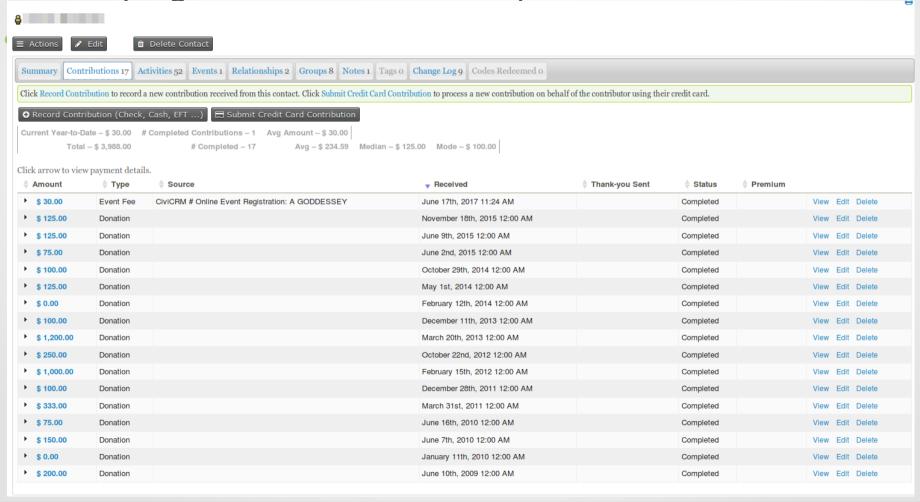# Better Living through Extensions

Jon Goldberg
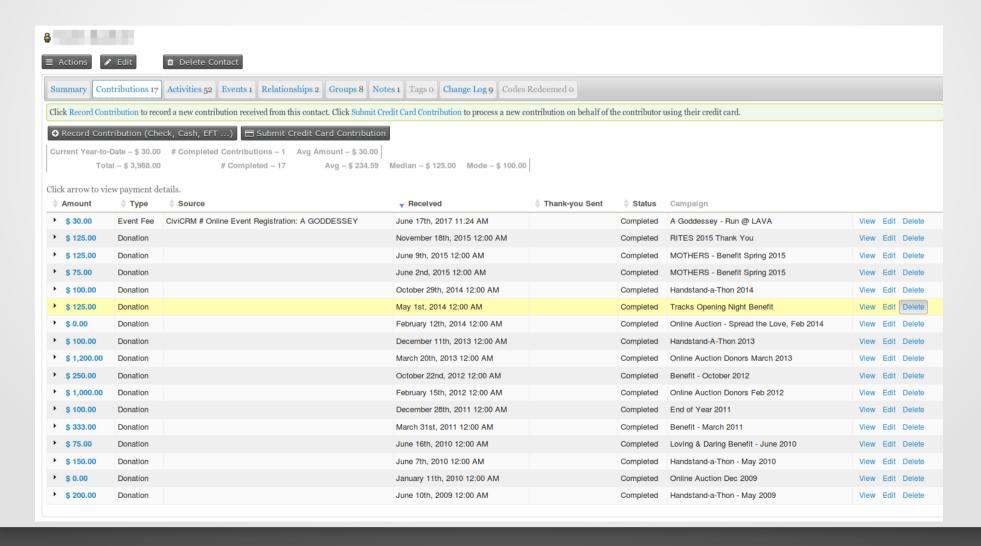Megaphone Technology Consulting

What are we covering here?

- A NON-technical discussion of extensions.

- A tour of the public, private, and semi-private extension ecosystems.

- A peek into the future of extensions.

- I'm keeping this short – lots of Q&A time.

What is an extension?

- It's a way to add (or remove!) functionality from CiviCRM.

- It can be literally anything. Some examples:

    - "This report in CiviCRM almost meets my needs, but I need to add new fields."

    - "If the person making a donation is a major donor, show them a different set of price options."

    - "I want to use a new payment processor, but it's not built in to CiviCRM."

    - "I want to automatically look up and contact someone's elected officials when they fill out a petition."
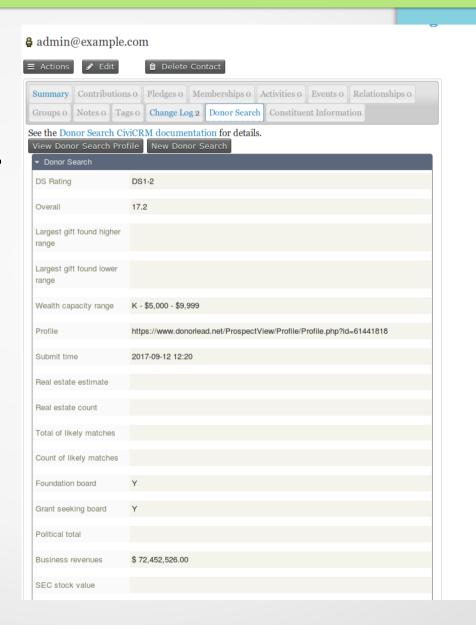
What is an extension?

- They can use information stored in CiviCRM (e.g. "Campaign in Contribution Tab").

Actions Edit Delete Contact

Summary | Contributions 17 | Activities 52 | Events 1 | Relationships 2 | Groups 8 | Notes 1 | Tags 0 | Change Log 9 | Codes Redeemed 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 Year-to-Date – $ 30.00   # Completed Contributions – 1   Avg Amount – $ 30.00
Total – $ 3,988.00   # Completed – 17   Avg – $ 234.59   Median – $ 125.00   Mode – $ 100.00

Click arrow to view payment details.

	Amount	Type	Source	Received	Thank-you Sent	Status	Premium			
▸	$ 30.00	Event Fee	CiviCRM # Online Event Registration: A GODDESSEY	June 17th, 2017 11:24 AM		Completed		View	Edit	Delete
▸	$ 125.00	Donation		November 18th, 2015 12:00 AM		Completed		View	Edit	Delete
▸	$ 125.00	Donation		June 9th, 2015 12:00 AM		Completed		View	Edit	Delete
▸	$ 75.00	Donation		June 2nd, 2015 12:00 AM		Completed		View	Edit	Delete
▸	$ 100.00	Donation		October 29th, 2014 12:00 AM		Completed		View	Edit	Delete
▸	$ 125.00	Donation		May 1st, 2014 12:00 AM		Completed		View	Edit	Delete
▸	$ 0.00	Donation		February 12th, 2014 12:00 AM		Completed		View	Edit	Delete
▸	$ 100.00	Donation		December 11th, 2013 12:00 AM		Completed		View	Edit	Delete
▸	$ 1,200.00	Donation		March 20th, 2013 12:00 AM		Completed		View	Edit	Delete
▸	$ 250.00	Donation		October 22nd, 2012 12:00 AM		Completed		View	Edit	Delete
▸	$ 1,000.00	Donation		February 15th, 2012 12:00 AM		Completed		View	Edit	Delete
▸	$ 100.00	Donation		December 28th, 2011 12:00 AM		Completed		View	Edit	Delete
▸	$ 333.00	Donation		March 31st, 2011 12:00 AM		Completed		View	Edit	Delete
▸	$ 75.00	Donation		June 16th, 2010 12:00 AM		Completed		View	Edit	Delete
▸	$ 150.00	Donation		June 7th, 2010 12:00 AM		Completed		View	Edit	Delete
▸	$ 0.00	Donation		January 11th, 2010 12:00 AM		Completed		View	Edit	Delete
▸	$ 200.00	Donation		June 10th, 2009 12:00 AM		Completed		View	Edit	Delete

What is an extension?

- With extension applied:

What is an extension?

- They can use
outside info
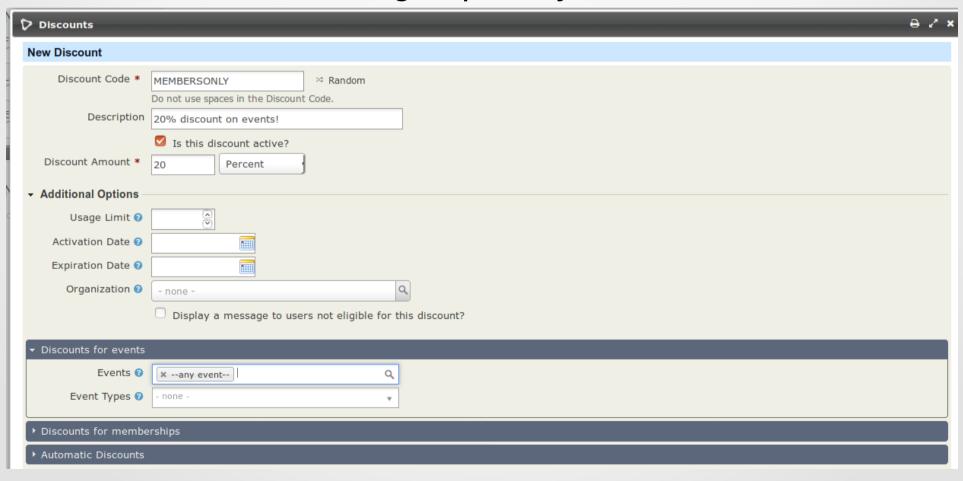(e.g. "Donor Search").

The three extension ecosystems

- Public, private, and semi-private extensions exist. They all have their own ecosystem. Let's tour each.

Public extensions

- Someone has solved a common problem, and they want to share it with the world!

- Many (not all) public extensions can be browsed and installed directly from within CiviCRM.

- Let's do a whirlwind tour of the most popular public extensions, because you might want one of these right away.

CiviDiscount

- Discount codes, coupons, automatic discounts for logged-in users based on the groups they're in.

Stripe

- Adds Stripe as a payment processor option to Civi.

New Payment Processor

✔ Save   ✖ Cancel

Payment Processor Type *
```
PayPal - Website Payments Pro
```
Stripe
Authorize.Net
DPS Payment Express
Elavon Payment Processor
eWAY (Single Currency)
FirstData (aka linkpoint)
PayflowPro
PayJunction
PayPal - Express
PayPal - Website Payments Pro
PayPal - Website Payments Standard
Realex Payment
Dummy Payment Processor

Name *

Description

Financial Account *

Payment Method

Accepted Credit Card Type(s)

Processor Details for Li

User Name

Password

Signature

CiviMobile

- A phone-friendly Civi interface

And more...

- Extended Reports: A collection of helpful reports that go beyond those that come with CiviCRM.

- CiviCRM Report Error: Send an email to someone when there's an error in the CiviCRM log.

- Multisite: For organizations with branches or chapters that are autonomous from each other – they can all get their own CiviCRM, but the head office sees all the data together.

A special mention to "No Overwrite"

- Have you (or your staff) ever entered a donation for someone else through the public page while logged in? Did your record and the donor's record get mushed together? "No Overwrite" is the extension for you!

More public extensions!

- That was just eight of the public extensions. There are dozens for public distribution, and hundreds in the directory – go browse!

- Those that are approved for automated distribution are available from within CiviCRM.

- There's plenty more at https://civicrm.org/extensions!

Private Extensions

- Sometimes, you have a need that's specific to your organization.

- You can hire someone to write an extension to solve it for you.

- Private extensions don't need the polish of public extensions – so they can be quick and cheap. Useful extensions can be written in as little as 20 minutes!

Required Duration

- "Required Duration" extension – 4 lines of code makes this field required. A 20 minute extension saved hours of fixing data on reports months after the fact.

Private extensions

- Private extensions are a great way to get something that works 98% out of the box to 100% functional.

- Unfortunately, you need to be a programmer to write them.

- With one cool exception! We'll get there soon.

- Find extension developers at https://civicrm.org/providers (filter "Services" to "Custom code and extensions").

Semi-private extensions

- Writing a public extension is a lot of work. It needs polish and peer review.

- Therefore, more extensions are never published!

- However, you can find them on Github. Let's take a look.

Github users with semi-private extensions

- https://github.com/totten
- https://github.com/TechToThePeople
- https://github.com/veda-consulting
- https://github.com/MegaphoneJon (me!)
- https://github.com/CiviCooP
- https://github.com/JMAConsulting
- https://github.com/eileenmcnaughton
- ..and more!

Installing semi-private extensions

- I'm not going to cover this in depth – it IS technical.

    - Find your Extensions directory (**Administer menu » System Settings » Directories**)

    - Download the extension's zip file from Github.

    - Unzip the extension and upload it to your server in the extension directory.

    - Go to **Administer menu » Extensions** and press "Refresh". You should see the new extension.

When is an extension not an extension?

- There are other ways to customize CiviCRM. Many are "old" approaches from before extensions were possible.

- However, you can also extend CiviCRM in a CMS-specific way (WordPress plugin, a Drupal module, a Backdrop module, a Joomla extension).

- Don't do this unless you're doing something specific to that CMS!

- However, some of the very coolest features of Civi are CMS integration plugins, like "Webform CiviCRM" or "Views Integration" or "WooCommerce CiviCRM".

The future of extensions

- Core functionality split into extensions. For two reasons:
  - Adding next-generation functionality while allowing slower-moving organizations to keep their old setups.
    - Mosaico is the best example of this – it will likely replace the built-in CiviMail eventually.
  - Moving little-used functionality out of the core.
    - This prevents a bug in, e.g., CiviGrants from affecting non-CiviGrants users.
  - I'll show another example at the lightning talk.
- Paid extensions?

CiviRules

- CiviRules is a special extension. It's a sort of no-coding extension builder. It lets you create new actions in CiviCRM that used to require their own extension.

- This is NOT a non-technical extension – but it lowers the barrier. If you understand CiviCRM but not coding, you can build rules.

  - E.g. "Whenever someone donates $500 or more, send an email to the Director of Development".

- While it can only do a small fraction of the things a full extension can do, it can do many of the most common things you need without any coding.

- CiviRules is designed for moves management (aka "donor journeys", "sales funnel", "engagement ladder", etc.). Good for creating "drip marketing campaigns".