

# CiviCRM

A free open source Customer Relationship Management (CRM) software designed primarily for use by non-profit organisations to assist in maintaining relationships between their supporters and constituents.

CiviCRM's open source design and comprehensive documentation make it highly customizable for any marketing operations, including NPOs. It can be tailored to meet the specific requirements of any NPOs, allowing them to easily manage their marketing campaigns and track their success. It offers a suite of tools to manage contacts, donations, memberships, events, email marketing, and other activities. Specific needs of NPOs can include tracking donor activity, engaging with volunteers, and managing fundraising campaigns.

CiviCRM is a great tool for NPOs to use in their operations. It's a useful tool for case/event management, contacts, members, and fundraising campaigns. They can also use the bulk-mailing functionality to reach potential donors with direct mail campaigns. Additionally, CiviCRM's integrations with payment gateways make it easy to process donations and other payments for events and memberships.

Over 11,000 NPOs around the world use CiviCRM to build and manage their donor, member, and constituent bases. CiviCRM can be used to store contact data, send personalised messages, plan events, manage membership programs, organise advocacy campaigns, and more.

## Features of the tool

- Contact Management
- Configurable & Customisable
- Membership Management
- Accounting Integration
- Case Management
- Event Management
- Email Marketing
- Contribution Management
- Advocacy Campaigns
- Peer- to - Peer Fundraising
- Reports
- Compatible with Drupal, Wordpress, and Joomla

## Benefits for Nonprofits

- It provides an efficient way to store and manage contact information for their constituents, volunteers, donors, and other stakeholders. This makes it easier to track relationships and remain organised

- It can be tailored to meet the specific requirements of NPOs, making it highly customizable and configurable.
- CiviCRM enables better engagement with members and track participation by making membership management easier and more efficient. This helps to ensure that their efforts are reaching the right people.
- It facilitates accounting integration, streamlining the financial processes by enabling them to more efficiently track and manage financial information.
- Provides an organised system for managing cases, allowing NPOs to ensure that their cases are handled promptly and effectively, thus enabling them to better serve their constituents.
- Easily manage and track attendance for events, making them run efficiently and successfully.
- It enables NPOs to deliver tailored email campaigns to their constituents, making sure that the correct message is delivered to the right people.
- It facilitates to efficiently track, manage, and process donations, thus ensuring the success of fundraising efforts.
- It provides the tools necessary to efficiently set up and track the progress of advocacy campaigns, making it easier to effectively promote causes and raise awareness.
- It is an efficient way to facilitate peer-to-peer fundraising campaigns and monitor the success, enabling NPOs to involve their supporters and amplify their fundraising efforts.
- It offers a range of reports to assist in monitoring progress and evaluating outcomes. This enables organisations to stay on track and assess their progress towards their objectives.
- CiviCRM is designed to be easily integrated with a range of content management systems, such as Drupal, Wordpress, and Joomla, thus allowing NPOs to take advantage of improved online presence and increased reach.

## Integrations

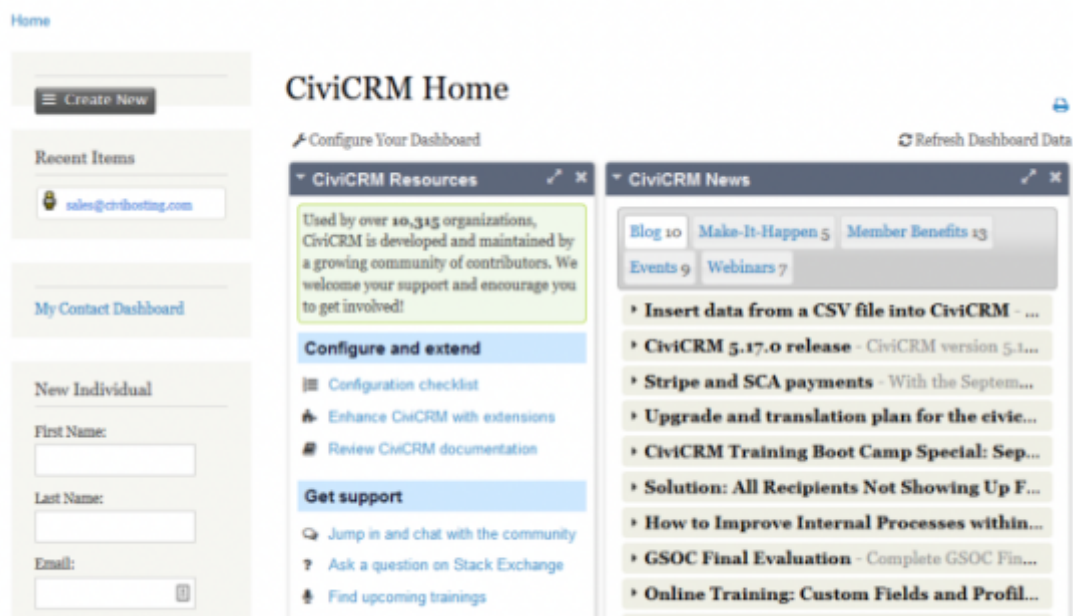
- CSM: Wordpress, Joomla Drupal.
- Payment systems: Strip, Paypal, iATS, TSYS.
- Bulk emails: CiviSMTP, Mailchimp.

## Why Nonprofits can use ERPNext

- Its an open source tool
- CiviCRM simplifies donation tracking, event management, and contact management
- It saves time and money in fundraising processes.
- It integrates with major content management systems.
- Supports localization for global reach, it tracks and measures NPOs fundraising efforts around the world.

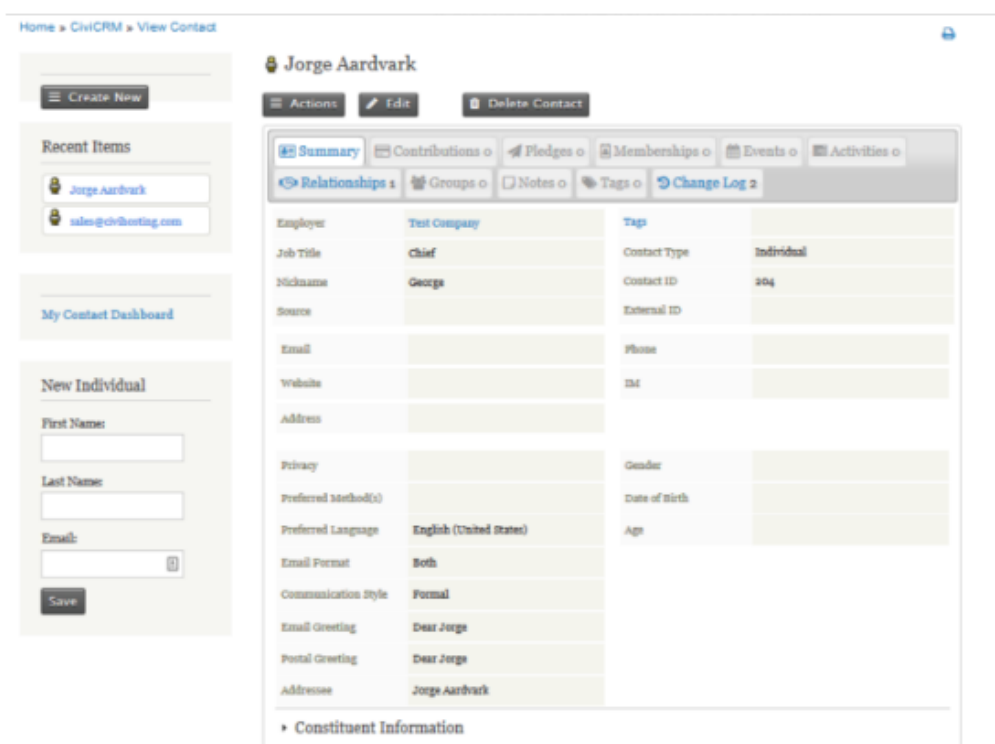
## Graphical Representation:

Fig. 1. CiviCRM Dashboard Configuration Interface



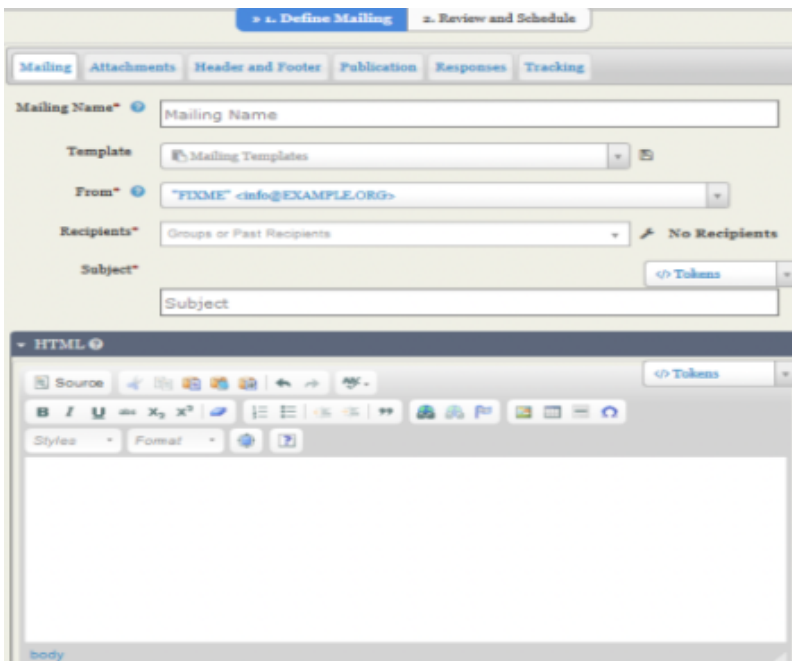
CiviCRM provides a customizable dashboard for NPOs and provides the ability to create quick links and include content about donors or customers on the main page.

Fig. 2. CiviCRM Donor Management interface



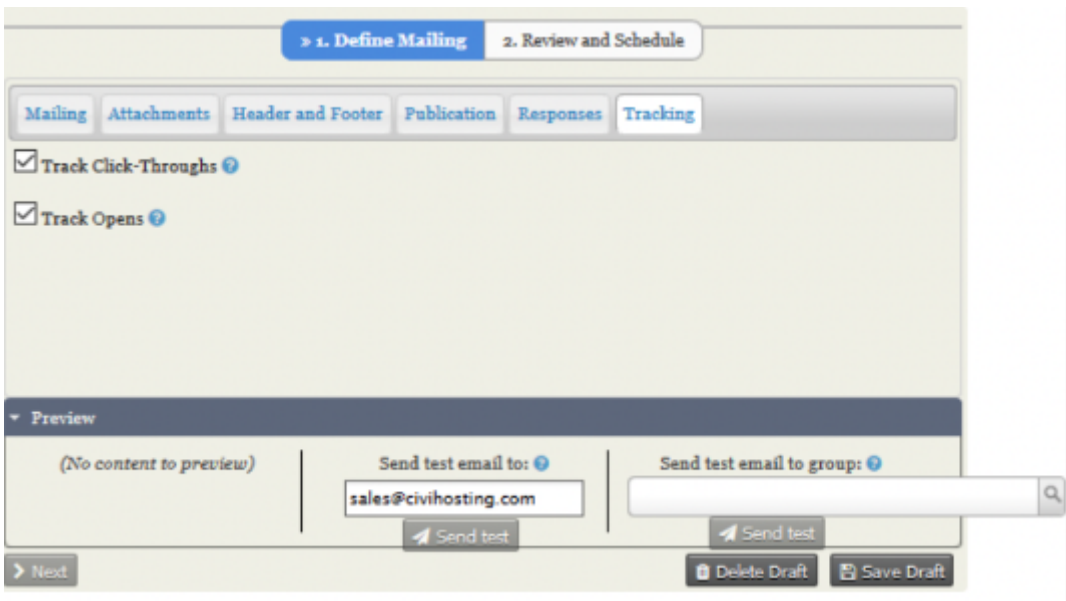
Maintaining a large list of donors in a central database with CiviCRM can help to build strong relationships, save costs on duplicate mailings, and facilitate direct interactions. This can help to foster trust and loyalty between the NPOs and its supporters.

Fig. 3. Email Marketing interface



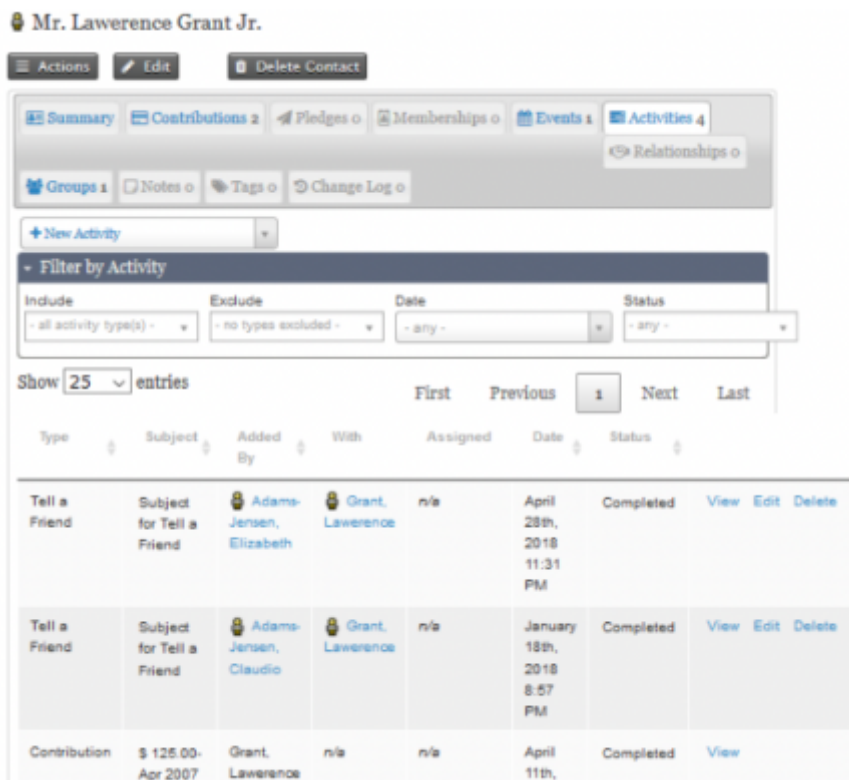
CiviCRM's bulk mail capabilities make it a powerful tool to reach target audiences. With the ability to construct emails in HTML and text, create personalised templates, and segment lists into specific interest groups, NPOs can craft effective fundraising campaigns, event invitations, and other messages to reach their supporters.

Fig. 4. Email tracking interface



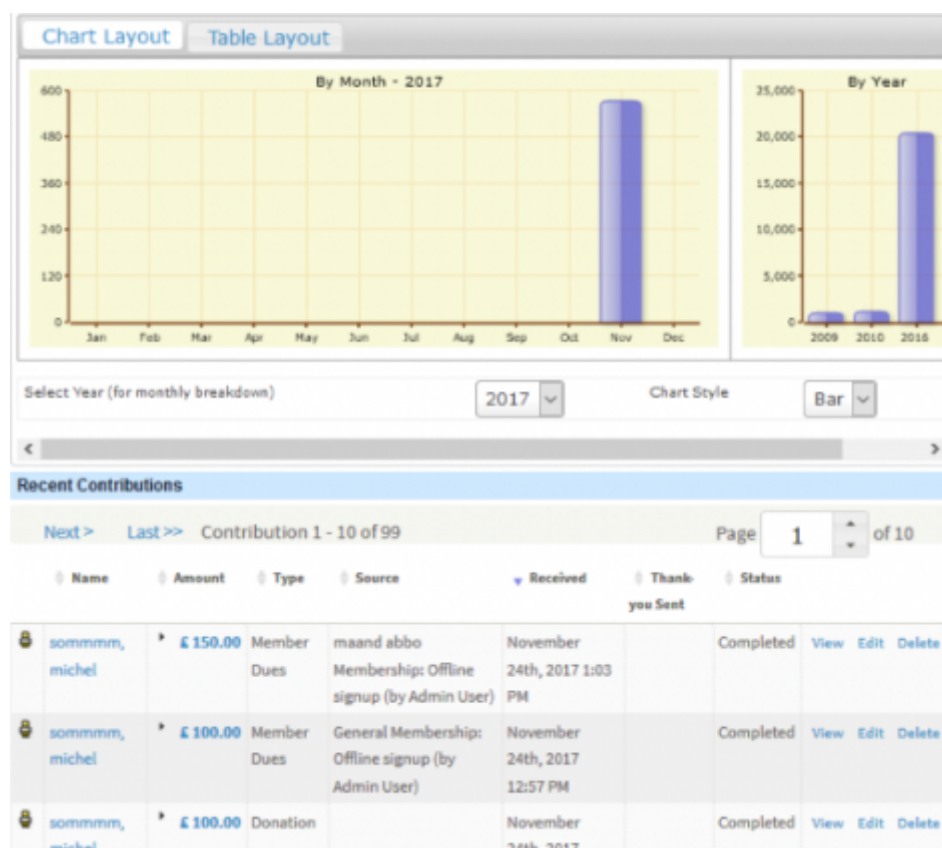
NPOs can use email tracking to identify which emails are opened as well as the click through rates for links contained within their messages. This can help them measure their success in reaching their target audience and building relationships with supporters. Additionally, they can monitor their bounce rates and unsubscribe events to ensure their emails are reaching the right people.

Fig. 5. Activity tracking interface



Tracked activity in a grid to see how individuals have responded to their mailings, events and other activities. This can help them better understand engagement with their target audience and better tailor their outreach efforts to ensure they are reaching the right people.

Fig. 6. CiviCRM Reporting interface



CiviCRM also includes over 40 built-in reports that are easily modifiable, which can be used to track donations, memberships, and more. Files can be printed in PDF or HTML formats and exported as CSV. Reports can also be integrated back into the application to create new groups or segments, which can then be used for targeted mailings or other activities by NPOs. Data can be displayed in table or graph formats, such as pie or bar charts.

## Limitations

- User interface needs improvement.
- Public Relation and marketing needs to follow up
- Technical help is needed in the long run

## Conclusion

CiviCRM is a free and open-source customer relationship management software designed for non-profit organisations and civic sector entities. It offers tools for managing contacts, fundraising, events, memberships, and more. With a user-friendly interface and robust feature set, CiviCRM is a popular choice for organisations looking to streamline their operations and improve their engagement with supporters.

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