
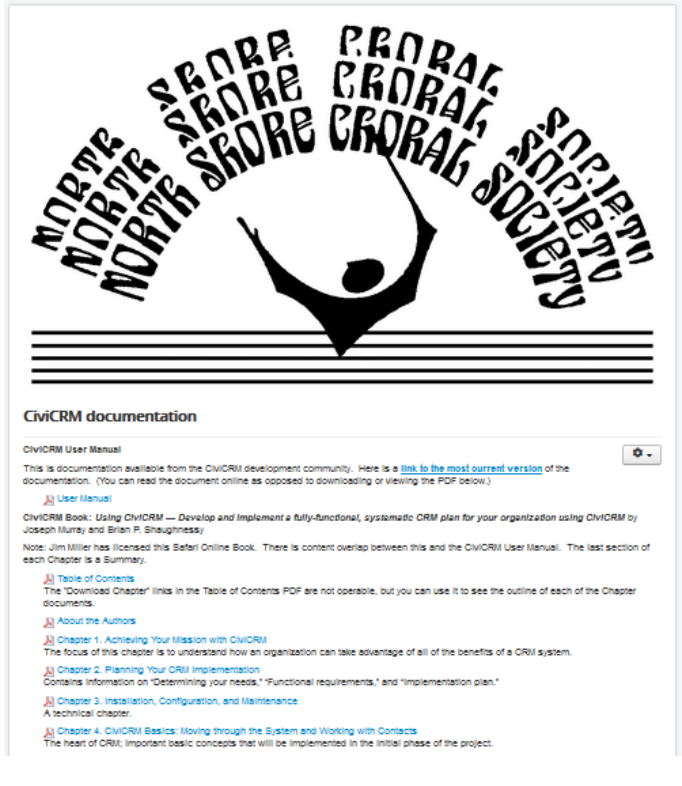

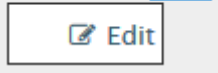
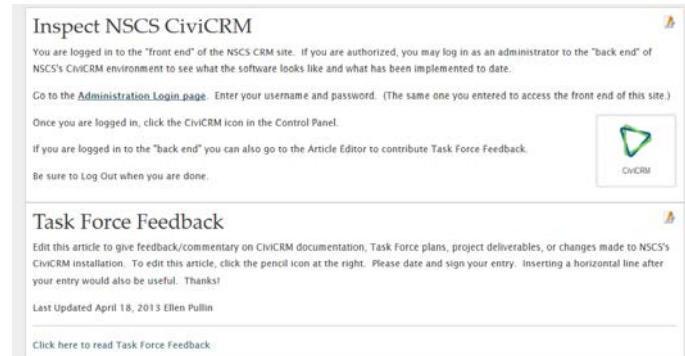




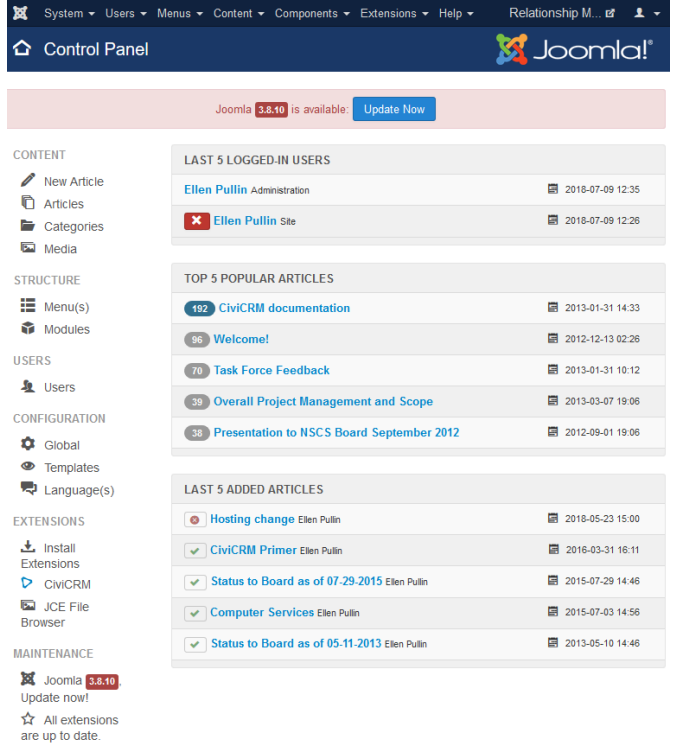
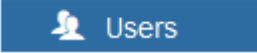
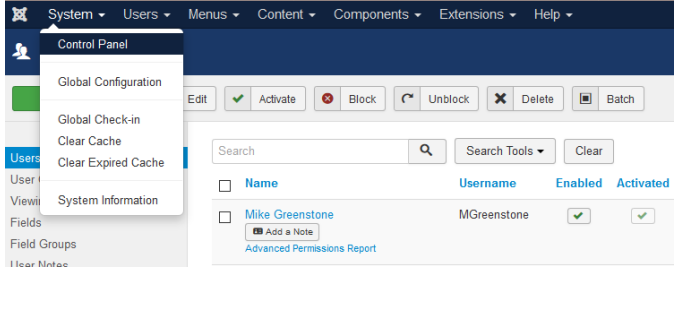
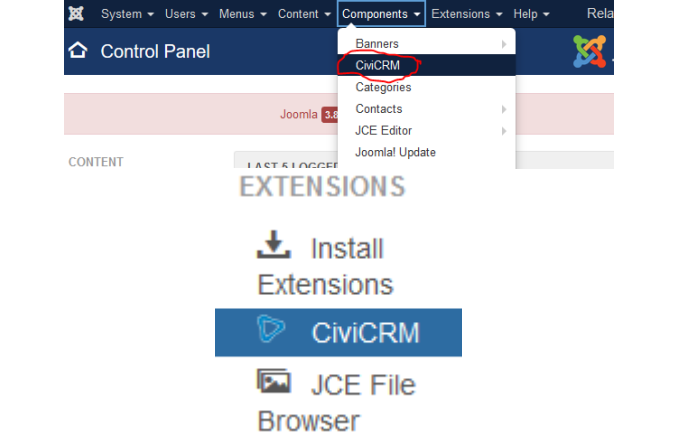
North Shore Choral Society Job Procedures: Computer Services Coordinator

Illustrations: Joomla! front end	Notes
<p>The NCSCRM Relationship Management website URL is https://nscscrm.northshorechoral.us/</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 NCSCRM Joomla! Relationship Management website.</p>	
	<p>2. This is the CiviCRM documentation page, which is what you see after a successful login. Click the NSCS Logo at the top of the page 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> <p>Note: The gear icon  on this or other pages means that your ID is authorized to update this “article” via the front end editor. </p>

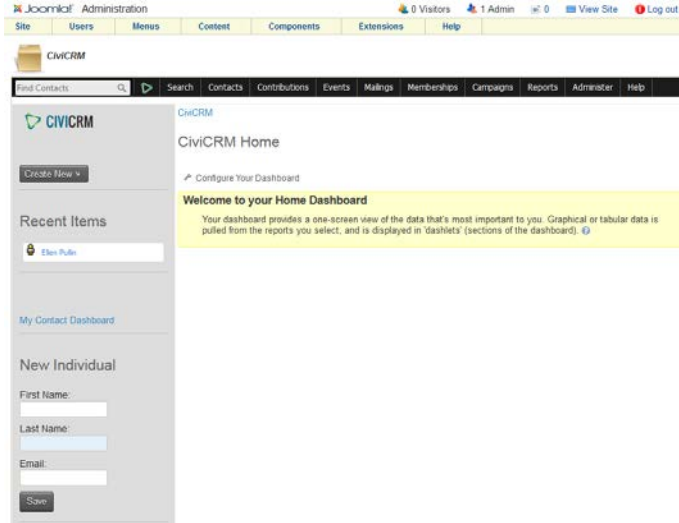
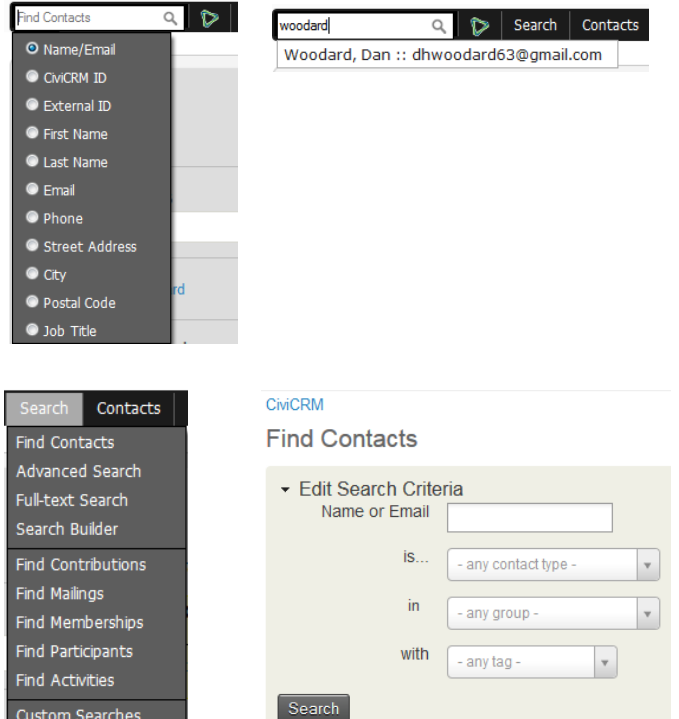
North Shore Choral Society Job Procedures: Computer Services Coordinator

Illustrations: Joomla! front end	Notes																								
 <p>Inspect NSCS CiviCRM</p> <p>You are logged in to the "front end" of the NSCS CRM site. If you are authorized, you may log in as an administrator to the "back end" of NSCS's CiviCRM environment to see what the software looks like and what has been implemented to date.</p> <p>Go to the Administration Login page. Enter your username and password. (The same one you entered to access the front end of this site.)</p> <p>Once you are logged in, click the CiviCRM icon in the Control Panel.</p> <p>If you are logged in to the "back end" you can also go to the Article Editor to contribute Task Force Feedback.</p> <p>Be sure to Log Out when you are done.</p> <p>Task Force Feedback</p> <p>Edit this article to give feedback/commentary on CiviCRM documentation, Task Force plans, project deliverables, or changes made to NSCS's CiviCRM installation. To edit this article, click the pencil icon at the right. Please date and sign your entry. Inserting a horizontal line after your entry would also be useful. Thanks!</p> <p>Last Updated April 18, 2013 Ellen Pullin</p> <p>Click here to read Task Force Feedback</p>	<p>3. This is the Task Force page.</p>																								
<table border="1"> <thead> <tr> <th>Title</th> <th>Author</th> <th>Hits</th> <th>Edit Article</th> </tr> </thead> <tbody> <tr> <td>Status to Board as of 07-29-2015</td> <td>Written by Ellen Pullin</td> <td>Hits: 1</td> <td>Edit</td> </tr> <tr> <td>Status to Board as of 05-11-2013</td> <td>Written by Renata Lowe and Ellen Pullin</td> <td>Hits: 21</td> <td>Edit</td> </tr> <tr> <td>Status to Board as of 04-13-2013</td> <td>Written by Ellen Pullin</td> <td>Hits: 20</td> <td>Edit</td> </tr> <tr> <td>Status to Board as of 03-09-2013</td> <td>Written by Ellen Pullin</td> <td>Hits: 35</td> <td>Edit</td> </tr> <tr> <td>Status to Board as of 02-09-2013</td> <td>Written by Ellen Pullin</td> <td>Hits: 2</td> <td>Edit</td> </tr> </tbody> </table> <p>New</p>	Title	Author	Hits	Edit Article	Status to Board as of 07-29-2015	Written by Ellen Pullin	Hits: 1	Edit	Status to Board as of 05-11-2013	Written by Renata Lowe and Ellen Pullin	Hits: 21	Edit	Status to Board as of 04-13-2013	Written by Ellen Pullin	Hits: 20	Edit	Status to Board as of 03-09-2013	Written by Ellen Pullin	Hits: 35	Edit	Status to Board as of 02-09-2013	Written by Ellen Pullin	Hits: 2	Edit	<p>4. This is the Status Report page.</p>
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Presentation to NSCS Board September 2012	Written by Ellen Pullin	Hits: 38	Edit																						
	<p>6. From the Task Force page, if you single-click the CiviCRM icon</p>  <p>to access the admin (back end) login page, you'll be presented with this login box.</p> <p>You can also access the admin site directly through this URL:</p> <p>https://nscscrm.northshorechoral.us/administrator/index.php</p>																								

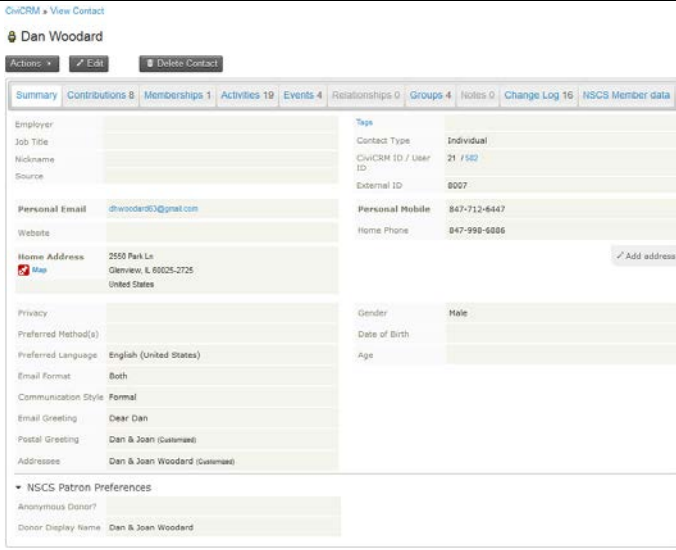
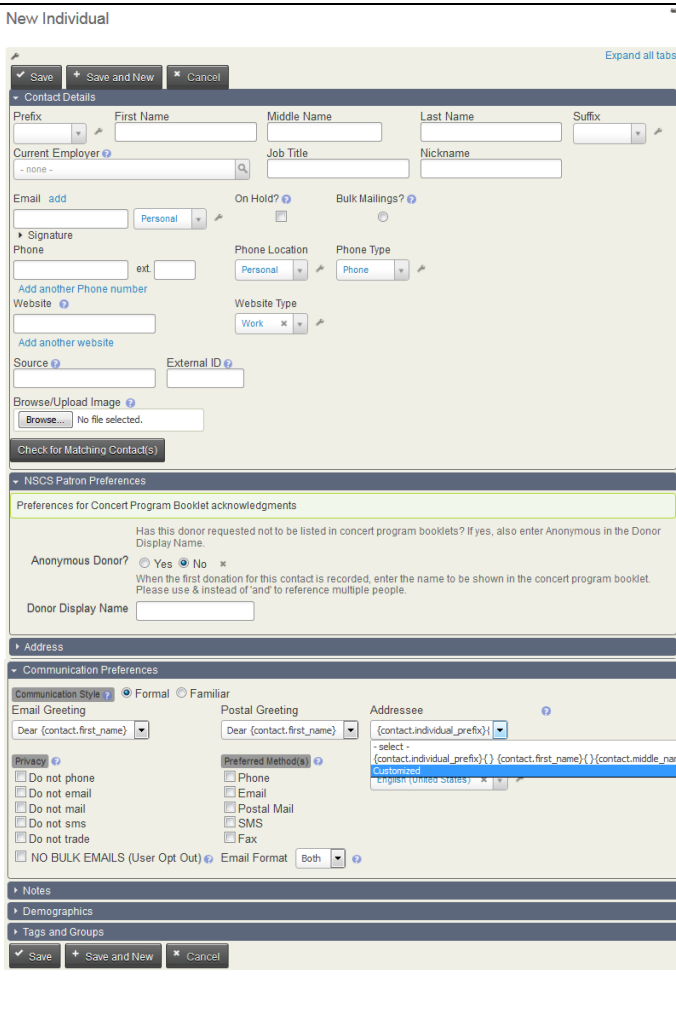
North Shore Choral Society Job Procedures: Computer Services Coordinator

Illustrations: Joomla! back end	Notes
<p>These illustrations assume you have been successful in logging in to the NSCSCR Relationship Management Joomla! administration environment. [https://nscscrm.northshorechoral.us/administrator/index.php]</p>	
 <p>The screenshot shows the Joomla! administrator interface. At the top, there's a navigation menu with 'System', 'Users', 'Menus', 'Content', 'Components', 'Extensions', and 'Help'. Below the menu is the 'Control Panel' header with the Joomla! logo. A notification bar indicates 'Joomla 3.8.10 is available' with an 'Update Now' button. The main area is divided into several sections: 'CONTENT' (New Article, Articles, Categories, Media), 'STRUCTURE' (Menu(s), Modules), 'USERS' (Users), 'CONFIGURATION' (Global, Templates, Language(s)), 'EXTENSIONS' (Install Extensions, CiviCRM, JCE File Browser), and 'MAINTENANCE' (Joomla 3.8.10 Update now!, All extensions are up to date.). On the right, there are three lists: 'LAST 5 LOGGED-IN USERS' (Ellen Pullin Administration, Ellen Pullin Site), 'TOP 5 POPULAR ARTICLES' (CiviCRM documentation, Welcome!, Task Force Feedback, Overall Project Management and Scope, Presentation to NSCS Board September 2012), and 'LAST 5 ADDED ARTICLES' (Hosting change, CiviCRM Primer, Status to Board as of 07-29-2015, Computer Services, Status to Board as of 05-11-2013).</p>	<p>1. This is the Joomla! Control Panel, which is the program which manages the NSCS Relationship Management website.</p> <p>USERS</p> <p> This link points to the User Manager, which is the component which manages access to the NSCS Relationship Management website.</p>
 <p>The screenshot shows the Joomla! User Manager interface. At the top, there's a navigation menu with 'System', 'Users', 'Menus', 'Content', 'Components', 'Extensions', and 'Help'. Below the menu is the 'Control Panel' header with the Joomla! logo. A dropdown menu is open under 'System', showing options: 'Global Configuration', 'Global Check-in', 'Clear Cache', 'Clear Expired Cache', 'Users', 'User', 'View', 'System Information', 'Fields', 'Field Groups', and 'Clear Notice'. The main area shows a table of users with columns for 'Name', 'Username', 'Enabled', and 'Activated'. The first user listed is 'Mike Greenstone' with username 'MGreenstone'. There are buttons for 'Edit', 'Activate', 'Block', 'Unblock', 'Delete', and 'Batch'. A search bar and 'Search Tools' are also visible.</p>	<p>2. The User Manager allows you to update your own profile (Name, Login Name, Password, Email).</p> <p>Click the first item in the System menu to return to the Control Panel.</p>
 <p>The screenshot shows the Joomla! administrator interface with the 'Components' menu open. The 'CiviCRM' option is highlighted with a red circle. Other options in the menu include 'Banners', 'Categories', 'Contacts', 'JCE Editor', and 'Joomla! Update'. Below the menu, there's a notification bar for Joomla! 3.8.10. The main area shows the 'EXTENSIONS' section with buttons for 'Install Extensions', 'CiviCRM', and 'JCE File Browser'.</p>	<p>3. Back on the Control Panel, you can access CiviCRM either by the link in the components menu</p> <p>Or by the link under Extensions in the left hand column.</p> <p>Single-click to access CiviCRM.</p>

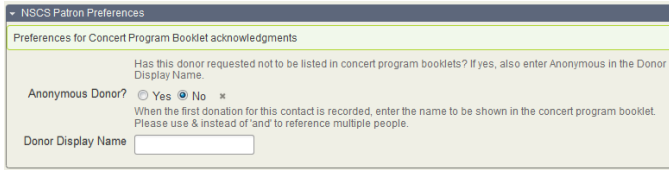
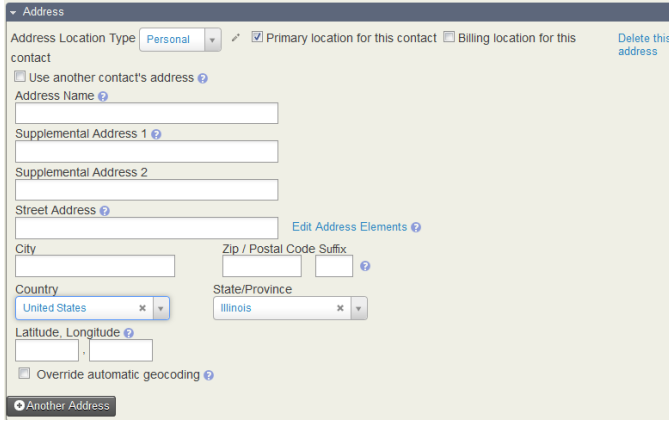
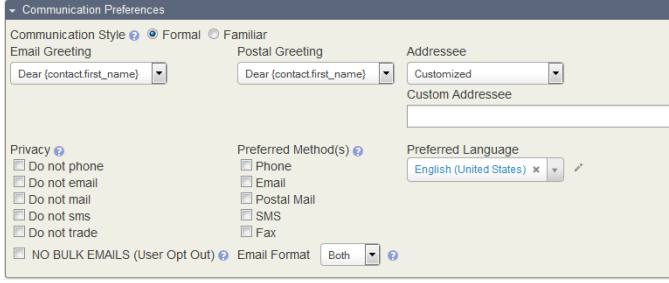
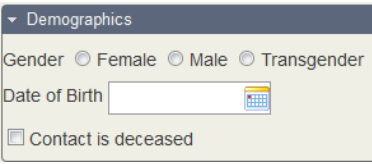
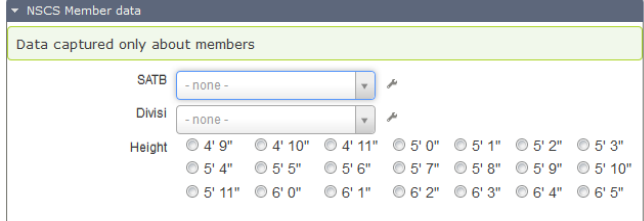
North Shore Choral Society Job Procedures: Computer Services Coordinator

Illustrations: CiviCRM (Contacts)	Notes
<p>These illustrations assume you have been successful in logging in to the CiviCRM extension within the Joomla! environment.</p>	
	<p>1. This is the CiviCRM Home page.</p> <p>Note: You can use the link to configure your own Dashboard. It might be useful to include a Contribution report and an Events report that shows Concert Tickets Purchased. That way you can quickly verify the latest entries.</p>
	<p>Contact Searches</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>

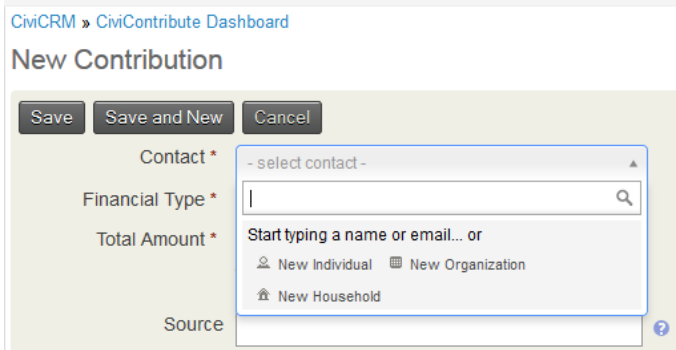
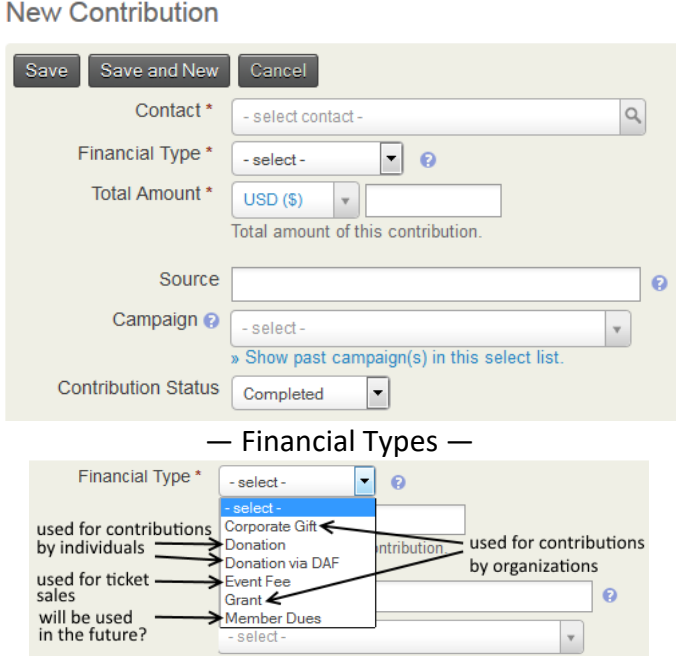
North Shore Choral Society Job Procedures: Computer Services Coordinator

Illustrations: CiviCRM (Contacts)	Notes
	<p>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 Member data tab has data only captured for members. The External ID field is the NSCS dBase ID (pre-CiviCRM).</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 to be used for addressing envelopes. 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>

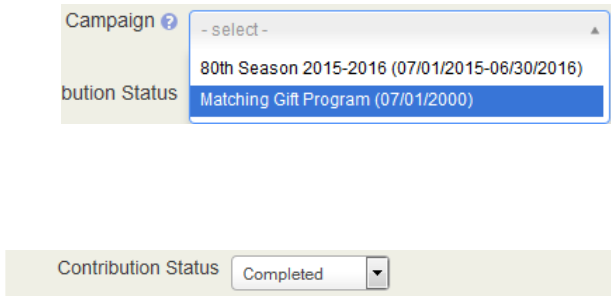
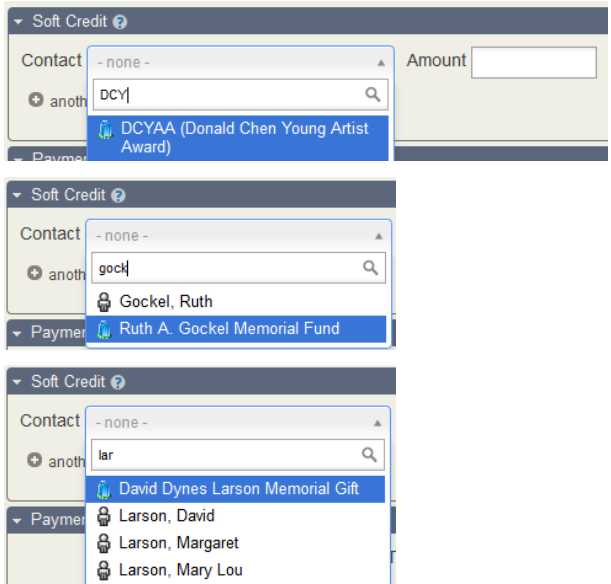

North Shore Choral Society Job Procedures: Computer Services Coordinator

Illustrations: CiviCRM (Contacts)	Notes
 <p>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 & instead of 'and' to reference multiple people.</p> <p>Donor Display Name <input type="text"/></p>	<p>5. Use the Patron Preferences section used to enter preferences the first time a contribution is received from a contact.</p>
 <p>Address</p> <p>Address Location Type Personal <input checked="" type="checkbox"/> Primary location for this contact <input type="checkbox"/> Billing location for this contact Delete this address</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"/> Edit Address Elements</p> <p>City <input type="text"/> Zip / Postal Code Suffix <input type="text"/></p> <p>Country United States State/Province Illinois</p> <p>Latitude, Longitude <input type="text"/></p> <p><input type="checkbox"/> Override automatic geocoding</p> <p>Another Address</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>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.</p>
 <p>Communication Preferences</p> <p>Communication Style <input checked="" type="radio"/> Formal <input type="radio"/> Familiar</p> <p>Email Greeting Dear {contact_first_name} Postal Greeting Dear {contact_first_name} Addressee Customized</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 English (United States)</p> <p><input type="checkbox"/> NO BULK EMAILS (User Opt Out) Email Format Both</p>	<p>7. The Privacy fields distinguish between different types of communication methods.</p> <p>Do not mail 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 Contact is deceased 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 - none -</p> <p>Divisi - none -</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. NSCS Member data (far right tab on the View Contact screen) is used to enter voice part and height data.</p>

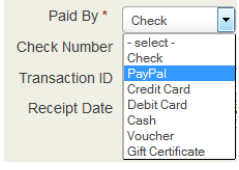
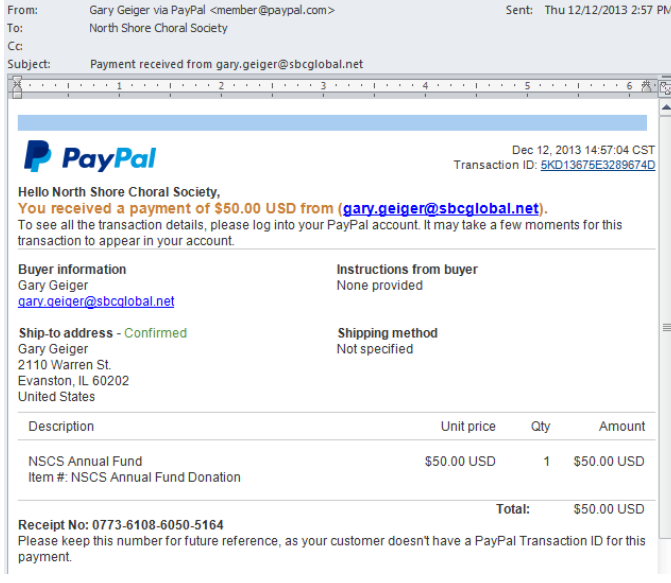
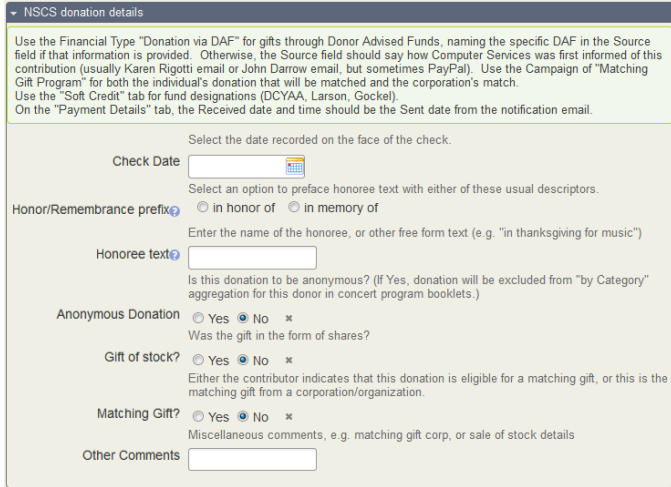
North Shore Choral Society Job Procedures: Computer Services Coordinator

Illustrations: CiviCRM (Contributions)	Notes
<p>These illustrations assume you have been successful in logging in to the NSCS CRM Joomla! environment.</p>	
 <p>CiviCRM » CiviContribute Dashboard New Contribution</p> <p>Save Save and New Cancel</p> <p>Contact * -- select contact -</p> <p>Financial Type * </p> <p>Total Amount * Start typing a name or email... or New Individual New Organization New Household</p> <p>Source</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 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 Donor Display Name for the contact (in the NSCS Patron Preferences section).</p>
 <p>New Contribution</p> <p>Save Save and New Cancel</p> <p>Contact * - select contact -</p> <p>Financial Type * - select -</p> <p>Total Amount * USD (\$) <input type="text"/> Total amount of this contribution.</p> <p>Source <input type="text"/></p> <p>Campaign ? - select - » Show past campaign(s) in this select list.</p> <p>Contribution Status Completed</p> <p>— Financial Types —</p> <p>Financial Type * - select -</p> <p>used for contributions by individuals → Corporate Gift</p> <p>used for ticket sales → Donation via DAF</p> <p>will be used in the future? → Member Dues</p> <p>Grant ← used for contributions by organizations</p>	<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>

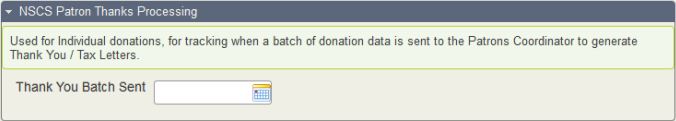
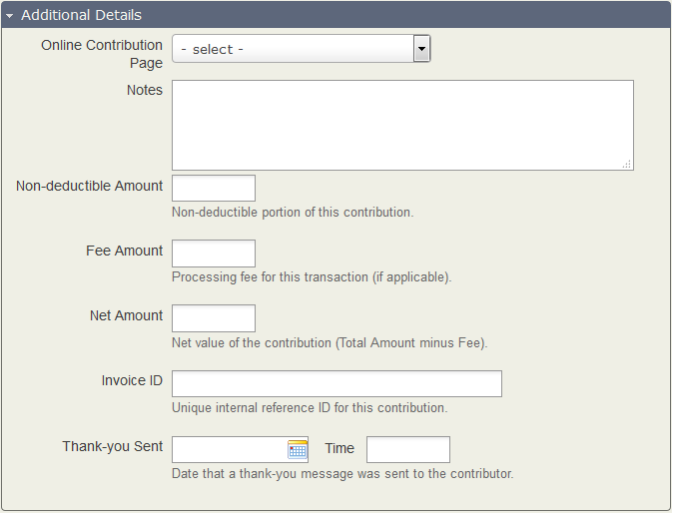
North Shore Choral Society Job Procedures: Computer Services Coordinator

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</i>, <i>Larson</i>, or <i>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>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>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: 5KID13675E3289674D</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: 5KID13675E3289674D</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="1"> <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">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 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 NSCS Donation Details 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 & instead of "and" in the Honoree text field when multiple people are honored. (Patron & Concert Program Booklet Coordinator request)</p>																

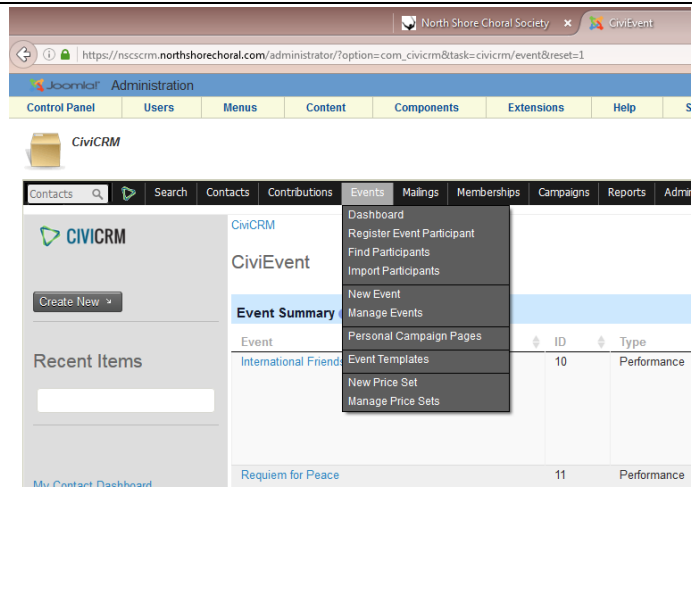
North Shore Choral Society Job Procedures: Computer Services Coordinator

Illustrations: CiviCRM (Contributions)	Notes
	<p>9. The NSCS Patrons Thanks Processing 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 Thank-you Sent Date field in the Additional Details 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 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>

North Shore Choral Society Job Procedures: Computer Services Coordinator

Illustrations: CiviCRM (Ticket Sales)	Notes
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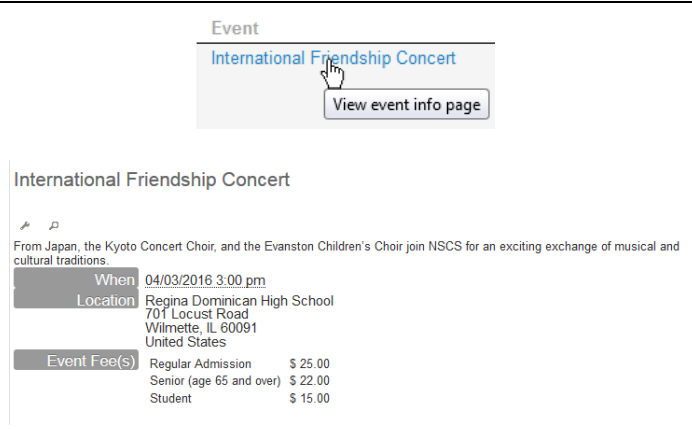
These illustrations assume you have been successful in logging in to the NSCS CRM Joomla! environment and are working in the CiviCRM component.



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.)

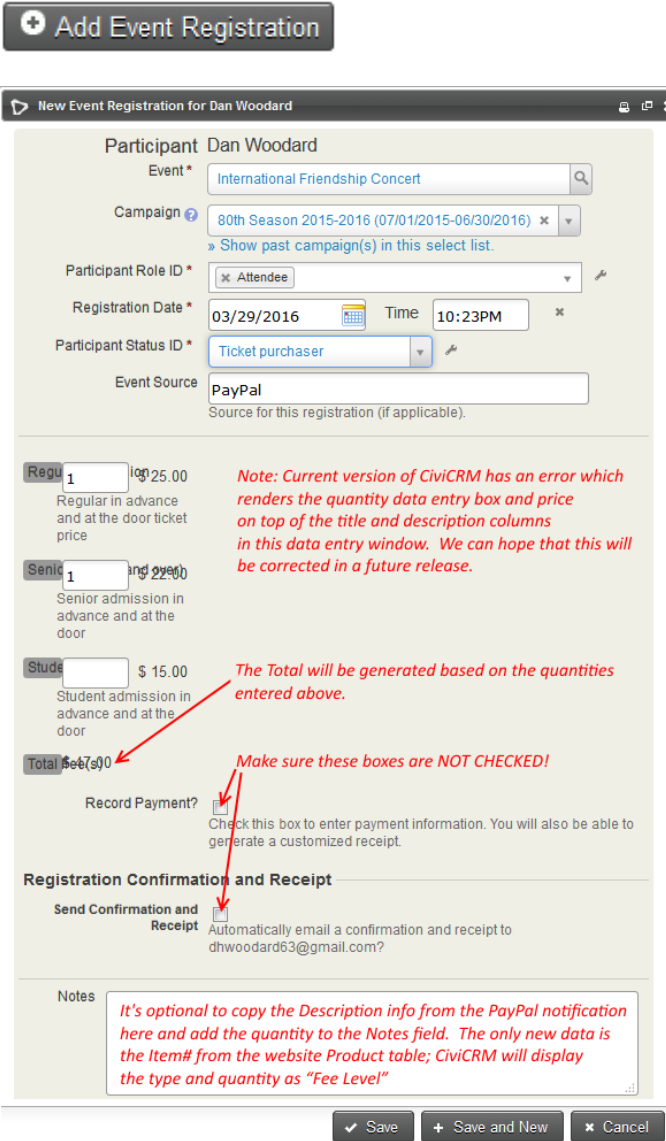
More Background Information

An **Event Participant** record is created:

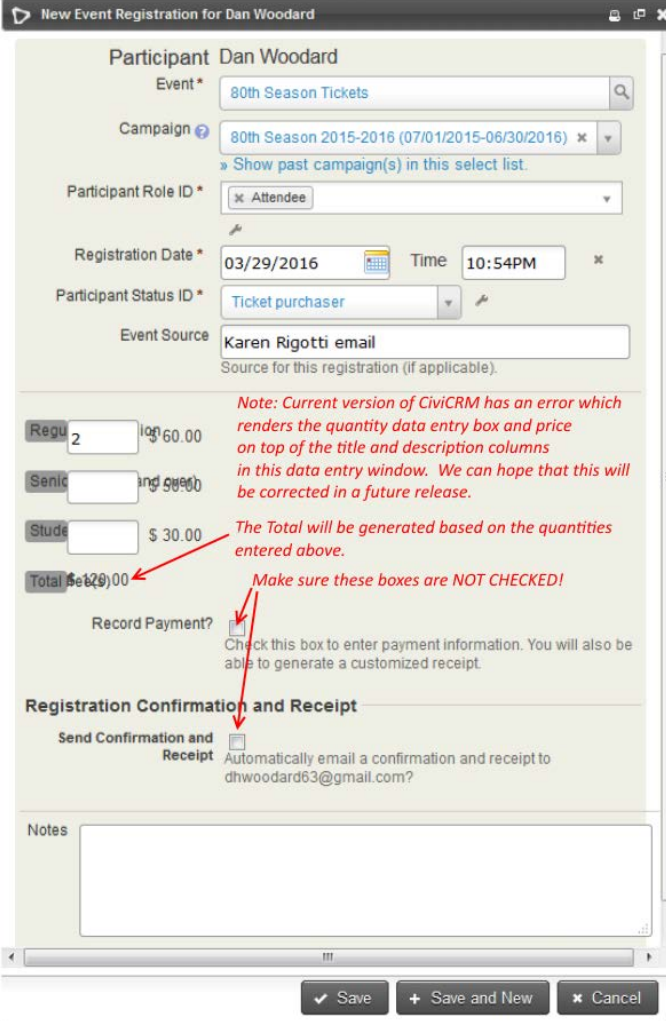
- a) On behalf of the Tickets Coordinator, to record the purchase of season or concert tickets by a Contact. The Participant’s Role is **Attendee**.
- b) On behalf of the Membership Coordinator, to register that an NSCS member will participate in a concert. The Participant’s Role is **Singer**. (An additional 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>Hint: Because a ticket sale represents a transaction relating a Contact and an Event, 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>1. Ticket Purchase via PayPal</p> <ul style="list-style-type: none"> • From the View Contact screen for the ticket purchaser, select the Events tab. • Select “Add Event Registration” • Select the Event (either the concert name or <i>NNth Season Tickets</i>). The associated Campaign (NSCS season) should automatically appear. • Allow the Participant Role ID to default to Attendee. • Enter the PayPal transaction date and time on the PayPal notification email as the Registration Date and Time. • Enter the Participant Status ID of Ticket Purchaser. • Enter the Event Source of PayPal. • Enter the number of tickets of each type purchased in the appropriate boxes. The Total Fee(s) should match the PayPal payment total. • Do <i>not</i> select the Record Payment or Send Confirmation boxes. Click Save. 	
<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"> • From the View Contact screen for the ticket purchaser, select the Events tab. • Select “Add Event Registration” • Select the Event (either the concert name or <i>NNth Season Tickets</i>). The associated Campaign (NSCS season) should automatically appear. • Allow the Participant Role ID to default to <i>Attendee</i>. • Enter the sent date and time on the email as the Registration Date and Time. • Enter the Participant Status ID of <i>Ticket Purchaser</i>. • Enter the Event Source of <i>[Name] email</i> (who sent the email). • If known, enter the number of tickets of each type purchased in the appropriate boxes. The Total Fee(s) should match the PayPal payment total. If the email does not specify the quantity/type of tickets, leave the boxes blank. • Do <i>not</i> select the Record Payment or Send Confirmation boxes. Click Save.