

CiviCRM

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Introduction to CiviCRM

CiviCRM - What is it and Why?

CiviCRM is a fully open-source CRM (**C**onstituent **R**elationship **M**anagement) used by organizations across the globe. It's highly customizable to individual organizations needs, and rarely does one CRM look like another. Their purpose is to be a fully integrated way to track continuous engagements with individuals and organizations, connecting disparate threads into a more unified picture. You can classify contacts by their interests, send mail to specific individuals/groups, create event invitations, and more, all of which together are unified. With that you can see for ANY individual when they signed up for a newsletter, what events they've attended, what forms they've filled out etc.

CiviCRM has a really wide array of tools, but because of its particularities, there's a number of engagements and outreach that is not tied into the CRM. Jotform for example is quick and easy.....

What is it NOT?

Curriculum

Curriculum

Registration Portal

<https://www.wizardshot.com/embed/tutorials/49427-tutorial-1772743153341>

Events

As always, there are multiple ways to do things in CiviCRM. This guide presents a more involved means of creating an event, with full extensibility.

Getting Started

To have the most painless experience, it's best to have the following pieces of information locked-in before launching the event registration.

- Title of the event
- Description of the event
- Date/time, and location of the event
- Additional questions you would like to ask registrants
- A launch post or webpage to link folks to

If you have all of these pieces of information, you're ready to go!

The Process

1. Create an event in CiviCRM
2. Configure registration form
3. Configure follow-up email
4. Create results table