



ARCS® Foundation, Inc.

Achievement Rewards for College Scientists, Inc.

ARCS Foundation Website:

Contact Management

Contact Management (Draft) Revised December 5, 2016 | Page 1 of 27



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Manage Contacts

On the ARCS Foundation website all the ARCS members, scholars, donors, chapters, organzations, etc., are managed as CiviCRM contacts. There is one contact record per person or organization. The following section describes how to create new contacts (members, scholars, organizations, etc.)

New Individual

The easiest way to create a contact record in the CiviCRM database is to login into your Chapter secure site, switch to the CiviCRM menu by clicking on CiviCRM in the black menu bar at the top of the screen.





After clicking on **New Individual**, you see the page shown below. It is recommended that you fill in as much information as possible. **Note:** If you are entering information for a scholar, be sure and make the contact type "Scholar" by choosing "Scholar" from the drop down for the Contact Type field (see red arrow.)

Home » CiviCRM » CiviCRM			
New Individual			
		•	<u></u>
*			Expand all tabs
✓ Save + Save and New × Cancel			
👻 Contact Details			
Prefix First Name	Middle Name	Last Name	Suffix
- *			· · ·
Current Employer 🕄	Job Title	Nickname	Contact Type
- none -			× Scholar v
Email add	On Hold? <table-cell></table-cell>	Bulk Mailings? <table-cell></table-cell>	
Home 🔻		0	
▶ Signature	-		
Phone .	Phone Location	Phone Type	
ext.	Home	Phone	
Instant Messenger	IM Location	IM Type	
	Home	Yahoo 🖌 🎽	
Add another IM			
Open ID	Open ID Location		
	Home *		
Add another Open Id	Wabsita Tupa		
Website W	Work Y -		
Add apother website	WORK X Y		
Source 2 External ID 2			
Browse/Upload Image 😧			
Choose File No file chosen			
Check for Matching Contact(s)			
Member Only Information			
General Information			
 National Board Information 			
 Scholar Eligibility (Admin Use Only) 			
Scholars Only - Education			
Scholars Only - General Information			
 Event Participant Information 			
→ Address			
Communication Preferences			
> Notes			
Demographics			
Tags and Groups			
✓ Save + Save and New × Cancel			
			Access Keys:

Depending on what you are working on within the website, you may encounter some other pages where you will also be able to enter a new individual. For example, if you go to **Events>>Register Event Participant**, you can add a new individual by selecting "New Individual" from the "Contact" drop down menu.



Home » CiviCRM »	 CiviCRM 			
New Event I	Registra	ation		
✓ Save + S	Save and I	New Cancel		
Co	ontact *	- select contact -		
	Event *	1 4	λ	
Participant R Registration Participant S	tole Id * n Date * Status Id *	Start typing a name or email Refine search •		الم
Participan	nt Source	Source for this registration (if applicable).		
	Notes			7.
+ Additional Pa	articipant	Registration Details (Admin Use Only)		
✓ Save + S	Save and I	New Cancel		

Note: Not all contacts entered under **Manage Contacts** can sign in to the website. If you want a contact to have access, in addition to creating a new scholar or member CiviCRM contact record, you need to create a Drupal user account. For more information, refer to the <u>Add a User</u> <u>Account</u> section.

Contact Details

Whether you are entering a new individual into the database <u>or</u> updating the contact record of an individual that is already in the database, you will find most fields in this section selfexplanatory, with a few exceptions. If an individual is already in the database, search and find the individual's contact record using the **Search>>Find Contacts** option from the black bar menu at the top of the screen.

\leftrightarrow \Rightarrow G	https://utah.a	rcsfoundation.	org /civicrm/p	articipant/a	dd?reset=1	&action=add&	context=stand	alone
Contacts 🔍 🏷	Search Contacts	Contril wons E	ivents Mailings	Memberships	Awards Rep	ports Administer	Support	
	Find Contacts							
	Advanced Search	C ADVANC						
	Full-text Search		e rica [®]					
	Search Builder	· .						
	Find Contributions		Home » CIVICRN	I » CIVICRM				
	Find Mailings		New Even	t Registrat	ion			
	Find Memberships	he sending		riogioriai				
	Find Participants	for expired	✓ Save +	Save and Ne	w × Cance	el 🛛		
	Find Pledges			Contact *	- select contact		٩	
	Find Activities			Event *	-	52		
	Custom Searches			event .	- select event -		٩	
	First Name		Participant	Role Id *	anv -		_	Ju .



Click on the edit option for the contact you want to edit.

Home » CiviCRI	M » CiviCRM	1							
Find Cont	acts								.
• Edit Se	arch Crit	teria							
1 Contact Select Reco	Na ords: ®	ime or Email LIKE - 'r) The found record	night'	•					 » Advanced Search » Search Builder P
A B C	DEF	GHIJK	L <u>M</u> N	O P Q	RST	UVW	X Y Z <u>Ali</u>		
× Reset all se	lections								
	Name	Address	🕆 City	🕴 State	🕴 Postal	Country	Email	Phone	Action
🔲 🔒 Mig	ht, Diane	38100 N. 108th St.	Scottsdale	AZ	85262	United States	dynamite@cable	480-297-7008	View Edit mode

The contact record contains several different sections which can be opened or closed by clicking on the right pointing arrow before each heading.



Usually when you open a contact card for editing, the "Contact Details" section is expanded as shown below. You can open and close each section by clicking the arrow in front of the section name.

Contact Details

A contact may have multiple contact points for **Email**, **Phone**, **Instant Messenger**, **Open ID**, or **Website**. To add an additional contact point for any of these fields, click **add** just to the right of the field name (see red arrow to left in screenshot below). For multiple emails and phone numbers, be sure to indicate the type in the drop down box to the right of these fields.



Home 💌	
Billing	
Home	
Main	
Other	-
Work	

Be consistent on how you enter these fields and be sure to always check which is the **Primary** contact field (see red arrows to right in screenshot below).

Note that one of the underlying assumptions of the website is that everyone has their own unique email address – do not allow two people (husbands and wives, for instance) to share an email address in the database. Shared email addresses result in semi-shared identities and unexpected name changes, etc., that can be very tedious to unwind.

My Profile Note: Only the location type "Home", "Home" and "Other Mobile" phone numbers auto-populate the **My Profile** Page. Contact the <u>IS Committee</u>, if you need different contact information to populate **My Profile**. Is this still true?

Prefix First Name Middle Name Last Name Suffix Misk Joan Might Image: Contact Type Current Employer () Job Title Nickname Contact Type Image: Contact Type Job Title Nickname Contact Type Image: Contact Type Image: Contact Type Image: Contact Type Image: Contact Type Image: Contact Type Image: Contact Type Image: Contact Type Image: Contact Type Image: Contact Type Image: Contact Type Image: Contact Type Image: Contact Type Image: Contact Type Image: Contact Type Image: Contact Type Image: Contact Type Image: Contact Type Image: Contact Type Image: Contact Type Image: Contact Type Image: Contact Type Image: Contact Type Image: Contact Type Image: Contact Type Image: Contact Type Image: Contact Type Image: Contact Type Image: Contact Type Image: Contact Type Image: Contact Type Image: Contact Type Image: Contact Type Image: Contact Type Image: Contact Type Image: Contact Type Image: Contact Type Image: Contact Type Image: Contact Type Image: Contact Type Image: Contact Type Image: Contact Type Image: Contact Type Image: Contact Type Image: Contact Type Image: Contact Type Image: Contact Type Image: Contact Type Image: Contact Type Image: Contact Type Image: Contact Type Image: Contact Type
Mrs. x Diane Joan Might Alight Current Employer ? Job Title Nickname Contact Type Email add On Hold? ? Bulk Mailings? ? Primary? dynamite@cableone.net Main Signature delete Phone Phone Location Phone Type Primary? 480-297-7008 ext. Main Phone 480-297-7008 ext. Other Mobile delete Add another Phone number Other Mobile delete delete
Current Employer ? - none none none none none none none none
- none - Email add On Hold? Email add On Hold? dynamite@cableone.net Main isignature dynamite@cableone.net Billing • Signature Phone Phone Phone 480-297-7008 ext. Home Phone • Other Mobile • Other
Email add On Hold? @ Bulk Mailings? @ Primary? dynamite@cableone.net Main • • • isignature • • • • dynamite@cableone.net Billing • • • isignature • • • • • Phone Phone Location Phone Type Primary? • • 480-297-7008 ext. Main • Phone • • 480-297-7008 ext. Home • • • • • 480-297-7008 ext. Other • Mobile • • • Add another Phone number • • • • • • •
dynamite@cableone.net Main Signature dynamite@cableone.net Billing Signature Phone Phone Location Phone Type Primary? 480-297-7008 ext. Main Phone Home Phone delete delete 480-297-7008 ext. Other Mobile delete delete 480-297-7008 ext. Other Mobile
Signature dynamite@cableone.net billing > Signature Phone Phone 480-297-7008 ext. Home Phone 480-297-7008 ext. Home Other Mobile Add another Phone number
dynamite@cableone.net Billing delete > Signature Phone Phone Location Phone Type Primary? 480-297-7008 ext. Main Phone 480-297-7008 ext. Home delete 480-297-7008 ext. Other Mobile delete 480-297-7008 ext. Other Mobile delete
• Signature Phone Phone 480-297-7008 ext. Home Home Phone 480-297-7008 ext. Home Phone Øbile Add another Phone number
Phone Phone Location Phone Type Primary? 480-297-7008 ext. Main Phone • 480-297-7008 ext. Home • • 480-297-7008 ext. Other • • Add another Phone number • • •
480-297-7008 ext. Main Phone Image: Constraint of the state of the
480-297-7008 ext. Home Phone delete 480-297-7008 ext. Other Mobile delete Add another Phone number Mobile delete delete
480-297-7008 ext. Other Mobile Image: Comparison of the second sec
Add another Phone number
Instant Messenger IM Location IM Type
Home v Yahoo v
Add another IM
Open ID Open ID Location
Home T
Add another Open Id
Website 😯 Website Type
Home x v
Home X + delete
Add another website
prix_33 2250

The **SIGNATURE** link allows you to save a closing that will appear in all sent emails (name, email, phone #, etc.). The **On Hold?** box above is most commonly used to mark an email address that is bouncing. If you are using the CiviMail component, emails that bounce excessively are



automatically placed on hold and mailings are not sent to this address. You can also set (or unset) this option manually. By default, CiviMail sends mail to each contact's primary email address. However, if a contact prefers to have CiviMail **Bulk Mailings** sent to an alternate email address – click the **Bulk Mailings** box next to that email address.

The **Website** field should be filled with links to social networking sites such as Facebook or Twitter and/or company/organization or personal websites.

The **Source** field can be used to designate who is responsible for this contact being in the database.

To **Browse/Upload Image** you want displayed when viewing a contact, click on **Choose File**, find the picture you want to upload in your file system and select it. When you click on **Save** at the top of the CiviCard, you will see the picture you saved directly below the CiviCard tabs:

tions	Edit 🗍 🗘 Delete	Contact								
Summary Cont	ributions 44 Pledges 0	Memberships 3	Events 28	Activities	\$ 2885	Awards 0	Relationships 0	Groups 7	Notes 2	Tags 1
Change Log 819										
mployer					Tags		NB Members M	lasterlist		1
ob Title					Conta	ct Type	Individual			hit.
lickname					CiviCF	M ID / User I	ID 2950 / 9			
ource					Extern	al ID	phx_53			1
Main Email	dynamite@cableone.r	et			Main	Phone	480-297-7008			
Billing Email	dynamite@cableone.r	et			Home	Phone	480-297-7008			
					Other	Mobile	480-297-7008			
					78.4					

Member Only Information

Scroll down and click the arrow by the **Member Only Information** heading, and the screen below will appear. Because of the organization of the database all fields that have been defined for all chapters will appear here. In particular, the "Committee Interest" fields for Atlanta, Portland and Illinois are labeled for their use. If you are working on contacts for other chapters, please use the section labeled "Committee Interest". The "Skills and Interests" section is common to all chapters.

Member Award Received – You may indicate an award received, such as the ARCS Light Award, in the "Member Award Received" field. Please note that you should also enter an ARCS Light Award as a "Relationship." See the Relationship section for details.

The remainder of the fields should be self-explanatory.



 Member Only Inform 	nation			
Member Founding/Charter	Select × •	p		
Member Award Received	ARCS Light			
Member Date Award Received	01/01/2012 *			
Year Joined ARCS Foundation	2002 ×			
Person(s) who sponsored and/or introduced you to ARCS				
Atlanta Committee Interest	Communications	ectory 📃 Ed Ids Development 📃 Me	ucation: Field Trips an mbership	d Retreats
	New Member Mentors New	vsletter 📃 Pu	blic Relations	
	🗆 Scholars Luncheon 👘 🗆 Spe	akers Bureau 👘 🗆 Tw	enty-Fifth Anniversary	,
	University Relations	bsite 🗌 Wi	lling to Chair a Comm	ittee
ILLINOIS	Data Management and Websi	te 🛛 Fundraising and	Development	
COMMITTEES: Please	Marketing and Communicatio	ns 🔲 Membership		
check all areas of interest	Programs and Events	Scholar Outreach	1	
	Scholar Award Luncheon	University Relation	ons	
Oregon Member	COMMUNICATIONS: Learn to	create a MailChimp em event photographer	ail, post articles on the	e website; write and help produce the Annual
Participation	FINANCE: Monitor the Chapter	event photographen r's finances; make reco	mmendations for and	track investments, monitor investment
	manager; develop financial polic	ies and procedures.		
	FUND DEVELOPMENT: Introdu	ice corporations or foun	dations to ARCS; assi	st in grant writing; plan stweardship
	GOVERNANCE: Ensure the or	potential donors; mad panizational structure o	e learn to make the a f the Chapter by devel	oping, monitoring, and revising the legal and
	financial documents. Examine o	verall chapter structures	to guarantee the hea	Ith of the Chapter.
	HOSTING: Host a gathering i	n your home, planned, o	atered and paid for b	y the Chapter.
	MEMBER RELATIONS: Identify	potential members; co	ordinate new membe	r orientations; plan the all member Summer
	PROGRAM: Plan ARCS progra	ms; suggest and help s	ecure speakers; atten	d program events and greet attendees,
	SCHOLAR RELATIONS: Plan o	rientations for first-year	scholars at OHSU, O	SU, or UO; plan the Scholar Picnic; organize
	Celebrate the Scholars event for	third-year scholars; an	range scholar lab tour	5,
	 SCHOLAR AWARDS LUNCHED PowerPoint presentation; coordininvitations; write thank you note 	N: Plan the SAL by servent nate invitation and prog es.	ring on the committee ram production; assis	; volunteer at the event; develop the t with securing underwriting; address
	UNIVERSITY RELATIONS: Par	ticipate in scholar orien	tations; serve as a liai	son to OHSU, OSU or UO; track scholar data.
Committee Interest	Annual Scholar Award Event	Communications	Event Planning/Ma	anagement
	Finance Control	Fund Development	Fundraising Event	s/Benefits
	Governance/Policy	Hospitality Deinting	Member Relations Drograms/Education	an/Field Trins
	Publications/Newsletter	Public Relations	Scholar Relations/	Outreach
	Special Events	University Relations	Website/Computer	r
Okilla and Tabasata	 Accounting/Budget Planning/ 	Finance Art/Graphic	5	Communications
Skills and Interests	Community Connections	🗆 Database M	anagement	Desktop Publishing
	Event Planning/Management	🗆 Floral Desig	n/Flavors/Decoration	Fundraising
	🗆 Legal	Marketing/P	ublic Relations	Photography
	Publishing/Printing	Sales		Special Events
	Strategic Planning	🖉 Website/Co	nputer	U Writing/Editing/Proofreading
Current or Prior				
Volunteer Activities and Offices Held				
Education	R.A. Chamistar Restan Unit			
	B.A. Chemistry Boston Univ			
affiliated with				
Employer Matching Funds	○ Yes ○ No			
Suggestion for Future				
Programs and New				
Members	Please indicate if you plan to pre	sent a motion at the ne	kt board meeting. All r	notions should be discussed in advance with the
Description of the Color	Chapter President allowing suffic	ent time for circulation	to the Board Members	at least one week prior to the meeting.
Presenting Motion(s)?	Ves No			
Reporting Chapter ID	784			
Reporting Chapter	Phoenix × •	p		



General Information

This section contains fields that are useful when printing labels or doing mailings.

 General Informatio 	n
	Member, Friend of ARCS and University Contact Household Addressee used for addressing luncheons, tax letters and thank you's (i.e. Mr. and Mrs. Joe Jones, Mrs. Ralph Matteucci, Ms. Anna Maria Matteucci)
Household Name	Mr. and Mrs. Thomas Might
	Member, Friend of ARCS, and University Contact Household Postal Greeting for tax letter and thank you's (i.e. Dear Mr. and Mrs. Jones, Dear Mrs. Matteucci)
Household Postal Greeting	Dear Mr. and Mrs. Might
	Use this field for name badges so that only those with important titles will show on name badges. Place the title in the text box i.e. Dr., Hon., Gen.
Formal Title (Name Badge)	
Full Name	
Maiden Name (if applicable)	Hollandsworth
Occupation or Profession	Educational Leadership
Spouse / Significant Other Name	Mr. Thomas Might
Spouse / Significant Other Occupation or Profession	CEO Cable One
Spouse / Significant Other Education	B.S. Industrial Engineering
Permission to use photographs of myself take at ARCS Foundation events in ARCS Foundation newsletters, website or social media?	○ Yes ○ No
Permission to add my contact information to the ARCS Foundation mailing list?	O Yes O No

Although you can note a **Spouse or Significant Other** on this page, you should create a contact record for the spouse and create a **Spouse** relationship between the two contact records. More information about entering **Relationships** can be found later in this document. Other fields that a Chapter might find useful in reports or exports can be added to the this section. Contact the <u>IS</u> <u>Committee</u> for more information.



National Board Information

This section is for use by the National Data Administrator and does not need to be filled in by Chapters.

Scholar Eligibility (Admin Use Only)

This section can be used by those involved with the chapter scholars to record information about a scholar.

🝷 Scholar Eligibility (Adı	nin Use Only)
University Approved Applicant	© Yes ◎ No
U.S. Citizen	O Yes O No
Current GPA	
Scholar Advisor	
Anticipated Graduation Date (yyyy-mm)	
Actual Graduation Date (yyyy-mm)	
	If an alternate more then one year, indicate years separated by commas.
University Approved Alternate (уууу)	
University Applicant Status	- none - 🔹 🎽





Scholars Only - Education

This section is specific to ARCS Scholars and Alums and is where the information from the Scholar Portal **Education** page is stored. The **First Degree** (or any other ___**Degree** field) should be the type of degree they received such as Bachelors or PhD. The **First Degree Field of Study** (or any other ___**Degree Field of Study** field) should be what they majored in. The **First Degree School** (or any other ___**Degree School** field) should be the school or university where they received their degree. This does not have to match where they are receiving their scholar award. The **"Date First Degree Received** (or any other **Date ___Degree Received** field) should be their graduation date.

 Scholars Only - Educa 	ition
First Degree	
First Degree Field of	
Study	
First Degree School	
Date First Degree Received	
Second Degree	
Second Degree Field of Study	
Second Degree School	
Date Second Degree Received	
Third Degree	
Third Degree Field of Study	
Third Degree School	
Date Third Degree Received	
Fourth Degree	
Fourth Degree Field of Study	
Fourth Degree School	
Date Fourth Degree Received	
Fifth Degree	
Fifth Degree Field of Study	
Fifth Degree School	
Date Fifth Degree Received	



Scholars Only – General Information

This section is specific to ARCS Scholars and Alums and is where the information from the "Involvement" section from the Scholar Profile.

 Scholars Only - Gen 	eral Information
Faculty Advisor	
Advisor's Email	
I would be interested	Being a speaker at an ARCS event or meeting
in	Sponsoring a field trip to your facility
	Participating in PR endeavors for ARCS
	Making a tax-deductible contribution to the chapter of my choice
	Becoming a member or Friend of ARCS
	Having ARCS members attend my dissertation and/or presentation Jaining ARCS on codial modia
	G Joining Arcs on social media
Professional Societies	
Userse Arreste	
Patents	
Additional Comments	
Featured category	
Featured biography	
	B I U S X ₂ X ² I _x I = 1 = 1 = 1 = 1 = 1
	Styles Format Font Size A- O ?

Event Participation

This section was included for backwards compatibility and should not be used going forward. If you need to record information like this for an event, please contact <u>is.help@arcsfoundation.org</u> for help in adding custom fields to events.

Address

Contacts may have several **Location Types** (work, home, other, etc.). Select the **Location Type** from the drop down menu. Click whether or not this is the **Primary location for this contact** or **Billing location for this contact**. To add another address, click **Another Address** at the bottom of the section.



* Address
Address Location Type Home 🔹 🖲 Primary location for this contact 🗆 Billing location for this contact Delete this address
Use another contact's address 🕢
Street Address 😥
2630 E Stringham Ave
Supplemental Address 1 🕡
Apt #A220
Supplemental Address 2
City Zip / Postal Code Suffix
Salt Lake City 84109
Country State/Province
United States x + Utah x +
Latitude, Longitude 🕖
40.7210603 / -111.8163291
Override a program geocoding 🕢
O Another Address

Communication Preferences

Use the **Email and Postal Greeting** drop down menus to determine salutations. Use the **Addressee** drop down menu for mailing labels. For greetings and addressee, you can select one of the standard formats based on token values (i.e. fields noted directly on the contact record) <u>or</u> you can customize the greeting and/or addressee information. When you send an email or export a list of records to a .csv or.xlsx file for mail merging, the greeting and addressee fields will reflect your preferences.

Select the preferred methods for privacy and communicating. The **NO BULK EMAILS** box is set by the contact when they don't want to receive bulk emails. Changing it will override the preference they set.

 Communication Preferences 			
Communication Style 🚱 🖲 Formal 🤇 Email Greeting	Familiar Postal Greeting	Addressee	0
Dear Philip	Dear Philip	Philip Erickson 🧪	
Privacy () Do not phone Do not email Do not mail Do not sms Do not trade	Preferred Method(s) 9 Phone Email Postal Mail SMS Fax	Preferred Language	
NO BULK EMAILS (User Opt Out)	Email Format Both Both		



Demographics

Click **DEMOGRAPHICS** and the following screen will appear. Here you can track gender and birthdates, and whether an individual is deceased.

✓ Demographics	
Gender O Female O Male O Transgender . Date of Birth	Note: This is where you can indicate when a member is deceased. Be sure to remove any Groups and Tags from the deceased member.
Contact is Deceased	L

Checking the **Contact is deceased** box for a member immediately changes her Membership Status to deceased and removes her from your Chapter Roster and the All ARCS Roster. While you are in the CiviCard, you should also manually remove her from all Groups so she no longer receives emails, etc.

Tags and Groups

The assignment of proper groups and tags is critical for searches. Groups are used for mailing lists, the assignment of permissions, and to search/filter contacts based on groups and tags. Tags and Groups are discussed in further detail in the <u>New Group</u>, <u>Manage Groups</u>, <u>New Tags</u>, and <u>Manage Tags</u> sections.

Opening the **TAGS AND GROUPS** section will display the screen below. Groups will vary from Chapter to Chapter, but Tags are shared by all Chapters. You can create new groups and tags, as needed.

Use the **X** in front of a group name to delete the contact from the group. To add the contact to a group, click on the down arrow at the top right hand side of the "Group" box (as indicated by the red arrow below) and select the group from the list. Note that all members must be in the **General Member** group. This is an **Access Control** group that provides basic permissions within the system.

Members can be assigned to additional **Access Control** groups based on their positions and responsibilities within the Chapter (e.g., Chapter Board, Chapter Administrator). Note: The group designation is used for organizational purposes such as mail management (email blasts), events, etc., and **does not** relate to the chapter roster or membership status.

All Scholars and Scholar Alums must be in the **Scholar & Scholar Alum** group. This limits the contact's access to the scholars' secure site only.

In addition to **Access Control**, you can assign members of a group to be in selected **Mailing Lists** for emails and searches.



Tags allow searches to be narrowed further. To identify the contact as a scholar, donor, member, etc. add a tag to the contact. An individual can have multiple tags. For certain contact types, tags can be used to add more specific information associated with the contact such as University Name, Business, Endowment/Foundation, or other tags of use to your Chapter.

w uth_Event v	
C () With Scholar or Scholar	
Group(s) Alum	lag(s) 2013 Members
	2014 Scholars ()
	Admin Aset
	APCS Light Awardee
	Arizona State University ()
	Atlanta Sunda Development Letter Tags
	Business
	Chapter Pocition
	Chapter Positions Masterlist ()
	Chapter Positions Masternat
	Endowment/Foundation
	Einst Vaar Scholar
	Guest Speaker
	Honorary ARCS Member 1
	Mail Awards Dinner Only (
	Matching Gift
	Member Without Email ()
	NB Member Masterlist
	NB Members Masterlist ()
	New Pittsburgh Member 2012-2013
	Non-Member 9
	Non-Member Named Award Donor 🖗
	Northern Arizona University 🕖
	Partner 🕖
	Pitt 🚱
	Potential Donor
	Potential Partner
	Press
	Private Foundation Ø
	Professional Affiliations 6
	Prospect
	Prospect

Other Information Related to Contacts

When viewing a contact in addition to the information outlined in the section above, you will see tabs that contain information related to the contact. As you see in the screen shot below there are tabs for Contributions, Pledges, Memberships, Events, Activites, Awards (Scholars only), Relationships, Groups, Notes and Tags. Relationships are explained below. See the sections for the other types for details on how to manage Memberships, Events, etc.



lome » CiviCRM » Civ	iCRM											
Sue Dintel	man											
Actions 🔌 📝 🛙	idit 🗍 🗊 Delete	Contact									< Prev	ious 🔷 Next
Summary Contri	butions 8 Pledges 0	Memberships 2	Events 8	Activities	196	Awards 0	Relati	onships 1	Groups 9	Notes 0	Tags 1	Change Log 22
Employer					т	lags		NB Membe	ers Masterlist			
Job Title					c	Contact Type		Individual				
Nickname					c	CiviCRM ID / U	lser ID	11157 / 1	.0			
Source					E	External ID						
Home Email	sue.dintelman@gmai	l.com			ŀ	Home Phone		801 560 3	587			
					N	Main Mobile		801 560 3	587			
						M						

Relationships

The **Relationships** tab is used to link a contact to other entities in the website. When entering new individuals, you may be most interested in linking them to their spouses. As a member becomes more involved in ARCS Foundation activities, you will use Relationships to track Chapter and National Board positions, as well as sponsoring scholar awards, etc. The following presents the basic steps of adding relationships to a contact record. When you click on **the Relationships** tab you will see a screen like the one below that lists relationships which are current and any that are currently inactive.

Sue Dintel	man					
Actions 👌 📝	Edit 🗍 🗘 Dela	ete Contact				<pre> Previous </pre>
Summary Contr	ibutions 8 Pledges	0 Memberships 2 E	events 8 Activities 1	96 Awards 0 Relation	ships 1 Groups 9 Notes	0 Tags 1 Change Log 2
• Add Relations	ship					
Current Relatio	nships					
Show 10 T en	tries				First	Previous 1 Next Las
Relationship	≜ ♦	Since 🗍 Positio	on City 🖶 Sta	ate/Prov Email	Phon	e 🛓
Spouse / Significant Othe of	er Dintelman, Bob			bob_dinte	man@msn.com	View Edit more)
Showing 1 to 1 o	of 1 entries rmissioned relation	iship. This contact c	an be viewed and u	pdated by the other.	First	Previous 1 Next Las
Inactive Relation	snips					
Inactive Relations	s are Disabled OR hav	ve a past End Date.				
Indicates a period	s are Disabled OR har tries	Since A Positi	n 着 City 着 Si	tate/Prov 📥 Email	First	Previous 1 Next Las
Indicates a pe Inactive Relations These relationships Show 10 • ent Relationship \$	s are Disabled OR have tries	ve a past End Date. Since 💂 Positio	on City 💠 S	tate/Prov 🔶 Email	First	Previous 1 Next Las
Inactive Relation These relationships Show 10 • en Relationship \$ ARCS Light of	s are Disabled OR has tries	ve a past End Date. Since Position July 1st, 2012	on ∳ City ∳ S Salt UT Lake City	tate/Prov ≑ Email utah@arc	First sfoundation.org	Previous 1 Next Las



To add a new relationship, click on the "Add Relationship" button. The following screen will pop up.

Add Relationship for	er Sue Dintelman
Relationship Type *	- select -
Contact(s) *	- first select relationship type - Q
Start Date	End Date
	If this relationship has start and/or end dates, specify them here.
Description	
Notes	
Permissions	Sue Dintelman can view and update information about selected contact(s).
	Selected contact(s) can view and update information about Sue Dintelman.
Enabled?	8

Use the drop down menu to select the relationship type of interest (e.g., Spouse/Significant Other of). As you enter the **Target Contact** information, the system will provide a drop down menu of options based on existing contact records. You may select from this list. If the contact does not exist in the system, a contact record must be created prior to completing the entry of the relationship. Note that you can start typing in either of the drop down fields to narrow the list of options.

🗘 Add Relationship fo	or Sue Dintelman
Relationship Type *	Spouse / Significant Other of
Contact(s) *	Bob Din Q
Start Date	Bob_dintelman@msn.com
Description	
Notes	
Permissions	Sue Dintelman can view and update information about selected contact(s).
Enabled?	 Selected contact(s) can view and update information about Sue Dintelman. Image: Selected contact(s)

Next, you can fill in the **Start Date** and **End Date** of the relationship, if appropriate. These fields are critical if entering Board Positions or Sponsorship relationships. **Description** and **Notes** are optional.



When you click on the "Save Relationship" button at the bottom of the screen, the entry will appear under Current Relationships below.



New Organization

To add a new organization, select **Contacts>>New Organization**. As with **Individual**, **Organization** is another contact type. The process of adding an organization is similar to adding an **Individual**, but there is less information to be completed with an organization. Note that the user can enter the organization's tax code number under **ARCS Organization Info**. Organizations can be tagged and added to groups just like individuals. For more details, see the <u>New</u> <u>Individual</u> section above.

You can use organization contact records for donors, corporate sponsors, universities, ARCS Chapters, etc. Using tags can help delineate between the organizational contacts for reporting purposes (i.e., Business, Endowment/Foundation).

Home » CiviCRM » CiviCRM			
New Organization			
*			Evened all taba
A Save + Save and New + Cancel			Expand an tabs
Content Date:			
Organization Name Legal Name	Nickname	SIC Code Contact Type	
			*
Email add	On Hold? <table-cell> Bulk Mailings? 😭</table-cell>		
Home v			
 Signature 			
Phone .	Phone Location Phone Type		
ext.	Home Phone F		
Add another Phone number Instant Messenger	IM Location IM Type		
	Home Y Yahoo Y		
Add another IM			
Open ID	Open ID Location		
	Home T		
Add another Open Id			
Website (2)	Website Type		
	Work 🗶 👻		
Add another website			
Source 🛿 External	ID <table-cell></table-cell>		
Browse/Upload Image ()			
Choose File No file chosen			
Check for Matching Contact(s)			
 ARCS Only Organization Information 			
Organization Information			
▶ Address			
Communication Preferences			
▶ Notes			
▶ Tags and Groups			
Save + Save and New × Cancel			

Access Keys:





New Activity

To add a new activity, select **Contacts>>New Activity**. This page is used for documenting interactions with contacts such as a phone call or a meeting. The user must enter their name and the activity type at bare minimum. All contacts to be included in the activity will be notified and have access to any of the details completed in the window below. Assigning an activity to a contact makes them the identified leader of the call or meeting. Attachments may be added and follow up meetings can be scheduled as well.

Home » CiviCRM	
New Activity	
V Save X Cancel	
Activity Type - select -	
Added By Dintelman, Sue * Q	
With Contact	
Assigned to 😢none - 🔍 🤇	
A copy of this activity will be emailed to each Assignee.	
Subject	
Date * 12/05/2016 Time 05:46PM *	
Duration minutes	
Activity Status * Scheduled	
	Source
B I U S × _z × ^e I _x I I I I I I I I I I I I I I I I I I I	
Styles - Format - Font - Size - A - O- ?	
	1
Priority *	
Normal V	
→ Attachment(s)	
▶ Repeat Activity	
→ Schedule Follow-up	
✓ Save × Cancel	
	Access Keys:



New Group

The assignment of proper groups and tags is critical. Groups are used for mailing lists and the assignment of permissions, and you can search/filter contacts based on groups and tags.

Add a New Group

To add a new group, select **Contacts>>New Group**.

When creating a new group, you have to indicate if it will be used for Access Control or as a **Mailing List**. Access Control is used to grant or restrict a group's permissions so that the group may use specific functionalities of the website. Access Control is assigned by the National Webmaster. Mailing lists are used by the mailing management function to send email blasts. Note that It is possible to define a group as both an Access Control and Mailing List group at the same time – this could be useful, if you need to send a mailing to members of a group that have permission to use specific functionalities of the website (e.g., Internal Data Admins, Internal Content Editors).

nter a unique name a	d a description for your new group here. Then click 'Continue' to find contacts to add to your new group.
Continue × Cance	
Name *	
Description	
	Group description is displayed when groups are listed in Profiles and Mailing List Subscribe forms.
Group Type	Access Control Mailing List 🛿
Visibility *	User and User Admin Only
Reserved Group?	If reserved, only users with 'administer reserved groups' permission can disable, delete, or change settings for this group. The reserve flag does NOT affect users ability to add or remove contacts from a group.
arent Groups 🛿	
Add Parent	- select group -
Continue X Cance	
	Access Keys

Mailing List groups may be set up in different ways depending on your Chapter needs. For example, in Atlanta the following types of member mailing groups have been set up: Actives, Associates, Honoraries, Board and Past Presidents. For each mailing the combination needed is selected to cover the intended audience... one advantage of this approach is that you don't have to make changes in many mailing groups if a member resigns, etc. In Phoenix, the member mailing groups are: General Member and Chapter Board. Other member groups are created as



needed for mailings (e.g., Member Dues not Paid). If your Chapter has members that routinely ask you to copy their assistants on ARCS Foundation emails, you may find it useful to create a **Mailing List** entitled "FYI Only for Administrative Assistants" and then include that list along with the others when sending emails.

Creating a Parent Group

If a group is very general or too large in size, you can create sub groups within the larger group. Some organizations find it useful to create a hierarchy of groups. To do this create one or more **Parent Groups** and then assign other groups to them. When a user sends a mailing to a **Parent Group**, or searches for contacts in a **Parent Group** - all contacts in the associated child groups are automatically included. EXAMPLE: An organization that has a National office and 5 regional offices puts constituents in each region into their own group. Then they create a "National" group, which is assigned as the "Parent" for all regional groups. The National office can now send mailings (for example) to the "National" group - knowing that all contacts in the regional groups will be included.

Smart Groups

Another way to create groups is through the use of various website **Search** capabilities. Whether you choose to find contacts, contributions, participants, or awards, once you have your search results, one of the options available in the **–actions-** drop down menu is **New Smart Group**. Once the group is created, go to **Contacts>>Manage Groups**, and click on **Settings** to the right of the newly created group, indicate it is a **Mailing List**, and Save. The benefit of smart groups is that they automatically update their contact lists based on the specified search criteria. For example, you can create a smart group consisting of all participants that have registered for an upcoming event. As additional participants register, the smart group will automatically add them to the mailing list. If you want to send reminders to people asking them to sign up, you can exclude this group from the mailings so that they aren't nagged about something they have already completed. Or, you can send additional details regarding the event to only those that have registered, not bothering those not planning to attend.

When setting up smart groups it is important to remember that they are for mailing list use only – not access control. The smart groups can do automatic updates based on the access group memberships, but access control group memberships do not update based on smart group memberships.

Manage Groups

To manage groups select **Contacts>>Manage Groups.** Here you can perform a variety of functions such as view contacts, remove contact(s) from a group, change group type, export contacts, disable a group and more by selecting **Contacts, Settings,** and/or **more**. See red box below. Be careful not to delete any access control groups, and when adding new members, remember to add them to the appropriate access control groups. To sort the groups by type, click on the Group Type column heading. Clicking again will reverse the order. You can also filter by Group Type if you only want to see Mailing Lists, for instance.



Home » CiviCRM					
Manage Groups					-
• Add Group					
Use Groups to organize contacts (e.g. these contacts are part of our 'Steering Committee'). You can also create 'smart' groups based on contact characteristics (e.g. this group consists of all people in our database who live in a specific locality). 🕄					
Find Groups					
Find	Created By	Type	Visibility	/	Status
Complete OR partial group name.	Complete OR partial cre	List Filter search by group type	(s). Filter sea	visibility - arch by visibility.	Disabled
Search	name.				
Shou 25 I entries					Update Smart Group Counts 👔
Name	Count Created	Description	Group	Visibility	st Previous 1 2 Next Last
÷	∲Вγ		Type [†]	, ÷	
Utah Scholars (Smart Group)	0 Dintelman, Sue	All contacts with contact subtype Scholar	Mailing List	User and User Admin Only	Contacts Settings more >
uth_Additional Event Invitees	13	not general or honorary members; invite to events	Mailing List	User and User Admin Only	Contacts Settings more •
uth_addl invitees #2 to Mathew Might lecture	27	consists of new individuals that had been invited to the 2015 Scholar luncheon	Mailing List	User and User Admin Only	Contacts Settings more •
uth_Addl Invitees 2013 Scholar Awards Luncheon	7	stragglers	Mailing List	User and User Admin Only	Contacts Settings more •
uth_Addl invitees to Matthew Might lecture_05152016	5	1	Mailing List	User and User Admin Only	Contacts Settings more •
uth_addl invitees to NAM event registration_2014	5	1	Mailing List	User and User Admin Only	Contacts Settings more •
uth_addl invitees_Scholar	7	1	Mailing List	User and	Contacts Settings more

Remove Contacts from a Group

One method to remove individual(s) from a group is to open the Group from the **Contacts>>Manage Groups** menu option. Check the box in front of the individual(s) you would like to remove, then select the **Actions** drop down menu. When you scroll down you will be given a choice to **Remove Contacts from Group**.

A second method to remove a contact from a group is to choose **Contacts>>Manage Groups** click on **Contacts**, then click on **Edit** to the right of the name of the contact you wish to remove. From the contact card click on **TAGS AND GROUPS** tab and click the **X** by the group you no longer want the individual in.

A third method to remove an individual from a group is to search and find the individual's contact record, click on the **Groups** tab and remove the group from the individual's contact record.

Important Note: Don't "Delete Contact", do "Remove Contact". If you click Manage Groups, then click on Contacts to the right of a Group name, and then click on more>>Delete Contact to



the right of a contact's name, you will <u>delete</u> the entire contact record for that individual and will have to go to **Advanced Search** to restore the individual contact record from trash. Deleting a contact is different from removing the contact from the group.

Add Contacts to a Group

In order to add contacts to a group you need to first identify the individuals you would like to add to a group. You can do this by either using the Manage Contacts>> Search function and selecting Add Contacts to Group from the Actions drop down menu, or by going to the individual contact records and selecting the Groups tab or the TAGS tab and adding the contact to the group/tag of interest.

Editing Smart Group Search Criteria

If you have created Smart Groups, they are clearly indicated in the **Manage Groups** list (see red arrow below) as "Smart Groups."

Home » CiviCRM				
Manage Groups				A
• Add Group				-
Use Groups to organize contact characteristics (e.g. this group	ts (e.g. these contacts consists of all people	are part of our 'Steering Committee' n our database who live in a specific). You can also create 'smart' ; locality). 😧	groups based on contact
Find Groups				
Find Complete OR partial group name.	Created By Complete OR partial c name.	Type Access Control M. List Filter search by group type	visibility - any visibility - (s). Visibility - any visibility - any visibility	Status Enabled Disabled
how 25 T entries				Update Smart Group Counts (irst Previous 1 2 Next Last
Name 🔺	County Created By	Description	Group Type	•
Utah Scholars (Smart Group)	0 Dintelmar Sue	 All contacts with contact subtype Scholar 	Mailing List User and User Admin Only	Contacts Settings more
uth_Additional Event Invitees	13	not general or honorary members; invite to events	Mailing List User and User Admin Only	Contacts Settings more
uth_addl invitees #2 to Mathew Might lecture	27	consists of new individuals that had been invited to the 2015 Scholar luncheon	Mailing List User and User Admin Only	Contacts Settings more
uth_Addl Invitees 2013 Scholar Awards Luncheon	7	stragglers	Mailing List User and User Admin Only	Contacts Settings more ►

In order to edit the criteria used to create the Smart Group, click on **Contacts** for the Group of interest. Just under the title **Contacts in Group:** you will see the **Edit Smart Group Search Criteria** button.

Home » CiviCRM » CiviC	RM	
Contacts in Gro	up: Utah Scholars	<u>.</u>
🖌 Edit Smart Grou	p Search Criteria for Utah Scholars	
• Add Contacts to	Utah Scholars 🕴	
• Find Contacts	within this Group	
23 Contacts	Group(s) In Utah Scholars <i>AND</i> Group Status "Added"	» Advanced Search
Select Records:	 All 23 records Ø 23 Selected records only 	Ŭ
Actions	•	

Clicking on that box brings up the "Advanced Search" screen. With another opportunity to click on "Edit ... Smart Group Criteria."

Home » CiviCRM » CiviCRM » CiviCR	RM							
Advanced Search								
• Edit Utah Scholars Smart Group Criteria <table-cell></table-cell>								
Utah Scholars (smart gro 23 Contacts	OUD) - Contact Type IN 'I Contact Subtype L	Individual' <i>AND</i> Like Scholar		» Search B	uilder			
Select Records:	All 23 records	I Selected record	rds only					
Actions	Ŧ							
ABCDEFGH	HIJKLMNO	PQRST	U V W X Y Z AII					
X Reset all selections								
Name Ado	dress 🗍 City	State 🗍 Posta	l Country Email	Phone Action				
🔲 🔓 Bareiss, Daman			daman.bareiss@	. View Edit me	ore 🕨			
Bauer, Jennifer Salary 151 Roa	16 Meadowmoor Holladay ad	UT 84117	United bauerjennifera States	View Edit me	ore 🕨			
Erickson, Philip 263	30 E Stringham Salt Lake e City	UT 84109	United philiperickson States	View Edit mo	ore 🕨			

Clicking on **Edit ... Smart Group Criteria**, will open the Advanced Search page so that you can modify the search.

Manage Tags

Adding and Deleting Tags

If you need to add, delete or otherwise edit tags, please contact is.help@arcsfoundation.org.

Removing Tags

To remove tags from an individual(s) contact record, select Search>>Find Contacts and select the contacts you are interested in. Select the radio button Selected records only, check the box in front of the individual(s) you would like to remove tags from, then select Untag Contacts (remove tags) from the Actions drop down menu. This brings up the list of Tags. Select the tag to remove and click "Remove Tags from Contacts. You can choose more than one tag at a time to remove.

A second method to remove a tag is to search and find the individual's contact record, click **Edit** and open **the TAGS AND GROUPS** section and uncheck the Tag box you no longer want.

A third method to remove a tag is to search and find the individual's contact record, click on the **Tags** tab and uncheck the tag box you no longer want.