CiviCRM: Content Maintenance & Event Management

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Chapter 1. Introduction

CiviCRM is the constituent relationship management software used by the Rabbinical Assembly's website.

*This guide will focus on two CiviCRM features that are most relevant to your work as an Administrative Assistant: **contact maintenance** and **event management**.*

If you have any questions that aren't covered here, please feel free to reach out to Christine Aucoin.

> **Important:**
> On the RA homepage, click on **CiviCRM** from the black bar at the top of the screen. That'll get you to the CiviCRM menu – your first steps for ALL of the tasks in this guide!

Chapter 2. Contact Maintenance

To keep our work accurate, the Rabbinical Assembly tracks and updates a lot of information about our 1,600-person membership. Here's how!

How To Edit A Contact

1. Navigate to the search bar at the top left of the CiviCRM menu.
2. Search for your contact in the format **Last Name, First Name.**
3. Click on your contact's name. This will bring you to the contact's **summary page.**
4. On the contact's **summary page**, click on the field that you want to change and enter the updated information.
5. Click **Save.**

Understanding The Contact Summary Page

In the main body of the summary page, you'll most often be updating the following fields:

- Employer Information
- Home & Work Email
- Home & Work Phone
- Home & Work Address

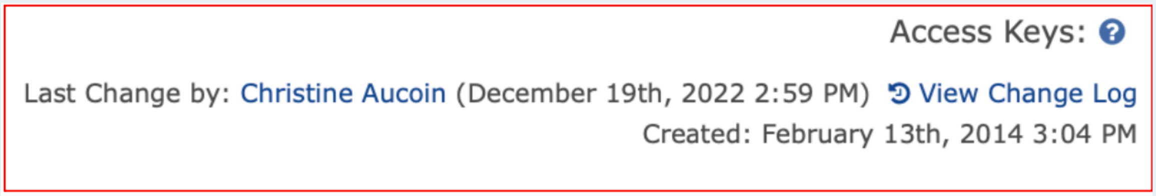
> **Important:**
> when you're updating someone's address, make sure to also update the **Regional Cluster** field. If one field is changing, so is the other one!

At the bottom right of the summary page's main body, you'll see a dropdown menu labeled "Constituent Information." Under that menu, you'll most often be updating the following fields:

- RA Membership Status
- Marital Status
    - **Subfield:** Name of Spouse/Partner
- Area of Work
    - **Subfields:** Pulpit, Chaplain, or Organization Type
- Place/Date of Ordination
- Regional Cluster

Tip:

If you're confused about a contact's information, check the bottom right of that contact's summary page. You can see the last person who made an update.



How to Update A Contact's Membership Status

A member's status might change if they fall behind on their dues, become suspended, or leave the RA. Changing their status temporarily restricts their access to the RA website.

1. Navigate to the **Constituent Information** dropdown menu of the contact's summary page.
2. Click on the **RA Membership Status** field.
3. Change the contact's status to one of the following options:
    a. **Member**: A member that is fully paid on their dues.
    b. **Not In Good Standing:** A member who is behind on their dues.
    c. **Suspended:** A member who has been suspended by our Ethics Committee.
    d. **Former Member:** Someone who has left the RA.
4. Click **Edit.**
5. Change the contact's status from **Active** to **Blocked**.

Important:

In this step, you move from CiviCRM to Drupal, the RA's content management system. Changing the contact's status in Drupal is what actually blocks their RA website access.

6. Click **Save**.

How To Merge Duplicate Files

Sometimes, when members sign up for events or purchase books with an email other than the one in our system, they accidentally create a duplicate profile.

1. Navigate to the search bar at the top left of the CiviCRM menu.
2. Search for your contact in the format **Last Name, First Name**. If there are duplicate profiles, multiple copies of the same name will populate.
3. Click **Enter**.
4. Select the profiles that you want to merge.

☑		Goldstein, Alan	1 trinity court	Rancho mirage	CA	92270	United States
☑		Goldstein, Alan	4986 Sentinel Drive	Bethesda	MD	20816	United States

5. From the **Actions** dropdown menu, select **Merge Contacts**.
6. Select which pieces of information you want to migrate from the duplicate profile.
7. Click **Merge**.

> **Important:**
>
> Always make sure that the Drupal account attached to the profile you're keeping is the one you want - **the Drupal account attached to the duplicate profile will be deleted!** The correct Drupal account should have the "RA Member" permission checked off under **Roles**. Duplicate profiles will not have **any** roles assigned to them.

Troubleshooting Website Access

If a contact is having trouble accessing the RA website, ask yourself:

- Are they listed as being a **Member in Good Standing** in CiviCRM?
- Is their status listed as **Active** in Drupal?
- When you search for their name, do duplicate profiles populate?

How To Run An Advanced Search

Our office runs advanced searches to pull lists of members organized by relevant data.

1. Navigate to the **Search** dropdown menu at the top left of the CiviCRM menu.
2. Click **Advanced Search**.
3. Under the **Custom Fields** dropdown menu, set **RA Membership Status** to **Member**.
4. Under the **Demographics** dropdown menu, set **Is Deceased** to **No**.

> **Important:**
> Always follow Steps 3 and 4 before continuing with **any** kind of member-specific advanced search!

5. Define your search by whatever information you are looking to pull.
6. Click **Search**.
7. Select **All Records**.
8. Under the **Actions** dropdown menu, select **Export Contacts**.
9. Click **Select Fields for Export**.
10. Add the fields that you would like to export. Common fields include:
    a. First Name
    b. Last Name
    c. RA Membership Status
    d. Email Address
    e. Place/Date of Ordination
11. Click **Download File**. This will download your information as a CSV file.

If I want to pull an advanced search of...	Then I'll set my search fields to...
Members in the United States working in the pulpit	• Constituent Information → RA Membership Status → Member • Demographics → Is Deceased → No • Address Fields → Country → United States • Custom Fields → Area of Work → Pulpit
Female members over 50	• Constituent Information → RA Membership Status → Member • Demographics → Is Deceased → No • Demographics → Gender → Female • Demographics → Min Age → 50
Members ordained by the Jewish Theological Seminary from 2017-2020	• Constituent Information → RA Membership Status → Member • Demographics → Is Deceased → No • Constituent Information → Place of Ordination → Jewish Theological Seminary • Constituent Information → Ordination Year → 2017, 2018, 2019, 2020

Chapter 3. Event Management

The Rabbinical Assembly runs dozens of virtual programs a month, including professional development webinars, public-facing lecture series, and ongoing members-only conversations about Jewish law and standards. We use CiviCRM to create and manage event registrations and participant lists.

How To Create A Registration Page

1. Navigate to the **Events** dropdown menu at the top center of the CiviCRM menu.
2. Click **New Event**.
3. Set **Event Type** to **Meeting**.
4. Set **Default Role** to **Attendee**.
5. Fill in the **Event Title**.
6. In the **Complete Description** field, fill in the following information:
    a. Weekday, date, and time of the event (**INCLUDING**: EST, PST, and Israel Time).
    b. Event description.
7. In the **Start** field, enter the date and time of the event.
8. Click **Continue**.
9. Navigate to the **Online Registration** tab and click **Allow Online Registration**.
10. Populate the **Registration Start Date** and **Registration End Date** fields.
11. Populate the **Introductory Text** field with the same information that you used in Step 6.
12. Under **Include Profile**, select which questions you want participants to answer when registering (see here for a more in-depth explanation *(on page 10)*).
13. Under **Confirmation Screen**, select **Yes**.
14. Under **Confirmation Email**, select **Yes** and fill in whatever information you want participants to receive in a confirmation email.

    > **Important:**
    > Ask the lead professional for your event whether they would like to be BCC'd on confirmation emails.

15. Click **Save**.

How To Customize The Questions On Your Registration Form

The default registration profile, "Basic Contact Info," will ask participants for their name and email. But what if you need more info than that? Never fear!

1. Navigate to the **Online Registration** tab of your event.
2. Under **Include Profile**, click **Create**. This will let you create a new registration profile specific to your event.
3. Set a name for your profile. Usually, this will be the name of your event.
4. Add the questions that you want participants to answer when they register. Your options are to:
    a. Add existing questions by dragging them from the right-hand menu into your new profile.
    b. Create a new question by scrolling all the way to the bottom of the right-hand menu and clicking **Add New Field**.
5. Click **Save**.

> **Tip:**
> CiviEvent gives you a few options while creating registration questions. You could include a question with any of the following formats:
>
> - Single-line input field
> - Drop-down menu
> - Radio buttons
> - Checkboxes

How To Add Event Fees

1. *The Rabbinical Assembly hosts both free and paid events.*

1. Navigate to the **Fees** tab of your event.
2. Under **Paid Event**, click **Yes**.
3. Under **Currency**, click **USD**.
4. If you are allowing participants to pay by check, select **Enable Pay Later Option**.
    a. Under **Pay Later Instructions**, unless you are told otherwise, enter this information:
        i. Please send payment to: The Rabbinical Assembly, 3080 Broadway, Broadway, New York, NY 10027.
5. Under **Financial Type**, select **Event Fee**.
6. There are two options to create your fee levels:

   a. Use the **Regular Fees**field to enter up to ten **Fee Labels**and **Amounts**.
   b. For more complicated events, create a **Price Set** by clicking on the **Contributions**dropdown menu and selecting **New Price Set**.
7. Click **Save**.

How To Create A Discount Code

1. Navigate to the **Contributions** dropdown menu at the top center of the CiviCRM menu.
2. Select **CiviDiscount**.
3. Scroll all the way down to the bottom of the page and click **New Discount Code**.
4. Under **Discount Code**, create a name for your code. If the code you choose is already in the system, you will receive an error message asking you to type in another code.
5. Under **Discount Amount**, select whether you want your discount to be quantified by **Percent** or **Fixed Amount** then enter the amount.
6. Select the **Discount for Events** dropdown menu and select which event this code will be active for.
7. Under **Price Field Options**, select which price fields this discount will apply to.
8. Click **Save**.

How To Manage Existing Events

1. Navigate to the **Events** dropdown menu at the top center of the CiviCRM menu.
2. Click **Manage Events**.
3. Either scroll down to find the event you're looking for, or use the **Event Name** search bar.

> **Tip:**
> You can toggle the **Event Name** search bar between two options: **Show Current and Upcoming Events**, or **Search All or By Date Range**.

4. Select between one of the dropdown menu options on the far right side of the event.
   a. To edit an event, click **Configure** and then **Online Registration**.
   b. To view the list of people who have registered for the event, click **Participants**, then **Registered, Attended, Awaiting Approval**.

How To Export An Event's Participant List

1. Navigate to the **Events** dropdown menu at the top center of the CiviCRM menu.
2. Click **Manage Events**.
3. On the far right side of the event, click **Participants**, then **Registered, Attended, Awaiting Approval**.

4. Select **All [Number] Records**.
5. From the **Actions** dropdown menu, select **Export Participants**.
6. Click **Select Fields for Export** and select the information that you want to pull.
7. Click **Download File**.