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Titolo	CiviCRM cookbook [[electronic resource]] : master this web-based constituent relationship management software for nonprofit and civic sector organizations // Tony Horrocks
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Descrizione fisica	1 online resource (236 p.)
Soggetti	Customer relations - Management - Data processing Open source software Electronic books.
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Note generali	Description based upon print version of record.
Nota di bibliografia	Includes bibliographical references and index.
Nota di contenuto	Cover; Copyright; Credits; Foreword; About the Author; About the Reviewers; www.PacktPub.com; Table of Contents; Preface; Chapter 1: Setting Up CiviCRM; Introduction; Setting up a CiviCRM theme in Drupal; Setting up cron using cPanel; Adding items to the CiviCRM navigation menu; Refreshing the dashboard; Changing display preferences; Replacing words; Setting up geocoding; Autofiling e-mails; Creating new activities; Adding custom fields; Using Scheduled Reminders for activities; Using CiviCase to create an HR system; Installing languages and localizing CiviCRM Chapter 2: Organizing Data EfficientlyIntroduction; Adding contact types; Adding a time-limited relationship; Using tag sets to quickly organize data; Using tags and groups to segment data; Changing option lists; Creating and updating a smart group; Using Google Refine to prepare data; Importing into CiviCRM using an import script; Using external identifier deduping rules to update contacts; Using Google Refine to create a unique ID; Importing relationship data; Exporting related data; Batch updating using profiles; Chapter 3: Using the Power of Profiles; Introduction; Speeding up data entry Using URLs to change profile displaysCreating a membership directory; Controlling the search result columns using profiles; Using the Profile Pages and Listings setting to improve usability; Setting up reCAPTCHA

for user profiles; Chapter 4: Controlling Permissions; Introduction; Integrating profiles into Drupal user accounts; Restricting access to custom fields; Using CRM profile permissions correctly; Creating permissions for administrators; Managing event registrations using CiviCRM Access Control Lists; Chapter 5: Managing Communications; Introduction

Setting up a bounced e-mail account using Gmail; Creating mail templates for CiviMail; Creating mail templates for CiviMail in Drupal; Using tokens in templates; Creating custom date tokens; Scheduling CiviMail; Throttling mailings to comply with hosting restrictions; Creating newsletter subscription services using profiles; Creating newsletter subscriptions using URLs; Creating a standalone newsletter subscription form; Getting a CiviMail report; Mailing attachments in e-mail and CiviMail; Allowing users to update information without logging in; Chapter 6: Searching and Reporting; Introduction

Creating a membership mailing list using Advanced Search; Using Search Builder to create a smart group; Adding the external identifier to full-text searching; Adding custom fields to a report; Adding an extra display field to a report template; Creating a dynamic relationship report using Drupal Views; Chapter 7: Integrating CiviCRM with Drupal; Introduction; Enabling Drupal Views; Creating user accounts from contacts in CiviCRM; Mapping contact data; Using Webform CiviCRM to update relationship data; Creating user accounts on the fly with CiviCRM entities

Combining CiviCRM contacts with Drupal content using CiviCRM entities

Sommario/riassunto

This book is written in cookbook style with practical, comprehensive recipes explained with the aid of the necessary screenshots. If you have basic CiviCRM skills and want to further enhance your CiviCRM skills, this book is for you.
