format the text. To configure the link for the button, use the Style menu as discussed below.



Change styles

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

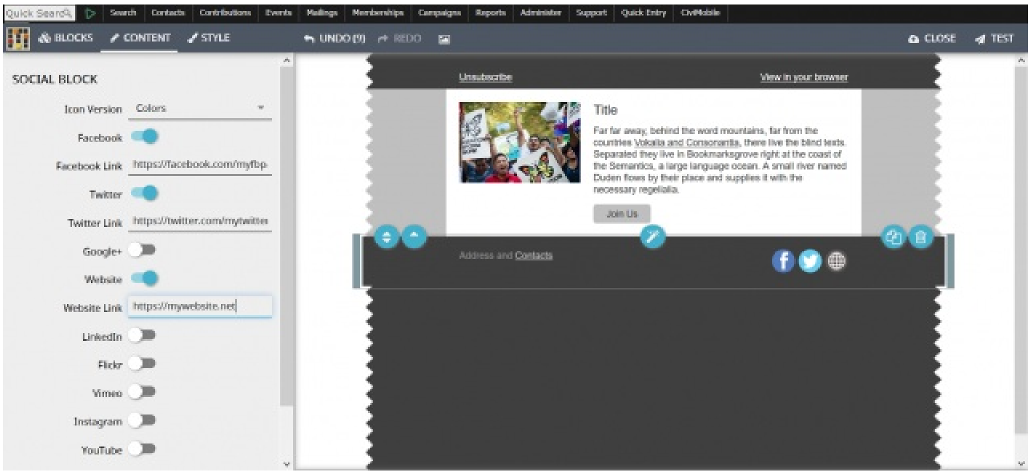
- You can edit the properties to change the colors for the background, external background, text, links for buttons and images, and more.
- You can select the font and size of your text
- From the Style menu you can also switch between applying the styles to a specific block or globally (all the blocks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



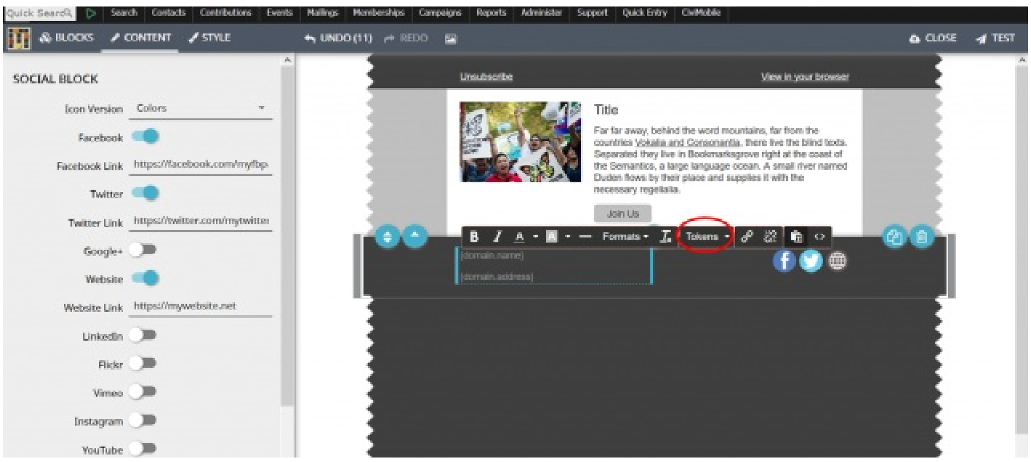
Change other settings

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

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

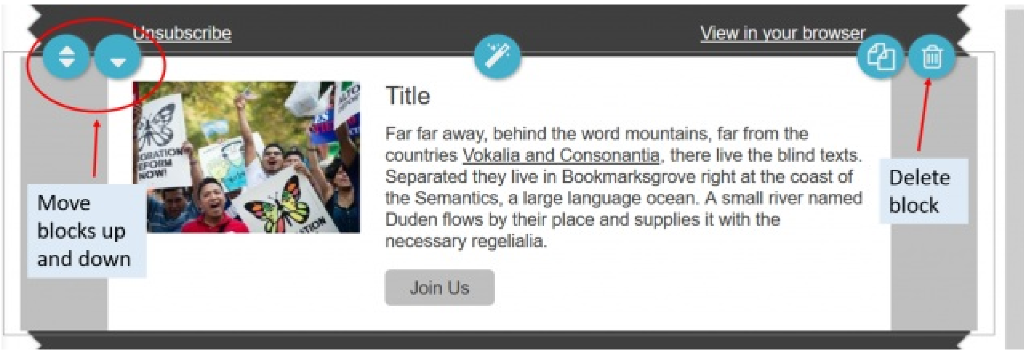


Adding Tokens by click in the text area where you want to display the tokens, and the format menu appears. Just click on TOKENS and select the tokens you want to add to email template.



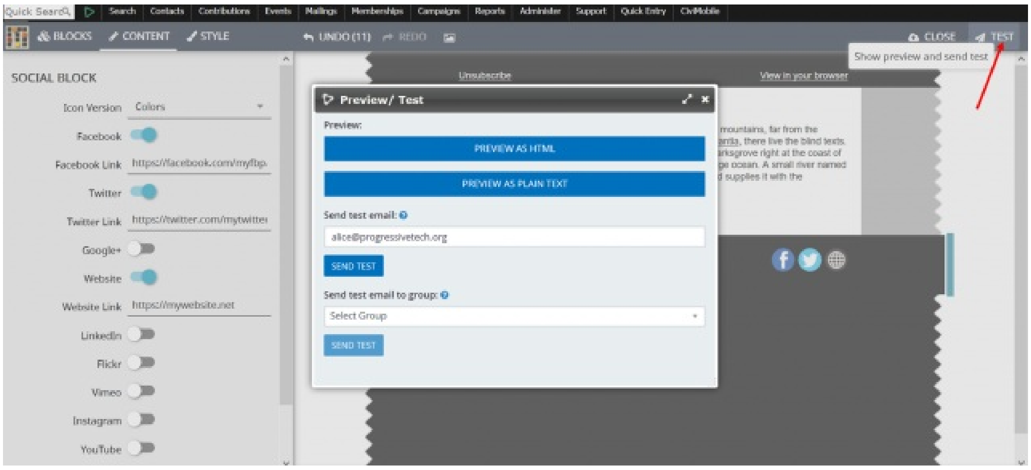
Moving blocks around

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



3. Testing Your Mailing

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



You can:

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

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

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

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

3. Other options

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

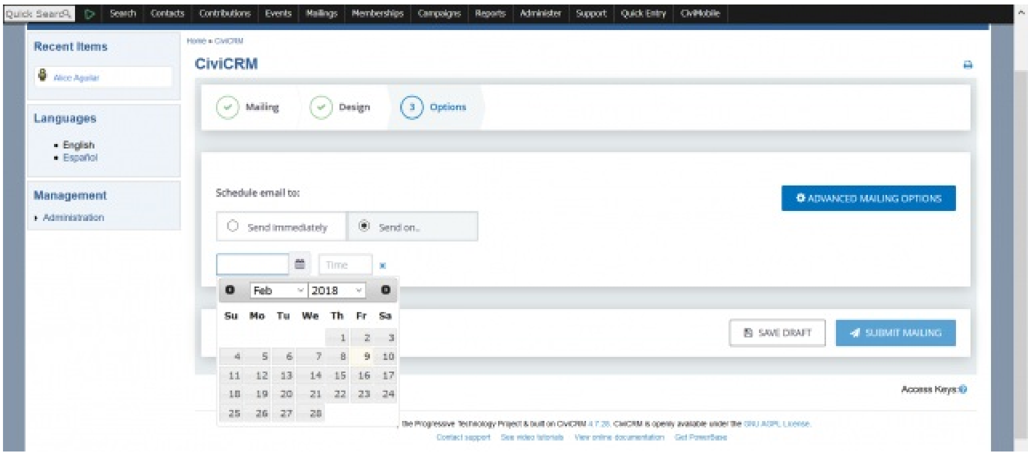
You can decide to configure Advanced Mailing Options for:

- Attachments
- Responses
- Tracking
- Publications

These options have the same functionality and settings as the traditional CiviCRM mailing options, which you can find more details in the CiviCRM book here.

4. Sending Your Mailing

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

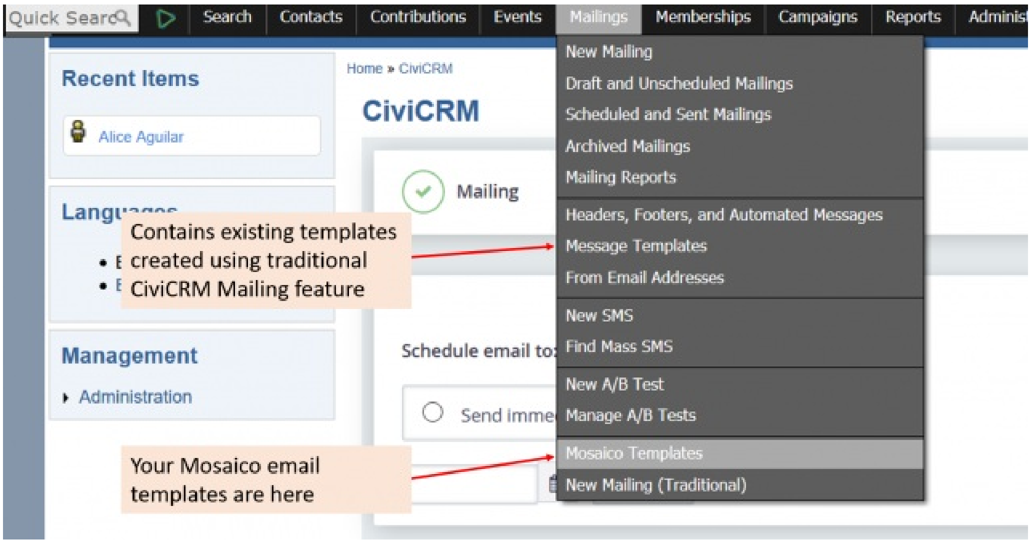


To schedule your mailing to be sent in the future select the option Send On, then select the date and time to schedule the mailing, and then click the Submit Mailing button.

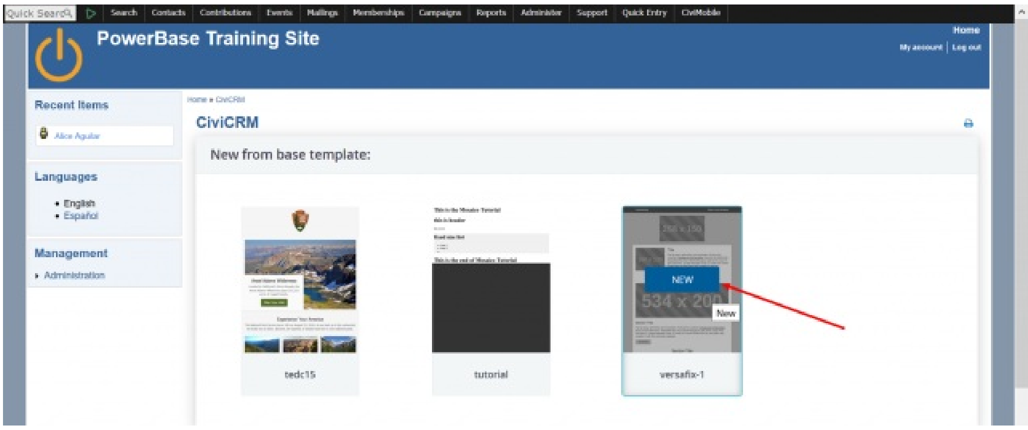
5. Creating Templates

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

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



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



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

Category:
Email and Postal Mailings
PowerBase - General

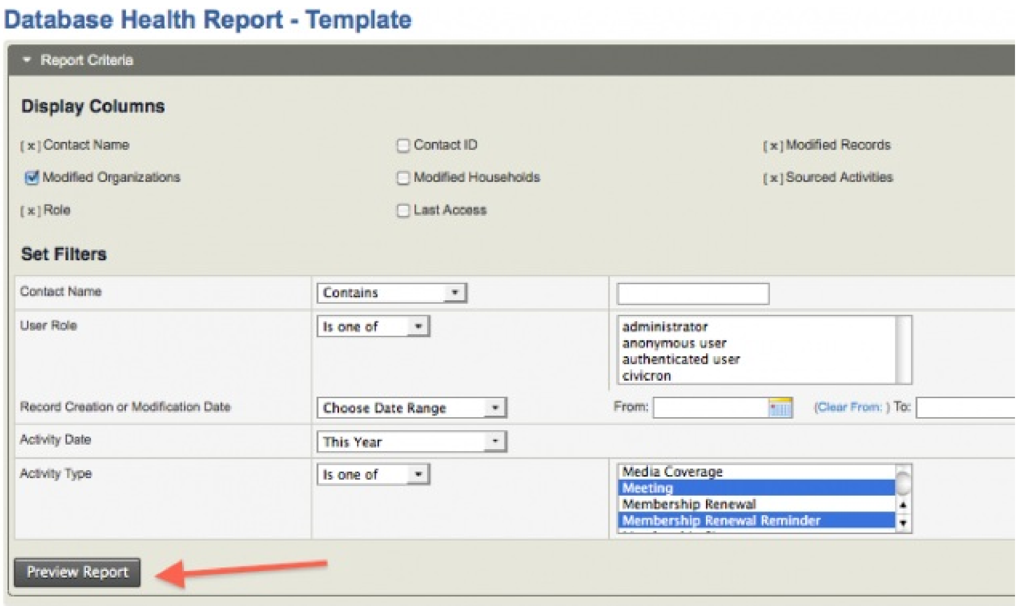
Adding a dashlet to your home page

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

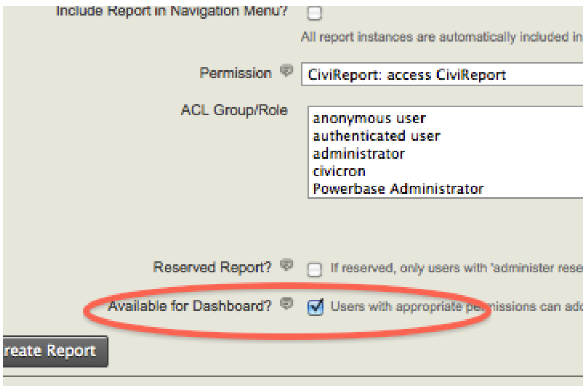
If there is data you want to have right at your fingertips each time you log in to PowerBase, create a report and enable it as a dashlet.

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

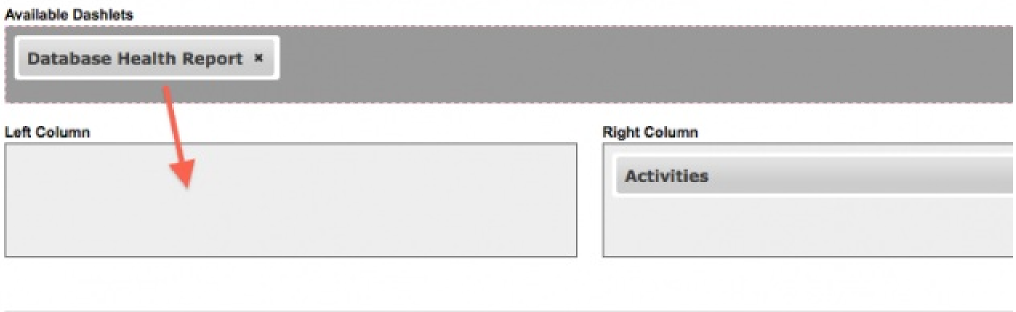
- Click Reports > Create Reports from Templates
- Select the report that you want to see on your dashboard.
- Choose the criteria you want to look at in your dashlet.*
- Click Preview Report.



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



- 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.

Read more about the dashboard and dashlets in the manual.

Category:
PowerBase - General

What You Need To Know

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

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

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

Key Concepts

Report templates

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

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

Report vs. Search

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

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

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

Report options

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

Detail vs summary reports

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

Key Questions

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

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

Set-up

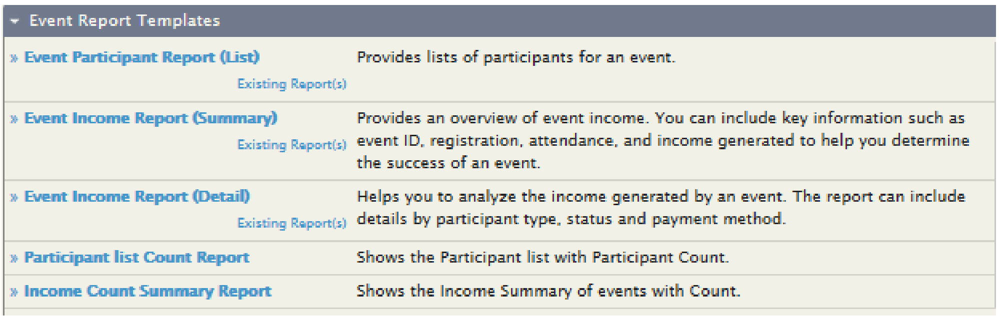
This section explains how to set up CiviReports. It assumes a basic understanding of why you would want to use CiviReport, and describes the workflow for creating a report from a template through to making these reports available for users. It also assumes that the report you require can be achieved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

If the report template you need does not exist you (or your developer) should refer to the documentation on creating custom reports in 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. You will not see the report settings tabs until you have previewed the report.

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 that will be displayed in your report. The tabs available will depend on the template you have selected with the most common being:

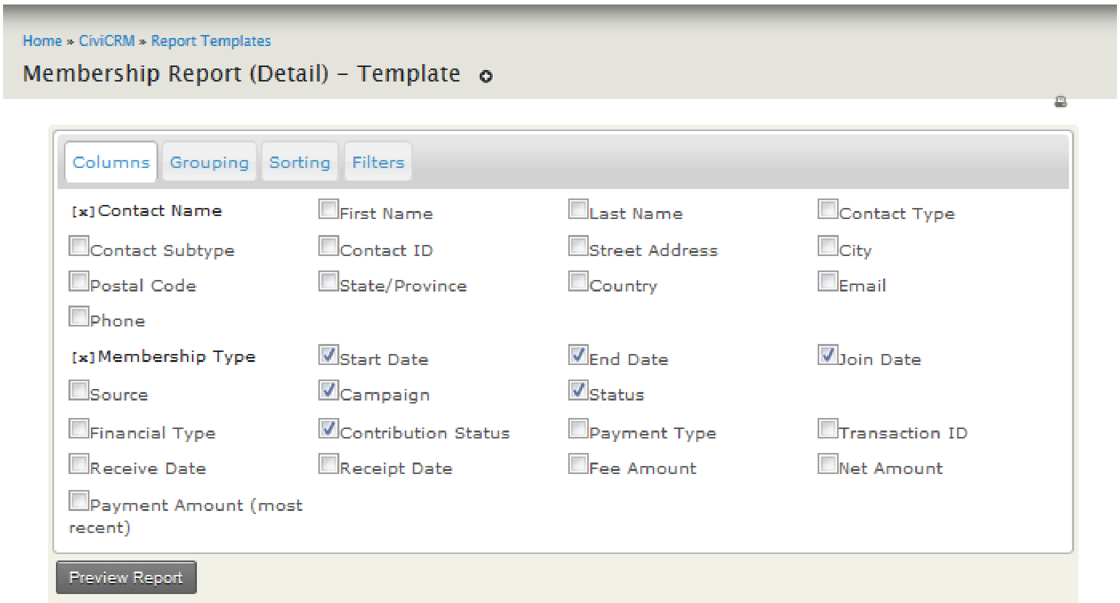
- **Columns** (all reports)
- **Grouping** (summary reports)

- **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

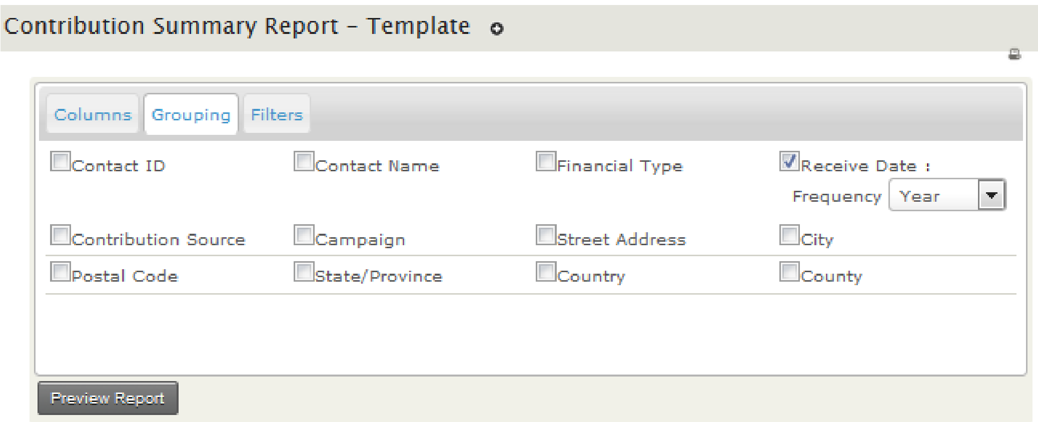
These check boxes allow you to select the data to be displayed for each record in your report. In most reports, at least one display column is *required* and cannot be unselected. For example in the membership detail report **Contact Name** and **Membership Type** are required fields.

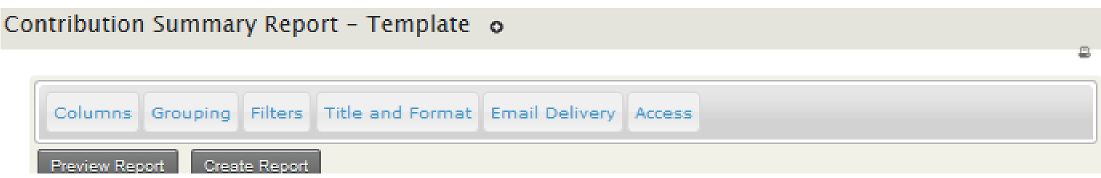


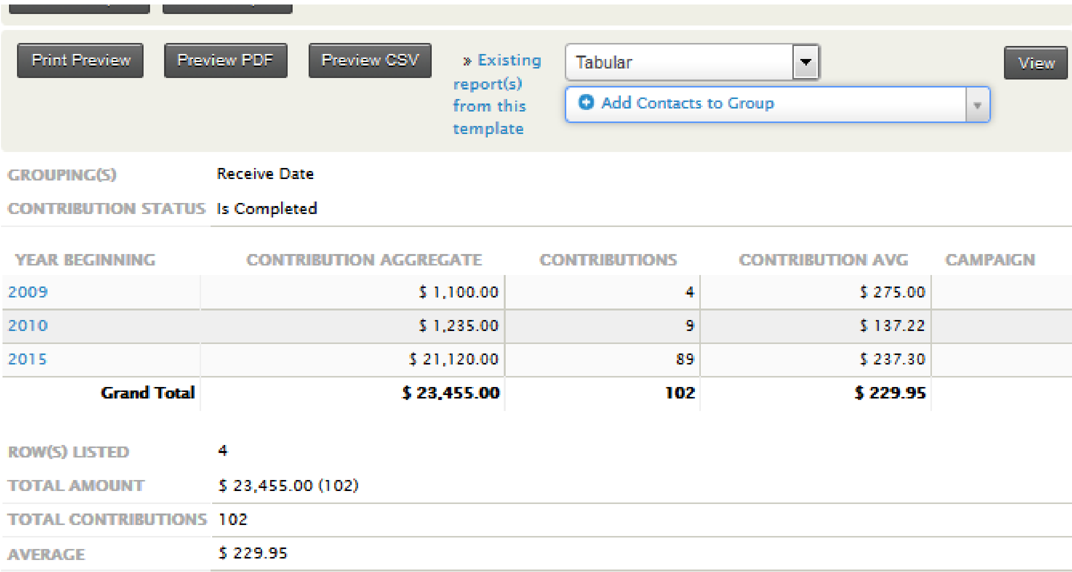
Grouping

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

For example you can choose to compare donations per year.





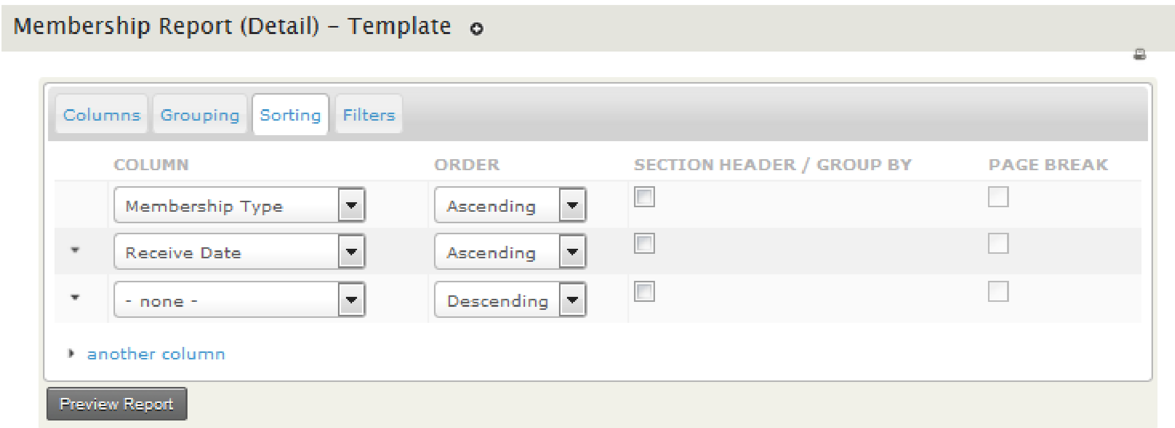


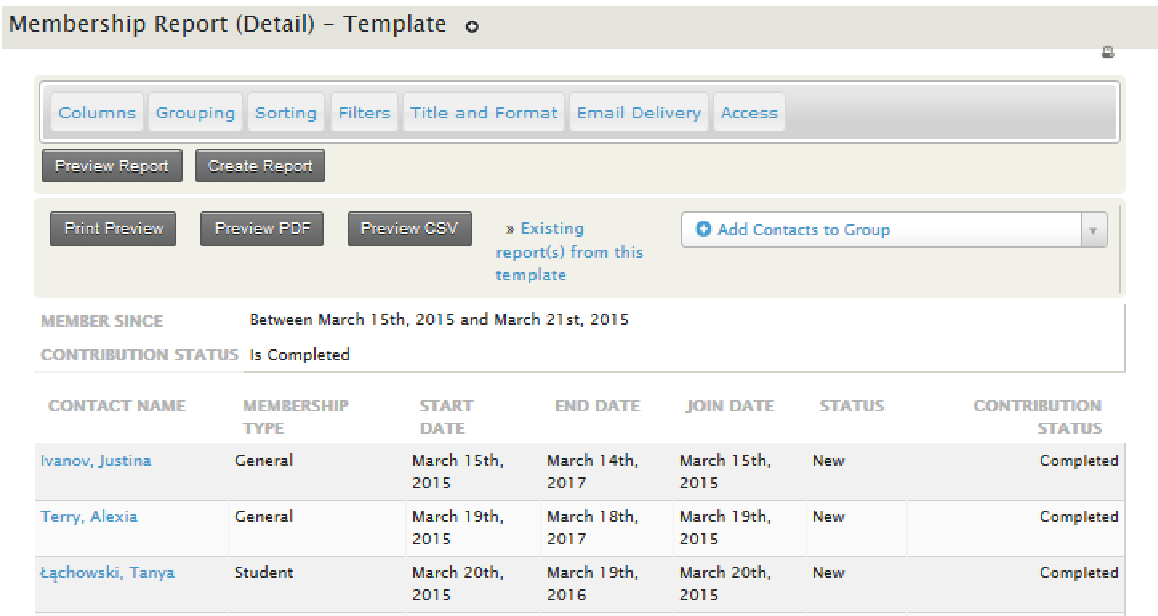
You can specify more than one grouping criteria. When you do this, results will be nested based on both groupings. Not all combinations of groupings will make sense for your data. You may need to spend time experimenting with Group By Columns to become familiar with this functionality.

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

Sorting

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





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

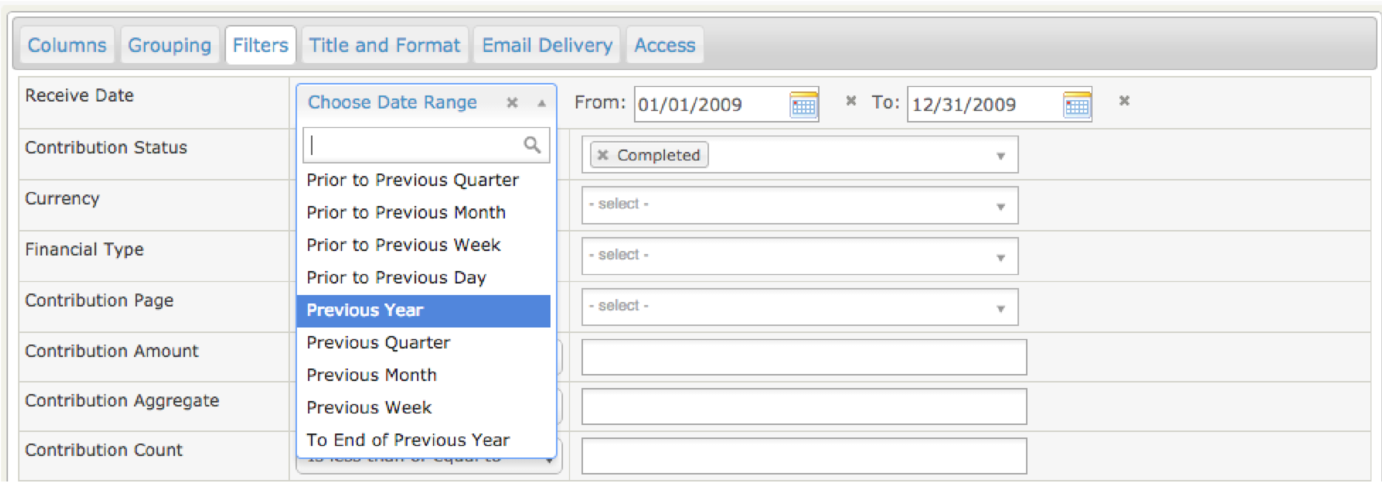
Filters

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".

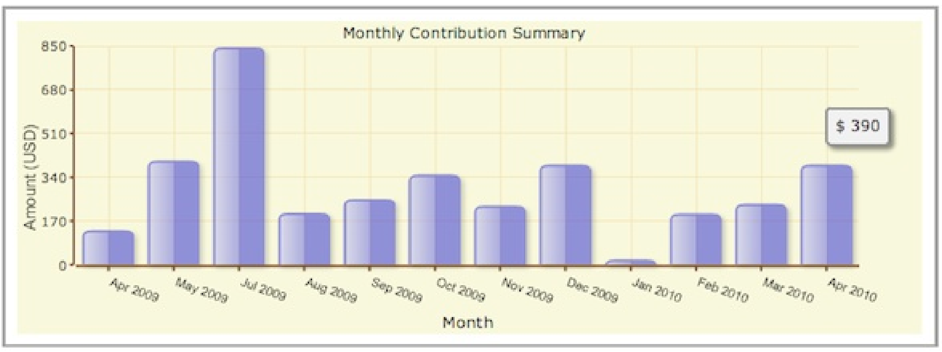


Relative date ranges are very useful for reports that you want to run on an ongoing basis for example:

- **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.

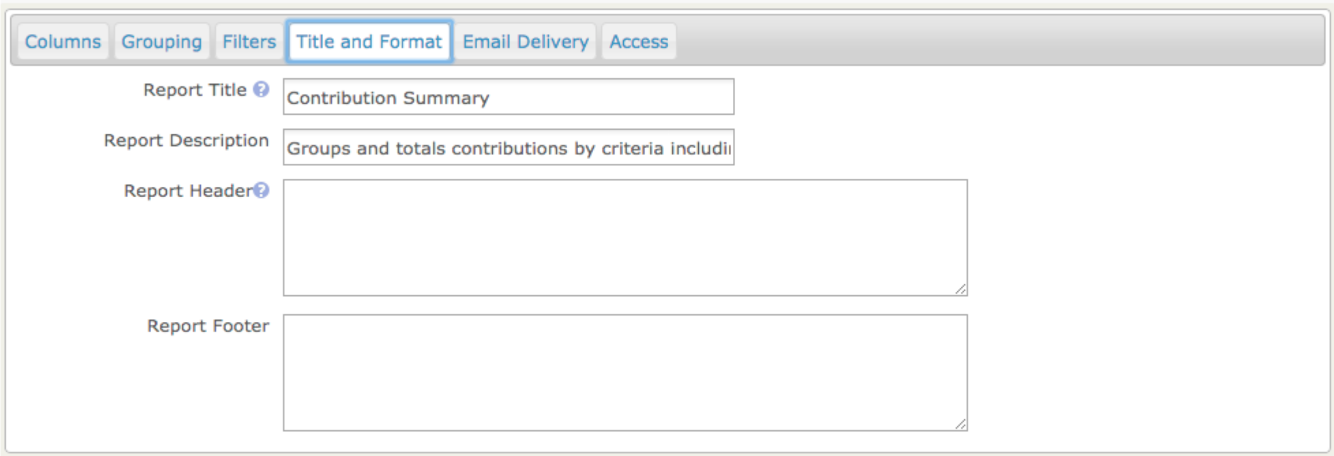


Once you have selected your report criteria, click **Preview Report**. (You will see that the tabs that define the report settings are now visible.) If the information displayed isn't exactly what you wanted, you can select the appropriate tab to modify your criteria. You may need to make several modifications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

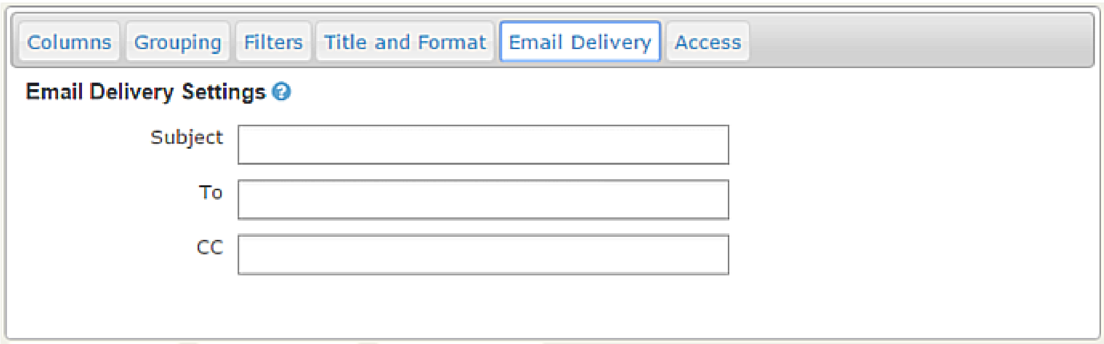
Define Report settings

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. (You will need to preview the report to make the settings tabs visible.)

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" between < title> and < /title>. You can include a logo be adding an < img> tag. You can also modify the look and feel of the printed report by including a custom CSS file (instead of print.css)

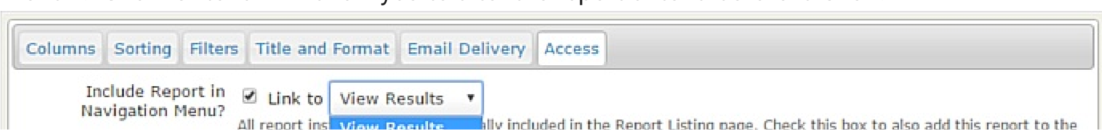


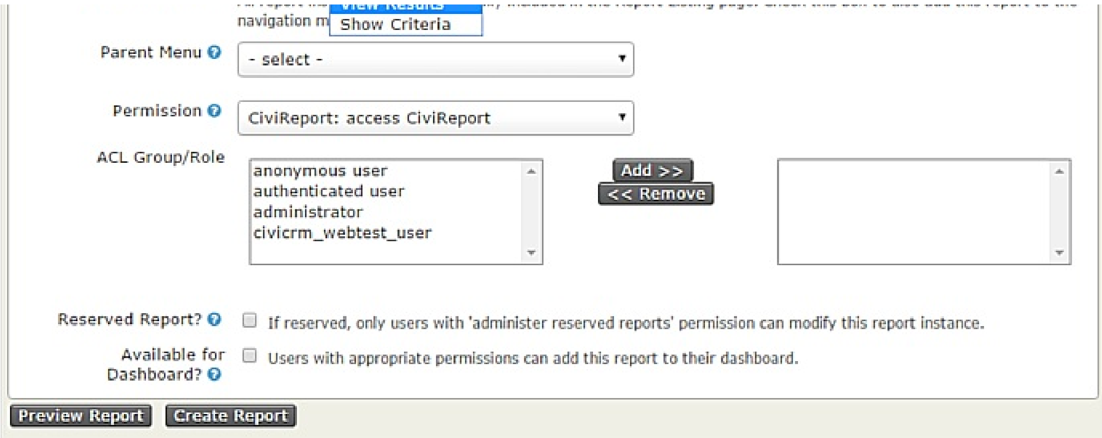
2. The **Email Delivery** tab contains the fields that will let you have report emailed to yourself or someone else on a regular basis. Fill in the Subject, To and CC fields in the Email Delivery Settings. You can enter one or more email addresses in the To and CC fields; multiple email addresses should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



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 Scheduled Jobs for more information.

3. All reports are included in **Report > Report listing**. On the **Access** tab, you can set if and where the report will appear elsewhere in the navigation menu. When you check **Include Report in Navigation Menu?** the Parent Menu field appears letting you select the parent menu for this second link to the report. The link to the report can either be to "View Results" or to "Show Criteria". "View Results" will open the report to the results page and would be the appropriate choice for, say, a report that uses a relative date filter such as "Number of new contributors last calendar month". "Show Criteria" will allow you to alter the report criteria before it is run.





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.

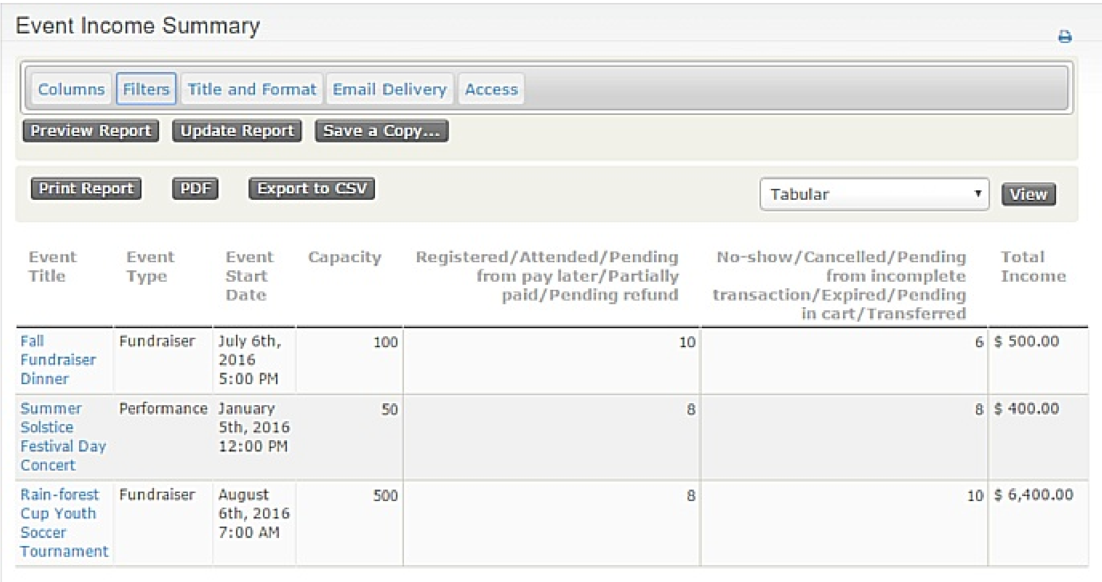
A **Reserved Report** can only be altered by someone with the **Administer Reserved Reports** permission.

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

Once the report criteria and settings are correct 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.

Editing or copying an existing report

Sometimes you need to permanently alter the criteria for an existing report. Open the report, make the required changes and then click **Update Report** to save them.



At other times you may want two or more reports displaying the same columns of information but using different filters. For example you may want an Event Income Summary report showing the income for all events for the events manager, but may only want the fundraising manager to have access to a report showing income from Fundraiser events. Once you have created the initial report you can open it, change the filtering criteria and click on **Save a Copy...**. You will be prompted to enter a new title and description for the new report.

CiviReport Permissions

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

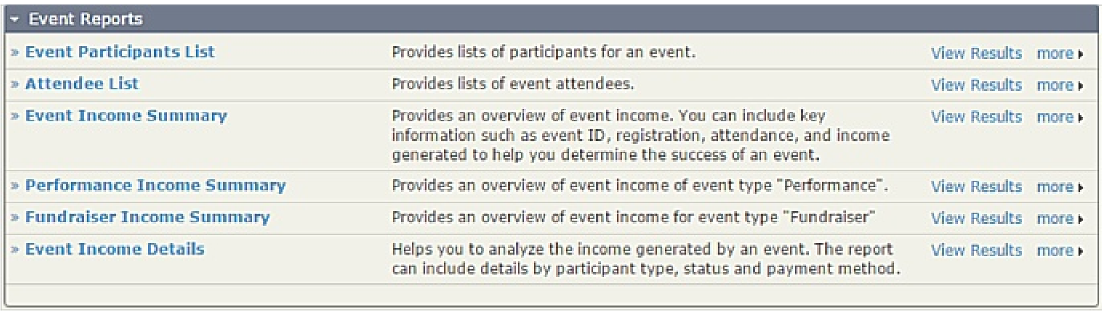
Everyday Tasks

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:

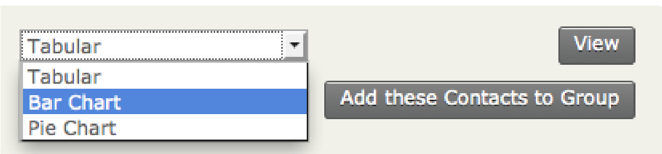
1. Go to **Reports**.
2. Select the relevant report type.
3. Identify the report you wish to view. Click on **View Results** to view the report results using the preset criteria. Click on the report name to go to the criteria settings.



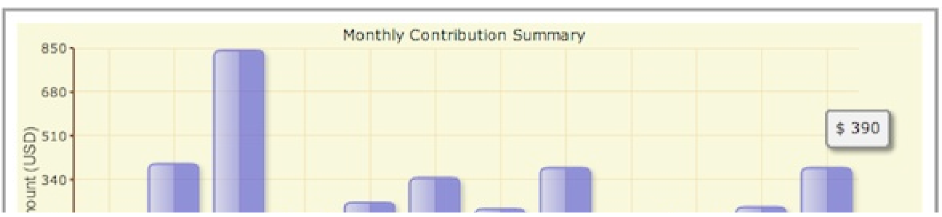
Event Reports		
» Event Participants List	Provides lists of participants for an event.	View Results more ▸
» Attendee List	Provides lists of event attendees.	View Results more ▸
» Event Income Summary	Provides an overview of event income. You can include key information such as event ID, registration, attendance, and income generated to help you determine the success of an event.	View Results more ▸
» Performance Income Summary	Provides an overview of event income of event type "Performance".	View Results more ▸
» Fundraiser Income Summary	Provides an overview of event income for event type "Fundraiser"	View Results more ▸
» Event Income Details	Helps you to analyze the income generated by an event. The report can include details by participant type, status and payment method.	View Results more ▸

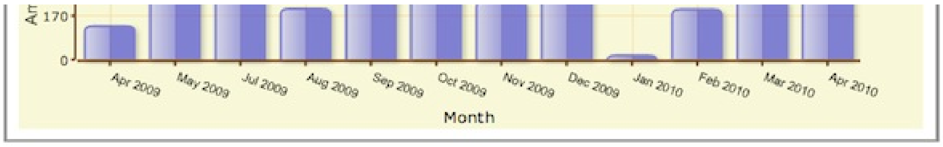
Reports can also be configured to be directly accessible from navigation menus. For example, an event report can be configured to appear in the **Events** menu.

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



The appropriate report should then be displayed.





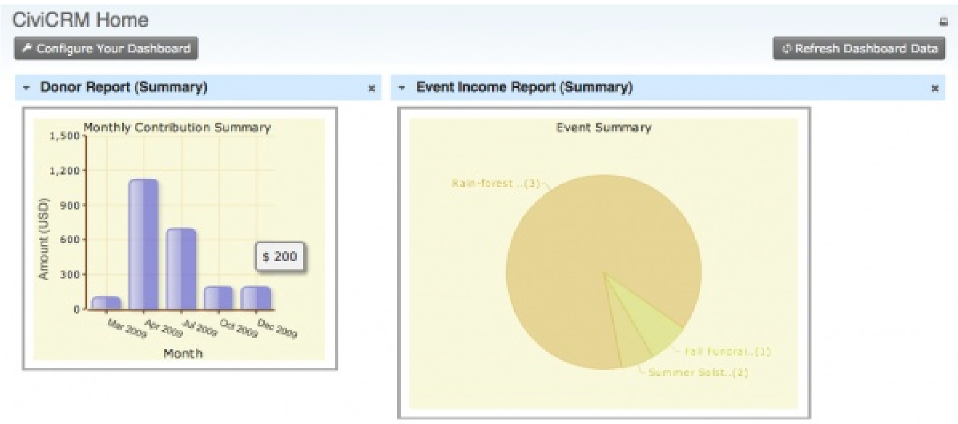
As well as viewing reports on screen you can create a PDF version of either tables or graphs, suitable for printing or emailing.

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

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

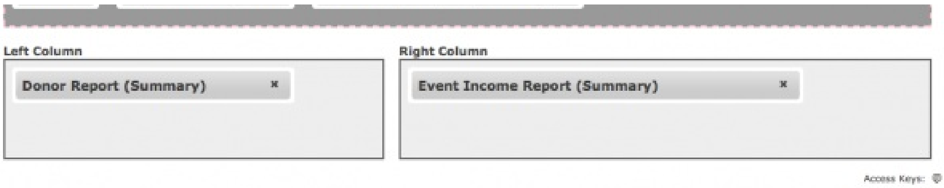
Reports on your dashboard

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.