

Better Living through Extensions



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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”).

The screenshot displays the CiviCRM interface for a contact's contribution history. At the top, there are navigation tabs: Summary, Contributions 17, Activities 52, Events 1, Relationships 2, Groups 8, Notes 1, Tags 0, Change Log 9, and Codes Redeemed 0. Below the tabs, there are two buttons: "Record Contribution (Check, Cash, EFT ...)" and "Submit Credit Card Contribution". A summary bar shows: "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". Below this, a table lists individual contributions with columns for Amount, Type, Source, Received, Thank-you Sent, Status, and Premium. Each row includes a "View Edit Delete" link.

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	
\$ 125.00	Donation		November 18th, 2015 12:00 AM		Completed	
\$ 125.00	Donation		June 9th, 2015 12:00 AM		Completed	
\$ 75.00	Donation		June 2nd, 2015 12:00 AM		Completed	
\$ 100.00	Donation		October 29th, 2014 12:00 AM		Completed	
\$ 125.00	Donation		May 1st, 2014 12:00 AM		Completed	
\$ 0.00	Donation		February 12th, 2014 12:00 AM		Completed	
\$ 100.00	Donation		December 11th, 2013 12:00 AM		Completed	
\$ 1,200.00	Donation		March 20th, 2013 12:00 AM		Completed	
\$ 250.00	Donation		October 22nd, 2012 12:00 AM		Completed	
\$ 1,000.00	Donation		February 15th, 2012 12:00 AM		Completed	
\$ 100.00	Donation		December 28th, 2011 12:00 AM		Completed	
\$ 333.00	Donation		March 31st, 2011 12:00 AM		Completed	
\$ 75.00	Donation		June 16th, 2010 12:00 AM		Completed	
\$ 150.00	Donation		June 7th, 2010 12:00 AM		Completed	
\$ 0.00	Donation		January 11th, 2010 12:00 AM		Completed	
\$ 200.00	Donation		June 10th, 2009 12:00 AM		Completed	

What is an extension?

- With extension applied:

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	Campaign	
\$ 30.00	Event Fee	CIVICRM # Online Event Registration: A GODDESSEY	June 17th, 2017 11:24 AM		Completed	A Goddessy - Run @ LAVA	View Edit Delete
\$ 125.00	Donation		November 18th, 2015 12:00 AM		Completed	rites 2015 Thank You	View Edit Delete
\$ 125.00	Donation		June 9th, 2015 12:00 AM		Completed	MOTHERS - Benefit Spring 2015	View Edit Delete
\$ 75.00	Donation		June 2nd, 2015 12:00 AM		Completed	MOTHERS - Benefit Spring 2015	View Edit Delete
\$ 100.00	Donation		October 29th, 2014 12:00 AM		Completed	Handstand-a-Thon 2014	View Edit Delete
\$ 125.00	Donation		May 1st, 2014 12:00 AM		Completed	Tracks Opening Night Benefit	View Edit Delete
\$ 0.00	Donation		February 12th, 2014 12:00 AM		Completed	Online Auction - Spread the Love, Feb 2014	View Edit Delete
\$ 100.00	Donation		December 11th, 2013 12:00 AM		Completed	Handstand-A-Thon 2013	View Edit Delete
\$ 1,200.00	Donation		March 20th, 2013 12:00 AM		Completed	Online Auction Donors March 2013	View Edit Delete
\$ 250.00	Donation		October 22nd, 2012 12:00 AM		Completed	Benefit - October 2012	View Edit Delete
\$ 1,000.00	Donation		February 15th, 2012 12:00 AM		Completed	Online Auction Donors Feb 2012	View Edit Delete
\$ 100.00	Donation		December 28th, 2011 12:00 AM		Completed	End of Year 2011	View Edit Delete
\$ 333.00	Donation		March 31st, 2011 12:00 AM		Completed	Benefit - March 2011	View Edit Delete
\$ 75.00	Donation		June 16th, 2010 12:00 AM		Completed	Loving & Daring Benefit - June 2010	View Edit Delete
\$ 150.00	Donation		June 7th, 2010 12:00 AM		Completed	Handstand-a-Thon - May 2010	View Edit Delete
\$ 0.00	Donation		January 11th, 2010 12:00 AM		Completed	Online Auction Dec 2009	View Edit Delete
\$ 200.00	Donation		June 10th, 2009 12:00 AM		Completed	Handstand-a-Thon - May 2009	View Edit Delete

What is an extension?

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

The screenshot displays a CiviCRM interface for a user named 'admin@example.com'. The interface includes a top navigation bar with 'Actions', 'Edit', and 'Delete Contact' buttons. Below this is a tabbed menu with options like 'Summary', 'Contributions 0', 'Pledges 0', 'Memberships 0', 'Activities 0', 'Events 0', 'Relationships 0', 'Groups 0', 'Notes 0', 'Tags 0', 'Change Log 2', 'Donor Search', and 'Constituent Information'. The 'Donor Search' tab is active, showing a link to 'View Donor Search Profile' and a 'New Donor Search' button. The main content area is a table with the following data:

Donor Search	
DS Rating	DS1-2
Overall	17.2
Largest gift found higher range	
Largest gift found lower range	
Wealth capacity range	K - \$5,000 - \$9,999
Profile	https://www.donorlead.net/ProspectView/Profile/Profile.php?id=61441818
Submit time	2017-09-12 12:20
Real estate estimate	
Real estate count	
Total of likely matches	
Count of likely matches	
Foundation board	Y
Grant seeking board	Y
Political total	
Business revenues	\$ 72,452,526.00
SEC stock value	

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.

The screenshot shows the 'New Discount' form in the CiviDiscount interface. The form is titled 'New Discount' and is located within a window titled 'Discounts'. The form fields are as follows:

- Discount Code ***: A text input field containing 'MEMBERSONLY'. To the right of the field is a 'Random' button with a double arrow icon. Below the field is the instruction: 'Do not use spaces in the Discount Code.'
- Description**: A text input field containing '20% discount on events!'.
- Is this discount active?**: A checked checkbox.
- Discount Amount ***: A text input field containing '20' and a dropdown menu set to 'Percent'.
- Additional Options**: A section with a downward arrow icon, containing:
 - Usage Limit**: A dropdown menu.
 - Activation Date**: A date picker.
 - Expiration Date**: A date picker.
 - Organization**: A dropdown menu with '- none -' selected and a search icon.
 - Display a message to users not eligible for this discount?
- Discounts for events**: A section with a downward arrow icon, containing:
 - Events**: A dropdown menu with 'x --any event--' selected and a search icon.
 - Event Types**: A dropdown menu with '- none -' selected.
- Discounts for memberships**: A section with a rightward arrow icon.
- Automatic Discounts**: A section with a rightward arrow icon.

Stripe

- Adds Stripe as a payment processor option to Civi.

New Payment Processor

✓ Save ✕ Cancel

Payment Processor Type ?

Name * **Stripe**

Description DPS Payment Express

Financial Account * Elavon Payment Processor

Payment Method eWAY (Single Currency)

Accepted Credit Card Type(s) FirstData (aka linkpoint)

Processor Details for Li PayflowPro

User Name PayJunction

Password PayPal - Express

Signature PayPal - Website Payments Pro in accept

PayPal - Website Payments Standard

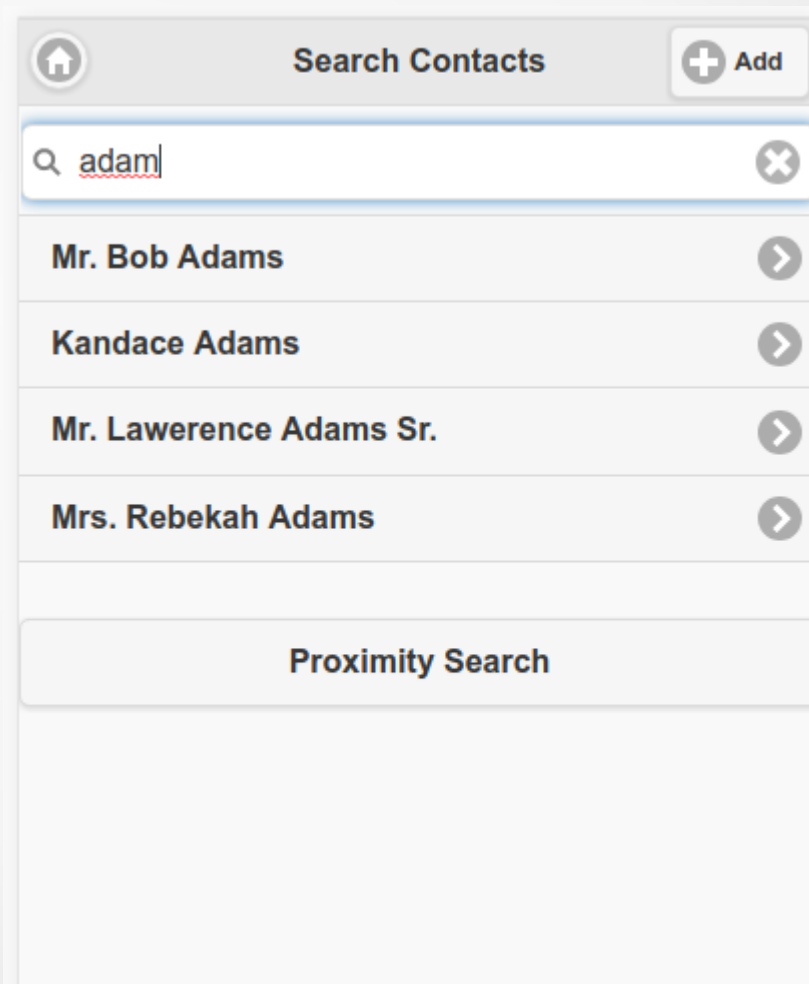
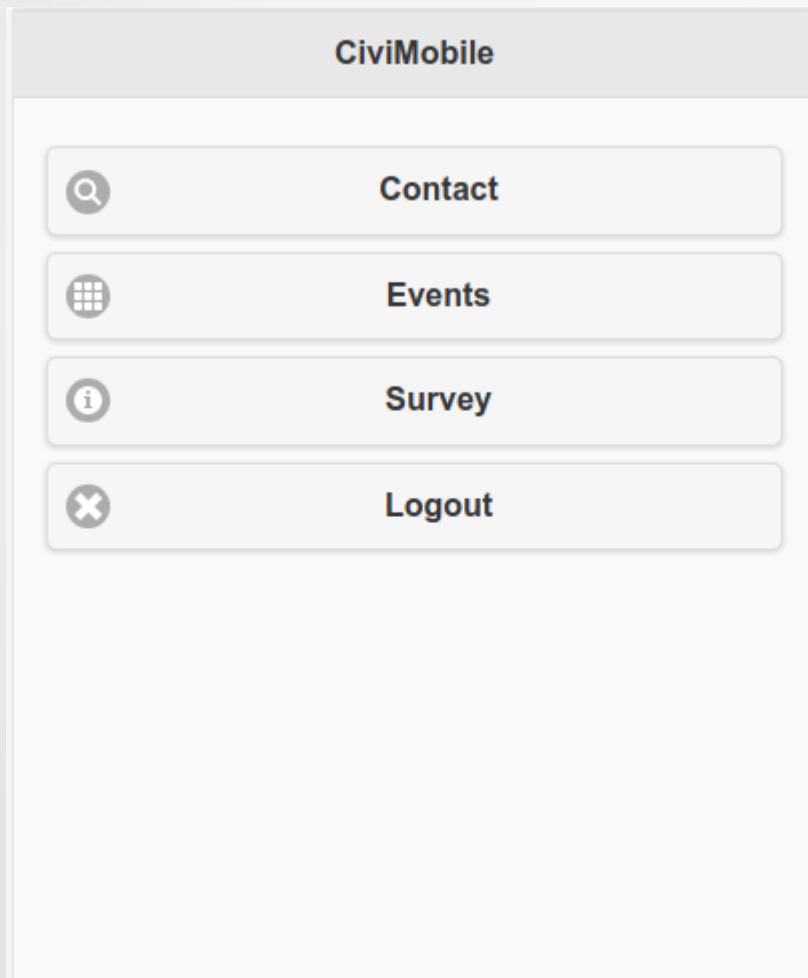
Realex Payment

Dummy Payment Processor

? ?

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 mashed together? “No Overwrite” is the extension for you!

More public extensions!

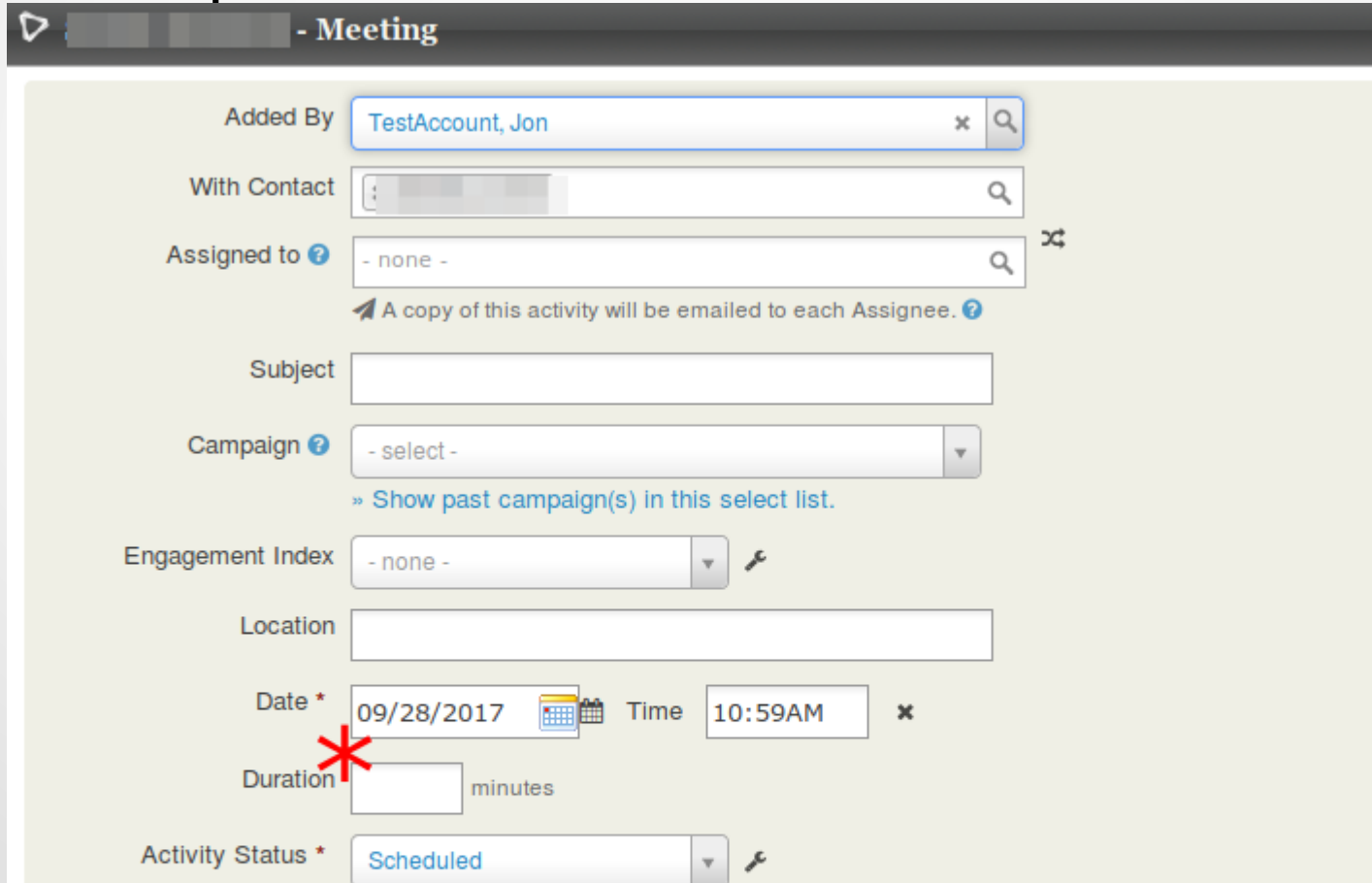
- That was just eight of the public extensions. There are dozens for public distribution, and hundreds in the directory – go browse!
- Those that are approved for automated distribution are available from within CiviCRM.
- There's plenty more at <https://civicrm.org/extensions>!

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.



The screenshot shows a CRM form for a meeting activity. The form includes the following fields and controls:

- Added By:** TestAccount, Jon (with a search icon and a close 'x' button)
- With Contact:** (with a search icon)
- Assigned to:** - none - (with a search icon and a close 'x' button)
- Subject:** (empty text input)
- Campaign:** - select - (with a dropdown arrow and a link: » Show past campaign(s) in this select list.)
- Engagement Index:** - none - (with a dropdown arrow and a wrench icon)
- Location:** (empty text input)
- Date:** 09/28/2017 (with a calendar icon and a close 'x' button)
- Time:** 10:59AM (with a close 'x' button)
- Duration:** (empty input) minutes (with a red asterisk indicating it is required)
- Activity Status:** Scheduled (with a dropdown arrow and a wrench icon)

A red asterisk is placed over the Duration field, indicating it is a required field.

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”.