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Altri autori (Persone)	ShaughnessyBrian P
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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 mission Rethinking 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 troubleshooting Configuring 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 Sync CiviCRM 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
