ARCS® Foundation, Inc.

Achievement Rewards for College Scientists, Inc.

ARCS Foundation Website:

Contact Management

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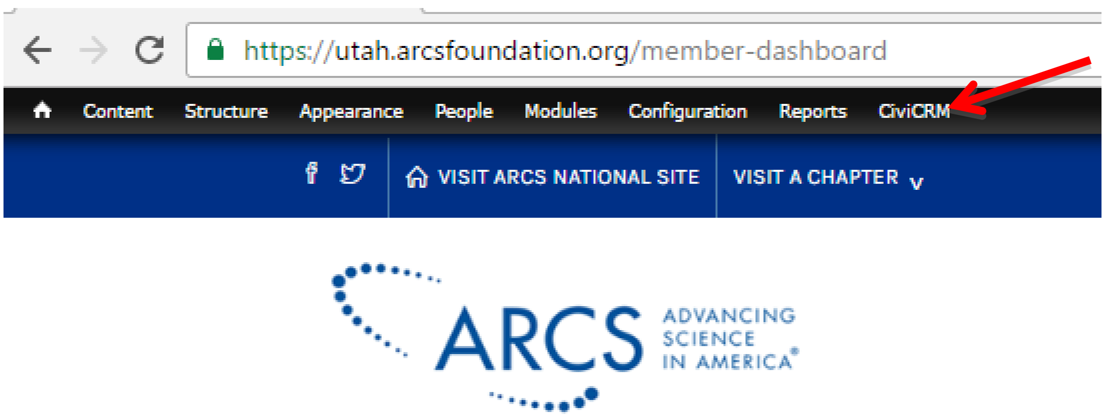
Manage Contacts

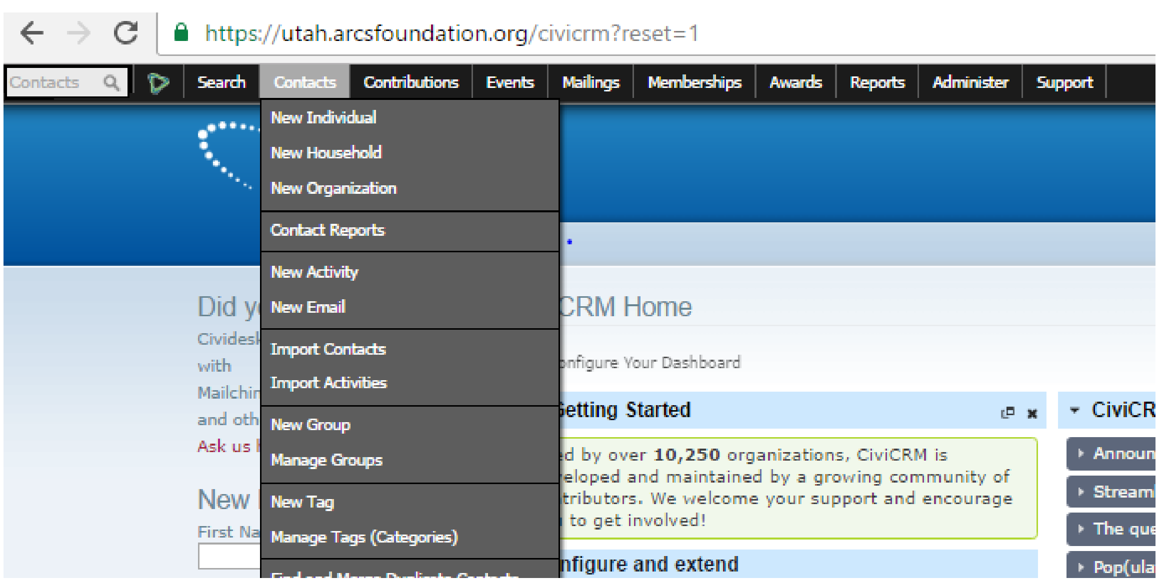
On the ARCS Foundation website all the ARCS members, scholars, donors, chapters, organzations, etc., are managed as CiviCRM contacts. There is one contact record per person or organization. The following section describes how to create new contacts (members, scholars, organizations, etc.)

New Individual

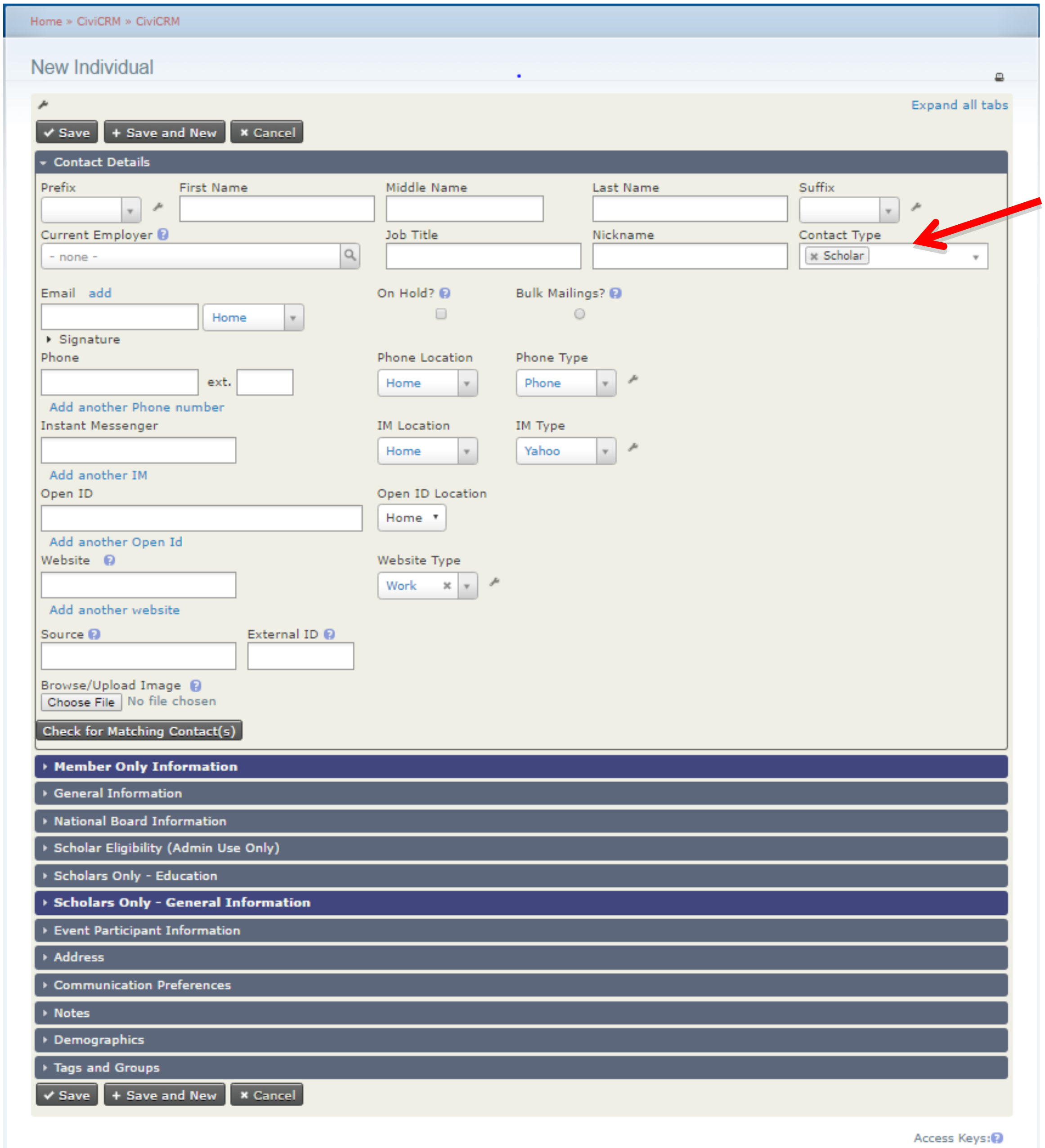
The easiest way to create a contact record in the CiviCRM database is to login into your Chapter secure site, switch to the CiviCRM menu by clicking on CiviCRM in the black menu bar at the top of the screen.



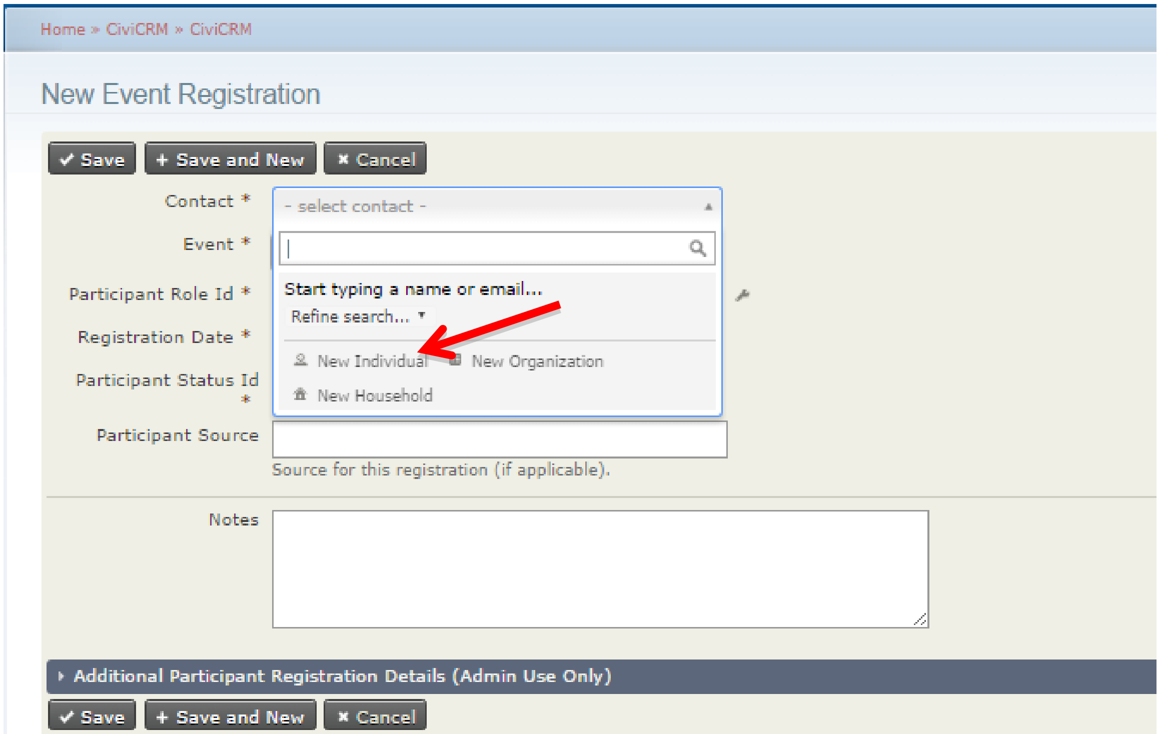
Then go to **Contacts>>New Individual**.



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.)



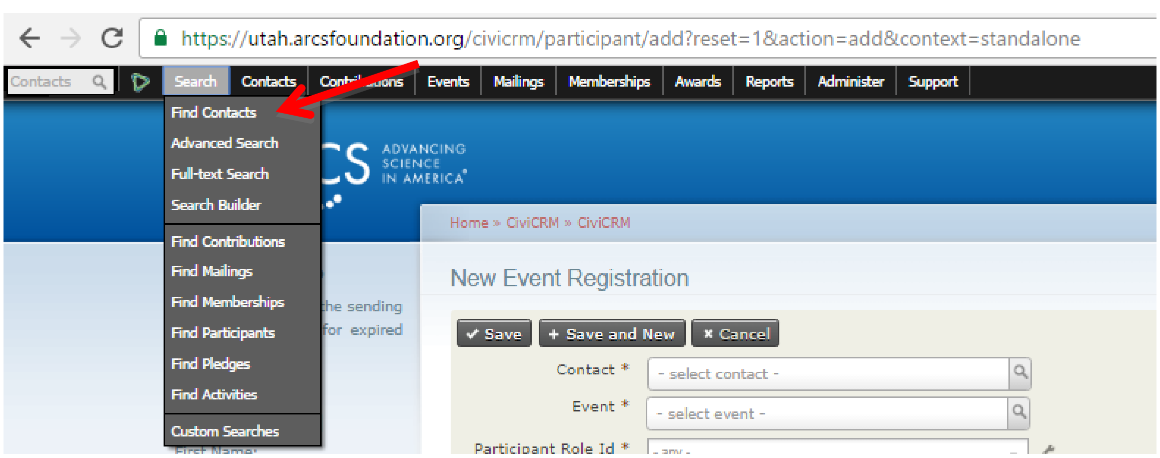
Depending on what you are working on within the website, you may encounter some other pages where you will also be able to enter a new individual. For example, if you go to **Events>>Register Event Participant**, you can add a new individual by selecting "New Individual" from the "Contact" drop down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



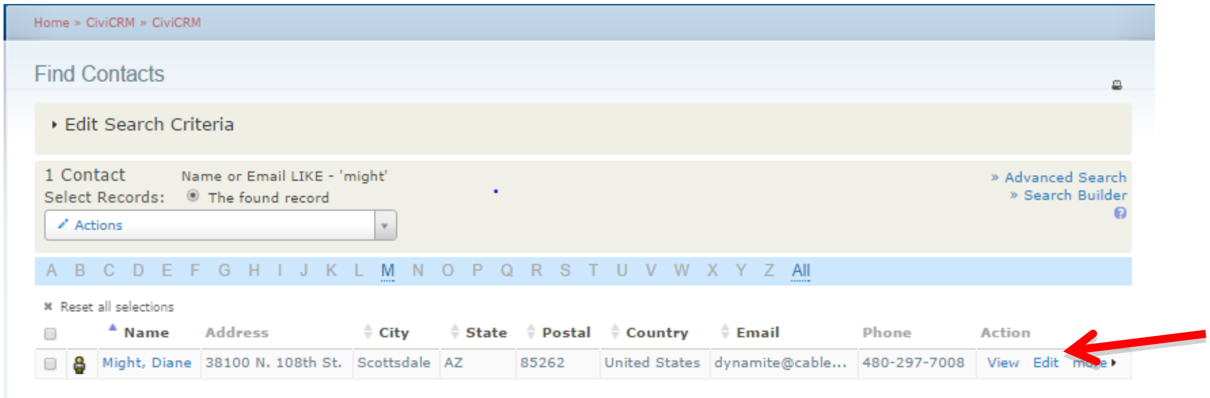
Note: Not all contacts entered under **Manage Contacts** can sign in to the website. If you want a contact to have access, in addition to creating a new scholar or member CiviCRM contact record, you need to create a Drupal user account. For more information, refer to the **Add a User Account** section.

Contact Details

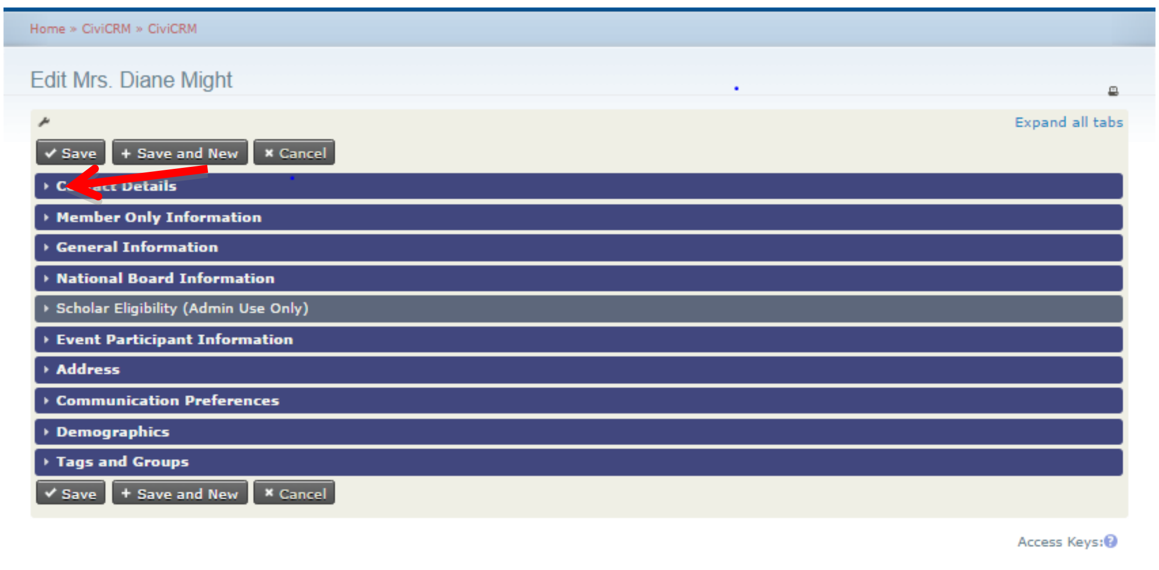
Whether you are entering a new individual into the database or updating the contact record of an individual that is already in the database, you will find most fields in this section self-explanatory, with a few exceptions. If an individual is already in the database, search and find the individual's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



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



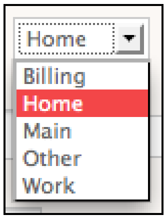
The contact record contains several different sections which can be opened or closed by clicking on the right pointing arrow before each heading.



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

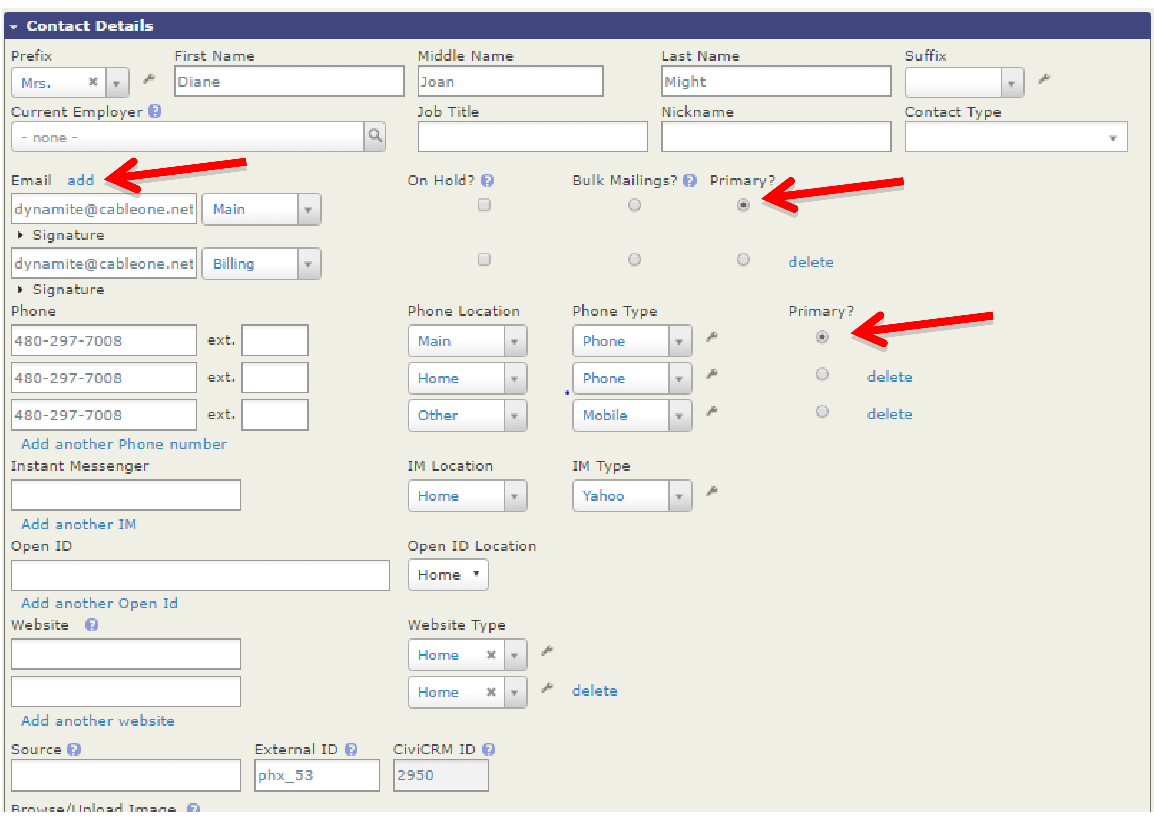
A contact may have multiple contact points for **Email, Phone, Instant Messenger, Open ID,** or **Website.** To add an additional contact point for any of these fields, click **add** just to the right of the field name (see red arrow to left in screenshot below). For multiple emails and phone numbers,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



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 [IS Committee,](IS Committee) if you need different contact information to populate **My Profile.** **Is this still true?**

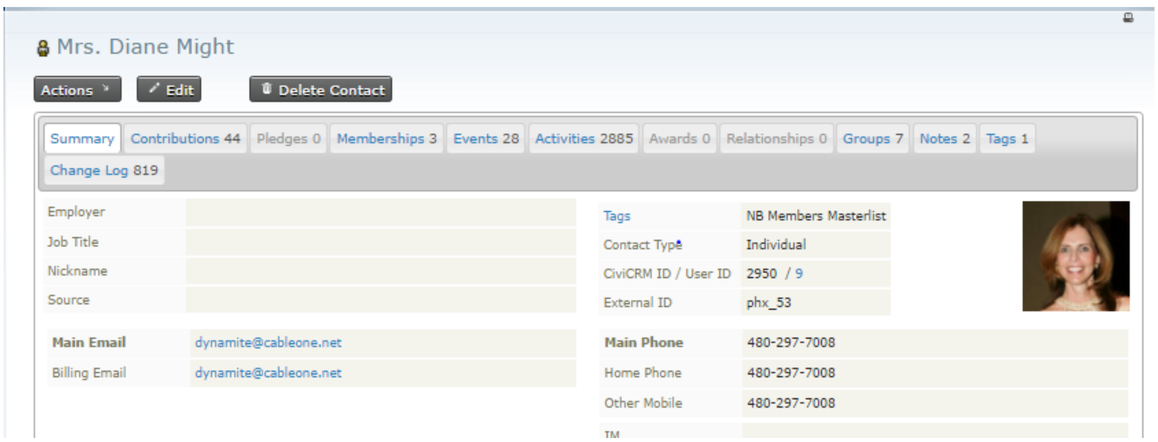


The **SIGNATURE** link allows you to save a closing that will appear in all sent emails (name, email, phone #, etc.). The **On Hold?** box above is most commonly used to mark an email address that is bouncing. If you are using the CiviMail component, emails that bounce excessively are automatically placed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



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 Information

Member Founding/Charter: Select

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
- [ ] Directory
- [ ] Education: Field Trips and Retreats
- [ ] Endowment Fund
- [ ] Funds Development
- [ ] Membership
- [ ] New Member Mentors
- [ ] Newsletter
- [ ] Public Relations
- [ ] Scholars Luncheon
- [ ] Speakers Bureau
- [ ] Twenty-Fifth Anniversary
- [ ] University Relations
- [ ] Website
- [ ] Willing to Chair a Committee

ILLINOIS COMMITTEES: Please check all areas of interest:
- [ ] Data Management and Website
- [ ] Fundraising and Development
- [ ] Marketing and Communications
- [ ] Membership
- [ ] Programs and Events
- [ ] Scholar Outreach
- [ ] Scholar Award Luncheon
- [ ] University Relations

Oregon Member Participation:
- [ ] COMMUNICATIONS: Learn to create a MailChimp email, post articles on the website; write and help produce the Annual Report or the newsletter; be an event photographer.
- [ ] FINANCE: Monitor the Chapter's finances; make recommendations for and track investments, monitor investment manager; develop financial policies and procedures.
- [ ] FUND DEVELOPMENT: Introduce corporations or foundations to ARCS; assist in grant writing; plan stweardship opportunities for donors; identify potential donors; mabe learn to make "the ask."
- [ ] GOVERNANCE: Ensure the organizational structure of the Chapter by developing, monitoring, and revising the legal and financial documents. Examine overall chapter structures to guarantee the health of the Chapter.
- [ ] HOSTING: Host a gathering in your home, planned, catered and paid for by the Chapter.
- [ ] MEMBER RELATIONS: Identify potential members; coordinate new member orientations; plan the all member Summer Party; greet members at events.
- [ ] PROGRAM: Plan ARCS programs; suggest and help secure speakers; attend program events and greet attendees.
- [ ] SCHOLAR RELATIONS: Plan orientations for first-year scholars at OHSU, OSU, or UO; plan the Scholar Picnic; organize Celebrate the Scholars event for third-year scholars; arrange scholar lab tours.
- [ ] SCHOLAR AWARDS LUNCHEON: Plan the SAL by serving on the committee; volunteer at the event; develop the PowerPoint presentation; coordinate invitation and program production; assist with securing underwriting; address invitations; write thank you notes.
- [ ] UNIVERSITY RELATIONS: Participate in scholar orientations; serve as a liaison to OHSU, OSU or UO; track scholar data.

Committee Interest:
- [ ] Annual Scholar Award Event
- [ ] Communications
- [ ] Event Planning/Management
- [ ] Finance
- [ ] Fund Development
- [ ] Fundraising Events/Benefits
- [ ] Governance/Policy
- [ ] Hospitality
- [ ] Member Relations
- [ ] Nominating
- [ ] Printing
- [ ] Programs/Education/Field Trips
- [ ] Publications/Newsletter
- [ ] Public Relations
- [ ] Scholar Relations/Outreach
- [ ] Special Events
- [ ] University Relations
- [x] Website/Computer

Skills and Interests:
- [ ] Accounting/Budget Planning/Finance
- [ ] Art/Graphics
- [ ] Communications
- [ ] Community Connections
- [ ] Database Management
- [ ] Desktop Publishing
- [ ] Event Planning/Management
- [ ] Floral Design/Flavors/Decoration
- [ ] Fundraising
- [ ] Legal
- [ ] Marketing/Public Relations
- [ ] Photography
- [ ] Publishing/Printing
- [ ] Sales
- [ ] Special Events
- [ ] Strategic Planning
- [x] Website/Computer
- [ ] Writing/Editing/Proofreading

Current or Prior Volunteer Activities and Offices Held:

Education: B.A. Chemistry Boston Univ

Organization(s) I am affiliated with:

Employer Matching Funds: ( ) Yes ( ) No

Suggestion for Future Programs and New Members:

Please indicate if you plan to present a motion at the next board meeting. All motions should be discussed in advance with the Chapter President allowing sufficient time for circulation to the Board Members at least one week prior to the meeting.

Presenting Motion(s)? ( ) Yes ( ) No

Reporting Chapter ID: 784

Reporting Chapter: Phoenix

General Information

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


General Information

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?	Yes No

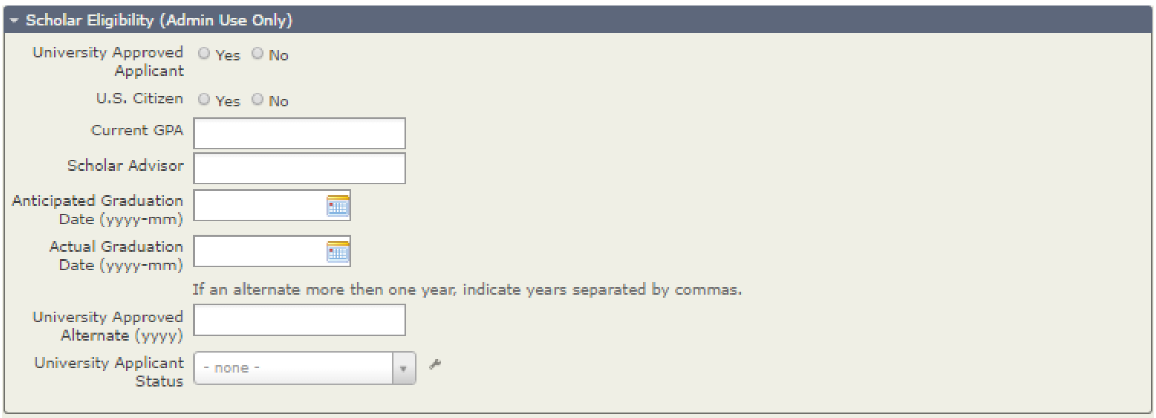
Although you can note a **Spouse or Significant Other** on this page, you should create a contact record for the spouse and create a **Spouse** relationship between the two contact records. More information about entering **Relationships** can be found later in this document. Other fields that a Chapter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

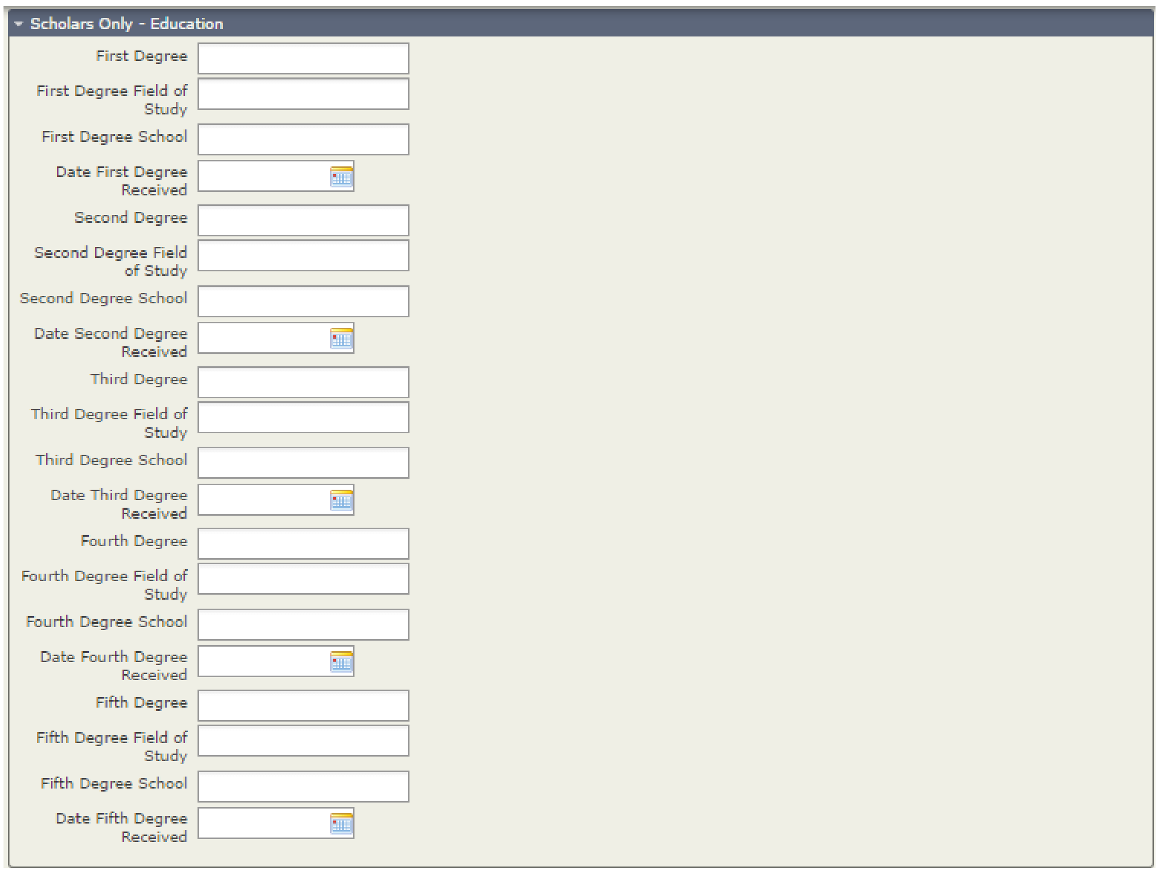
Scholar Eligibility (Admin Use Only)

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



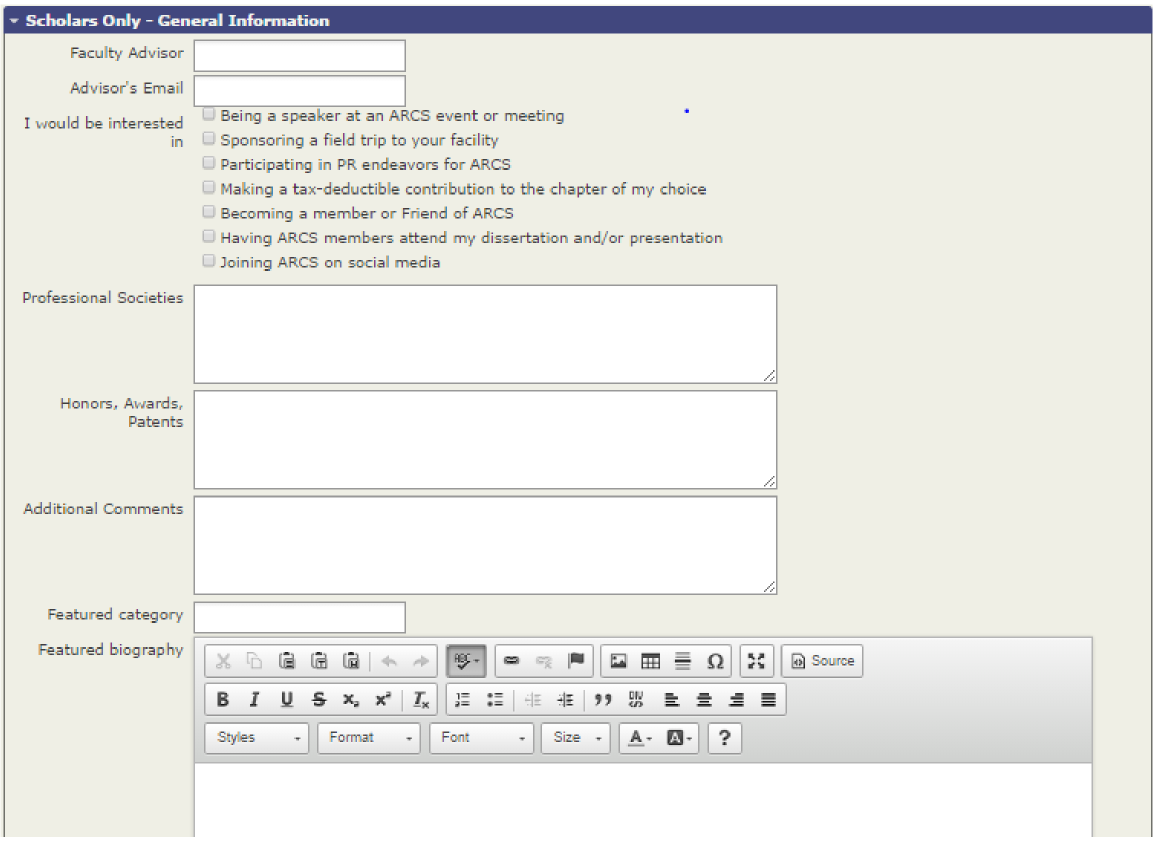
Scholars Only - Education

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 – General Information

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

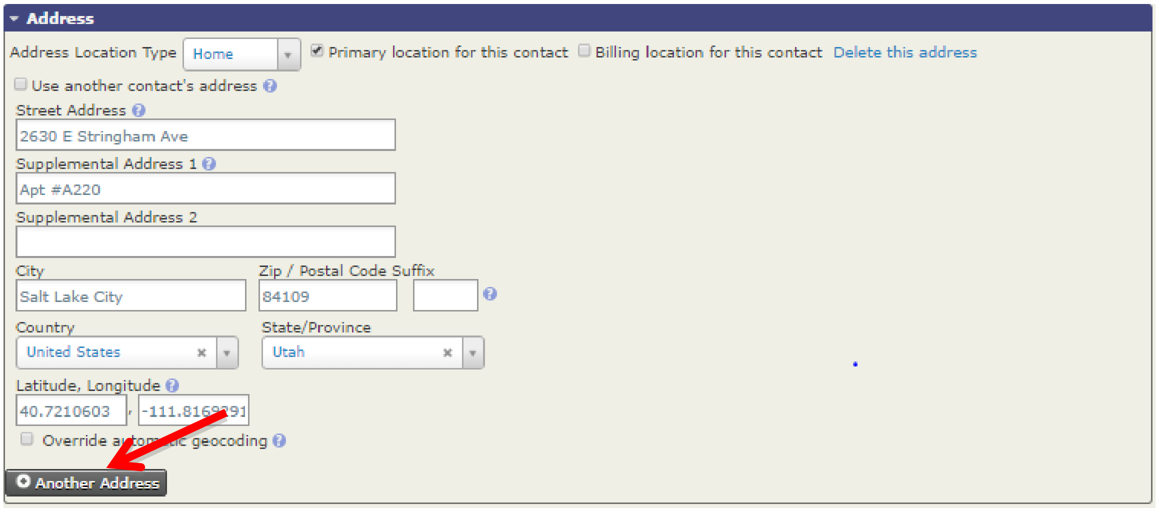


Event Participation

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 is.help@arcsfoundation.org for help in adding custom fields to events.

Address

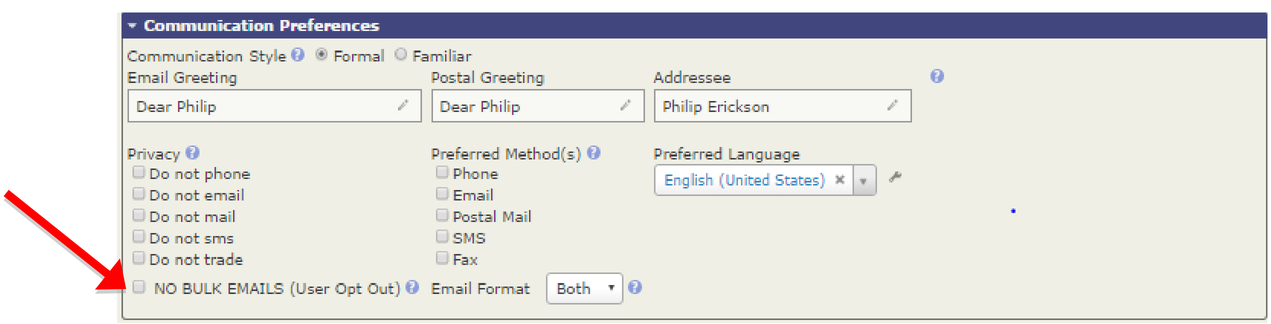
Contacts may have several **Location Types** (work, home, other, etc.). Select the **Location Type** from the drop down menu. Click whether or not this is the **Primary location for this contact** or **Billing location for this contact**. To add another address, click **Another Address** at the bottom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



Communication Preferences

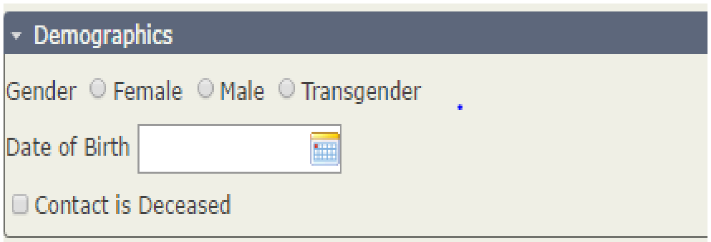
Use the **Email and Postal Greeting** drop down menus to determine salutations. Use the **Addressee** drop down menu for mailing labels. For greetings and addressee, you can select one of the standard formats based on token values (i.e. fields noted directly on the contact record) <u>or</u> you can customize 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.



Demographics

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



Note: This is where you can indicate when a member is deceased. Be sure to remove any Groups and Tags from the deceased member.

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 New Group, Manage Groups, New Tags, and Manage Tags 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.

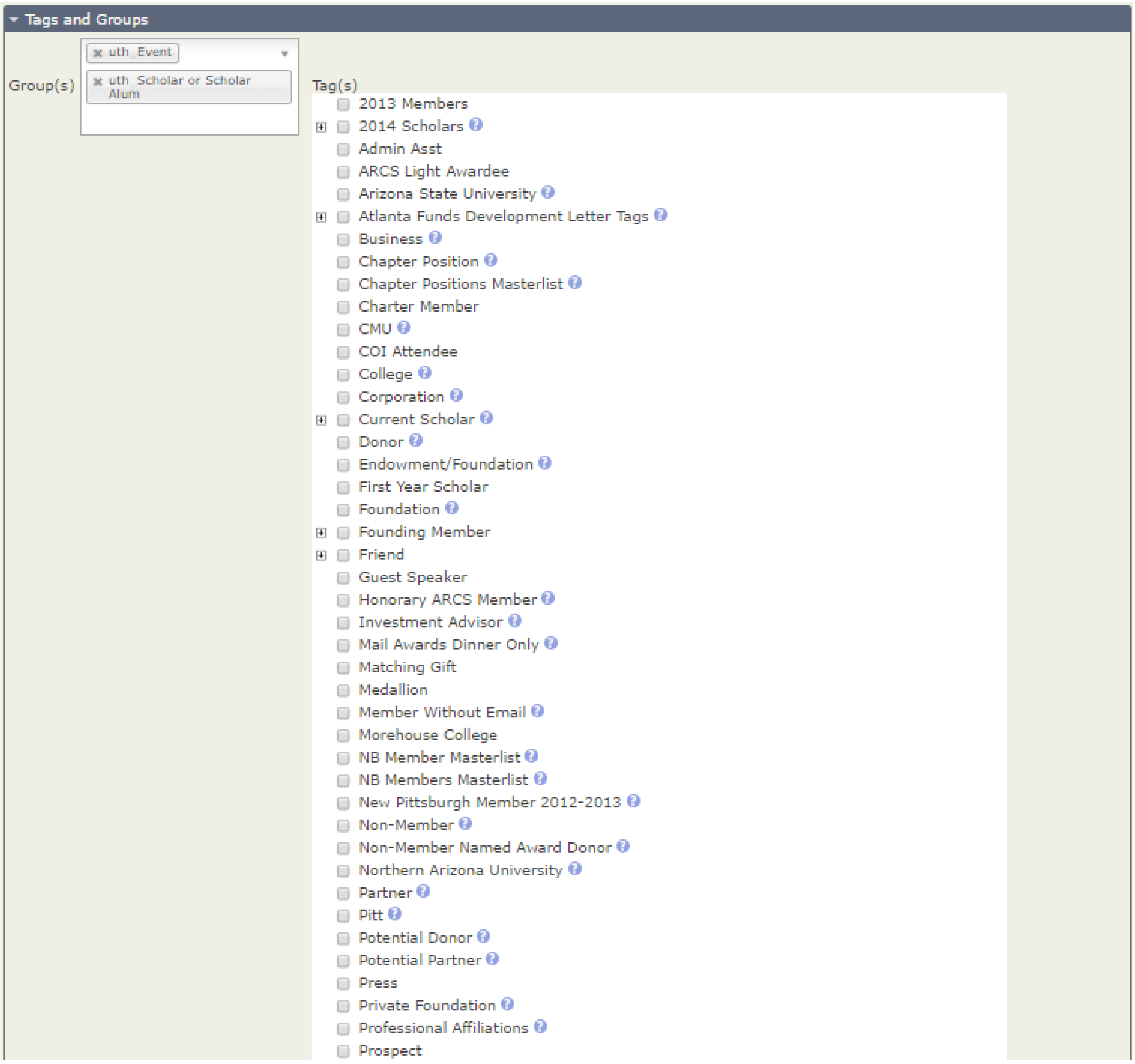
Use the **X** in front of a group name to delete the contact from the group. To add the contact to a group, click on the down arrow at the top right hand side of the "Group" box (as indicated by the red arrow below) and select the group from the list. Note that all members must be in the **General Member**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

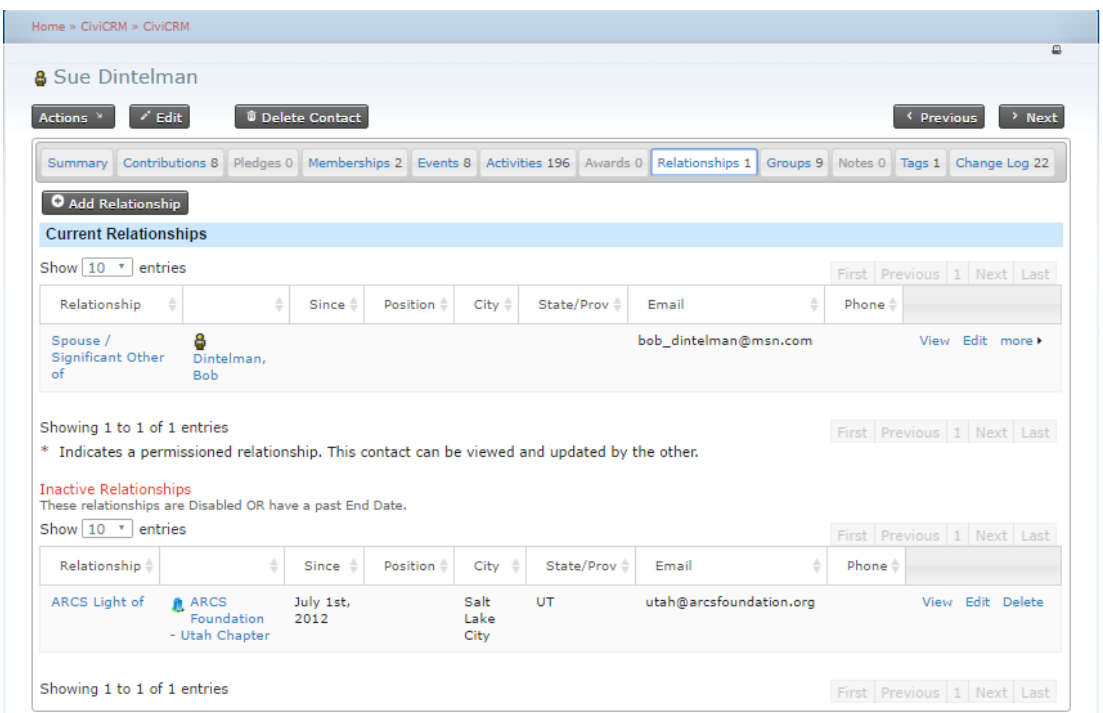


Other Information Related to Contacts

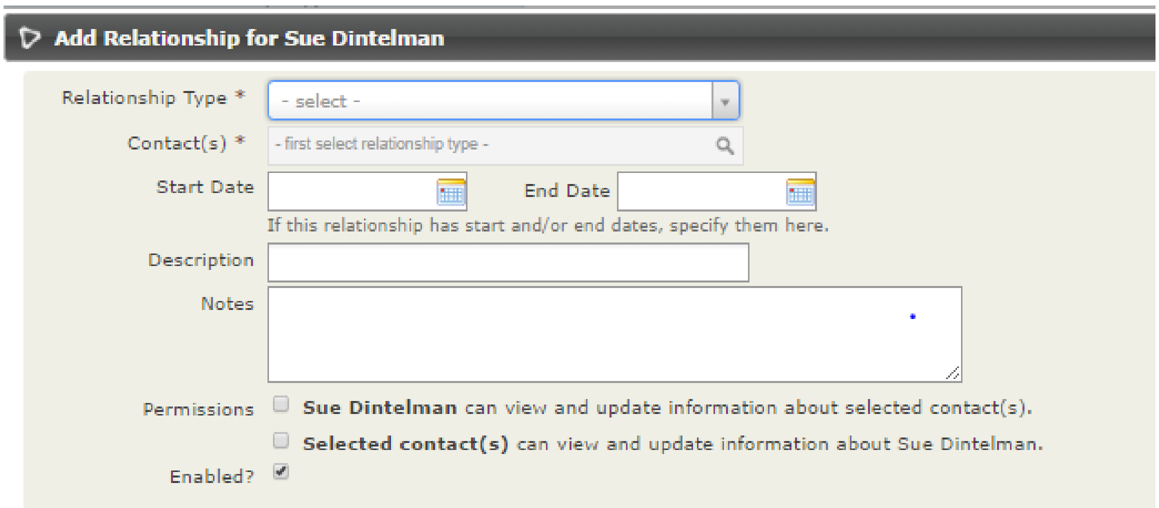
When viewing a contact in addition to the information outlined in the section above, you will see tabs that contain information related to the contact. As you see in the screen shot below there are tabs for Contributions, Pledges, Memberships, Events, Activites, Awards (Scholars only), Relationships,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

Relationships

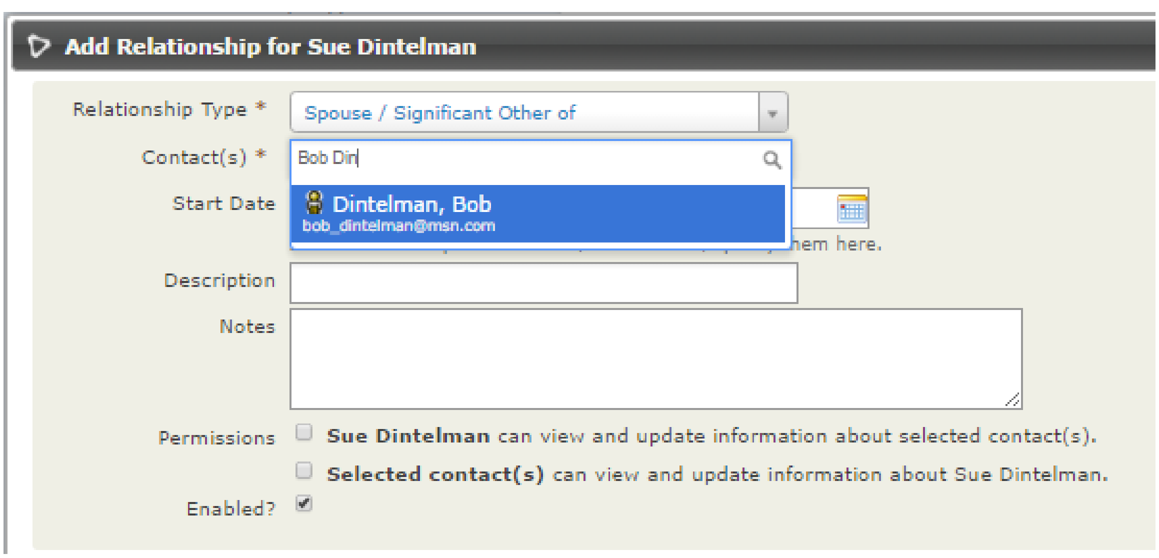
The **Relationships** tab is used to link a contact to other entities in the website. When entering new individuals, you may be most interested in linking them to their spouses. As a member becomes more involved in ARCS Foundation activities, you will use Relationships to track Chapter and National Board 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.



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



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.



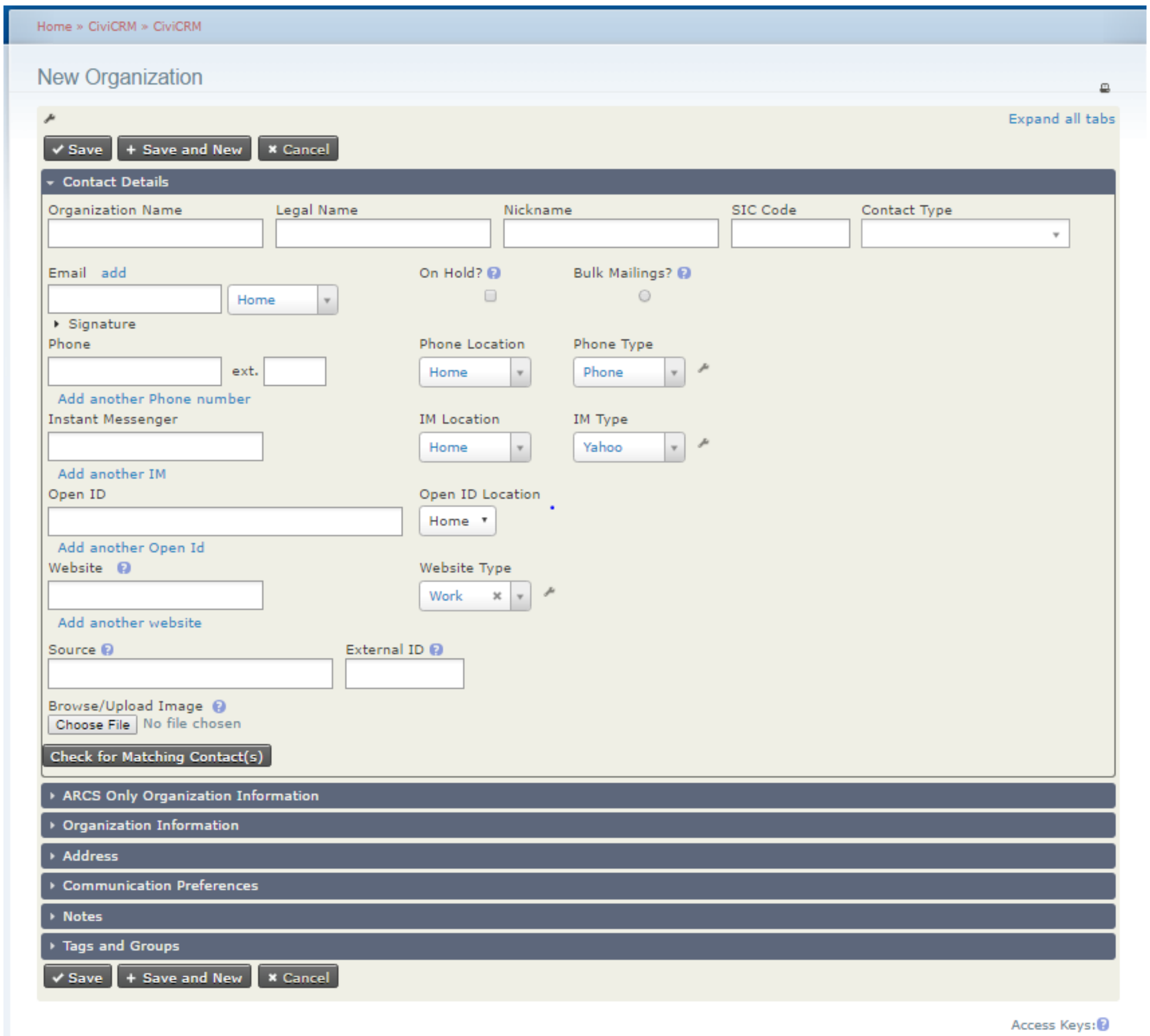
Next, you can fill in the **Start Date** and **End Date** of the relationship, if appropriate. These fields are critical if entering Board Positions or Sponsorship relationships. **Description** and **Notes** are optional.

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

New Organization

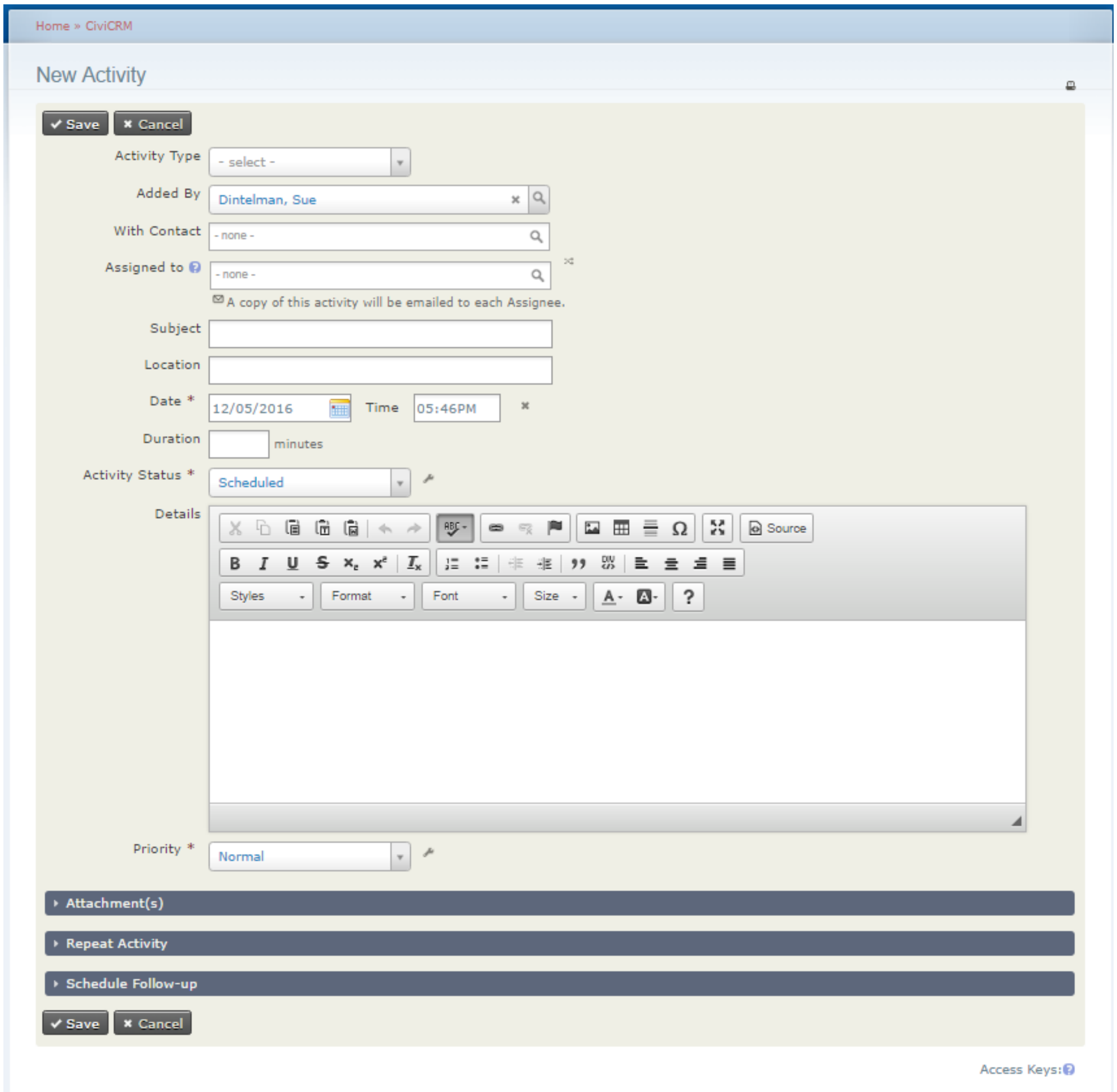
To add a new organization, select **Contacts>>New Organization**. As with **Individual**, **Organization** is another contact type. The process of adding an organization is similar to adding an **Individual**, but there is less information to be completed with an organization. Note that the user can 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 [New Individual]() 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).



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.



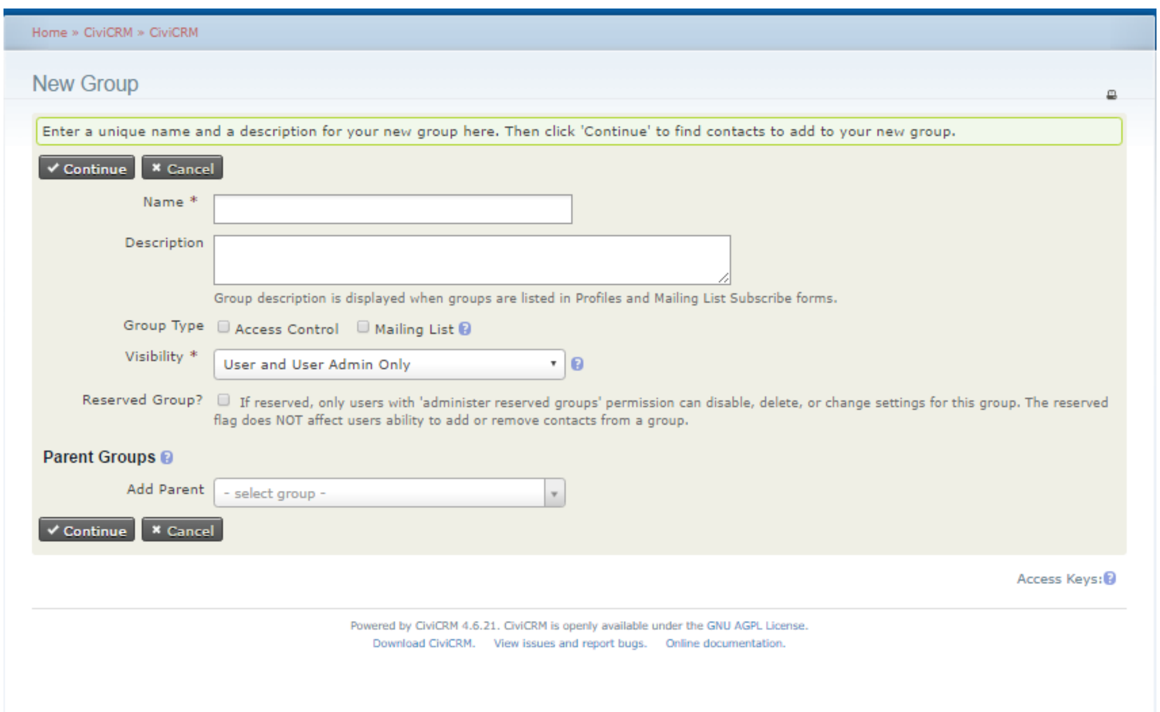
New Group

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).



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.

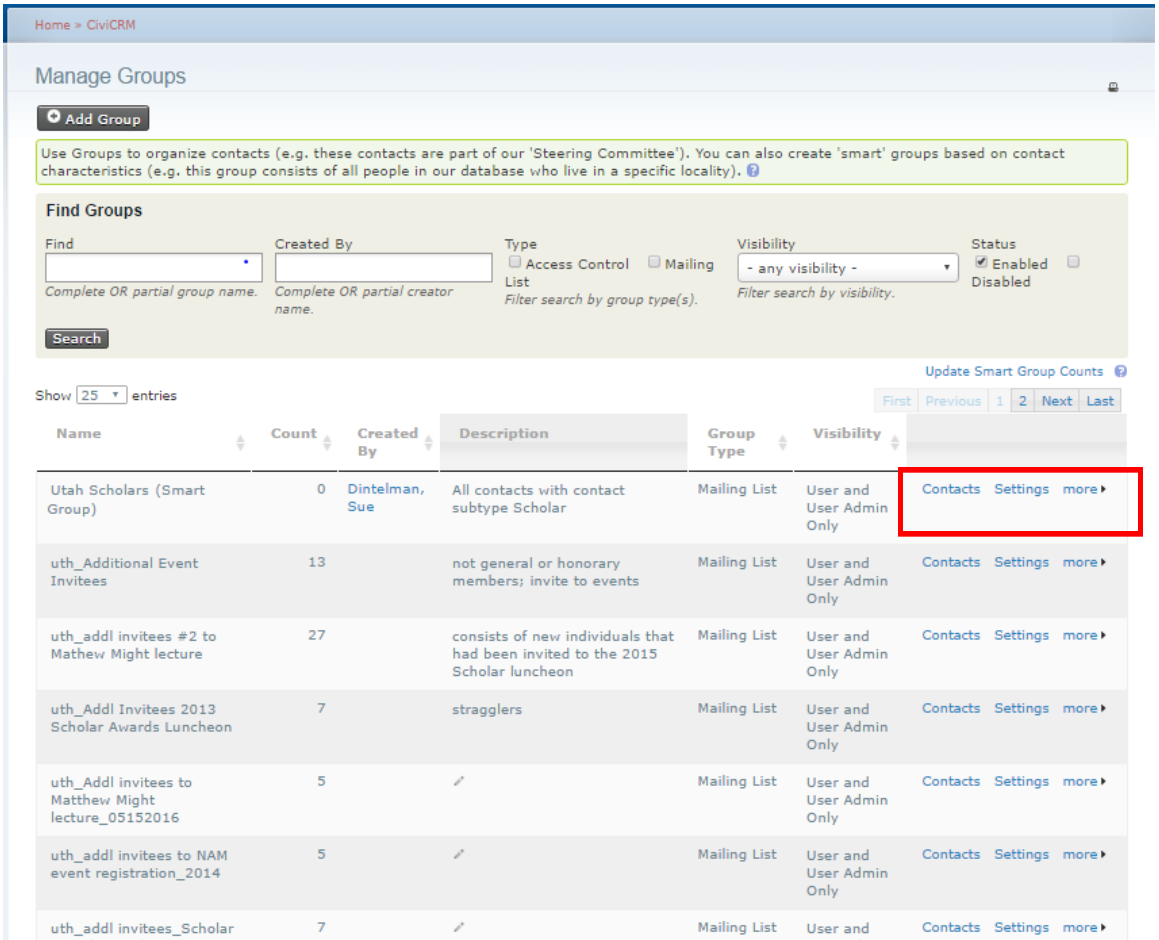
Smart Groups

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.



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.

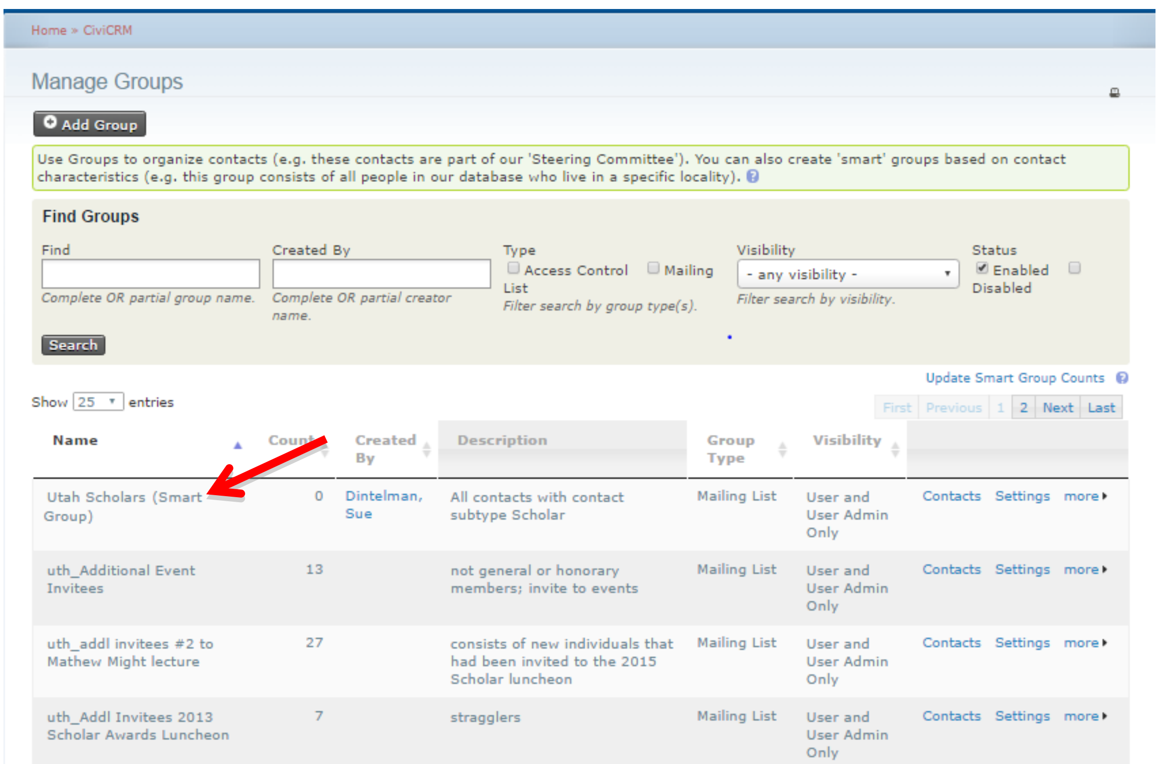
Important Note: Don't "Delete Contact", do "Remove Contact". If you click **Manage Groups,** then click on **Contacts** to the right of a Group name, and then click on **more>>Delete Contact** to the right of a contact's name, you will delete the entire contact record for that individual and will have 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

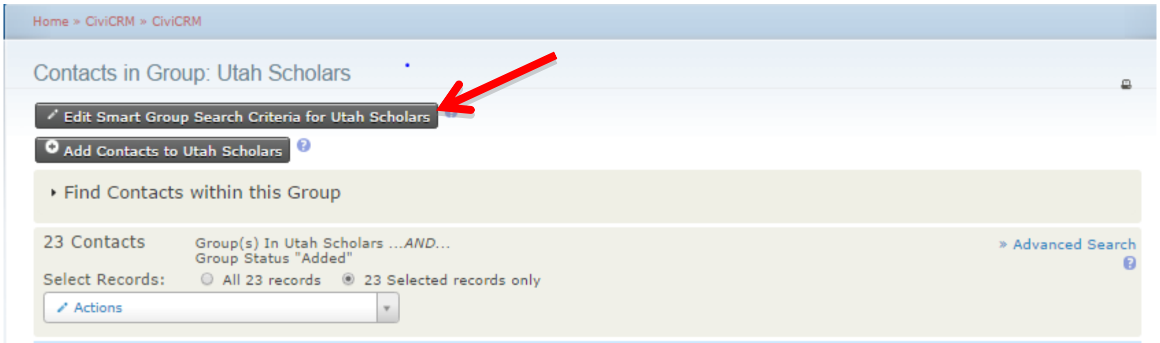
In order to add contacts to a group you need to first identify the individuals you would like to add to a group. You can do this by either using the **Manage Contacts>> Search** function and selecting **Add Contacts to Group** from the **Actions** drop down menu, or by going to the individual contact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

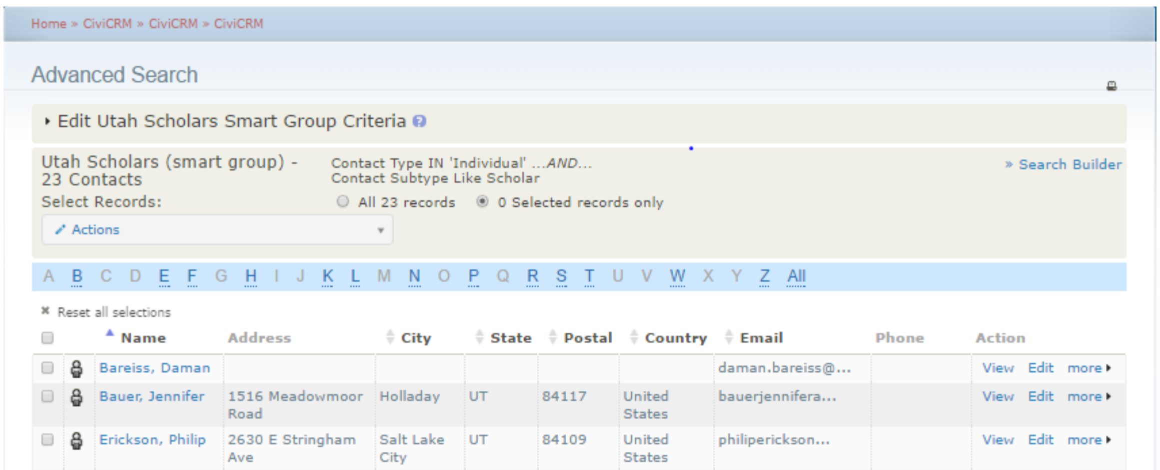
If you have created Smart Groups, they are clearly indicated in the **Manage Groups** list (see red arrow below) as "Smart Groups."



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.



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



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.