

# CiviCRM Training

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## ARCS Foundation

West Monroe Partners  
August 2011

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## Document Library

The document library is similar to looking into a file folder on a common PC. The links under the document library on the main navigation take you to different file folders. You may also navigate anywhere within the document library by simply using the **expand** or **compress** folders on left-hand side of the document library page. Clicking on one of the folders in the left navigation will open the contents on the main part of the page. To upload a file, click the **File Upload** link at the bottom left. The three buttons on the top right of the page are **New Folder**, **Add files in this folder to the database**, and **Recursive add files in this folder to the database** respectively. A confirmation popup will appear if you click one of the buttons to add files to the database.

### SCHOLARS AND ALUMS

Right-click (Opera: Alt+Left) on files or folders opens the context menu.  
[settings...][more help...]

global

global

documents

Administrative Documents

Administrative Templates

Business and Community

Business Community Part

Committee Documents

Development

Events

Financial Information

Global Documents

Historical Records and Re

Marketing

Media Library

Membership

National

New Chapter Developmer

Operations

Scholars and Alums

test-directory

University Partners

Work in Progress

global

/ global / documents / Scholars and Alums

Name	Modified	Size	Owner
Reva Test	17/08/11 12:29		
Scholars 2011	17/08/11 15:17		
Scholars 2012	22/08/11 14:35		
chicago_skyline16.jpg	16/08/11 13:13	372 KB	revaportland
create_content_1.png	17/08/11 11:45	88 KB	revaportland
redmine_update_8-9_am.csv	17/08/11 12:29	21 KB	revaportland
sputnik_asm720.jpg	15/08/11 14:29	34 KB	revaportland

File Upload

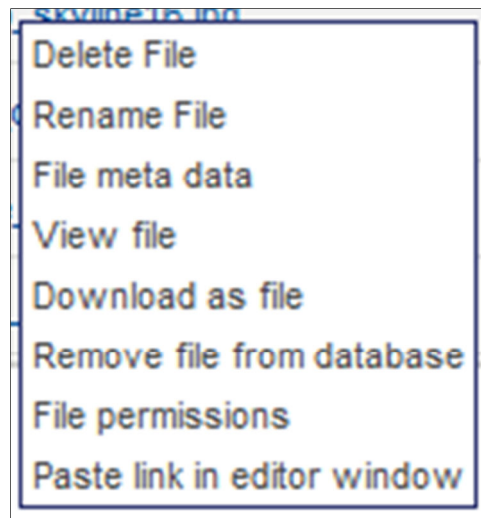
When you upload a document to the document library, it does not get added real time to the database. It can either get added every hour by a batch job that runs in the background OR you can click on the



button to “Add files in this folder to the database”. Clicking the button will add the document immediately and have it viewable by others.

You can use the button called “Create new folder” to add subfolders to the document library. You may not add any options to the Document Library (these have been defined and may only be changed as per a decision from the Information Strategies Committee). Please follow the naming conventions outlined in the Website and Database Governance document.

If you right click on a document, you will have the following options:

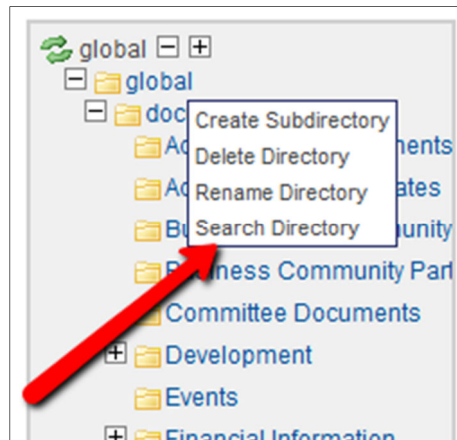


Here are some important things to note about a few of the following options:

- File meta data – You can use this option to add keywords in the *Description* box once you open up the meta data. These keywords will be searchable for the end user.
- Remove file from database – Deleting a file will remove it from the user interface view. If you want to remove a document entirely, you can use this option
- File Permissions – Permissions have been set at the Document Library level, there is no need to set file level permissions.
- Paste link in editor window – This option has been disabled

When searching for a document, you can either:

1. Search in the global search box at the top right hand corner of the webpage and then click on Documents. This will search h file names and keywords.
2. Right click on the directory on the left hand side of the document library and select “search directory”. This will search file names only. Be careful not to delete, rename or add any directories.



As part of the system's functionality, your chapter will have the ability to decide if you want your chapter's document open to other chapters or not. This means that other chapters may navigate to your document library and peruse the documents (except the *Financial Document* folder which will remain under strict security). As a default, all chapters are set to share their Document Library with other chapters. If you want to change this to make it private, please contact the webmaster to update your chapter's settings.

## Events & Calendar

### Private and Public Calendars

When creating an event content type for the calendar, you will have the option on whether or not you want that event to be viewable by only ARCS Members at your chapter or if you want the event to be public.

The private calendar appears on the secure site upon login. If you decide to make an event public, it will appear on your private calendar AND will be added to your chapter's public site calendar as well as the national calendar. The national calendar is viewable on the secure site and the public site.

### Viewing a Calendar

The Calendar will have all events with links (red arrow) for more details about the events (past or present). Use the month/year dropdown fields or the arrows at the top of the page to navigate the calendar. Also, to view the events in a list view click the **List** tab on the top right side of the page (green arrow). The end user can toggle between the different views of the calendar. The view will default to Table for the National Calendars and will default to List for Chapter Calendars.

**UPCOMING NATIONAL EVENTS**

Table List

July 2011

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
					1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29 Send to national Send to national Send to national	30

## New and Existing Events

## EVENT DASHBOARD

The event dashboard, similar to the other dashboards in this manual, is a great way to see a summary of events and allows the user to manage the events. By clicking on **Configure** you can edit most of the options that are available when initially creating the event. The bottom half of the page shows recent registrations and contact information of those individuals.

CIVIEVENT

Event Summary

Manage Events

New Event

Event	ID	Type	Public	Date(s)	Participants
Testing Event	11	Fundraiser	No	July 14th, 2011	Counted: 0 Not Counted: 0 <a href="#">Configure</a> Not Counted Due To Status: 0 Not Counted Due To Role: 0
Science exhibition	8	Exhibition	Yes	July 15th, 2011 to July 31st, 2011	Counted: 0 Not Counted: 0 <a href="#">Configure</a> Not Counted Due To Status: 0 Not Counted Due To Role: 0
test public with restricted number participants	12	Conference	Yes	July 19th, 2011 to July 29th, 2011	Counted: 1 Not Counted: 0 <a href="#">Configure</a> Not Counted Due To Status: 0 Not Counted Due To Role: 0 Registered: 1 (max 1)

Recent Registrations

Participant	Event	Fee Level	Amount	Registered	Event Date(s)	Status	Role	
<a href="#">steve</a>	<a href="#">test public with restricted number participants</a>	(no fee)		July 19th, 2011	July 19th, 2011 - July 29th, 2011	Registered	Attendee	<a href="#">View</a> <a href="#">Edit</a> <a href="#">Delete</a>
<a href="#">Testy. BethScholar</a>	<a href="#">Reva's Conference</a>	Day One - Silver Package: 1 Bruno's Extra Cost: 1	\$ 1,010.00	July 19th, 2011	June 15th, 2011	Registered	Speaker	<a href="#">View</a> <a href="#">Edit</a> <a href="#">Delete</a>
<a href="#">steve</a>	<a href="#">Test event</a>	Registration Fee ARCS Event	\$ 200.00	June 8th, 2011	June 15th, 2011 - June 22nd, 2011	Pending from pay later	Attendee	<a href="#">View</a> <a href="#">Edit</a> <a href="#">Delete</a>

## REGISTER EVENT PARTICIPANT

Registering a new participant adds a contact to a particular event. All events that are available for registration will be populated in the event drop-down field. Once a participant is registered, an email confirmation will be sent immediately.

## REGISTER NEW PARTICIPANT

New Event Registration

Save

Save and New

Cancel

Select Contact

OR

- create new contact -

Event \*

- select -

» Include past event(s) in this select list.

Participant Role \*

☐ Attendee
 ☐ Volunteer
 ☐ Host
 ☐ Speaker

Registration Date \*

07/19/2011

Time \*

09:44PM

(clear)

Participant Status \*

Registered

Event Source

Source for this registration (if applicable).

Notes

Save

Save and New

Cancel

## NEW EVENT REGISTRATION FORM

When creating an event, there are five pages that can be used to configure an event (many of the pages are optional). After completing a page, you may select **Save** to save progress without completing the event setup or **Save and Done**. Saved events can be accessed through the event management page and completed at another time. Don not click **Save and Done** until you have completed all the appropriate pages for your event.

If you are creating an event, please note that a contact record will be created for any registrants that are not already in your contact database. This will be especially important for the National Board to keep in mind when creating an event for NAM.

Once you are finished creating your event, you will have full control over where the registration link appears. If you want the invitation to be open to the public, you can post it to your public facing website. If you want the invitation to be private, you can send the link over email so it does not appear on your public site. If it is a members only event, you can post the link in a member announcement and/or a private calendar event such that it is only viewable when members login.

**Page 1: Info and Settings.** The first step to creating a new event is selecting the **Event Type**. Specific event types are: Conference, Exhibition, Fundraiser, Meeting, Performance, and workshop. The page will

display custom event fields depending on the event type. The **Participant Role** is automatically assigned to people when they register online for the event (usually the default 'Attendee' role). To allow users to see a listing of participants, set the **Participant Listing** field to 'Name' (list names only), 'Name and Email', or 'Name, Status and Register Date'. **Event Title** must be included and the **Event Summary**, **Complete Description**, and **Date/Time** fields are recommended.


Optionally set a **Max Number of Participants** for this event. You may allow users to join a waitlist when the event is full. To enable this feature you must first enable the Participant Statuses used by the waitlist work-flow. You will need to contact the webmaster to help you set up the Participant Status rules. Then reload this form and check 'Offer a Waitlist?'. Otherwise, the registration link is hidden and the "Event Full Message" is displayed when the maximum number of registrations is reached. Only participants with status types marked as 'counted' are included when checking if the event is full.



A **Map** can be included presenting event location on the event information page as long as a map provider is configured. If this is not configured properly, please contact the webmaster to update your settings. Finally, configuring an Event as **Public** allows anyone to sign up for the event and the event is included in iCalendar feeds. Labeling the event as **Active** makes registration for the event available as soon as the event is fully configured.



## NEW EVENT

**i** If you find that you are creating multiple events with similar settings, you may want to use the [Event Templates](#) feature to streamline your workflow.

[Continue >>](#) [Cancel](#)

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









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







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


Event Title \*  Please use only alphanumeric, spaces, hyphens and dashes for event names.

Event Summary


Complete Description

**B I U** Font  Size         


      


 

body p

Start Date 07/19/2011  Time 09:45PM [\(clear\)](#)

End Date / Time   Time  [\(clear\)](#)

Max Number of Participants  

☐ Include Map to Event Location? 

☐ Public Event?

Include this event in iCalendar feeds?

**Page 2: Event Location.** Use this page to configure the location and optional contact information for the event. This information will be displayed on the Event Information page. It will also be included in online registration pages and confirmation emails if these features are enabled.

If you are hosting an event at a previously used location, select the **Use existing location** option at the top and select your location from the dropdown list. Fields completed for the previous event will automatically populate. Otherwise, enter location information into the suggested fields (none are



required). At the end of the page, UNSELECT the **Show Location** box if you want to HIDE the event Address on Event Information and Registration pages as well as on email confirmations.

SaveSave and DoneCancel

Choose Location
☒ Create new location
☐ Use existing location

### Address

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

Add'l Address 1
Supplemental address info, e.g. c/o, department name, building name, etc.

Add'l Address 2
Supplemental address info, e.g. c/o, department name, building name, etc.

City
Zip / Postal Code

Enter optional 'add-on' code after the dash ('plus 4' code for U.S. addresses).

Country
State/Province

Latitude, Longitude

Latitude and longitude may be automatically populated by enabling a Mapping Provider. ([learn more...](#))

Email

Phone

Show Location?
☒
Uncheck this box if you want to HIDE the event Address on Event Information and Registration pages as well as on email confirmations.

SaveSave and DoneCancel

**Page 3: Fees.** This page only needs to be completed if the event is a paid event. If this is a paid event and you want users to be able to register and pay online, select a payment processor to use. Otherwise, you can enable the **Pay Later** feature without setting up a payment processor. If pay later is enabled, all users will then be asked to submit payment offline (e.g. mail in a check, call in a credit card, etc.) The **Fee Label** is displayed with the list of event fees. The **Pay later label** is the text displayed next to the checkbox for the 'pay later' option on the contribution form. **Pay later instructions** are added to

Confirmation and Thank-you pages when the user selects the 'pay later' option (e.g. 'Mail your check to ... within 3 business days.').

Within the **Price Set** field, select a pre-configured Price Set to offer multiple individually priced options for event registrants (see Price Sets section in the first volume of this manual). Otherwise, select "-none-" and enter one or more fee levels in the table below. For example, advanced membership - \$500, regular membership -\$300, limited membership-\$200 (these will be the options users can select). Create or edit Price Sets by navigating Manage Contacts>> Contributions>> New Price Set.

Info and Settings
Event Location
**Fees**
Online Registration
Tell a Friend

Save
Save and Done
Cancel

---

Paid Event ☒ Yes ☐ No

Currency 
Select the currency to be used for event registration.

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

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

Fee Label \* 
This label is displayed with the list of event fees.

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

Pay Later Label \* 
Text displayed next to the checkbox for the 'pay later' option on the contribution form.

Pay Later Instructions \* 
Instructions added to Confirmation and Thank-you pages when the user selects the 'pay later' option (e.g. 'Mail your check to ... within 3 business days.').

Price Set 
Select a pre-configured Price Set to offer multiple individually priced options for event registrants. Otherwise, select "-none-" and enter one or more fee levels in the table below. [Create or edit Price Sets here.](#)

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### Regular Fees

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

Fee Label	Amount	Default?
<input type="text"/>	\$ <input type="text"/>	<input checked="" type="radio"/>
<input type="text"/>	\$ <input type="text"/>	<input type="radio"/>

**Page 4: Online Registration.** If you want to provide an **Online Registration** page for this event, check the first box on this page and then complete the appropriate fields. You can offer online registration for

both Paid and Free events. Paid events require that you have configured a payment processor for your site.

Check the **Register multiple participants** box to allow users to register themselves AND additional participants for an event. When this feature is enabled, users have the option to specify the number of additional participants they are registering for. If this is a paid event, they can select a different event fees for each participant - and will be charged the total of those fees. If a profile is included - they will complete the profile information for each participant 'Registration Link Text' will display text for link from Event Information to Event Registration pages (e.g. 'Register Now!')

**Pending participant expiration (hours)** is the time limit (in hours) for confirming/finishing registration by participants with any of the pending statuses. Enter 0 (or leave empty) to disable this feature.

**Introductory Text** is an initial message and instructions for the online event registrations page. If you want collect additional information during event registration, you will need to include one or two CiviCRM **Profiles**. These profiles will require registrants to provide contact info, basic information about themselves, involvement, etc. when registering. A profile can be included at the top of the page immediately after the introductory message or at the bottom of the page.

The 'Confirmation Screen' will be the screen where the registrant reviews and confirms their registration information. **Title** is required and **Introductory Text** and **Footer Text** are optional.

The 'Thank-you Screen' will appear after the user has confirmed their event registration. **Title** is required and **Introductory Text** and **Footer Text** are optional. **Footer Text** is often used to include links to other pages or activities on the site.

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

**Thank-you Screen**

Title \*

Page title for registration Thank-you screen.

Introductory Text

B I U Font Size A A [Icons]

[List Icons] ABC Source [Search Icon] [Help Icon]

---

body p

Optional message for Thank-you screen (may include HTML formatting).

Footer Text

B I U Font Size A A [Icons]

[List Icons] ABC Source [Search Icon] [Help Icon]

---

body p

Optional footer text for Thank-you screen (often used to include links to other pages/activities on your site).

**Confirmation Email**

Send Confirmation Email? ☐ Yes ☒ No

Do you want a registration confirmation email sent automatically to the user?

This email includes event date(s), location and contact information. For paid events, this email is also a receipt for their payment.

Save Save and Done Cancel

**Step 5: Tell a Friend.** Tell a Friend gives registering participants an easy way to spread the word about this event. The registration thank-you page will include a link to a form where they can enter their friends' email addresses, along with a personalized message. CiviCRM will record these solicitation activities, and will add the friends to your database. The **Title, Introduction, Suggested Message, Thank-you Title, and Thank-you Message** are already completed with suggested text. A link to the Event

Information page is automatically included in the email sent to friends. If you ALSO want to include a link providing general information about your organization, enter that link in the **Info Page Link** field.

Info and Settings	Event Location	Fees	Online Registration	Tell a Friend
-------------------	----------------	------	---------------------	---------------

Tell a Friend gives registering participants an easy way to spread the word about this event. The registration thank-you page will include a link to a form where they can enter their friends' email addresses, along with a personalized message. CiviCRM will record these solicitation activities, and will add the friends to your database.

Save
Save and Done
Cancel

---

☒ Tell a Friend enabled?

**Title \***

**Introduction**  

Help us spread the word about this event. Use the space below to personalize your email message - let your friends know why you're attending. Then fill in the name(s) and email address(es) and click 'Send Your Message'.

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

**Suggested Message**  

Thought you might be interested in checking out this event. I'm planning on attending.

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

**Info Page Link**  


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

**Thank-you Title \***

**Thank-you Message**  

Thanks for spreading the word about this event to your friends.

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

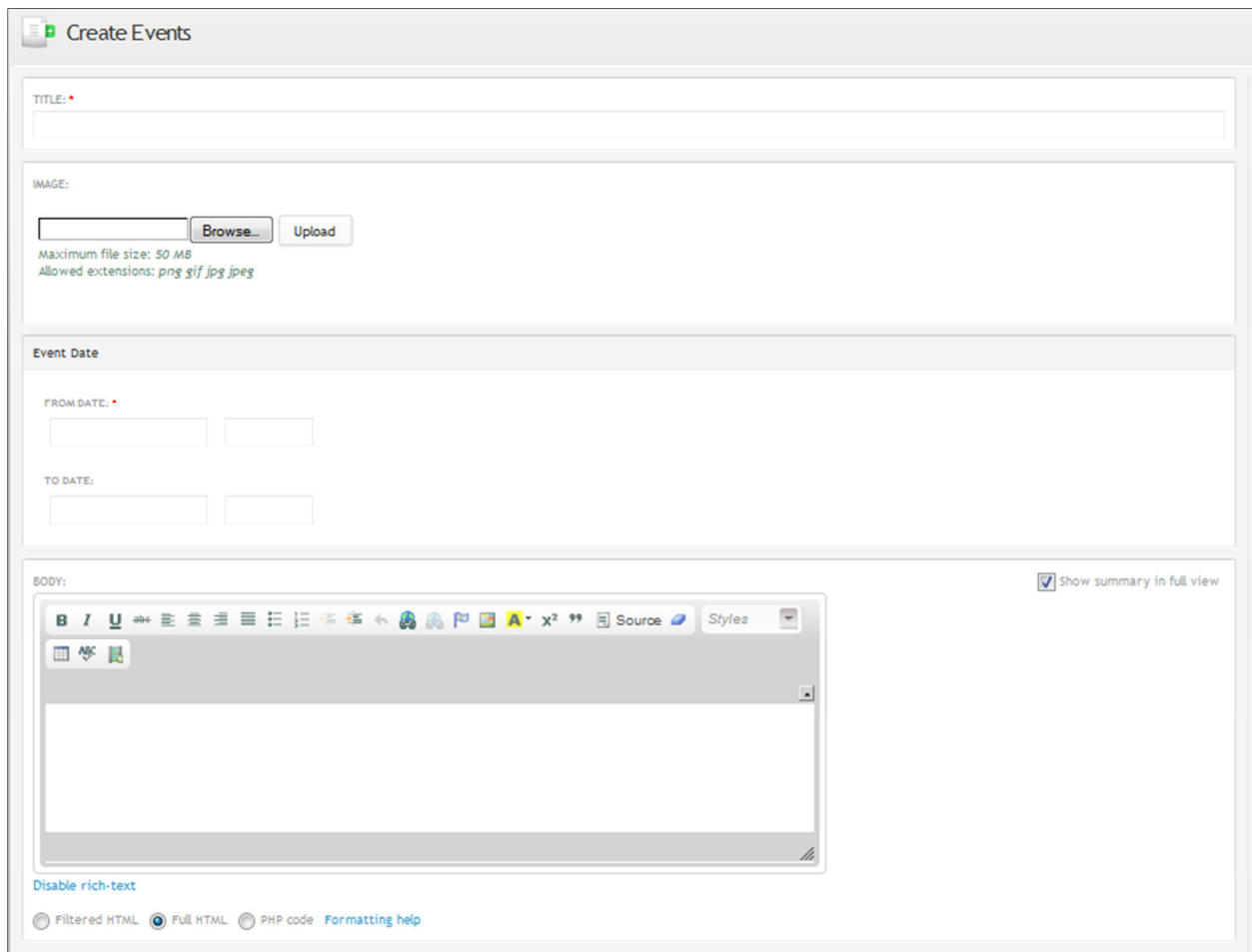
Save
Save and Done
Cancel

## ADD EVENT TO THE CHAPTER OR NATIONAL CALENDAR

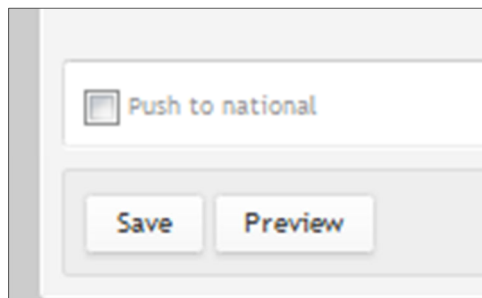
This page will allow you to add both a public or private event to the calendar. You must fill in the title and date of the event at bare minimum and can also upload an image, the event time, and provide a description of the event. If you are using online registration for an event, this is a good place to copy/paste the registration link to.

20 | Page





If you select **Push to national** (all the way at the bottom of the page), it is the same as stating 'this is a public event'. In your private calendar, you see all events; Public and private. This way, we can expose the public calendar to all and a logged in member can still see a separate, single calendar with both private and public events without having to navigate between the 2 calendars. Finally, events will only populate the calendar if they are saved.



## MANAGE EVENTS

The manage events page allows the user to sift through events by entering the name of the event, picking the event type, or choosing the first letter of the event name. Once the user has found the event

they are searching for, they can edit or alter the event just as they could have when they were initially creating the event.

## MANAGE EVENTS

### Find Events

*Complete OR partial Event name.*

☒ Show Current and Upcoming Events  
☐ Search All or by Date Range

Event Type

- ☐ Conference
- ☐ Exhibition
- ☐ Fundraiser
- ☐ Meeting

A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T	U	V	W	X	Y	Z	All
Event	City	State/Province	Public?	Starts	Ends	Active?																				
<a href="#">test public with restricted number participants</a> (ID: 12)			Yes	Jul 19, 2011 4:51 PM	Jul 29, 2011 12:00 AM	Yes	<a href="#">Configure</a> ▶ <a href="#">Participants</a> ▶ <a href="#">Event Links</a> ▶ <a href="#">more</a> ▶																			
<a href="#">Science exhibition</a> (ID: 8)	Chicago	Illinois	Yes	Jul 15, 2011 2:45 PM	Jul 31, 2011 12:00 AM	Yes	<a href="#">Configure</a> ▶ <a href="#">Participants</a> ▶ <a href="#">Event Links</a> ▶ <a href="#">more</a> ▶																			
<a href="#">Testing Event</a> (ID: 11)	Chicago	Illinois	No	Jul 14, 2011 10:58 AM		Yes	<a href="#">Configure</a> ▶ <a href="#">Participants</a> ▶ <a href="#">Event Links</a> ▶ <a href="#">more</a> ▶																			
<a href="#">Reva's Coference</a> (ID: 4)	Chicago	Illinois	No	Jun 15, 2011 7:03 PM		Yes	<a href="#">Configure</a> ▶ <a href="#">Participants</a> ▶ <a href="#">Event Links</a> ▶ <a href="#">more</a> ▶																			
<a href="#">Copy of Reva's Coference</a> (ID: 5)	Chicago	Illinois	No	Jun 15, 2011 7:03 PM		Yes	<a href="#">Configure</a> ▶ <a href="#">Participants</a> ▶ <a href="#">Event Links</a> ▶ <a href="#">more</a> ▶																			

## EVENT TEMPLATES

This is the same as creating an event except that you can save it as a template to reuse. If you find that you are creating multiple events with similar settings, you may want to use the Event Templates feature to streamline your workflow.

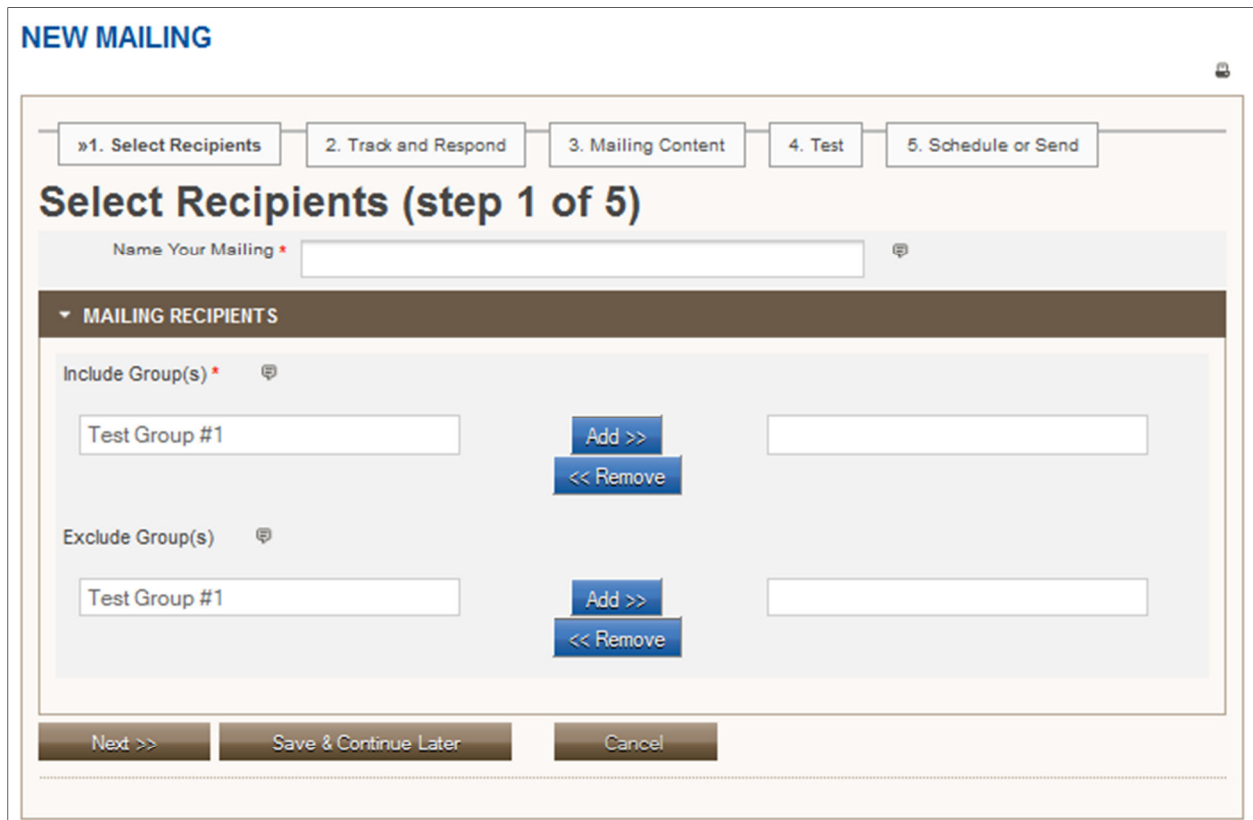
## Past Events and Silent Auctions

These are basic content pages for your chapter to store information for member eyes only. You can disable these pages if your chapter does not want to use them.

## Manage Mailings

### New Mailing

**Step 1: Select Recipients.** After navigating to the 'New Mailing' page, the user will initially see the page shown below. To start drafting a new email, type the **Name of Your Mailing** (at the top), **Include Groups** you would like to send the mailing to, and click the **Add** button. If it is more convenient, the user could first select all, and then exclude certain groups.



The screenshot shows the 'NEW MAILING' interface. At the top, there's a progress bar with five steps: 1. Select Recipients (active), 2. Track and Respond, 3. Mailing Content, 4. Test, and 5. Schedule or Send. Below the progress bar, the title 'Select Recipients (step 1 of 5)' is displayed. A text input field labeled 'Name Your Mailing \*' is at the top. Below this is a section titled 'MAILING RECIPIENTS'. Under 'Include Group(s) \*', there's a text input field containing 'Test Group #1', an 'Add >>' button, and a '<< Remove' button. To the right of the 'Add >>' button is an empty text input field. Below the 'Include' section is an 'Exclude Group(s) \*' section, which also contains a text input field with 'Test Group #1', an 'Add >>' button, and a '<< Remove' button, followed by another empty text input field. At the bottom of the form, there are three buttons: 'Next >>', 'Save & Continue Later', and 'Cancel'.

**Step 2: Track and Respond:** Track and respond preferences are identified on this page. The user has the option to track **Click-throughs**, **Track opens**, and **Track replies**. Tracking click throughs will record the number of times links within an email are accessed. CiviCRM does this by routing the link to the Civi database before redirecting to the linked page. Tracking opens records the number of times an email is opened. Finally, Tracking Replies sends recipients' email replies to a Civimail address instead of the sender's address so they can be stored within CiviCRM.

NEW MAILING

1. Select Recipients
2. Track and Respond
3. Mailing Content
4. Test
5. Schedule or Send

## Track and Respond (step 2 of 5)

These settings control tracking and responses to recipient actions. The number of recipients selected to receive this mailing is shown in the box to the right. If this count doesn't match your expectations, click [Previous](#) to review your selection(s).

### Tracking

Track Click-throughs? ☒

Track the number of times recipients click each link in this mailing. NOTE: When this feature is enabled, all links in the message body will be automatically re-written to route through your CiviCRM server prior to redirecting to the target page.

Track Opens? ☒

Track the number of times recipients open this mailing in their email software.

Total Recipients: 0

### Responding

Track Replies? ☐

Recipients' replies are sent to a CiviMail specific address instead of the sender's address so they can be stored within CiviCRM.

<< Previous
Next >>
Save & Continue Later
Cancel

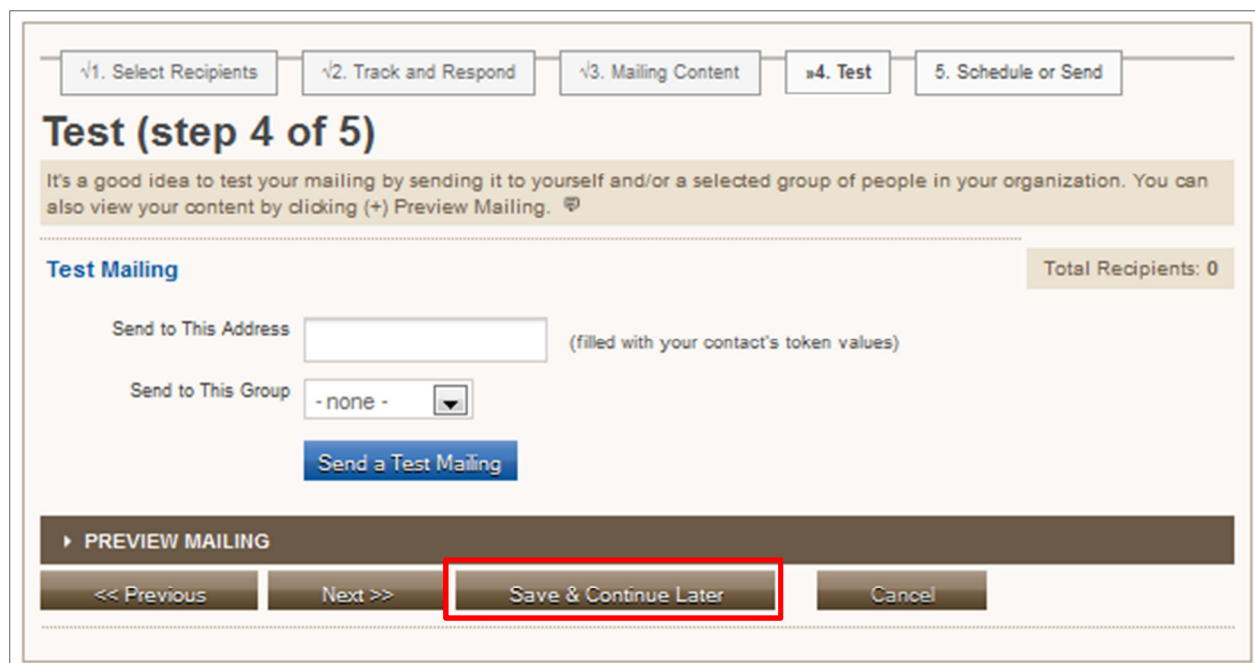
**Step 3: Mailing Content.** In this step, the user will compose the actual mailing. The **From Email Address** and the **Mailing Subject** fields must be completed. To the right of the mailing subject dialogue box, the user may select **Insert Token** (red box). Use a token in the Subject when you are sending mail to a number of recipients and want to include their name and/or other values from their contact record automatically in the subject line.

As far as creating the body content, the user has several options. The option to **use a template** is available and there will be a dropdown list containing all available templates. Selecting a template will populate the red box below with previously created content and you can make modifications as necessary. A template will not be ideal for all situations, so you can create your own mailing content from scratch. The editing toolbar is similar to word-- If you have question about the functionality of the toolbar, reference the content management training manual. **Updating a template** or **saving the mailing as a new template** is easily done by selecting one of the options beneath the 'Plain-Text Format' heading. The final way to generate mailing content is by uploading content. Clicking **Upload Content** allows the user to select content from in TEXT or HTML format (Note: these are the only formats that are compatible). An optional **Header** or **Footer** may be added to the mailing as well. Headers and footers are created and saved on another page within CiviCRM, but all available headers and footers will appear in the dropdown lists.

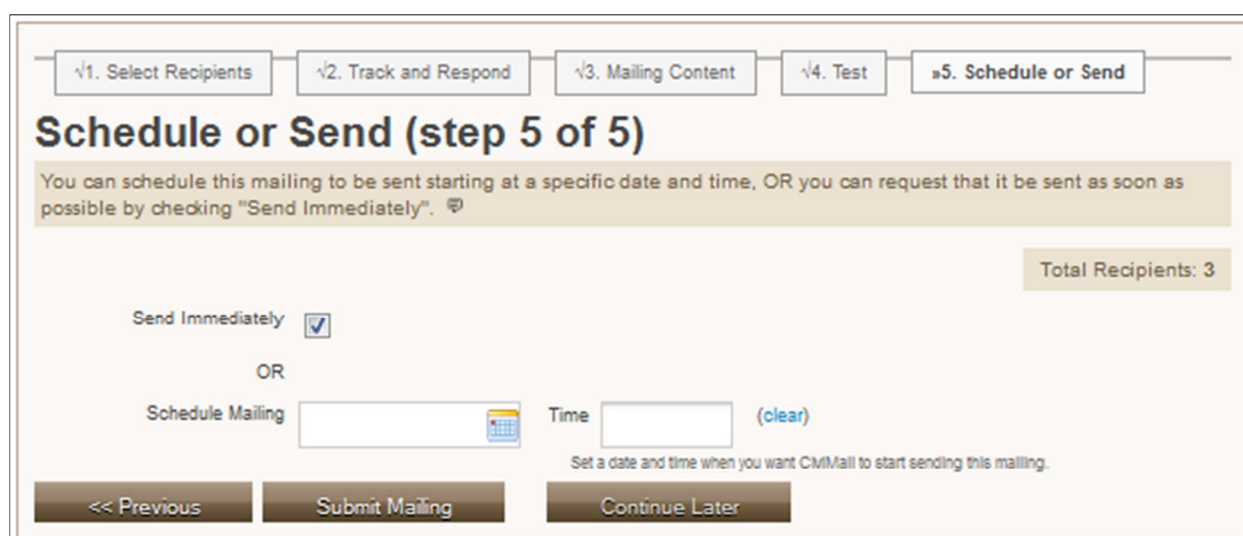
**Step 4: Test.** Test a mailing by sending the mailing you've created to a personal address or a group. This way, you can view the email just as the people receiving it would. Test mailings are particularly useful

for massive email blasts or emails with a large amount of content. Expanding the 'Preview Mailing' header will show a preview of the email. Note: The test step **is not** required.

**Additional Note:** The user may stop in the middle of the New Mailing process and save all progress by selecting the **Save & Continue Later** button (red box). The email can then be accessed by finding it on the 'Draft and Unscheduled Mailings' page.



**Step 5: Schedule or Send.** In the final step of the mailing process, the user can decide to **Send Immediately** or can set the date and time the email will be sent.



## Draft and Unscheduled Mailings

If a mailing has been partially created or was created but never sent, you can find it by filling in one or more of the search fields below. Once you identify the proper mailing, you may finish and send (or save a draft as an unscheduled mailing). Search results will appear in the area that says “There are no Unscheduled Mailings.” This is a good place to store mailings that must be reviewed by several people before final approval to send out.

### DRAFT AND UNSCHEDULED MAILINGS

New Mailing

Mailing Name

From

To

Created or Sent by

Search

There are no Unscheduled Mailings. You can [create and send one](#).

## Scheduled and Sent Mailings

Search for any scheduled and sent mailings the same way you would search drafts and unscheduled mailing (above).

### SCHEDULED AND SENT MAILINGS

New Mailing

Mailing Name

From

To


Created or Sent by

Search

There are no Scheduled or Sent Mailings. You can [create and send one](#) OR you can search the [Archived Mailings](#).

## Archived Mailings

## ARCHIVED MAILINGS



Mailing Name

From

(clear)

To

(clear)

Created or Sent by

Search

There are no Archived Mailings. You can archive mailings from [Scheduled](#) or [Sent Mailings](#).

## Headers, Footers, and Automated Messages

To streamline and standardize much of the mailing process on CiviCRM, Headers, Footers, and Automated Messages can be created and utilized. The available mail component types are Header, Footer, Reply Auto-Responder, Opt-out message, Subscription Confirmation Request, Welcome Message, Unsubscribe Message, and Resubscribe Message. All previously created mail components will be listed on this page with details. The green checkmark under default indicates that the component is automatically included as an option within appropriate mailings. A mail component that is enabled will be an available option within mailings and disabled components will not appear as options. To **disable** or **edit** a component, select one of the options in the far right column.



### HEADERS, FOOTERS, AND AUTOMATED MESSAGES

The mailing component 'Mailing Header' has been saved.

Name	Type	Subject	Body Text	Body HTML	Default?	Enabled?	
Mailing Header	Header	Descriptive Title for this Header	Sample Header for TEXT formatted content.	Sample Header for HTML formatted content.		Yes	<a href="#">Edit</a>   <a href="#">Disable</a>
Mailing Footer	Footer	Descriptive Title for this Footer.	to unsubscribe: {action.optOutUri} {domain.address}	Sample Footer for HTML formatted content- -<a href="{action.optOutUri}">Unsubscribe</a>-  {domain.address}		Yes	<a href="#">Edit</a>   <a href="#">Disable</a>
Subscribe Message	Subscribe	Subscription Confirmation Request	You have a pending subscription to the {subscribe.group} mailing list. To confirm this subscription, reply to this email or click on this link: {subscribe.uri}	You have a pending subscription to the {subscribe.group} mailing list. To confirm this subscription, reply to this email or click -<a href="{subscribe.uri}">here</a>.		Yes	<a href="#">Edit</a>   <a href="#">Disable</a>
Welcome Message	Welcome	Your Subscription has been Activated	Welcome. Your subscription to the {welcome.group} mailing list has been activated.	Welcome. Your subscription to the {welcome.group} mailing list has been activated.		Yes	<a href="#">Edit</a>   <a href="#">Disable</a>
Unsubscribe Message	Unsubscribe	Un-subscribe Confirmation	You have been un-subscribed from the following groups: {unsubscribe.group}. You can re-subscribe by mailing {action.resubscribe} or clicking {action.resubscribeUri} or clicking %3	You have been un-subscribed from the following groups: {unsubscribe.group}. You can re-subscribe by mailing {action.resubscribe} or clicking -<a href="{action.resubscribeUri}">here</a>.		Yes	<a href="#">Edit</a>   <a href="#">Disable</a>
Opt-out Message	OptOut	Opt-out Confirmation	Your email address has been removed from {domain.name} mailing lists.	Your email address has been removed from {domain.name} mailing lists.		Yes	<a href="#">Edit</a>   <a href="#">Disable</a>
Auto-responder	Reply	Please Send Inquiries to Our Contact Email Address	This is an automated reply from an un-attended mailbox. Please send any Inquiries to the contact email address listed on our web-site.	This is an automated reply from an un-attended mailbox. Please send any Inquiries to the contact email address listed on our web-site.		Yes	<a href="#">Edit</a>   <a href="#">Disable</a>
Resubscribe Message	Resubscribe	Re-subscribe Confirmation	You have been re-subscribed to the following groups: {resubscribe.group}. You can un-subscribe by mailing {action.unsubscribe} or clicking {action.unsubscribeUri}	You have been re-subscribed to the following groups: {resubscribe.group}. You can un-subscribe by mailing {action.unsubscribe} or clicking -<a href="{action.unsubscribeUri}">here</a>.		Yes	<a href="#">Edit</a>   <a href="#">Disable</a>

Add Mailing Component

To add a new component, click the Add Mailing Component button at the bottom of the page (red box above) and the page below will appear. Insert the **Name** of your new mailing component, identify the **Component Type**, fill in the **Subject** line, give the component a **Body** (both TEXT and HTML), choose whether this component will be **Default** or **Enabled**, and click **Save**. The new component will appear with the rest of the components on the page above. Once again, you will be able to edit this component at any time after it is created.

### HEADERS, FOOTERS, AND AUTOMATED MESSAGES

#### New Mailing Component

Name \*

Component Type

Subject \*

Body - TEXT Format \*

Body - HTML Format \*

Default? ☐

Enabled? ☒

## Message Templates

Message Templates are a great way to use create layouts or save emails that will be sent out many times. You can use them when sending email to one or more contacts. If you are using the CiviMail component - you can use templates for your messages. If you are using the CiviMember component, you will need to create one or more message templates for membership renewal reminders. Recall earlier in this manual (in the 'New Mailing' section), templates can be selected when creating a mailing.

**User-driven message** templates allow you to save and re-use messages with layouts. They are useful if you need to send similar emails to contacts on a recurring basis. You can also use them in CiviMail Mailings and they are required for CiviMember membership renewal reminders. All User-driven Message Templates will appear in the window below. You can edit, disable, or delete these templates at any time. Enabling a template means it will be included in the template dropdown list when users create new mailings.

### MESSAGE TEMPLATES


User-driven Messages

System Workflow Messages


User-driven message templates allow you to save and re-use messages with layouts. They are useful if you need to send similar emails to contacts on a recurring basis. You can also use them in CiviMail Mailings and they are required for CiviMember membership renewal reminders.

Message Title	Message Subject	Enabled?	
Test Template	Test Template	Yes	<a href="#">Edit</a>   <a href="#">Disable</a>   <a href="#">Delete</a>
Test Template	Test Template	Yes	<a href="#">Edit</a>   <a href="#">Disable</a>   <a href="#">Delete</a>

Add Message Template

Access Keys: 

Create a new template by clicking the Add Message Template button at the bottom of the page. The New Message Template window will appear and the user can craft the template by filling in the appropriate fields. After saving, the new template will appear in the list of templates above.

Use this form to add or edit re-usable message templates. 

### New Message Template

---


Message Title \*

Message Subject  Insert Tokens


Descriptive title of message - used for template selection.


Subject for email message. Tokens may be included ([token documentation](#)).




















**PLAIN-TEXT FORMAT**








[Insert Tokens](#) 

Text formatted message. Tokens may be included ([token documentation](#)).

**HTML FORMAT** 

[Insert Tokens](#) 




 Font 
 Size 
















You may optionally create an HTML formatted version of this message. It will be sent to contacts whose Email Format preference is 'HTML' or 'Both'. Tokens may be included ([token documentation](#)).

Enabled? ☒

**System workflow message** templates are used to generate the emails sent to constituents and administrators for contribution receipts, event confirmations and many other workflows. You can customize the style and wording of these messages here. Workflow messages include text 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.

User-driven Messages

System Workflow Messages

System workflow message templates are used to generate the emails sent to constituents and administrators for contribution receipts, event confirmations and many other workflows. You can customize the style and wording of these messages here. 

Workflow

Cases - Send Copy of an Activity	Edit
Contributions - Duplicate Organization Alert	Edit
Contributions - Receipt (off-line)	Edit
Contributions - Receipt (on-line)	Edit
Contributions - Recurring Start and End Notification	Edit
Events - Pending Registration Expiration Notice	Edit
Events - Registration Cancellation Notice	Edit
Events - Registration Confirmation and Receipt (off-line)	Edit
Events - Registration Confirmation and Receipt (on-line)	Edit
Events - Registration Confirmation Invite	Edit
Memberships - Receipt (on-line)	Edit
Memberships - Signup and Renewal Receipts (off-line)	Edit
Personal Campaign Pages - Admin Notification	Edit
Personal Campaign Pages - Supporter Status Change Notification	Edit
Personal Campaign Pages - Supporter Welcome	Edit
Petition - need verification	Edit
Petition - signature added	Edit
Pledges - Acknowledgement	Edit
Pledges - Payment Reminder	Edit
Profiles - Admin Notification	Edit
Tell-a-Friend Email	Edit
Test-drive - Receipt Header	Edit

## From Email Addresses

By default, CiviCRM uses the primary email address of the logged in user as the FROM address when sending emails to contacts. However, you can use this page to define one or more general Email Addresses that can be selected as an alternative. EXAMPLE: "*Client Services*" <clientservices@example.org>. This is a good place to put your chapter's general email address. The address with the green check in the default column will be the email addressed that is used. To change the primary email address, click on the black arrows under the Order column. Also, the order and all other options can be changed by clicking Edit.

## FROM EMAIL ADDRESS OPTIONS

**i** The From Email Address "test" has been saved.

By default, CiviCRM uses the primary email address of the logged in user as the FROM address when sending emails to contacts. However, you can use this page to define one or more general Email Addresses that can be selected as an alternative. EXAMPLE: "Client Services" <clientservices@example.org>

**+** Add From Email Address

Label	Value	Description	Order	Default	Reserved	Enabled?	
"FIXME" <info@FIXME.ORG>	1	Default domain email address and from name.	↓ ↑	✓	No	Yes	<a href="#">Edit</a> <a href="#">Disable</a> <a href="#">Delete</a>
"test" <test@test.com>	2		↑ ↓		No	Yes	<a href="#">Edit</a> <a href="#">Disable</a> <a href="#">Delete</a>

**+** Add From Email Address

Below is the window that appears after clicking **Add From Email Address** above. Include double-quotes (") around the name and angle-brackets (< >) around the email address. EXAMPLE: "Client Services" <clientservices@example.org>. The description box is for optional personal use and the weight box (required) identifies the importance of the new address. (Default =1, next important=2, etc.)

### New From Email Address Option











Save













Cancel

FROM Email Address

Include double-quotes (") around the name and angle-brackets (< >) around the email address.  
EXAMPLE: "Client Services" <clientservices@example.org>

Description

**B** **I** **U** *Font*          

Weight \*

Enabled? ☒

Default Option? ☐

Save

Cancel

## Reporting

### Search Chapter Contacts

This allows you to search all the contacts associated with your chapter. Use as many or as few filters as you'd like to narrow results.

**MAIN LINKS**

- > CiviCRM Help
- > Discussion Forums
- > Administration
- > My Profile

Create New

**NEW INDIVIDUAL**


First Name:

Last Name:

Email:

SAVE

**RECENT ITEMS**


Steve Montgomery

**SEARCH**

GO

All

**SEARCH CHAPTER CONTACTS**

Last Name

First Name

City

State

Email Address

Apply

Last Name

First Name

City

State

Email

				revakamhi@gmail.com
				scholar@mail.com
				civi@jail.net
	testy			testy@email.com
	dsfhjk			sdfghj@mail.com
				chris@promethost.com
				romeo@promethost.com
				utest@test.com
Anacker	Test Allison	Portland	OR	amjs22@gmail.com
asdasd	dasd			test@arcsfoundation-test.tv
Bartlett	Christopher	Brooklyn	NY	i_think_i_took_the_last_name@hotmail.com
bartlett	chris	dfgsdfgdfsg	MN	chris@promethost.com
bartlett	chris			chris@promethost.com
believit	icant			
Bill	Belligerent			
Bill	Belligerent			
Bill	Belligerent			

123456nextlast



## Chapter Roster

The chapter roster lists the members of your chapter by first and last name, city, state, and email. The list can be sorted by alphabetical (or reverse alphabetical order) in any of the columns below. You can export the chapter roster to an excel or document format by pushing the orange **XLS** and **DOC** buttons at the bottom of the list.

CHAPTER ROSTER				
Last Name ▲	First Name	City	State	Email
Bartlett	Christopher	Brooklyn	NY	i_think_i_took_the_last_name@hotmail.com
Mongomery	steve	San Antonio	TX	bsnyder@westmonroepartners.com
<a href="#">XLS</a> <a href="#">DOC</a>				

## ARCS Scholar Reporting

This page was created to run various ARCS reports in a simple and streamlined process. Select the report you'd like to run from the red box below. Reports can be filtered by easy-to-use filters such as **Chapter** and **School**. You can export the chapter roster to an excel or document format by pushing the orange **XLS** and **DOC** buttons at the bottom of the list.

ARCS Scholar Reporting » Alumni Tracking

CONNECT [t](#) [f](#) [b](#) [e](#)

**SCHOLAR REPORTS**

- > Alumni Tracking
- > ARCS Involvement
- > Area of Study
- > Awards
- > Awards by Program
- > Awards by Year
- > Contact Information
- > Employer Information
- > Field of Study
- > Mailing Labels
- > Mailing List
- > Scholars by Zipcode

**ALUMNI TRACKING**

This report lists the name, first year as an ARCS scholar and email address by school.

Chapter  School  [Apply](#)

Last Name	First Name	First Year Awarded	College	Email Address
		No awards for this scholar	n/a	
		No awards for this scholar	n/a	
		No awards for this scholar	n/a	
		No awards for this scholar	n/a	
		No awards for this scholar	n/a	utest@test.com
		No awards for this scholar	n/a	
		No awards for this scholar	n/a	
	testy	No awards for this scholar		testy@email.com
	dsfhjk	No awards for this scholar		sdfghj@mail.com
		No awards for this scholar	n/a	chris@promethost.com

## All ARCS Roster

---

The all ARCS Roster is the same as the Chapter Roster (see above) but includes all ARCS members.

## Create a New Report

---

There are between 30 and 40 different types of reports that can be generated and numerous filters and specifications that can be edited within each report template. A brief description is provided so the user can select the report that will generate the sought-after data. If reports have been previously created using a template there will be an **Existing Report(s)** link next to the template link and it will show a list of past reports. Each report is slightly different, some have many filters, some have very few. For instructions on how to create reports with these templates and apply filters to your reports, reference the Donation Summary section of this document (two sections above this).

You can save reports created from templates that you will use often. You can also add custom reports to your CiviCRM Dashboard as a dashlet.

## CREATE REPORTS FROM TEMPLATES

Create reports for your users from any of the report templates listed below. Click on a template titles to get started. Click Existing Report(s) to see any reports that have already been created from that template.

### ▼ CONTACT REPORT TEMPLATES

» <a href="#">Constituent Report (Summary)</a> <a href="#">Existing Report(s)</a>	Provides a list of address and telephone information for constituent records in your system.
» <a href="#">Constituent Report (Detail)</a> <a href="#">Existing Report(s)</a>	Provides contact-related information on contributions, memberships, events and activities.
» <a href="#">Activity Report</a> <a href="#">Existing Report(s)</a>	Provides a list of constituent activity including activity statistics for one/all contacts during a given date range(required)
» <a href="#">Relationship Report</a> <a href="#">Existing Report(s)</a>	Relationship Report
» <a href="#">Database Log Report</a>	Log of contact and activity records created or updated in a given date range.
» <a href="#">Activity Report (Summary)</a>	Shows activity statistics by type / date

### ▼ CONTRIBUTION REPORT TEMPLATES

» <a href="#">Donor Report (Summary)</a> <a href="#">Existing Report(s)</a>	Shows contribution statistics by month / week / year .. country / state .. type.
» <a href="#">Donor Report (Detail)</a> <a href="#">Existing Report(s)</a>	Lists detailed contribution(s) for one / all contacts. Contribution summary report points to this report for specific details.
» <a href="#">Donation Summary Report (Repeat)</a> <a href="#">Existing Report(s)</a>	Given two date ranges, shows contacts (and their contributions) who contributed in both the date ranges with percentage increase / decrease.
» <a href="#">Donation Summary Report (Organization)</a> <a href="#">Existing Report(s)</a>	Displays a detailed contribution report for Organization relationships with contributors, as to if contribution done was from an employee of some organization or from that Organization itself.
» <a href="#">Donation Summary Report (Household)</a> <a href="#">Existing Report(s)</a>	Provides a detailed report for Contributions made by contributors(Or Household itself) who are having a relationship with household (For ex a Contributor is Head of Household for some household or is a member of.)
» <a href="#">Top Donors Report</a> <a href="#">Existing Report(s)</a>	Provides a list of the top donors during a time period you define. You can include as many donors as you want (for example, top 100 of your donors).
» <a href="#">SYBUNT Report</a> <a href="#">Existing Report(s)</a>	Some year(s) but not this year. Provides a list of constituents who donated at some time in the history of your organization but did not donate during the time period you specify.
» <a href="#">LYBUNT Report</a> <a href="#">Existing Report(s)</a>	Last year but not this year. Provides a list of constituents who donated last year but did not donate during the time period you specify as the current year.
» <a href="#">Soft Credit Report</a>	Soft Credit details.

## Run an Existing Report

Reports that have been created from the templates will populate in this section. Running an existing report will allow the user to use specifications from a report that already has filters set. Clicking on one of the report links will immediately generate a report. After the report is generated, the user has the option to retroactively change some of the filters or report settings. The reports can be accessed on the page below

## CIVICRM REPORTS

▼ CONTACT REPORTS		
» <a href="#">Constituent Report (Summary)</a>	Provides a list of address and telephone information for constituent records in your system.	<a href="#">Delete</a>
» <a href="#">chris test report</a>	Provides a list of address and telephone information for constituent records in your system.	<a href="#">Delete</a>
» <a href="#">Constituent Report (Detail)</a>	Provides contact-related information on contributions, memberships, events and activities.	<a href="#">Delete</a>
» <a href="#">Activity Report</a>	Provides a list of constituent activity including activity statistics for one/all contacts during a given date range(required)	<a href="#">Delete</a>
» <a href="#">Relationship Report</a>	Gives relationship details between two contacts	<a href="#">Delete</a>
▼ CONTRIBUTION REPORTS		
» <a href="#">Donor Report (Summary)</a>	Shows contribution statistics by month / week / year .. country / state .. type.	<a href="#">Delete</a>
» <a href="#">Donor Report (Detail)</a>	Lists detailed contribution(s) for one / all contacts. Contribution summary report points to this report for specific details.	<a href="#">Delete</a>
» <a href="#">Donation Summary Report (Repeat)</a>	Given two date ranges, shows contacts (and their contributions) who contributed in both the date ranges with percentage increase / decrease.	<a href="#">Delete</a>
» <a href="#">Donation Summary Report (Organization)</a>	Displays a detailed contribution report for Organization relationships with contributors, as to if contribution done was from an employee of some organization or from that Organization itself.	<a href="#">Delete</a>
» <a href="#">Donation Summary Report (Household)</a>	Provides a detailed report for Contributions made by contributors(Or Household itself) who are having a relationship with household (For ex a Contributor is Head of Household for some household or is a member of.)	<a href="#">Delete</a>
» <a href="#">Top Donors Report</a>	Provides a list of the top donors during a time period you define. You can include as many donors as you want (for example, top 100 of your donors).	<a href="#">Delete</a>
» <a href="#">SYBUNT Report</a>	Some year(s) but not this year. Provides a list of constituents who donated at some time in the history of your organization but did not donate during the time period you specify.	<a href="#">Delete</a>
» <a href="#">LYBUNT Report</a>	Last year but not this year. Provides a list of constituents who donated last year but did not donate during the time period you specify as the current year.	<a href="#">Delete</a>
» <a href="#">Soft Credit Report</a>	Soft Credit details.	<a href="#">Delete</a>
» <a href="#">Bookkeeping Transactions Report</a>	Shows Bookkeeping Transactions Report	<a href="#">Delete</a>
▼ MEMBER REPORTS		

## Examples of How to Use and Read Reports

### DONATION SUMMARY

To generate the Donation Summary Report, first set the report criteria and filters so you the report will contain the information you're looking to pull from the CiviCRM database. Using the filters allows the you to indicate contributions from a specific time period or contributions between certain amounts. No

filters are required to generate a report. You can choose the columns that you want to appear as well as how you want the information grouped.

Once you preview the report, you can go back and update the criteria as many times you need until the report is satisfactory.

### DONATION SUMMARY REPORT (REPEAT)

REPORT CRITERIA

Display Columns

☒ Contact Name
 ☐ Email
 ☐ Phone
 ☐ Country
 ☐ State/Province
 ☐ Contribution Type
 ☐ Contribution Source
 ☒ Range One Stat
 ☒ Range Two Stat

Group by Columns

☒ Contact
 ☐ Country
 ☐ State/Province
 ☐ Contribution Type
 ☐ Contribution Source

Set Filters

Date Range One	Previous Year	
Date Range Two	This Year	
Range One Amount	Is less than or equal to	
Range Two Amount	Is less than or equal to	
	Is one of	Completed Pending Cancelled Failed
Group	Is one of	Administrators test group 2 test group test group for
Tag	Is one of	College Corporation Donor Foundation

Preview Report

REPORT SETTINGS

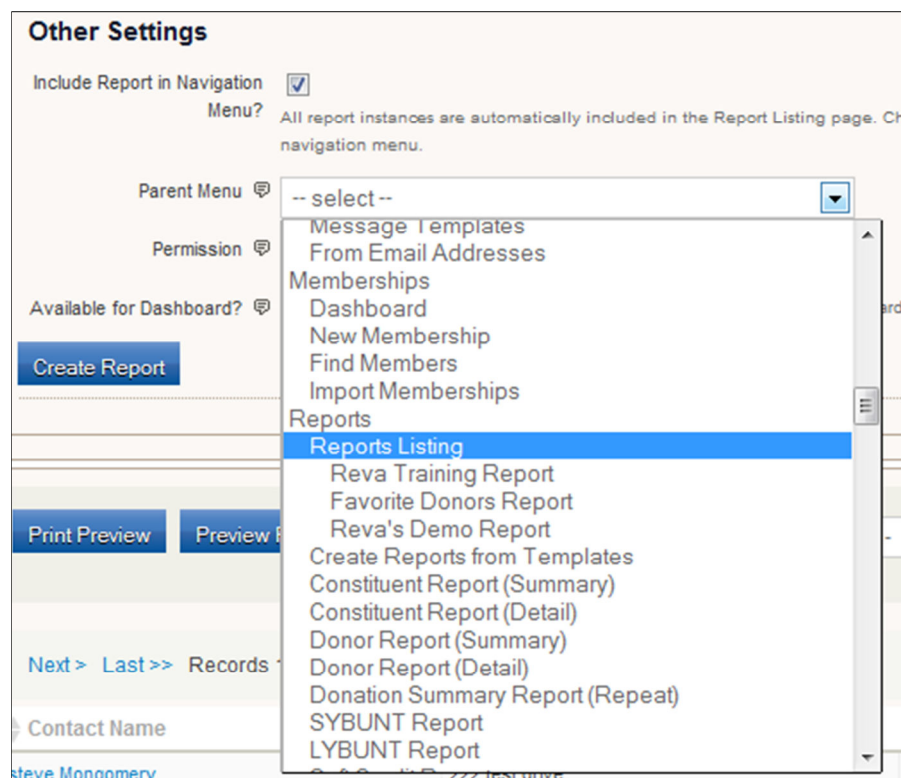
Update Report

Report functionality can be expanded in the Report Settings window. The **Report Title** and the **Report Description** below will be displayed to users in the reports list when they click the 'CiviReport' menu. The title should reflect the report's default criteria. EXAMPLE: Donation Summary - Current Year-to-date.

The **Report Header** contains HTML code that will be output at the beginning of the document whenever this report is printed or downloaded in PDF format. The report header is automatically generated and it is recommended that you do not alter this or the **Report Footer** field. You do not need to make any changes to the Report Header or Footer.

A copy of this report can be automatically generated and delivered via email to specified recipients. Use the settings in the Email Deliver Settings to control **Subject** of the email containing the report, as well as the recipient list (**To** and **Cc** fields). Multiple email addresses should be separated by commas.

If you choose to **Include Report in Navigation Menu**, select the **Parent Menu** item corresponding to the section this item should be placed in. You should always add your report to the following item: Reports >> Reports Listing.



Please leave the **Permission** as is, these have been preconfigured. You can also prevent users from modifying the default report criteria and filters for reports by NOT giving them *access Report Criteria* permission. Those users will be able to run the report - but only with the criteria and filters that you've established for them.



REPORT CRITERIA

REPORT SETTINGS

### General Settings

Report Title

Report Description

Report Header

```

<html>
  <head>
    <title>CiviCRM Report</title>
    <style type="text/css">@import url(http://arcs-
multi.prometdev.com/sites/all/modules/civicrm/css/print.css);</style>
      
```

Report Footer

```

<p></p></div></body>
</html>
      
```

### Email Delivery Settings

Subject

To

CC

### Other Settings

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

Parent Menu

Permission

Available for Dashboard?
☐
Users with appropriate permissions can add this report to their dashboard.

Update Report

The final section of the Donation Summary Report page is the preview. The user can **Print Report**, generate a **PDF**, or **Export to CSV**. Contacts are listed and links are available (see Benjamin Snyder below)

[Update Report](#)

[Print Report](#)
[PDF](#)
[Export to CSV](#)

- select group -

[Add these Contacts to Group](#)

Grouping(s) Contact

Date Range One Between January 1st, 2010 and December 31st, 2010

Date Range Two Between January 1st, 2011 and December 31st, 2011

Is Completed

Contact Name	January 1st, 2010 - December 31st, 2010	January 1st, 2011 - December 31st, 2011	% Change
Benjamin Snyder		\$ 10.00 (4)	New Donor

Row(s) Listed 1

## TOP DONOR REPORT

The Top Donor Report is created the same way as the Donation Summary Report. The only difference is that there are no display columns to select in this report since it is strictly reporting the top donors. If you have questions, see the instructions directly above under Donation Summary.

### TOP DONORS REPORT

▶ REPORT CRITERIA

▶ REPORT SETTINGS

[Print Report](#)
[PDF](#)
[Export to CSV](#)

- select group -

[Add these Contacts to Group](#)

Receive Date Between January 1st, 2011 and December 31st, 2011

Donation Status Is Completed

Rank	Contact Name	Aggregate Amount	Donations	Average
1	TestingLady Test	\$ 10,000.00	1	\$ 10,000.00
2	Mrs. Trial Trial	\$ 418.00	2	\$ 209.00
3	Benjamin Snyder	\$ 4.00	2	\$ 2.00

Row(s) Listed 3



## Web Analytics

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Web analytics directs you to Google where you can view web traffic and site details.

WEB ANALYTICS	View	Edit
<p>Please use the following information to log into our Google Analytics account to see data on web traffic. <a href="#">Click here</a> to access the Google Analytics site.</p> <p>Email: <a href="mailto:arcsmulti@gmail.com">arcsmulti@gmail.com</a> Password: @rcsMulti Best Childhood Friend Name: John Tracking Code: UA-24546149-1</p>		

## Online Forms

These are online versions of frequently used ARCS forms. They can be filled out online and will be automatically sent to the correct recipient over email. Anything marked with a red asterisk is required. Clicking on the “add more” link will allow you to enter more lines in that category.

### Chapter Profile Form

CHAPTER PROFILE FORM		View	Edit	Webform	Results	Export	Devel
<b>Chapter Information</b>							
Chapter Name: *	<input type="text"/>						
Chapter President: *	<input type="text"/>						
<b>Scholar Award Information</b>							
Total dollars distributed to University, Schools, and/or institutions in the current fiscal year: *	<input type="text"/>						
Award Range: *	<input type="text"/>						
Total Scholars Supported: *	<input type="text"/>						
<b>Total Undergraduate Recipient(s)</b>							
Total Number of Recipients:	<input type="text"/>						
Total Value of Awards:	<input type="text"/>						
<b>Total Graduate Recipients</b>							
Total Number of Recipients:	<input type="text"/>						
Total Value of Awards:	<input type="text"/>						
Total Number of Recipient Institutions: *	<input type="text"/>						
<b>Recipient Institution Awards</b>							
Recipient Institution:	<input type="text"/>						
Dollar Amount Awarded:	<input type="text"/>						
Number of Awards:	<input type="text"/>						
<b>Membership Information</b>							
Total Members: *	<input type="text"/>						
Active							

## Expense Reimbursement Form

EXPENSE REIMBURSEMENT FORM		View	Edit	Webform	Results	Export	Devel
<b>Instructions</b>	<ul style="list-style-type: none"> <li>This form must be completed for reimbursement of expenses incurred on behalf of ARCS. Original receipts and/or invoices must be sent by U.S. mail to the ARCS Treasurer.</li> <li>All requests for reimbursement of expenses must be received by the Treasurer prior to June 15 of the fiscal year in which the expense is incurred.</li> <li>The chair of an event must approve all expenses incurred by her committee members. This can be done by signing this form where indicated below or with a note sent separately by email or fax.</li> </ul>						
<b>Reimbursement Information</b>	<ul style="list-style-type: none"> <li>All requests for expense repayment to a member should be documented in the expense form below explaining the expense</li> <li>All receipts should be provided to your Treasurer in person or via postal mail.</li> <li>Do not hold bills; please report expenses <b>at least monthly</b>.</li> <li>For major events (Scholar Luncheon, Gala), the Event Chair (or President) must approve the expenditure.</li> <li>If a bill is to be paid at an event, the Treasurer must be notified in advance.</li> <li>Please note that a chapter president's request for air fare for a Board Meeting should be received within thirty days after the Meeting</li> </ul>						
Office: *	<input type="text"/>						
Name: *	<input type="text"/>						
Address for Reimbursement: *	<input type="text"/>						
Phone Number: *	<input type="text"/>						
Email: *	<input type="text"/>						
<b>Expenses for Reimbursement</b>							
Item description: *	<input type="text"/>						
Vendor name: *	<input type="text"/>						
	<input type="text"/>						

## Order ARCS Items

ORDER ARCS ITEMS FORM		View	Edit	Webform	Results	Export	Devel
<b>Contact Information</b>							
Name: *	<input type="text"/>						
Chapter: *	<input type="text"/>						
Street Address: *	<input type="text"/>						
City: *	<input type="text"/>						
State: *	<input type="text" value="- Select -"/> <input type="button" value="v"/>						
Zip Code: *	<input type="text"/>						
Phone Number: *	<input type="text"/>						
<b>Scholar Certificates</b>							
Date Certificates need to be received by chapter:	<input type="text" value="2011"/> <input type="button" value="v"/>	<input type="text" value="Jul"/> <input type="button" value="v"/>	<input type="text" value="19"/> <input type="button" value="v"/>	<input type="button" value="calendar"/>			
Number of Certificates:	<input type="text"/>						
<b>Medallions</b>							
Date Medallions need to be received by chapter:	<input type="text" value="2011"/> <input type="button" value="v"/>	<input type="text" value="Jul"/> <input type="button" value="v"/>	<input type="text" value="19"/> <input type="button" value="v"/>	<input type="button" value="calendar"/>			
Number of Medallions:	<input type="text"/>						
<b>ARCS Scarves</b>							
Date scarves need to be received by chapter:	<input type="text" value="2011"/> <input type="button" value="v"/>	<input type="text" value="Jul"/> <input type="button" value="v"/>	<input type="text" value="19"/> <input type="button" value="v"/>	<input type="button" value="calendar"/>			
Number of Scarves:	<input type="text"/>						
<b>Lapel Pins</b>							
Date lapel pins need to be received by chapter:	<input type="text" value="2011"/> <input type="button" value="v"/>	<input type="text" value="Jul"/> <input type="button" value="v"/>	<input type="text" value="19"/> <input type="button" value="v"/>	<input type="button" value="calendar"/>			