CIVICRM

WHAT'S NEW IN 4.6

The 'Big Stuff'

- Repeating Events & Activities

- Sales Tax / VAT

- Invoices

- CiviMail Streamlining

- CiviMail A/B Testing

Repeating Activities

- Weekly Meetings / Tasks / etc.

Repeating Activities

Confirm dates

A recurring set will be created with the following dates.

#	Start date
Original	April 22nd, 2015 12:00 AM
2	April 29th, 2015 3:00 PM
3	May 6th, 2015 3:00 PM
4	May 13th, 2015 3:00 PM
5	May 20th, 2015 3:00 PM
6	May 27th, 2015 3:00 PM
7	June 3rd, 2015 3:00 PM
8	June 17th, 2015 3:00 PM
9	June 24th, 2015 3:00 PM
10	July 1st, 2015 3:00 PM

✓ Continue   ✕ Cancel

Repeating Events

- Recurring Courses / Meetups / etc.

Sales Tax / VAT / Invoicing

CiviContribute Component Settings

✓ Save   ✗ Cancel

☑ Enable Tax and Invoicing

Invoice Prefix
```
INV_
```
Enter prefix to be display on PDF for invoice

Credit Notes Prefix
```
CN_
```
Enter prefix to be display on PDF for credit notes.

Due Date
```
10
```

For transmission
```
Days ▼
```
Select the interval for due date.

Notes or Standard Terms

Enter note or message to be displayed on PDF invoice or credit notes

☐ Automatically email invoice when user purchases online

Tax Term
```
Sales Tax
```

Tax Display Settings
```
Show [tax term] inclusive price - i.e. $120.00 (includes [tax term] of $20.00) ▼
```

✓ Save   ✗ Cancel

Sales Tax / VAT

NAME			LED?			
Accounts Receivable				Edit	Disable	Delete
Deposit Bank Account				Edit	Disable	Delete
Payment Processor Account				Edit	Disable	Delete
Premiums inventory				Edit	Disable	Delete
Premiums				Edit	Disable	Delete
Banking Fees				Edit	Disable	Delete
Accounts Payable				Edit	Disable	Delete
No VAT Rate Account				Edit	Disable	Delete
VAT 0 Rate Account				Edit	Disable	Delete
VAT Full Rate Account				Edit	Disable	Delete
VAT Half Rate Account				Edit	Disable	Delete
Campaign Contribution				Edit	Disable	Delete
Discounts				Edit	Disable	Delete
Donation				Edit	Disable	Delete
Event Fee				Edit	Disable	Delete
Member Dues				Edit	Disable	Delete
No VAT Rate FinancialType				Edit	Disable	Delete
VAT 0 Rate FinancialType	VAT 0 Rate FinancialType	Revenue (INC)	No	No	Yes	Edit	Disable	Delete
VAT Full Rate FinancialType	VAT Full Rate FinancialType	Revenue (INC)	No	No	Yes	Edit	Disable	Delete

Financial Accounts

Name * `VAT Full Rate Account`

Description `Full VAT 20%`

Owner ❓ `Default Organization`

Use this field to indicate the organization that owns this account.

Financial Account Type * `Liability`

Accounting Code `2201`

Enter the corresponding account code used in your accounting system. This code will be available for contribution export, and included in accounting batch exports.

Account Type Code `VATFULL`

Enter an account type code for this account. Account type codes are required for QuickBooks integration and will be included in all accounting batch exports.

Tax-Deductible? ☐

Are monies received into this account tax-deductible?

Enabled? ☑

Is Tax? ☑

Does this account hold taxes collected?

Tax Rate `20`

The default rate used to calculate the taxes collected into this account (e.g. for tax rate of 8.27%, enter 8.27).

Default? ☐

Is this account to be used as the default account for its financial account type when associating financial accounts with financial types?

[Save] [Cancel]

Sales Tax / VAT

Financial Types ⊕

Financial types are used to categ...
Membership Dues. Additionally,

Each financial type relates to a n...

NAME	DES...
Campaign Contribution	✏
Donation	✏
Event Fee	✏
Member Dues	✏
No VAT Rate FinancialType	No V...
VAT 0 Rate FinancialType	VAT...
VAT Full Rate FinancialType	VAT...
VAT Half Rate FinancialType	VAT... Finan...

⊕ Add Financial Type

▷ VAT Full Rate FinancialType - Assigned Financial Accounts

⊕ Assign Account   ✎ Edit Financial Type

RELATIONSHIP	FINANCIAL ACCOUNT	ACCOUNTING CODE	ACCOUNT TYPE (CODE)	OWNED BY	IS ACTIVE?		
Accounts Receivable Account is	Accounts Receivable	1200	Asset (AR)	Default Organization	Yes	Edit	
Expense Account is	Banking Fees	5200	Expenses (EXP)	Default Organization	Yes	Edit	Delete
Cost of Sales Account is	Premiums	5100	Cost of Sales (COGS)	Default Organization	Yes	Edit	Delete
Income Account is	VAT Full Rate FinancialType		Revenue (INC)	Default Organization	Yes	Edit	Delete
Sales Tax Account is	VAT Full Rate Account	2201	Liability (VATFULL)	Default Organization	Yes	Edit	Delete

⊕ Assign Account   ✎ Edit Financial Type

Sales Tax / VAT

Fall Fundraiser Dinner

Fill in the information below to join as at this wonderful dinner event.

How many people are you registering? `1 ⏶⏷`

Fill in your registration information on this page. If you are registering additional people, you will be able to enter their registration information after you complete this page and click "Continue".

Your Registration Info

First Name *

Last Name *

Email Address *

Dinner Contribution *
- ⦿ **$ 60.00** Single (includes Sales Tax of $ 10.00)
- ◯ **$ 120.00** Couple (includes Sales Tax of $ 20.00)
- ◯ **$ 240.00** Family (includes Sales Tax of $ 40.00)

Sales Tax / VAT

Help Support CiviCRM!

Do you love CiviCRM? Do you use CiviCRM? Then please support CiviCRM and Contribute NOW by trying out our new online contribution features!

Contribution Amount

- ○ **Friend -** $ 1.20 (includes Sales Tax of $ 0.20)
- ○ **Supporter -** $ 6.00 (includes Sales Tax of $ 1.00)
- ● **Booster - $ 12.00 (includes Sales Tax of $ 2.00)**
- ○ **Sustainer -** $ 60.00 (includes Sales Tax of $ 10.00)
- ○ Other Amount

Other Amount $ [   ]

- ● I want to make a one-time contribution
- ○ I pledge to contribute this amount every [week ▲▼] for [   ] installments.

Sales Tax / VAT

Invoicing

Civimail Streamlining

Civimail Streamlining

Civimail Streamlining

Civimail Streamlining

Civimail Streamlining

√ 1. Content | √ 2. Options | » 3. Review

Review

Mailing Name	CiviMail May newsletter
Recipients	~18 recipients (**Include:** Newsletter Subscribers)
Content	HTML Plain Text
Tracking	✔Click Throughs ✔Opens
Responding	✘ ~~Track Replies~~ ✘ ~~Forward Replies~~ Opt-out Resubscribe Unsubscribe
Publication	Public Pages

✔ **Submit Mailing**

◄ Previous

🗑 Delete Draft   💾 Save Draft

Civimail Streamlining

Civimail Streamlining

Demo

CiviMail A / B Testing

| » 1. Setup | 2. Target | 3. Compose | 4. Schedule |

A/B testing allows you to send two test mailings to a random subset of your recipients. After collecting and comparing metrics, the more successful mailing will be sent to the remaining recipients.

Name* ❓ `Monthly newsletter`

Test Type 🔘 Test different "Subject" lines
⚪ Test different "From" lines
⚪ Test entirely different emails

▸ Next   🗑 Delete Draft   💾 Save Draft

CiviMail A / B Testing

Template | Sample CiviMail Newsletter Template

From* | "CiviCRM Team" <info@civicrm.org>

Subject (A)* | Sample CiviMail Newsletter A | ‹› Tokens

Subject (B)* | Sample CiviMail Newsletter B | ‹› Tokens

HTML

‹› Tokens

CIVICRM Your Newsletter Title

body

Plain Text

Preview (A)

Preview as HTML
Preview as Plain Text

Send test email to:
kurund@civicrm.org
✉ Send test

Send test email to group:
☑ Select Group
☑ Send test

Preview (B)

Preview as HTML
Preview as Plain Text

Send test email to:
kurund@civicrm.org
✉ Send test

Send test email to group:
☑ Select Group
☑ Send test

CiviMail A / B Testing

A/B Test Results: Monthly newsletter

This report displays the current results for your A/B test. You can return to this page to view the latest statistics by navigating to "Manage A/B Tests" and clicking "Results".

	✉ Select as Final	✉ Select as Final	
Delivery	**Mailing A**	**Mailing B**	**Final**
Status	Scheduled		Not selected
Scheduled	2015-04-21 11:18:35		
Started at	Not started		
Completed at	Not completed		

Performance	**Mailing A**	**Mailing B**	**Final**
Successful Deliveries	🔍 0	🔍 0	
Tracked Opens	🔍 n/a	🔍 n/a	
Click-throughs	🔍 0	🔍 0	
Bounces	🔍 0	🔍 0	
Unsubscribes	🔍 n/a	🔍 n/a	

Details	**Mailing A**	**Mailing B**	**Final**
Mailing Name	Test A (Monthly newsletter)	Test B (Monthly newsletter)	
From	"CiviCRM Team" <info@civicrm.org>	"CiviCRM Team" <info@civicrm.org>	
Subject	Sample CiviMail Newsletter A	Sample CiviMail Newsletter B	
Recipients	**Include:** Newsletter Subscribers, Summer Program Volunteers		
Content	🗗 HTML	🗗 HTML	
Attachments			
Tracking	✔ Click Throughs ✔ Opens	✔ Click Throughs ✔ Opens	
Responding	✘ ~~Track Replies~~ ✘ ~~Forward Replies~~ 🗗 Opt-out	✘ ~~Track Replies~~ ✘ ~~Forward Replies~~ 🗗 Opt-out	

Pledge Payment - Batch Entry

New Data Entry Batch

✓ Save   ✗ Cancel

Batch Name * `Batch 1: 2015-04-21`

Type
- ✓ Contribution
- Membership
- Pledge Payment

Description

Number of Items *

Total Amount *

✓ Save   ✗ Cancel

Pledge Payment - Batch Entry

Batch Data Entry for Pledge Payments

Click Validate & Process below when you've entered all items for the batch. You can also Save & Continue Later at any time. Go to Administer > Customize Data and Screens > Profiles > Reserved Profiles > to add, remove or change the order of columns.

Total amount expected	$ 500.00	
Total amount entered	$ 450.00	

	Contact	Open Pledges (Due Date - Amount)	Type	Amount	Status	Received	Source
✓	Doe, Jane ✗ 🔍	01/01/2009, 200.00 USD	Donation	200.00 adjust payment amount	Completed	04/21/2015 📅 Time 12:03PM ✗	
		-select- 01/01/2009, 200.00 USD 12/01/2009, 200.00 USD					
✓	Blackwell, Josefa ✗ 🔍	✓ 04/21/2015, 250.00 USD	Donation	250.00 adjust payment amount	Completed	04/21/2015 📅 Time 12:03PM ✗	

Validate & Process the Batch   **Save & Continue Later**

PCP Notifications

Peer-to-peer fundraisers donation notifications

PCP Notifications

You have received a donation at your personal page: [My Personal Civi Fundraiser](#)

Your fundraising total has been updated.
The donor's information is listed below. You can choose to contact them and convey your thanks if you wish.
The donor's name has been added to your honor roll unless they asked not to be included.

Receive Date:	April 21st, 2015 2:42 PM
Amount:	$ 10.00
Name:	Dave Green
Email:	daveone@foo.org

Report Layout - Before

Event Participants List

▸ Report Criteria

▸ Report Settings

[Print Report]   [PDF]   [Export to CSV]   ⊕ Add Contacts to Group ▾

Participant Name		Event	Status	Role
allanjameson@notmail.co.nz	View	Rain-forest Cup Youth Soccer Tournament	Registered	Attendee
Bachman, Justina	View	Rain-forest Cup Youth Soccer Tournament	No-show	Host

Report Layout - Now

Report Layout - Now

Demo

New Scheduled Reminders

- Membership renewals

- Birthdays and Anniversaries

- Contact created or updated

Happy Birthday!

Make things easier ...

- Autocomplete search filters

- More in place editing

- Advanced search layout

… and clearer

Describe permissions

Show processor

… and clearer

Decimal amounts (yay)

Membership Signup

Membership Options   General - 2 Years - $ 17... ▼
    *

Additional Contribution   `11.50`

Total Fee(s) $ 186.50

Show deceased

👤 Justina Ivanov (deceased)

[Actions ˅]   [✎ Edit]   [🗑 Delete Contact]

Summary | Contributions 0 | Pledges 0 | Memberships 0

THE POWER OF COMMUNITY

ALL THIS COOL STUFF WAS MADE POSSIBLE BY OUR GENEROUS SPONSORS AND CONTRIBUTORS …

AGH STRATEGIES
CENTER FOR CONSTITUTIONAL RIGHTS
CHRISTIAN WACH
COMPUCORP
FUZION
GOOGLE (GSOC)
GREENLEAF ADVANCEMENT
JMA CONSULTING
PALANTE TECHNOLOGY COOPERATIVE
PROGRESSIVE TECHNOLOGY PROJECT
NEW YORK STATE SENATE
SYMBIOTIC COOP
VEDA CONSULTING
VESTIBULAR DISORDERS ASSOC
WEB ACCESS
ZING