Extending Donor Management Capabilities in CiviCRM

July 1, 2025

Today's Plan

- Donor Management Overview
- Summary Fields & *More* Summary Fields
- Relationship Types & Relationship Block Extension
- Leveraging Activity Types
- DonorSearch Integration
- Grant Management Basics
- Email-to-Activity Functionality
- Questions

About Me

Hi. I'm Gena Dellett.

gena@skvare.com
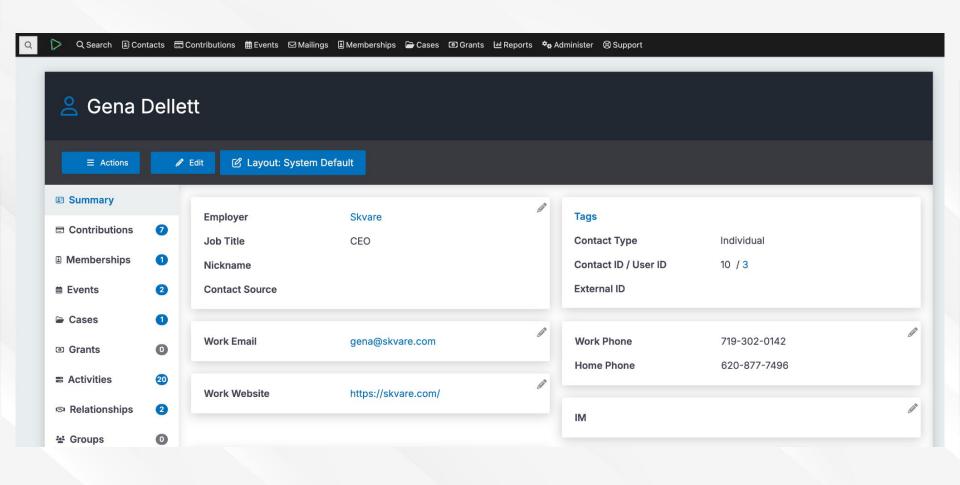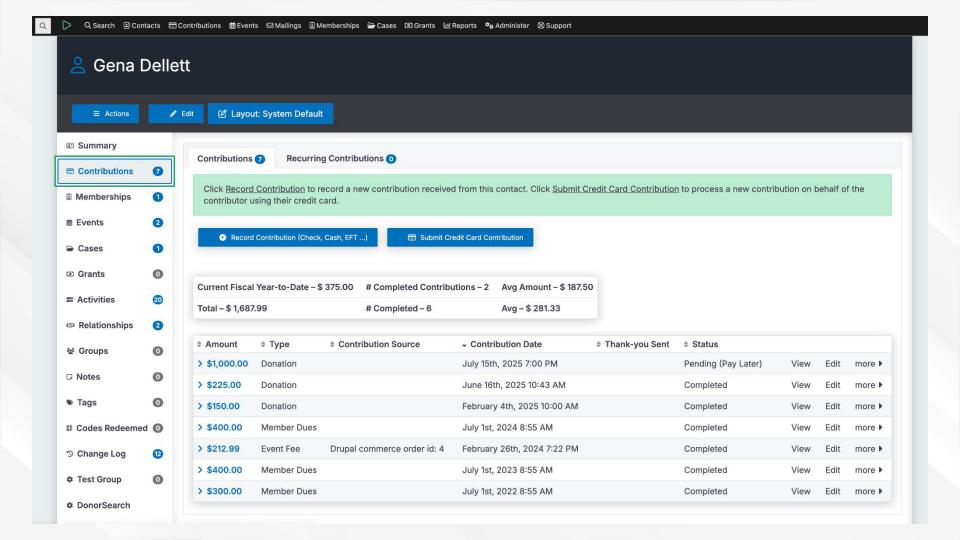
Meet Skvare

- Founded in 2008

- Team of 14 - *75 collective "Skvare-years" of experience*

- Focused on supporting nonprofits with their technology needs

- We're constructively opinionated

- We're values-driven

Donor Management Overview

Gena Dellett

Actions   **Edit**   **Layout: System Default**

- **Summary**
- **Contributions** 7
- **Memberships** 1
- **Events** 2
- **Cases** 1
- **Grants** 0
- **Activities** 20
- **Relationships** 2
- **Groups** 0

Employer	Skvare
Job Title	CEO
Nickname	
Contact Source	

Tags	
Contact Type	Individual
Contact ID / User ID	10 / 3
External ID	

Work Email	gena@skvare.com

Work Website	https://skvare.com/

Work Phone	719-302-0142
Home Phone	620-877-7496

IM

👤 **Gena Dellett**

☰ Actions | ✏ Edit | 📝 Layout: System Default

🖻 Summary

🖃 Contributions 7

🖩 Memberships 1

🎫 Events 2

💼 Cases 1

📷 Grants 0

≡ Activities 20

👁 Relationships 2

👥 Groups 0

🗋 Notes 0

🏷 Tags 0

🔢 Codes Redeemed 0

🕘 Change Log 12

⚙ Test Group 0

📍 DonorSearch

Contributions 7 | Recurring Contributions 0

Click Record Contribution to record a new contribution received from this contact. Click Submit Credit Card Contribution to process a new contribution on behalf of the contributor using their credit card.

⊕ Record Contribution (Check, Cash, EFT ...) | 🖃 Submit Credit Card Contribution

| Current Fiscal Year-to-Date – $ 375.00 | # Completed Contributions – 2 | Avg Amount – $ 187.50 |
| Total – $ 1,687.99 | # Completed – 6 | Avg – $ 281.33 |

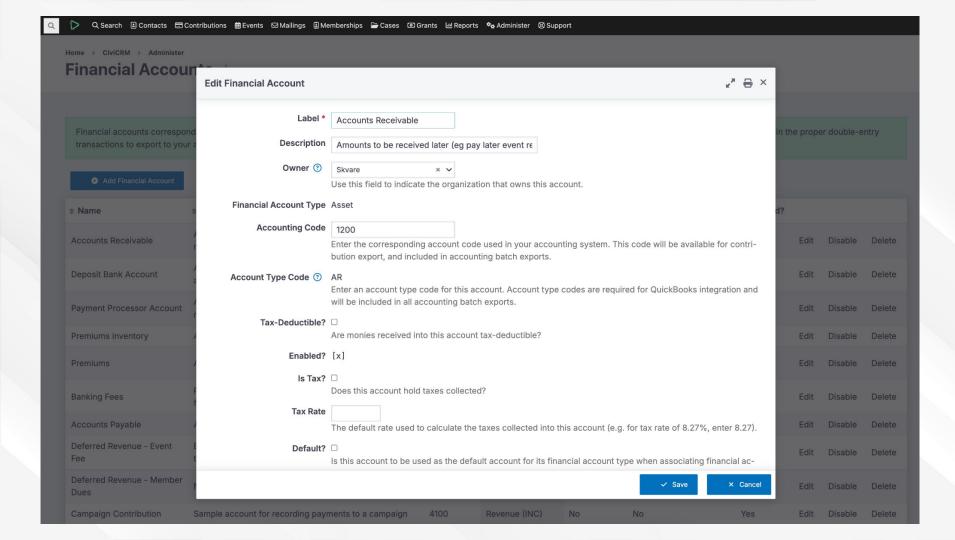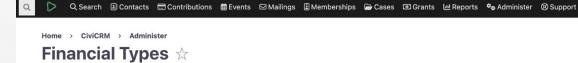| ⇕ Amount	⇕ Type	⇕ Contribution Source	▾ Contribution Date	⇕ Thank-you Sent	⇕ Status			
❯ $1,000.00	Donation		July 15th, 2025 7:00 PM		Pending (Pay Later)	View	Edit	more ▸
❯ $225.00	Donation		June 16th, 2025 10:43 AM		Completed	View	Edit	more ▸
❯ $150.00	Donation		February 4th, 2025 10:00 AM		Completed	View	Edit	more ▸
❯ $400.00	Member Dues		July 1st, 2024 8:55 AM		Completed	View	Edit	more ▸
❯ $212.99	Event Fee	Drupal commerce order id: 4	February 26th, 2024 7:22 PM		Completed	View	Edit	more ▸
❯ $400.00	Member Dues		July 1st, 2023 8:55 AM		Completed	View	Edit	more ▸
❯ $300.00	Member Dues		July 1st, 2022 8:55 AM		Completed	View	Edit	more ▸

Financial Accounts ☆

Financial accounts correspond to those in your accounting system. Financial types, payment methods, and premiums are associated with financial accounts so that they can result in the proper double-entry transactions to export to your accounting system.

⊕ Add Financial Account

⬍ Name	⬍ Description	⬍ Acctg Code	▲ Account Type	⬍ Deductible?	⬍ Reserved?	⬍ Default?	⬍ Enabled?			
Accounts Receivable	Amounts to be received later (eg pay later event revenues)	1200	Asset (AR)	No	No		Yes	Edit	Disable	Delete
Deposit Bank Account	All manually recorded cash and cheques go to this account	1100	Asset (BANK)	No	No	✓	Yes	Edit	Disable	Delete
Payment Processor Account	Account to record payments into a payment processor merchant account	1150	Asset (BANK)	No	No		Yes	Edit	Disable	Delete
Premiums inventory	Account representing value of premiums inventory	1375	Asset (OCASSET)	No	No		Yes	Edit	Disable	Delete
Premiums	Account to record cost of premiums provided to payors	5100	Cost of Sales (COGS)	No	No	✓	Yes	Edit	Disable	Delete
Banking Fees	Payment processor fees and manually recorded banking fees	5200	Expenses (EXP)	No	No	✓	Yes	Edit	Disable	Delete
Accounts Payable	Amounts to be paid out such as grants and refunds	2200	Liability (AP)	No	No	✓	Yes	Edit	Disable	Delete
Deferred Revenue - Event Fee	Event revenue to be recognized in future months when the events occur	2730	Liability (OCLIAB)	No	No		Yes	Edit	Disable	Delete
Deferred Revenue - Member Dues	Membership revenue to be recognized in future months	2740	Liability (OCLIAB)	No	No		Yes	Edit	Disable	Delete
Campaign Contribution	Sample account for recording payments to a campaign	4100	Revenue (INC)	No	No		Yes	Edit	Disable	Delete

Home › CiviCRM › Administer

Financial Accounts

Financial accounts correspond
transitions to export to your a

in the proper double-entry

Add Financial Account

Name						

Edit Financial Account

Label * `Accounts Receivable`

Description `Amounts to be received later (eg pay later event re`

Owner ? `Skvare` × ▾

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

Financial Account Type Asset

Accounting Code `1200`

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 ? AR

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? [x]

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 ac-

Save   Cancel

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	F			Edit	Disable	Delete
Accounts Payable	A			Edit	Disable	Delete
Deferred Revenue - Event Fee	E			Edit	Disable	Delete
Deferred Revenue - Member Dues	M			Edit	Disable	Delete
Campaign Contribution	Sample account for recording payments to a campaign	4100	Revenue (INC)	No	No	Yes	Edit	Disable	Delete

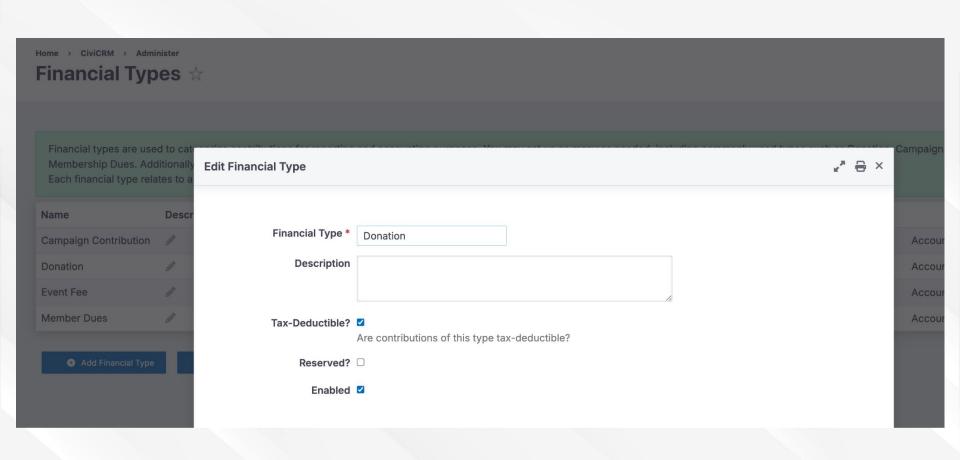Home › CiviCRM › Administer

Financial Types ☆

Financial types are used to categorize contributions for reporting and accounting purposes. You may set up as many as needed, including commonly used types such as Donation, Campaign Contribution or Membership Dues. Additionally, financial types can account for the inventory and expense of premiums.
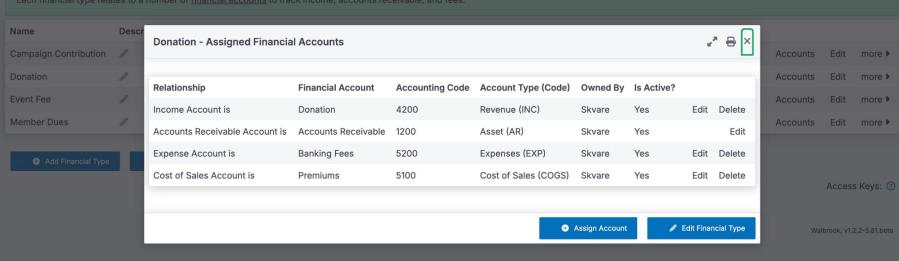Each financial type relates to a number of financial accounts to track income, accounts receivable, and fees.

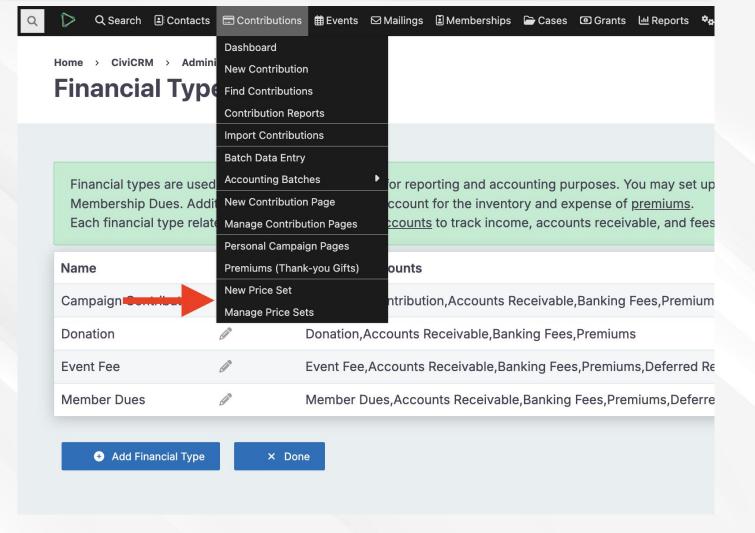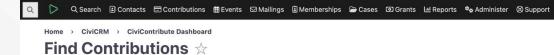| Name	Description	Financial Accounts	Deductible?	Reserved?	Enabled?			
Campaign Contribution	✏	Campaign Contribution,Accounts Receivable,Banking Fees,Premiums	No	No	Yes	Accounts	Edit	more ▶
Donation	✏	Donation,Accounts Receivable,Banking Fees,Premiums	Yes	No	Yes	Accounts	Edit	more ▶
Event Fee	✏	Event Fee,Accounts Receivable,Banking Fees,Premiums,Deferred Revenue - Event Fee	No	No	Yes	Accounts	Edit	more ▶
Member Dues	✏	Member Dues,Accounts Receivable,Banking Fees,Premiums,Deferred Revenue - Member Dues	Yes	No	Yes	Accounts	Edit	more ▶

⊕ Add Financial Type   ✕ Done

Financial Types ☆

Financial types are used to cat~~egorize contributions for reporting and accounting purposes. You may set up as many as needed, including commonly used types such as Donation, Campaign~~
Membership Dues. Additionally~~
Each financial type relates to a~~

Name	Descr
Campaign Contribution ✏	
Donation ✏	
Event Fee ✏	
Member Dues ✏	

⊕ Add Financial Type

Edit Financial Type

⤢ 🖨 ✕

Financial Type *   Donation

Description

Tax-Deductible? ☑
Are contributions of this type tax-deductible?

Reserved? ☐

Enabled ☑

Accou
Accou
Accou
Accou

Financial Types ☆

Financial types are used to categorize contributions for reporting and accounting purposes. You may set up as many as needed, including commonly used types such as Donation, Campaign Contribution or Membership Dues. Additionally, financial types can account for the inventory and expense of premiums.
Each financial type relates to a number of financial accounts to track income, accounts receivable, and fees.

Name	Descr
Campaign Contribution	
Donation	
Event Fee	
Member Dues	

Add Financial Type

Access Keys: ?

Donation - Assigned Financial Accounts

Relationship	Financial Account	Accounting Code	Account Type (Code)	Owned By	Is Active?		
Income Account is	Donation	4200	Revenue (INC)	Skvare	Yes	Edit	Delete
Accounts Receivable Account is	Accounts Receivable	1200	Asset (AR)	Skvare	Yes		Edit
Expense Account is	Banking Fees	5200	Expenses (EXP)	Skvare	Yes	Edit	Delete
Cost of Sales Account is	Premiums	5100	Cost of Sales (COGS)	Skvare	Yes	Edit	Delete

Assign Account   Edit Financial Type

Accounts Edit more ▸
Accounts Edit more ▸
Accounts Edit more ▸
Accounts Edit more ▸

Walbrook, v1.2.2-5.81.beta

Dashboard

New Contribution

Find Contributions

Contribution Reports

Import Contributions

Batch Data Entry

Accounting Batches ▶

New Contribution Page

Manage Contribution Pages

Personal Campaign Pages

Premiums (Thank-you Gifts)

New Price Set

Manage Price Sets

Home > CiviCRM > Admini...

Financial Type

Financial types are used ~~for reporting and accounting purposes. You may set up
Membership Dues. Addit~~ count for the inventory and expense of premiums.
Each financial type relate~~counts to track income, accounts receivable, and fees

Name		~~ounts~~
Campaign Contribut...		~~ntribution,~~Accounts Receivable,Banking Fees,Premium
Donation	✏	Donation,Accounts Receivable,Banking Fees,Premiums
Event Fee	✏	Event Fee,Accounts Receivable,Banking Fees,Premiums,Deferred R
Member Dues	✏	Member Dues,Accounts Receivable,Banking Fees,Premiums,Deferre

⊕ Add Financial Type   ✕ Done

Find Contributions ☆

⌄ Edit Search Criteria

Contributor Name or Email

[   ]

Contributor Tag(s)

[▾]

Contact Type

[- any Contact Type -   ▾]

Contribution Date

[- any -   ▾]

Contribution Amounts

From [   ] To [   ]

Currency

[- any -   ▾]

Payment Method

[- any -   ▾]

Card Type

[- any Card Type -   ▾]

Card Number

[   ]

Contributions OR Soft Credits?

[Contributions Only   ▾]

Contributor Group(s)

[▾]

☐ Search Deleted Contacts

Contribution Status

[✕ Completed   ▾]

Transaction ID

[   ]

Invoice Number

[   ]

✓ Search

Contribution Reports ☆

⊕ New Contribution Report   **View All Reports**

⌄ Contribution Reports

⟩ Contribution Summary	Groups and totals contributions by criteria including contact, time period, contribution type, contributor location, etc.	View Results · more ▶
⟩ Contribution Details	Lists specific contributions by criteria including contact, time period, contribution type, contributor location, etc. Contribution summary report points to this report for contribution details.	View Results · more ▶
⟩ Repeat Contributions	Given two date ranges, shows contacts who contributed in both the date ranges with the amount contributed in each and the percentage increase / decrease.	View Results · more ▶
⟩ Contributions by Organization	Displays a detailed list of contributions grouped by organization, which includes contributions made by employees for the organisation.	View Results · more ▶
⟩ Contributions by Household	Displays a detailed list of contributions grouped by household which includes contributions made by members of the household.	View Results · more ▶
⟩ Top Donors	Provides a list of the top donors during a time period you define. You can include as many donors as you want (for example, top 100 of your donors).	View Results · more ▶
⟩ SYBUNT (some year but not this year)	Some year(s) but not this year. Provides a list of constituents who donated at some time in the history of your organization but did not donate during the time period you specify.	View Results · more ▶
⟩ LYBUNT (last year but not this year)	Last year but not this year. Provides a list of constituents who donated last year but did not donate during the time period you specify as the current year.	View Results · more ▶
⟩ Soft Credits	Shows contributions made by contacts that have been soft-credited to other contacts.	View Results · more ▶
⟩ Bookkeeping Transactions	Provides transaction details for all contributions and payments, including Transaction #, Invoice ID, Payment Instrument and Check #.	View Results · more ▶
⟩ Personal Campaign Page Summary	Summarizes amount raised and number of contributors for each Personal Campaign Page.	View Results · more ▶
⟩ Contribution Aggregate by Relationship	List contact's donation history, grouped by year, along with contributions attributed to any of the contact's related contacts.	View Results · more ▶
⟩ Recurring Contributions	Provides information about the status of recurring contributions	View Results · more ▶

Top Donors ☆

Columns **Sorting** **Filters** **Title and Format** **Email Delivery** **Access**

Include Report in Navigation Menu?	☑ Link to [Show Criteria ▾] All report instances are automatically included in the Report Listing page. Check this box to also add this report to the navigation menu.
Parent Menu ⓘ	[- select - ▾]
Permission ⓘ	[CiviContribute: access Civi... ▾]
ACL Group/Role	Anonymous user Authenticated user Content editor Administrator [Add >>] [<< Remove]
Add to My Reports? ⓘ	☐ If set to Yes, this report will appear in the My Reports section of the reports listing page and will only be visible by you.
Reserved Report? ⓘ	☐ If reserved, only users with 'administer reserved reports' permission can modify this report instance.
Available for Dashboard? ⓘ	☑ Users with appropriate permissions can add this report to their dashboard.
Limit Dashboard Results ⓘ	[ ] rows
Cache dashlet for ⓘ	[60] minutes

✓ Refresh results

— 5 Available Dashlets | Filter by title...

Drag and drop dashlets onto the left or right columns below to add them to your dashboard. Changes are automatically saved. ⓘ

| Activities | All Cases | Case Dashboard Dashlet | My Cases | Top Donors 🗑 |

CiviCRM Resources

Created by contributors around the world, CiviCRM is, at its heart, built to impact the world. As open source software, CiviCRM is made freely available for use and improvement, serving organizations whose missions collectively impact and improve the world in which we live. Please donate to support the project and see other ways to get involved!

Configure and extend

💡 System Status

≣ Configuration checklist

🧩 Enhance CiviCRM with extensions

📗 Review CiviCRM documentation

Get support

CiviCRM News

| Blog | Make-It-Happen |

> CiviCamp and CiviSprint Europe coming up and open for registration - After the success of the ...

> CiviCRM 6.3 Release - CiviCRM version 6.3.0 is now ready to download. In fact, since we're a bi...

> How to Turn Your Annual Conference Into Year-Round Member Engagement (With Practical Ap...

> SYSTOPIA Extension of the Month #17: CiviProxy - At SYSTOPIA, we've built and maintain a wid...

> PSA: Splitting Off Product Updates from Community News - Consistent with our push over the ...

> Documentation at Montara sprint - During the Point Montara Lighthouse Sprint, Alain Benbassat...

> Save the Date: CiviCRM Scotland Meetup, Thursday 19 June 2025 - This year, CiviCRM turns 2...

> Tips for Maintaining Workflow templates - Since the middle of last year there have been some t...

Summary Fields and *More* Summary Fields

SUMMARY FIELDS

Summary Fields make it easier to search for major donors, recent donors, lapsed donors as well as to show a synopsis of a donor's history. Summary Fields extends your CiviCRM data by creating a tab of fields that total up and summarize donation history.

Once the Extension is installed, visit Administer > Customise > Summary Fields, and select the fields you want displayed. Once you've completed set-up, a new tab will appear alongside other tabs in contact records showing the totals for each individual.

All of the data in the Summary Fields group are calculated from other data entered into your CiviCRM as contributions, membership or event participation. The benefit of making these items available as calculated fields is that they can be searched in Advanced Search and used as a basis for a smart group as well as for tokens in email and print communications. The set of available fields include:

- Total Lifetime Contributions
- Total Contributions this Year
- Total Contributions last Year
- Amount of Last Contribution
- Date of Last Contribution
- Date of First Contribution
- Largest Contribution
- Count of Contributions
- Average Annual (Calendar Year) Contribution
- Date of Last Membership Payment
- Amount of Last Membership Payment
- Name of the last attended event

Reviewed Extension

Development Status
Stable

Active Installs
838

Maintainers
jamie

- View on Github
- Report a bug

Download

Last updated: 2021-05-11

Works with CiviCRM 5.65 or higher.

Home > CiviCRM Extensions

JOINERY'S MORE SUMMARY FIELDS

This extension provides additional fields under the Summary Fields framework:

- CiviContribute: Total Contributions this calendar year (also: renames Summary Fields "Total Contributions this year" to "Total Contributions this fiscal year")
- CiviContribute: Total Contributions last calendar year (also: renames Summary Fields "Total Contributions last year" to "Total Contributions last fiscal year")
- CiviContribute: Total Contributions Calendar Year Before Last (also: renames Summary Fields "Total Contributions Year Before Last" to "Total Contributions Fiscal Year Before Last")
- CiviContribute: Lifetime contributions + soft credits
- CiviContribute: Number of years of contributions
- CiviContribute: Total soft credits this calendar year
- CiviContribute: Total soft credits previous calendar year
- CiviContribute: Total soft credits previous fiscal year
- CiviContribute/Relationship: Related contact contributions this fiscal year
- CiviContribute/Relationship: Related contact contributions this calendar year
- CiviContribute/Relationship: Related contact contributions last fiscal year
- CiviContribute/Relationship: Related contact contributions last calendar year
- CiviContribute/Relationship: Related contact contributions year before last calendar year
- CiviContribute/Relationship: Related contact contributions all time
- CiviContribute/Relationship: Combined contact & related contact contributions this fiscal year
- CiviContribute/Relationship: Combined contact & related contact contributions this calendar year
- CiviContribute/Relationship: Combined contact & related contact contributions last fiscal year
- CiviContribute/Relationship: Combined contact & related contact contributions year before last calendar year

🏆 Reviewed Extension

Development Status
Stable

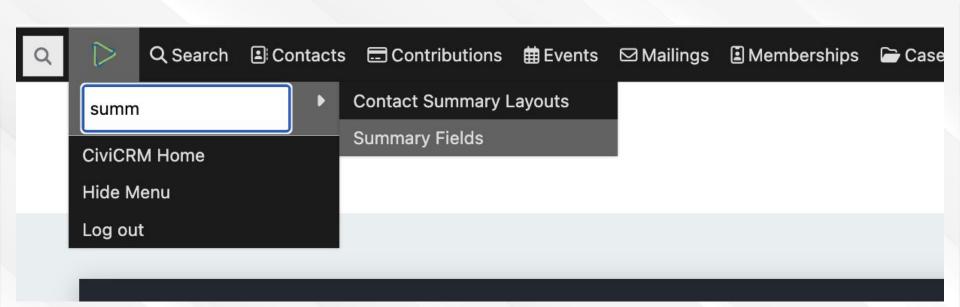**Active Installs**
274

Maintainers
AllenShaw

- View on Github
- Report a bug

Download

Last updated: 2024-12-16
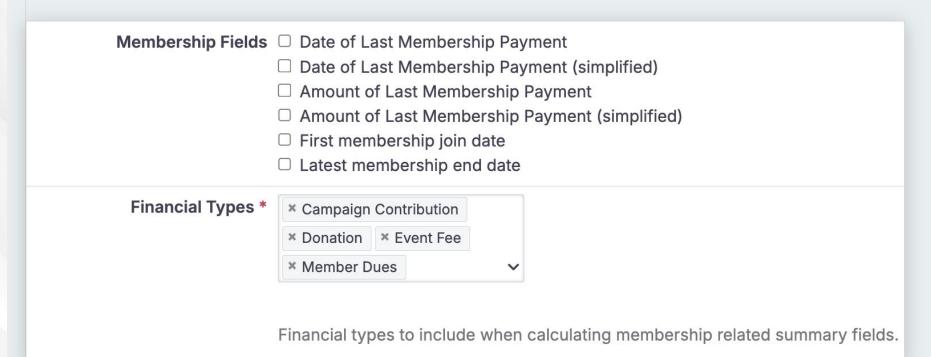
Works with CiviCRM 5.38 or higher.
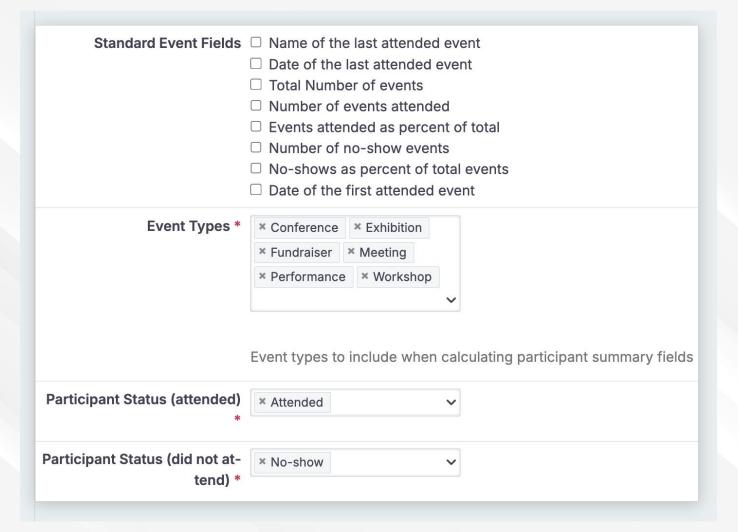
Fundraising

Contribution Fields
- ☐ Total Lifetime Contributions
- ☐ Total Contributions this Fiscal Year
- ☐ Total Contributions in the Last 12 Months
- ☐ Total Deductible Contributions this Fiscal Year
- ☐ Total Contributions last Fiscal Year
- ☐ Total Deductible Contributions last Fiscal Year
- ☐ Total Contributions Fiscal Year Before Last
- ☐ Total Deductible Contributions Fiscal Year Before Last
- ☐ Count of Contributions this Fiscal Year
- ☐ Count of Contributions last Fiscal Year
- ☐ Count of Contributions Fiscal Year Before Last
- ☐ Amount of last contribution
- ☐ Date of Last Contribution
- ☐ Amount of first contribution
- ☐ Date of First Contribution
- ☐ Date of Largest Contribution
- ☐ Largest Contribution
- ☐ Count of Contributions
- ☐ Average Annual (Calendar Year) Contribution
- ☐ Total Contributions this Calendar Year
- ☐ Total Contributions last Calendar Year
- ☐ Total Contributions Calendar Year Before Last
- ☐ Number of Years of Contributions
- ☐ Lifetime contributions + soft credits

Soft Credit Fields
- ☐ Total Lifetime Soft Credits
- ☐ Total Soft Credits this Fiscal Year
- ☐ Total Soft Credits in the Last 12 Months
- ☐ Total Soft Credits this Calendar Year
- ☐ Total Soft Credits last Calendar Year
- ☐ Total Soft Credits last Fiscal Year

Financial Types *

✕ Campaign Contribution
✕ Donation ✕ Event Fee
✕ Member Dues

Financial types to include when calculating contribution related summary fields.

Membership

Membership Fields
- ☐ Date of Last Membership Payment
- ☐ Date of Last Membership Payment (simplified)
- ☐ Amount of Last Membership Payment
- ☐ Amount of Last Membership Payment (simplified)
- ☐ First membership join date
- ☐ Latest membership end date

Financial Types *

✕ Campaign Contribution

✕ Donation   ✕ Event Fee

✕ Member Dues

Financial types to include when calculating membership related summary fields.

Events

Standard Event Fields
- ☐ Name of the last attended event
- ☐ Date of the last attended event
- ☐ Total Number of events
- ☐ Number of events attended
- ☐ Events attended as percent of total
- ☐ Number of no-show events
- ☐ No-shows as percent of total events
- ☐ Date of the first attended event

Event Types *

✕ Conference ✕ Exhibition
✕ Fundraiser ✕ Meeting
✕ Performance ✕ Workshop

Event types to include when calculating participant summary fields

Participant Status (attended) *

✕ Attended

Participant Status (did not attend) *

✕ No-show

CiviMail

CiviMail Fields

☐ Open rate rate all time
☐ Open rate rate last 12 months
☐ Click-through rate all time

Related Contributions

Related Contribution Fields
- ☐ Related contact contributions this fiscal year
- ☐ Related contact contributions this calendar year
- ☐ Related contact contributions last calendar year
- ☐ Related contact contributions year before last calendar year
- ☐ Related contact contributions all time
- ☐ Combined contact & related contact contributions this fiscal year
- ☐ Combined contact & related contact contributions last fiscal year
- ☐ Combined contact & related contact contributions this calendar year
- ☐ Combined contact & related contact contributions last calendar year
- ☐ Combined contact & related contact contributions year before last calendar year
- ☐ Combined contact & related contact contributions all time

Financial Types

[⌄]

Financial types to be used when calculating Related Contribution summary fields.

Relationship Types

[⌄]

Relationship types to be used when calculating Related Contribution summary fields.

Performance Settings

How often should summary data be updated?	⦿ Instantly ○ When ever the cron job is run (increases performance on large installation)
	If 'Instantly' is selected, data will be more accurate but you might face some performance issues on large installations.
	If 'Whenever the cron job is run' is selected, Summary Fields will rely on each CiviCRM Cron job to process all calculations needed for all contacts.
Exclude Summary Fields from logging?	○ Yes ⦿ No
	When advanced logging is turned on, you can exclude Summary Fields from being logged to increase performance and reduce clutter.
When should these changes be applied?	⦿ On the next scheduled job (cron) ○ When I submit this form
	Applying these settings via this form may cause your web server to time out. Applying changes on next scheduled job is recommended.

Relationship Types

Relationship Management

Relationship Type Configuration

Relationship Block Settings

Relationship Block Settings

Display block on contact summary	● Yes ○ No	✕
Exclude expired relationships	○ Yes ● No	✕
Exclude pending relationships	○ Yes ● No	✕

Home › CiviCRM › Administer

Contact Summary Editor ☆

Layouts   [+ Layout]

↓ Layouts on top have highest priority.

Donor Engagement
Show: All contact types
To: All users

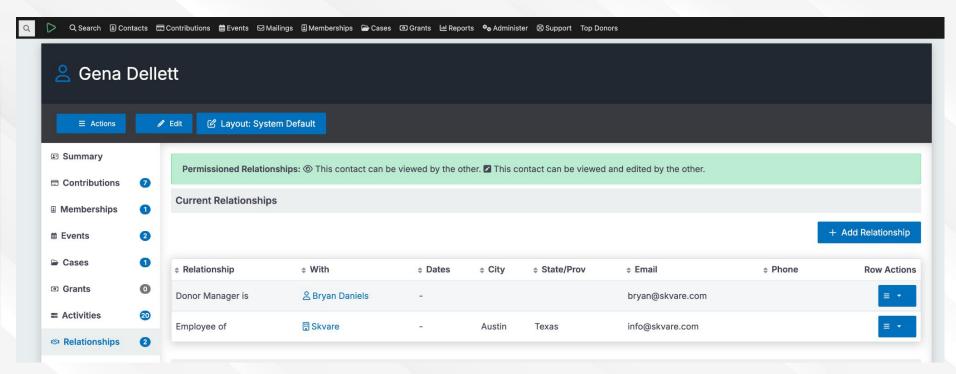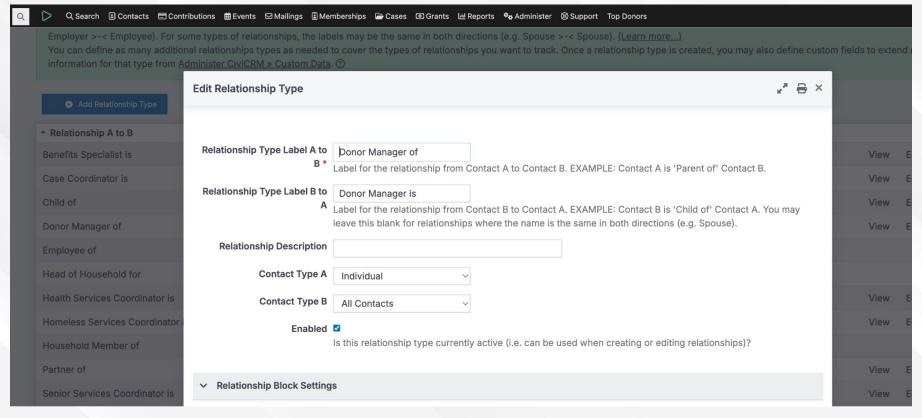### 🔒 System Default
Fallback for all contact types
if no other layout applies for the acting
user

System Default   ✓ All Saved

Customizing the system tabs will affect every layout which uses default tabs.

[👁 Customize Tabs] **System defaults**

[📇 Summary] [🗐 Contributions] [🗐 Memberships] [🎟 Events] [✉ Mailings] [💼 Cases] [💲 Grants] [☰ Activities] [👁 Relationships] [👥 Groups]

[🗋 Notes] [🏷 Tags] [🔢 Codes Assigned] [🔢 Codes Redeemed] [�', Change Log] [🔅 Test Group] [⚙ DonorSearch] [⚙ Summary Fields] [✦ GDPR]

The system default will be shown if no other layout's criteria matches the contact being viewed by the acting user. It displays all blocks enabled on the Contact Edit form; they cannot be rearranged.

🔒 Employer, Nickname, Source
Employer
Job Title
Nickame
Source

🔒 ID, Type, Tags
Tags
Contact Type
Contact ID
External ID

Disabled Blocks
🔒 Open ID   ↺

⊙ Key Relationships   ✏
Relationship 1
Relationship 2
Relationship 3

🔒 Email   ✕
Home Email
Work Email

🔒 Phone   ✕
Home Phone
Work Phone

🔒 Website   ✕
Facebook
Linkedin

🔒 Instant Messenger   ✕
Yahoo
Skype

Relationship Block with Contact Layout Editor

Relationships can be used in groups and reports to segment and take actions on contacts.

Activity Types

Contact Print/Merge Document 22 Export letters and other printable documents Yes Yes Edit

Contact Mass SMS Edit

Contact Reminder S Edit

Contact SMS deliver Edit

Contact Inbound SM Edit

Contact Downloaded Edit

Contact Emailed Inv Edit

Contact Contact Me Edit

Contact Contact Del Edit

Edit Activity Type Option

Label * Donor Management

The option label is displayed to users.

Description Rich Text Editor

Paragraph | B I U S 🔗 A⌄ A⌄ A⌄ A⌄ x₂ ☰⌄ ☰⌄ ☰⌄ ☰⌄

↶ ↷

🖼 🗁 " ▦⌄ ⎯ 🖊⌄ ⟨⟩ Source

Description is included at the top of the activity edit and view pages for this type of activity.

Order * 74

Icon None

Component Contacts AND Cases

Enabled? ☑

Contact Lunch Meet Edit Disable Delete

Contact Donor Mana Edit Disable Delete

CiviEvent Event Regis Edit

CiviEvent Change Reg Edit

CiviContribute Contribution Online or offline contribution. Yes Yes Edit

Save Cancel

Home > CiviCRM > View Contact
☆

Gena Dellett - Donor Management

Added by * [Dellett, Gena ▾]

With Contact [× Daniels, Bryan ▾]

Assigned to ⑦ [× Armstrong, Mark ▾] ⇄

⟿ A copy of this activity will be emailed to each Assignee. ⑦

Subject [Follow up on 2025 Pledge]

Location [   ]

Date * [07/15/2025] [09:47AM]

Duration [   ] minutes

Activity Status * [Scheduled ▾] 🔧

Details Rich Text Editor

[Paragraph ▾] **B** *I* U̲ S̶ 🔗 A ▾ A ▾ A≡ ▾ A↕ ▾ X₂ X² ☰ ☰ ☰ ▾ ⇤ ⇥ I̶

↶ ↷

🖼 🖼 ❝ ☷ ▾ ⯈ 🖊 ▾ </> Source

Gena Dellett

≡ Actions   ✎ Edi...

🗐 Summary

🗂 Contributions 7

🗐 Memberships 1

🗓 Events 2

📁 Cases 1

💳 Grants 0

☰ Activities 19

👁 Relationships 2

👥 Groups 0

Home > CiviCRM > View Contact

☆

Gena Dellett - Donor Management

Repeat Activity

Repeats every * | 1 | | week |

Repeats on ☐ Sun ☐ Mon ☐ Tue ☐ Wed ☐ Thu ☐ Fri ☐ Sat

Start Date | | |

Ends * ○ After | 2 | occurrences

○ On

| |

Exclude Dates | |

Schedule Follow-up

Schedule Follow-up Activity | - select activity - | on

| |

Subject | |

Assigned to | - select Contact - |

✓ Save   ✕ Cancel

Gena Dellett

Actions   Edit

📇 Summary

💲 Contributions 7

🎫 Memberships 1

📅 Events 2

💼 Cases 1

📖 Grants 0

≡ Activities 19

👁 Relationships 2

👥 Groups 0

📝 Notes 0

🏷 Tags 0

⊞ Codes Redeemed 0

🕘 Change Log 12

⚙ Test Group 0

⚙ DonorSearch

Custom Fields for Donor Engagement Tracking

Q Search 🗂 Contacts 🗂 Contributions 🗓 Events ✉ Mailings 🗓 Memberships 📁 Cases ⦿ Grants 📊 Reports ⚙ Administer ⊗ Support Top Donors

Home › **CiviCRM** › **Administer** › **Custom Data**

New Custom Field Group ☆

Use Custom Field Sets to add logically related fields for a specific type of CiviCRM record (e.g. contact records, contribution records, etc.). ⦿

Set Name * ⦿	Donor Management
Used For * ⦿	☰ Activities ⌄ ✕ Donor Management | ⌄
Order * ⦿	20
⦿	☐ Collapse this set on initial display
⦿	☑ Collapse this set in Advanced Search
	☑ Is this Custom Data Set active?
⦿	☑ Is this Custom Data Set public?

Activities as Criteria in Advanced Search

> **Summary Fields**

∨ **Activities**

○ With   ○ Assigned to   ○ Added by

Activity Type

| ✕ Donor Management | ∨ |

Has a Followup Activity?
○ Yes   ○ No

Is a Followup Activity?
○ Yes   ○ No

Activity Date

| - any - | ∨ |

Activities as Criteria in Reports

Activity Details ☆

Columns	Sorting	**Filters**	Developer	Title and Format	Email Delivery	Access

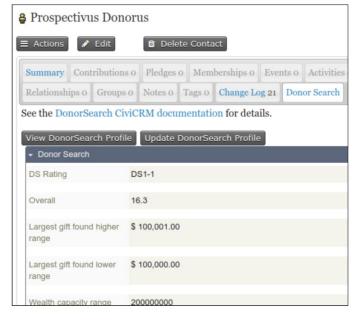| Source Name	Contains	
Assignee Name	**Contains**	**Mark Armstrong**
Target Name	Contains	
Limit To Current User	Is equal to	No
Activity Date	This calendar month ✕	
Activity Subject	Contains	
Activity Type	**Is one of**	**✕ Donor Management**
Activity Status	Is one of	- select -
Location	Contains	
Activity Details	Contains	
Activity Priority	Is one of	- select -
Include Case Activities	Is equal to	No

DonorSearch Integration with CiviCRM

- Shout out and thanks to Greenleaf Advancement and Joinery for developing & maintaining the extension
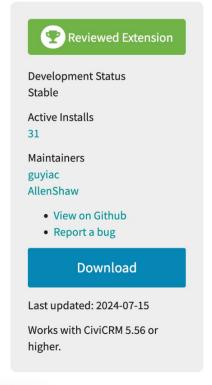- https://github.com/greenleafadvancement/com.greenleafadvancement.donorsearch

Home > CiviCRM Extensions

DONORSEARCH INTEGRATION

Prospect research is essential for identifying high-impact donors within an organization's current donor pool and in the larger community. Donor Search provides these insights for your fundraisers and development teams to learn more about your donors' personal backgrounds, giving histories, wealth indicators, and philanthropic motivations, to help you evaluate any prospect's capacity (ability to give) and affinity (warmth) toward your organization and its goals.

Use this extension to perform wealth lookups on your CiviCRM contacts using the DonorSearch prospect research service. Sites using this extension will receive two free lookups per month. Learn

Reviewed Extension

Development Status
Stable

Active Installs
31

Maintainers
guyiac
AllenShaw

- View on Github
- Report a bug

Download

Last updated: 2024-07-15

Works with CiviCRM 5.56 or higher.

Smarter Fundraising Starts Here: Cut Costs, Save Time, Raise More.

From $20K first gifts to $10M campaigns, DonorSearch powers results that speak for themselves.

REQUEST A DEMO

DONORSEARCH
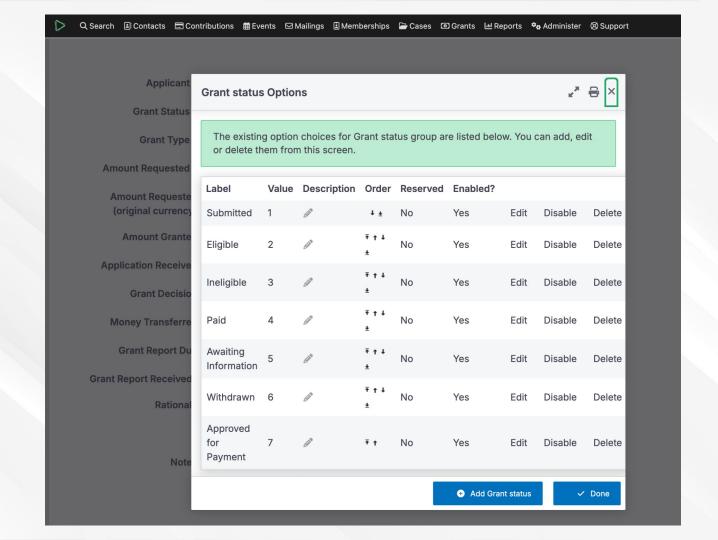
Client Success Story

CLIENTS. REAL IMPACT. ...ARCH SUCCESS STORIES.

"We just raised $10 million... and before that, we had only... $89,000."
-Charles LaFond, Island Senior Resources

Shriners Children's

"we were able to raise double what we did the first year we had it"
-Colin Hosten, Shriners Children's Portland

REEL WORKS

"we were able to identify some prospective board members, and we're confident that they will join our board of directors in the next year."
-Christiannida Correa, Reel Works

CLICK HERE   TO HEAR MORE STORIES!

RECOGNIZED FOR:

AICPA SOC
aicpa.org/soc4so
SOC for Service Organizations
AICPA SOC 2 TYPE II

BEST SOFTWARE
2025
Top 50
NON-PROFIT PRODUCTS

SUMMER 2025
Best Est. ROI

SUMMER 2025
High Performer
SMALL BUSINESS

Ev20 Innovative
Enterprise Viewpoint Top 20 AI Solution Provider 2022

DonorSearch

DS Rating			
Overall From		To	
Largest gift found higher range From		To	
Largest gift found lower range From		To	
Wealth capacity range			
Profile			
Submit time	- any -		
Real estate estimate From		To	
Real estate count From		To	
Total of likely matches From		To	
Count of likely matches From		To	
Foundation board			
Grant seeking board			
Political total From		To	
Business revenues From		To	

SEC stock value From		To	
SEC stock or insider			
IRS 990PF			
Political count From		To	
Real estate trust			
Business affiliation			
FAA Pilot license			
Airplane Owner			
Boat			
RFM (Recency, Frequency, Money)			
Assessed			
Major Gift Likelihood			
Annual Fund Likelihood			
PGID (Planned Giving Identification)			

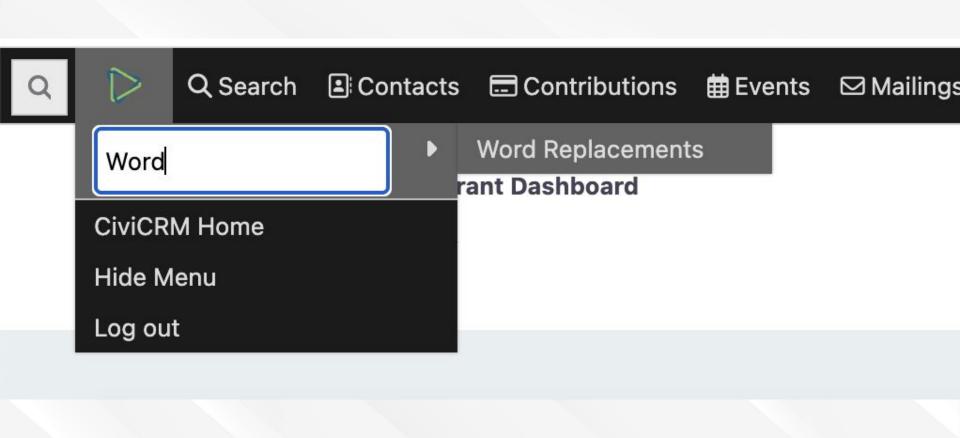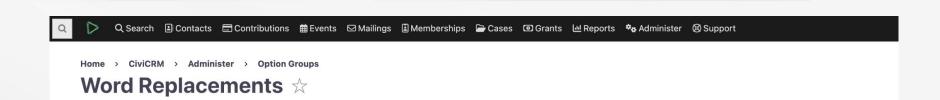# Grant Management

CiviGrant Components

Applicant *   - select Contact -

Grant Status *   - select status -

Grant Type *   - select type -

Amount Requested *

Amount Requested (original currency)

Amount Granted

Application Received

Grant Decision

Money Transferred

Grant Report Due

Grant Report Received?

Rationale

Notes

Applicant

Grant Status

Grant Type

Amount Requested

Amount Requested
(original currency)

Amount Granted

Application Receive

Grant Decisio

Money Transferre

Grant Report Du

Grant Report Received

Rational

Note

Grant status Options

The existing option choices for Grant status group are listed below. You can add, edit or delete them from this screen.

Label	Value	Description	Order	Reserved	Enabled?			
Submitted	1	✏	↓ ↧	No	Yes	Edit	Disable	Delete
Eligible	2	✏	⤒ ↑ ↓ ↓	No	Yes	Edit	Disable	Delete
Ineligible	3	✏	⤒ ↑ ↓ ↓	No	Yes	Edit	Disable	Delete
Paid	4	✏	⤒ ↑ ↓ ↓	No	Yes	Edit	Disable	Delete
Awaiting Information	5	✏	⤒ ↑ ↓ ↓	No	Yes	Edit	Disable	Delete
Withdrawn	6	✏	⤒ ↑ ↓ ↓	No	Yes	Edit	Disable	Delete
Approved for Payment	7	✏	⤒ ↑	No	Yes	Edit	Disable	Delete

⊕ Add Grant status   ✓ Done

Applicant * - select Contact -

Grant Status * - select status -

Grant Type *

Amount Requested

Amount Requested
(original currency)

Amount Granted

Application Received

Grant Decision

Money Transferred

Grant Report Due

Grant Report Received

Rational

Grant Type Options

The existing option choices for Grant Type group are listed below. You can add, edit or delete them from this screen.

Label	Value	Description	Order	Reserved	Enabled?			
Emergency	1	✏️	↓ ⬇	No	Yes	Edit	Disable	Delete
Family Support	2	✏️	⬆ ↑ ↓ ⬇	No	Yes	Edit	Disable	Delete
General Protection	3	✏️	⬆ ↑ ↓ ⬇	No	Yes	Edit	Disable	Delete
Impunity	4	✏️	⬆ ↑	No	Yes	Edit	Disable	Delete

➕ Add Grant Type   ✓ Done

Notes

Q Search 🔳 Contacts 💳 Contributions 📅 Events ✉ Mailings

Word|

▶ Word Replacements

rant Dashboard

CiviCRM Home

Hide Menu

Log out

Home > CiviCRM > Administer > Option Groups
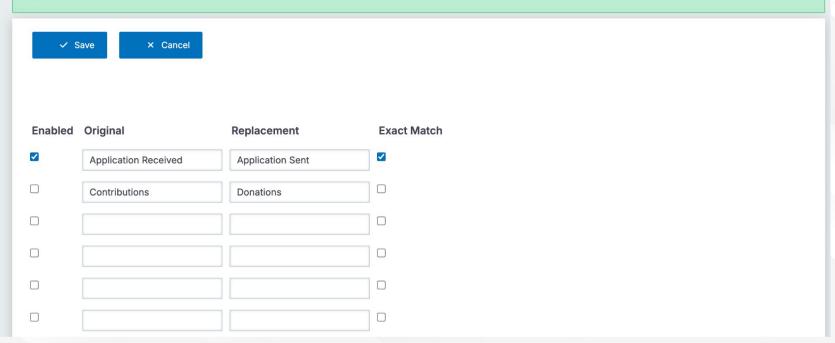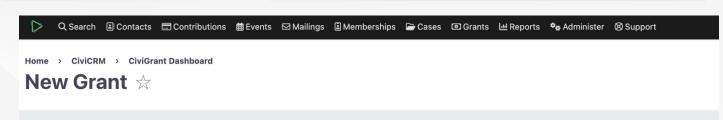
Word Replacements ☆

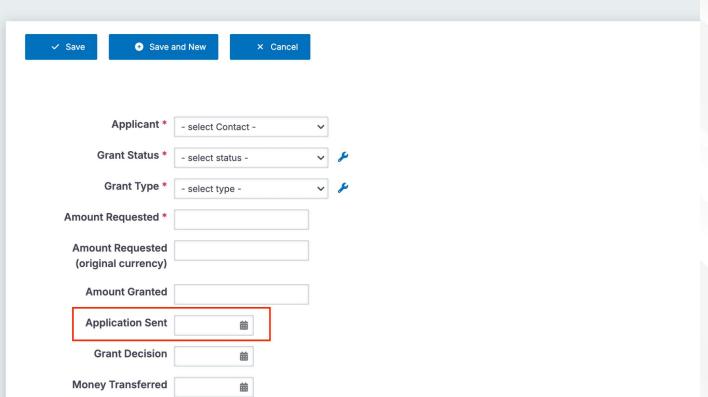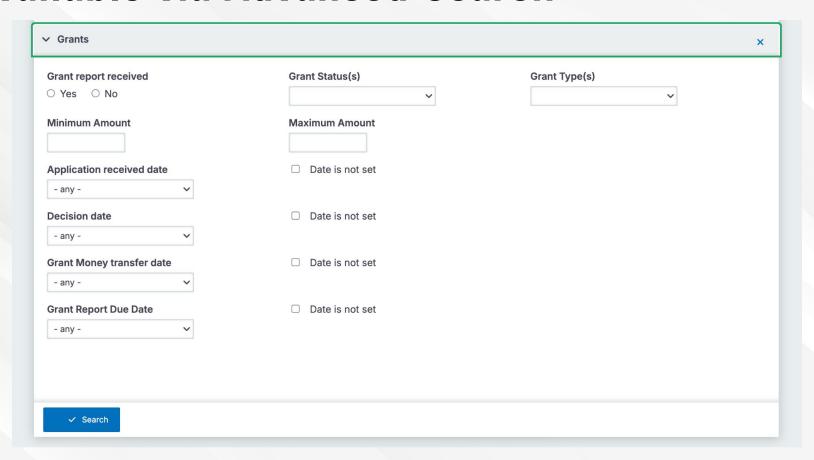Use **Word Replacements** to change all occurrences of a word or phrase in CiviCRM screens (e.g. replace all occurrences of 'Contribution' with 'Donation').
ⓘ

✓ Save	✕ Cancel

Enabled	Original	Replacement	Exact Match
☑	Application Received	Application Sent	☑
☐	Contributions	Donations	☐
☐			☐
☐			☐
☐			☐
☐			☐

Home   >   CiviCRM   >   CiviGrant Dashboard

New Grant ☆

| ✓ Save | ⊕ Save and New | ✕ Cancel |

Applicant *   `- select Contact -` ▾

Grant Status *   `- select status -` ▾   🔧

Grant Type *   `- select type -` ▾   🔧

Amount Requested *   [   ]

Amount Requested (original currency)   [   ]

Amount Granted   [   ]

Application Sent   [📅]

Grant Decision   [📅]

Money Transferred   [📅]

Available via Advanced Search

Grants

Grant report received
○ Yes   ○ No

Grant Status(s)
[▾]

Grant Type(s)
[▾]

Minimum Amount
[   ]

Maximum Amount
[   ]

Application received date
[- any - ▾]

☐ Date is not set

Decision date
[- any - ▾]

☐ Date is not set

Grant Money transfer date
[- any - ▾]

☐ Date is not set

Grant Report Due Date
[- any - ▾]

☐ Date is not set
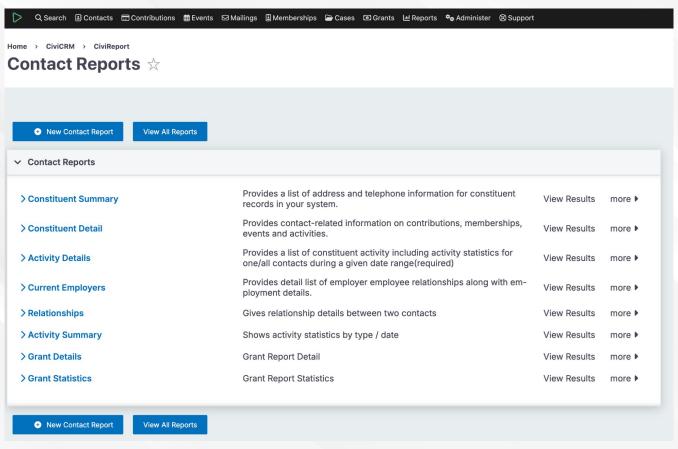
✓ Search

Starting Reports in Contact Reports

Report Settings and Dashboard Access
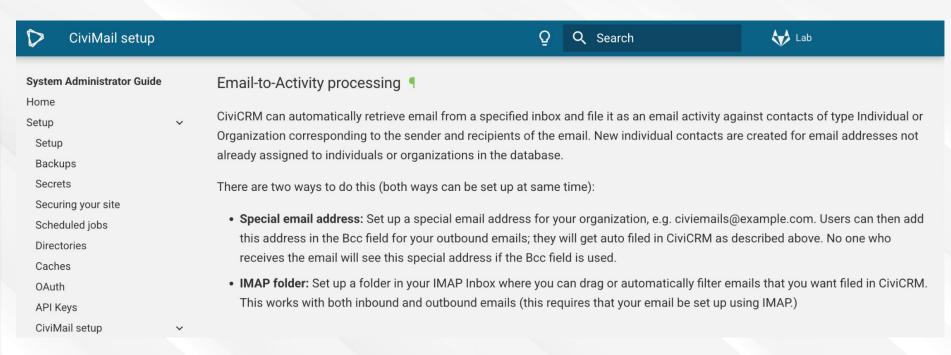
Grant Details ☆
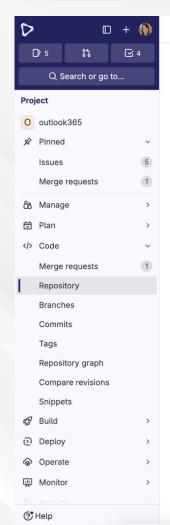
Columns	Grouping	Sorting	Filters	Title and Format	Email Delivery	**Access**

Include Report in Navigation Menu? ☐ Link to [Show Criteria ▾]
All report instances are automatically included in the Report Listing page. Check this box to also add this report to the navigation menu.

Permission ⊘ [CiviGrant: access CiviGrant ▾]

ACL Group/Role
Anonymous user
Authenticated user
Content editor
Administrator

[Add >>] [<< Remove]

Add to My Reports? ⊘ ☐ If set to Yes, this report will appear in the My Reports section of the reports listing page and will only be visible by you.

Reserved Report? ⊘ ☐ If reserved, only users with 'administer reserved reports' permission can modify this report instance.

Available for Dashboard? ⊘ ☑ Users with appropriate permissions can add this report to their dashboard.

Limit Dashboard Results ⊘ [   ] rows

Cache dashlet for ⊘ [60] minutes

CiviCRM labels can match how your organization talks about your *stuff.*

Email to Activity

Email-to-Activity Processing

Q Search

Lab

System Administrator Guide

Home

Setup ⌄

Setup

Backups

Secrets

Securing your site

Scheduled jobs

Directories

Caches

OAuth

API Keys

CiviMail setup ⌄

Email-to-Activity processing ¶

CiviCRM can automatically retrieve email from a specified inbox and file it as an email activity against contacts of type Individual or Organization corresponding to the sender and recipients of the email. New individual contacts are created for email addresses not already assigned to individuals or organizations in the database.

There are two ways to do this (both ways can be set up at same time):

- **Special email address:** Set up a special email address for your organization, e.g. civiemails@example.com. Users can then add this address in the Bcc field for your outbound emails; they will get auto filed in CiviCRM as described above. No one who receives the email will see this special address if the Bcc field is used.

- **IMAP folder:** Set up a folder in your IMAP Inbox where you can drag or automatically filter emails that you want filed in CiviCRM. This works with both inbound and outbound emails (this requires that your email be set up using IMAP.)

Project

- outlook365
- Pinned
  - Issues — 5
  - Merge requests — 1
- Manage
- Plan
- Code
  - Merge requests — 1
  - Repository
  - Branches
  - Commits
  - Tags
  - Repository graph
  - Compare revisions
  - Snippets
- Build
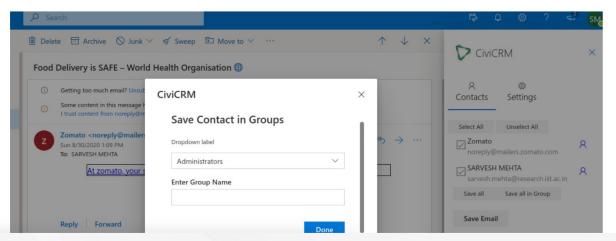- Deploy
- Operate
- Monitor
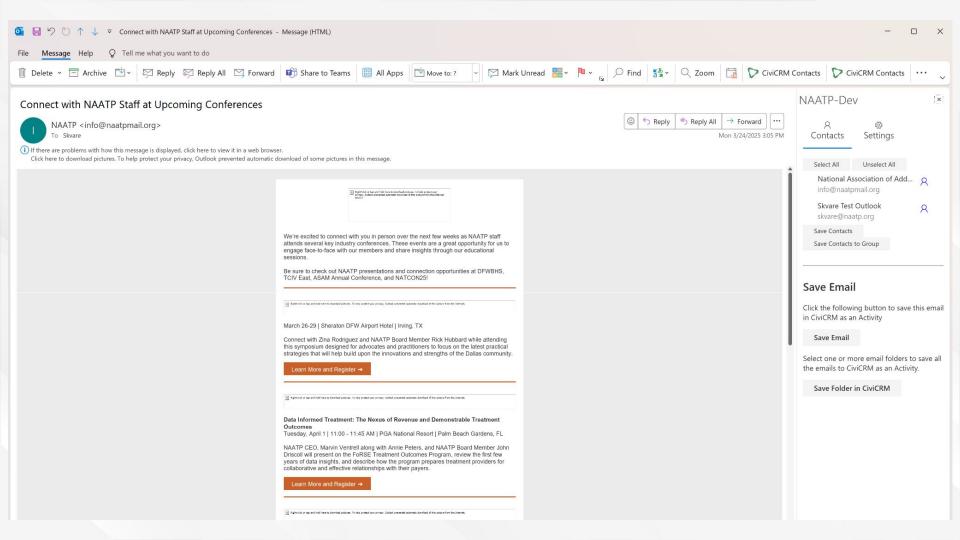- Help

Outlook 365 Integration for CiviCRM

This extension enables a user to query CiviCRM as an address book when using either Microsoft Outlook 365 Web and Desktop clients. This extension generates a Microsoft Outlook 365 add-in which connects Outlook 365 to the CiviCRM site, this add-in can be deployed organisation-wide or on a per user basis.

Features include:

- Search CiviCRM for contacts or groups.
- Search for contacts within a CiviCRM group.
- Ability to send email to all contacts in a mailing group.
- Select contacts across different mailing groups.
- Ability to CC or BCC email to one group while sending email to another group.
- Create CiviCRM contacts from the email recipients (To,CC,Sender).
- Create multiple CiviCRM contacts with a single click.
- Save multiple contacts to an existing group or create a new group in CiviCRM.
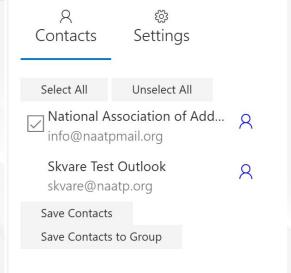- Store the current email in CiviCRM as an Activity and associate with the email recipients.

This extension is licensed under AGPL-3.0.

File   Message   Help   Tell me what you want to do

Delete | Archive | Reply | Reply All | Forward | Share to Teams | All Apps | Move to: ? | Mark Unread | CiviCRM Contacts | CiviCRM Contacts

Connect with NAATP Staff at Upcoming Conferences

NAATP <info@naatpmail.org>
To   Skvare

Reply | Reply All | Forward

Mon 3/24/2025 3:05 PM

If there are problems with how this message is displayed, click here to view it in a web browser.
Click here to download pictures. To help protect your privacy, Outlook prevented automatic download of some pictures in this message.

NAATP

We're excited to connect with you in person over the next few weeks as NAATP staff attends several key industry conferences. These events are a great opportunity for us to engage face-to-face with our members and share insights through our educational sessions.

Be sure to check out NAATP presentations and connection opportunities at DFWBHS, TCIV East, ASAM Annual Conference, and NATCON25!

March 26-29 | Sheraton DFW Airport Hotel | Irving, TX

Connect with Zina Rodriguez and NAATP Board Member Rick Hubbard while attending this symposium designed for advocates and practitioners to focus on the latest practical strategies that will help build upon the innovations and strengths of the Dallas community.

Learn More and Register ➜

Data Informed Treatment: The Nexus of Revenue and Demonstrable Treatment Outcomes
Tuesday, April 1 | 11:00 - 11:45 AM | PGA National Resort | Palm Beach Gardens, FL

NAATP CEO, Marvin Ventrell along with Annie Peters, and NAATP Board Member John Driscoll will present on the FoRSE Treatment Outcomes Program, review the first few years of data insights, and describe how the program prepares treatment providers for collaborative and effective relationships with their payers.

Learn More and Register ➜

NAATP-Dev

Contacts | Settings

Select All   Unselect All

National Association of Add...
info@naatpmail.org

Skvare Test Outlook
skvare@naatp.org

Save Contacts
Save Contacts to Group

Save Email

Click the following button to save this email in CiviCRM as an Activity.

Save Email

Select one or more email folders to save all the emails to CiviCRM as an Activity.

Save Folder in CiviCRM

"Save Email" creates email as Activity on corresponding contact record

"Save contact" creates new contact

Contacts   Settings

Select All   Unselect All

☑ National Association of Add...
info@naatpmail.org

Skvare Test Outlook
skvare@naatp.org

Save Contacts

Save Contacts to Group

Save Email

Click the following button to save this email in CiviCRM as an Activity

Save Email

Select one or more email folders to save all the emails to CiviCRM as an Activity.

Save Folder in CiviCRM

Questions

Get Support

skvare.com

info@skvare.com

civicrm.org/civicrm/experts

chat.civicrm.org