



Quick answers to common problems

CiviCRM Cookbook

Master this web-based constituent relationship management software for nonprofit and civic sector organizations

Foreword by Dave Greenberg, Co-founder of CiviCRM

Tony Horrocks

[PACKT] open source*
PUBLISHING community experience distilled

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BIRMINGHAM - MUMBAI

CiviCRM Cookbook

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Foreword

This year CiviCRM celebrated its eight birthday. Leveraging the open source model of collaboration and transparency, a global network of passionate people have built an enterprise quality CRM solution, which provides a compelling alternative to closed source proprietary products, and supports the mission critical activities of thousands of nonprofit and civic-minded organizations in more than 25 countries and five continents. Nonprofits of all sizes are adopting CiviCRM, from local arts groups (such as San Francisco Center for the Book), to multinational membership associations (International Mountain Biking Association), political parties (British Columbia NDP), advocacy organizations (Electronic Frontier Foundation), national charities (Leukemia & Lymphoma Research), and government entities (New York State Senate).

This "Cookbook" represents another exciting milestone in the evolution of the project. As an enthusiastic chef, I learned long ago that cookbook recipes provide a launching point for creativity. Good cooks take a recipe, test it out, and then modify and improve it based on their personal taste *and* knowing their "audience" (family, friends, and guests). Cookbook recipes are a perfect analog for sharing, leading to innovation.

CiviCRM's strength is based on shared innovation. In the two years since Packt's *Using CiviCRM* was published, we've seen an explosion of invention as users and implementers shape CiviCRM-based solutions to increasingly complex problems. Some of these are one-off customizations, but many have developed into full-fledged projects such as the CiviCRM-Webform integration module highlighted in this book. The power of these tools was brought home to me at a recent CiviCRM meetup, where Lisa Hubbert demonstrated the complex summer camp management interface she had built as a volunteer for San Francisco Arts Ed – a wonderful nonprofit that runs arts programs for inner-city kids. Lisa is not a software engineer, but a curious and passionate "cook". She developed an effective solution for her organization, *and* she taught and inspired others by sharing her work at a meetup and on the `CiviCRM.org` blog.

The introduction this year of "native" CiviCRM extensions, a built-in extension browser for site administrators, and a searchable Extensions Directory (<http://civicrm.org/extensions>) on `CiviCRM.org`, will facilitate even more shared innovation—including sharing major new extension-based functionality such as the forthcoming CiviVolunteer module across all three CMS platforms.

For those of you working with CiviCRM in a Drupal environment, this book includes a wide array of techniques. Take advantage of the integration capabilities and openness of both platforms. For those of you working with CiviCRM in WordPress or Joomla!, my hope is that these recipes will stimulate you to explore, build, and share analogous integrations with those CMSs.

This Cookbook is well-suited to bridge the gap between nontechnical end users and software engineers. Whether you are a volunteer, in-house staff person, or a consultant—I'm confident it will provide you with ideas for using CiviCRM more effectively.

Ultimately, the strength of any open source project is the strength of the community behind it. If CiviCRM helps your organization (or your clients' organizations) with mission critical tasks, I urge you to participate actively in the community. Sponsor new features and improvements via the "make it happen" campaigns (<http://civicrm.org/mih>), post new recipes and modules on the Extensions Directory (<http://civicrm.org/extensions>), use social media to share success stories, introduce your peers at other nonprofits to CiviCRM, join a local meetup (or start one), help others who are getting started, and ensure the long-term sustainability of the project with a recurring contribution at <http://civicrm.org/contribute!>

*David Greenberg,
Co-founder of CiviCRM*

Looking for more learning resources? Check out:

- ▶ *Using CiviCRM* by Packt Publishing
- ▶ CiviCRM User guild and Developer guide (<http://book.civicrm.org>)
- ▶ Extension Developer guide and reference (<http://documentation.civicrm.org>)

And remember, CiviCRM is continually evolving and growing, so make sure you're on top of the latest news, by subscribing to the community newsletter at <http://civicrm.org>.

About the Author

Tony Horrocks is the owner of Fabriko Limited (<http://fabriko.co.uk>), a web development company that specializes in CiviCRM and Drupal. Tony has worked for membership organizations for over 25 years and has been developing websites since 1994.

He now works primarily as a Development Consultant for the nonprofit sector.

Thanks, of course, to the superstars of Packt Publishing for their assistance and encouragement, and the reviewers far and wide who I have never met.

Also, thanks to the CiviCRM core development team and the wider CiviCRM community for their dedication.

Thank you to all those people and organizations who donate to the CiviCRM project (<http://civicrm.org/content/make-it-happen>).

Lastly, thanks to Jackie, without whom none of this would have been possible, and also thanks to Rosie, who now has a book dedicated to her.

About the Reviewers

Erik Hommel has been an active member of the CiviCRM community since 2009. As project manager and developer with EE-atWork (<http://www.ee-atwork.nl>), he has worked on several projects implementing CiviCRM and developing customizations to CiviCRM. You can spot Erik regularly in the CiviCRM community on IRC or on the forum.

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Keenly interested in electronics and technology from an early age, Andrew built his first computer from scratch while in high school in the early 80s. His journey in computer programming began with machine language assemblers, graduating to variations of Basic, C, and he eventually made the leap to web technologies in the mid-1990s when the Internet burst on to the scene.

Andrew has been developing and producing websites since 1998, and today he specializes in developing online membership management systems using Drupal and CiviCRM. Andrew was the technical reviewer for *Designing Next Generation Web Projects with CSS3* (2013), Packt Publishing.

When he is not sharing the responsibilities of running their business with his wife Fiona, Andrew can be found riding or restoring his vintage ex-racing motorcycles.

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Preface

A good implementation of CiviCRM can transform your organization. Online management of contacts, members, communications, campaigns, funding, and casework used to be beyond the means of small non-governmental organizations (NGOs). But not anymore.

CiviCRM is loaded with features designed and developed by NGOs that make it a second-to-none management tool.

This book takes you from a CiviCRM installation and guides you through, by example, how to exploit the features that make it so popular.

We cover the post-installation setup and all the core and component parts of CiviCRM. In some cases, the recipes focus on CiviCRM, while in others, we cover using CiviCRM with Drupal.

The recipes in this book are not just meant to provide solutions to specific problems. They are there for you to explore and adapt to your own situation.

You don't need to be—and are not expected to be—a CiviCRM expert or a coding ninja. Far from it. What you do need, however, is the will and enthusiasm to use CiviCRM to take your organization from where it is now to where you want it to be.

What this book covers

Chapter 1, Setting Up CiviCRM, covers the important post-installation tasks that will get you going quickly. We look at some of the hard-to-do and hard-to-find settings and explore some of the ways of implementing workflows using Scheduled Reminders and CiviCase.

Chapter 2, Organizing Data Efficiently, covers the role of tags and groups. We also explore importing and exporting data, and some techniques to make these processes trouble-free.

Chapter 3, Using the Power of Profiles, covers how you can exploit the power of CiviCRM profiles to improve usability, speed up data entry, and control listings and directories.

Chapter 4, Controlling Permissions, demystifies permissions and shows you how you can use them in a variety of contexts to control access to viewing and editing data.

Chapter 5, Managing Communications, covers how to get the best out of CiviMail. We explore the mail templating system and a Drupal-based alternative to authoring your mailings. We also cover techniques for managing mailing subscriptions and allowing users to update information easily.

Chapter 6, Searching and Reporting, focuses on the search capabilities of CiviCRM. We look at how you can use searching to find and group data easily. We also explore how you can customize the search result display, and finally we will look at a search technique in Drupal that is not possible within CiviCRM itself.

Chapter 7, Integrating CiviCRM with Drupal, covers integrating CiviCRM with Drupal Views and using the power of the Drupal Webform CiviCRM module to do things CiviCRM can't. Finally, we explore some experimental modules that enable you to create user accounts on the fly and to organize contacts using Drupal taxonomy terms.

Chapter 8, Managing Events Effectively, uses CiviEvents to explore how you can use jQuery to alter the display and behavior of CiviCRM forms. We also look at how you can use Webform CiviCRM to control registration workflow for paid-for events.

Chapter 9, Using Campaigns, Surveys, and Petitions Effectively, covers in detail how to set up campaigns, surveys, and petitions. We also look at how you can use Drupal Views to create a Campaign Dashboard so you can get at-a-glance information about the progress of your campaigns.

Chapter 10, Working with CiviMember, explores **CiviMember**, a CiviCRM component used for membership management. We look at a popular requirement—displaying a membership directory—and then explore how to link common membership tasks with other CiviCRM components.

Chapter 11, Developing with CiviCRM, looks at the software, skills, and resources you need to start developing CiviCRM in earnest. We also cover developing a simple Drupal module and exploring the CiviCRM API.

What you need for this book

You will need an installed version of CiviCRM. For several recipes, the CMS of choice should be Drupal. There are no specific recipes for Joomla! or WordPress.

For some of the recipes you should have a good text editor.

Who this book is for



This book is for the nontechnical CiviCRM user. You will know how to get CiviCRM installed, but will now want to find out the tips, tricks, and techniques to get the best out of CiviCRM for your particular situation. You should understand the basic operation of CiviCRM and Drupal. For some recipes, it helps if you are familiar with a coding environment as we will be doing some PHP scripting, but you do not need any programming or technical skills as you will learn everything you need in this book.



Conventions

In this book, you will find a number of styles of text that distinguish between different kinds of information. Here are some examples of these styles, and an explanation of their meaning.

Code words in text are shown as follows: "In the previous recipe, we used a URL to access the profile we created, that is, `civicrm/profile/create?gid=N&reset=1`, where N was the ID of our profile."

New terms and **important words** are shown in bold. Words that you see on the screen, in menus or dialog boxes for example, appear in the text like this: "Navigate to **Administer | Customize Data and Screens | Profiles** and add a new profile that will contain the fields you wish to display on your directory."

 Warnings or important notes appear in a box like this. 

 Tips and tricks appear like this. 

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1

Setting Up CiviCRM

In this chapter we will cover:

- ▶ 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

Introduction

This chapter provides recipes to help you set up your CiviCRM installation. You will find that most of them work in Drupal, Joomla!, and WordPress. Some recipes are **Content Management System (CMS)** specific and we have chosen Drupal to illustrate these.

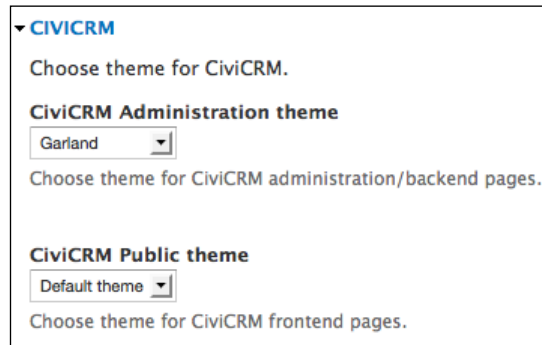
Setting up a CiviCRM theme in Drupal

CiviCRM administration screens take up a lot of browser real estate. How CiviCRM looks is determined by what themes you are using in your CMS. Problems arise when you use your main website theme to display CiviCRM pages. All the customizations, blocks of information, and layouts suddenly get in the way when you want to administer CiviCRM. The trick is to use a different theme for CiviCRM.

How to do it...

This is very easy to accomplish, and just uses a configuration screen in Drupal.

1. Make sure you have the CiviCRM theme module enabled.
2. Navigate to `admin/appearance` in Drupal by clicking on the **Appearance** button. This page shows the themes that are currently installed within our CMS—in this case, Drupal.
3. Make sure that any themes you wish to use are enabled.
4. At the foot of the screen, configure **CiviCRM Administration theme**.



The screenshot shows a configuration panel for CiviCRM themes. It is titled "CIVICRM" and contains two sections. The first section, "CiviCRM Administration theme", has a dropdown menu currently set to "Garland" and is accompanied by the text "Choose theme for CiviCRM administration/backend pages." The second section, "CiviCRM Public theme", has a dropdown menu currently set to "Default theme" and is accompanied by the text "Choose theme for CiviCRM frontend pages."

How it works...

Drupal uses the page URL to check if you are administering CiviCRM. If you are, the pages are displayed using the CiviCRM administration theme.

It's a good idea to select a flexible-width theme with sidebars. Garland is a good example. The flexible width accommodates CiviCRM displays nicely.

Once the administration theme is selected, navigate to `admin/structure/blocks`. Here you will see various blocks provided by the CiviCRM module. You can now place these blocks within your administrative theme.

Pay special attention to the visibility settings for these blocks, so that they only appear when using CiviCRM.

There's more...

In Drupal, there is an additional setting that controls which theme is used to display public CiviCRM pages, for example, event sign-up pages.

See also

- ▶ You can explore hundreds of contributed Drupal themes at <http://drupal.org/project/themes>

Setting up cron using cPanel

Cron is a time-based scheduler that is used extensively throughout CiviCRM. For example, you might want to use CiviCRM to send out an e-mail newsletter at a particular time, or you might want to send out a reminder to participants to attend an event. CiviCRM has settings to accomplish all these tasks, but these, in turn, rely on having "master" cron set up. Cron is set up on your web server, not within CiviCRM.

How to do it...

There are many different ways of setting up cron, depending on your site-hosting setup. In this example, we are using cPanel, a popular control panel that simplifies website administration.

1. Make a note of your CMS site administrator username and password.
2. Make a note of your CiviCRM site key, which is a long string of characters used to uniquely identify your CiviCRM installation. It is automatically generated when CiviCRM is installed, and is stored in the `civicrm_settings.php` file. Using a text editor, open up the CiviCRM settings file located at `/sites/default/civicrm_settings.php`. Around line 170, you will see the following entry:

```
define( 'CIVICRM_SITE_KEY',  
  '7409e83819379dc5646783f34f9753d9' );
```

Make a note of this key.

3. Log in to cPanel and use the cPanel File Manager to explore the folders and files that are stored there. You are going to create a file that contains all the necessary information for cron to work. You can choose to create the cron file anywhere you like. It makes sense to keep it in the home directory of your webserver—that is, the first directory you get to once you start exploring.

4. Create a file called `CiviCron.php`. The naming does not particularly matter, but it must be a PHP file.
5. Insert the following code:

```
<?php
// create a new cURL resource
$ch = curl_init();
// set URL and other appropriate options
curl_setopt($ch, CURLOPT_URL,
    "http://myDrupalsite.com/sites/all/modules/civicrm/bin/
    cron.php?name=admin&pass=adminpassword&key
    =01504c43af550a317f3c6495c2442ab7");
curl_setopt($ch, CURLOPT_HEADER, 0);
// grab URL and pass it to the browser
curl_exec($ch);
curl_close($ch);
?>
```

- Substitute `http://myDrupalsite.com` with your own domain
 - Substitute `admin` with your own CMS admin username
 - Substitute `adminpassword` with your own CMS admin password
 - Substitute the key value with the site key from `civicrm_settings.php`
6. Save this file and then navigate to `cron` in cPanel.

Common Settings:	Twice an hour (0,30 * * * *)		
Minute:	0,30	Every 30 minutes	✓
Hour:	*	Every hour (*)	✓
Day:	*	Every day (*)	✓
Month:	*	Every month (*)	✓
Weekday:	*	Every weekday (*)	✓
Command:	php /home/emis/public_html/CiviCron.php ✓		
<input type="button" value="Add New Cron Job"/>			

7. Select an appropriate cron interval from the **Common Settings** list. Choosing an appropriate cron interval may take some experimentation, depending on how your site is set up. In the **Command** field, enter the following address:
php /home/site_account_name/public_html/CiviCron.php
The portion after `php` is the absolute path to the `CiviCron.php` file you created in step 4.
8. Click on **Add New Cron Job**.

How it works...

All cron does is execute the URL that is constructed in the cron file.

The following piece of code does the work:

```
curl_setopt($ch, CURLOPT_URL,
  "http://myDrupalSite.com/sites/all/modules/civicrm/bin/
  cron.php?name=admin&pass=adminpassword&key=
  01504c43af550a317f3c6495c2442ab7");
```

The URL contains the information on permissions (the username, the password, and the site key) to execute the `cron.php` file provided by the CiviCRM module.

Getting cron to work is critical to getting CiviCRM working properly. If you get into difficulties with it, the best solution is to contact your hosting company and seek guidance.



To test that your cron job is actually working, carry out the following instructions. In the cPanel cron screen, set it to send you an e-mail each time the cron command is run. The e-mail will contain an error message if the cron fails. Failures are generally due to an incorrect setting of the path, or a permissions problem with the username, password, or site key.

Adding items to the CiviCRM navigation menu

As you begin to use CiviCRM, you will want to provide administrative shortcuts. You can do this by adding custom menu blocks within your CMS or editing the navigation menu in CiviCRM.

How to do it...

CiviCRM has a fully customizable navigation menu. You can edit this menu to get one-click access to the features you use most.

1. Navigate to a page that you want to use as the link destination for a menu item. For example, you could navigate to **Contacts | Manage Groups**, and then select a suitable group.
2. Copy the page URL in the browser location. In this example, it would be as follows:

```
civicrm/group/search?reset=1&force=1&context=smog&gid=2
```