GMCVO Databases

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User Network Day, 12th July 2018

FIFA WORLD CUP RUSSIA 2018

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Timetable

- 09.45 Welcome
- 10.00 Deduping and merging
- 10.30 Communications and reminders
- 11.15 Break / User Clinic
- 11.45 The Wonder of Webforms
- 12.30 Lunch / User Clinic
- 13.00 Finish

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Deduping and merging

Craig Almond / Technical Support Assistant

CIVICRM

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Duplicates Happen

- User error
- Online sign up
- Contained in batch import

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Dedupe Features

- New contacts checked when added
- Online forms and event forms match details with existing contacts
- Contacts matched during import
- Merge contacts from search results
- Scan database for duplicates using a selected rule and merge duplicates as needed

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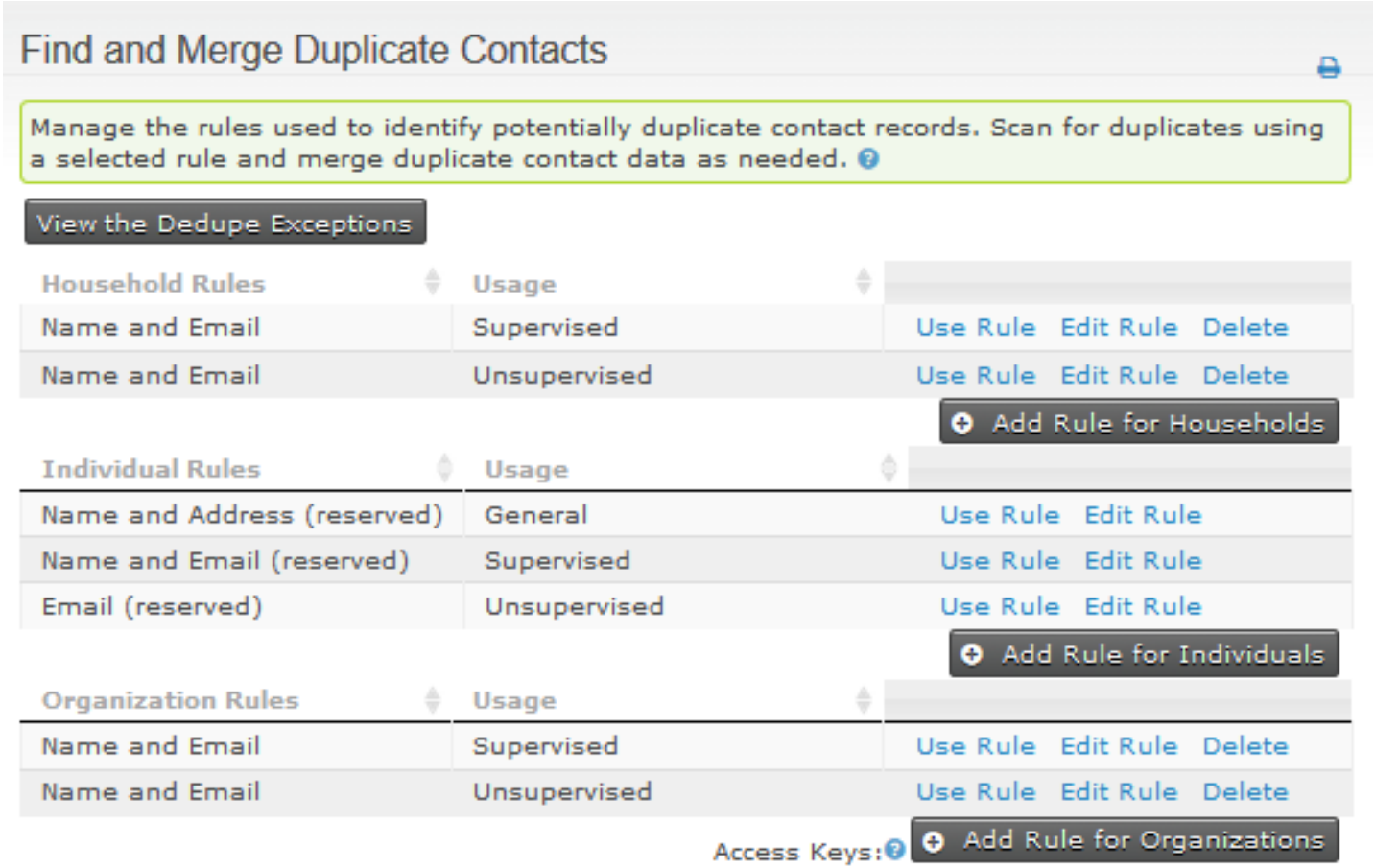
Managing Duplicates

Contacts> Find and Merge Duplicates



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Finding Duplicates

Supervised rules operate when contacts are added by site users. Matching contacts are flagged to the user

Unsupervised rules are used by event pages, contribution pages and other online forms to match contact records automatically

General configure additional 'General' rules with different criteria to scan for matches.

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Create a rule

Field	Length	Weight
First Name		1
Last Name		1
Email		1
- none -		
- none -		
Weight Threshold to Consider Contacts 'Matching':		2

Matches up to 5 core contact fields

Weight is scored when fields match

If total weight exceeds threshold contact is considered a duplicate

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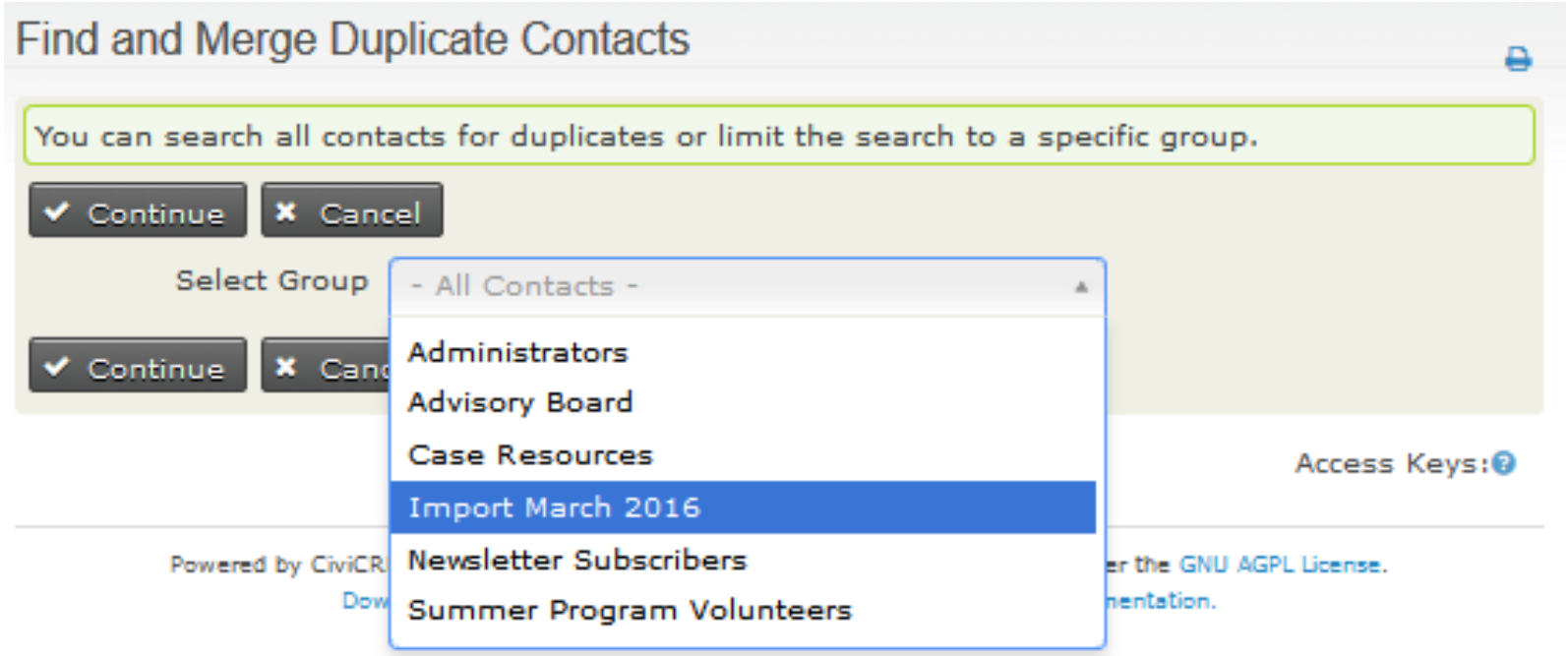
Use rule

Select to deduplicate a specific contact group, or to run rule against all contacts



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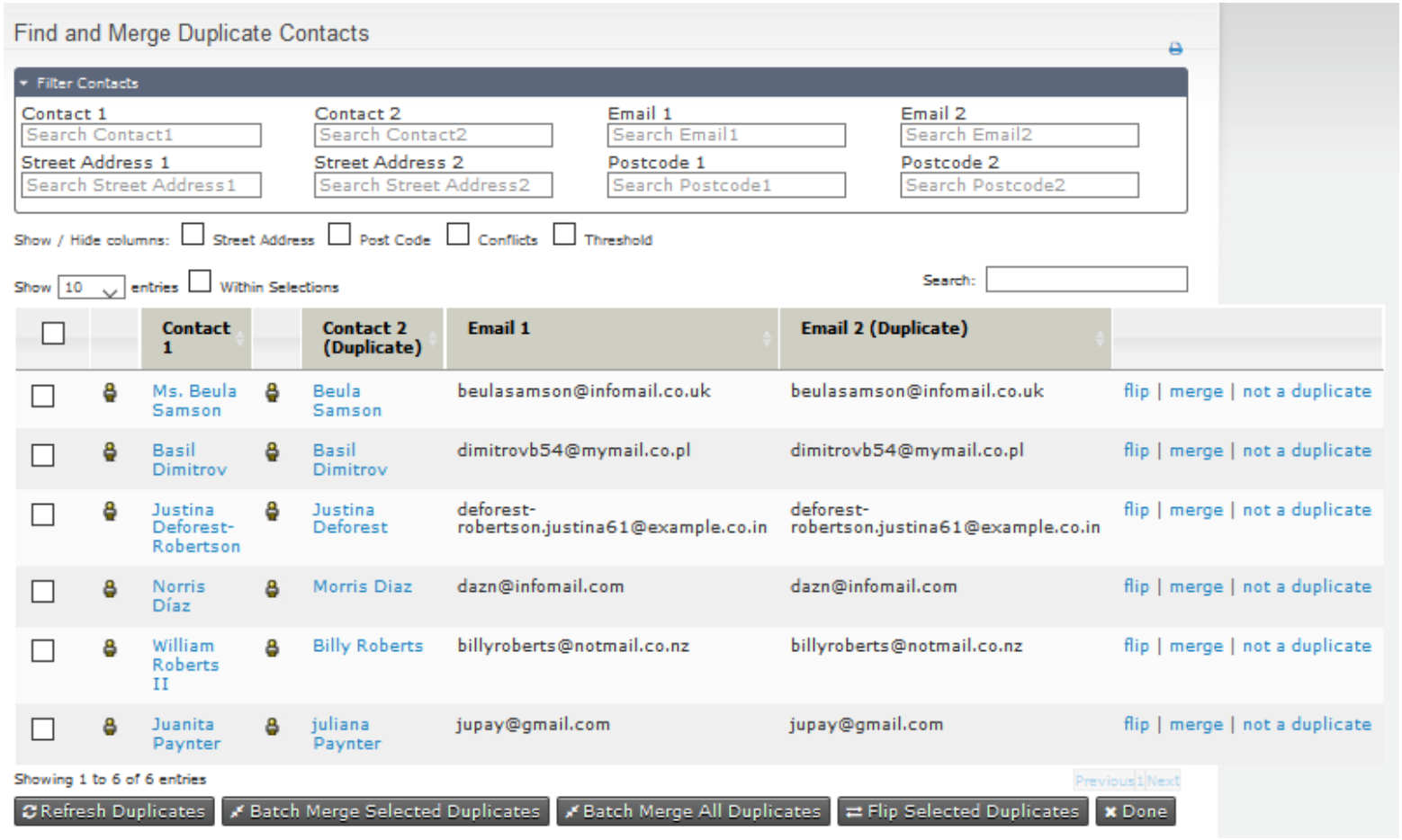
Duplicate list



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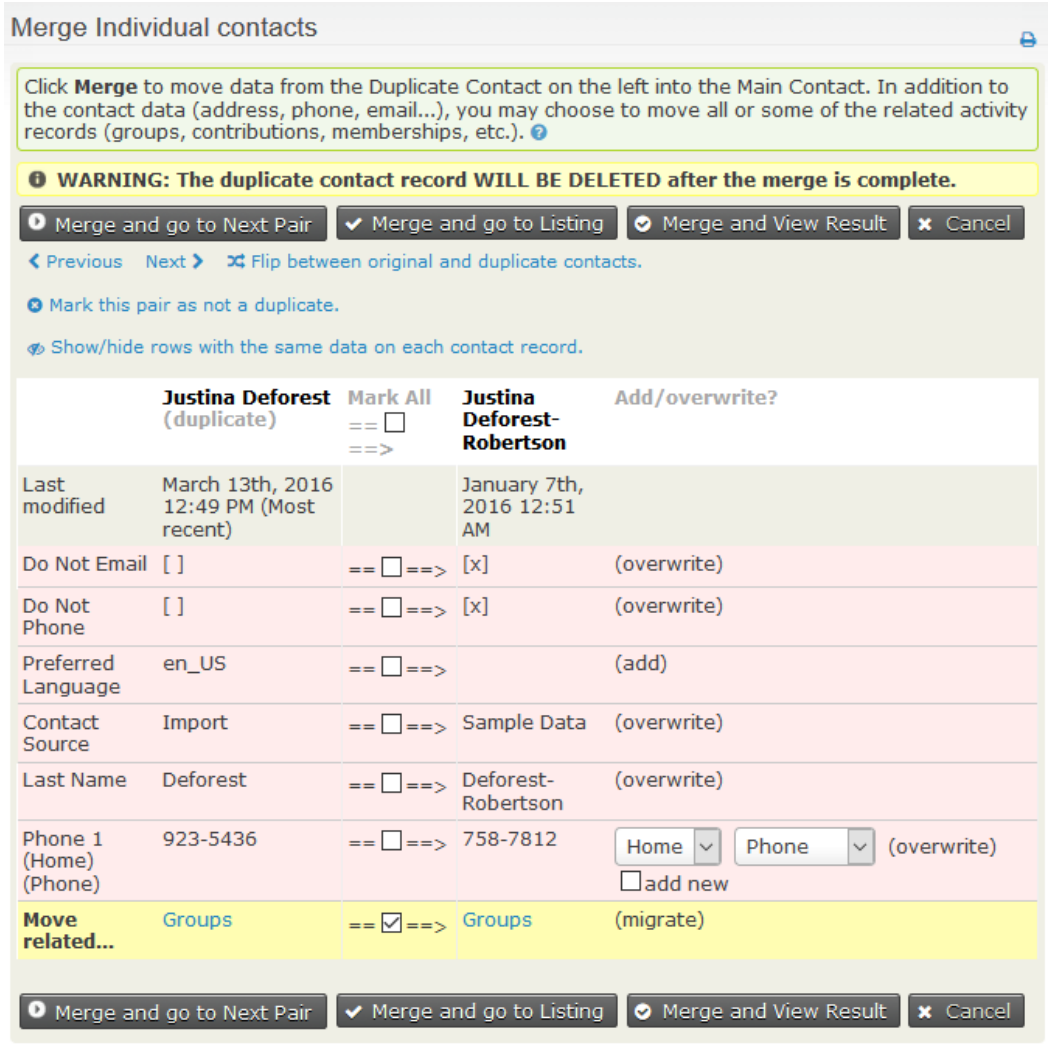
Click to inspect



Merge Individual contacts

Click **Merge** to move data from the Duplicate Contact on the left into the Main Contact. In addition to the contact data (address, phone, email...), you may choose to move all or some of the related activity records (groups, contributions, memberships, etc.).

WARNING: The duplicate contact record WILL BE DELETED after the merge is complete.

Merge and go to Next Pair | Merge and go to Listing | Merge and View Result | Cancel

Previous Next Flip between original and duplicate contacts.

Mark this pair as not a duplicate.

Show/hide rows with the same data on each contact record.

	Justina Deforest (duplicate)	Mark All == ☐ ==>	**Justina Deforest-Robertson**	Add/overwrite?
Last modified	March 13th, 2016 12:49 PM (Most recent)		January 7th, 2016 12:51 AM	
Do Not Email	[ ]	== ☐ ==>	[x]	(overwrite)
Do Not Phone	[ ]	== ☐ ==>	[x]	(overwrite)
Preferred Language	en_US	== ☐ ==>		(add)
Contact Source	Import	== ☐ ==>	Sample Data	(overwrite)
Last Name	Deforest	== ☐ ==>	Deforest-Robertson	(overwrite)
Phone 1 (Home) (Phone)	923-5436	== ☐ ==>	758-7812	Home Phone (overwrite) ☐ add new
Move related...	Groups	== ☑ ==>	Groups	(migrate)

Merge and go to Next Pair | Merge and go to Listing | Merge and View Result | Cancel

Let’s hunt and merge

Billy Ray Cyrus

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Communications and reminders: CiviMail, SMS and automation

Jon-man Cheung / Manager

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How can you communicate?

- Send an email
- Print a letter
- CiviMail
- SMS
- Scheduled reminders

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Send an email (from CiviCRM)

- Simple - Just use the action menu
- Recorded as an activity

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Print a letter / document

- From the action menu

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CiviMail

- Subscription to public lists
- Unsubscribe
- Opt out (of all bulk mailings)
- Tracking
  - Opens
  - Click-throughs

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SMS

- Send an SMS

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Scheduled reminders

- An automatic message (email or SMS) sent in relation to another module in CiviCRM
  - Activity
  - CiviEvent
  - CiviMember
  - CiviContribute

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The wonder of webforms!

Sarah Farrell-Graham / Technical Support

Shohidul Islam / Web developer

Mike Chaplin / Web developer

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Why we use webforms?

http://civiteacher.com/video/introducing-civicrm-drupal-webform-integration

https://demo.gmcvodatabases.org.uk/node/24/webform

- Easy to create and edit
- Manage and collect information
- Get rid of paper forms
- Embed online forms on to your website
- Send your webform in an email as a URL link- Using a check sum link

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What benefits do they have?

- Email confirmation of form completion- Can be to multiple persons
- Results can be exported- as CSV, or as a chart using pivot table extension
- Logged in/ Logged out users have different views- authorised users can see more than none authorised.
- Confirmation page in form settings; for thank you message, or direct to another form, or relevant information for that client.

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CiviCRM integration

- It creates the contacts in civi when the details are collected.
- Use conditional's to hide fields irrelevant to certain clients.
- Validation allows for required information to be collected- Date of birth/NHS number etc.

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The wonder of webforms!

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The wonder of webforms- Intermediate

So far we've learnt that you have these amazing Webforms that eliminate your stacked up paper forms and help you gather data that can be easily integrated into CiviCRM.

It can be emailed to the creator of the form and you can make better reports based on the data collected.

That’s very useful.

Right?

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But what if I told you
that you can use this form to create
something more advanced using numbers?

1+2+3+4+5+6+7+8+9

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How useful will it be if you could have a form that calculates each text field and gives you a sum?
Then with that sum, you can output something else?

For example. A point based questionnaire form that is attached to a **conditional statement** like a button which allows you choose a different page based on **how many points** you scored.

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Say ‘Hello’ to…

Webform Calculator

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Before introducing you to this powerful module:

You need the Webform Module and Webform Calculator Module installed for this to work properly.

A conditional statement is where an event is triggered based on action.

Example:
A button which takes you to another page is shown if you have over 10 points.

Another button is shown if you have less than 10 points.

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Webforms Calculator

As you know, you can setup different input types such as text field, checkbox, radio and select box. I'm going to setup the form with a **radio button** component.

Do you smoke?

- Yes (1 point)
  No (0 point)

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Webforms Calculator

We have a set of multiple choice questions.

Do you drink alcohol?

- Yes (2 point)
  No (0 point)

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Webforms Calculator

The webform is adding up the points in the background

Do you find it difficult to socialise?

- Yes (3 point)
  No (0 point)

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Webforms Calculator

The Webform sums up the points and based on what point it is, you can set off a message and page redirect button.

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Webforms Calculator

You scored **6** points…

We believe our care and support service will be useful to you

register with our service

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Webforms Calculator

You scored **3** points…

We believe our services related to maintaining your health will be useful to you

register with our service

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Webforms Calculator

How does this data collected work with CiviCRM?

This webform submission links to an *activity* or *case* of the contact / logged in user filling out this form.

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Webforms Calculator

LIVE EXAMPLE

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The wonder of webforms!

Sarah Farrell-Graham / Technical Support

Shohidul Islam / Web developer

Mike Chaplin / Web developer

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Using webforms for volunteer registration

…and a few other modules too…!

Mike Chaplin

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Typical workflow

- Volunteer searches for an opportunity
- Completes a user creation form
- May have to log in
- Completes a second form to register as a volunteer
- Has to find the opportunity again
- Applies for opportunity (3rd form)
- Workflow is a bit ‘clunky’ – bad UX

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Walk through the process

- https://demo.gmcvodatabases.org.uk/search-opps
- https://demo.gmcvodatabases.org.uk/user/register
- https://demo.gmcvodatabases.org.uk/vol-reg-v1
- **https://demo.gmcvodatabases.org.uk/vol-apply**

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How to streamline the workflow

- Remove the Drupal user registration form
- Create the Drupal user silently with the *Rules* module
- Remember the opportunity and go back to it

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Module requirements

- For basic recipe need:
- Rules
- Rules UI
- CiviCRM Entity

- For advanced features need also:
- Token Filter (advanced users only)
- PHP filter (development work)

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What is the Rules module?

- Something happens in Drupal – an '*Event*'
- If certain *Conditions* are true, then….
- Perform some *Actions*

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A common example of Rules

- Event: A user logged in
- Condition: The user has the ‘Admin’ role
- Action: Redirect user to an Admin page

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How we use Rules in this case

- Volunteer registration form now creates a CiviCRM contact AND a tag
- Event:
  - A Tag was created
- Conditions:
  - The Tag was created for a Contact
  - The Tag was the type created by our webform
  - A Drupal user doesn't already exist for our CiviCRM contact
- Action:
  - Create a Drupal account linked to our CiviCRM contact

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The Rules user interface

- https://demo.gmcvodatabases.org.uk/admin/config/workflow/rules
- The action '*Create Linked Drupal User Account*' has options:
  - Username formats
  - Activate account (yes)
  - Send Account email (maybe)
  - Instant signin (we need this)
- This *action* also gives us access to the new account to do other *actions*
  - Add a 'volunteer' role?
  - Redirect somewhere?

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So far so good…so what next?

- Drupal user account created and user logged in automatically
- But….
  - What about remembering the opportunity and re-directing the user back to that page?
  - What about supplying a password? Otherwise they would have to do a password reset.

- These are both possible but a little more difficult

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Remembering the opportunity and re-directing

- Pass the opportunity to the webform in the URL
- Eg https://demo.gmcvodatabases.org.uk/vol-reg-v1?destination=node/25
- On webform submission, the form redirects to the field value

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Password

- 2 password text fields
- Webform validation module forces min. length
- Webform validation module ensures passwords match
- Add JavaScript in a ‘markup’ field to mask password text
- Password saved into CivCRM custom field
- Rule executes code to update Drupal account with custom field password
- Should also empty custom field (stored in plain text in db)

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