

# CiviCRM secrets for Drupalers!

What are you missing out on?



# Hi! I'm David Snopek

- (Co-)Maintainer of 20+ projects on Drupal.org
- Member of the Drupal Security Team
- Co-Organizer of the [Drupal414 meetup](#)
- Co-Founder of [myDropWizard](#)
- Sasza and Ewa's Tata



Sasza & Ewa

# Here's Will Long

- Chicago-based Drupal consultant
- The Features Builder guy
- Co-Founder of [myDropWizard](#)



# Elliot Christenson in the haus!

- Co-Founder of [myDropWizard](#)
- On Drupal.org for 10 years 5 months
- David says that is like 12 years or something!



# Our Story

Or, how we accidentally fell into CiviCRM



# We've done A LOT of Drupal

- 30-ish years of Drupal experience between us
- Elliot, Will & I co-founded [myDropWizard](#)
- We do support & maintenance for Drupal 6, 7 & 8 sites
- We make [Roundearth.io](#) a Drupal 8 + CiviCRM distro and SaaS service
  - More on this later...



# BUT, CiviCRM is actually pretty new to us!

- We fell into it accidentally ;-)
- About 40% of our support & maintenance customers are nonprofits
- About 50% of them use CiviCRM
- CiviCRM is *part of the site* (a Drupal module)
- So... We had to support it!



# We saw how much value CiviCRM was providing our customers

- CiviCRM is *more* important to them, than Drupal
- Drupal helps them explain their mission (marketing)
- CiviCRM helps them enact their mission (action)
- Creating content once a week; interacting with constituents everyday



# Why don't more Drupalers know about it?

- We knew a little...
- ... it's like a CRM, right?
- But not knowing about it means, you don't know if it could help
- Maybe it could provide value to YOU or YOUR CUSTOMERS too?



# So, that's the idea behind this presentation

- We're gonna show you some of the coolest stuff we've learned about CiviCRM
  - WYSIWYG email newsletter creation
  - CiviCRM API, Angular and some other tech stuff
  - Membership management
- Then maybe you'll be excited about CiviCRM too :-)



# If you have any questions...

... please SHOUT THEM OUT!



# What is CiviCRM?

- [CiviCRM](#) is an **C**onstituent **R**elationship **M**anagement (CRM) system
- Primarily for nonprofit or civic organizations
- Embeds into Drupal (6, 7 & 8) or Wordpress, Joomla and Backdrop
  - ... as a *module* (or plugin or whatever), not remote connection
- And it's Open Source!



# Uh... What's a CRM?

Sorry, if you already know this stuff :-)



# What is a CRM? (Contacts and fields!)

David Snopek

Gender: Male  
Address: Milwaukee, WI  
Email: [david.snopek@example.com](mailto:david.snopek@example.com)  
Com. Pref: Email

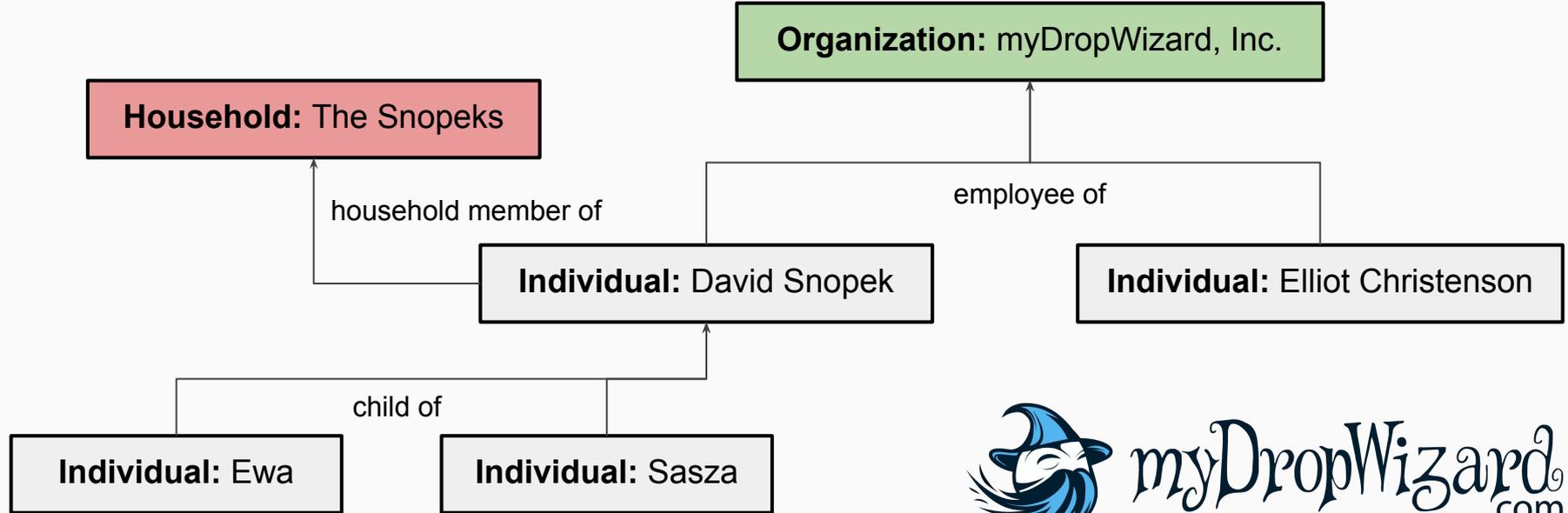
Elliot Christenson

Gender: Male  
Address: Green Bay, WI  
Email: [elliott.christenson@example.com](mailto:elliott.christenson@example.com)  
Com. Pref: Phone

- You can add custom fields, just like in Drupal!



# What is a CRM? (Types and relationships)



# What is a CRM? (Groups)

## On the mailing list

**Individual:** Elliot Christenson

**Individual:** David Snopek

## Midwest Region

**Individual:** Elliot Christenson

**Individual:** David Snopek



# What is a CRM? (Activities)

**Individual:** David Snopek

**Email sent on 2018-01-27**

From: guy@example.com  
Subject: "Would you like to join?"  
Body: "Our association of Drupal..."

**Called on 2018-02-04**

"Asked about shipment of t-shirt and when he can expect it"

**Meeting scheduled for 2018-02-28**

Agenda: "Addressing concerns regar..."



# What is a CRM?

## (Doing stuff with all that data!)

- Send a newsletter to everyone in a particular group or certain fields
- Open and track a “case” through various stages
- Coordinate events (with RSVP, payment, recording attendance, etc)
- Manage membership (start/end date, recurring payment, levels)
- Reporting (who’s membership is ending, who haven’t we heard from, etc)
- HR (manage employees or volunteers)



CRM's are coool!

But couldn't we do that in Drupal?

# You could make a CRM in pure Drupal

- Drupal provides a flexible framework to build ... anything!
- Why not put some fields on some entities and make a CRM?
- You *could*. For example:
  - [CRM Core](#)
  - [RedHen CRM](#)
- But... IMO... CiviCRM is better :-)



# CiviCRM community is larger

- 4 full-time people on CiviCRM core team
- [CiviCon's and CiviCamps](#) and monthly meetups - all over the world
- [Multiple books written about CiviCRM](#)
- [~70 partner/contributor organizations](#)
  - Training, hosting, support & maintenance, custom development



# CiviCRM is a complete product

- Most Drupal modules are legos
- CRM Core & Redhen could be used to build a CRM
- They aren't complete CRM's on their own
- You *could* make a CRM in Drupal as complete as CiviCRM...
  - ... but why do that for every site?



# CiviCRM is well suited to nonprofits

- Different CRMs have different audiences in mind
- CiviCRM could work for any organization, but is KILLER for nonprofits
- CRM Core and Redhen are also geared towards nonprofits!
  - But this is Drupal - they are still pretty generic :-)



# CiviCRM has less “vendor lock-in”

- Upgrading from Drupal versions 6 -> 7 -> 8 is *hard*
- The same version of CiviCRM works in all three versions
- It can even work in Wordpress, Joomla or Backdrop
- You can move your CiviCRM *unchanged* between any of those!!!
  - Caveat: Except for Drupal modules that integrate with CiviCRM
  - CiviCRM extensions vs. Drupal modules



Ok, let's see some stuff!

**EMAIL  
NEWSLETTER  
BUILDER**

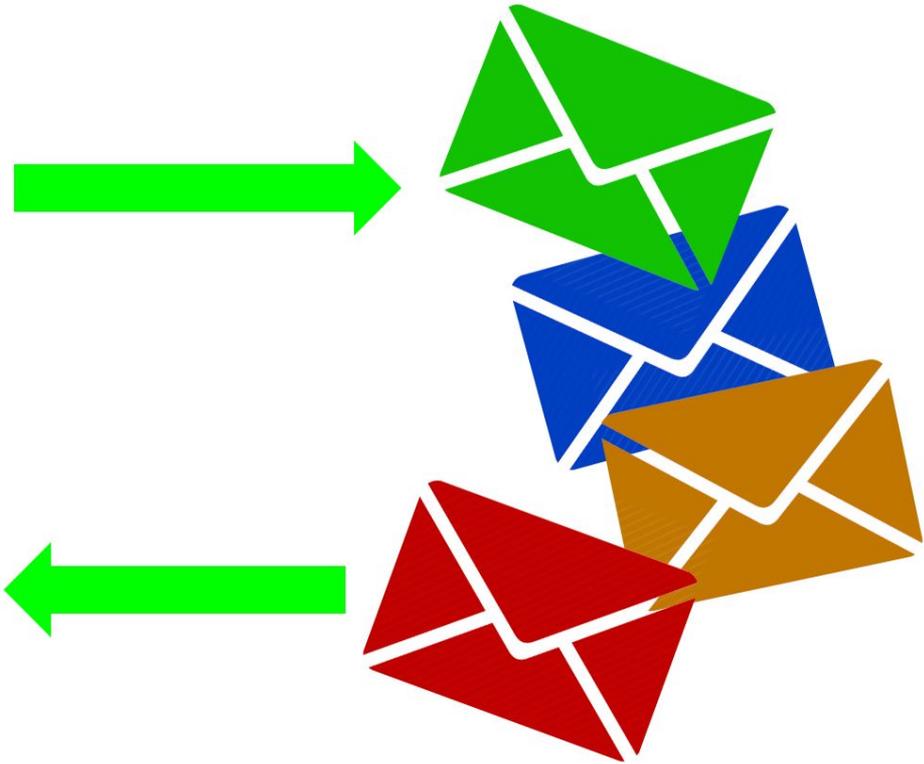
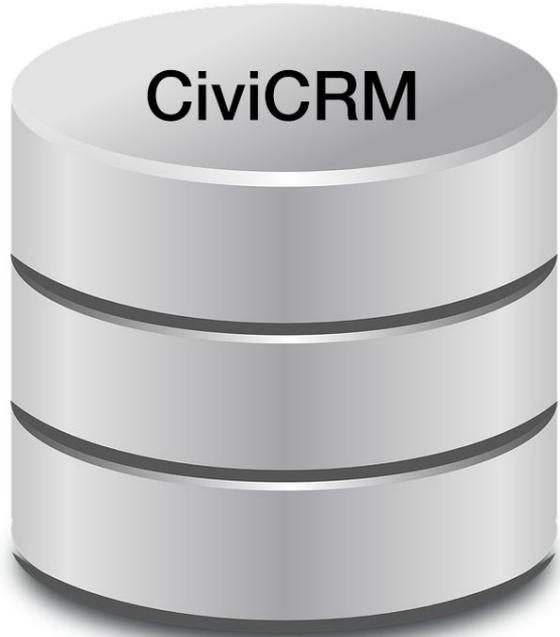


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Memberships

Reports

Administer

New Mailing

Draft and Unscheduled Mailings

Scheduled and Sent Mailings

Archived Mailings

Mailing Reports

Headers, Footers, and Automated Messages

Message Templates

From Email Addresses

New SMS

Find Mass SMS

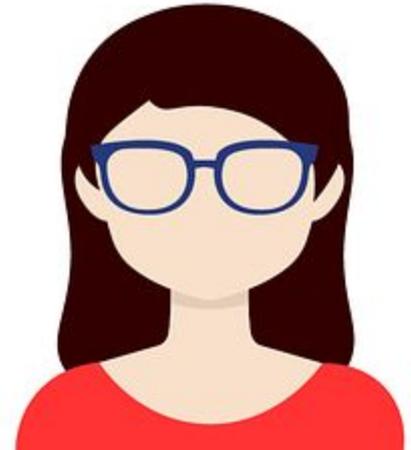
New A/B Test

Manage A/B Tests

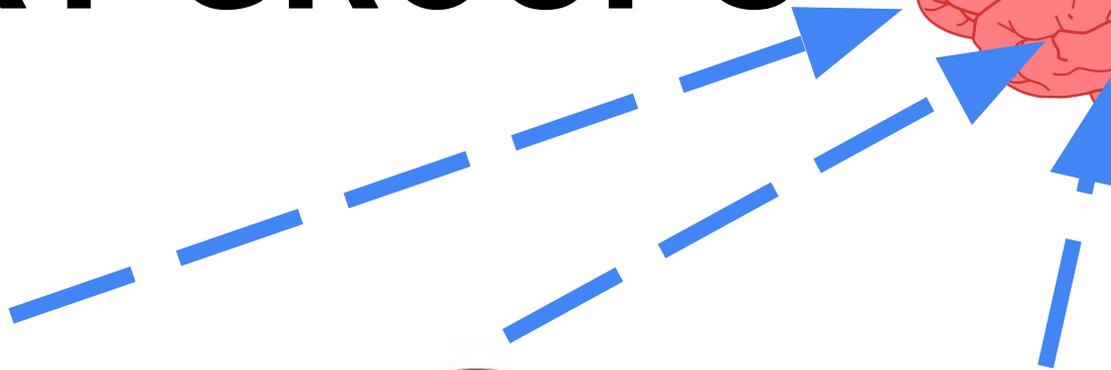
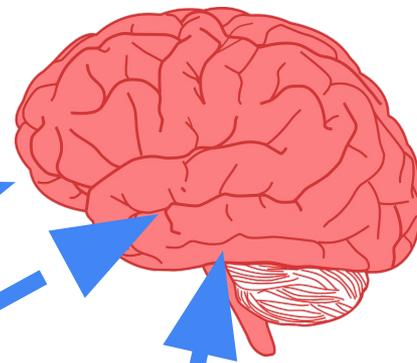
Mosaico Templates

New Mailing (Traditional)

# GROUPS



# SMART GROUPS





Use Any Search!

**(SMART) DEMO!**

# The Tech Stuff™

Kind of a random “grab bag” of what I think is cool :-)



# Development process

- Drupal does complete, major rewrites (ala Drupal 8)
  - CiviCRM does not!
- CiviCRM core is improved iteratively only
- “Leap By Extension”
  - Big, revolutionary changes are only done in extensions
  - Example: the newsletter stuff was actually an extension



# API First!

- Drupal 8 has an [API First initiative](#)
- Everything that's possible inside Drupal, should also be possible via the REST API
- CiviCRM already has this!!
- And a really sweet API Explorer :-)
  - It's demo time!



# Angular

- Angular (or React or Vue.js) are powerful Javascript UI libraries
  - Used to make rich, interactive applications (Gmail-esque, desktop-like apps)
- Drupal 8 has the proposed [JavaScript Framework initiative](#)
  - Rebuild some admin UIs with React or Vue.js
  - There's an experimental version of "Recent log entries" with Vue, but otherwise it's just talk
- CiviCRM is already doing this with Angular!!!
  - Goes well with the CiviCRM API



# Drupal + CiviCRM vs “the cloud”

- What about integrating Drupal with ... Salesforce ... or \_\_\_\_?
- The reason: tighter and easier integration!



# Drupal integration stuff (1/2)

- CiviCRM is part of your Drupal site
  - Only one place to go for everything
- Some CiviCRM contacts can have Drupal users and log in
  - Can update some of their own profile information in CiviCRM!
- Users can get Drupal roles based on CiviCRM groups or membership
  - And hence access different content or functionality



# Drupal integration stuff (2/2)

- CiviCRM Entity
  - Interact with Drupal entities that are actually CiviCRM entities
- CiviCRM Views
  - Make custom lists of data out of the CRM
- CiviCRM Rules
  - When things happen in Drupal, do something in CiviCRM (or vice versa)



**MEMBERSHIP**

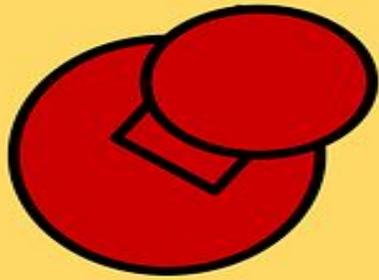


Sign-Up Forms

Members Only



# Payment Integration



# Remember!

Automatic Reminders



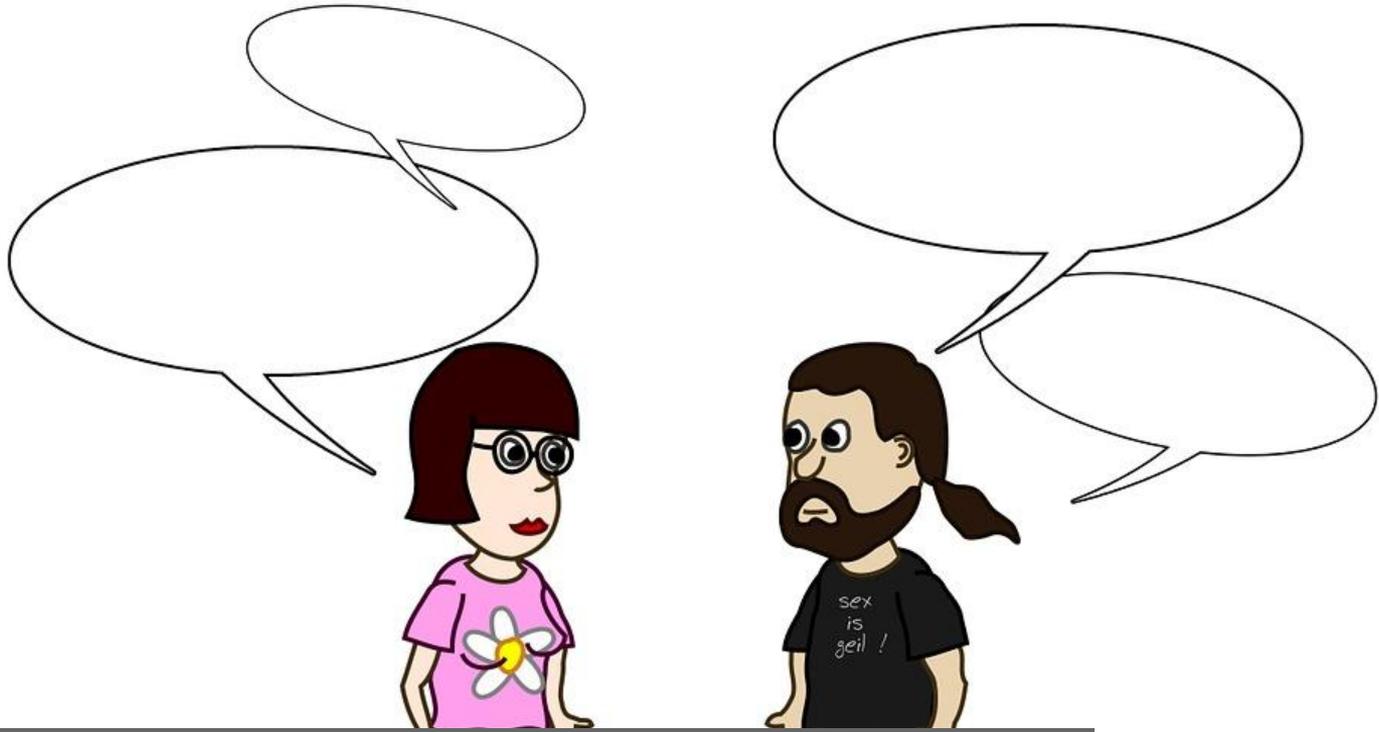
Drupal™



CIVICRM



Import/Export



Communicate



# Member Directory

**DEMO MEMBERSHIP**

# Roundearth.io

Drupal 8 + CiviCRM (distro and hosted SaaS)



# What is Roundearth? (the Drupal side)

- Drupal 8, configured with features needed by non-profits
  - Powerful media support
  - Image carousels
  - Photo galleries
  - Rich WYSIWYG
  - News & Pages (optional: content workflow)
  - SEO
  - ... a bunch more!



# What is Roundearth? (the CiviCRM side)

- CiviCRM, with best extensions and common configuration for:
  - Events
  - Donations
  - Email newsletters
  - Volunteer coordination
  - ... and more!



# We have 10 sites in our BETA!

- We [offered a FREE migration](#) to Drupal 8 to 10 nonprofits
  - 3 sites are currently live!
  - 4 are mostly done (final review and approval - will be live soon)
  - 3 still in the works
- Might do a 2nd round of BETA customers after DrupalCon
- We plan to make it generally available in December



# If you want to learn more...

- Check out [Roundearth.io](https://Roundearth.io)
- [The code is on GitLab](#)
- Join the mailing list or [contact us!](#)
- Or just come say “hi” :-)



# Koniec!

Questions? Comments?

