

Making Effective Use of the State CRM

**For State and County Leaders,
Volunteers, and IT Directors**

Purpose: make you more effective at building affiliates

- Login <https://lpcolorado.org/act>, authentication code
- Role of IT people
- User Roles
- CRM Record Types
- Keeping your CRM up to date
- Tasks
- Help Resources

Role of IT People

- problem solver
- first responder
- filter for national support
- not a code jockey, you will not be writing code
- you will be managing data and supporting users

User Roles

- <https://helpdesk.lp.org/user-responsibilities/>
- State Admin
- State Leader
- Campaign Volunteer**
- County Leader*
- County Volunteer*
- Editor
- Contributor

CiviCRM and Wordpress

- CiviCRM is open source software
- <https://civicrm.org/>
- Shared by all 50 state Libertarian parties, so functionality is the same for everybody
- Our data is in the same file as everybody else's, but coded for Colorado. You will only see Colorado data.
- Standard Wordpress functionality

CRM Record Types

- Contacts
- Campaigns
- Affiliates
- Contributions
- Other
- All these records are accessed with the CiviCRM link.

CRM Record Type - Contacts

- everybody who contacts you, registered voters, members, inquiries, etc.
- IT director has overall responsibility for checking and merging duplicates and accuracy
- Your volunteers will be updating these records
- Garbage in, garbage out
- Record contains name, address, phone, email, volunteer status, LNC info, voter info (districts, precincts, etc)

CRM Record – Contact – Source 1

- We get National inquiries (from LP.org) by email via LNCdata. They are not automatically added to our database as a contact record, so they have to be manually added unless we wait for them to show up in the monthly/quarterly LNC data dump.

CRM Record – Contact – Source 2

- Candidate records (via run-for-office) get added immediately to our database and, if there is no matching contact record, a contact record gets added as well. This sometimes leads to duplicate records if the data for the contact record was not a close enough match. An email is sent to LNCdata.

CRM Record – Contact – Source 3

- Inquiries on the state website just get added with a date added, which can be used to select them. Email is sent to LNCData. If they match a record on the file, we might not get any notification.
- Imports from county fairs, National, and Secretary of State just get added. No email is sent. If they match a record on the file, we might not get any notification, because they are not new.

CRM Record Type - Campaigns

- each campaign has a record, so somebody who runs for office twice will have 2 records, one for each campaign.
- campaigns director responsible
- original info comes from: <https://my.lp.org/run-for-office>
- Drives candidate lists, elected officials list.
- Record contains candidate contact info, status, office and level (fed, state, local), type, election date, and results (yours and oppositions)

CRM Record Type - Affiliates

- Each affiliate has a record
- Affiliate director responsible
- One record for each county and region.
- Linked to map.
- Created during initial site setup.
- Visitors to your site will see this, so keep it up to date.
- Has a place for status, point person, website, email.

CRM Record Type - Contributions

- Created from Donate page and paid event registration pages.
- Can import these during site setup and monthly. Used for outside sources like non-site Paypal, cash, and check donations.
- Imported donations must have contact id, so you'll have to match to your contact file. Set up a contact called Unknown Donor for cash.
- Lots of different reports available.
- Should match to your checkbook/general ledger.
- Useful for filing reports with your Secretary of State.

CRM Record Type - Other

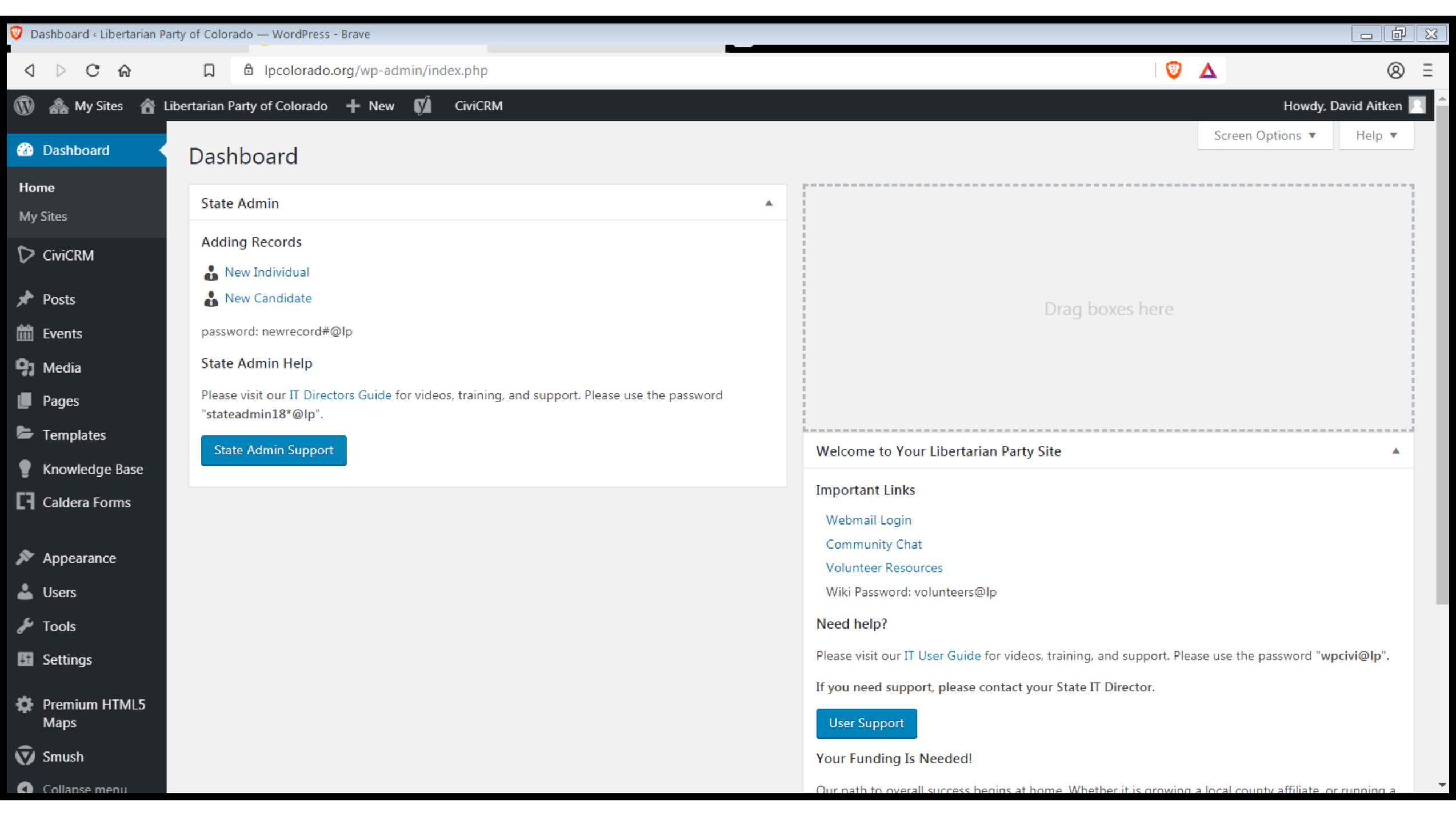
- Venues
- Employers
- Organizations
- Users

Keeping your CRM up to date

- Dashboard
- Add new contact/volunteer and candidates
- Find and update contacts
- Find and update candidates
- Find and update affiliates
- Contributions
- Events – Add/Update
- Posts – Add/Update

Dashboard

- Links to volunteer resources, IT directors, more.
- On the left is the sidebar menu. Dashboard entry gets you back here.
- Logoff is in the upper right.
- For State Admin - Add new Individuals (Contacts) and Candidates. Need password. Internal programs different from what external people see, but same function.



- Dashboard
- Home
- My Sites
- CiviCRM
- Posts
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Dashboard

State Admin

Adding Records

- [New Individual](#)
- [New Candidate](#)

password: newrecord#@lp

State Admin Help

Please visit our [IT Directors Guide](#) for videos, training, and support. Please use the password "stateadmin18*@lp".

[State Admin Support](#)

Drag boxes here

Welcome to Your Libertarian Party Site

Important Links

- [Webmail Login](#)
- [Community Chat](#)
- [Volunteer Resources](#)
- Wiki Password: volunteers@lp

Need help?

Please visit our [IT User Guide](#) for videos, training, and support. Please use the password "wpcivi@lp".

If you need support, please contact your State IT Director.

[User Support](#)

Your Funding Is Needed!

Our path to overall success begins at home. Whether it is growing a local county affiliate, or running a

CiviCRM Home

- Activities assigned to you – phone calls, etc.
- Top menus – Search, Contacts, Contributions, Events, Mailings, Reports, Support, Volunteers
- Events at top are paid/registration events and are different from Events on Sidebar, which are non-paid, no registration events. Paid events are things like conventions; non-paid events include county meetings and volunteer activities.
- Mailings at top are CiviMail and have to be CANSPAM compliant. Other emails are sent by SimpleMail via Search and are limited to 50 because they are not CANSPAM compliant.

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CiviCRM

CiviCRM Home

Configure Your Dashboard

Refresh Dashboard Data

Activities

Filter by Activity

Include:

Exclude:

Date:

Status:

Show 25 entries

First Previous Next Last

Type	Subject	Added By	With	Assigned	Date	Status
None found.						

Showing 0 to 0 of 0 entries

First Previous Next Last

Searching for records

- Sidebar menu CiviCRM Home
- 3 – Simple Contacts, Advanced Search, Search Builder
- Simple Contacts – name and record type only
- Advanced Search – predefined fields, no wild cards, no empty/not empty. Scroll down for more fields, see Custom Fields for voter info, etc.
- Search Builder – free form, wild cards(%), allows empty/not empty.

Find and update contacts

- Contacts are last name, (comma) first name – smith, john.
- Campaigns are first name last name – john smith. Smith will get both.
- Results, at top, select records to see bulk options – export, email, etc. Edit search criteria to change.
- Lots of search options under Custom Fields.
- Updating has 2 options – view and edit on the right side.

Advanced Search

Search Criteria

Display Settings For Results

Display Results As

Views For Display Contacts

Search Settings

Search Operator

 AND OR

Search

Reset Form

Basic Criteria

Complete OR Partial Name

Complete OR Partial Email

Contact Type(s)

Group(s) *(search by group type)*

Select Tag(s)

All Tags

Phone

Phone Location

Phone Type

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CiviCRM » Find Contacts

Search Builder

Search Criteria

Include contacts where

- select record type - -operator-

» Another search field

» Also include contacts where

Search

Access Keys: ?

Powered by CiviCRM [5.12.0](#). CiviCRM is openly available under the [GNU AGPL License](#).

[Download CiviCRM.](#) [View issues and report bugs.](#) [Online documentation.](#)

Find and update contacts – View

- Each area (name, address, email, phone, National, volunteer, etc., is clickable to edit.
- There are tabs across the top for other editable information – activities, relationships, etc.
- Save and Cancel buttons at top left.

Find and update contacts – Edit

- Opens contact with all fields available to edit.
- Save or Cancel at top. Use either to get to View, other choices.
- Return to Search Results at top after Save or Cancel.
- Fill in the field and Save.

Find and update candidates

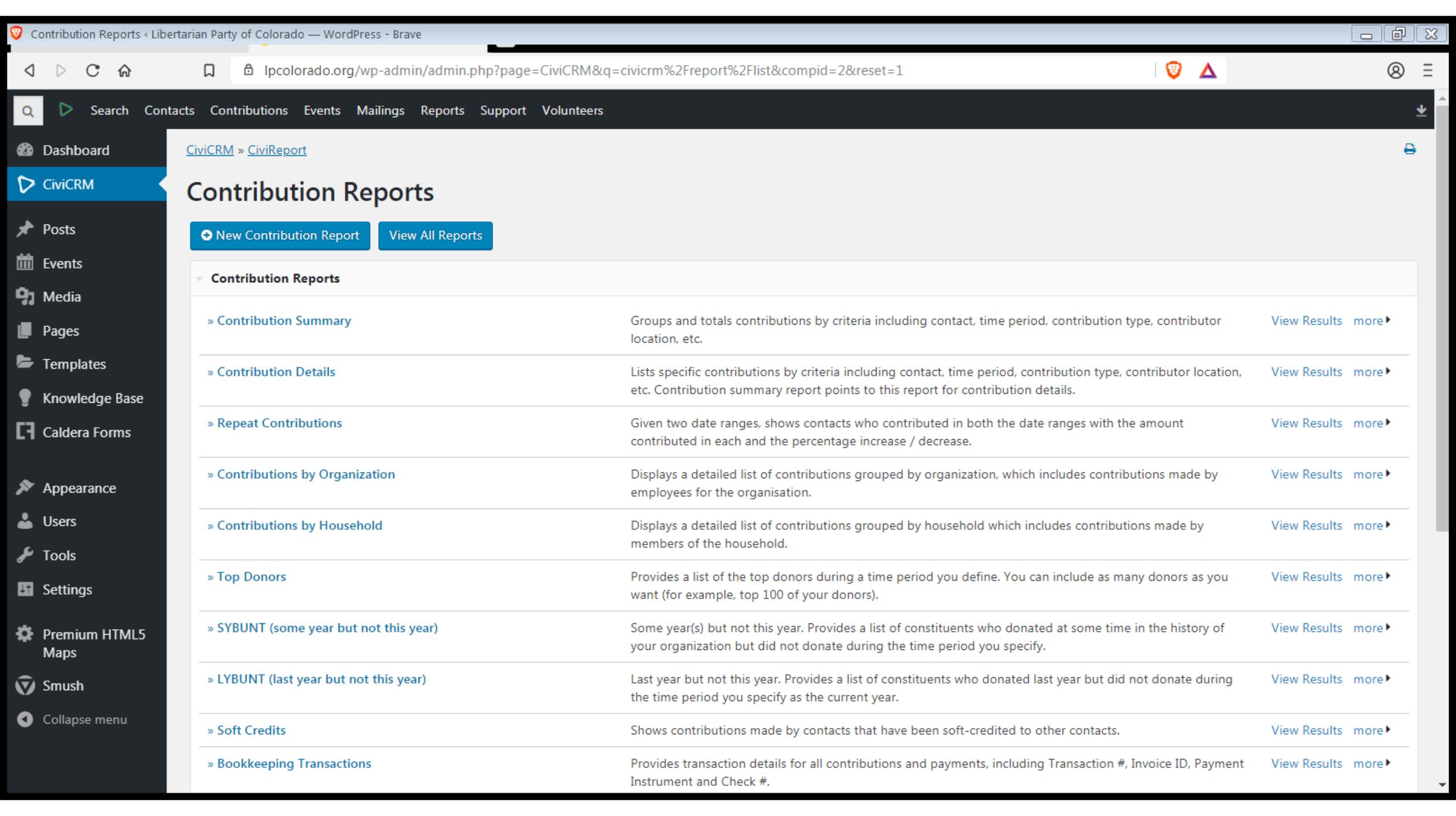
- Use Advanced Search – first name last name – john smith, record type
- Custom Fields>Campaign Overview section for general parameters – year, level, etc.
- View, Edit work same way as Contacts.
- Campaigns Director responsibility.

Find and update affiliates

- Advanced Search, county name in name field, record type
- Custom Fields>Local Affiliates
- Email, Point Person, Status
- Linked to Map, visible to website visitors
- Affiliates Director responsible for these records.

Contributions

- Menu at top of CiviCRM Dashboard
- Find Contributions is a specialized search tool
- Contribution Reports most useful for general reporting. It has a number of reports available, including Contribution Detail.
- Contribution Detail shows individual contributions for the specified criteria.
- You can export (csv) or print reports.



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CiviCRM » CiviReport

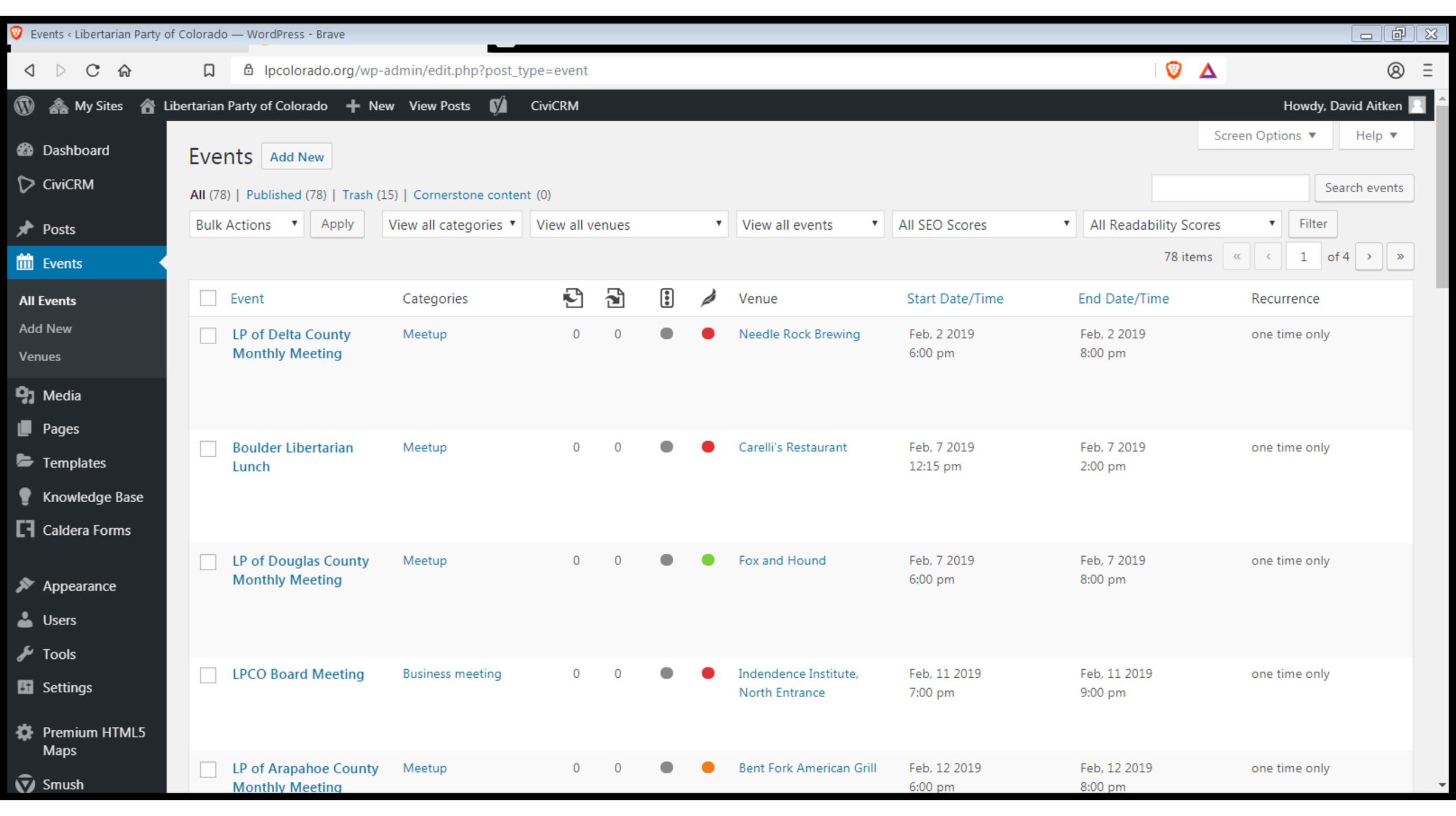
Contribution Reports

[New Contribution Report](#) [View All Reports](#)

Contribution Reports		
» Contribution Summary	Groups and totals contributions by criteria including contact, time period, contribution type, contributor location, etc.	View Results more ▶
» Contribution Details	Lists specific contributions by criteria including contact, time period, contribution type, contributor location, etc. Contribution summary report points to this report for contribution details.	View Results more ▶
» Repeat Contributions	Given two date ranges, shows contacts who contributed in both the date ranges with the amount contributed in each and the percentage increase / decrease.	View Results more ▶
» Contributions by Organization	Displays a detailed list of contributions grouped by organization, which includes contributions made by employees for the organisation.	View Results more ▶
» Contributions by Household	Displays a detailed list of contributions grouped by household which includes contributions made by members of the household.	View Results more ▶
» Top Donors	Provides a list of the top donors during a time period you define. You can include as many donors as you want (for example, top 100 of your donors).	View Results more ▶
» SYBUNT (some year but not this year)	Some year(s) but not this year. Provides a list of constituents who donated at some time in the history of your organization but did not donate during the time period you specify.	View Results more ▶
» LYBUNT (last year but not this year)	Last year but not this year. Provides a list of constituents who donated last year but did not donate during the time period you specify as the current year.	View Results more ▶
» Soft Credits	Shows contributions made by contacts that have been soft-credited to other contacts.	View Results more ▶
» Bookkeeping Transactions	Provides transaction details for all contributions and payments, including Transaction #, Invoice ID, Payment Instrument and Check #.	View Results more ▶

Events – Add/Update

- Use for County meetups and volunteer events.
- use Events on Sidebar Menu
- Add New. Enter a 4-8 word title.
- Describe the event.
- Choose a date and a venue.
- Hover over Events list to clone, change author, category, etc.



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Howdy, David Aitken

Events [Add New](#)

Screen Options Help

All (78) | Published (78) | Trash (15) | Cornerstone content (0)

Search events

78 items << < 1 of 4 > >>

<input type="checkbox"/>	Event	Categories					Venue	Start Date/Time	End Date/Time	Recurrence
<input type="checkbox"/>	LP of Delta County Monthly Meeting	Meetup	0	0	●	●	Needle Rock Brewing	Feb, 2 2019 6:00 pm	Feb, 2 2019 8:00 pm	one time only
<input type="checkbox"/>	Boulder Libertarian Lunch	Meetup	0	0	●	●	Carelli's Restaurant	Feb, 7 2019 12:15 pm	Feb, 7 2019 2:00 pm	one time only
<input type="checkbox"/>	LP of Douglas County Monthly Meeting	Meetup	0	0	●	●	Fox and Hound	Feb, 7 2019 6:00 pm	Feb, 7 2019 8:00 pm	one time only
<input type="checkbox"/>	LPCO Board Meeting	Business meeting	0	0	●	●	Indendence Institute, North Entrance	Feb, 11 2019 7:00 pm	Feb, 11 2019 9:00 pm	one time only
<input type="checkbox"/>	LP of Arapahoe County Monthly Meeting	Meetup	0	0	●	●	Bent Fork American Grill	Feb, 12 2019 6:00 pm	Feb, 12 2019 8:00 pm	one time only

Posts – Add/Update

- Use for News, Press Releases, etc.
- Add New. Enter a 4-8 word title.
- Paste from a word document.
- Pick a category.
- Publish or update.
- Hover over Post list to clone, change author, category, etc.

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Howdy, David Aitken

Screen Options Help

Posts [Add New](#)

All (119) | Mine (1) | Published (119) | Cornerstone content (0)

Search Posts
 119 items << < 1 of 6 > >>

Bulk Actions
 All dates
 All SEO Scores

<input type="checkbox"/>	Title	Author	Categories	Tags	Date				
<input type="checkbox"/>	LPCO Elects a Fresh New Board of Directors	LP Colorado	Press Releases	—	Published 2019/05/03	0	0		
<input type="checkbox"/>	2019 State Convention Awards	LP Colorado	News	—	Published 2019/05/02	0	0		
<input type="checkbox"/>	LPCO Opposes HB19-1212	LP Colorado	Press Releases	—	Published 2019/04/29	0	0		
<input type="checkbox"/>	LPCO Opposes HB19-1278	LP Colorado	Press Releases	—	Published 2019/04/29	0	0		
<input type="checkbox"/>	Fight HB19-1177, Extreme Risk Protection Orders	LP Colorado	News	—	Published 2019/03/20	1	0		
<input type="checkbox"/>	2019 Convention Committee Reports	LP Colorado	News	—	Published 2019/03/20	1	0		
<input type="checkbox"/>	Applications Solicited for National Platform Committee Appointments	LP Colorado	News	—	Published 2019/03/15	1	0		
<input type="checkbox"/>	Grand Junction City Elections Ballot In Your mailbox!	LP Colorado	News	—	Published 2019/03/15	0	0		
<input type="checkbox"/>	Arapahoe County Call for Local Candidates	LP Colorado	News	—	Published 2019/03/01	0	0		

Tasks

- Phone Banking
- Email small groups of people

Phone Banking

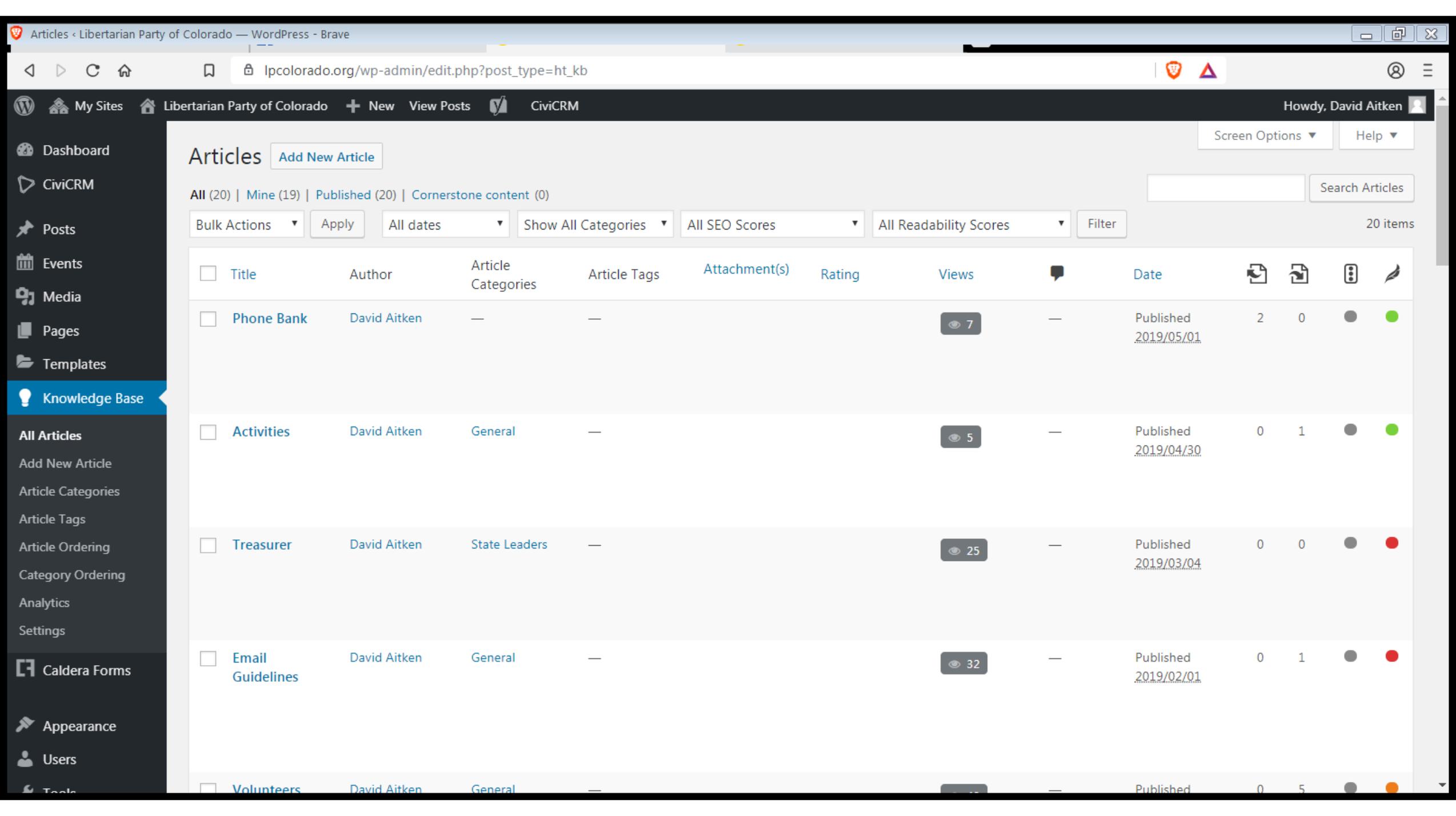
- Select the records of the people you want to call
- Add a Phone Call activity to each record via Add Activity
- Activity will show on the CiviCRM Dashboard of the person the activity was assigned to.
- Their task is to work through the list, updating the activity status with any relevant notes.
- When the status of an activity is Complete, the activity will be removed from their Dashboard.

Email small groups of people

- Select the records of the contacts you want to email
- Under Action, choose Email – send now
- You can use tokens which personalize the email. Some tokens are first and last name, address, city, county, districts, etc.
- CANSPAM standards are highly recommended.
- The Colorado list is emailed twice a month with CANSPAM standards, so it should be clean.

Help Resources

- Knowledge Base <https://lpcolorado.org/kb/>
- <https://helpdesk.lp.org/wiki/state-wiki/>
- https://helpdesk.lp.org/help_category/it-users/ - may need password from your dashboard.



Articles

[Add New Article](#)

All (20) | Mine (19) | Published (20) | Cornerstone content (0)

Bulk Actions All dates All SEO Scores All Readability Scores

20 items

<input type="checkbox"/>	Title	Author	Article Categories	Article Tags	Attachment(s)	Rating	Views		Date				
<input type="checkbox"/>	Phone Bank	David Aitken	—	—			7	—	Published 2019/05/01	2	0		
<input type="checkbox"/>	Activities	David Aitken	General	—			5	—	Published 2019/04/30	0	1		
<input type="checkbox"/>	Treasurer	David Aitken	State Leaders	—			25	—	Published 2019/03/04	0	0		
<input type="checkbox"/>	Email Guidelines	David Aitken	General	—			32	—	Published 2019/02/01	0	1		
<input type="checkbox"/>	Volunteers	David Aitken	General	—				—	Published	0	5		

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Screen Options

Search Articles



[2019 State Convention](#)

[The Libertarian Party](#)

[Get Involved](#)

[Signup](#)

[Donate](#)

Archives: Articles



Search the Knowledge Base

Search

General (7 Articles)

- [Activities](#)
- [Email Guidelines](#)
- [Events – Add and Edit](#)
- [Need Help?](#)
- [Posts – Add and Edit](#)

State Leaders (7 Articles)

- [Affiliate Development Director](#)
- [Campaigns Director](#)
- [Communications Director](#)
- [Membership Director](#)
- [Outreach Director](#)

Campaigns (2 Articles)

- [Campaign Ideas](#)
- [Campaign Tools](#)
- [View all](#)