

Fast Action Links extension

A love letter to CiviCRM



From: Jon Goldberg
To: CiviCRM



I Love CiviCRM



- This community is amazing.
- I love seeing the amazing work people are doing facilitated by it.
- But let me show you something I don't like.

Application Review Process

I organize a salon with two other folks.
Attendance is free – but by invitation only.
Want an invite? We have an online application.

- Civi is great for setting up applications via profile webform, Drupal webform, Caldera webform.
- However, the application review process is terrible.

Why is this so hard?

Review a list of applicants, put them in one of 3 buckets.

- Accepted – 1) Add to an “Accepted” group. 2) Remove from “Applicants” group. 3) Send a welcome email. 4) Register for upcoming salon.
- Rejected – 1) Add to a “Rejected” group. 2) Remove from “Applicants” group. 3) Send a form rejection.
- Need more info – 1) Send a form email.

LOTS of my clients have had similar workflows.

Review process – step 2

Add them to an “Accepted” list

Add Contacts to A Group

Add Contact To Existing Group Create New Group

Select Group* - select group -

Number of selected contacts
[View Selected Contacts](#)

- select group -
- Administrators
- All Contacts
- Applicants
- Master list**
- RSVP list
- unsub

Bzzzt - wrong!

It's almost impossible to search for someone who's newly added to the "Accepted" group.

To send JUST them an email, you either a) need a temporary group or b) a pad of paper.

Add Contacts to A Group

Add Contact To Existing Group Create New Group

Select Group* - select group -

Number of selected contacts: 0

[View Selected Contacts](#)

- select group -
- Administrators
- All Contacts
- Applicants
- Master list
- RSVP list

Review process – step 2 (actually)

Add them to a “temporary” list

Add Contacts to A Group

Add Contact To Existing Group Create New Group

Select Group*

Number of selected contacts
[View Selected Contacts](#)

Add to Group Cancel

- select group -
- Administrators
- Advisory Board
- Applicants
- Master List
- Newsletter Subscribers
- Rejected
- Summer Program Volunteers
- temporary group

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d report

Review process – step 3

Search for “temporary” folks

Find Contacts

▼ Edit Search Criteria

Name or Email

is...

in

with

- Administrators
- Advisory Board
- Newsletter Subscribers
- Summer Program
- Volunteers
- temporary group**

✓ Search

Review process – step 4

Add *them* to the Accepted list

Add Contacts to A Group

Add Contact To Existing Group Create New Group

Select Group*

Number of selected contacts

- select group -
- Administrators
- Advisory Board
- Master List
- Newsletter Subscribers
- Rejected
- Summer Program Volunteers
- temporary group

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Review process – step 5

Send them a form email

Find Contacts

▸ Edit Search Criteria

4 Contacts

Group(s) In temporary group ...AND...
Group Status 'Added'

» Advanced Search
» Search Builder

Select Records: All 4 records 0 Selected records only

Actions

Add activity

Add relationship - to household

Add relationship - to organization

Communication preferences - alter

Delete contacts

Delete permanently

Email - schedule/send via CiviMail

Email - send now (to 50 or less)

Email - unhold addresses

N O P Q R S T U V W X Y Z All

City	State	Postal	Country	Email	Phone	Action
Northam	TX	76693	United States	bachman.hermin...	(811) 543-1243	View Edit more
				jayb10@sample...	(853) 666-7251	View Edit more
					(602) 843-5842	View Edit more
Stow	NH	03865	United States	lbachman@sampl...		View Edit more

Access Keys: ⌘

Review process – step 5 continued

Send them a form email

✓ Send Email ✕ Cancel

Email will NOT be sent to 3 contacts - (no email address on file, or communication preferences specify D

From * "admin@example.com" <admin@example.c... ⓘ

Recipient(s) ✕ "Bachman, Herminia" <bachman.herminia76@infomail.co.in> 🔍

Add CC Add BCC

Use Template - select -

Subject * - select -

▼ HTML Format ⓘ

- Sample CiviMail Newsletter Template
- Sample Responsive Design Newsletter - Single Column Template
- Sample Responsive Design Newsletter - Two Column Template

Source ✂ 📄 📧 📧 📧 ⏪ ⏩ ABC ✓

B *I* U ~~S~~ x₂ x² *T*_x ☰ ☷ ☶ ☵ ☹ ☰ ☷ ☶ ☵ ☹ 🔗 🔗 🚩 🖼️ 📊 ☰ ☷ ☶ ☵ ☹ Ω

Styles Format 🔄 ?

Review process – step 6

Register them for the event

Find Contacts

▸ Edit Search Criteria

4 Contacts Group(s) In temporary group ...AND...
Group Status 'Added'

Select Records: All 4 records 0 Selected records only

☑ Actions

mailing labels - print

Merge contacts

Print selected rows

Print/merge document

Register participants for event

Restore contacts from trash

Tag - add to contacts

Tag - remove from contacts

Update multiple contacts

N O P Q R S T U

City	State	Postal	Co
Northam	TX	76693	United
Stow	NH	03865	United

Review process – step 7

Remove them from the Applicant group

Find Contacts

▸ Edit Search Criteria

4 Contacts Group(s) In temporary group ...AND...
Group Status 'Added'





Select Records: All 4 records 0 Selected records only

⊙ Actions

remo

Group - remove contacts

Tag - remove from contacts

	Name	Address	City	State	P
<input type="checkbox"/>	 Bachman, Herminia	14H Main Pl SW	Wortham	TX	7669
<input type="checkbox"/>	 Bachman, Jay				
<input type="checkbox"/>	 Bachman, Junko				
<input type="checkbox"/>	 Bachman, Lou	581F Bay Dr NE	Plaistow	NH	0386

Review process – step 7 continued

Remove them from the Applicants group

Remove Contacts from Group

✓ Remove from Group

✕ Cancel

Select Group *

- select group -

Administrators

Advisory Board

Applicants

Master List

Newsletter Subscribers

Rejected

Summer Program Volunteers

temporary group

CiviCRM is openly available
and report bugs. [Online do](#)

Review process – step 8

Remove them from the temporary group

Find Contacts

▸ Edit Search Criteria

4 Contacts Group(s) In temporary group ...AND...
Group Status 'Added'

Select Records: All 4 records 0 Selected records only





⊙ Actions

remo

Group - remove contacts

Tag - remove from contacts

N O P Q R

	Name	Address	City	State	P
<input type="checkbox"/>	 Bachman, Herminia	14H Main Pl SW	Wortham	TX	7669
<input type="checkbox"/>	 Bachman, Jay				
<input type="checkbox"/>	 Bachman, Junko				
<input type="checkbox"/>	 Bachman, Lou	581F Bay Dr NE	Plaistow	NH	0386

Review process – step 8 continued

Remove them from the temporary group

Remove Contacts from Group

✓ Remove from Group ✕ Cancel

Select Group *

✓ Remove from Group

- select group -
- Administrators
- Advisory Board
- Applicants
- Master List
- Newsletter Subscribers
- Rejected
- Summer Program Volunteers
- temporary group

CiviCRM is open source. [Report a bug](#)

Bored yet? We still need to do
“Rejected” and “Needs More Info”!

What we really need: 3 simple buttons

Edit Search Criteria [?](#)

02 Contacts [» Search Builder](#)

Select Records: All 202 records 0 Selected records only

Actions

Next > Last >> Contact 1 - 50 of 202 Page of 5

[B](#) [C](#) [D](#) [E](#) [F](#) [G](#) [H](#) [I](#) [J](#) [K](#) [L](#) [M](#) [N](#) [O](#) [P](#) [Q](#) [R](#) [S](#) [T](#) [U](#) [V](#) [W](#) [X](#) [Y](#) [Z](#) [Ł](#) [All](#)

[Reset all selections](#)

Name	Email	Contact Source	Most Important Issue	Action
Adams-Olsen, Kandace		Sample Data		Accept Reject More Info View Edit more ▶
adaz11@airmail.biz	adaz11@airmail.biz	Sample Data		Accept Reject More Info View Edit more ▶
admin@example.com	admin@example.com			Accept Reject More Info View Edit more ▶
alexiaolsen@testmail.co.in	alexiaolsen@testmail.co.in	Sample Data		Accept Reject More Info View Edit more ▶
Bachman, Herminia	bachman.herminia76@infomail.co.in	Sample Data		Accept Reject More Info View Edit more ▶
Bachman, Jay	jayb10@sample.info	Sample Data		Accept Reject More Info View Edit more ▶
Bachman, Judy		Sample Data		Accept Reject More Info View Edit more ▶

[Add to the master list, RSVP for upcoming event, remove from welcome email.](#)

That's a lot of work.

I'm a Civi developer, so I could take 4-6 hours to do this. But it would only work with MY groups, MY emails, etc.

- What we need is a way for non-coders to make their own links to streamline THEIR workflows.
- Writing THAT extension is 60-70 hours of work.



I'm (f)unemployed!

I could go to the beach, adopt a pet, take up new hobbies.

Or....I could spend two weeks of my life writing my "love letter".

Guess which one I picked?

Introducing: Fast Action Links

Edit Search Criteria [?](#)

02 Contacts [» Search Builder](#)

Select Records: All 202 records 0 Selected records only

Actions

Next > Last >> Contact 1 - 50 of 202 Page of 5

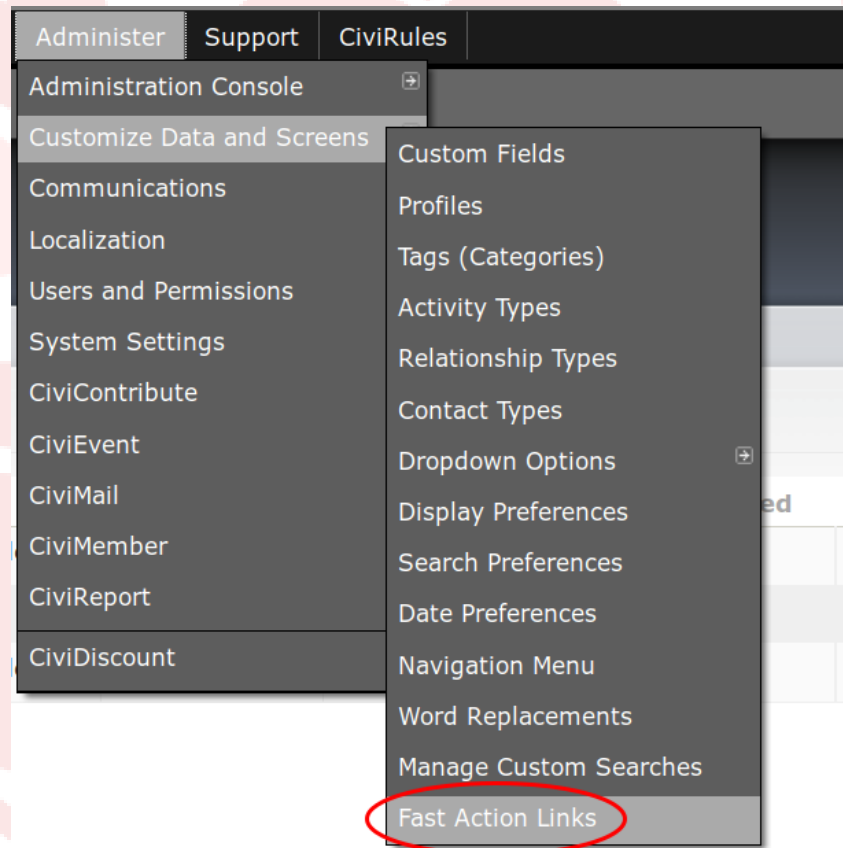
[B](#) [C](#) [D](#) [E](#) [F](#) [G](#) [H](#) [I](#) [J](#) [K](#) [L](#) [M](#) [N](#) [O](#) [P](#) [Q](#) [R](#) [S](#) [T](#) [U](#) [V](#) [W](#) [X](#) [Y](#) [Z](#) [Ł](#) [All](#)

Reset all selections

Name	Email	Contact Source	Most Important Issue	Action
Adams-Olsen, Kandace		Sample Data		Accept Reject More Info View Edit more ▶
adaz11@airmail.biz	adaz11@airmail.biz	Sample Data		Accept Reject More Info View Edit more ▶
admin@example.com	admin@example.com			Accept Reject More Info View Edit more ▶
alexiaolsen@testmail.co.in	alexiaolsen@testmail.co.in	Sample Data		Accept Reject More Info View Edit more ▶
Bachman, Herminia	bachman.herminia76@infomail.co.in	Sample Data		Accept Reject More Info View Edit more ▶
Bachman, Jay	jayb10@sample.info	Sample Data		Accept Reject More Info View Edit more ▶
Bachman, Judy		Sample Data		Accept Reject More Info View Edit more ▶

Add to the master list, RSVP for upcoming event, remove from welcome email.

Adds this menu item



Familiar Civi feeling

CRM Sandbox on Drupal

[My account](#)

[Log out](#)

[Home](#) > [CiviCRM](#)

Fast Action Links



Link Label	Search View	Action	Dim on Use	Confirm	Order	Enabled	
Accept	Application Review	Trigger a CiviRule	No	Yes	↓ ↓	Yes	Edit Disable Delete
Reject	Application Review	Add to Group	Yes	No	↕ ↑ ↓ ↓	Yes	Edit Disable Delete
More Info	Application Review	Trigger a CiviRule	Yes	No	↕ ↑	Yes	Edit Disable Delete





In-place editing!

[+ Add Fast Action Link](#)


[Access Keys?](#)


Don't clutter normal searches

Advanced Search 

▼ Search Criteria 


▼ Display Settings For Results

Display Results As 

Views For Display Contacts 

- default view -
- default view -
- Name and Address
- Supporter Profile
- Your Registration Info
- Application Review**

▼ Search Settings

Search Operator 
 AND OR

Search in Trash
(deleted contacts)

▼ Basic Criteria

Complete OR Partial Name

Complete OR Partial Email

Contact Type(s)

Creating/Editing a Fast Action Link

ch Contacts Contributions Events Mailings Memberships Reports Administer Support CiviRules

Edit Fast Action Link

Link Text *

Description ?

Search View * ?

Action ?

Select a CiviRule

Hover Text ?

Success Message ?

Dim on Use? ? **Lots of in-line documentation!**

Confirmation box? ? **Two-click option for scaredy-cats!**

Order *

Is this link active?

Submit Cancel

Show on Search View

To use this link, go to [Advanced Search](#) and select this profile from "Views for Display Contacts".

If this field displays "None Found", please go to the [Profiles](#) page, select "Settings" next to a profile, click the "Search Views" checkbox and press "Save".

Disable Delete

Disable Delete

Disable Delete

Access Keys: ?

jon@zabuntu (192.168.1.168) - byobu

One click per applicant – not 30

202 Contacts
Select Records: All 202 records 0 Selected records only

Success/Error Notifications
✔ "Needs More Email" info sent.

Next > Last >> Contact 1 - 50 of 202 Page 1 of 5

A B C D E F G H I J K L M N O P Q R S T U V W X Y Z All

Reset all selections

<input type="checkbox"/>	Name	Email	Contact Source	Most Important Issue	Action
<input type="checkbox"/>	Adams-Olsen, Kandace		Sample Data		Accept Reject More Info View Edit more ▶
<input type="checkbox"/>	adaz11@airmail.biz	adaz11@airmail.biz	Sample Data		Accept Reject More Info View Edit more ▶
<input type="checkbox"/>	admin@example.com	admin@example.com			Accept Reject More Info View Edit more ▶
<input type="checkbox"/>	alexiaolsen@testmail.co.in	alexiaolsen@testmail.co.in	Sample Data		Accept Reject More Info View Edit more ▶
<input type="checkbox"/>	Bachman, Herminia	bachman.herminia76@infomail.co.in	Sample Data		Accept Reject More Info View Edit more ▶
<input type="checkbox"/>	Bachman, Jay	jayb10@sample.info	Sample Data		Accept Reject More Info View Edit more ▶
<input type="checkbox"/>	Bachman, Junko		Sample Data		Accept Reject More Info View Edit more ▶
<input type="checkbox"/>	Bachman, Lou	lbachman@sample.co.in	Sample Data		Accept Reject More Info View Edit more ▶
<input type="checkbox"/>	Bachman, Valene		Sample Data		Accept Reject More Info View Edit more ▶

Remove from Applicants; send rejection email; add to Rej

Hover Text for inline help

Dim on use

jon@zabuntu (192.168.1.168) - byobu

For developers

- Links are a full-fledged entity with a full API.
- You can create custom actions – but better still, create them as CiviRule actions so both extensions benefit!

What's next?

- Add Fast Action Links to emails!
 - Create a Facebook-like event email, where a user can click a button IN THEIR EMAIL to RSVP for an event, answer your one-question survey, etc.

Share the love!

- Have a use for this extension? Talk to me about it!
- Thanks for listening!