

2007

# CiviCRM Administrator User Manual



Produced by BIS 412

The Collaboratory

5/10/2007

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## **General Civi Background and Information**

“CiviCRM is the first open source and freely downloadable constituent relationship management solution. CiviCRM is web-based, open source, internationalized, and designed specifically to meet the needs of advocacy, non-profit and non-governmental groups.

CiviCRM is a powerful contact, fundraising and eCRM system that allows you to record and manage information about your various constituents including volunteers, activists, donors, employees, clients, vendors, etc. Track and execute donations, transactions, conversations, events or any type of correspondence with each constituent and store it all in one, easily accessible and manageable source.

CiviCRM is created by an open source community coordinated by CiviCRM LLC, and the 501c3 non-profit Social Source Foundation. “

<http://civicrm.org/aboutcivicrm>

## **CiviCRM Wiki and Forum**

While we will document CiviCRM as customized for The Collaboratory extensively in this and other appropriate user guides, it is possible that the answer you seek will not be found in our documentation. Should this happen, there is a CiviCRM wiki where you can search for your answer. On the wiki, CiviCRM and its components are described in great detail and is quite organized. If the answer cannot be found on the wiki, there is also a CiviCRM forum available to you on the website. There is a large community of CiviCRM users and this is a great place to ask any questions that might arise and to which you are not able to find an answer in our user’s guides or the wiki. On top of these features, the CiviCRM website contains a FAQ as well as a blog which might be useful for things such as knowing when to update and what new functionality might be available.

Wiki - <http://wiki.civicrm.org/confluence/display/CRM/Home>

Forum - <http://forum.civicrm.org/>

FAQ - <http://wiki.civicrm.org/confluence/display/CRMDOC/FAQ>

Blog - <http://civicrm.org/blog/>

## **Administrator Specific Notes**

The administrator role as defined in the CiviCRM system will be The Collaboratory manager. The person serving in this role will need to be able to perform all of the tasks outlined in this user manual. The Collaboratory manager will be the owner of the CiviCRM system. There is an online administrator's guide which can be used as an additional resource should the administrator come across something that is not specifically discussed in this manual.

CiviCRM Administrator's Guide - <http://wiki.civicrm.org/confluence/display/CRM/Administrator+Guide>

## **Use Cases and Step by Step Instructions**

The following sections of this manual will contain step by step instructions for performing the functions required of an administrator. They will be broken down by the three modules contained within CiviCRM – CiviMember, CiviContribute, and CiviMail – for organizational purposes.

## **Login Instructions**

1. Go to <http://bis412.selfip.com/dru5/> and login as an administrator.
2. Click 'CiviCRM' link on the left.

## **CiviMember Instructions**

CiviMember provides “flexible membership management.” It allows you to track Collaboratory members and put them in groups and site teams.

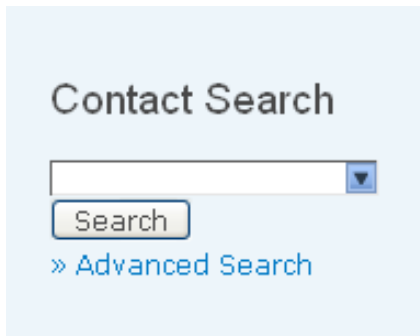
About CiviMember - <http://civicrm.org/civimember>

CiviMember Guide - <http://wiki.civicrm.org/confluence/display/CRM/CiviMember+Guide>

## **1. Newsletters/Communication**

### **1.1 Edit prayer list tags for a contact**

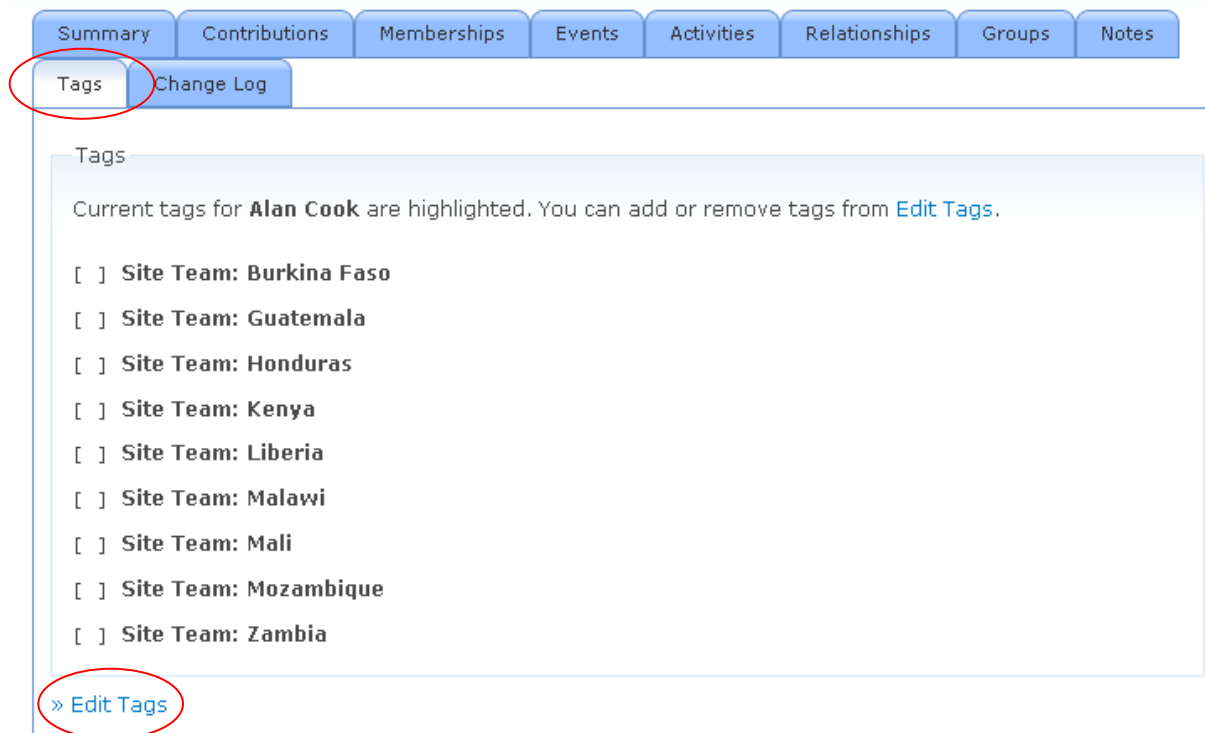
1. Login
2. Perform a search for desired member/partner



**Contact Search**

[» Advanced Search](#)

3. Select the individual to edit.
4. Select the 'Tags' tab followed by the 'Edit Tags' link at the bottom of the page.



Summary Contributions Memberships Events Activities Relationships Groups Notes

Tags Change Log

Tags

Current tags for **Alan Cook** are highlighted. You can add or remove tags from [Edit Tags](#).

- ☐ Site Team: Burkina Faso
- ☐ Site Team: Guatemala
- ☐ Site Team: Honduras
- ☐ Site Team: Kenya
- ☐ Site Team: Liberia
- ☐ Site Team: Malawi
- ☐ Site Team: Mali
- ☐ Site Team: Mozambique
- ☐ Site Team: Zambia

[» Edit Tags](#)

5. Select the prayer lists with which the individual wishes to be associated with.

## 2. Calendar

### 2.1 Create/delete service trips






1. Login
2. Click 'CiviEvent' link on left menu.

## CiviCRM

- ▣ [CiviCRM Home](#)
- ▣ [Find Contacts](#)
- ▣ [Manage Groups](#)
- [Import](#)
- [CiviContribute](#)
- [CiviMail](#)
- [CiviMember](#)
- ▼ [CiviEvent](#)
  - ▣ [Find Participants](#)
  - ▣ [Import Participants](#)
- ▣ [Administer CiviCRM](#)

3. Click on the link at the top, center of the page to manage your events

## CiviEvent

**Recently Viewed:**
 Alan Cook
  Dean Eastlake
  Jay Bennett
  Valerian Curd
  robdwilk@gmail.com

CiviEvent allows you to create customized page(s) for creating and registering online events. Administrators can create or modify your Online Events Pages from [here](#).

You can also input and track offline Events. To enter events manually for individual contacts, use [Find Contacts](#) to locate the contact. Then click **View** to go to their summary page and click on the **New Event** link. You can also [import batches of offline participants](#) from other sources.

---

### Event Summary

This table provides a summary of up to ten scheduled and recent **Events**. Click the **Event name** to view the event as it

4. From this screen you have the ability to:

- Show Past Events
- Configure Upcoming Events
- Create New Events
  - Follow steps 1-4 listed on the web page



## Manage Events

**Recently Viewed:** Alan Cook Dean Eastlake Jay Bennett Valerian Curd robdwilk@gmail.com

This page lists current (in-progress) and upcoming events. Click a column header to sort by that column. [Click here](#) to browse completed (past) events ([read more...](#)).

[» New Event](#)
[» Browse iCalendar Listing](#)
[» Download iCalendar File](#)

Event	City	State/Province	Public?	Starts	Ends	Active?	
CiviCRM Training (ID: 1)	Grantham	Pennsylvania	No	May 10th, 2007 1:30 PM	May 10th, 2007 3:30 PM	Yes	<a href="#">Configure</a>   <a href="#">Test-drive</a>   <a href="#">Live Page</a>   <a href="#">Disable</a>   <a href="#">Delete</a>   <a href="#">Copy Event</a>

[» Show Past Events](#)

## 3. Application Groups

### 3.1 Create/delete application group or site team

1. Login
2. Click 'Manage Groups' link on left menu.

**CiviCRM**

- ▣ [CiviCRM Home](#)
- ▣ [Find Contacts](#)
- ▣ [Manage Groups](#)
- ▶ [Import](#)
- ▶ [CiviContribute](#)
- ▶ [CiviMail](#)
- ▶ [CiviMember](#)
- ▶ [CiviEvent](#)
- ▣ [Administer CiviCRM](#)

3. Scroll to the bottom of the page and click 'New Group'

Site Team: Mozambique	User and User Admin Only	<a href="#">Members</a>   <a href="#">Settings</a>   <a href="#">Disable</a>   <a href="#">Delete</a>
Site Team: Zambia	User and User Admin Only	<a href="#">Members</a>   <a href="#">Settings</a>   <a href="#">Disable</a>   <a href="#">Delete</a>

[» New Group](#)

4. Type in "Site Team: *Destination*" ("Group: *Group Name*" for an application group) where in the 'Name' text box where *Destination* is replaced by the actually site team destination.

**Group Settings**

**Name: \***

5. Select “Public User Pages and Listings” in the ‘Visibility’ dropdown.

Group Settings

**Name: \***

**Description:**

**Visibility \*** Public User Pages and Listings ▼

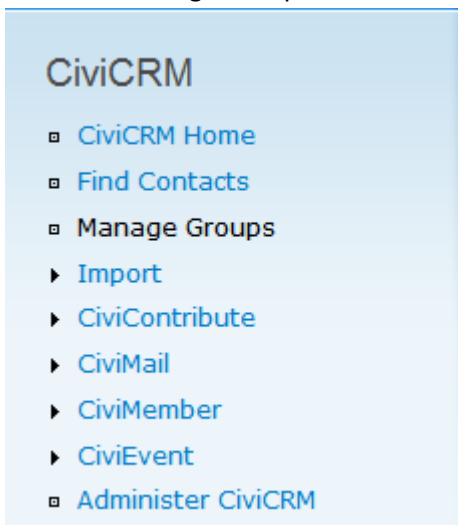
User and User Admin Only  
 Public User Pages  
 Public User Pages and Listings

Membership in this group is controlled by authorized CiviCRM users or themselves from this group via the Registration and Account Profile form User Pages'. If you also want to include group membership search and sharing in the Profile screens, select 'Public User Pages and Listings'.

6. Click ‘Continue’

### 3.2 Add member to application group or site team

1. Login
2. Click the ‘Manage Groups’ link on the left menu.



3. Scroll to the group that you wish to add the member to.
4. Click on the ‘Members’ link on that group’s row.

Group: Energy	User and User Admin Only	<a href="#">Members</a>   <a href="#">Settings</a>   <a href="#">Disable</a>   <a href="#">Delete</a>
Group: Microenterprise	User and User Admin Only	<a href="#">Members</a>   <a href="#">Settings</a>   <a href="#">Disable</a>   <a href="#">Delete</a>
Group: Mobility	User and User Admin Only	<a href="#">Members</a>   <a href="#">Settings</a>   <a href="#">Disable</a>   <a href="#">Delete</a>

5. Click the ‘Add Members to Group: *Group Name*’ link  
 » [Add Members to Group: Microenterprise](#)
6. Search for the member you want to add to the group using the search screen. (If you wish to populate your search with all members, simply do not enter any search criteria and click ‘Search’)

Find Contacts to Add to this Group

Find...  in  Tagged

Name

To search by first AND last name, enter 'lastname, firstname'. Example: 'Doe, Jane'. For partial name search, use '%partialname' ('%' equals 'begins with any combination of letters'). To search by email address, use [Advanced Search](#).

[» Advanced Search](#)

- Once the search results are displayed, check the boxes next to the names of the people you want to add to the group.

Found 27 contacts

☒ selected records only ☐ all 27 records

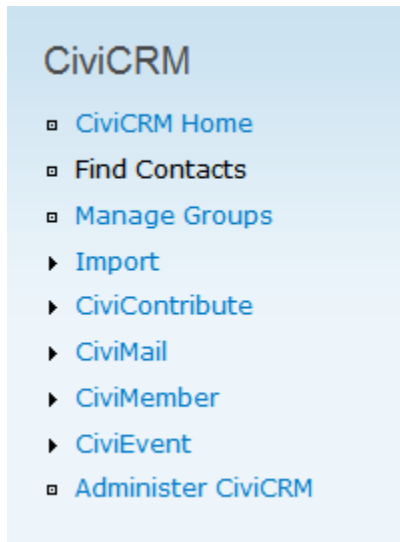
<input type="checkbox"/>	Name	Address	City	State	Postal	Country	Email	Phone	
<input checked="" type="checkbox"/>	Beiler, Anna								View   Edit
<input checked="" type="checkbox"/>	Bennett, Jay								View   Edit
<input type="checkbox"/>	Curd, Valerian								View   Edit
<input type="checkbox"/>	Derr, Andy								View   Edit
<input type="checkbox"/>	dv@gmail.com						dv@gmail.com		View   Edit
<input type="checkbox"/>	Earl, Brendan								View   Edit
<input type="checkbox"/>	Eastlake, Dean								View   Edit
<input checked="" type="checkbox"/>	Enders, David								View   Edit
<input type="checkbox"/>	Frank, Steve								View   Edit
<input type="checkbox"/>	Gabbadon, Craig								View   Edit
<input type="checkbox"/>	Geeslin, Daniel								View   Edit
<input checked="" type="checkbox"/>	Gilde, Philip								View   Edit
<input type="checkbox"/>	Heigel, Mom								View   Edit
<input type="checkbox"/>	Hostetter, David								View   Edit
<input type="checkbox"/>	Jones, Tim								View   Edit
<input checked="" type="checkbox"/>	Leid, Leon								View   Edit

- Click the 'Add Contacts to Group: Group Name' button.

- Confirm your addition on the next page.

### 3.3.1 CRUD member contact

- Login
- Click the 'Find Contacts' link on the left menu.

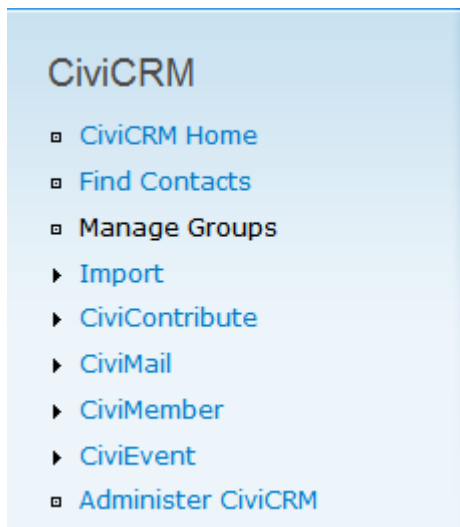


3. Search for the member you wish to edit.
4. Once you have found the member, click on their name.
5. You will be presented with the following screen where you can use the tabs to navigate through the different information stored for that member. Edit as needed.

 A screenshot of the CiviCRM contact profile for David Enders. The profile is displayed in a light blue header with the contact's name and a small icon. Below the header, there is a row of tabs: Summary, Contributions, Memberships, Events, Activities, Relationships, Groups, Notes, Tags, and Change Log. The 'Summary' tab is selected. Below the tabs, there is a section for 'Membership Information' with a sub-tab 'David Enders'. This section contains buttons for 'Edit', 'vCard', and 'Delete', along with a link to 'View Contact Dashboard'. Below this, there is a row of activity links: 'Send an Email', 'Schedule a Meeting', 'Schedule a Call', 'Log a Meeting', 'Log a Call', and 'Other Activities'. The main content area is divided into three sections: '(primary location)', 'Communications Preferences', and 'Demographics'. The 'Communications Preferences' section shows 'Privacy:' and 'Method: Mail Format Preference: Both'. The 'Demographics' section shows 'Gender:' and 'Date of Birth: October 24th, 1984'.

### 3.4 Edit details to an application group

1. Login
2. Click "Manage Groups" link on the left menu.



3. Go to the row containing the group you wish to edit and click the 'Settings' link.

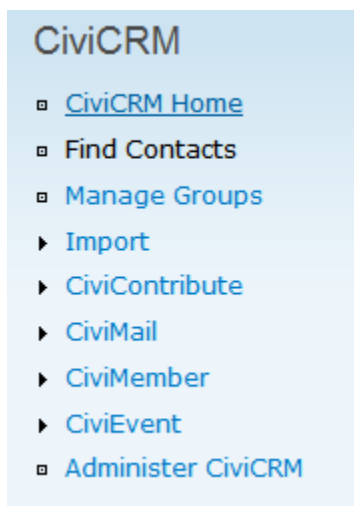
Group: Energy	User and User Admin Only	<a href="#">Members</a>   <a href="#">Settings</a>   <a href="#">Disable</a>   <a href="#">Delete</a>
Group: Microenterprise	User and User Admin Only	<a href="#">Members</a>   <a href="#">Settings</a>   <a href="#">Disable</a>   <a href="#">Delete</a>
Group: Mobility	User and User Admin Only	<a href="#">Members</a>   <a href="#">Settings</a>   <a href="#">Disable</a>   <a href="#">Delete</a>

4. Here you can edit the details of any group.

## 4. Reports

### 4.1 Print Partner list

1. Login
2. Click the 'Find Contacts' link on the left menu.



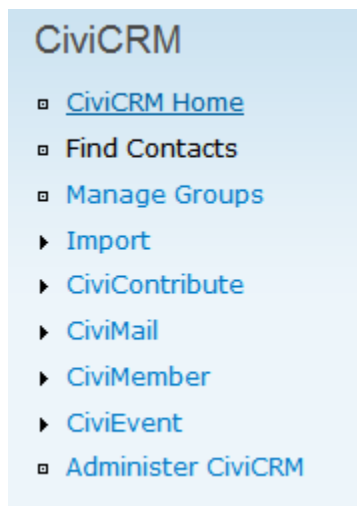
3. Search according to what you need. (Used the advances search feature for more detailed searches based on any information stored in the system.)

4. Once you have searched and found which records you need, select the check boxes next to the names you wish to print. (Or you can select the box in the blue bar directly above the names in order to check all the names found by the search.)
5. Once you have the appropriate names checked, click the print button.

6. On the next page, click the 'Print Contact List' button.

#### 4.2 Create report of new partners

1. Login
2. Click the 'Find Contacts' link on the left menu.



3. Click on the 'Advanced Search' option at the top.

4. Search according to what you need to find. In this case you will search by the 'Memberships' search information bar.

**» Memberships**

Membership Type(s)	Membership Status
<input type="checkbox"/> Collaboratory Member	<input type="checkbox"/> New
<input type="checkbox"/> Collaboratory Alum	<input type="checkbox"/> Current
<input type="checkbox"/> Prayer Partner	<input type="checkbox"/> Grace

Source

Start Date - From  -month-  -day-  -year-  To  -month-  -day-  -year-

Click to select date/time from calendar.  Click to select date/time from calendar.

End Date - From  -month-  -day-  -year-  To  -month-  -day-  -year-

Click to select date/time from calendar.  Click to select date/time from calendar.

- Once the search has populated you can either print the list using the steps outlined in “4.2 Create report of new partners” or you can export to Excel by clicking on the drop down box above the names.

**Found 1 contact**

**Membership Type = Collaboratory Member**

☐ select

☐ ☐

- more actions -
- Add Contacts to Household
- Add Contacts to Organization
- Add Contacts to a Group
- Batch Update via Profile
- Delete Contacts
- Export Contacts**
- Mailing Labels
- Map Contacts
- New Smart Group
- Record Activity for Contacts
- Remove Contacts from a Group
- Send Email to Contacts
- Tag Contacts (assign tags)
- Untag Contacts (remove tags)

#### 4.3 Member Information Report

- Login
- Follow the steps listed above in “4.2 Create Report of New Partners,” modifying the search functionality accordingly.

#### 4.4 Print linked Partner Information

- Login
- Follow the steps listed above in “4.2 Create Report of New Partners,” modifying the search functionality accordingly. This time you will also need to use the ‘Relationships’ search bar.

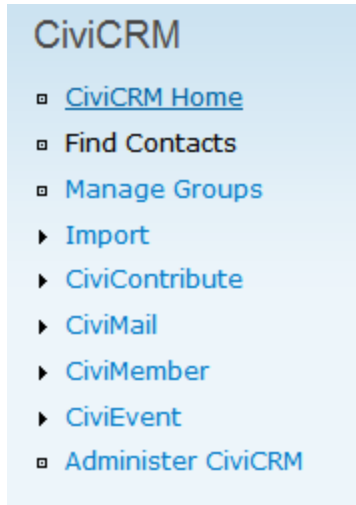
## 5. Member Management

### 5.1 Create a New Member

1. Login
2. To add a member follow the 5 step process outlined on the left sidebar.

### 5.2 Update or Delete a Member or Partner

1. Login
2. Click on the 'Find Contacts' on the left menu.



3. Search for the member you wish to delete or update.
4. Click the name of the person you wish to edit or delete.
5. Use the edit or delete buttons as necessary. You can also edit the data contained within the different tabs.



Jay Bennett

Recently Viewed: Jay Bennett David Enders robdwilk@gmail.com

Summary Contributions Memberships Events Activities Relationships Groups Notes Tags Change Log

Membership Information

Jay Bennett [Edit](#) [vCard](#) [Delete](#) » View Contact Dashboard

Send an Email Schedule a Meeting Schedule a Call Log a Meeting Log a Call Other Activities

(primary location)

Communications Preferences

**Privacy:** **Method:**  
**Mail Format Preference:** Both

Demographics

**Gender:** **Date of Birth:** November 16th, 1983

### 5.3 Add/remove a member to a site team

1. Login
2. Click the 'Find Contacts' link in the left menu.

CiviCRM

- ▣ [CiviCRM Home](#)
- ▣ [Find Contacts](#)
- ▣ [Manage Groups](#)
- [Import](#)
- [CiviContribute](#)
- [CiviMail](#)
- [CiviMember](#)
- [CiviEvent](#)
- ▣ [Administer CiviCRM](#)

3. Search for the member you wish to add to a site team or group.
4. Click that member's name.
5. Click the 'Groups' tag.

Summary Contributions Memberships Events Activities Relationships [Groups](#) Notes Tags Change Log

Membership Information

6. Use the dropdown menu to select which site team or group you would like to add the member to.

#### Current Groups

Group	Status	Date Added	
<b>Group: Energy</b>	Added (by Admin)	April 15th, 2007 7:21 PM	[ Remove ]

Add to a group \*

- select group -

Group: Transportation  
Group: Water Purification  
Prayer List: Site Team: Burkina Faso  
Prayer List: Site Team: Guatemala  
Prayer List: Site Team: Honduras  
Prayer List: Site Team: Kenya  
Prayer List: Site Team: Liberia  
Prayer List: Site Team: Malawi  
Prayer List: Site Team: Mali  
Prayer List: Site Team: Mozambique  
Prayer List: Site Team: Zambia  
Site Team: Burkina Faso  
Site Team: Guatemala  
Site Team: Honduras  
Site Team: Kenya  
**Site Team: Liberia**  
Site Team: Malawi  
Site Team: Mali  
Site Team: Mozambique  
Site Team: Zambia

Add

- Click the 'Add' button.

#### 5.4 Track member participation on site teams

- Login
- Perform a search for desired member/partner

### Contact Search

Search

[» Advanced Search](#)

- Select the individual with whom you wish to view site team participation.
- Click on the 'Groups' tab

Summary Contributions Memberships Events Activities Relationships **Groups** Notes

Tags Change Log Membership Information

#### Current Groups

Group	Status	Date Added	
<b>Group: Energy</b>	Added (by Admin)	April 15th, 2007 7:21 PM	[ Remove ]

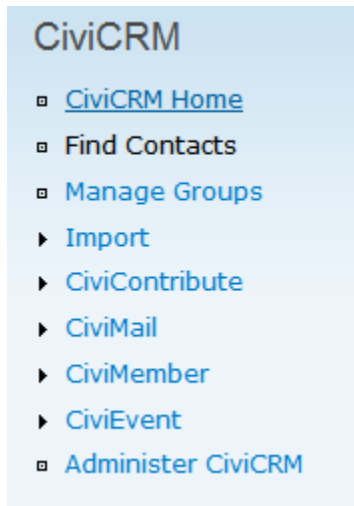
Add to a group \* - select group - Add

- Edit/view all of the groups or site teams that the individual is associated with.

#### 5.5 Search for a member

- Login

2. Click the 'Find contacts' link on the left menu.



3. At this point you can either do a blank search to populate a list of all contacts, do a simple search by name, or click on 'Advanced Search' and search on any information stored in the system.

A screenshot of the 'Find Contacts' page in CiviCRM. The page has a header 'Find Contacts' and a sub-header 'Recently Viewed' showing three contacts: Jay Bennett, David Enders, and robdwilk@gmail.com. Below this are three tabs: 'Find Contacts', 'Advanced Search' (highlighted with a red circle), and 'Search Builder'. A paragraph explains the search criteria form. Below this is a 'Search Criteria' form with three dropdown menus: 'Find...' (set to '- all contacts -'), 'in' (set to '- any group -'), and 'Tagged' (set to '- any tag -'). There is a text input field for 'Name'. Below the input field is a small text box with instructions: 'To search by first AND last name, enter 'lastname, firstname'. Example: 'Doe, Jane'. For partial name search, use '%partialname' ('%' equals 'begins with any combination of letters'). To search by email address, use Advanced Search.' To the right of the text box is a 'Search' button (highlighted with a red circle). At the bottom right of the form is a link '» Advanced Search' (highlighted with a red circle).

## 6. Website Integration

### 6.1 System Administrator, member, manager and team leader sign-in

1. Follow Login instructions.

## CiviContribute Instructions

CiviContribute “is an online fundraising and donor management component which enables you to track and manage contributions.”

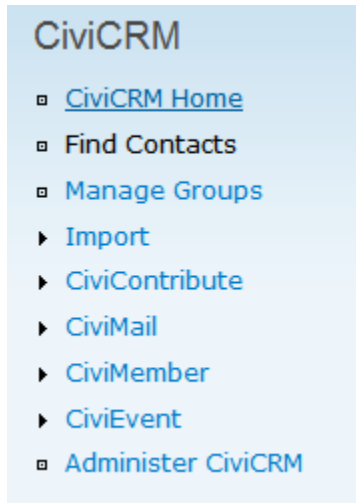
About CiviContribute - <http://civicrm.org/civicontribute>

CiviContribute Guide - <http://wiki.civicrm.org/confluence/display/CRM/CiviContribute+Guide>

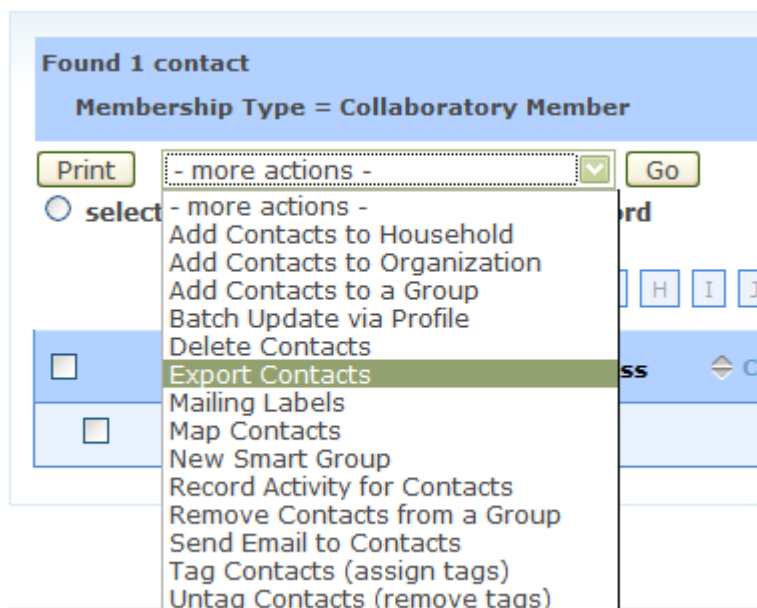
## 8. Newsletters/Communication

### 8.1 Export Contacts to Excel

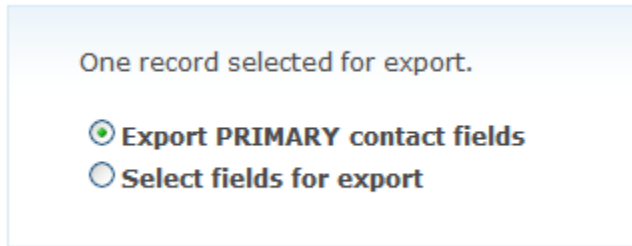
1. Login
2. Click the 'Find Contacts' link on the left menu.



3. Search for the contacts you need to find.
4. Check the box next to the names of the contacts you wish to export.
5. Select 'Export Contacts' from the dropdown menu.



6. Click 'Go'
7. You can choose to either the primary contact fields or you can choose to select your own contact fields to export.



One record selected for export.

☒ Export PRIMARY contact fields

☐ Select fields for export

8. Click the 'Continue' button and follow the instructions. If you export the primary fields, you will now be ready to export. If you want to choose the fields to export you will now do so.

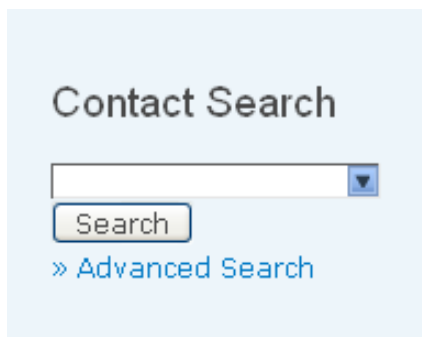
## 8.2 CRUD Prayer List Requests

1. \*See '1.1 Edit prayer list tags for a contact'


## 9. Money

### 9.1 View a financial gift from a partner/member

1. Login
2. Perform a search for desired member/partner



Contact Search



[» Advanced Search](#)

3. Select the individual who donated the gift
4. Click on the 'Contributions' tab
5. View the information associated with the individual's giving

Summary Contributions Memberships Events Activities Relationships Groups Notes

Tags Change Log Membership Information

Contributions received from robdwilk@gmail.com since inception. Click [New Contribution](#) to record a new offline contribution from this contact.

---

**Total Amount - \$ 1685.00   # Contributions - 14   Avg Amount - \$ 120.36**

---

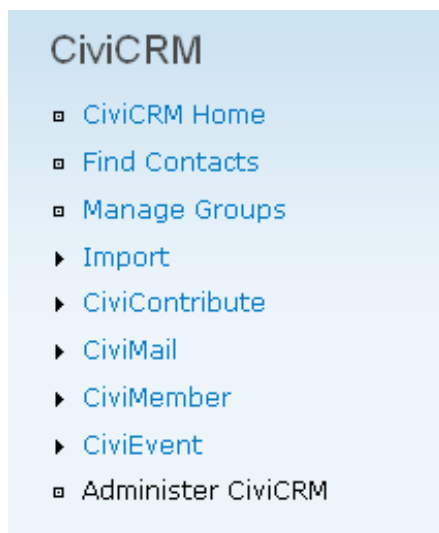
Amount	Type	Source	Received	Thank-you Sent	Status	Pre
\$ 0.00	Membership	Online Contribution: Subscribe to a Prayer List	May 7th, 2007		Completed	
\$ 6.00	Group: Education	Online Contribution: Donate to Group:	May 7th, 2007		Pending	

## 9.2 View a non-monetary gift from a partner/member

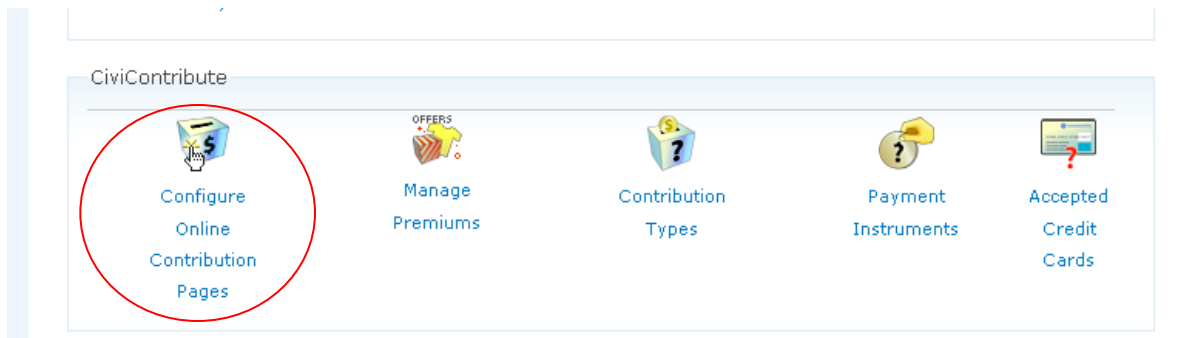
1. \*See '9.1 View a financial gift from a partner/member'

## 9.3 CRUD campaign

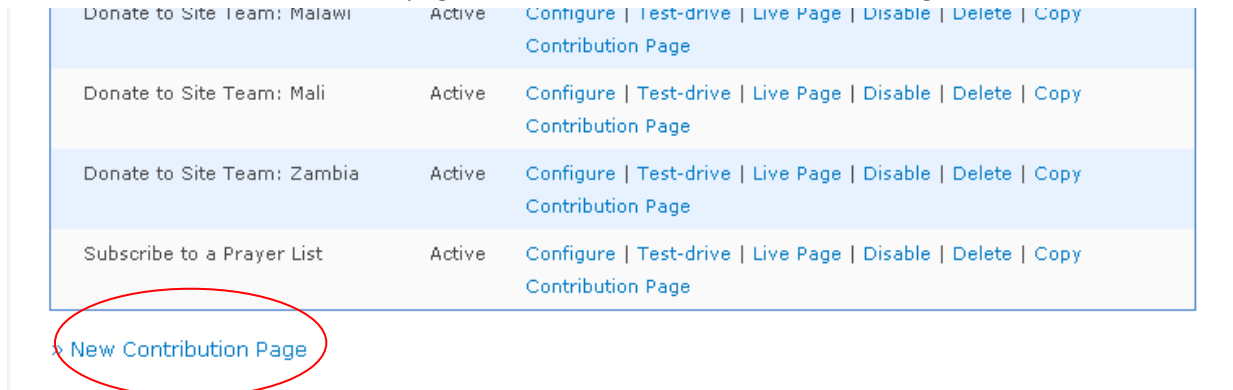
1. Login
2. Click on the 'Administer CiviCRM' link



3. Scroll to the bottom of the page to the 'CiviContribute' section
4. Click on the 'Configure Online Contribution Pages' link



5. Scroll to the bottom of the page and click on the 'New Contribution Page' link



6. In the first step for Contribution Type, select 'Campaign Contribution'

Title and Settings

**Title \***

This title will be displayed at the top of the page.

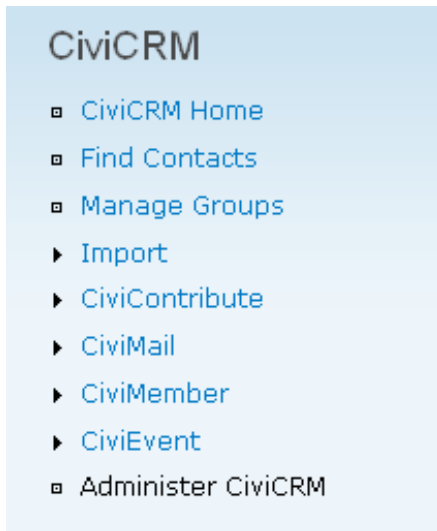
**Contribution Type** Campaign Contribution

Select the corresponding contribution type for contributions made using this page (e.g. donation, membership fee, etc.). You can add or modify available types using the

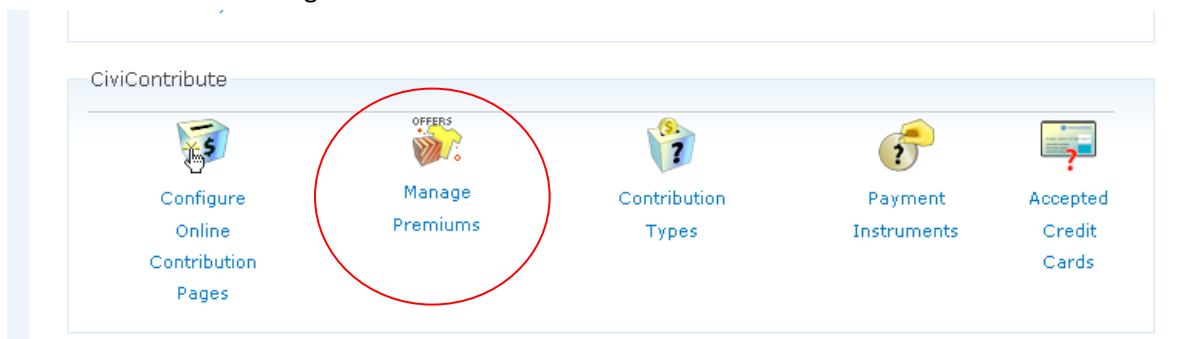
7. Follow the rest of the steps 1-5 to complete a campaign contribution page

#### 9.4 Give premiums

1. Save a photo of the premium to be offered in a easy-to-find folder on your C: drive
2. Login
3. Click on the 'Administer CiviCRM' link



4. Scroll to the bottom of the page to the 'CiviContribute' section
5. Click on the 'Manage Premiums' link



6. Click on the 'New Premium' link at the bottom of the page

pages. Then you can assign one or more premiums to a specific Contribution page from [Configure Online Contribution Pages](#) » [Configure](#) » [Premiums](#).

Name	SKU	Market Value	Min Contribution	Active?	
Coffee Mug		5.00	15.00	Yes	<a href="#">Edit</a>   <a href="#">Preview</a>   <a href="#">Disable</a>   <a href="#">Delete</a>

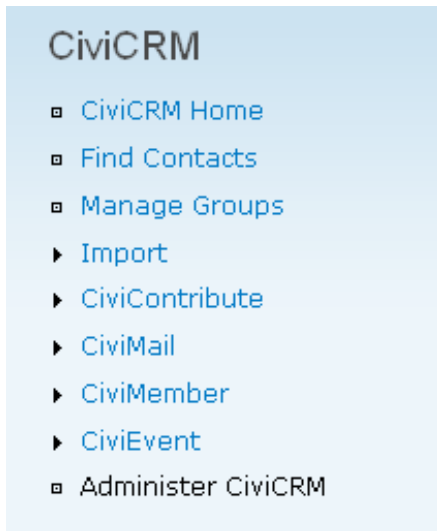
[» New Premium](#)

7. Input the information of the premium along with the saved photo from step 1
8. Premium may now be given to individuals who meet the criteria

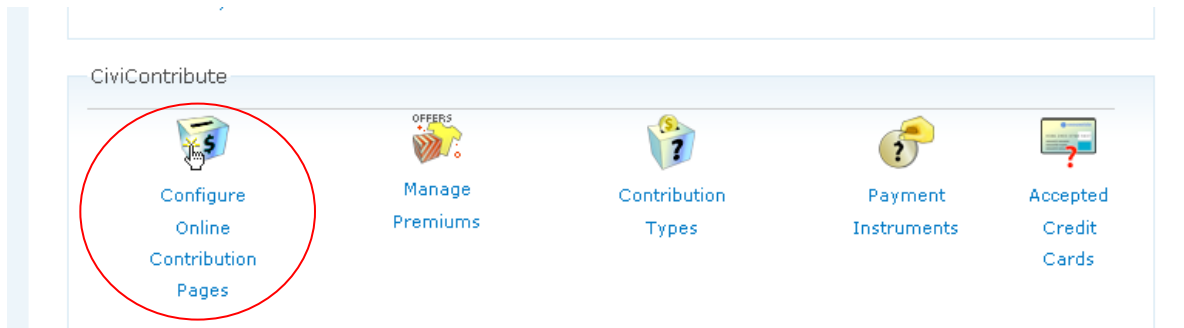
## 9.6 Create a pledge

1. Login
2. Click on the 'Administer CiviCRM' link

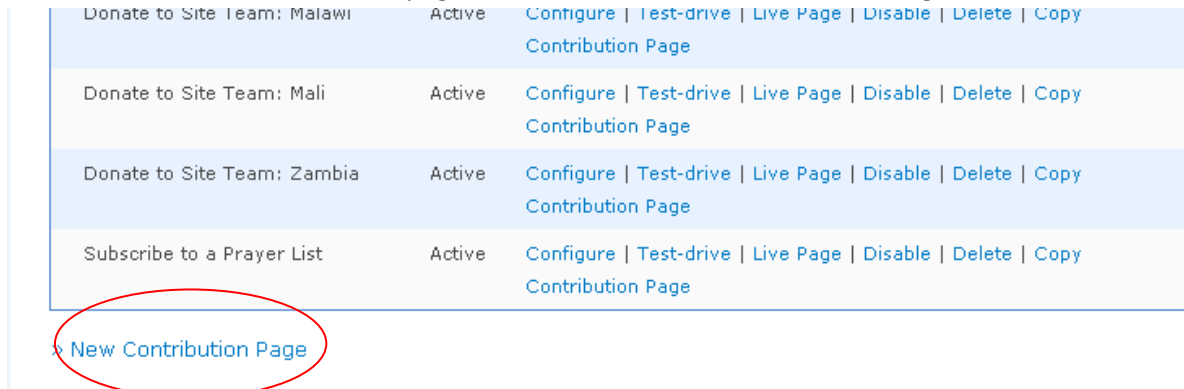




3. Scroll to the bottom of the page to the 'CiviContribute' section
4. Click on the 'Configure Online Contribution Pages' link



5. Scroll to the bottom of the page and click on the 'New Contribution Page' link



6. Follow the steps for a contribution page of your choice (i.e. select any 'Contribution type desired') and then click 'Continue'
7. In step 2 of the instructions select the 'Enable recurring payments' checkbox

Contribution Amounts

**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.

**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.

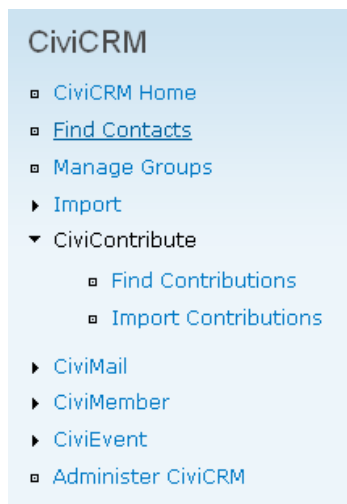
Use the table below to enter up to ten fixed contribution amounts. These will be presented as a list of radio button options. Both the label and dollar amount will be displayed.

**Enable recurring payments** ☒   
 Check this box if you want to give users the option to make recurring contributions. (This feature requires that you use "PayPal Website Standard" as your payment processor.)

8. Follow the rest of the steps to complete the contribution page.

## 9.7 Categorize income

1. Login
2. Click on the 'CiviContribute' link



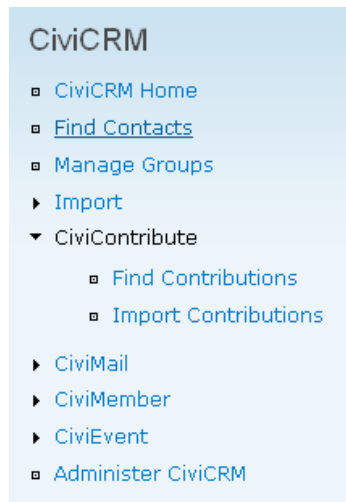
3. Click on the header of the column in order to sort that column

Name	Amount	Type	Source	Received	Thank-you Sent	Status	Premium
 <a href="#">robdwilk@gmail.com</a>	\$ 1500.00	Unfiled		May 3rd, 2007		Completed	<a href="#">View</a>   <a href="#">Edit</a>   <a href="#">C</a>
 <a href="#">robdwilk@gmail.com</a>	\$ 66.00	Site Team: Burkina Faso	Online Contribution: Donate to Site Team: Burkina Faso	May 4th, 2007		Pending	<a href="#">View</a>   <a href="#">Edit</a>   <a href="#">C</a>
 <a href="#">robdwilk@gmail.com</a>	\$ 59.00	Site Team: Burkina Faso	Online Contribution: Donate to Site Team: Burkina Faso	May 4th, 2007		Pending	<a href="#">View</a>   <a href="#">Edit</a>   <a href="#">C</a>
 <a href="#">robdwilk@gmail.com</a>	\$ 34.00	Site Team: Burkina Faso	Online Contribution: Donate to Site Team: Burkina Faso	May 4th, 2007		Pending	<a href="#">View</a>   <a href="#">Edit</a>   <a href="#">C</a>

4. Any column can be sorted ascending or descending

## 9.8 Print reports and/or tax receipts

1. Login
2. Click on the 'CiviContribute' link



3. Click on the desired name.

Name	Amount	Type	Source	Received	Thank-you Sent	Status	Premium
 robdwilk@gmail.com	\$ 1500.00	Unfiled		May 3rd, 2007		Completed	<a href="#">View</a>   <a href="#">Edit</a>   <a href="#">C</a>
 robdwilk@gmail.com	\$ 66.00	Site Team: Burkina Faso	Online Contribution: Donate to Site Team: Burkina Faso	May 4th, 2007		Pending	<a href="#">View</a>   <a href="#">Edit</a>   <a href="#">C</a>
 robdwilk@gmail.com	\$ 59.00	Site Team: Burkina Faso	Online Contribution: Donate to Site Team: Burkina Faso	May 4th, 2007		Pending	<a href="#">View</a>   <a href="#">Edit</a>   <a href="#">C</a>
 robdwilk@gmail.com	\$ 34.00	Site Team: Burkina Faso	Online Contribution: Donate to Site Team: Burkina Faso	May 4th, 2007		Pending	<a href="#">View</a>   <a href="#">Edit</a>   <a href="#">C</a>

4. Click on the contribution tab of the individuals name and print.

Summary
Contributions
Memberships
Events
Activities
Relationships
Groups

Notes
Tags
Change Log
Membership Information

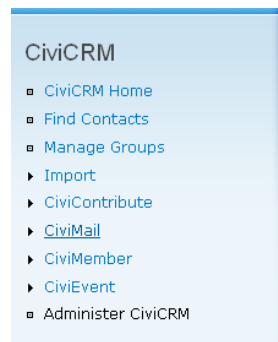
Contributions received from robdwilk@gmail.com since inception. Click [New Contribution](#) to record a new offline contribution from this contact.

**Total Amount - \$ 1685.00   # Contributions - 14   Avg Amount - \$ 120.36**

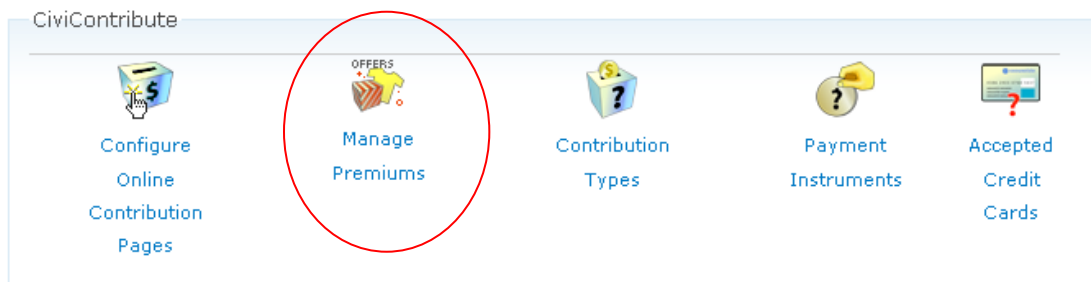
Amount	Type	Source	Received	Thank-you Sent	Status
\$ 0.00	Membership	Online Contribution: Subscribe to a Prayer List	May 7th, 2007		Completed
\$ 6.00	Group: Education	Online Contribution: Donate to Group: Education	May 7th, 2007		Pending
\$ 0.00	Membership	Online Contribution: Subscribe to	May 7th, 2007		Completed

## 9.9 Record gifts

1. Login
2. Click on Administer CiviCRM



3. Click on Manage Premiums in the CiviContribute section.



4. Follow the steps to create, edit, and delete gifts

**Manage Premiums**

**Recently Viewed:** robdwilk@gmail.com

CiviContribute allows you to configure any number of **Premiums** which can be offered to contributors as incentives / thank-you gifts. Premiums may be tangible items (i.e. a coffee mug or t-shirt), or they may be a membership or subscription with a pre-determined duration.

Use this section to enter and update all premiums that you want to offer on any of your Online Contribution pages. Then you can assign one or more premiums to a specific Contribution page from [Configure Online Contribution Pages](#) » **Configure** » **Premiums**.

Name	SKU	Market Value	Min Contribution	Active?	
Coffee Mug		5.00	15.00	Yes	<a href="#">Edit</a>   <a href="#">Preview</a>   <a href="#">Disable</a>   <a href="#">Delete</a>

[» New Premium](#)

## 9.10 Track Payments

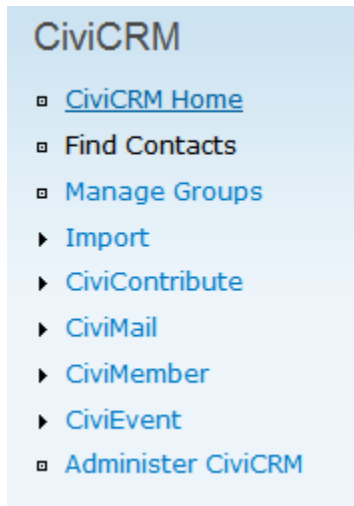
1. see 9.8

## 10. Reports

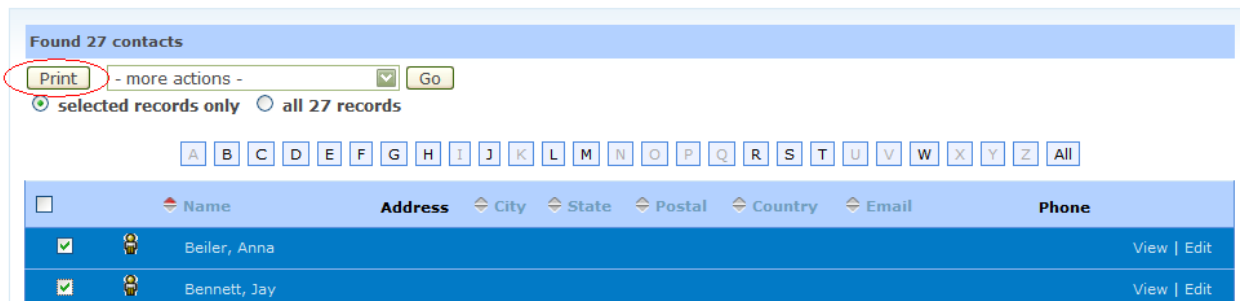
### 10.1 Print Partner list

1. Login

- Click the 'Find Contacts' link on the left menu.



- Search according to what you need. (Used the advances search feature for more detailed searches based on any information stored in the system.)
- Once you have searched and found which records you need, select the check boxes next to the names you wish to print. (Or you can select the box in the blue bar directly above the names in order to check all the names found by the search.)
- Once you have the appropriate names checked, click the print button.



- On the next page, click the 'Print Contact List' button.

## 10.2 Print Donation Total

- Login
- Click 'CiviContribute' link on left menu.

CiviCRM

- CiviCRM Home
- Find Contacts
- Manage Groups
- Import
- CiviContribute
  - Find Contributions
  - Import Contributions
- CiviMail
- CiviMember
- CiviEvent
- Administer CiviCRM

- In the 'Contributions Summary' area click on 'view details' to view the details you want to see.

### Contributions Summary

Period	Total Amount	#	
Current Month-To-Date	\$ 1500.00	2	<a href="#">view details...</a>
Current Year-To-Date	\$ 1500.00	2	<a href="#">view details...</a>
Cumulative (since inception)	\$ 1500.00	2	<a href="#">view details...</a>

- Use the check boxes to select which record you wish to print.

<input type="checkbox"/>	Name	Amount	Type	Source	Received	Thank-you Sent	Status	Premium	
<input checked="" type="checkbox"/>	 robdwilk@gmail.com	\$ 0.00	Membership	Online	May 4th, 2007		Completed		<a href="#">View</a>   <a href="#">Edit</a>   <a href="#">Delete</a>
<input type="checkbox"/>	 robdwilk@gmail.com	\$ 1500.00	Unfiled		May 3rd, 2007		Completed		<a href="#">View</a>   <a href="#">Edit</a>   <a href="#">Delete</a>

- Click the 'Print' button.

Found 2 contributions.

Contribution Status - "Completed" ... AND ...

Contribution Date - greater than or equal to "May 1st, 2007" ... AND ...

Contribution Date - less than or equal to "May 4th, 2007 12:00 AM"

Total Amount - \$ 1500.00 # Contributions - 2 Avg Amount - \$ 750.00

**Print** - more actions -

☒ selected records only ☐ all 2 records

<input type="checkbox"/>	Name	Amount	Type	Source	Received	Thank-you Sent	Status	Premium
<input checked="" type="checkbox"/>	robdwilk@gmail.com	\$ 0.00	Membership	Online Contribution: Subscribe to a Prayer List	May 4th, 2007		Completed	<a href="#">View</a>   <a href="#">Edit</a>   <a href="#">Delete</a>
<input type="checkbox"/>	robdwilk@gmail.com	\$ 1500.00	Unfiled		May 3rd, 2007		Completed	<a href="#">View</a>   <a href="#">Edit</a>   <a href="#">Delete</a>

6. On the next page click the 'Print Contributions' button.

## 11. Member Management

### 11.1 Track member fundraising

1. Login
2. Use the advanced search feature to search for a member name as well as a contribution in the 'Contributions' search bar.

### 11.2 Track site team fundraising

1. Login
2. Click 'Advanced Search' on the left menu.

**Contact Search**

[» Advanced Search](#)

3. Use the 'Contributions' search bar to perform your search.



**» Contributions**

Contribution Dates - From     To

Minimum Amount

Contribution Type

Contribution Page

Status ☐ Completed ☐ Pending ☐ Cancelled ☐ All

In Honor Of

Contribution Source

Transaction ID

Maximum Amount

Paid By

☐ Receipt not set?

☐ Thank-you date not set?

☐ Find Test Contributions Only?

☐ Recurring Contributions Only

- Select the appropriate site team or group that you wish to view contributions for in the 'Contribution Type' dropdown.

Contribution Dates - From

Minimum Amount

Contribution Type

Contribution Page

Status ☐ Cancelled ☐ All

In Honor Of

Contribution Source

Transaction ID

Campaign Contribution  
 Collaboratory: General  
 Group: Communications  
 Group: Education  
 Group: Energy  
 Group: Microenterprise  
 Group: Mobility  
 Group: Transportation  
 Group: Water Purification  
 Membership  
 Prayer  
 Site Team: Burkina Faso  
 Site Team: Guatemala  
 Site Team: Honduras  
 Site Team: Kenya  
 Site Team: Liberia  
 Site Team: Malawi  
 Site Team: Mali  
 Site Team: Zambia

- Click the 'Search' button.

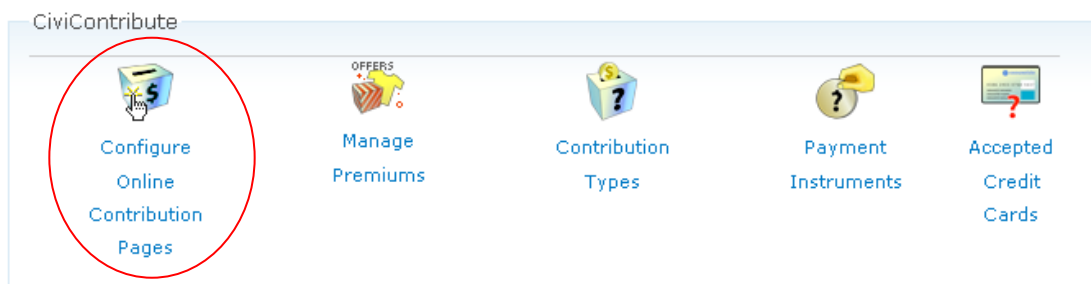
## 12. Partners

### 12.1 Send a receipt to a partner

- Login
- Click on Administer CiviCRM



3. Click on Configure Online Contribution Pages in the CiviContribute section.



4. Select “Configure” for the appropriate page.

**Configure Online Contribution Pages**

Recently Viewed: robdwilk@gmail.com

CiviContribute allows you to create and maintain any number of Online Contribution Pages. You can create different pages for different programs or campaigns - and customize text, amounts, types of information collected from contributors, etc. ([read more...](#))

For existing pages:

- Click **Configure** to view and modify settings, amounts, and text for existing pages.
- Click **Test-drive** to try out the page in **test mode**. This allows you to go through the full contribution process using a dummy credit card on a test server.
- If your page is enabled, click **Live Page** to view to the page in **live mode**.

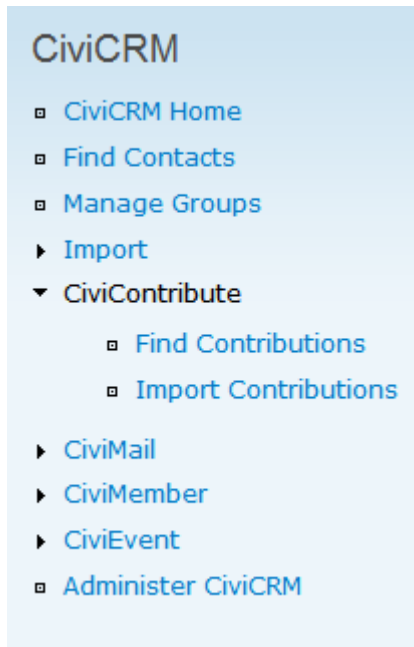
Click [New Contribution Page](#) to create and configure a new online contribution page using the step-by-step wizard.

Title	Status?	
Donate to Full Collaboratory	Active	<a href="#">Configure</a>   <a href="#">Test-drive</a>   <a href="#">Live Page</a>   <a href="#">Disable</a>   <a href="#">Delete</a>   <a href="#">Copy</a>
Donate to Group: Communications	Active	<a href="#">Configure</a>   <a href="#">Test-drive</a>   <a href="#">Live Page</a>   <a href="#">Disable</a>   <a href="#">Delete</a>   <a href="#">Copy</a>
Donate to Group: Education	Active	<a href="#">Configure</a>   <a href="#">Test-drive</a>   <a href="#">Live Page</a>   <a href="#">Disable</a>   <a href="#">Delete</a>   <a href="#">Copy</a>

5. Click on the thank-you and receipting link, and ensure that the email receipt to contributor option is checked.

## 12.2 Track donation information

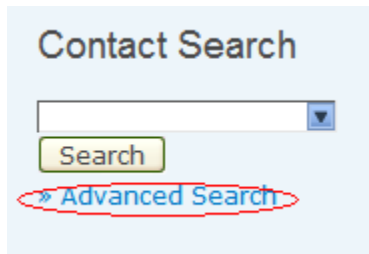
1. Login
2. Click the ‘CiviContribute’ link on the left menu.



3. Use CiviContribute as appropriate.

### 12.3 Track donation method

1. Login
2. Click 'Advanced Search' on the left menu.



3. Use the 'Contributions' search bar to perform your search.
4. Use the 'Paid By' dropdown to search by donation method.

The image shows the 'Contributions' search form. The form includes fields for Contribution Dates (From and To), Minimum Amount, Maximum Amount, Contribution Type, Contribution Page, Status (Completed, Pending, Cancelled, All), In Honor Of, Contribution Source, and Transaction ID. The 'Paid By' dropdown menu is open, showing options: - select -, Credit Card, Debit Card, Cash, Check, EFT, To: Water Group, and Recurring Contributions Only. The 'Paid By' dropdown is circled in red.

#### 12.4 Process returned DE cards

1. Login
2. Search for a member or partner as described in “5.5 Search for a member”

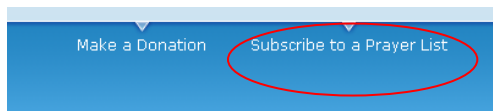
#### 12.5 Search for a partner

1. Login
2. Follow the same method for searching as described in “5.5 Search for a member”

### 13. Current Website Integration

#### 13.1 Subscribe to prayer team via website

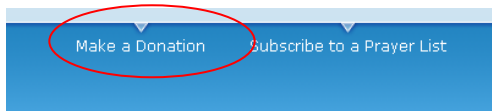
1. Login
2. Click on the “Subscribe to a Prayer List” link on the top right corner of the screen.



3. Follow the onscreen instructions to subscribe to the desired prayer lists.

#### 13.2 Contribute to a site team or the entire Collaboratory via website

1. Login
2. Click on the “Make a Donation” link on the top right corner of the screen.



3. Follow the onscreen instructions to make a donation to the desired group or team.

### CiviMail Instructions

CiviMail “is a robust mass-mailing component which allows you to engage your constituents with personalized email blasts and newsletters.”

About CiviMail - <http://civicrm.org/civimail>

CiviMail Guide - <http://wiki.civicrm.org/confluence/display/CRM/CiviMail+Guide>

### 14. Newsletters/Communication

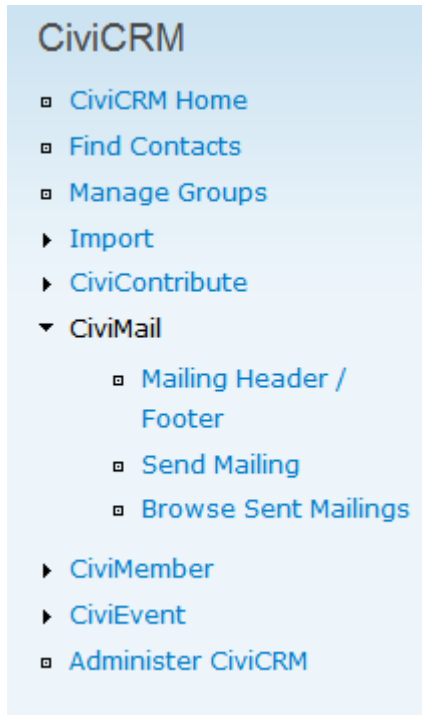
#### 14.1 CRUD Mailing Groups

1. Login
2. Click the “Manage Groups’ link on the left menu.

3. Create a new prayer newsletter group by using the same method as described in “3.1 Create/delete application group or site team.”

## 14.2 Send Email

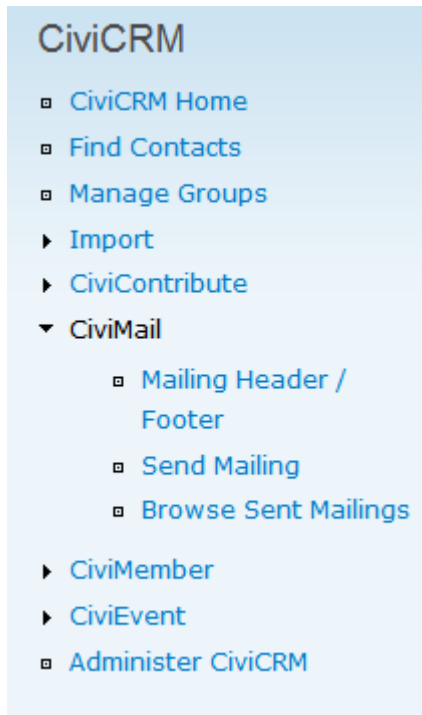
1. Login
2. Click ‘CiviMail’ link on the left menu.



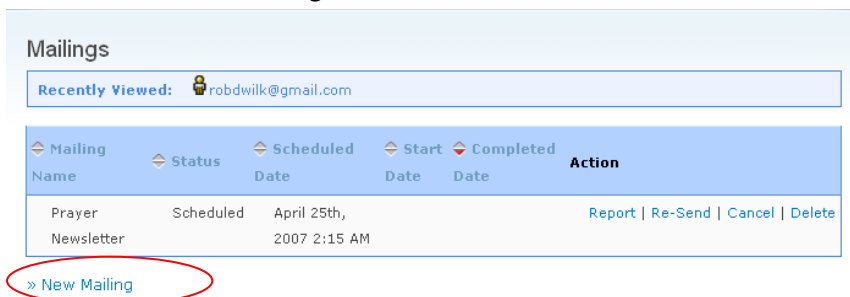
3. Click on the ‘Send Mailing’ link on the left submenu under ‘CiviMail’
4. Follow the onscreen instructions to send a mailing.

### 14.2.1 Mass Email

1. Login
2. Click ‘CiviMail’ link on the left menu.



3. Click on the “New Mailing” link.



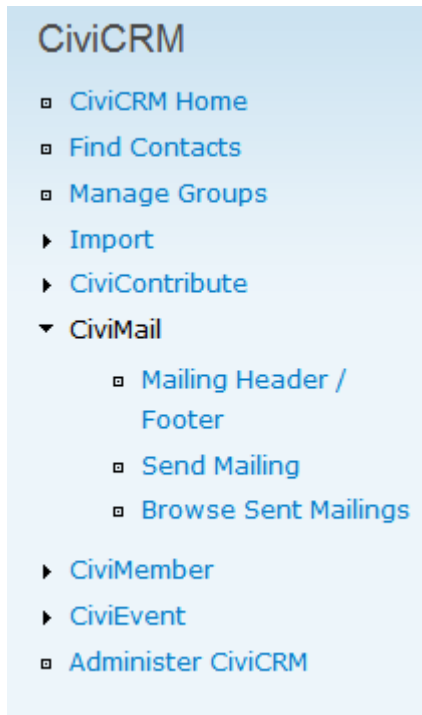
4. Follow onscreen instructions to send mailing to multiple groups.

#### 14.2.2 Prayer letter to partners

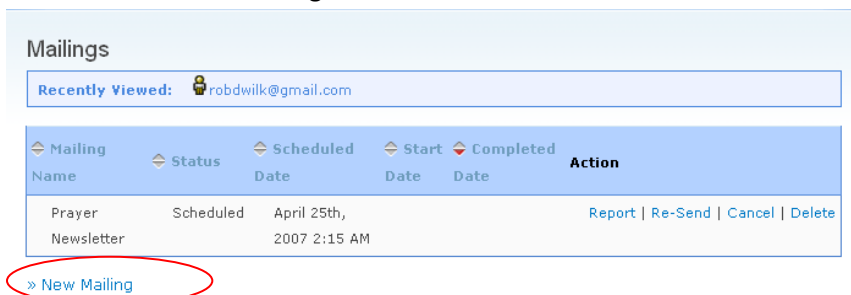
1. Login
2. Follow instructions outlined in “14.2 Send Email,” making sure to specify that the mailing will be going to the prayer list group you want it to.

#### 14.2.3 Pledge-reminder

1. Login
4. Click ‘CiviMail’ link on the left menu.



5. Click on the “New Mailing” link.



6. Follow onscreen instructions to send mailing to the group you are reminding about the pledge..

#### 14.2.4 Thank-you

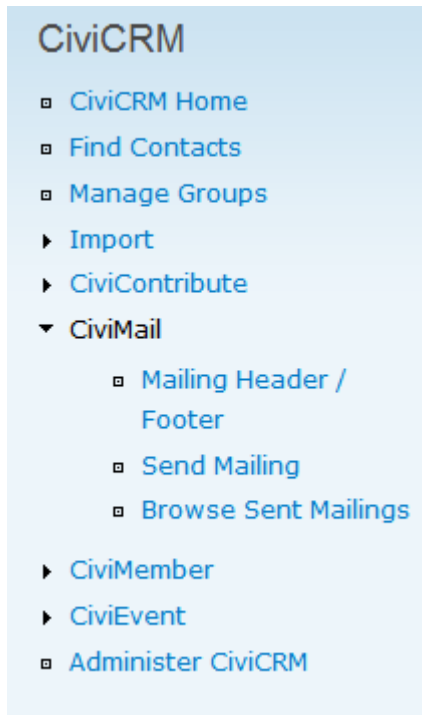
1. Login
2. Follow instructions outlined in “14.2 Send Email,” making sure to specify that the mailing will be going to the group or contact you want it to.

#### 14.2.5 Send email/newsletter to partner/member

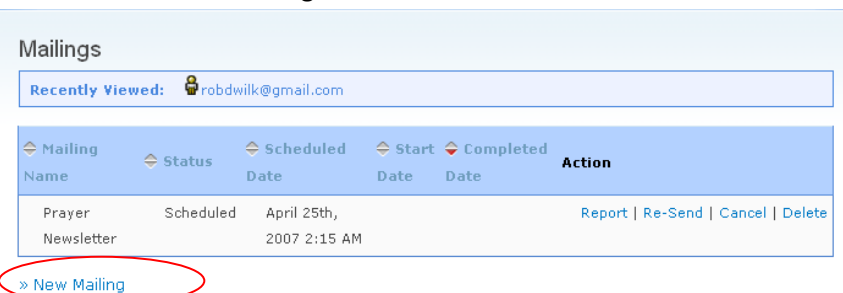
1. Login
2. Follow instructions outlined in “14.2 Send Email,” making sure to specify that the mailing will be going to the group or contact you want it to.

#### 14.3 Unsubscribe contact

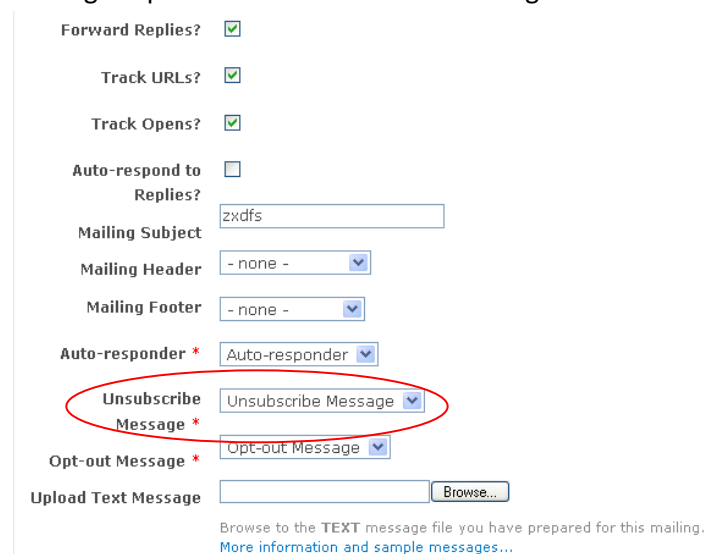
1. Login
2. Click ‘CiviMail’ link on the left menu.



3. Click on the “New Mailing” link.



4. Follow onscreen instructions to send mailing. On step 3, ensure that the “Unsubscribe Message” option has an unsubscribe message selected.

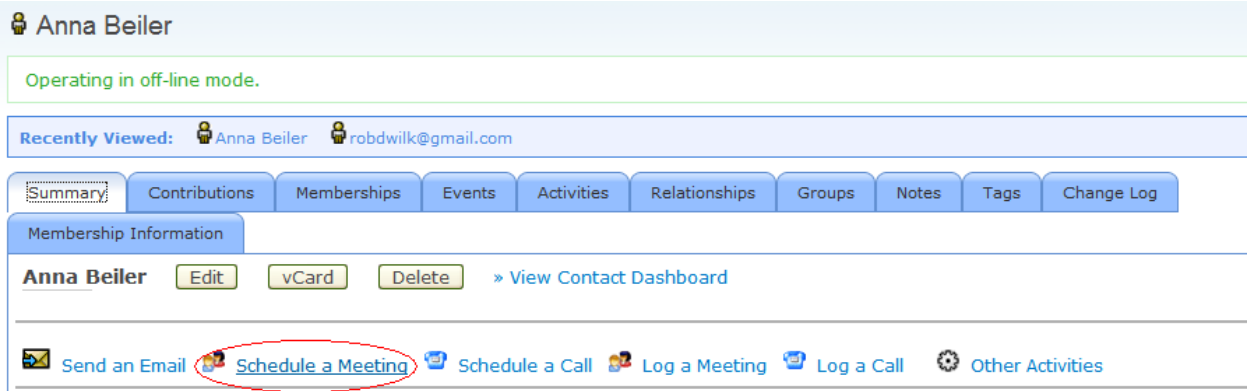




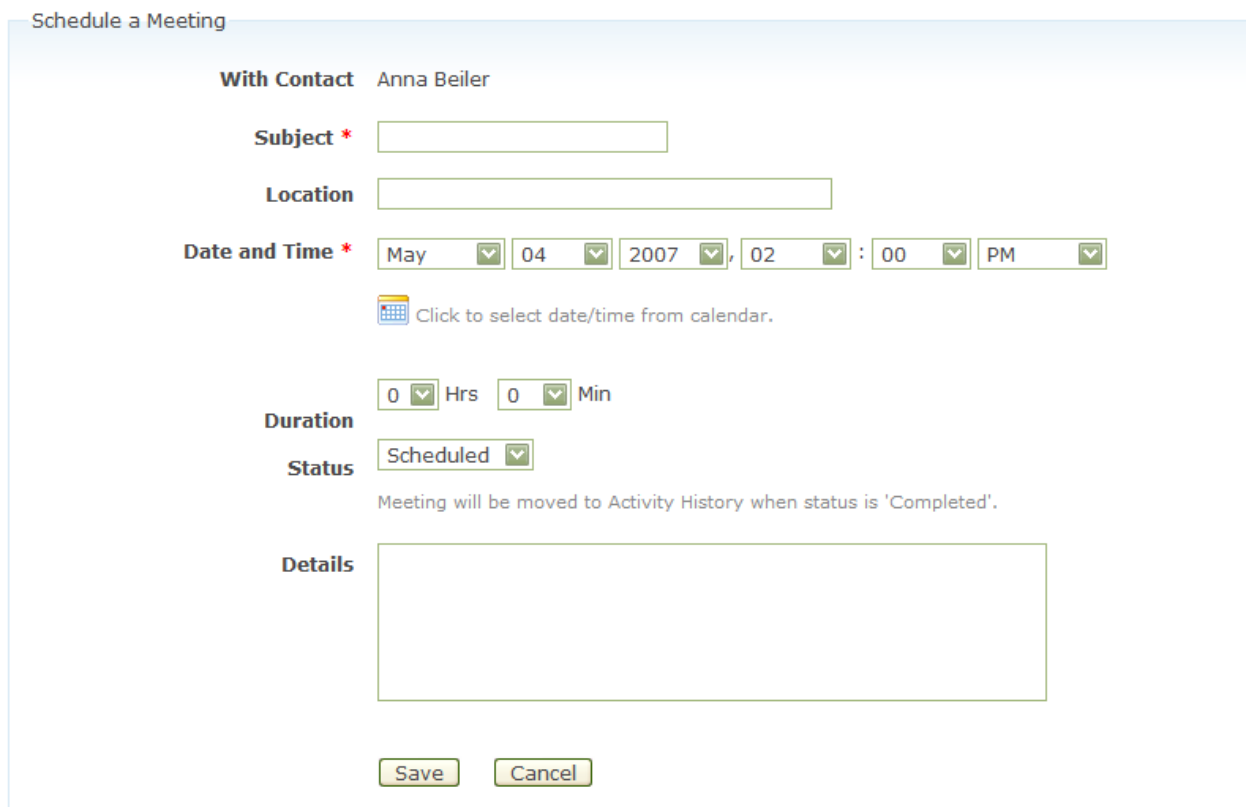
## 15. Member Management

### 15.1 Schedule a meeting

1. Login
2. Search for contacts you want to meet with as described in “5.5 Search for a member.”
3. Click on the name of the contact you wish to set up a meeting with.
4. Click the ‘Schedule a Meeting’ link in their profile summary.



5. Fill in the appropriate information in the following screen:



6. Click the ‘Save’ button.