
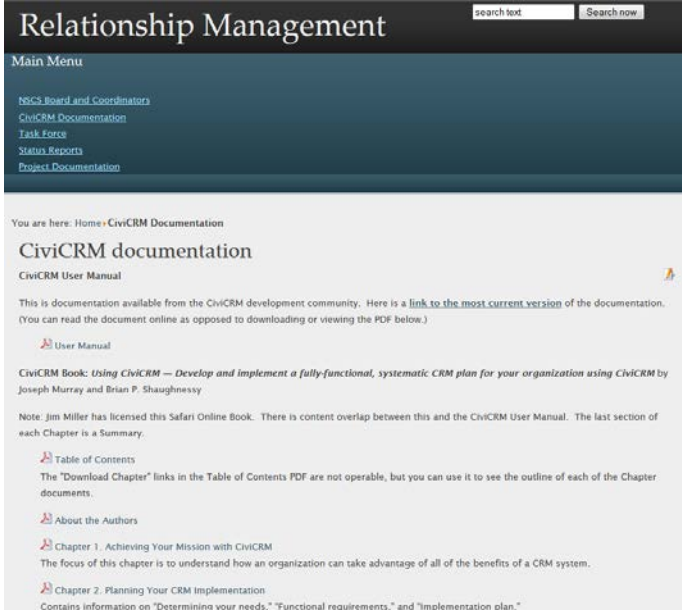
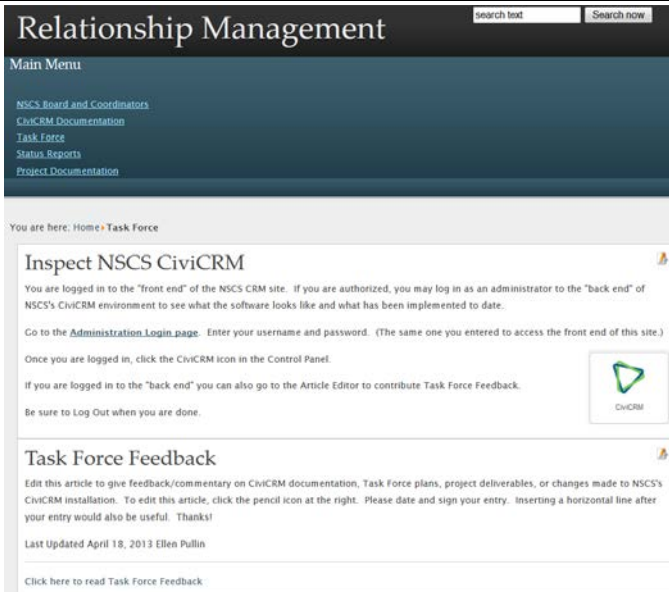

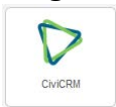

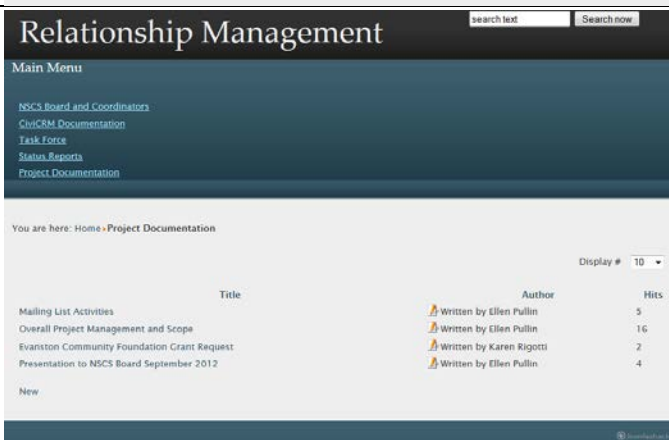


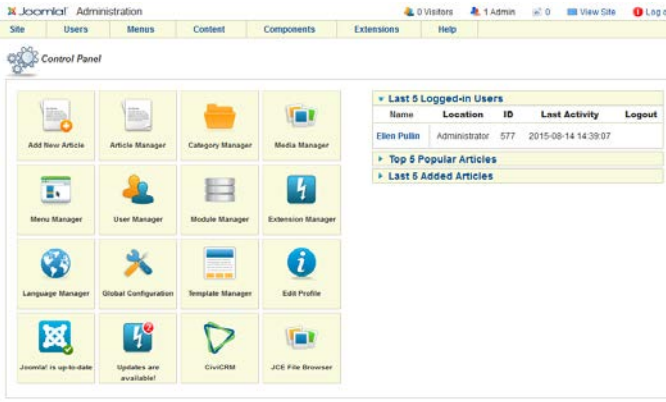
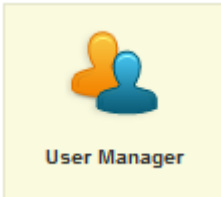
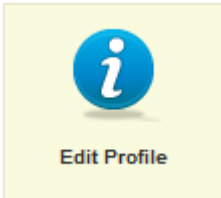

# North Shore Choral Society Job Procedures: Computer Services Coordinator

Illustrations: Joomla! front end	Notes
<p>The <b>NCS CRM</b> Relationship Management website URL is <a href="https://nscscrm.northshorechoral.com/">https://nscscrm.northshorechoral.com/</a></p>	
	<p>1. This is the <b>Home page</b>. 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 <b>NCS CRM</b> Joomla! Relationship Management website .</p>	
	<p>2. This is the <b>CiviCRM documentation page</b>, which is what you see after a successful login. Click the <b>Relationship Management</b> title at the top (or the <b>NCS Board and Coordinators</b> menu item) to return to the <b>Home page</b>. You can log out from there. (Logging out of the front end site does not affect your login status on the back end.)</p>

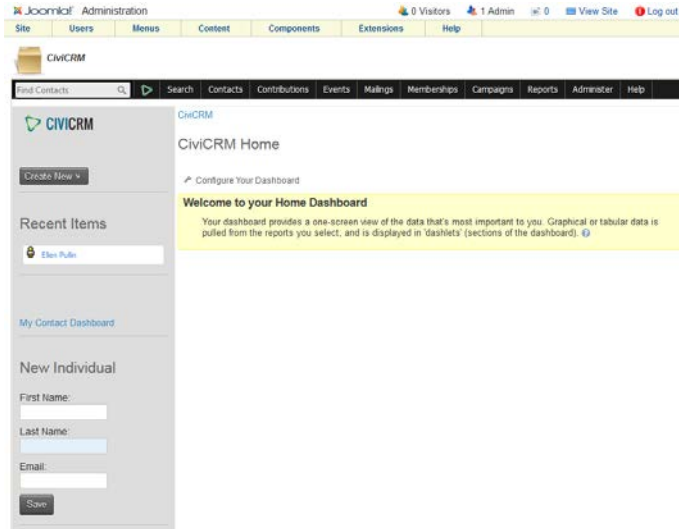
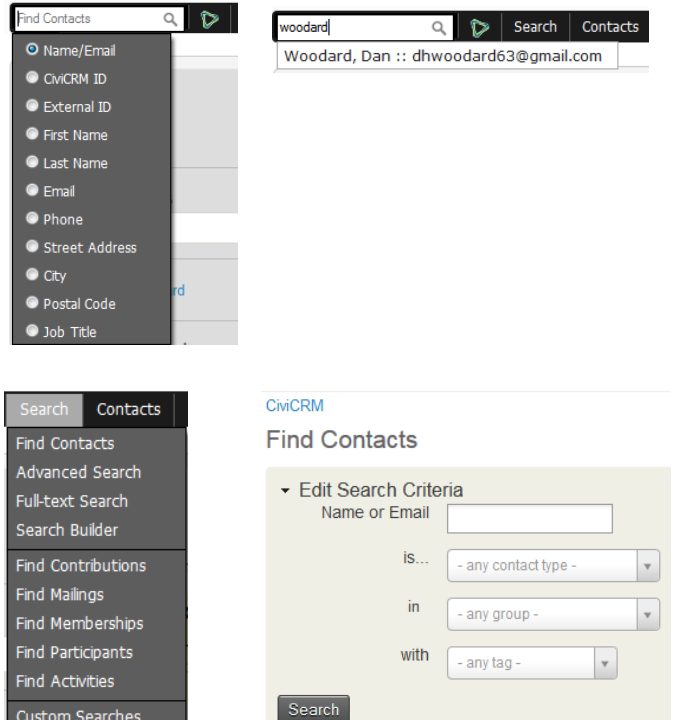
# North Shore Choral Society Job Procedures: Computer Services Coordinator

Illustrations: Joomla! front end	Notes															
	<p>3. This is the <b>Task Force</b> 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 <b>Status Report</b> page.</p>
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														
 <table border="1"> <thead> <tr> <th>Title</th> <th>Author</th> <th>Hits</th> </tr> </thead> <tbody> <tr> <td>Mailing List Activities</td> <td>Written by Ellen Pullin</td> <td>5</td> </tr> <tr> <td>Overall Project Management and Scope</td> <td>Written by Ellen Pullin</td> <td>16</td> </tr> <tr> <td>Evanston Community Foundation Grant Request</td> <td>Written by Karen Rigotti</td> <td>2</td> </tr> <tr> <td>Presentation to NSCS Board September 2012</td> <td>Written by Ellen Pullin</td> <td>4</td> </tr> </tbody> </table>	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	Presentation to NSCS Board September 2012	Written by Ellen Pullin	4	<p>5. This is the <b>Project Documentation</b> page.</p>
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														
Presentation to NSCS Board September 2012	Written by Ellen Pullin	4														

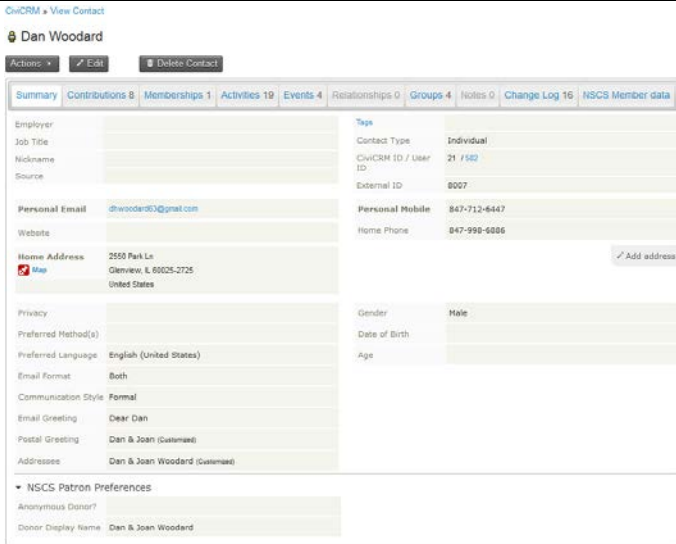
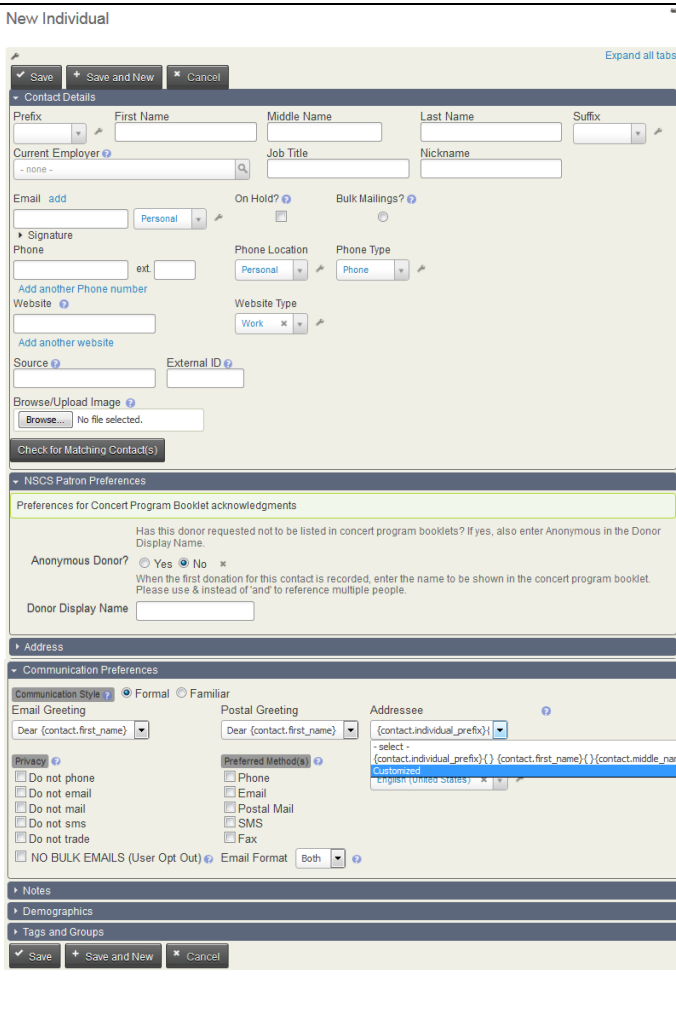
# North Shore Choral Society Job Procedures: Computer Services Coordinator

Illustrations: Joomla! back end	Notes
<p>The <b>NCSCRM</b> Relationship Management administration website URL is <a href="https://nscscrm.northshorechoral.com/">https://nscscrm.northshorechoral.com/</a></p> <p>These illustrations assume you have been successful in logging in to the <b>NCSCRM</b> Joomla! administration environment .</p>	
 <p>The screenshot shows the Joomla! Administration Control Panel. It features 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, and Edit Profile. On the right, there are sections for 'Last 5 Logged-in Users' (listing Elen Puhla) and 'Top 5 Popular Articles'.</p>	<p>1. This is the <b>Control Panel</b>, 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, showing two stylized human figures in orange and blue.</p>	<p>2. This is the shortcut for <b>User Manager</b>, 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 <b>Control Panel</b>.</p>
 <p>The icon for Edit Profile, featuring a blue circle with a white lowercase letter 'i'.</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, showing a green triangle with a white outline.</p>	<p>4. This is the shortcut for <b>CiviCRM</b>, which is the component which manages the NCS Relationship Management database and its content. Single-click the icon to access CiviCRM.</p>

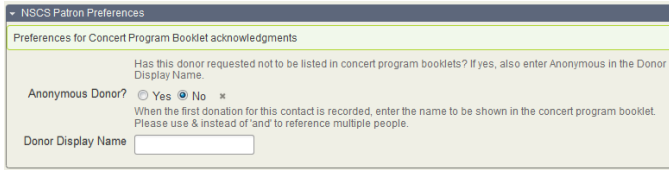
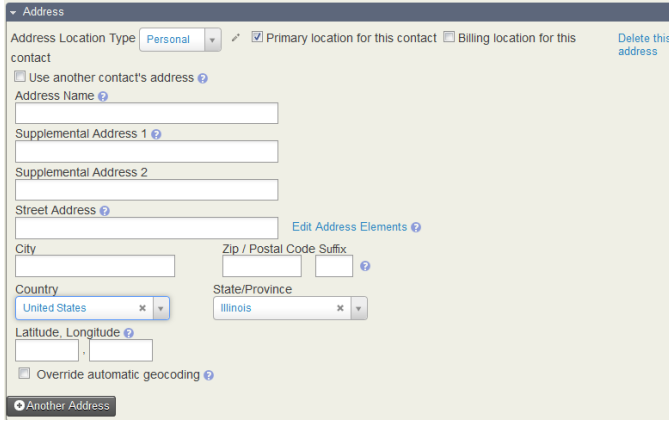
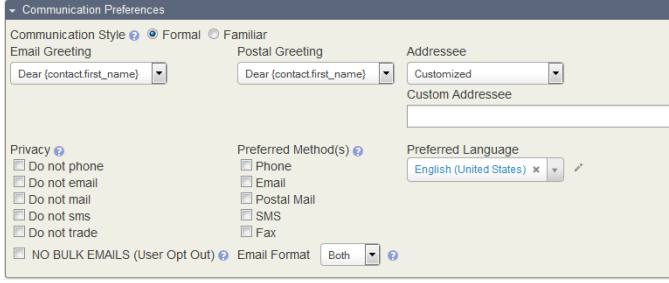
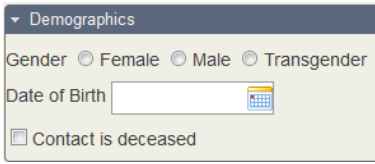
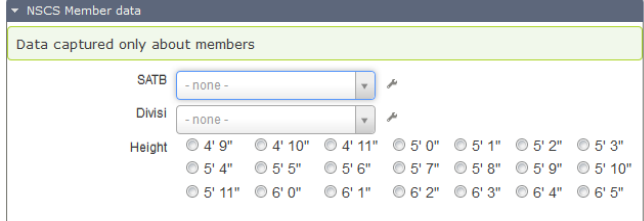
# North Shore Choral Society Job Procedures: Computer Services Coordinator

Illustrations: CiviCRM (Contacts)	Notes
<p>These illustrations assume you have been successful in logging in to the <b>NSCSCRIM Joomla!</b> environment.</p>	
	<p>1. This is the <b>CiviCRM Home</b> page.</p> <p><b>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.</b></p>
	<p><b>Contact Searches</b></p> <p>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)</p>

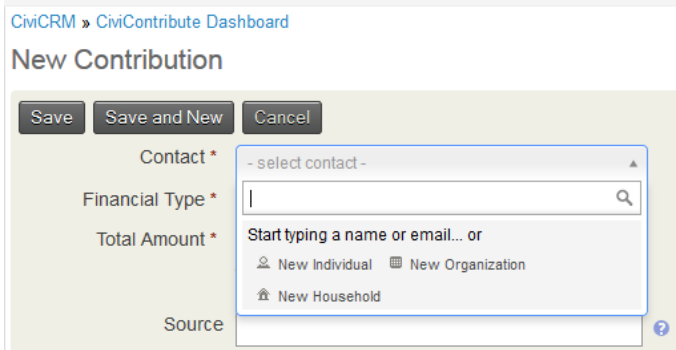
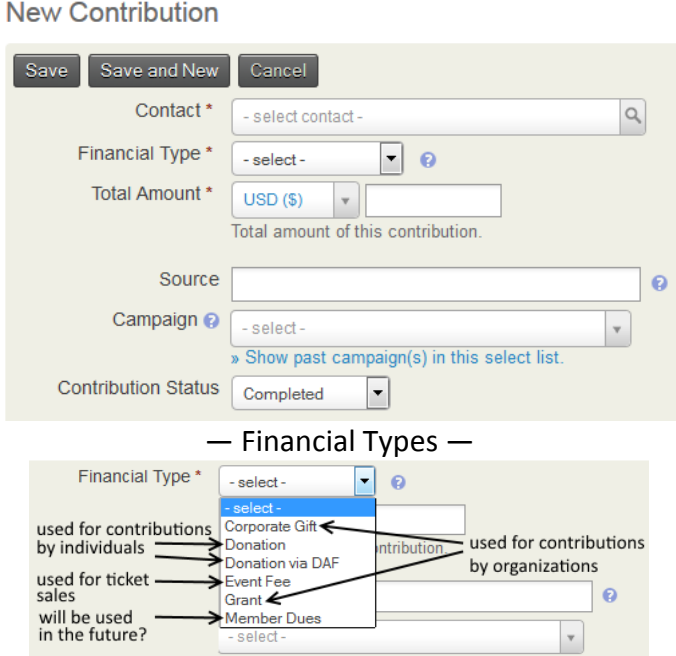
# North Shore Choral Society Job Procedures: Computer Services Coordinator

Illustrations: CiviCRM (Contacts)	Notes
	<p><b>Contact Data Update</b></p> <p>3. To update info for a specific contact already in CiviCRM, start with the <b>View Contact</b> screen. Mouse over specific sections (email, phone, address, communication preferences, etc.) for the option to update just that data. The <b>NSCS Member data</b> tab has data only captured for members. The <b>External ID</b> field is the NSCS dBase ID.</p>
	<p>4. The screen to enter data for a New Individual looks different.</p> <p>The <b>Notes</b> 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 <b>Custom Addressee</b> (in <b>Communication Preferences</b>) to contain names of couples to be used for addressing envelopes. Use <b>&amp;</b> instead of “<i>and</i>” in the <b>Custom Addressee</b> field.</p> <p>If an email “bounces”, mark it as <b>On Hold?</b> rather than deleting it, unless notified that the contact is no longer using that account.</p>

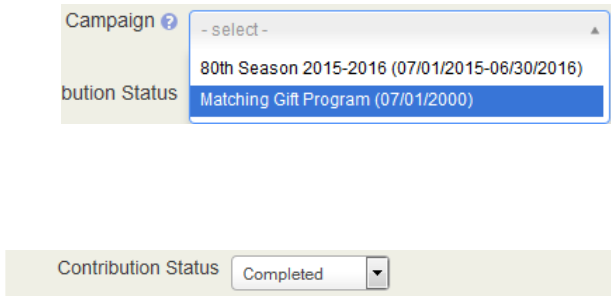
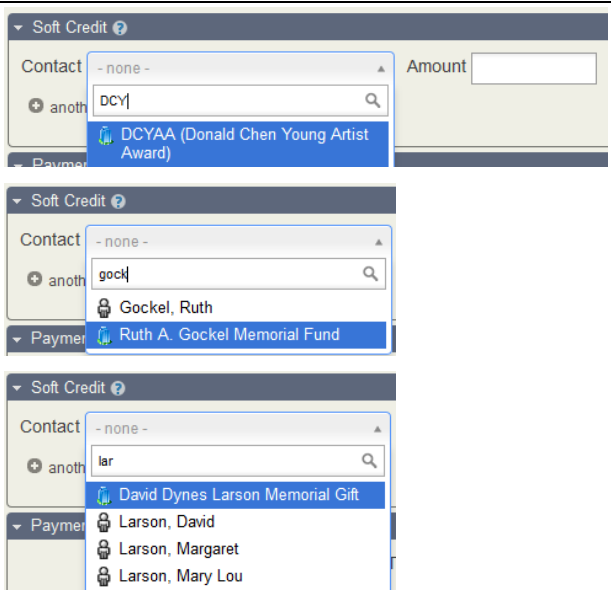

# North Shore Choral Society Job Procedures: Computer Services Coordinator

Illustrations: CiviCRM (Contacts)	Notes
 <p>NSCS Patron Preferences Preferences for Concert Program Booklet acknowledgments</p> <p>Has this donor requested not to be listed in concert program booklets? If yes, also enter Anonymous in the Donor Display Name.</p> <p>Anonymous Donor? <input type="radio"/> Yes <input checked="" type="radio"/> No *</p> <p>When the first donation for this contact is recorded, enter the name to be shown in the concert program booklet. Please use &amp; instead of 'and' to reference multiple people.</p> <p>Donor Display Name <input type="text"/></p>	<p>5. Use the <b>Patron Preferences</b> section used to enter preferences the first time a contribution is received from a contact.</p>
 <p>Address</p> <p>Address Location Type <b>Personal</b> <input checked="" type="checkbox"/> Primary location for this contact <input type="checkbox"/> Billing location for this contact <a href="#">Delete this address</a></p> <p><input type="checkbox"/> Use another contact's address</p> <p>Address Name <input type="text"/></p> <p>Supplemental Address 1 <input type="text"/></p> <p>Supplemental Address 2 <input type="text"/></p> <p>Street Address <input type="text"/> <a href="#">Edit Address Elements</a></p> <p>City <input type="text"/> Zip / Postal Code Suffix <input type="text"/></p> <p>Country <b>United States</b> State/Province <b>Illinois</b></p> <p>Latitude, Longitude <input type="text"/></p> <p><input type="checkbox"/> Override automatic geocoding</p> <p><a href="#">Another Address</a></p>	<p>6. 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.</p> <p><b>PO BOX info must be entered in Supplemental Address 1, (or Supplemental Address 2 if Supplemental Address 1 is being used for something else) not Street Address.</b></p>
 <p>Communication Preferences</p> <p>Communication Style <input checked="" type="radio"/> Formal <input type="radio"/> Familiar</p> <p>Email Greeting <b>Dear {contact_first_name}</b> Postal Greeting <b>Dear {contact_first_name}</b> Addressee <b>Customized</b></p> <p>Custom Addressee <input type="text"/></p> <p>Privacy <input type="checkbox"/> Do not phone <input type="checkbox"/> Do not email <input type="checkbox"/> Do not mail <input type="checkbox"/> Do not sms <input type="checkbox"/> Do not trade</p> <p>Preferred Method(s) <input type="checkbox"/> Phone <input type="checkbox"/> Email <input type="checkbox"/> Postal Mail <input type="checkbox"/> SMS <input type="checkbox"/> Fax</p> <p>Preferred Language <b>English (United States)</b></p> <p><input type="checkbox"/> NO BULK EMAILS (User Opt Out) Email Format <b>Both</b></p>	<p>7. The Privacy fields distinguish between different types of communication methods.</p> <p><b>Do not mail</b> corresponds to the dBase MAILING = FALSE.</p> <p>The Opt Out (unsubscribe) for bulk emails is recorded here.</p>
 <p>Demographics</p> <p>Gender <input type="radio"/> Female <input type="radio"/> Male <input type="radio"/> Transgender</p> <p>Date of Birth <input type="text"/></p> <p><input type="checkbox"/> Contact is deceased</p>	<p>8. We don't usually record Gender or Date of Birth data. The <b>Contact is deceased</b> 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>NSCS Member data</p> <p>Data captured only about members</p> <p>SATB <b>- none -</b></p> <p>Divisi <b>- none -</b></p> <p>Height <input type="radio"/> 4' 9" <input type="radio"/> 4' 10" <input type="radio"/> 4' 11" <input type="radio"/> 5' 0" <input type="radio"/> 5' 1" <input type="radio"/> 5' 2" <input type="radio"/> 5' 3" <input type="radio"/> 5' 4" <input type="radio"/> 5' 5" <input type="radio"/> 5' 6" <input type="radio"/> 5' 7" <input type="radio"/> 5' 8" <input type="radio"/> 5' 9" <input type="radio"/> 5' 10" <input type="radio"/> 5' 11" <input type="radio"/> 6' 0" <input type="radio"/> 6' 1" <input type="radio"/> 6' 2" <input type="radio"/> 6' 3" <input type="radio"/> 6' 4" <input type="radio"/> 6' 5"</p>	<p>9. <b>NSCS Member data</b> (far right tab on the <b>View Contact</b> screen) is used to enter voice part and height data.</p>

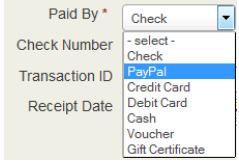
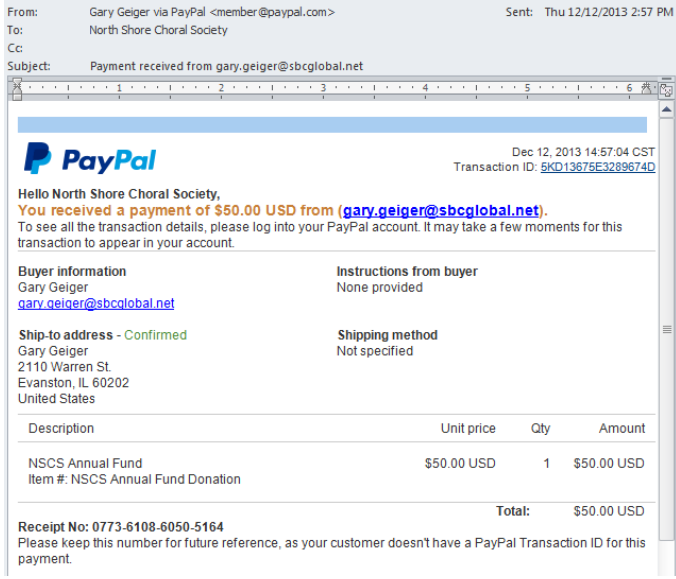

# North Shore Choral Society Job Procedures: Computer Services Coordinator

Illustrations: CiviCRM (Contributions)	Notes
<p><b>These illustrations assume you have been successful in logging in to the NSCS CRM Joomla! environment.</b></p>	
 <p>The screenshot shows the 'New Contribution' form in CiviCRM. At the top, there are three buttons: 'Save', 'Save and New', and 'Cancel'. Below them are four required fields: 'Contact *' (a dropdown menu), 'Financial Type *' (a search input field), 'Total Amount *' (a search input field with a dropdown for currency), and 'Source' (a text input field). A search dropdown is open for the 'Contact' field, showing options like 'New Individual', 'New Organization', and 'New Household'.</p>	<p><b>New Contribution</b></p> <p>1. To enter a contribution, start with <b>Contact</b> selection. If the search for an individual or organization is unsuccessful, you can enter minimal information to establish a new contact, and follow Contact Data Update instructions (see previous pages) to add data after the contribution is entered. An asterisk * identifies required fields. NOTE: For first-time contributors, please be sure to enter a <b>Donor Display Name</b> for the contact (in the <b>NSCS Patron Preferences</b> section).</p>
 <p>The screenshot shows the bottom section of the 'New Contribution' form. It includes fields for 'Campaign' (a dropdown menu), 'Contribution Status' (a dropdown menu), and a detailed view of the 'Financial Type *' dropdown menu. The dropdown menu is open, showing options: 'Corporate Gift', 'Donation', 'Donation via DAF', 'Event Fee', 'Grant', and 'Member Dues'. Arrows point from text labels to these options: 'used for contributions by individuals' points to 'Donation', 'used for ticket sales' points to 'Event Fee', 'will be used in the future?' points to 'Member Dues', 'used for contributions by organizations' points to 'Donation via DAF', and 'Contribution' points to 'Grant'.</p>	<p>2. After selecting or creating a contact, select the appropriate <b>Financial Type</b> (usually <i>Donation</i> for individual contributions) and enter the <b>Total Amount</b>.</p> <p>For <b>Source</b>, 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 <b>Source</b>. (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>

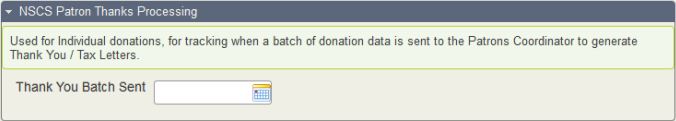
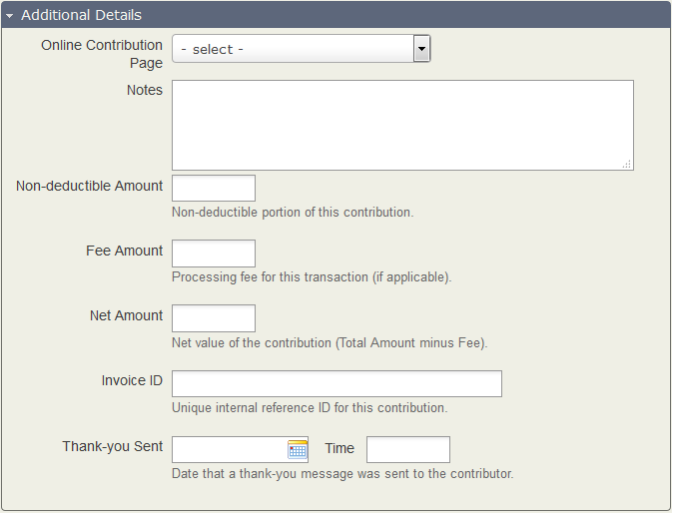
## North Shore Choral Society Job Procedures: Computer Services Coordinator

Illustrations: CiviCRM (Contributions)	Notes
 <p>Campaign <span>?</span> - select - 80th Season 2015-2016 (07/01/2015-06/30/2016) Contribution Status Matching Gift Program (07/01/2000)</p> <p>Contribution Status Completed</p>	<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 <b>Contribution Status</b> default to <i>Completed</i>.</p>
 <p>Soft Credit <span>?</span> Contact - none - Amount <input type="text"/> + another DCYAA (Donald Chen Young Artist Award)</p> <p>Soft Credit <span>?</span> Contact - none - + another gockel Gockel, Ruth Payment Ruth A. Gockel Memorial Fund</p> <p>Soft Credit <span>?</span> Contact - none - + another lar David Dynes Larson Memorial Gift Payment Larson, David Larson, Margaret Larson, Mary Lou</p>	<p>4. If all or a portion of a gift is to be allocated to a Designated Use Fund (<i>DCYAA</i>, <i>Larson</i>, or <i>Gockel</i>), use the <b>Soft Credit</b> 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 <b>Contact</b> search field and select it when it is displayed.</p> <p>Put the amount to be allocated to the fund in the <b>Amount</b> field. (You don't need to put in the dollar sign.) You can leave the Type field blank (<i>-none-</i>)</p> <p>A soft credit of the type <i>Household</i> is entered to credit an NSCS Board member when contributions are recorded as given by the spouse of the Board member. (This happens only if both are members.)</p>
 <p>From: Karen Rigotti &lt;rigottkl@gmail.com&gt; Sent: Tue 6/23/2015 4:55 PM To: john_darrow@sbcglobal.net; painefive@aol.com; rswarner@uic.edu; computerservices@northshorechoral.org Cc: Subject: Contribution Received</p>	<p>5. Within the <b>Payment Details</b> section, the <b>Received</b> date and <b>Time</b> fields should be the Sent date from the notification email.</p> <p><b>Paid By</b> 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 &lt;member@paypal.com&gt; 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: 5KID13675E3289674D</p> <p>Hello North Shore Choral Society,</p>	<p>6. Occasionally we receive donations via PayPal; in that case, <b>PayPal</b> should be selected as the <b>Paid By</b> value, and the <b>Transaction ID</b> copied from the PayPal email.</p>																
 <p>From: Gary Geiger via PayPal &lt;member@paypal.com&gt; 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: 5KID13675E3289674D</p> <p>Hello North Shore Choral Society,  <b>You received a payment of \$50.00 USD from (gary.geiger@sbcglobal.net).</b>          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="1"> <tr> <td><b>Buyer information</b> Gary Geiger gary.geiger@sbcglobal.net</td> <td><b>Instructions from buyer</b> None provided</td> </tr> <tr> <td><b>Ship-to address - Confirmed</b> Gary Geiger 2110 Warren St Evanston, IL 60202 United States</td> <td><b>Shipping method</b> 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"><b>Total:</b></td> <td><b>\$50.00 USD</b></td> </tr> </tbody> </table> <p><b>Receipt No: 0773-6108-6050-5164</b>          Please keep this number for future reference, as your customer doesn't have a PayPal Transaction ID for this payment.</p>	<b>Buyer information</b> Gary Geiger gary.geiger@sbcglobal.net	<b>Instructions from buyer</b> None provided	<b>Ship-to address - Confirmed</b> Gary Geiger 2110 Warren St Evanston, IL 60202 United States	<b>Shipping method</b> Not specified	Description	Unit price	Qty	Amount	NSCS Annual Fund Item #: NSCS Annual Fund Donation	\$50.00 USD	1	\$50.00 USD	<b>Total:</b>			<b>\$50.00 USD</b>	<p>7. For a PayPal transaction, there is sometimes a Receipt No.  <b>Receipt No: 1901-9949-7446-5702</b>          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 <b>Notes</b> field of the <b>Additional Details</b> tab.          (See #10 below.)</p>
<b>Buyer information</b> Gary Geiger gary.geiger@sbcglobal.net	<b>Instructions from buyer</b> None provided																
<b>Ship-to address - Confirmed</b> Gary Geiger 2110 Warren St Evanston, IL 60202 United States	<b>Shipping method</b> Not specified																
Description	Unit price	Qty	Amount														
NSCS Annual Fund Item #: NSCS Annual Fund Donation	\$50.00 USD	1	\$50.00 USD														
<b>Total:</b>			<b>\$50.00 USD</b>														
 <p>NSCS donation details</p> <p>Use the Financial Type "Donation via DAF" for gifts through Donor Advised Funds, naming the specific DAF in the Source field if that information is provided. Otherwise, the Source field should say how Computer Services was first informed of this contribution (usually Karen Rigotti email or John Darrow email, but sometimes PayPal). Use the Campaign of "Matching Gift Program" for both the individual's donation that will be matched and the corporation's match. Use the "Soft Credit" tab for fund designations (DCYAA, Larson, Gockel). On the "Payment Details" tab, the Received date and time should be the Sent date from the notification email.</p> <p>Select the date recorded on the face of the check.          Check Date: <input type="text"/></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>Enter the name of the honoree, or other free form text (e.g. "in thanksgiving for music")          Honoree text: <input type="text"/></p> <p>Is this donation to be anonymous? (If Yes, donation will be excluded from "by Category" aggregation for this donor in concert program booklets.)          Anonymous Donation: <input type="radio"/> Yes <input checked="" type="radio"/> No x</p> <p>Was the gift in the form of shares?          Gift of stock?: <input type="radio"/> Yes <input checked="" type="radio"/> No x</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 x</p> <p>Miscellaneous comments, e.g. matching gift corp, or sale of stock details          Other Comments: <input type="text"/></p>	<p>8. Other info specific to NSCS is entered in the <b>NSCS Donation Details</b> section. (There is some NSCS-specific Help text displayed at the beginning of this section.)          Although we don't record check number, we <u>do</u> record the date of the check, which is the date specified within notification emails.          Be sure to use <b>&amp;</b> instead of "and" in the <b>Honoree text</b> field when multiple people are honored.          (Patron &amp; Concert Program Booklet Coordinator request)</p>																

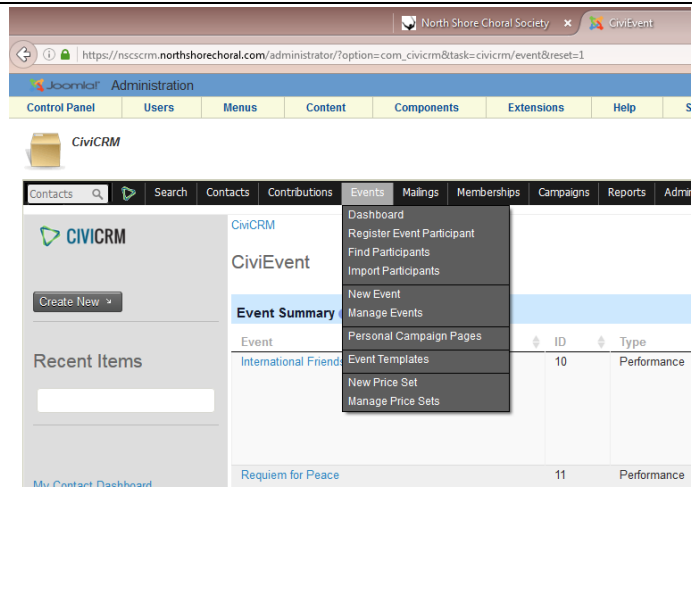
# North Shore Choral Society Job Procedures: Computer Services Coordinator

Illustrations: CiviCRM (Contributions)	Notes
	<p>9. The <b>NSCS Patrons Thanks Processing</b> tab is not updated when a contribution is received. The date recorded specifies when the batch containing this contribution was sent to the Patrons Coordinator. (This is the NSCS-specific version of the <b>Thank-you Sent Date</b> field in the <b>Additional Details</b> tab. It is usually updated via the “Batch Update for Contributions” action using the <i>NSCS Thank You Letter Batch Update</i> profile.)</p>
	<p>10. The <b>Additional Details</b> 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 (<b>1901-9949-7446-5702</b>) can be recorded in the <b>Notes</b> field of this section.</p>

# North Shore Choral Society Job Procedures: Computer Services Coordinator

Illustrations: CiviCRM (Ticket Sales)	Notes
---------------------------------------	-------

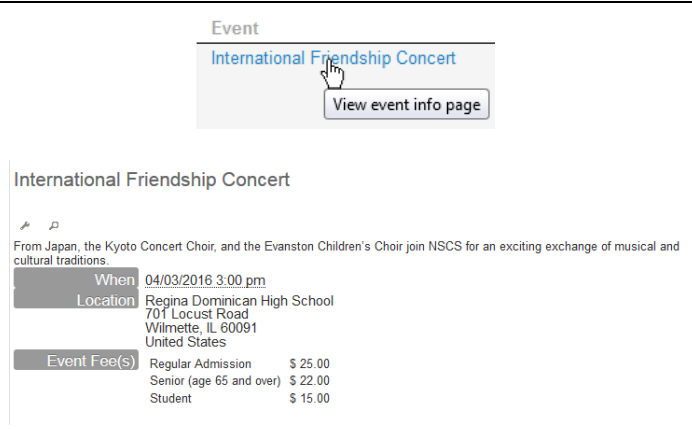
These illustrations assume you have been successful in logging in to the NSCSCRM Joomla! environment and are working in the CiviCRM component.



**Prerequisites**

A. A ticket purchase is related to an **Event**; purchases can be recorded via the “Register Event Participant” function in the Events menu. In addition to each concert, each NSCS season should be defined as an event, so that season ticket sales can be recorded.

To verify that appropriate Events have been created, review the **Dashboard** or the items listed on the **Manage Events** screen.



B. To verify that the event for which you want to record a ticket sale has been associated with a **Price Set** (which records types of tickets and their prices), view the **event info page** by clicking on the **Event** name. (The link is available on most screens where Event name is shown.)

## More Background Information

An **Event Participant** record is created:

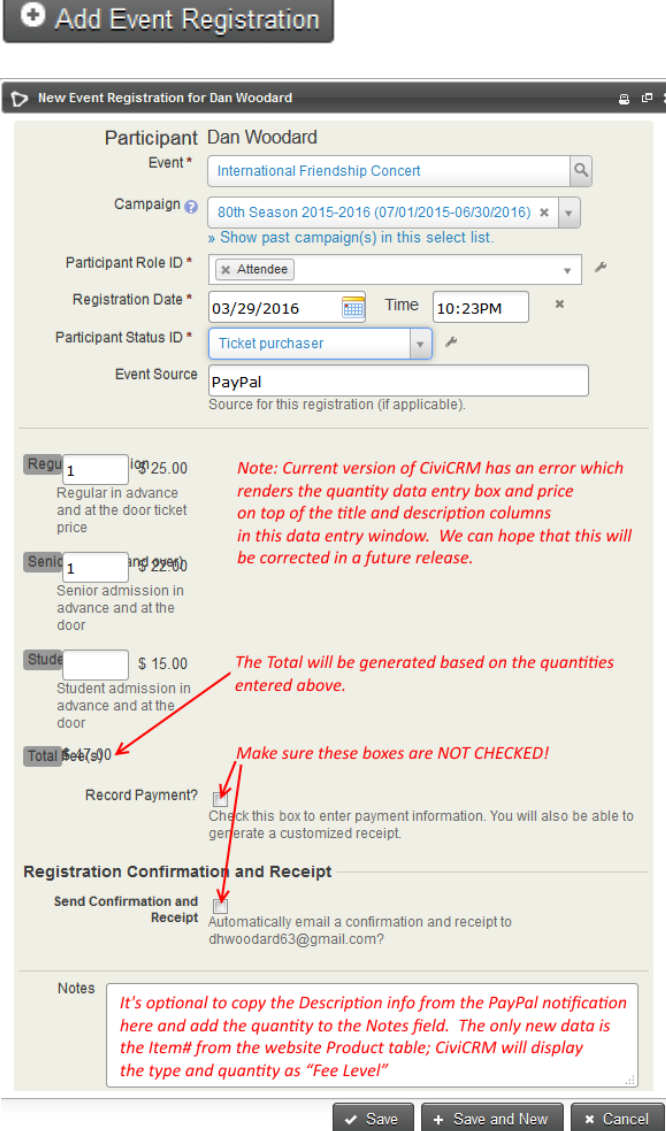
- a) On behalf of the Tickets Coordinator, to record the purchase of season or concert tickets by a Contact.

The Participant’s Role is **Attendee**.

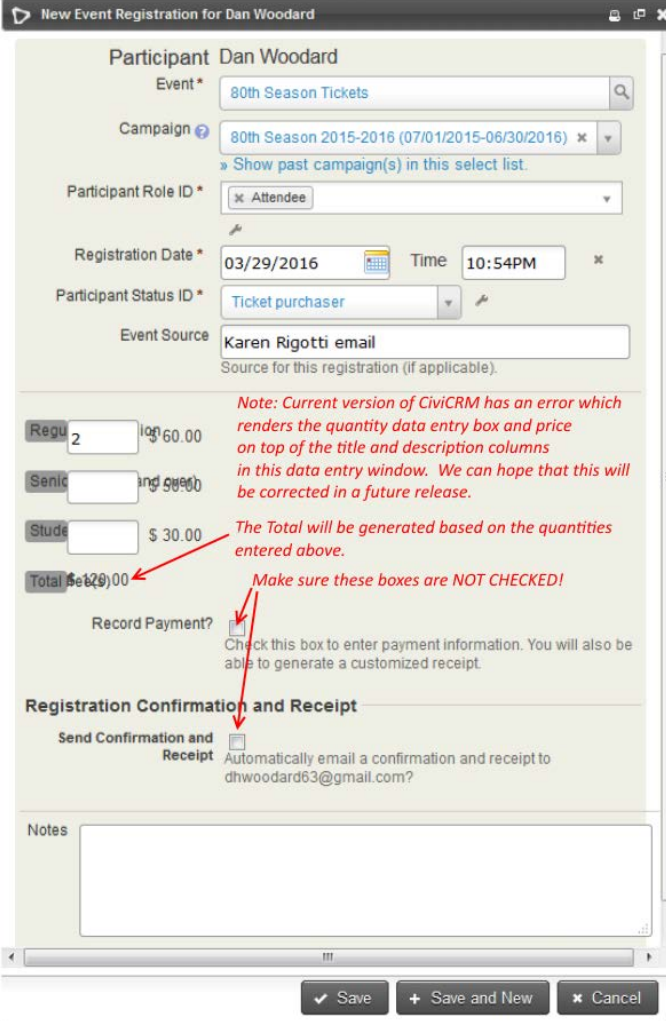
- b) On behalf of the Membership Coordinator, to register that an NSCS member will participate in a concert. The Participant’s Role is **Singer**. (An additional Role can be added for **Chamber Choir**. **Soloist**, **Instrumentalist** roles are also enabled, but these are all “uncounted” roles on the Dashboard. “Counted” reflects only Registered Singers.)

Status	Role
Ticket purchaser	Attendee
Registered	Singer, Chamber Choir

## North Shore Choral Society Job Procedures: Computer Services Coordinator

Illustrations: CiviCRM (Ticket Sales)	Notes
<p><b>Hint:</b> Because a ticket sale represents a transaction relating a <b>Contact</b> and an <b>Event</b>, data entry can be initiated either via a “View Contact” screen or the “Register Event Participant” function from the Events menu. If the purchaser is <i>not</i> a name you recognize, the “View Contact” screen is the better option. This allows you to check the street address and email to verify that the purchaser is already in the database (or to add the Contact), or to change the first name if another household member is now ordering tickets.</p>	
 <p><b>1. Ticket Purchase via PayPal</b></p> <ul style="list-style-type: none"> <li>• From the <b>View Contact</b> screen for the ticket purchaser, select the <b>Events</b> tab.</li> <li>• Select “Add Event Registration”</li> <li>• Select the <b>Event</b> (either the concert name or <i>NNth Season Tickets</i>). The associated <b>Campaign</b> (NSCS season) should automatically appear.</li> <li>• Allow the <b>Participant Role ID</b> to default to <b>Attendee</b>.</li> <li>• Enter the PayPal transaction date and time on the PayPal notification email as the <b>Registration Date</b> and <b>Time</b>.</li> <li>• Enter the <b>Participant Status ID</b> of <b>Ticket Purchaser</b>.</li> <li>• Enter the <b>Event Source</b> of <b>PayPal</b>.</li> <li>• Enter the number of tickets of each type purchased in the appropriate boxes. The <b>Total Fee(s)</b> should match the PayPal payment total.</li> <li>• Do <i>not</i> select the <b>Record Payment</b> or <b>Send Confirmation</b> boxes. Click <b>Save</b>.</li> </ul>	
<p>If you don't get a notification box that the registration has been saved, you may have neglected to enter a required (*) field.</p>	

## North Shore Choral Society Job Procedures: Computer Services Coordinator

Illustrations: CiviCRM (Ticket Sales)	Notes
 <p data-bbox="230 1270 782 1381">If you don't get a notification box that the registration has been saved, you may have neglected to enter a required (*) field.</p>	<p data-bbox="868 235 1286 319">2. <i>Ticket Purchase by check, notification via email</i></p> <ul data-bbox="868 325 1412 1711" style="list-style-type: none"> <li>• From the <b>View Contact</b> screen for the ticket purchaser, select the <b>Events</b> tab.</li> <li>• Select “Add Event Registration”</li> <li>• Select the <b>Event</b> (either the concert name or <i>NNth Season Tickets</i>). The associated <b>Campaign</b> (NSCS season) should automatically appear.</li> <li>• Allow the <b>Participant Role ID</b> to default to <i>Attendee</i>.</li> <li>• Enter the sent date and time on the email as the <b>Registration Date</b> and <b>Time</b>.</li> <li>• Enter the <b>Participant Status ID</b> of <i>Ticket Purchaser</i>.</li> <li>• Enter the <b>Event Source</b> of <i>[Name] email</i> (who sent the email).</li> <li>• If known, enter the number of tickets of each type purchased in the appropriate boxes. The <b>Total Fee(s)</b> should match the PayPal payment total. If the email does not specify the quantity/type of tickets, leave the boxes blank.</li> <li>• Do <i>not</i> select the <b>Record Payment</b> or <b>Send Confirmation</b> boxes. Click <b>Save</b>.</li> </ul>