
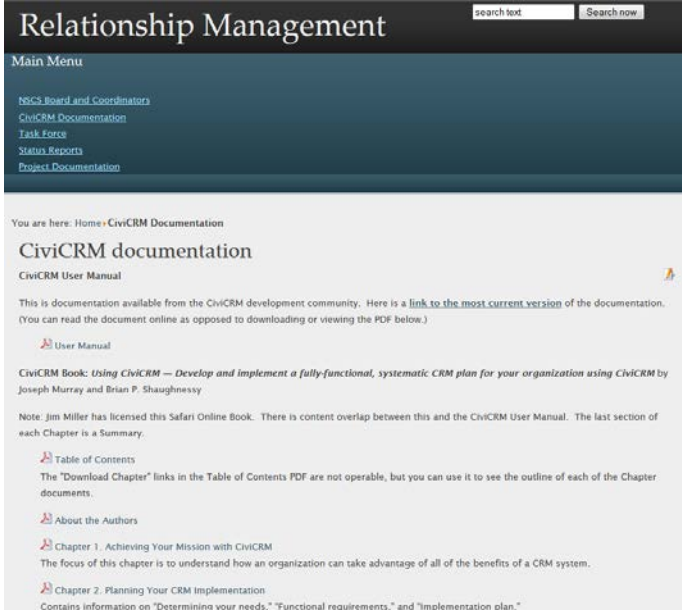
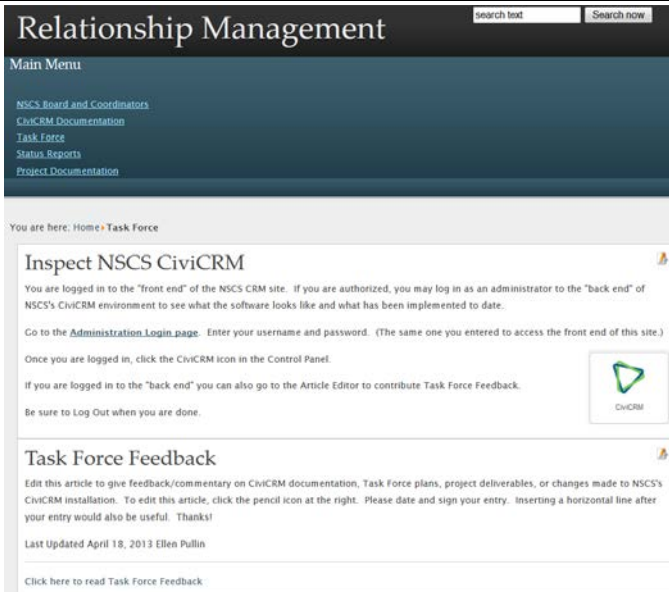

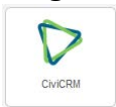

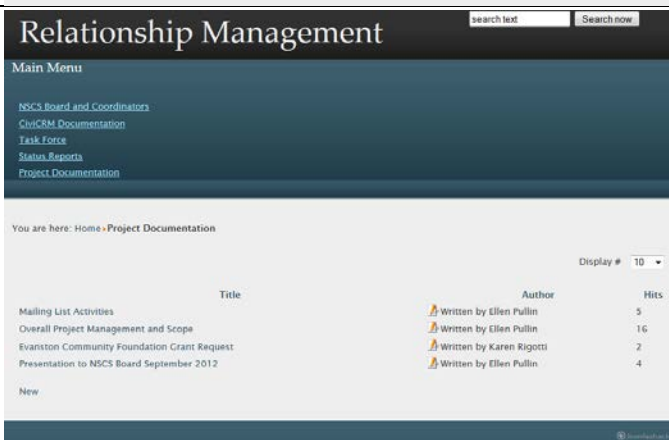


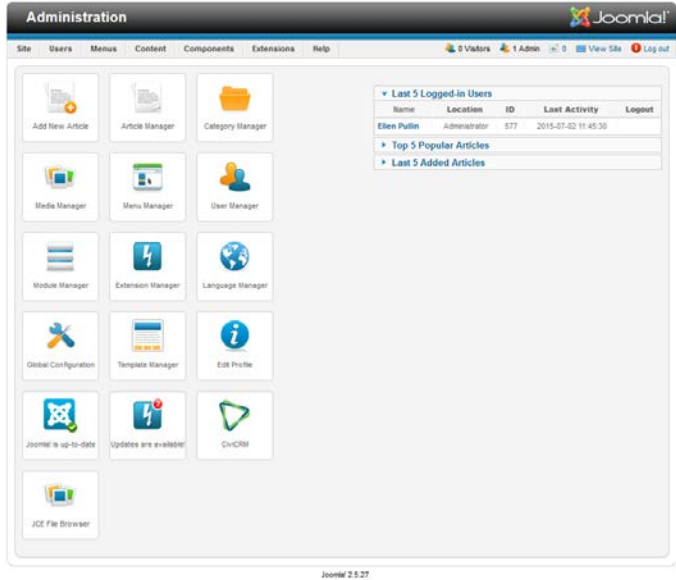



North Shore Choral Society Job Procedures: Computer Services Coordinator

Illustrations: Joomla! front end	Notes
<p>The NCS CRM Relationship Management website URL is https://nscscrm.northshorechoral.com/</p>	
	<p>1. This is the Home page. You must login to get to any other page. Clicking on the “click here” text or the NSCS logo takes you to the NSCS production site, implemented in a different Joomla! environment.</p>
<p>The rest of these illustrations assume you have been successful in logging in to the NCS CRM Joomla! Relationship Management website .</p>	
	<p>2. This is the CiviCRM documentation page, which is what you see after a successful login. Click the Relationship Management title at the top (or the NCS Board and Coordinators menu item) to return to the Home page. You can log out from there. (Logging out of the front end site does not affect your login status on the back end.)</p>

North Shore Choral Society Job Procedures: Computer Services Coordinator

Illustrations: Joomla! front end	Notes															
	<p>3. This is the Task Force page. The pencil/page icon  means your ID is authorized to update this “article” via the front end editor.</p> <p>Single-click the CiviCRM icon  to access the admin (back end) login page.</p>															
 <table border="1"> <thead> <tr> <th>Title</th> <th>Author</th> <th>Hits</th> </tr> </thead> <tbody> <tr> <td>Status to Board as of 05-11-2013</td> <td>Written by Renata Lowe and Ellen Pullin</td> <td>5</td> </tr> <tr> <td>Status to Board as of 04-13-2013</td> <td>Written by Ellen Pullin</td> <td>5</td> </tr> <tr> <td>Status to Board as of 03-09-2013</td> <td>Written by Ellen Pullin</td> <td>5</td> </tr> <tr> <td>Status to Board as of 02-09-2013</td> <td>Written by Ellen Pullin</td> <td>2</td> </tr> </tbody> </table>	Title	Author	Hits	Status to Board as of 05-11-2013	Written by Renata Lowe and Ellen Pullin	5	Status to Board as of 04-13-2013	Written by Ellen Pullin	5	Status to Board as of 03-09-2013	Written by Ellen Pullin	5	Status to Board as of 02-09-2013	Written by Ellen Pullin	2	<p>4. This is the Status Report page.</p>
Title	Author	Hits														
Status to Board as of 05-11-2013	Written by Renata Lowe and Ellen Pullin	5														
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Title	Author	Hits														
Mailing List Activities	Written by Ellen Pullin	5														
Overall Project Management and Scope	Written by Ellen Pullin	16														
Evanston Community Foundation Grant Request	Written by Karen Rigotti	2														
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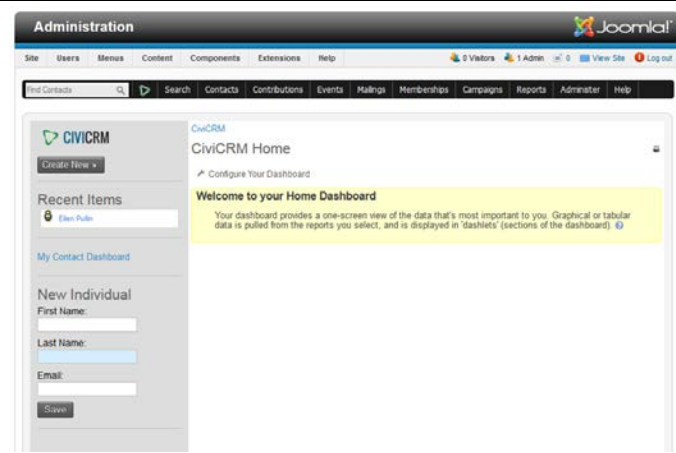
North Shore Choral Society Job Procedures: Computer Services Coordinator

Illustrations: Joomla! back end	Notes
<p>The NCS CRM Relationship Management administration website URL is https://nscscrm.northshorechoral.com/</p> <p>These illustrations assume you have been successful in logging in to the NCS CRM Joomla! administration environment .</p>	
 <p>The screenshot shows the Joomla! Administration interface. At the top, there is a navigation menu with options like Site, Users, Menus, Content, Components, Extensions, and Help. Below the menu is a grid of icons for various management tasks: Add New Article, Article Manager, Category Manager, Media Manager, Menu Manager, User Manager, Module Manager, Extension Manager, Language Manager, Global Configuration, Template Manager, Edit Profile, Joomla! is up-to-date, Updates are available, CiviCRM, and JCE File Browser. On the right side, there is a 'Last 5 Logged-in Users' table with columns for Name, Location, ID, Last Activity, and Logout. The table lists one user: Eben Pullin, Administrator, ID 577, Last Activity 2015-07-02 11:45:30. Below the table are links for 'Top 5 Popular Articles' and 'Last 5 Added Articles'. The Joomla! logo and version number (2.5.27) are visible at the bottom.</p>	<p>1. This is the Control Panel, which is the program which manages the NCS Relationship Management website. Single-click any icon to access that component. (The arrangement of the icons changes depending on the dimensions of the window.)</p>
 <p>The icon for User Manager, featuring two stylized human figures in orange and blue above the text 'User Manager'.</p>	<p>2. This is the shortcut for User Manager, which is the component which manages access to the NCS Relationship Management website. Single-click the icon to view the list of Joomla! users. Click the first item in the Site menu to return to the Control Panel.</p>
 <p>The icon for Edit Profile, featuring a blue circle with a white lowercase 'i' inside, above the text 'Edit Profile'.</p>	<p>3. This is the shortcut which allows you to update your own profile (Name, Login Name, Password, Email). Single-click the icon to access.</p>
 <p>The icon for CiviCRM, featuring a green and blue geometric shape above the text 'CiviCRM'.</p>	<p>4. This is the shortcut for CiviCRM, which is the component which manages the NCS Relationship Management database and its content. Single-click the icon to access CiviCRM.</p>

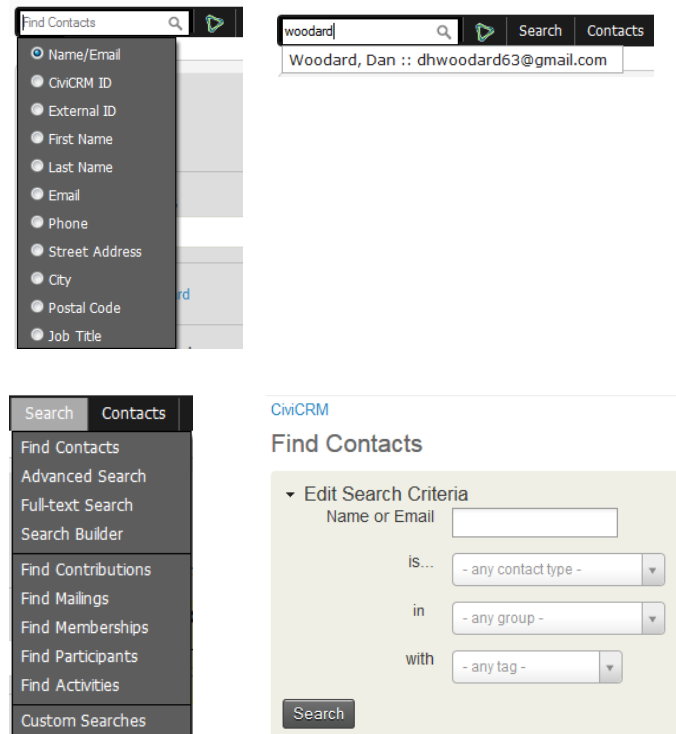
North Shore Choral Society Job Procedures: Computer Services Coordinator

Illustrations: CiviCRM (Contacts)	Notes
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These illustrations assume you have been successful in logging in to the **NSCSCR** Joomla! environment.

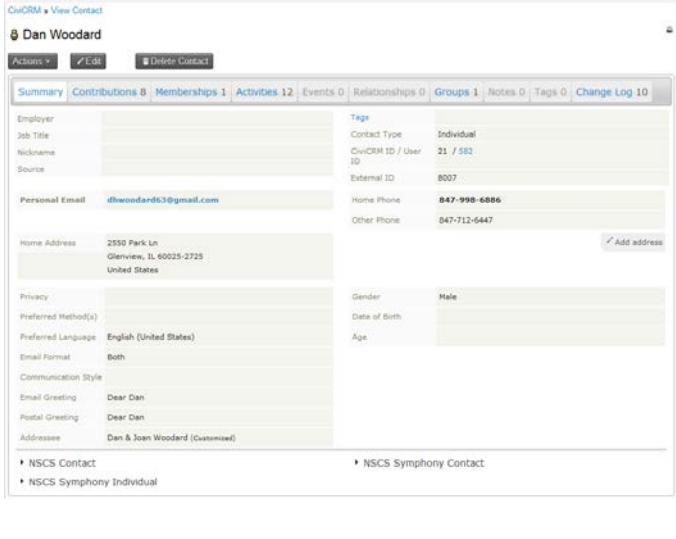
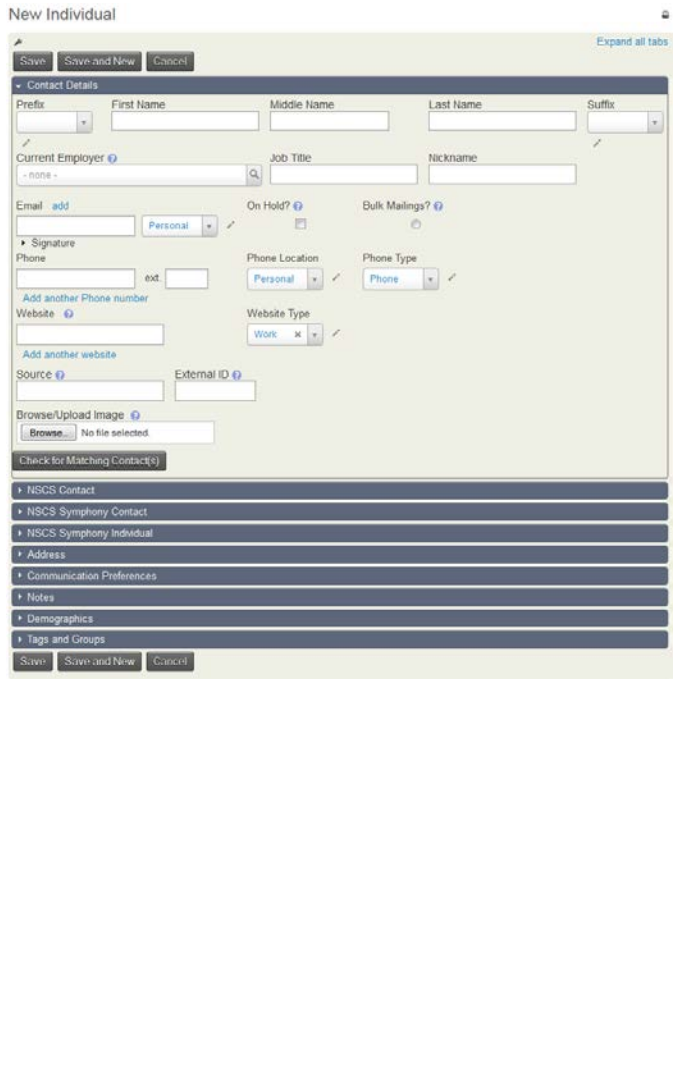


1. This is the **CiviCRM Home** page.
Note: Dashboard Configuration is not currently working for CiviCRM implementations using Joomla!; a continual "Loading..." message is displayed for any 'dashlets' selected by an administrator.

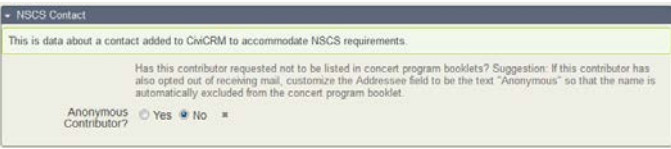

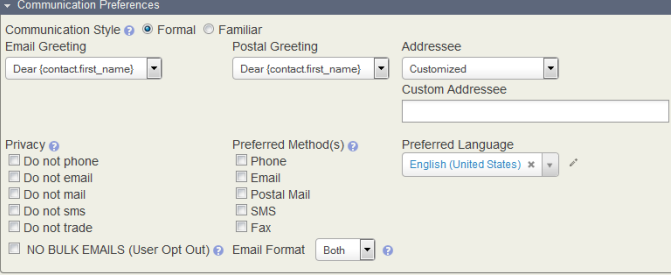
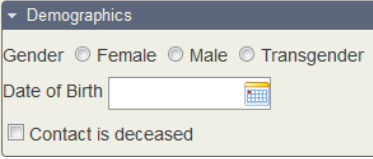
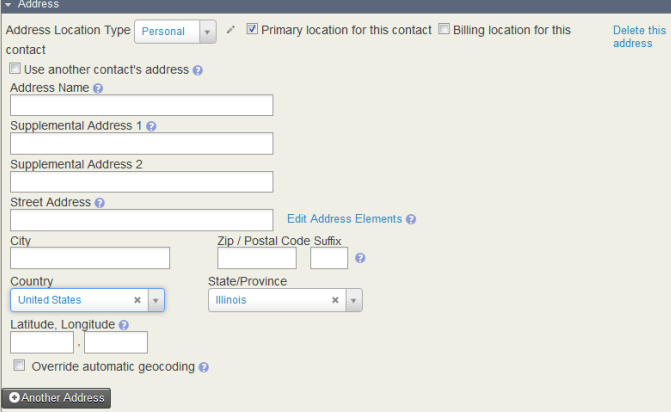


Contact Searches
 2. There are multiple ways to search for a contact to initiate an update for that contact's info, or for other data related to that contact (contributions, ticket purchases, membership info)

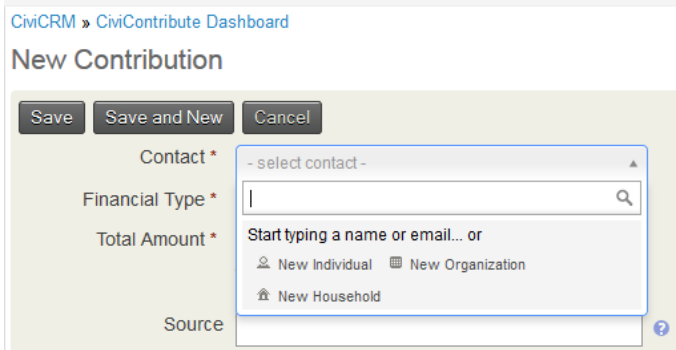
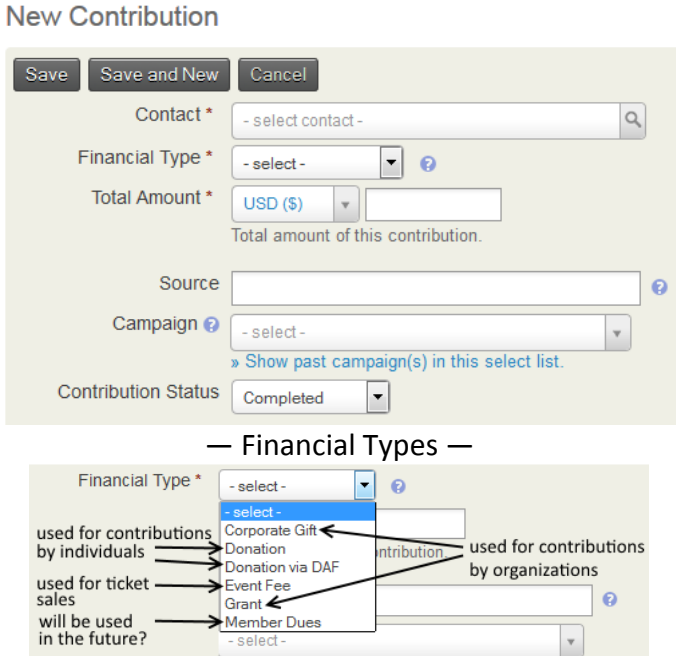
North Shore Choral Society Job Procedures: Computer Services Coordinator

Illustrations: CiviCRM (Contacts)	Notes
	<p>Contact Data Update</p> <p>3. To update info for a specific contact already in CiviCRM, start with the View Contact screen. Mouse over specific sections (email, phone, address, communication preferences, etc.) for the option to update just that data. The NSCS sections represent data imported from dBase, or custom data added for NSCS. The External ID field is the NSCS dBase ID.</p>
	<p>4. The screen to enter data for a New Individual looks different.</p> <p>The Notes section can be used to record explanations when there are multiple email or phone numbers entered, particularly when more than one person is involved. CiviCRM intends that an Individual record represent just one person. However, instead of creating Households and linking Individuals, we are using the Custom Addressee (in Communication Preferences) to contain names of couples for addressing envelopes and printing concert program booklet acknowledgments.</p> <p>Use & instead of “ <i>and</i> ” in the Custom Addressee field.</p> <p>If an email “bounces”, mark it as On Hold? rather than deleting it, unless notified that the contact is no longer using that account.</p>

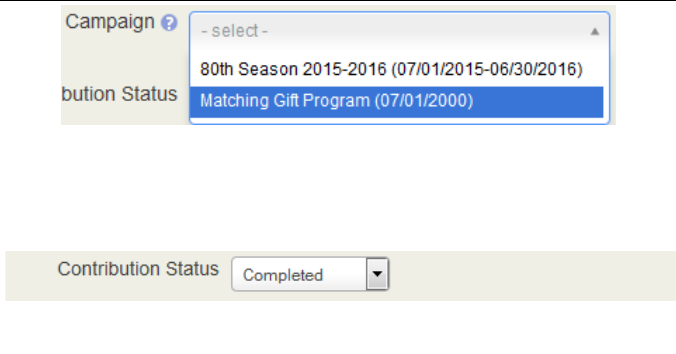
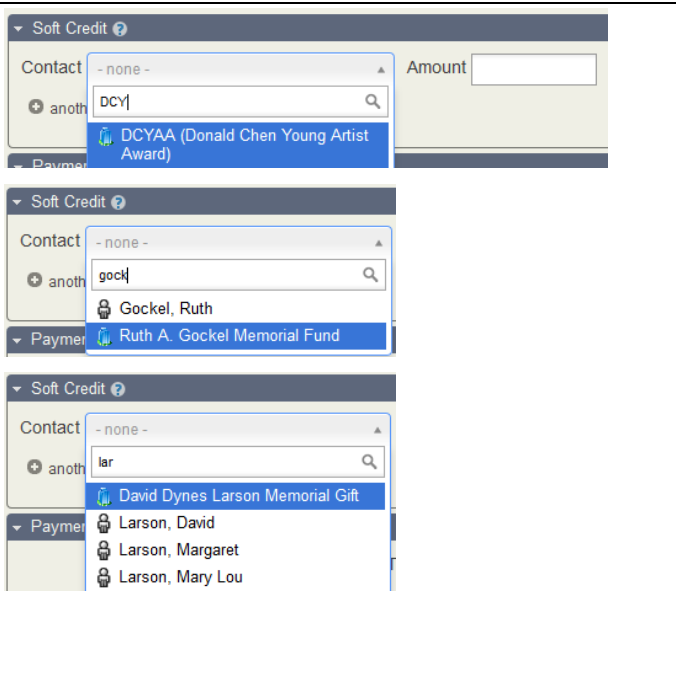
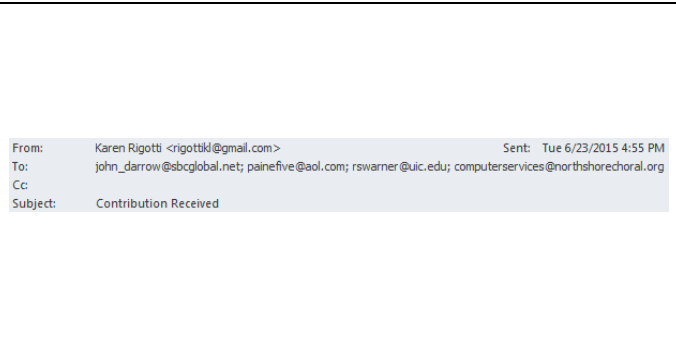
North Shore Choral Society Job Procedures: Computer Services Coordinator

Illustrations: CiviCRM (Contacts)	Notes
	<p>5. This field should be marked Yes only when entering contact data for a new contributor who has asked to be anonymous.</p>
	<p>6. These sections represent data imported from dBase and do not need to be populated when entering new contacts in CiviCRM.</p>
	<p>7. The Privacy fields distinguish between different types of communication methods. Do not mail corresponds to the dBase MAILING = FALSE. The Opt Out (unsubscribe) for bulk emails is recorded here.</p>
	<p>8. We don't usually record Gender or Date of Birth data. The Contact is deceased field may be useful because it is prominently displayed and selection logic may ask if you want to exclude deceased individuals. (We do have some, because we imported their donations/member info.)</p>
	<p>9. CiviCRM can record multiple addresses for a contact. Addresses are identified as "Billing location" when the only way we found out about them is from a PayPal transaction. PO BOX info must be entered in Supplemental Address 1, not Street Address.</p>

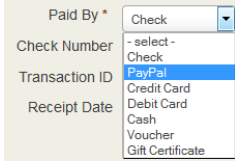
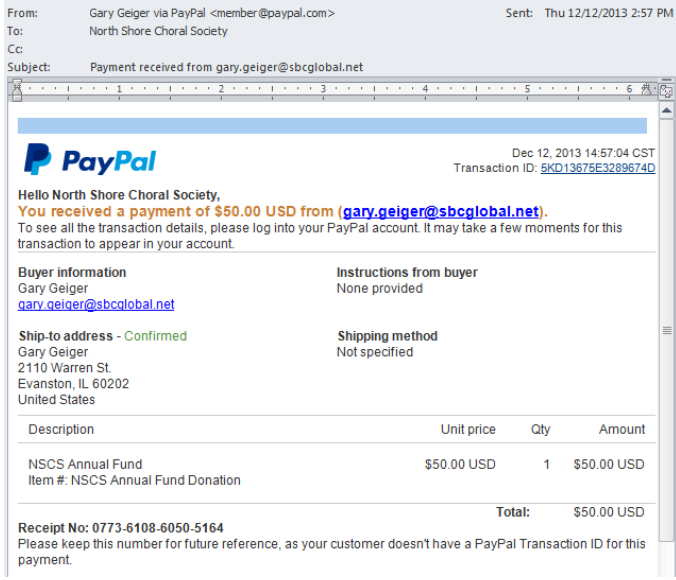
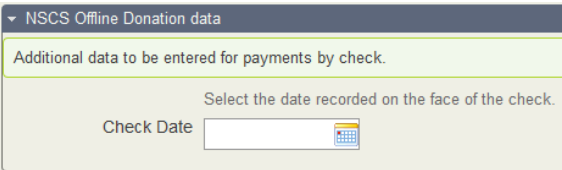
North Shore Choral Society Job Procedures: Computer Services Coordinator

Illustrations: CiviCRM (Contributions)	Notes
<p>These illustrations assume you have been successful in logging in to the NSCSCRM Joomla! environment.</p>	
 <p>CiviCRM » CiviContribute Dashboard New Contribution</p> <p>Buttons: Save, Save and New, Cancel</p> <p>Contact * -- select contact -</p> <p>Financial Type * [input field]</p> <p>Total Amount * [input field]</p> <p>Source [input field]</p> <p>Dropdown options: New Individual, New Organization, New Household</p>	<p>New Contribution</p> <p>1. To enter a contribution, start with Contact selection. If the search for an individual or organization is unsuccessful, you can enter minimal information to establish a new contact, and go the Contract Data Update to add data after the contribution is entered. An asterisk * identifies required fields.</p>
 <p>New Contribution</p> <p>Buttons: Save, Save and New, Cancel</p> <p>Contact * - select contact -</p> <p>Financial Type * - select -</p> <p>Total Amount * USD (\$) [input field]</p> <p>Source [input field]</p> <p>Campaign - select -</p> <p>Contribution Status Completed</p> <p>— Financial Types —</p> <p>Financial Type * - select -</p> <ul style="list-style-type: none"> Corporate Gift ← used for contributions by individuals Donation ← used for contributions by organizations Donation via DAF ← used for contributions by organizations Event Fee ← used for ticket sales Grant ← will be used in the future? Member Dues ← will be used in the future? 	<p>2. After selecting or creating a contact, select the appropriate Financial Type (usually <i>Donation</i> for individual contributions) and enter the Total Amount.</p> <p>For Source, specify how Computer Services was first informed of this contribution (usually <i>Karen Rigotti email</i> or <i>John Darrow email</i>, but sometimes <i>PayPal</i>).</p> <p>However, for <i>Donation via DAF</i> put the DAF name in Source. (Usually <i>The Northern Trust Charitable Giving Program</i> (Darrow), or <i>Fidelity Gift Trust</i> (Miller), or <i>Anthony and Leslie Green Charitable Foundation at Schwab</i>).</p>

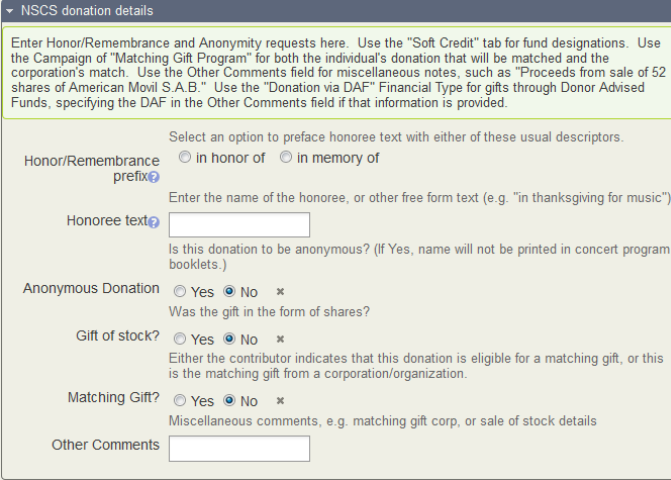
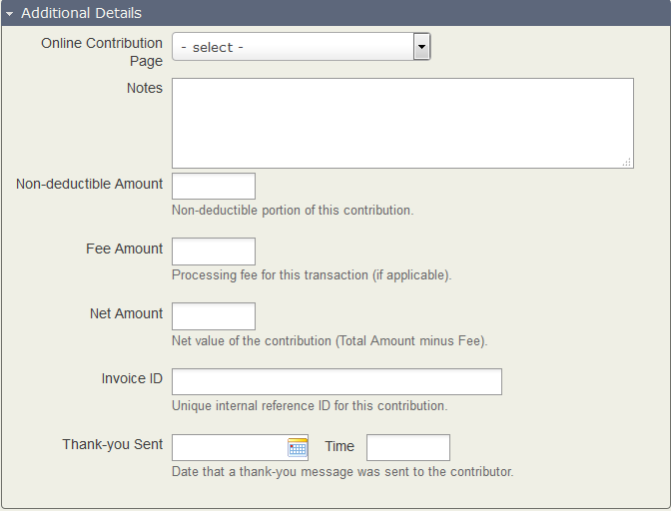
North Shore Choral Society Job Procedures: Computer Services Coordinator

Illustrations: CiviCRM (Contributions)	Notes
	<p>3. If this is a matching gift (either an individual's gift that will be matched or a corporate gift that is the match), select the <i>Matching Gift Program</i> campaign.</p> <p>Let the Contribution Status default to <i>Completed</i>.</p>
	<p>4. If all or a portion of a gift is to be allocated to a Designated Use Fund (<i>DCYAA, Larson, or Gockel</i>), use the Soft Credit section to specify this.</p> <p>Each of these funds has been defined as an Organization, so just start typing one of those three in the Contact search field and select it when it is displayed.</p> <p>Put the amount to be allocated to the fund in the Amount field. (You don't need to put in the dollar sign.) You can leave the Type field blank (<i>-none-</i>)</p>
	<p>5. Within the Payment Details section, the Received date and Time fields should be the Sent date from the notification email.</p> <p>Paid By is usually <i>Check</i> (default). We don't currently record the Check Number.</p>

North Shore Choral Society Job Procedures: Computer Services Coordinator

Illustrations: CiviCRM (Contributions)	Notes																
 <p>Paid By * <input type="checkbox"/> Check - select - <input checked="" type="checkbox"/> Check <input type="checkbox"/> PayPal <input type="checkbox"/> Credit Card <input type="checkbox"/> Debit Card <input type="checkbox"/> Cash <input type="checkbox"/> Voucher <input type="checkbox"/> Gift Certificate</p> <p>From: Gary Geiger via PayPal <member@paypal.com> Sent: Thu 12/12/2013 2:57 PM To: North Shore Choral Society Cc: Subject: Payment received from gary.geiger@sbcglobal.net</p> <p>Dec 12, 2013 14:57:04 CST Transaction ID: 5KD13675E3289674D</p> <p>Hello North Shore Choral Society,</p>	<p>6. Occasionally we receive donations via PayPal; in that case, PayPal should be selected as the Paid By value, and the Transaction ID copied from the PayPal email.</p>																
 <p>From: Gary Geiger via PayPal <member@paypal.com> Sent: Thu 12/12/2013 2:57 PM To: North Shore Choral Society Cc: Subject: Payment received from gary.geiger@sbcglobal.net</p> <p>Dec 12, 2013 14:57:04 CST Transaction ID: 5KD13675E3289674D</p> <p>Hello North Shore Choral Society, You received a payment of \$50.00 USD from (gary.geiger@sbcglobal.net). To see all the transaction details, please log into your PayPal account. It may take a few moments for this transaction to appear in your account.</p> <table border="0"> <tr> <td>Buyer information Gary Geiger gary.geiger@sbcglobal.net</td> <td>Instructions from buyer None provided</td> </tr> <tr> <td>Ship-to address - Confirmed Gary Geiger 2110 Warren St Evanston, IL 60202 United States</td> <td>Shipping method Not specified</td> </tr> </table> <table border="1"> <thead> <tr> <th>Description</th> <th>Unit price</th> <th>Qty</th> <th>Amount</th> </tr> </thead> <tbody> <tr> <td>NSCS Annual Fund Item #: NSCS Annual Fund Donation</td> <td>\$50.00 USD</td> <td>1</td> <td>\$50.00 USD</td> </tr> <tr> <td colspan="3" style="text-align: right;">Total:</td> <td>\$50.00 USD</td> </tr> </tbody> </table> <p>Receipt No: 0773-6108-6050-5164 Please keep this number for future reference, as your customer doesn't have a PayPal Transaction ID for this payment.</p>	Buyer information Gary Geiger gary.geiger@sbcglobal.net	Instructions from buyer None provided	Ship-to address - Confirmed Gary Geiger 2110 Warren St Evanston, IL 60202 United States	Shipping method Not specified	Description	Unit price	Qty	Amount	NSCS Annual Fund Item #: NSCS Annual Fund Donation	\$50.00 USD	1	\$50.00 USD	Total:			\$50.00 USD	<p>7. For a PayPal transaction, there is sometimes a Receipt No. Receipt No: 1901-9949-7446-5702 printed below the total line, with the text "Please keep this number for future reference, as your customer doesn't have a PayPal Transaction ID for this payment." This line may be copied and pasted into the Notes field of the Additional Details tab. (See #10 below.)</p>
Buyer information Gary Geiger gary.geiger@sbcglobal.net	Instructions from buyer None provided																
Ship-to address - Confirmed Gary Geiger 2110 Warren St Evanston, IL 60202 United States	Shipping method Not specified																
Description	Unit price	Qty	Amount														
NSCS Annual Fund Item #: NSCS Annual Fund Donation	\$50.00 USD	1	\$50.00 USD														
Total:			\$50.00 USD														
 <p>NSCS Offline Donation data</p> <p>Additional data to be entered for payments by check.</p> <p>Select the date recorded on the face of the check.</p> <p>Check Date <input type="text"/></p>	<p>8. Although we don't record check number, we <u>do</u> record the date of the check, which is the date specified in notification emails. This is recorded within the NSCS Offline Donation data section.</p>																

North Shore Choral Society Job Procedures: Computer Services Coordinator

Illustrations: CiviCRM (Contributions)	Notes
 <p>Enter Honor/Remembrance and Anonymity requests here. Use the "Soft Credit" tab for fund designations. Use the Campaign of "Matching Gift Program" for both the individual's donation that will be matched and the corporation's match. Use the Other Comments field for miscellaneous notes, such as "Proceeds from sale of 52 shares of American Movil S.A.B." Use the "Donation via DAF" Financial Type for gifts through Donor Advised Funds, specifying the DAF in the Other Comments field if that information is provided.</p> <p>Select an option to preface honoree text with either of these usual descriptors. Honor/Remembrance prefix? <input type="radio"/> in honor of <input type="radio"/> in memory of</p> <p>Honoree text? <input type="text"/></p> <p>Is this donation to be anonymous? (If Yes, name will not be printed in concert program booklets.) Anonymous Donation <input type="radio"/> Yes <input checked="" type="radio"/> No ✕</p> <p>Was the gift in the form of shares? Gift of stock? <input type="radio"/> Yes <input checked="" type="radio"/> No ✕</p> <p>Either the contributor indicates that this donation is eligible for a matching gift, or this is the matching gift from a corporation/organization. Matching Gift? <input type="radio"/> Yes <input checked="" type="radio"/> No ✕</p> <p>Miscellaneous comments, e.g. matching gift corp, or sale of stock details Other Comments <input type="text"/></p>	<p>9. Other info specific to NSCS is entered in the NSCS Donation Details section. (There is some NSCS-specific Help text displayed at the beginning of this section.)</p> <p>Be sure to use & instead of “ <i>and</i> ” in the Honoree text field. (Patron & Concert Program Booklet Coordinator request)</p>
 <p>Additional Details</p> <p>Online Contribution Page <input type="text" value="- select -"/></p> <p>Notes <input type="text"/></p> <p>Non-deductible Amount <input type="text"/> Non-deductible portion of this contribution.</p> <p>Fee Amount <input type="text"/> Processing fee for this transaction (if applicable).</p> <p>Net Amount <input type="text"/> Net value of the contribution (Total Amount minus Fee).</p> <p>Invoice ID <input type="text"/> Unique internal reference ID for this contribution.</p> <p>Thank-you Sent <input type="text"/> Time <input type="text"/> Date that a thank-you message was sent to the contributor.</p>	<p>10. The Additional Details section contains CiviCRM fields that we might use some day; for now if we need a place to put the <i>PayPal Receipt Number</i>, that text and the number itself (1901-9949-7446-5702) can be recorded in the Notes field of this section.</p>