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	Nota di contenuto	Cover; Copyright; Credits; Foreword; About the Authors; About the Reviewers; www.PacktPub.com; Table of Contents; Preface; Chapter 1: Achieving Your Mission with CiviCRM; Why your organization needs Constituent Relationship Management; What is Constituent Relationship Management?; Customer Relationship Management versus Constituent Relationship Management; Who are your constituents?; When is CiviCRM the best CRM?; Thinking through alternatives; Other CRMs; Why CiviCRM?; Focused on needs of non-profits; User satisfaction; No vendor lock-in; Integration with Drupal and Joomla!; Total cost Dynamic open source developmentDocumentation; Responsive community support; How CiviCRM will help your organization; Summary; Chapter 2:Planning Your CRM Implementation; Barriers to success; Perfection is the enemy of the good; Development methodologies; The conventional Waterfall Development methodology; Iterative development methodology; Agile development methodology; Food Pantry Association of Greater Metropolis; Right-sizing the process; Building the team; Getting started; Creating a baseline; Developing the vision; Creating a project plan; Total cost of ownership Focusing on constituents and missionRethinking organizational processes; Determining your needs; Functional requirements; Contact

record management; Contact subtypes; Custom data; e-Newsletters and bulk e-mails; Fundraising; Memberships and subscriptions; Events; Grant management; Activities; Case management; Roles and permissions; CMS integration; Third-party integration; Server sourcing; Implementation plan; Summary; Chapter 3:Installation, Configuration, and Maintenance; Installing CiviCRM; Installation in Joomla!; Installation in Drupal; Browser/FTP procedure; Drush procedure

Installation troubleshootingConfiguring CiviCRM; Site Configuration; Viewing and Editing Contacts; Sending e-mails; Handling return e-mail traffic; Maintaining a good e-mail server reputation; Configuring the e-mail processor; Online payment processors; Integrated versus redirection processors; Configuring the payment processor; System workflow templates; Organization, customization, and components; Organize your contacts; Customize Data, Forms and Screens; Components; Option Lists; Synchronization with CMS users; Drupal access control for CiviCRM; CiviGroup Roles Sync; CiviMember Roles Sync

CiviCRM OG SyncCiviCRM access control under Drupal; Dashboard; Navigation; Setting up cron jobs; Upgrades and maintenance; Version and revision upgrades; Joomla! upgrades; Drupal upgrades; Moving an installation to a new server; System maintenance; Developing a backup policy and procedure; Summary; Chapter 4:CiviCRM Basics: Moving through the System and Working with Contacts; Introduction to the interface; Contacts; Individuals, organizations, and households; Contact subtypes; Planning your contact types; Core information fields; Contact details; Custom data; Address

Communication preferences

Sommario/riassunto	Develop and implement a fully functional, systematic CRM plan for your organization Using CiviCRM