

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

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.

Repeat Event

✓ Save ✕ Cancel

Repetition Start Date  Time ✕

Repeats every * 

Repeats by  day of the month

 day of the week

Ends *  After occurrences

 On  ✕

Exclude Dates 

✓ Save ✕ Cancel

Sales Tax / VAT / Invoicing

CiviContribute Component Settings

Save Cancel

Enable Tax and Invoicing

Invoice Prefix
Enter prefix to be display on PDF for invoice

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

Due Date

For transmission
Select the interval for due date.

Notes or Standard
Terms

Rich text editor toolbar with icons for undo, redo, bold, italic, strikethrough, bulleted list, numbered list, link, unlink, source, and other formatting options.

Buttons: **B** *I* ~~S~~ ~~I~~_x [List Icons] [Link Icon] [Unlink Icon] [Source Icon] | Styles - | Format - | Font - | Size - | A - | A - | ?

body

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

Automatically email invoice when user purchases online

Tax Term

Tax Display Settings

Save Cancel

Sales Tax / VAT

NAME							LED?
Accounts Receivable	A						Edit Disable Delete
Deposit Bank Account	A						Edit Disable Delete
Payment Processor Account	A						Edit Disable Delete
Premiums inventory	A						Edit Disable Delete
Premiums	A						Edit Disable Delete
Banking Fees	P						Edit Disable Delete
Accounts Payable	A						Edit Disable Delete
No VAT Rate Account	N						Edit Disable Delete
VAT 0 Rate Account	V						Edit Disable Delete
VAT Full Rate Account	F						Edit Disable Delete
VAT Half Rate Account	H						Edit Disable Delete
Campaign Contribution	S						Edit Disable Delete
Discounts	C						Edit Disable Delete
Donation	D						Edit Disable Delete
Event Fee	D						Edit Disable Delete
Member Dues	D						Edit Disable Delete
No VAT Rate FinancialType	N						Edit Disable Delete
VAT 0 Rate FinancialType	V						Edit Disable Delete
VAT Full Rate FinancialType	F						Edit Disable Delete

Financial Accounts

Name *

Description

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

Financial Account Type *

Accounting Code 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 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 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?

Sales Tax / VAT

Home » CiviCRM » Administer CiviCRM

Financial Types

Financial types are used to categorize 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

Finar

 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 for installments.

Sales Tax / VAT

View Contribution from Hello Hi ✕

From	Hello Hi
Financial Type	VAT Full Rate FT
Total Amount	\$ 12.00
Total Tax Amount	\$ 2.00
Non-deductible Amount	\$ 12.00
Fee Amount	\$ 1.50
Net Amount	\$ 10.50
Received	April 21st, 2015 9:06 PM
Received Into	Payment Processor Account
Contribution Status	Completed
Paid By	Credit Card (Test Processor)
Source	Online Contribution: Help Support CivCRM!
Online Contribution Page	Help Support CivCRM!
Receipt Sent	April 21st, 2015 9:06 PM
Transaction ID	live_00000002
Invoice ID	1c7ab780a1369bf712987e6d0ede666a

▼ Donor Information

How long have you been a donor?

Known areas of interest

Edit Delete ✕ Done Print Invoice Email Invoice

Invoicing



INVOICE

Jane Doe
1234 Lebon Drive
CA
San Diego 92156

Invoice Date:
April 21, 2015
Invoice Number:
INV_95
Reference:
Online Contribution: Help Support CiviCRM!

CiviCRM
330 Upper Terrace
CA
San Francisco 94117
United States
info@civicrm.org

Description	Quantity	Unit Price	Sales Tax	Amount USD
Contribution Amount - Booster	1	\$ 10.00	20%	\$ 10.00
Sub Total				\$ 10.00
TOTAL Sales Tax 20%				\$ 2.00
TOTAL USD				\$ 12.00
LESS Amount Paid				\$ 12.00
AMOUNT DUE:				\$ 0.00

DUE DATE: May 1 ,2015

-><-

PAYMENT ADVICE

To:
CiviCRM
330 Upper Terrace
CA
San Francisco 94117
United States

info@civicrm.org

Customer: Jane Doe
Invoice Number: INV_95

Amount Due: \$ 0.00
Due Date: May 1 ,2015

Civimail Streamlining

» 1. Define Mailing 2. Review and Schedule

Mailing Attachments Header and Footer Publication Responses Tracking

Mailing Name*

Template

From*

Recipients* ~18 recipients

Subject* Tokens

HTML



 Your Newsletter Title

body

Plain Text

Preview

Preview as HTML
 Preview as Plain Text

Send test email to: Send test

Send test email to group: Send test

Next Delete Draft Save Draft

Civimail Streamlining

✓ 1. Define Mailing

» 2. Review and Schedule

Review

Mailing Name	CiviCRM Monthly newsletter
Recipients	~18 recipients (Include: Newsletter Subscribers, Advisory Board)
Content	HTML Plain Text
Tracking	<input checked="" type="checkbox"/> Click Throughs <input checked="" type="checkbox"/> Opens
Responding	<input checked="" type="checkbox"/> Track Replies <input checked="" type="checkbox"/> Forward Replies Opt-out Resubscribe Unsubscribe
Publication	Public Pages

Schedule

Send immediately

Send at: 

✓ Submit Mailing

◀ Previous

🗑 Delete Draft

💾 Save Draft

Civimail Streamlining

» 1. Content 2. Options 3. Review

Mailing Name*

Template

From*

Recipients* ~18 recipients

Subject* <> Tokens

HTML



  Your Newsletter Title

body

Plain Text

Header and Footer

Attachments

Preview

Preview as HTML
 Preview as Plain Text

Send test email to: Send test

Send test email to group: Send test

Next Delete Draft Save Draft

Civimail Streamlining

✓ 1. Content » 2. Options 3. Review

▼ Schedule

Send immediately

Send at: 

▼ Responses

Track Replies ?

Opt-out Message*

Opt-out Message

Resubscribe Message*

Resubscribe Message

Unsubscribe Message*

Unsubscribe Message

▼ Tracking

Track Click Throughs ?

Track Opens ?

▼ Publication

Mailing Visibility* ?

Public Pages

◀ Previous

▶ Next

🗑 Delete Draft

💾 Save Draft

Civimail Streamlining

✓ 1. Content

✓ 2. Options

» 3. Review

Review

Mailing Name	CiviMail May newsletter
Recipients	<input type="checkbox"/> ~18 recipients (Include: Newsletter Subscribers)
Content	<input type="checkbox"/> HTML <input type="checkbox"/> Plain Text
Tracking	<input checked="" type="checkbox"/> Click Throughs <input checked="" type="checkbox"/> Opens
Responding	<input checked="" type="checkbox"/> Track Replies <input checked="" type="checkbox"/> Forward Replies <input type="checkbox"/> Opt-out <input type="checkbox"/> Resubscribe <input type="checkbox"/> Unsubscribe
Publication	Public Pages

✓ Submit Mailing

← Previous

Delete Draft

Save Draft

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

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

Recipients x Newsletter Subscribers x Summer Program Volunteers ~24 recipients

Distribution

Test Mailing A	<input type="range" value="20"/>	(20%)
Test Mailing B	<input type="range" value="20"/>	(20%)
Final Mailing	<input type="range" value="60"/>	(60%)

◀ Previous ▶ Next Delete Draft Save Draft

Mailing

Header and Footer

Publication

Responses

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



✓ 1. Setup

✓ 2. Target

✓ 3. Compose

» 4. Schedule

Send

Send A/B test immediately

Send A/B test at: 

Assess

Assess A/B results on an on-going basis

Assess A/B test at: 

✓ Submit Mailing

◀ Previous

🗑 Delete Draft

💾 Save Draft

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	<input checked="" type="checkbox"/> Click Throughs <input checked="" type="checkbox"/> Opens	<input checked="" type="checkbox"/> Click Throughs <input checked="" type="checkbox"/> Opens	
Responding	<input checked="" type="checkbox"/> Track Replies <input checked="" type="checkbox"/> Forward Replies <input checked="" type="checkbox"/> Opt-out	<input checked="" type="checkbox"/> Track Replies <input checked="" type="checkbox"/> Forward Replies <input checked="" type="checkbox"/> Opt-out	

Pledge Payment - Batch Entry

New Data Entry Batch

✓ Save × Cancel

Batch Name *

Type ✓ Contribution

Membership

Description

Pledge Payment

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 \$ 500.00
expected

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	Completed	04/21/2015 Time 12:03PM	
	-select- 01/01/2009, 200.00 USD 12/01/2009, 200.00 USD		adjust payment amount		*	
✓ Blackwell, Josefa	04/21/2015, 250.00 USD	Donation	250.00	Completed	04/21/2015 Time 12:03PM	
			adjust payment amount		*	

Validate & Process the Batch

Save & Continue Later

PCP Notifications

Peer-to-peer fundraisers donation notifications

[Title](#) [Amounts](#) [Memberships](#) [Receipt](#) [Tell a Friend](#) [Profiles](#) [Premiums](#) [Widgets](#) [Personal Campaigns](#)

Allow constituents to create their own personal fundraising pages linked to this contribution page. ?

Enable Personal Campaign Pages? (for this contribution page)

Approval required ?

Notify Email ?

Supporter Profile * ?

Owner Email Notification * Owner chooses whether to receive notifications
 Notifications are sent to ALL owners
 Notifications are NOT available



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

Event Participants List

[Columns](#)[Sorting](#)[Display Options](#)[Filters](#)[Title and Format](#)[Email Delivery](#)[Access](#)[Preview Report](#)[Update Report](#)[Save a Copy...](#)[Print Report](#)[PDF](#)[Export to CSV](#)[+ Add Contacts to Group](#)

Event Is one of Rain-forest Cup Youth Soccer Tournament, Fall Fundraiser Dinner

Participant Name		Event	Status	Role
alice@foo.org	View	Rain-forest Cup Youth Soccer Tournament	Registered	Attendee
allenr24@notmail.biz	View	Fall Fundraiser Dinner	Cancelled	Speaker

Report Layout - Now

Demo

New Scheduled Reminders

- Membership renewals
- Birthdays and Anniversaries
- Contact created or updated

Happy Birthday!

▶ New Scheduled Reminder

Title *

Entity

Birth Date
Created Date
Modified Date
Marriage Date

Actual date only
Each anniversary

When 

OR

Make things easier ...

- Autocomplete search filters
- More in place editing
- Advanced search layout

... and clearer

Describe permissions

Permission	anonymous user
CiviCRM	
CiviCRM: add contacts Create a new contact record in CiviCRM	<input type="checkbox"/>
CiviCRM: view all contacts View ANY CONTACT in the CiviCRM database, export contact info and perform activities such as Send Email, Phone Call, etc.	<input type="checkbox"/>

Show processor

Contribution Status	Completed
Paid By	Credit Card (PayPal)

... and clearer

Decimal amounts (yay)

Membership Signup

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

Additional Contribution

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