

nfp services  
CIVICON 2012  
Presentation  
September 19, 2012

Richard Slade

Sales Manager

Paul Hunter

Account Manager

- Postcode lookup
- Quick search extended for contacts
- Bank Account Validation
- Wordpress/CiviCRM Permission
- Wordpress/CiviMember Role Sync

## POSTCODE LOOKUP

For Contacts and Events

- Adding/editing contacts
- Adding/editing events
- Using TABCAT – Free postcode software

## Limitations

- UK specific

- Enter POSTCODE and house number (optional)

▼ Address

Location Type   Primary location for this contact  Billing location for this contact

Share Address With 

**Postcode Lookup**

House Number :  Post Code :

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.*

- Results from TABCAT

▼ Address

Location Type   Primary location for this contact  Billing location for this contact

Share Address With 

**Postcode Lookup**

House Number :  Post Code :

The Red Rose, 129 Seven Sisters Road, Finsbury Park, London, N7 7QG  
Cuba Solidarity Campaign, 129 Seven Sisters Road, London, N7 7QG  
Red Rose Club, 129, Seven Sisters Road, London, N7 7QG  
Seven Sisters Road, Finsbury Park, London, N7 7QG

Street Address

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

Add'l Address 1

- Select address to populate CiviCRM address fields

**Postcode Lookup**

House Number :  Post Code :

The Red Rose, 129 Seven Sisters Road, Finsbury Park, London, N7 7QG  
Cuba Solidarity Campaign, 129 Seven Sisters Road, London, N7 7QG  
Red Rose Club, 129, Seven Sisters Road, London, N7 7QG  
**Seven Sisters Road, Finsbury Park, London, N7 7QG**

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  Post Code



## QUICK SEARCH EXTENDED

For Contacts

- Fine grained quick search to search for
  - Internal id
  - External id
  - First name & Last name
  - Email
  - Phone
  - POSTCODE
  - Job title
- Options for Exact or Similar (wildcard) search

# QUICK SEARCH EXTENDED

× Quick Search

### CivCRM QuickSearch Extended

Use this form to find a contact using any of the below fields. PLEASE NOTE: You need to type a minimum of 3 characters before the Quick Search activates. This can be changed at the [settings](#) page.

Fields marked \* are **exact match and requires 1 character to activate the search**, irrespective of the options set in the settings page.

Quick Search Option:  Exact Match

Internal Id *	External Id *
First Name	Last Name
Email	Phone
Postal Code	Job Title

# QUICK SEARCH EXTENDED

× Quick Search

### CiviCRM QuickSearch Extended

Use this form to find a contact using any of the below fields. PLEASE NOTE: You need to type a minimum of 3 characters before the Quick Search activates. This can be changed at the [settings](#) page.

Fields marked \* are **exact match and requires 1 character to activate the search**, irrespective of the options set in the settings page.

Quick Search Option:  Exact Match

Internal Id \*

First Name

Email

Postal Code

External Id \*

Last Name

Phone

Job Title

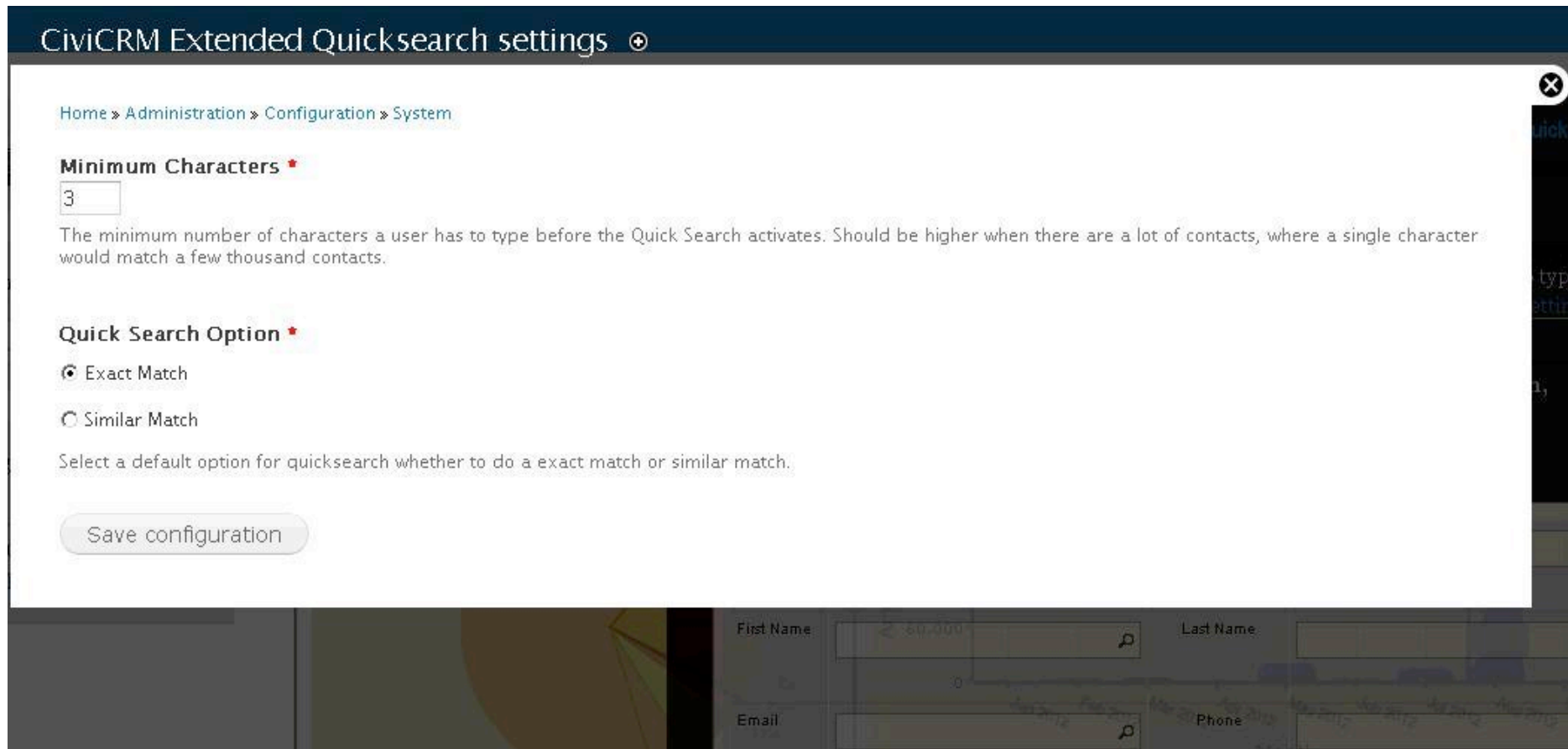
Miller Technology Limited :: 340 Gray's Inn Road :: London :: WC1X 8BG :: Greater London :: United Kingdom  
 Zeglam, Ehaam :: enaam@millertech.co.uk :: 020 7843 4408 :: 340 Gray's Inn

**Donor Report (Summary)**

**Top Donors Report**

Rank	Contact Name	Aggregate Amount	Donations	Average
1	Mr Andrew Morgate	£ 240,303.00	13	£ 18,484.85

- Settings page



CiviCRM Extended Quicksearch settings +

Home » Administration » Configuration » System

**Minimum Characters \***

The minimum number of characters a user has to type before the Quick Search activates. Should be higher when there are a lot of contacts, where a single character would match a few thousand contacts.

**Quick Search Option \***

Exact Match

Similar Match

Select a default option for quicksearch whether to do a exact match or similar match.

First Name  Last Name

Email  Phone

## BANK ACCOUNT VALIDATION

For Custom data (Direct Debit)

- Setting up a new direct debit mandate
- Using BACS-Active IP API

## Limitations

- UK specific


- Enter Account number and sort code

[CiviCRM » Contact Summary](#)

 Mr Norman Rose

▼ Direct Debit Mandate

Bank/Building Society	<input type="text"/>
Bank/Building Society number and street	<input type="text"/>
Town/City	<input type="text"/>
County	<input type="text"/>
Postcode	<input type="text"/>
Account Number	<input type="text" value="16782860"/>
Bank Sort Number	<input type="text" value="309293"/>
Account Holder Name	<input type="text"/>
BACS Ref Number	<input type="text"/>

 Validation in progress...




- Validation success

[CiviCRM](#) » [Contact Summary](#)

 Mr Norman Rose

▼ Direct Debit Mandate

Bank/Building Society	<input type="text"/>
Bank/Building Society number and street	<input type="text"/>
Town/City	<input type="text"/>
County	<input type="text"/>
Postcode	<input type="text"/>
Account Number	<input type="text" value="16782860"/>
Bank Sort Number	<input type="text" value="309293"/>
Account Holder Name	<input type="text"/>
BACS Ref Number	<input type="text"/>

 Validation success.


- Validation failed

[CiviCRM](#) » [Contact Summary](#)

 Mr Norman Rose

▼ Direct Debit Mandate

Bank/Building Society	<input type="text"/>
Bank/Building Society number and street	<input type="text"/>
Town/City	<input type="text"/>
County	<input type="text"/>
Postcode	<input type="text"/>
Account Number	<input type="text" value="11111111"/>
Bank Sort Number	<input type="text" value="111111"/>
Account Holder Name	<input type="text"/>
BACS Ref Number	<input type="text"/>

 Validation failed. Please check sort code/account number and try again.

## WORDPRESS/CiviCRM PERMISSION

### CiviCRM Back End

- Permissions for CiviCRM Backend roles/users
- Wordpress Administrator (role) can access Permissions setting page/form

## Limitations

- Under development/needs improvement
- Doesn't account for anonymous role (equivalent in Wordpress?)

- Permissions settings page/form

Home Search Contacts Contributions Events Mailings Memberships Reports Administer Help Logout

WordPress 3.4.2 is available! [Please update now.](#)

CiviCRM

## CiviCRM Permission Settings

Save

Use this form to set CiviCRM permissions for the Wordpress roles and click 'Save'. This process may take few minutes as the permissions need to be saved and the menu rebuilt.

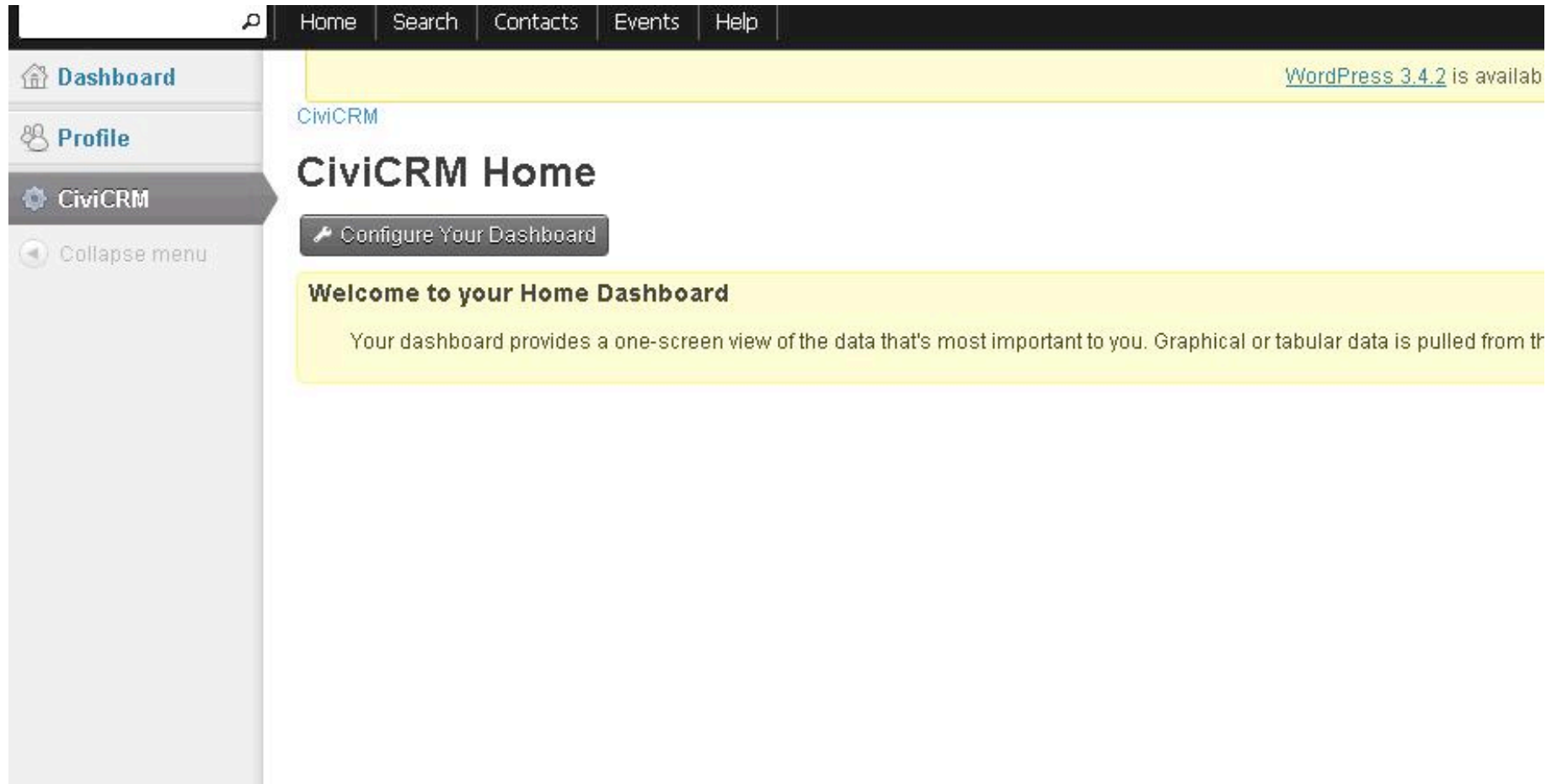
**IMPORTANT:** Please note the roles should be assigned 'access\_civicrm\_nav\_link' capability in Wordpress for them to access CiviCRM and the fine-grained permissions to access components of CiviCRM can be set here.

	ADMINISTRATOR	SUBSCRIBER	EVENT MANAGER
add contacts	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
view all contacts	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
edit all contacts	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
delete contacts	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
access deleted contacts	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
import contacts	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
edit groups	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

- Example: Set permissions for Event Manager

	ADMINISTRATOR	SUBSCRIBER	EVENT MANAGER
access AJAX API	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
access contact reference fields	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
access CiviEvent	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
edit event participants	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
edit all events	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
register for events	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
view event info	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
view event participants	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
delete in CiviEvent	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
access CiviContribute	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
edit contributions	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
make online contributions	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

- Event Manager: Logged In



The screenshot shows the CiviCRM Home dashboard. At the top, there is a navigation bar with links for Home, Search, Contacts, Events, and Help. Below this is a sidebar menu with options for Dashboard, Profile, CiviCRM, and a Collapse menu button. The main content area features a yellow notification bar at the top right stating "WordPress 3.4.2 is available". Below this, the text "CiviCRM" is displayed, followed by the heading "CiviCRM Home". A button labeled "Configure Your Dashboard" is visible. A large yellow box contains the text "Welcome to your Home Dashboard" and a paragraph: "Your dashboard provides a one-screen view of the data that's most important to you. Graphical or tabular data is pulled from th".

## WORDPRESS/CiviMEMBER ROLE SYNC

### CiviCRM Back End

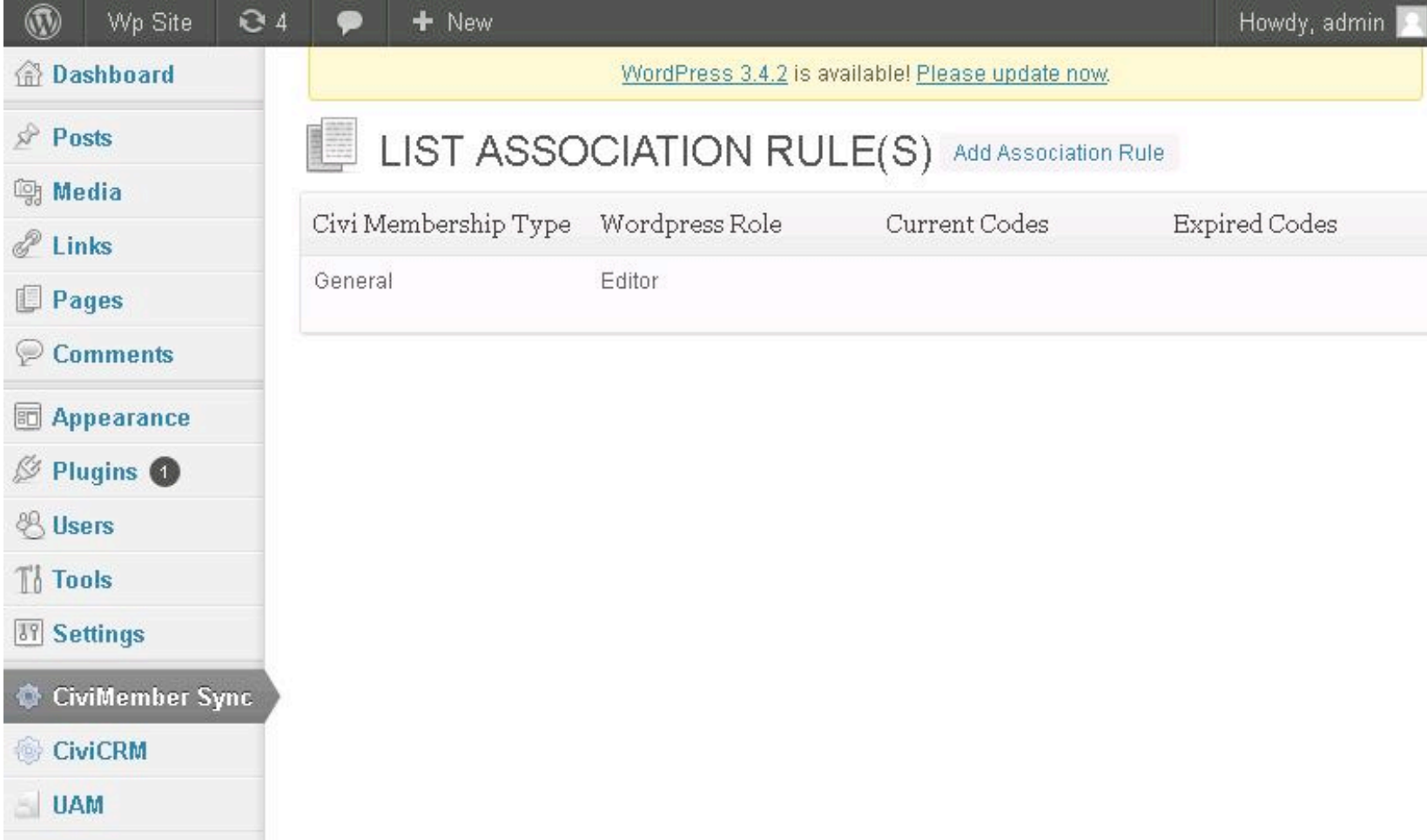


- Synchronize CiviCRM Contacts with Membership Status to a specified Wordpress Role automatically, when the user login/logout.

## Limitations

- Under early development
- CiviMember Status Rules to used for "Current" and "Expired" status.
- Need to do manual sync

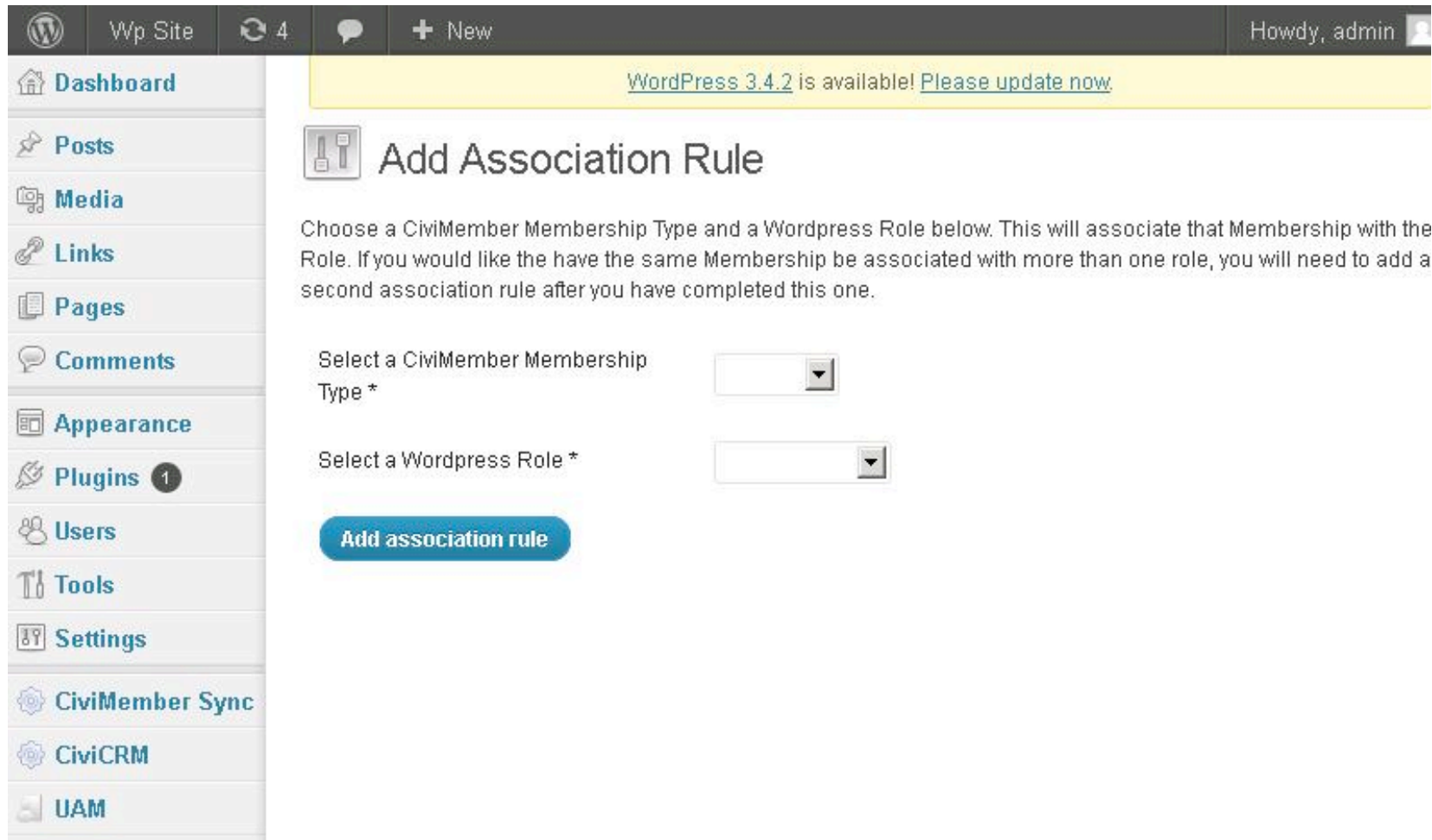
- List association rule(s)



The screenshot shows the WordPress dashboard interface. At the top, there's a navigation bar with 'Wp Site', a refresh icon, '4' notifications, a '+ New' button, and a user profile 'Howdy, admin'. Below this is a yellow notification banner: 'WordPress 3.4.2 is available! Please update now.' The left sidebar contains a menu with items: Dashboard, Posts, Media, Links, Pages, Comments, Appearance, Plugins (1), Users, Tools, Settings, CiviMember Sync (highlighted), CiviCRM, and UAM. The main content area is titled 'LIST ASSOCIATION RULE(S)' with an 'Add Association Rule' button. Below the title is a table with the following data:

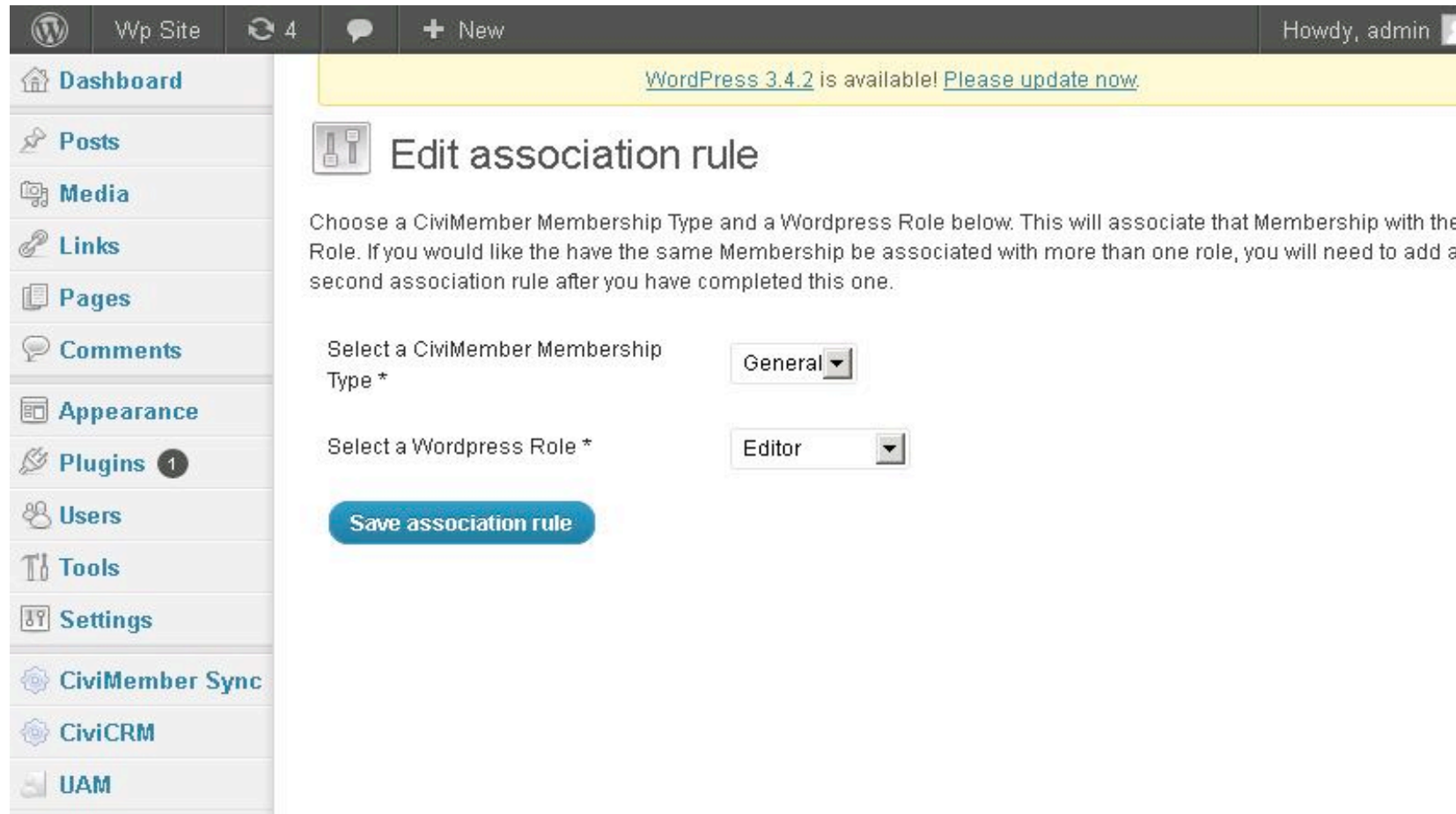
Civi Membership Type	Wordpress Role	Current Codes	Expired Codes
General	Editor		

- Add association rule



The screenshot shows the WordPress dashboard interface. At the top, there's a navigation bar with 'Wp Site', a refresh icon, '4' notifications, a '+ New' button, and a user profile 'Howdy, admin'. A yellow notification banner states 'WordPress 3.4.2 is available! Please update now.' The left sidebar contains menu items: Dashboard, Posts, Media, Links, Pages, Comments, Appearance, Plugins (1), Users, Tools, Settings, CiviMember Sync, CiviCRM, and UAM. The main content area is titled 'Add Association Rule' and includes the following text: 'Choose a CiviMember Membership Type and a Wordpress Role below. This will associate that Membership with the Role. If you would like the have the same Membership be associated with more than one role, you will need to add a second association rule after you have completed this one.' Below this text are two dropdown menus: 'Select a CiviMember Membership Type \*' and 'Select a Wordpress Role \*'. A blue button labeled 'Add association rule' is positioned at the bottom of the form.

- Edit association rule



The screenshot shows the WordPress dashboard interface. The top navigation bar includes the WordPress logo, 'Wp Site', a refresh icon with '4', a '+ New' button, and a user profile 'Howdy, admin'. A yellow notification banner at the top states 'WordPress 3.4.2 is available! Please update now.' The left sidebar contains a menu with items: Dashboard, Posts, Media, Links, Pages, Comments, Appearance, Plugins (with a '1' badge), Users, Tools, Settings, CiviMember Sync, CiviCRM, and UAM. The main content area is titled 'Edit association rule' and contains the following text: 'Choose a CiviMember Membership Type and a Wordpress Role below. This will associate that Membership with the Role. If you would like the have the same Membership be associated with more than one role, you will need to add a second association rule after you have completed this one.' Below this text are two dropdown menus: 'Select a CiviMember Membership Type \*' with 'General' selected, and 'Select a Wordpress Role \*' with 'Editor' selected. A blue 'Save association rule' button is positioned below the dropdowns.