RKS CRM System

A basic introduction on how to use the CRM system.

Write notes here

Basics:

Backend URL: https://crmv1.rochesterkinksociety.com

Frontend URL: https://crmv1.rochesterkinksociety.com/Doorsheet

Please make sure you are connecting to the HTTPS site. This assures full encryption of all the data being sent back and forth.

If you connect to the non-encrypted site for the front-end, the system simply won't work (this is a security feature in your browser). In the back-end you will need to re-login.

The Doorsheet

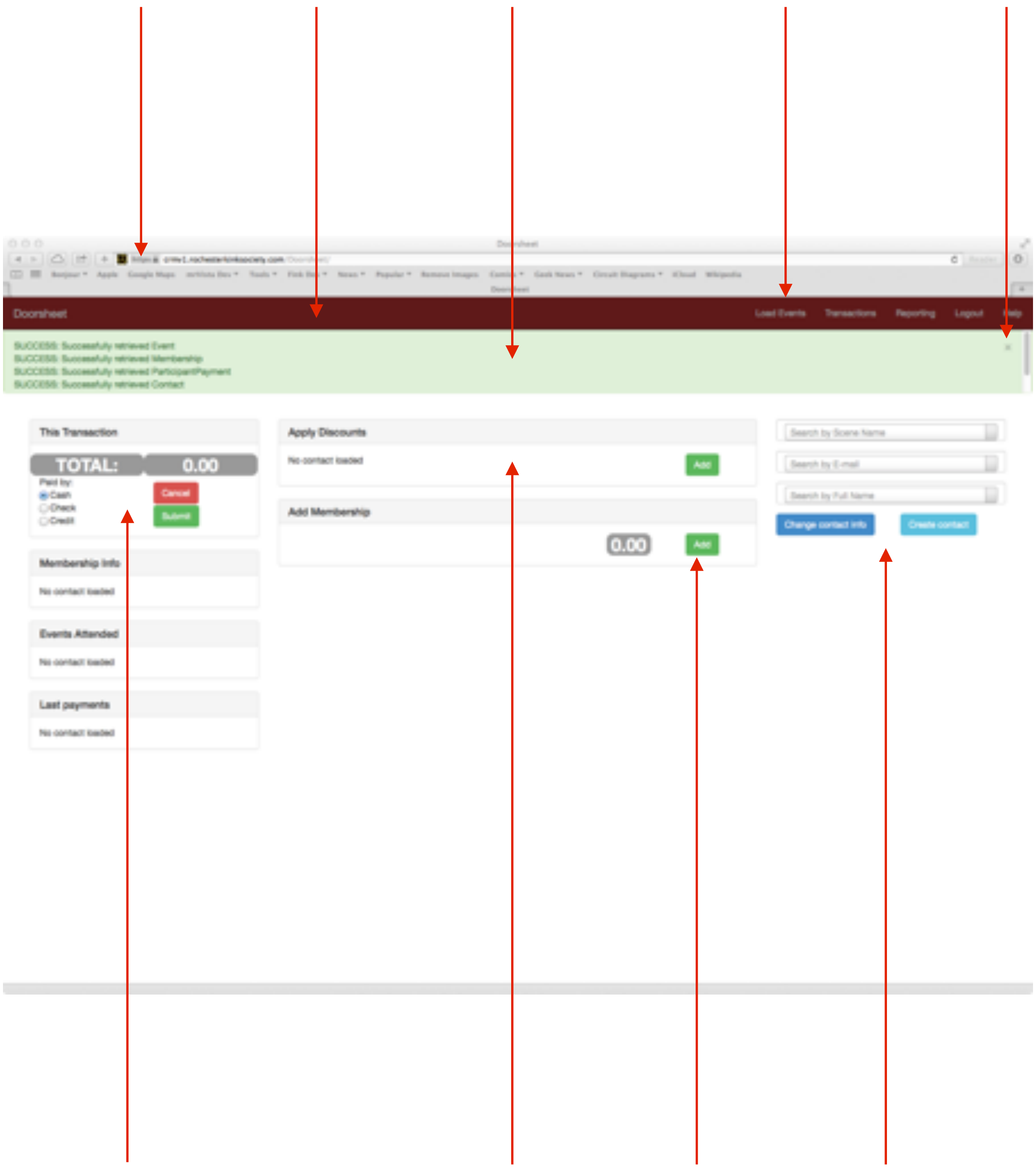
The Doorsheet is the name of our software project that has become the front end to the CRM (Customer Relationship Management) database. It is written in HTML5 and relies heavily on JavaScript.

Any browser you use (whether mobile or desktop) has to support at least HTML5 and JavaScript 1.8.6 with LocalStorage.

Typically the latest versions of Safari and Chrome will be the fastest solutions, Firefox should work well also. DO NOT use Internet Explorer, even though it should work well in IE11 or later, IE may still have some latent bugs, unsupported features and performance issues.

Doorsheet Layout

HTTPS indicator Activity indicator Log Feed Activity Buttons Close Feed



Transaction Details Event Listing Add to Transaction Contact Search

First Time Setup

You will first receive an e-mail with a one-time link to our backend. Login there and set up a password.

Go to the Doorsheet (there is a link in the backend as well), you will be asked a login and password, login again. You have to login twice as the Doorsheet is an offline client and not part of the backend website.

An API key will be generated and you will be presented with an error which says that your account does not have access. You can send (copy and paste) this key to anyone with administrator privileges to the database and they will enter the key for you. Once this has been completed, you will be able to login and use the Doorsheet.

Interface

HTTPS indicator: Most browser will have an indicator that you are securely connected to the site. If that indicator is not present, it may mean you are using a non-encrypted connection. All connections will fail if that is the case and you will be presented with an error

Activity Indicator: As you may have noticed, the black bar will alternate to red when connecting to the database. This happens whenever there is database read or write activity. It is perfectly fine to continue working while the database is processing in the background.

Log Feed: The log feed gives feedback as transactions are being processed. Usually this will be a green block. You may close the blocks by pressing the **Close Feed** button. They will reopen whenever new log messages are passed.

If a red or yellow block appears, this indicates an error or warning respectively. Errors should not be ignored as this usually means one of the last transactions may not have been processed completely. Make a note of all errors that appear and verify the transaction you just processed in the Backend. If your transaction was not processed, reload the Doorsheet and try again.

Activity Buttons: Activity buttons allow you to toggle additional screens. You press once to make it appear, once again to make it disappear.

Contact Search: This allows you to search by contact. You can query e-mail, name or scene name from any list or scroll through the respective lists as ordered lists.

Add to Transaction: Each event in the **Event Listing** will have it's own block with individual price lists. Additionally there is also a discount block (for RBucKS and Guest Passes) and Membership Options (for new or renewing memberships). Each will have the Add button which adds it to the **Transaction Details**.

Transaction Details: Once you have added a few transactions, this will display a total cost as well as options for *Cash*, *Credit* or *Check*. Once you click *Submit* it is processed in the database. Do not close the window until all the transactions have processed. If you need to modify the transactions, you can do so in the backend.

Setting Up for a Party

To begin, go to the Doorsheet URL. Login and wait until all the data is loaded (cached). For speed and reliability all data from the database is cached locally. This means however that data from other sources (such as an instance of the Doorsheet on another computer) is not automatically synchronized. To synchronize, logout the Doorsheet, then login again or go back and forth between the Reporting status (which does synchronize everything).

Click on *Load Events* from the **Activity Buttons**. A list with events will be loaded. Events within the past and next 24 hours will be highlighted, older events will be crossed off. Check the boxes for all the events you are processing and click the *Load* button. This will generate the price set containers for each event.

Once people need to be checked in, find them in the **Contact Search** container. Special memberships and expired or nearly-expired memberships will make the Membership Info container change color or flash. Click the appropriate radio buttons, click *Add*. Once the transaction has been completed and payment accepted, press the *Submit* button.

Each individual transaction can be removed from the list by clicking the *X* in it's container. To cancel the entire transaction, click the red *Cancel* button.

Closing a Party/Reporting

Once you are done with all the transactions for one or more events, you can click on *Reporting* to generate the Report. The report reloads all the data from the backend. You can optionally click "Mail to Board" to mail the report to the board.

Modifying a Transaction

Sometimes it may be necessary to modify a particular transaction. Maybe you entered it as Credit and it should've been Cash or vice versa.

If you haven't closed your browser yet or it hasn't been more than 24 hours, you can go to Transactions in the Doorsheet which should load the transactions with the latest one first on the list.

Most likely you're looking for a "Contribution" transaction, you can click the link that appears next to it and it will open the page in the Backend. Modify the transaction there. Most likely you do not need to Delete the transaction - transactions may send out automatic receipts which if the related transaction disappears could cause accounting issues. Either fix the transaction or if it was a duplicate, set the transaction to $0 if necessary and leave a note in the Note field.

If you can't find the transaction in the transaction list, go directly to the Backend and try to find the appropriate transaction, then modify it. See further on how to do that.

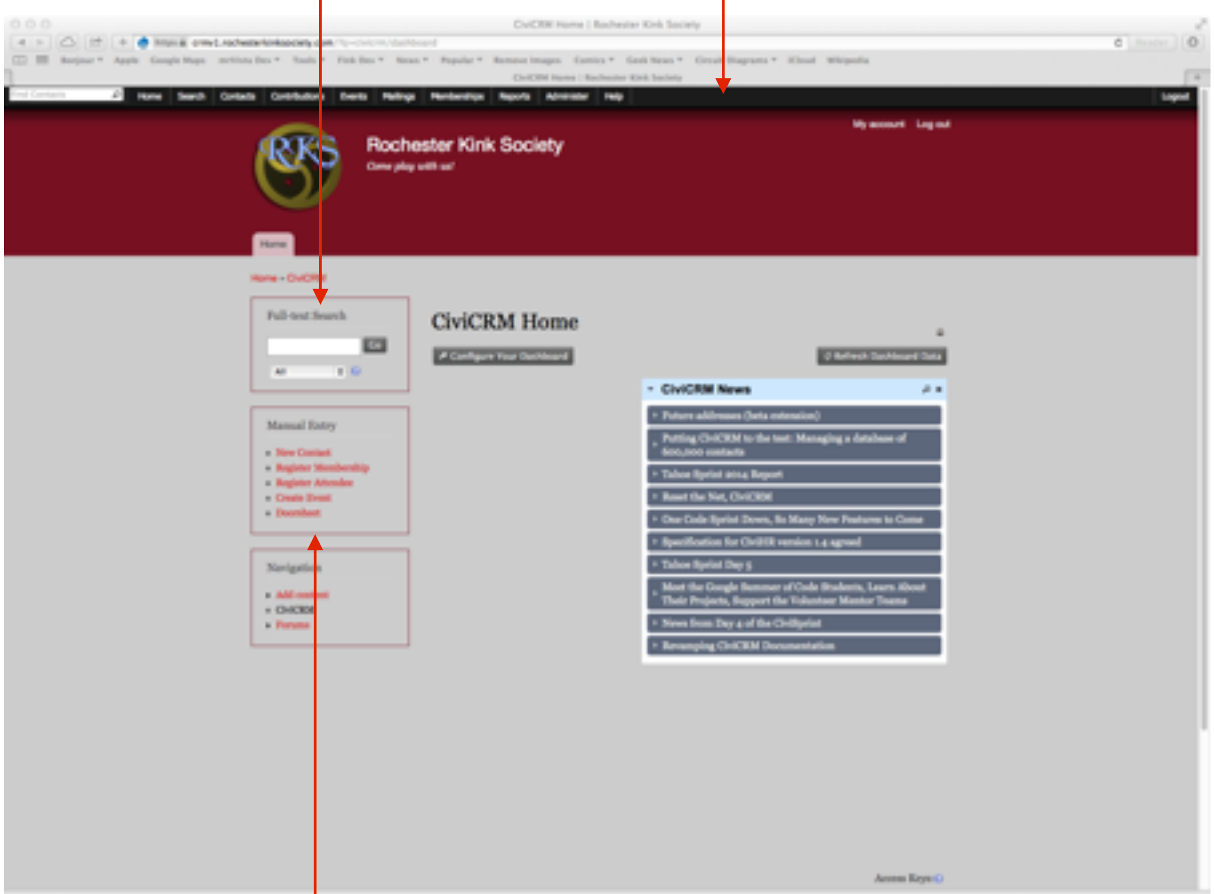
The Backend

The Backend is a combination of several web-based systems. One of them is Drupal and the other one is CiviCRM. You will interact with Drupal for logging in, forums, polls and other content while CiviCRM is the actual database.

Login to the backend using the URL above, then click CRM (Backend) from the Board Dashboard menu. This should bring you to the screen pictured below. If you do not see the Board Dashboard area, you do not have enough permissions, contact and Administrator for further help.

Full Text Search

CiviCRM Menu



Board Dashboard

You can use Full Text Search to find Contacts, Events and other data contained in the database. CiviCRM menu will have all options for everything you can do with the data (it's quite extensive). The Board Dashboard will show you a list of commonly used options.

Creating a Contact

At the basis of every interaction with the database is a Contact. A contact does not have to be an active member. You can insert any number of names and e-mail addresses in there. To create a Contact either click the *New Contact* link from the **Board Dashboard** menu for an abbreviated version or click on *Contacts* -> N*ew Individual* from the **CiviCRM Menu** for an extended version. The extended version allows you to insert additional data and set features such as "Banned" and "No guests allowed" as well as leave notes, set tags and preferences.

For example, you can input all approved guests before a party, that way the person at the door won't need to enter their information again.

Creating an Event

To create an Event you can either click on *Create Event* from the **Board Dashboard** or *Events* -> *New Event* from the **CiviCRM Menu**.

This will bring up a page where you can create the event details. You should always select a Template. Templates fill out all the tedious information and will make sure there are less mistakes. Additional templates can be created but should be verified by an IT person or the Database Manager for correctness.

On the first page, make sure you set both a correct Start Date and an End Date. If you do not set an End Date, the event will be listed forever and cannot be automatically created on Google Calendar or FetLife

On the second page you can put in location and contact info which is currently set to Rochester, NY. You could enter a full address but this address may be published online.

When you click on Fees you can select multiple options. You can change the Price Set on the bottom.

DO NOT set the price set to -none- and manually fill out the numbers. If the pricing options have to change, it's easier to change a Price Set than changing individual events. The Doorsheet will not work with the manual option. If there is no Price Set that fits your event, create a new Price Set first. You can save your Event and come back later to change the Price Set.

Creating/Changing a Price Set

To create or change a Price Set, go to *Events -> Manage Price Sets* from the **CiviCRM Menu**. There are several Price Sets available. You can click View and Edit Price Fields to change Price Fields or click Add Set of Price Fields. It's always good to re-use existing data where possible and be as generic as possible. It's more concise to make a Price Set named "Party Fee 10/25/35" than "May 1st 2014 Party". It is clear that "Party Fee 10/25/35" has a $10, $25 and $35 option (probably members, discount members, guests) while the other is only event-specific even though we may in the future have parties with the same fees.

You cannot change or delete a price set once it is assigned to an Event or Event Template. You can only do that by removing the Price Set from the events, changing/deleting it and then re-assigning other price sets to the events.

If you need help or have just created a new Price Set, make sure to inform an IT person or the Database Manager to verify and update price sets. When online payments are implemented, these Price Sets may be shown to the public.

Managing Payments

Payments in CiviCRM are called Contributions. Contributions can manage all sorts of payments including gifts and donations, items sold, member dues, event fees etc.

Click on *Contributions* in the **CiviCRM Menu** for a list of options.

Most likely you'll want to *Find Contributions* to search for recent or specific Contributions. Leaving all items empty will show you all contributions starting with the most recent received ones. You can then view or edit the Contribution and change certain details such as Payment Type.

DO NOT delete a Contribution unless you're absolutely sure the transaction was bogus. Deleting a Contribution removes it completely from the transaction list which could cause an issue balancing the accounts. There may also be automation (receipts sent etc) which could cause serious accounting issues (receipts without corresponding transactions). If anything, set it to $0 and leave a Note in the Note field.

Reports and Search

The most powerful feature of CiviCRM probably sits in it's search and reporting capabilities. It is possible to search or report on all aspects of events, income, participants etc. It's also possible to generate mailings and groups based on these. If you need complex reports that currently do not exist, they can be implemented by the IT team. Click *Search* or *Report* respectively in the **CiviCRM Menu** for more details.

Mailings and SMS

CiviCRM can generate automated e-mails, text messages and manage mailings.

DO NOT attempt to create an automated message or mailing without consulting the IT team because faulty automation will seriously annoy the recipients and could overload our system or get our communication blocked by our providers. The IT team will have to develop and test each communication path.