

客戶關係管理系統(服務業)

D02A2

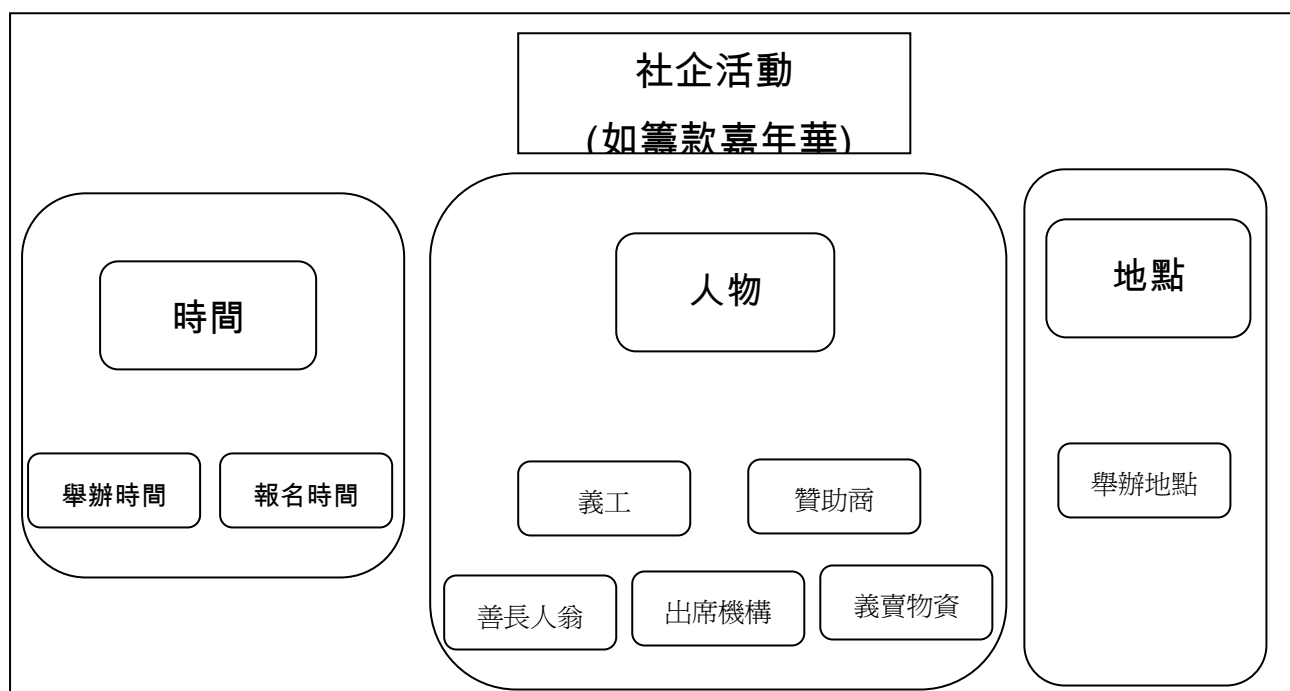
課堂二

2009/11/24 (星期二) 6:00PM – 9:00PM

1. 活動籌辦及管理

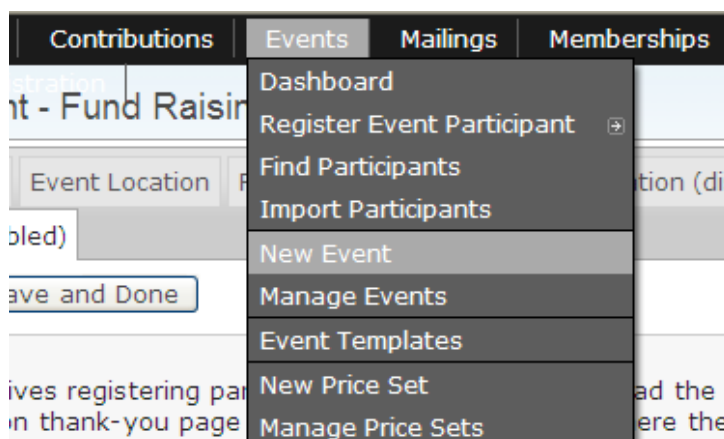
社會企業經常參與或舉辦大大小小的嘉年華會、義賣、慈善籌款等活動，由於人數及參與機構眾多，社企有必要清楚各個參與客戶、機構的關係，以便作出適當的溝通，聯絡他們並提供有關活動、售賣商品或其他飲食服務的資料。

假設您現在統籌一個慈善籌款的嘉年華會，而舉辦日期、地點、贊助商、程序安排的概況及銷售的商品已作下決定，但還欠缺尋找義工的參與，尋找熱心人仕或機構的出席及捐助，以及向各界作出有效的宣傳。



1.1) 新增活動

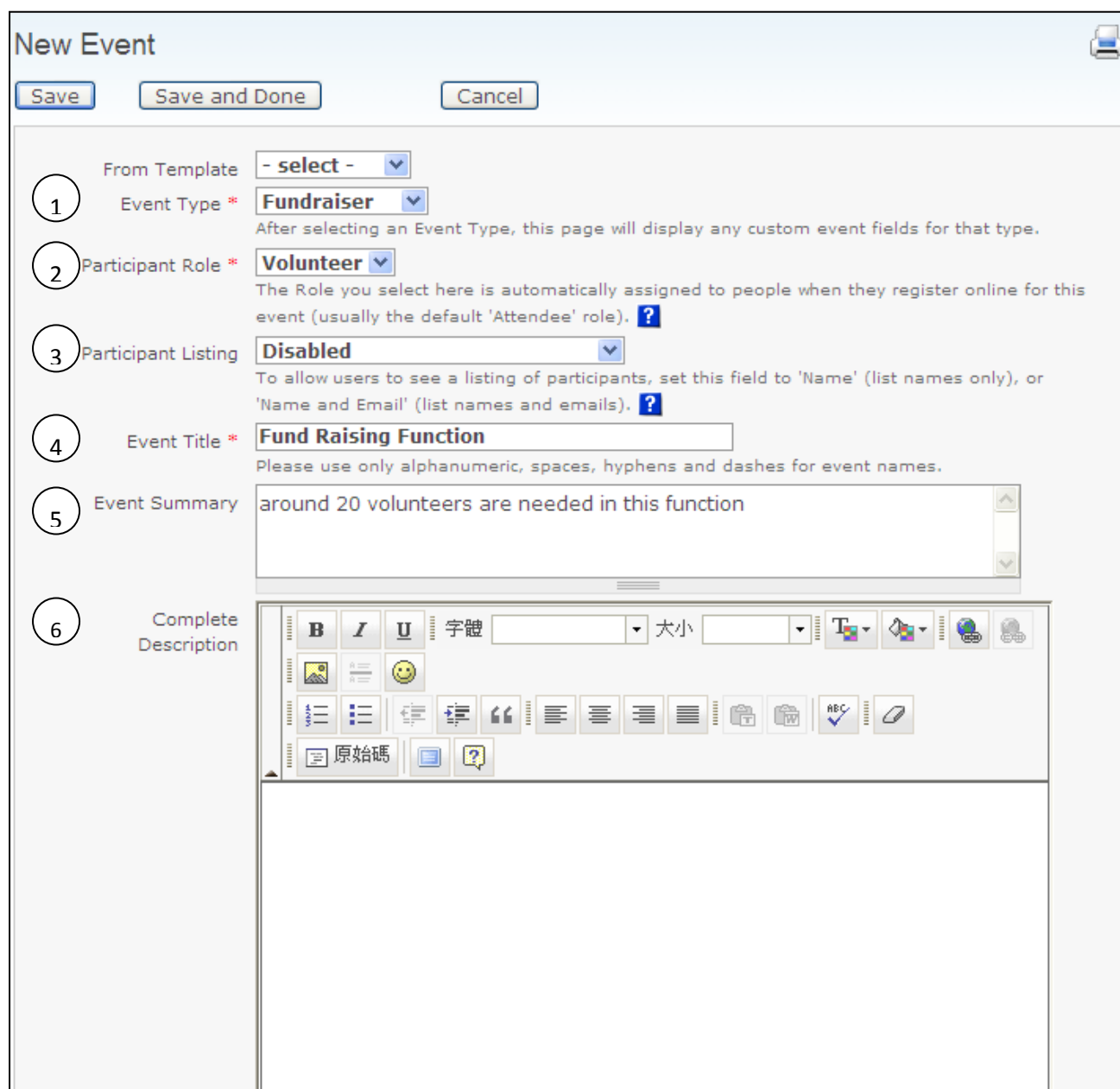
您可以先於系統中設立一個活動 (Event)，以便進行一連串的聯絡、網上報名及統籌更進管理等工作。請在菜單中選下 **Events** → **New Event** 來新增活動記錄。



圖一

進入 New Event (新增活動)圖二及圖三的畫面，在此您可以建立活動的基本資料。

- ① Event Type：活動的類型
- ② Participant Role：參與者的身份
- ③ Participant Listing：參與者清單的瀏覽權限，包括 Disabled (停用清單)、Name Only、Name and Email
- ④ Event Title：活動的標題
- ⑤ Event Summary：活動概況
- ⑥ Complete Description：活動詳述



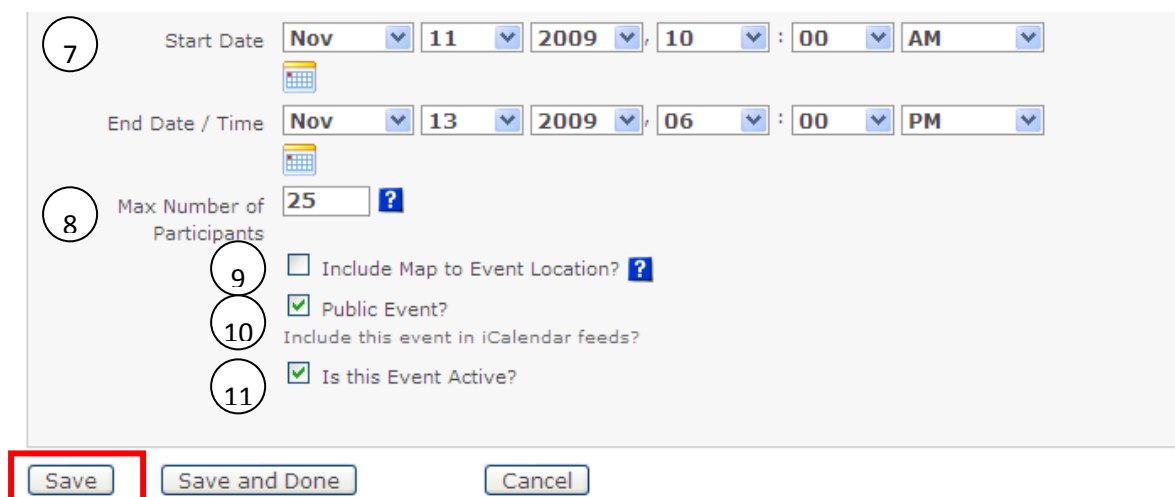
The screenshot shows the 'New Event' form with the following fields and callouts:

- 1** From Template: - select -
- 1** Event Type *: Fundraiser
- 2** Participant Role *: Volunteer
- 3** Participant Listing: Disabled
- 4** Event Title *: Fund Raising Function
- 5** Event Summary: around 20 volunteers are needed in this function
- 6** Complete Description: (Rich text editor area)

圖二

- 7 Start Date , End Date/ Time : 活動的開始及結束日期
- 8 Max Number of Participants : 參與人數上限
- 9 Include Map to Event Location : 是否插入活動地址地圖
- 10 Public Event?: 是否公開活動，供系統以外的人得知 (要剔下選項才可配合線上報名功能)
- 11 Is this Event Active?: 活動是否生效

然後便可按下 Save 來完成並儲存這個記錄。



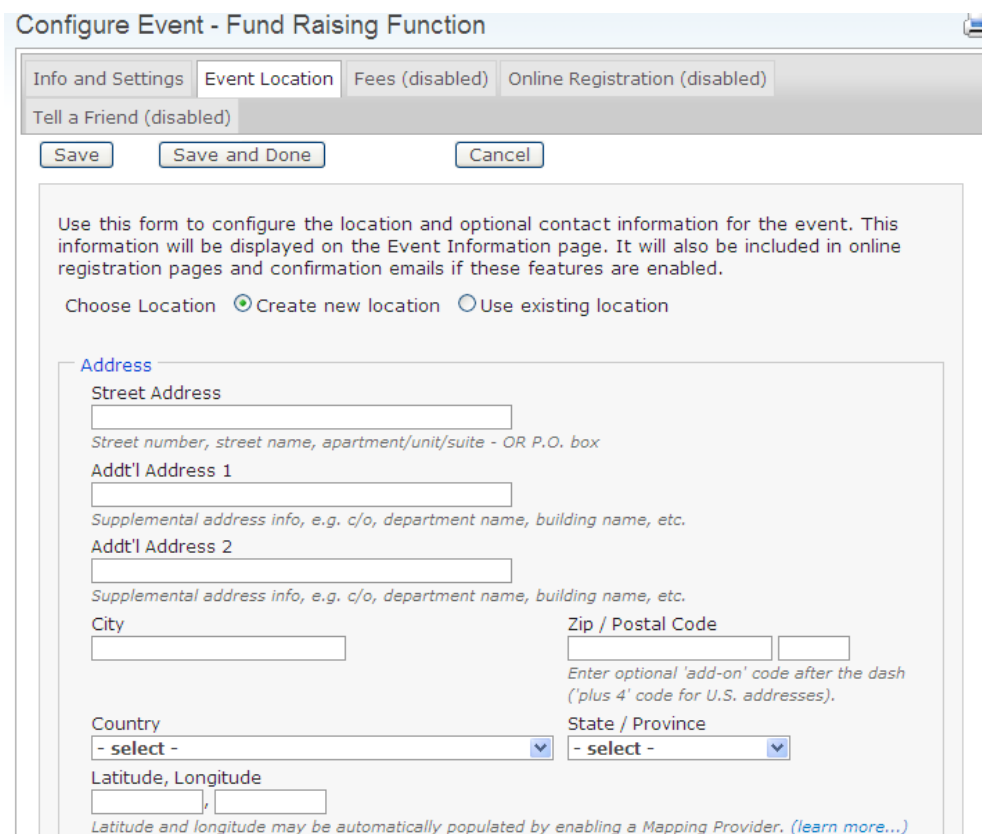
The screenshot shows a form with the following fields and options:

- 7** Start Date: Nov 11, 2009, 10:00 AM
- End Date / Time: Nov 13, 2009, 06:00 PM
- 8** Max Number of Participants: 25
- 9** Include Map to Event Location?:
- 10** Public Event?:
- Include this event in iCalendar feeds?:
- 11** Is this Event Active?:

Buttons at the bottom: Save (highlighted with a red box), Save and Done, Cancel.

圖三

按下儲存後會跳去 Configure Event (活動設定)的畫面，在此您可加入活動的舉辦地方、收費、網上報名及通知推廣。以下是修改活動地址的頁面。



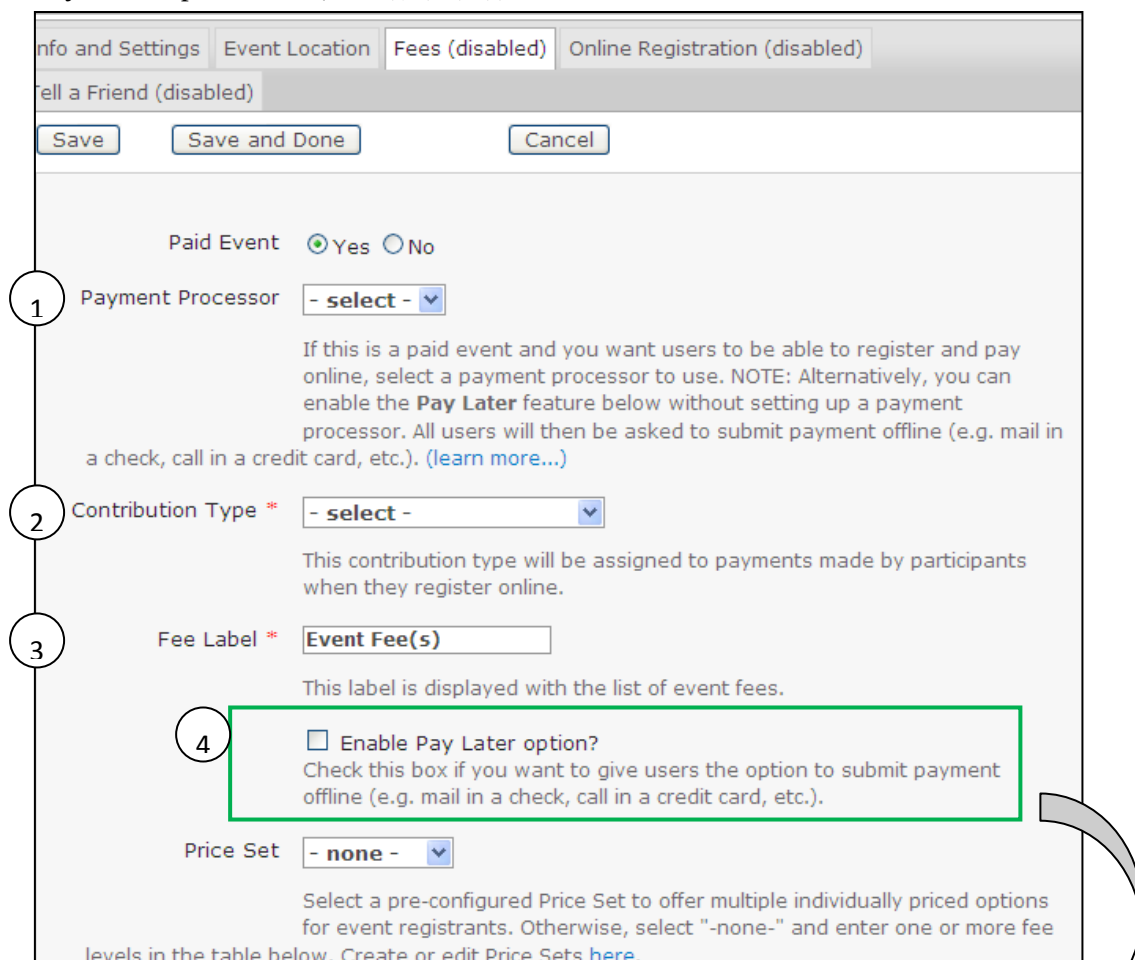
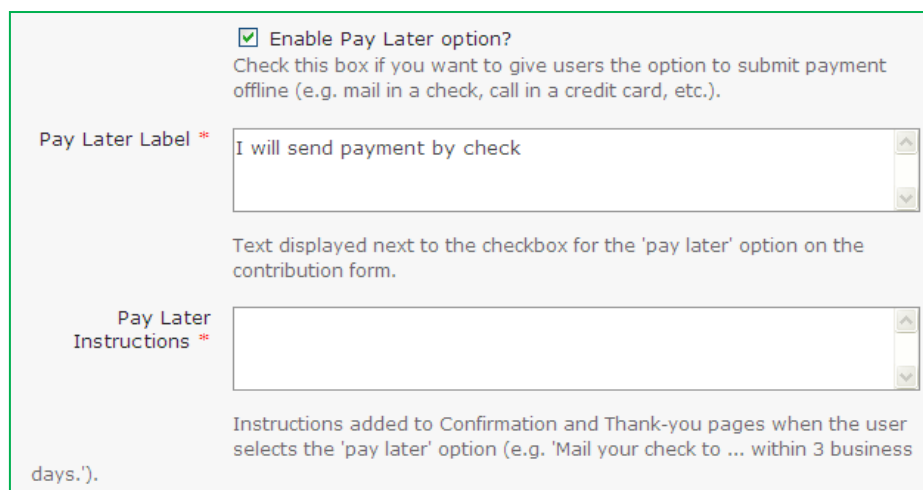
The screenshot shows the 'Configure Event - Fund Raising Function' page with the 'Event Location' tab selected. The page includes the following elements:

- Navigation tabs: Info and Settings, Event Location (selected), Fees (disabled), Online Registration (disabled), Tell a Friend (disabled).
- Buttons: Save, Save and Done, Cancel.
- Instructions: "Use this form to configure the location and optional contact information for the event. This information will be displayed on the Event Information page. It will also be included in online registration pages and confirmation emails if these features are enabled."
- Location Selection: Choose Location, Create new location, Use existing location.
- Address Fields:
 - Street Address: [text input]
 - Street number, street name, apartment/unit/suite - OR P.O. box
 - Add'l Address 1: [text input]
 - Supplemental address info, e.g. c/o, department name, building name, etc.
 - Add'l Address 2: [text input]
 - Supplemental address info, e.g. c/o, department name, building name, etc.
 - City: [text input]
 - Zip / Postal Code: [text input]
 - Enter optional 'add-on' code after the dash ('plus 4' code for U.S. addresses).
 - Country:
 - State / Province:
 - Latitude, Longitude: [text input], [text input]
 - Latitude and longitude may be automatically populated by enabling a Mapping Provider. (learn more...)

圖四

如果參加活動是需要收取費用，也可以在系統中加入此功能來進行線上收費

- ① Payment Processor：付款的處理器，需要 PayPal 的帳號及支援，能提供線上收費功能，如不想使用線上收費，也可以選下④的 Enable Pay Later Option?
- ② Contribution Type：款項的類型
- ③ Fee Label：收費的標籤，來提示對方活動是需要收費的
- ④ Enable Pay Later Option?：不限制報名者線上繳款

圖五

以下是收費價目表，可設定徵收多少費用。您也可以為報名人仕設立折扣優惠，但在此不作詳細解析。

Regular Fees

Use the table below to enter descriptive labels and amounts for up to ten event fee levels. These will be presented as a list of radio button options. Both the label and dollar amount will be displayed. You can also configure one or more sets of discounted fees by checking "Discounts by Signup Date" below.

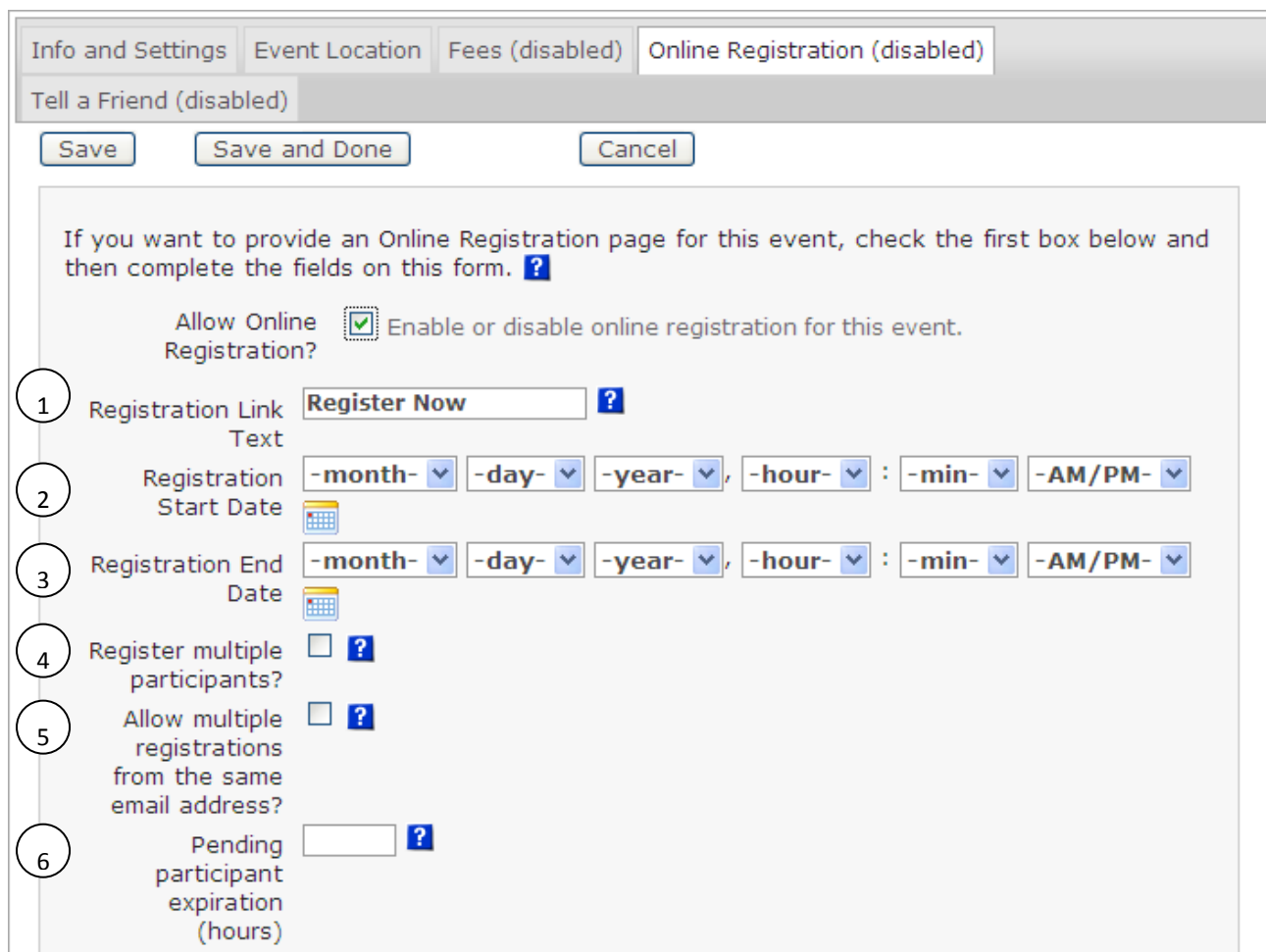
Fee Label	Amount	Default?
<input type="text"/>	HK\$ <input type="text"/>	<input checked="" type="radio"/>
<input type="text"/>	HK\$ <input type="text"/>	<input type="radio"/>
<input type="text"/>	HK\$ <input type="text"/>	<input type="radio"/>
<input type="text"/>	HK\$ <input type="text"/>	<input type="radio"/>
<input type="text"/>	HK\$ <input type="text"/>	<input type="radio"/>
<input type="text"/>	HK\$ <input type="text"/>	<input type="radio"/>
<input type="text"/>	HK\$ <input type="text"/>	<input type="radio"/>
<input type="text"/>	HK\$ <input type="text"/>	<input type="radio"/>
<input type="text"/>	HK\$ <input type="text"/>	<input type="radio"/>
<input type="text"/>	HK\$ <input type="text"/>	<input type="radio"/>

Discounts by Signup Date?
Check this box if you want to offer discounted fees based on registration date (e.g. 'early-registration discounts').

圖六

線上報名服務能使參與者快捷地登記他們欲出席的活動，如要在啓動 Online Registration，剔下 Allow Online Registration?

- ① Registration Link Text：在此輸入的文字，將會是一個超連結到報名頁面，用來提示報名者
- ② Registration Start Date：報名開始的時間
- ③ Registration End Date：報名完結的時間
- ④ Register Multiple Participants?：可否一人報下一個以上的名額
- ⑤ Allow Multiple Registrations from the same email address?：可否以同一個電郵地址多次報名 (此系統主要是以電郵地址來辨別報名人仕)
- ⑥ Pending participant expiration (hours)：
- ⑦ Registration Screen：報名頁所顯示的畫面
- ⑧ Confirmation Screen：報名確認頁所顯示的畫面
- ⑨ Thank-you Screen：報名成功後的答謝畫面
- ⑩ Confirmation E-mail：是否發送報名成功的確認郵件



The screenshot shows a web interface for configuring online registration. At the top, there are tabs for 'Info and Settings', 'Event Location', 'Fees (disabled)', and 'Online Registration (disabled)'. Below the tabs are buttons for 'Save', 'Save and Done', and 'Cancel'. The main content area contains the following fields:

- A checkbox labeled 'Allow Online Registration?' which is checked. A note says 'Enable or disable online registration for this event.' with a question mark icon.
- Field 1: 'Registration Link Text' with a text input containing 'Register Now' and a question mark icon.
- Field 2: 'Registration Start Date' with a date and time picker (month, day, year, hour, min, AM/PM).
- Field 3: 'Registration End Date' with a date and time picker (month, day, year, hour, min, AM/PM).
- Field 4: 'Register multiple participants?' with an unchecked checkbox and a question mark icon.
- Field 5: 'Allow multiple registrations from the same email address?' with an unchecked checkbox and a question mark icon.
- Field 6: 'Pending participant expiration (hours)' with a text input field and a question mark icon.

圖七

7 **Registration Screen**

Introductory Text
Introductory message / instructions for online event registration page (may include HTML formatting tags).

Footer Text
Optional footer text for registration screen.

Include Profile (top of page) - select -
Include additional fields on this registration form by configuring and selecting a CiviCRM Profile to be included at the top of the page (immediately after the introductory message). ?

Include Profile (bottom of page) - select -
Include additional fields on this registration form by configuring and selecting a CiviCRM Profile to be included at the bottom of the page.

8 **Confirmation Screen**

Title * **Confirm Your Registration Information**
Page title for screen where user reviews and confirms their registration information.

Introductory Text
Optional instructions / message for Confirmation screen.

Footer Text

9 **Thank-you Screen**

Title * **Thank You for Registering**
Page title for registration Thank-you screen.

Introductory Text
Optional message for Thank-you screen (may include HTML formatting).

Footer Text
Optional footer text for Thank-you screen (often used to include links to other pages/activities on your site).

10 **Confirmation Email**

Send Confirmation Email? Yes No
Do you want a registration confirmation email sent automatically to the user? This email includes event date(s), location and contact information. For paid events, this email is also a receipt for their payment.

Save **Save and Done** **Cancel**

圖八

您也可以透過報名者來推廣貴公司的活動，系統中設有 Tell a Friend (告知好友) 功能，在他們報名的同時，可以發送活動消息出去。

Info and Settings | Event Location | Fees (disabled) | Online Registration (disabled)

Tell a Friend (disabled)

Save
Save and Done
Cancel

Tell a Friend gives registering participants an easy way to spread the word about this event. The registration thank-you page will include a link to a form where they can enter their friends' email addresses, along with a personalized message. CiviCRM will record these solicitation activities, and will add the friends to your database.

Tell a Friend enabled?

Title *

Introduction

Suggested Message

Info Page Link

Thank-you Title *

Thank-you Message


Save
Save and Done
Cancel

圖九

完成了以上的設定程序後，才按下 **Save and Done**，然後會出現圖十的畫面。

即使在未完成設定前，不小心按下了 **Save and Done**，也可在後期 **Configure Event**(圖十)再逐一修改。

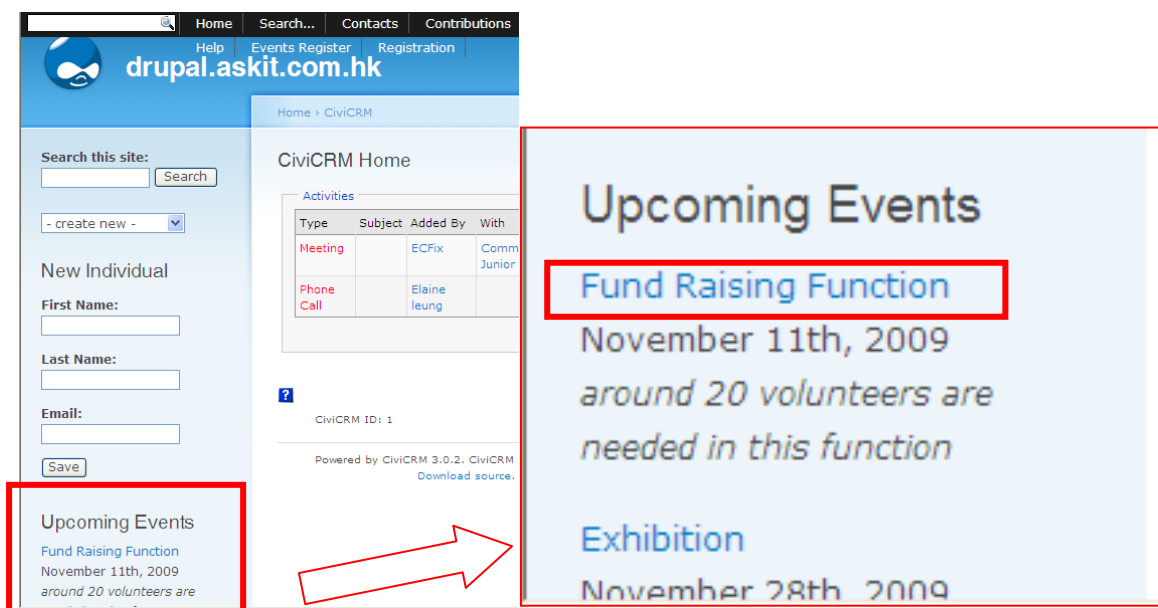
如圖十所見，活動的資料是可以隨時修改的。

Configure Event - Fund Raising Function 	
You can update the features and content for this event from here. Refer to the CiviEvent Administration Documentation for more information.	
Participants: Registered/Attended/Pending from pay later/Pending from incomplete transaction, No-show/Cancelled/Expired	
» Event Information and Settings	Set event title, type (conference, performance etc.), description, start and end dates, maximum number of participants, and activate the event. Enable the public participant listing feature.
» Event Location	Set event location and event contact information (email and phone).
» Event Fees	Determine if the event is free or paid. For paid events, set the payment processor, fee level(s) and discounts. Give online registrants the option to 'pay later' (e.g. mail in a check, call in a credit card, etc.).
» Online Registration	Determine whether an online registration page is available. If so, configure registration, confirmation and thank you page elements and confirmation email details.
» Tell a Friend	Make it easy for participants to spread the word about this event to friends and colleagues.
» Public Participant Listing	Participant Listing is not enabled for this event. You can enable it from Event Information and Settings .
» View Event Info	View the Event Information page as it will be displayed to site visitors.
» Test-drive Registration	Test-drive the entire online registration process - including custom fields, confirmation, thank-you page, and receipting. Fee payment transactions will be directed to your payment processor's test server. No live financial transactions will be submitted. However, a contact record will be

圖十

1.2) 線上活動報名

當新增了一個可線上報名的活動後，會發現左欄的 Upcoming Events 會出現了剛輸入的活動記錄，請先登出，並按下 Fund Raising Function，這樣便會以一個外來人的身份報名。



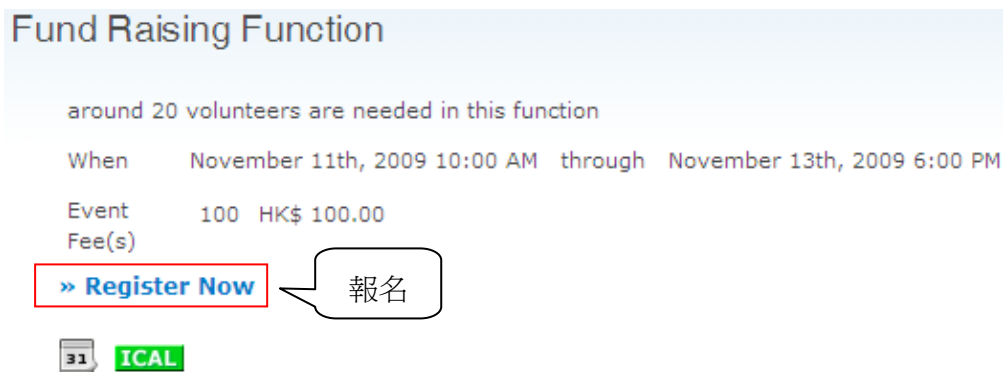
The screenshot shows the website interface with the following elements:

- Navigation menu: Home, Search..., Contacts, Contributions
- Sub-navigation: Help, Events Register, Registration
- Search bar: Search this site: [input] Search
- Form: New Individual (First Name, Last Name, Email, Save)
- Activities table:

Type	Subject	Added By	With
Meeting		ECFix	Comm Junior
Phone Call		Elaine leung	
- Upcoming Events section:
 - Fund Raising Function** (highlighted with a red box)
 - November 11th, 2009
 - around 20 volunteers are needed in this function
 - Exhibition
 - November 28th, 2009

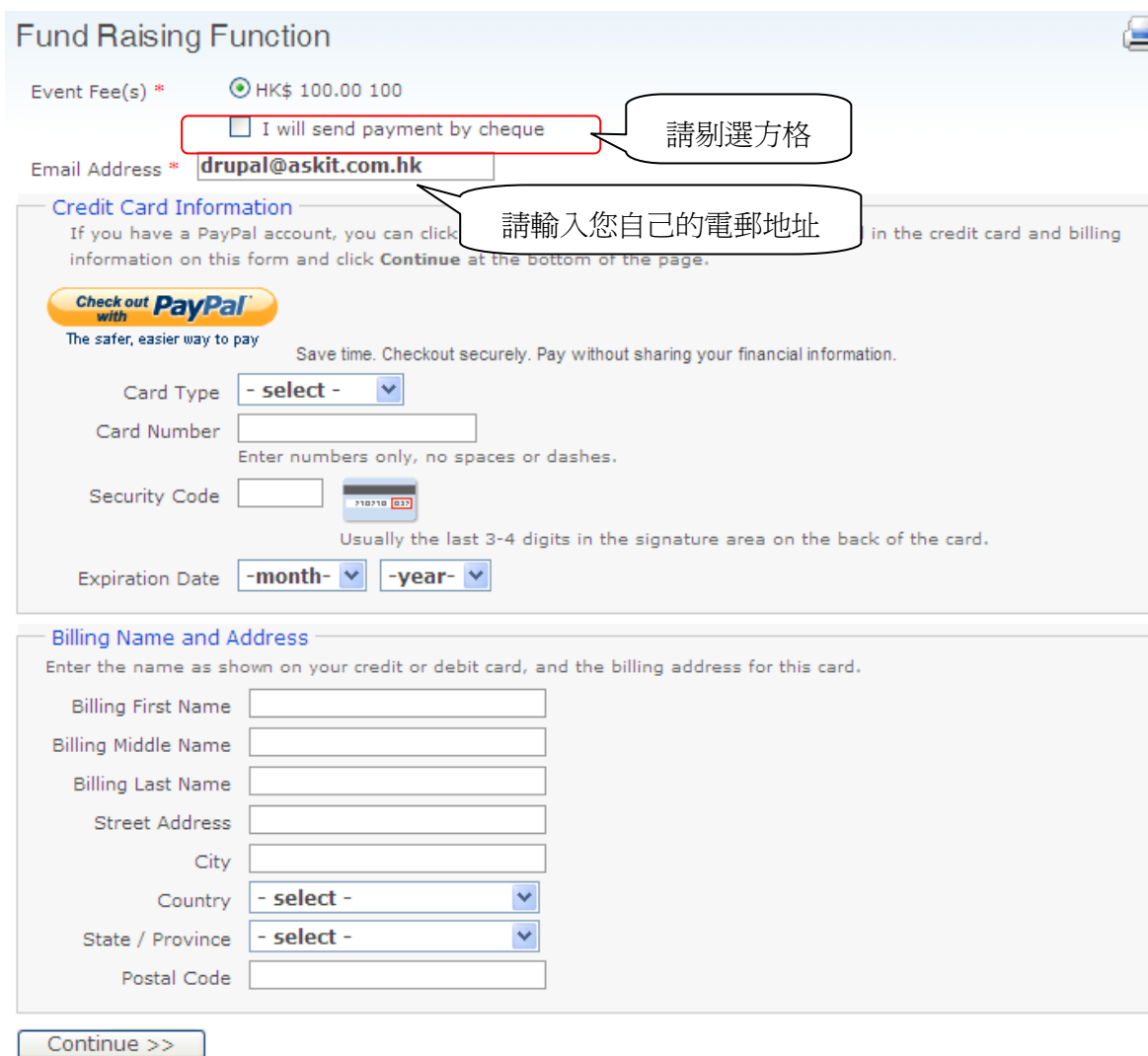
圖十一

進入報名頁面後，會顯示活動日期、地址、收費等等的資訊，按下 Register Now 可進行報名。



圖十二

要選擇付款方式及登記電郵地址來完成報名，您不一定要要求報名人仕線上付款，他們可以按下 I will send payment by cheque，以便稍候繳款。



圖十三

然後確認您的報名登記，按下 **Continue**。

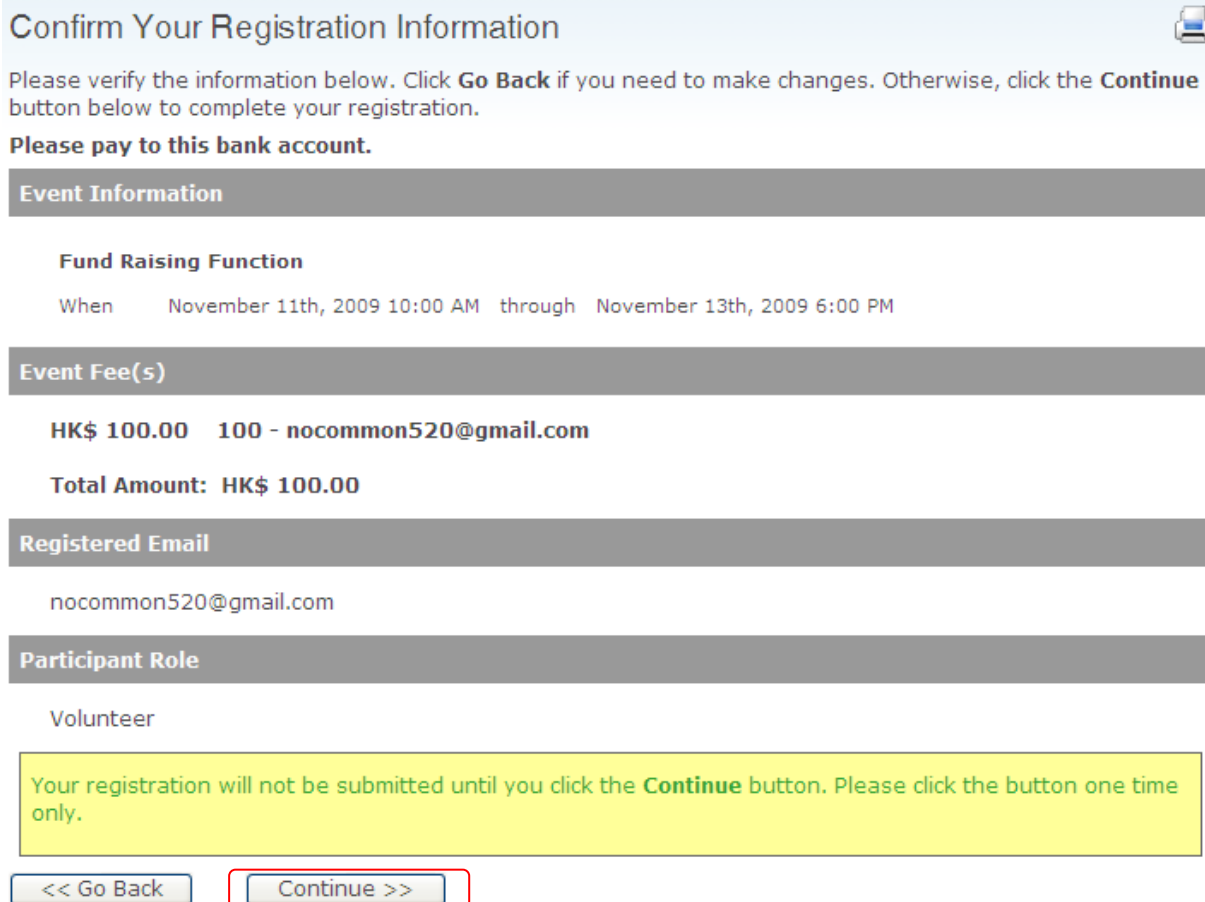


圖 十四

這便完成整個線上報名程序，如在活動設定中，曾剔選發送確認報名登記電郵，系統便會把報名記錄電郵至登記的地址

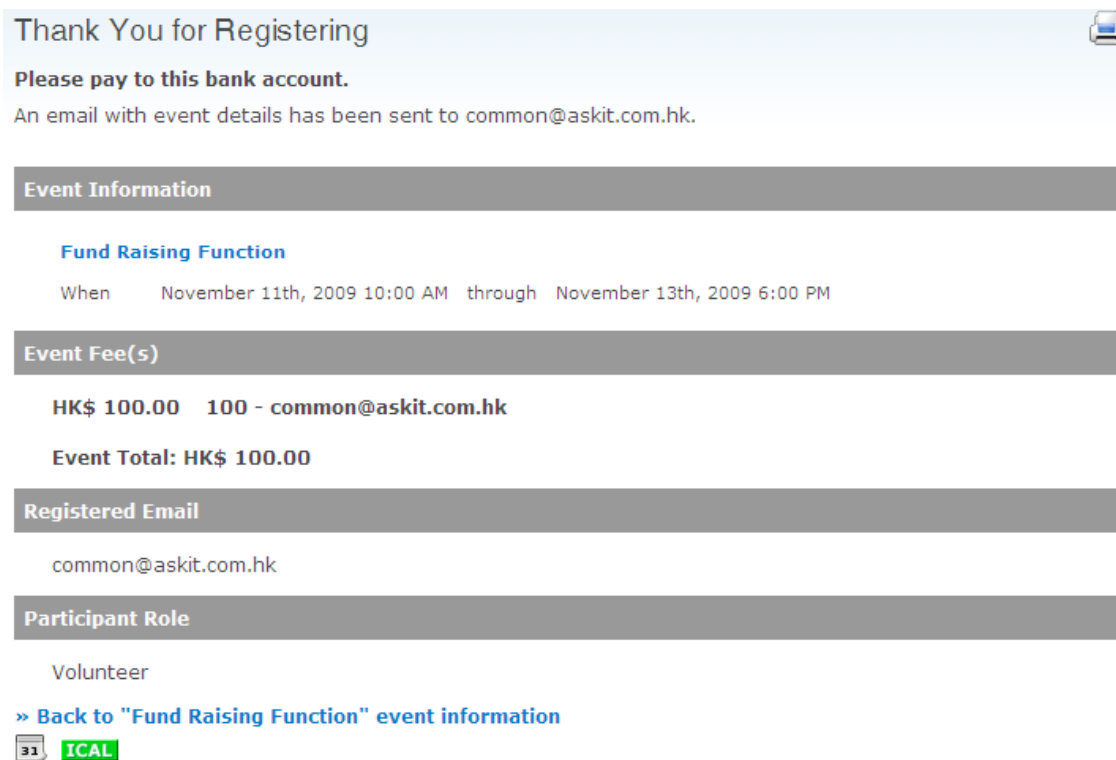
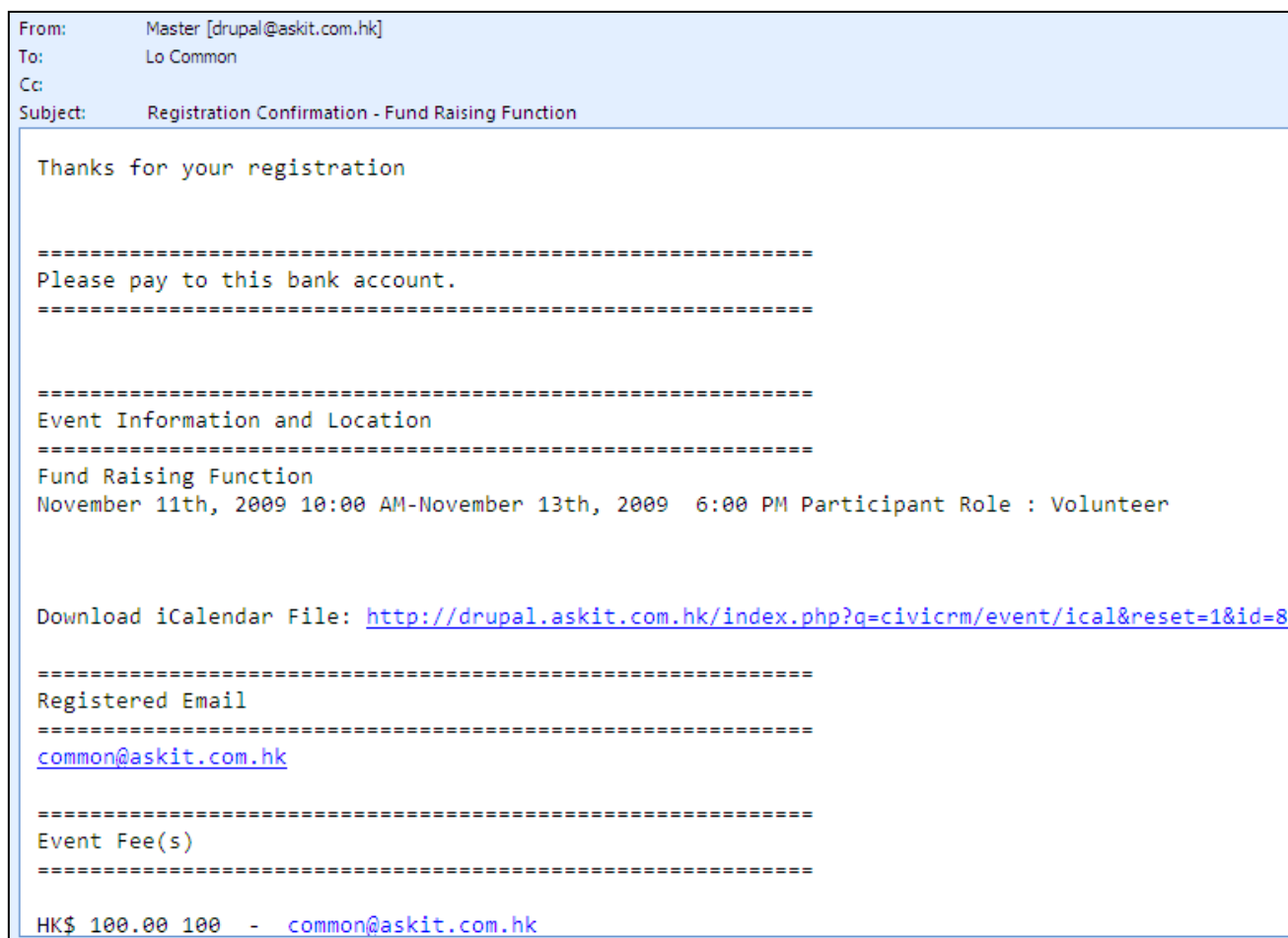


圖 十五

這便是自動發送の確認電郵。



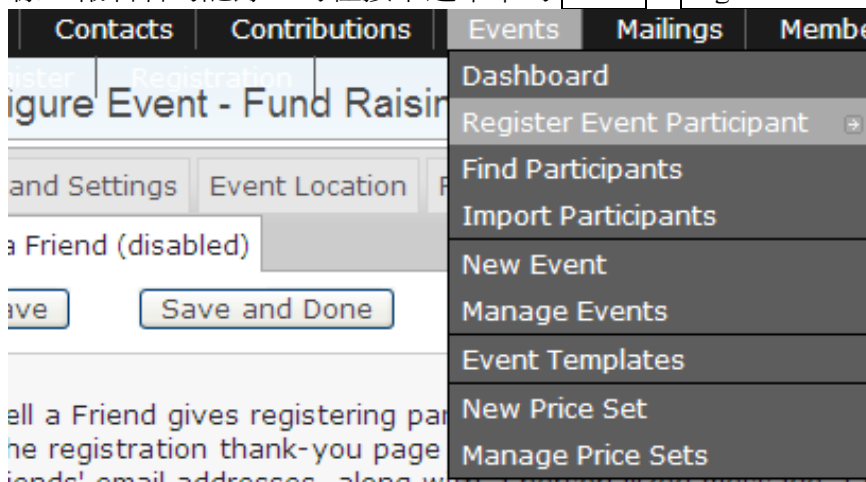
圖十六

1.3) 非線上活動報名

除了供外界人士線上報名，系統也可以處理不在線上報名的情況。

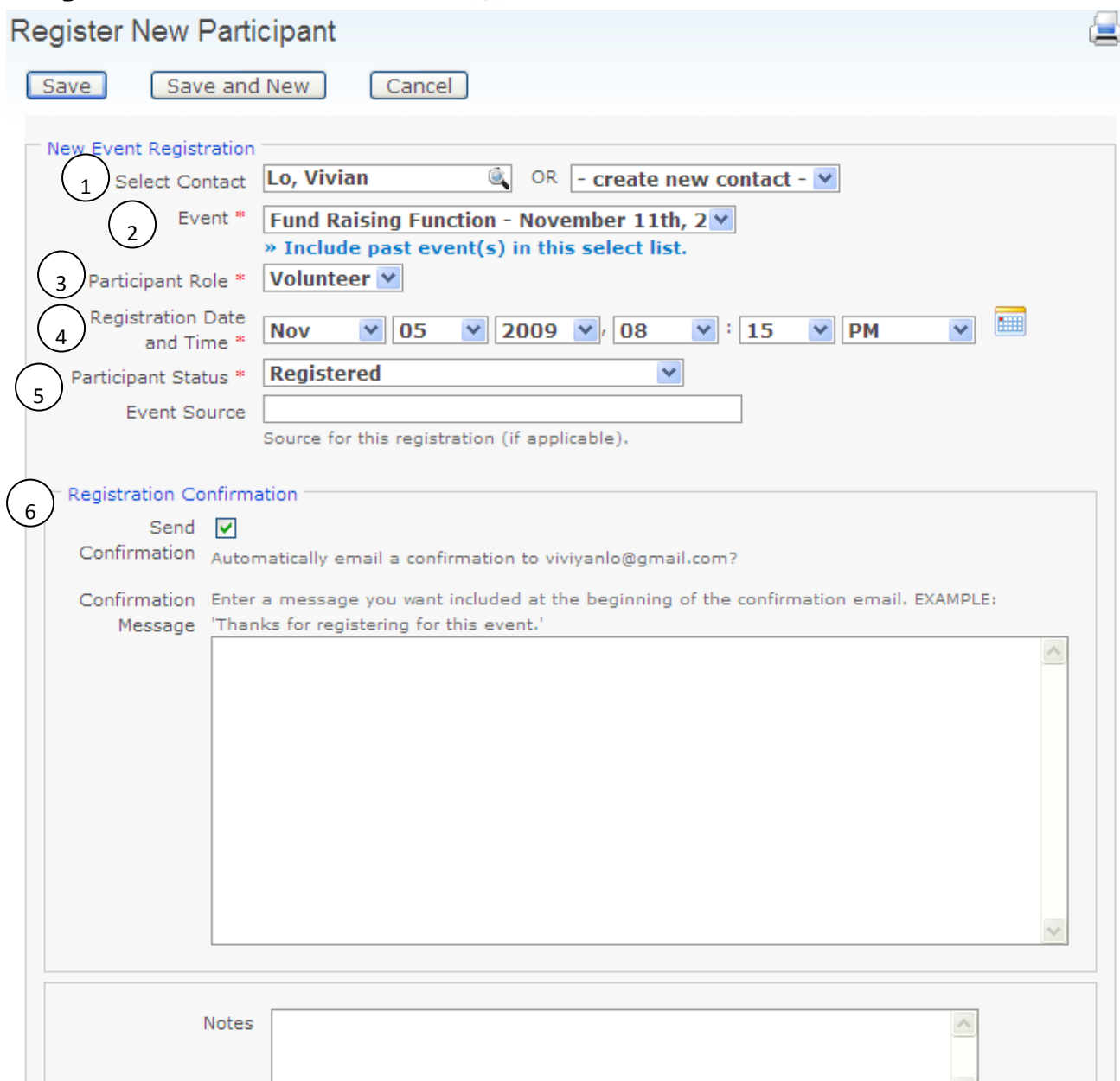
如果報名人仕是透過電話、郵寄表格或親身報名的話，資料便有機會以筆記本或 Excel Format 儲存下來。


如要加入一個非線上報名者的記錄，可在按下選單中的 **Events** → **Register Event Participant**。



圖十七

- ① Select Contact：選擇聯絡人或可以即時新增一個新記錄
- ② Event：選擇活動
- ③ Participant Role：報名者身份
- ④ Registration Date and Time：報名日期及時間
- ⑤ Participant Status：報名狀態
- ⑥ Registration Confirmation：發送確認郵件



Register New Participant 


Save Save and New Cancel

New Event Registration

① Select Contact OR

② Event *
» Include past event(s) in this select list.

③ Participant Role *

④ Registration Date and Time * , : 

⑤ Participant Status *

Event Source
Source for this registration (if applicable).

⑥ **Registration Confirmation**

Send

Confirmation Automatically email a confirmation to vivianlo@gmail.com?

Confirmation Message Enter a message you want included at the beginning of the confirmation email. EXAMPLE: 'Thanks for registering for this event.'

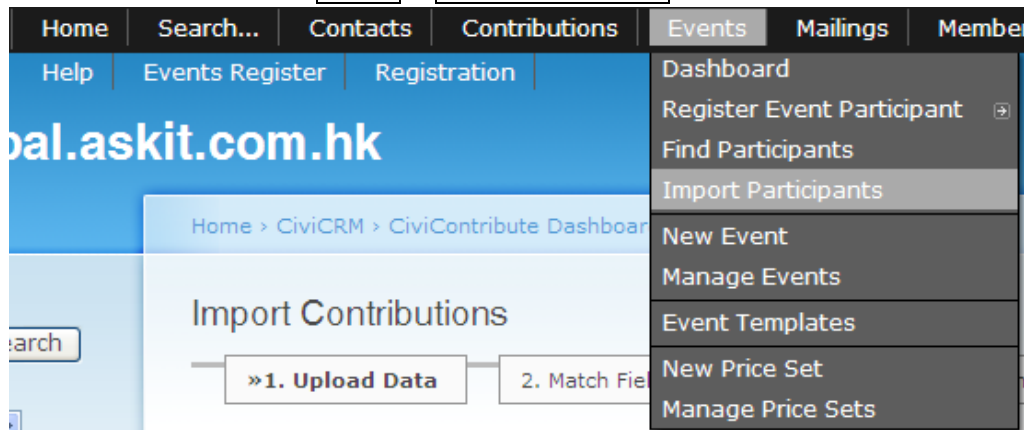
Notes

圖十八

1.4) 匯入報名記錄

與加入聯絡人記錄一樣，報名人的資料也可透過匯入功能去處理來輸入系統，所以在此不作詳細示範。

如要匯入報名記錄，可到菜單的 **Events** → **Import Participants**，並進入圖二十畫面。



圖十九

Import Contributions

»1. Upload Data | 2. Match Fields | 3. Preview | 4. Summary

Upload Data (step 1 of 4)

The Contribution Import Wizard allows you to easily upload contributions from other applications into CiviCRM. Files to be imported must be in the 'comma-separated-values' format (CSV) and must contain data needed to match the contribution to an existing contact in your CiviCRM database.

?

Import Data File *

File format must be comma-separated-values (CSV).

Maximum Upload File Size: 2 MB

First row contains column headers

Check this box if the first row of your file consists of field names (Example: 'Contact ID', 'Amount').

Contact Type Individual Household Organization

Select 'Individual' if you are importing contributions made by individual persons. Select 'Organization' or 'Household' if you are importing contributions made by contacts of that type.

Import mode Insert new contributions Update existing contributions

?

Date Format yyyy-mm-dd OR yyyyymmdd (1998-12-25 OR 19981225) OR (2008-9-1 OR 20080901)

mm/dd/yy OR mm-dd-yy (12/25/98 OR 12-25-98) OR (9/1/08 OR 9-1-08)

mm/dd/yyyy OR mm-dd-yyyy (12/25/1998 OR 12-25-1998) OR (9/1/2008 OR 9-1-2008)

Month dd, yyyy (December 12, 1998)

dd-mon-yy OR dd/mm/yy (25-Dec-98 OR 25/12/98)

dd/mm/yyyy (25/12/1998) OR (1/9/2008)

圖二十

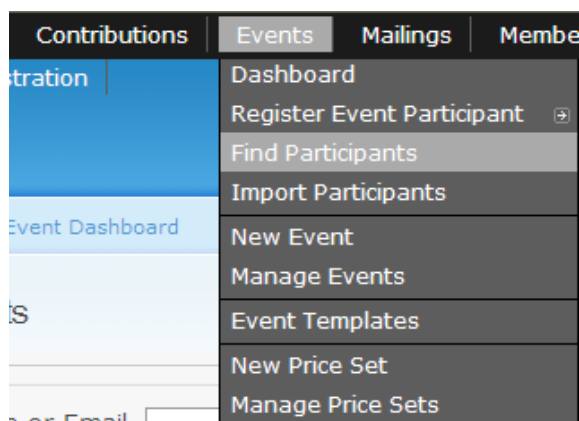
2. 排程發送郵件

雖然已經募集了足夠的義工，也有不少人士對此嘉年華會深感興趣，並表示出席，但您仍有必要在活動開幕前夕，為出席人士作出溫馨提示。因此，您決定安排向出席者發送一個電子郵件。

2.1) 設置電郵群組

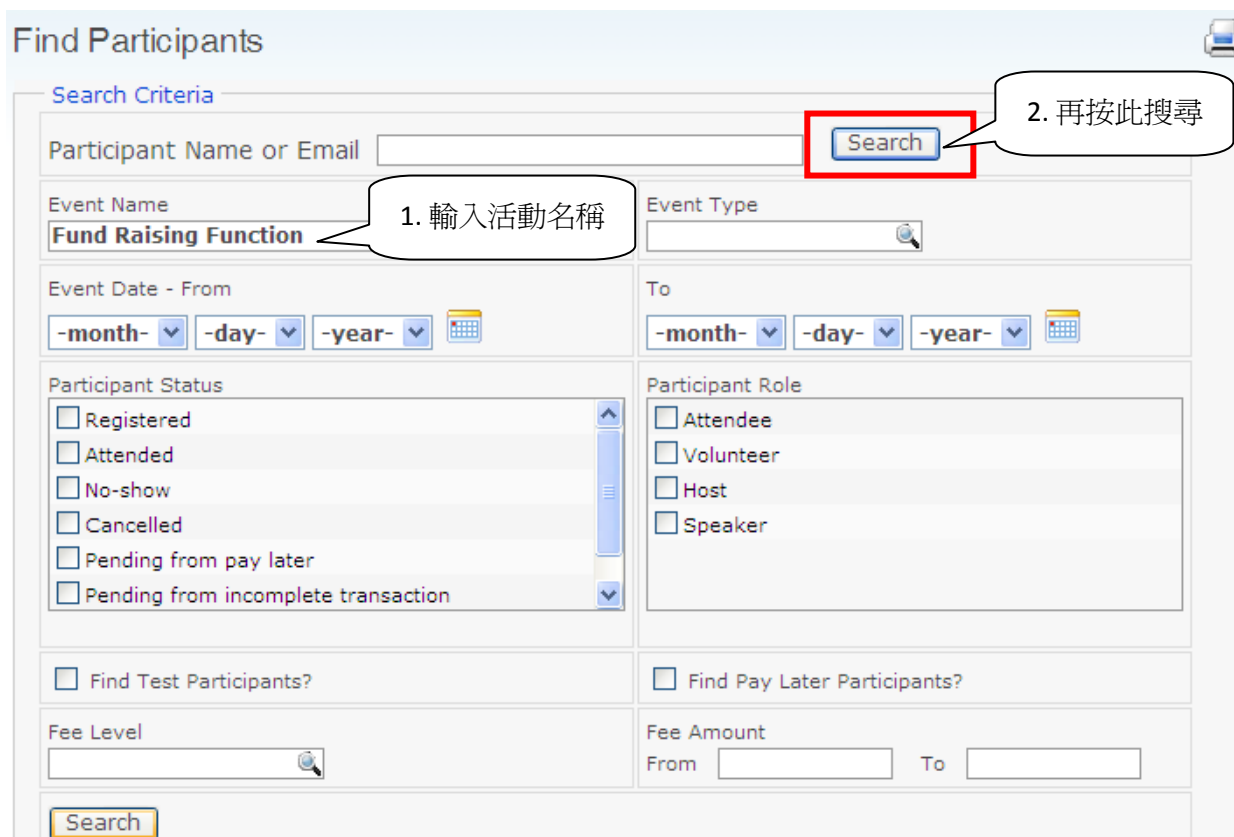
首先，您要為已報名的人士建立一個群組，這樣可方便一次性地發送所有郵件。

請在選單中按下 **Events** → **Find Participants**。



圖二十一

在此搜尋頁，請您在 **Event Name** 中輸入剛才建立的活動(Fund Raising Function)，然後按 **Search**。



The screenshot shows the 'Find Participants' interface with the following fields and callouts:

- Search Criteria** section:
- Participant Name or Email**: Input field.
- Event Name**: Input field containing "Fund Raising Function". Callout 1: "1. 輸入活動名稱".
- Event Type**: Dropdown menu.
- Event Date - From**: Fields for month, day, and year.
- To**: Fields for month, day, and year.
- Participant Status**: List of checkboxes including Registered, Attended, No-show, Cancelled, Pending from pay later, and Pending from incomplete transaction.
- Participant Role**: List of checkboxes including Attendee, Volunteer, Host, and Speaker.
- Find Test Participants?** and **Find Pay Later Participants?**: Checkboxes.
- Fee Level**: Input field.
- Fee Amount**: From and To input fields.
- Search** button: Callout 2: "2. 再按此搜尋".

圖二十二

這便是參與 Fund Raising Function 活動的出席人仕，可以選①All 3 records，再選②New Smart Group 建立一個群組，然後按 Go。

Find Participants

3 Results 1 Event = Fund Raising Function ...AND...
Event Type - Fundraiser

Select Records: All 3 records Selected records only

3

- more actions -

- Batch Update Participants Via Profile
- Cancel Registration
- Change Participant Status
- Delete Participants
- Export Participants
- New Smart Group
- Send Email to Contacts

	Par	Amount	Event Date(s)	Registered	Status	Role	
<input type="checkbox"/>	noc	00.00	November 11th, 2009 - November 13th, 2009	November 6th, 2009	Pending from pay later	Volunteer	View Edit Delete
<input type="checkbox"/>	Common, Junior	Fund Raising Function 100	HK\$ 100.00	November 11th, 2009 - November 13th, 2009	November 6th, 2009	Pending from pay later	Volunteer View Edit Delete
<input type="checkbox"/>	Common, Lo	Fund Raising Function 100	HK\$ 100.00	November 11th, 2009 - November 13th, 2009	November 6th, 2009	Pending from pay later	Volunteer View Edit Delete

2

圖二十三

然後輸入群組名稱，並儲存此群組 Save Smart Group。

Smart Group


Smart Group

Name *


Description

Number of selected participants: 3

圖二十四

Find Participants 

i Your smart group has been saved as 'Fund participants'.

 Edit Search Criteria

6 Results
Select Records: All 6 records Selected records only




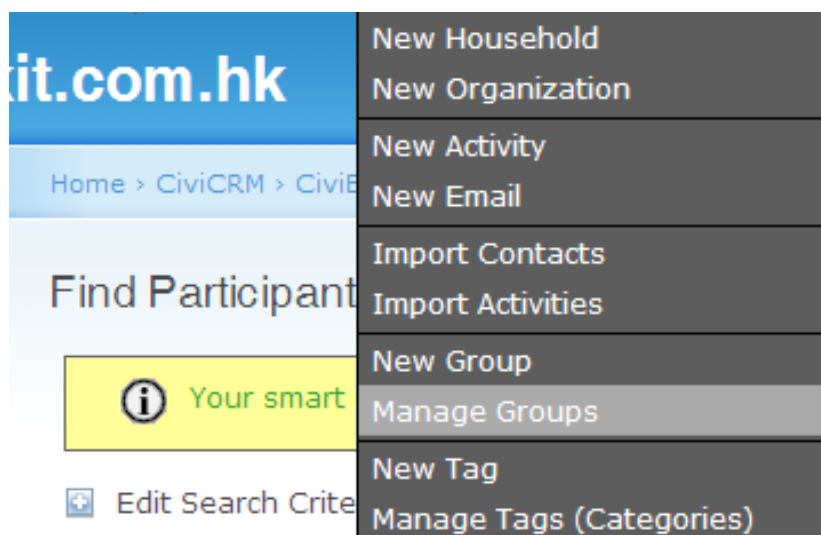
<input type="checkbox"/>	Participant	Event	Fee Level	Amount	Event Date(s)	Registered	Status	Role	
<input type="checkbox"/>	 Common, Lo	template	(no fee)		November 29th, 2009 - December 15th, 2009	October 30th, 2009	Registered	Volunteer	View Edit Delete
<input type="checkbox"/>	 黎, Kong	Exhibition	free seat	HK\$ 0.00	November 28th, 2009 - November 30th, 2009	November 2nd, 2009	Attended	Volunteer	View Edit Delete
<input type="checkbox"/>	 01, student	Exhibition	free seat	HK\$ 0.00	November 28th, 2009 - November 30th, 2009	November 2nd, 2009	Registered	Attendee	View Edit Delete

圖 二十五

儲存後，便需要把這個群組歸納為其中一個電子郵寄的清單。
在菜單中按下 **Contacts** → **Manage Groups**




it.com.hk

Home > CiviCRM > CiviCRM

Find Participant

i Your smart group has been saved as 'Fund participants'.

 Edit Search Criteria

- New Household
- New Organization
- New Activity
- New Email
- Import Contacts
- Import Activities
- New Group
- Manage Groups**
- New Tag
- Manage Tags (Categories)

圖 二十六

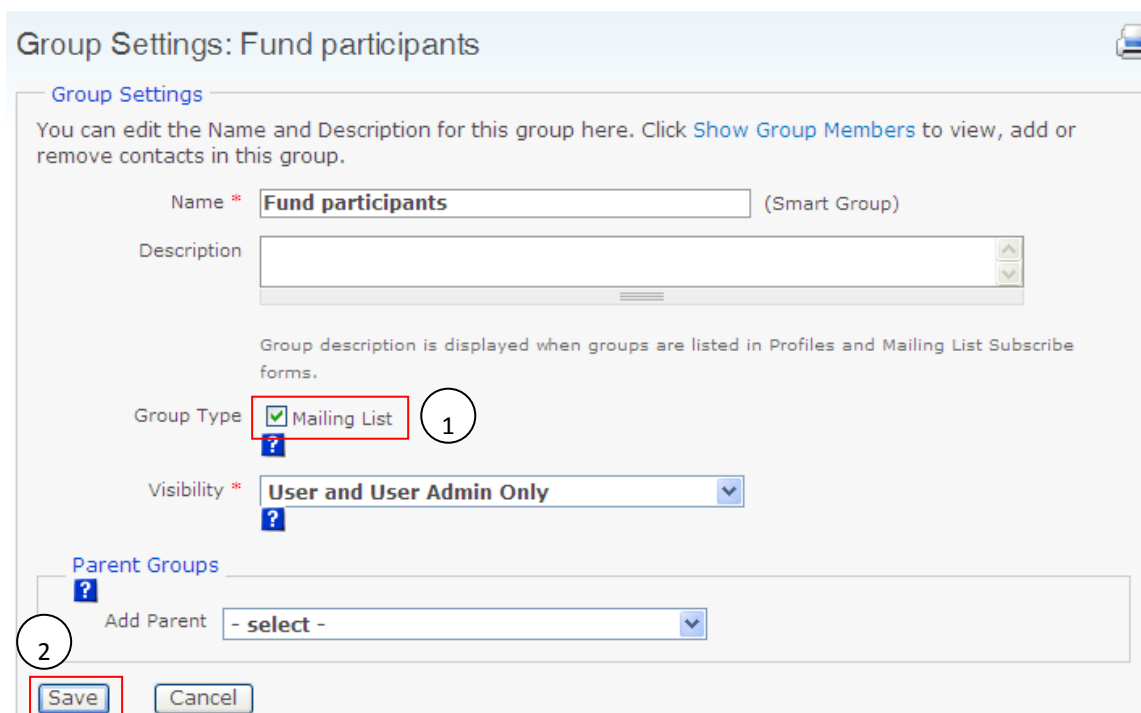
現在要把群組 Fund participants 列入 Mailing List，找出 Fund participants，然後按下 Settings

Fund participants (Smart Group)	8		User and User Admin Only	Members Settings ▶ more
mailing group	5	Mailing List	User and User Admin Only	Members Settings ▶ more
Newsletter mailing list	4	Group user for newsletter mailing list	Mailing List User and User Admin Only	Members Settings ▶ more
young customer	6	> age 18 < age 40	Access Control, Mailing List User and User Admin Only	Members Settings ▶ more

[» New Group](#)

圖 二十七

接著別選①Mailing List，②Save 便完成此工作。



Group Settings: Fund participants

You can edit the Name and Description for this group here. Click [Show Group Members](#) to view, add or remove contacts in this group.

Name * (Smart Group)

Description

Group description is displayed when groups are listed in Profiles and Mailing List Subscribe forms.

Group Type Mailing List 1

Visibility *

Parent Groups

Add Parent

2

圖 二十八

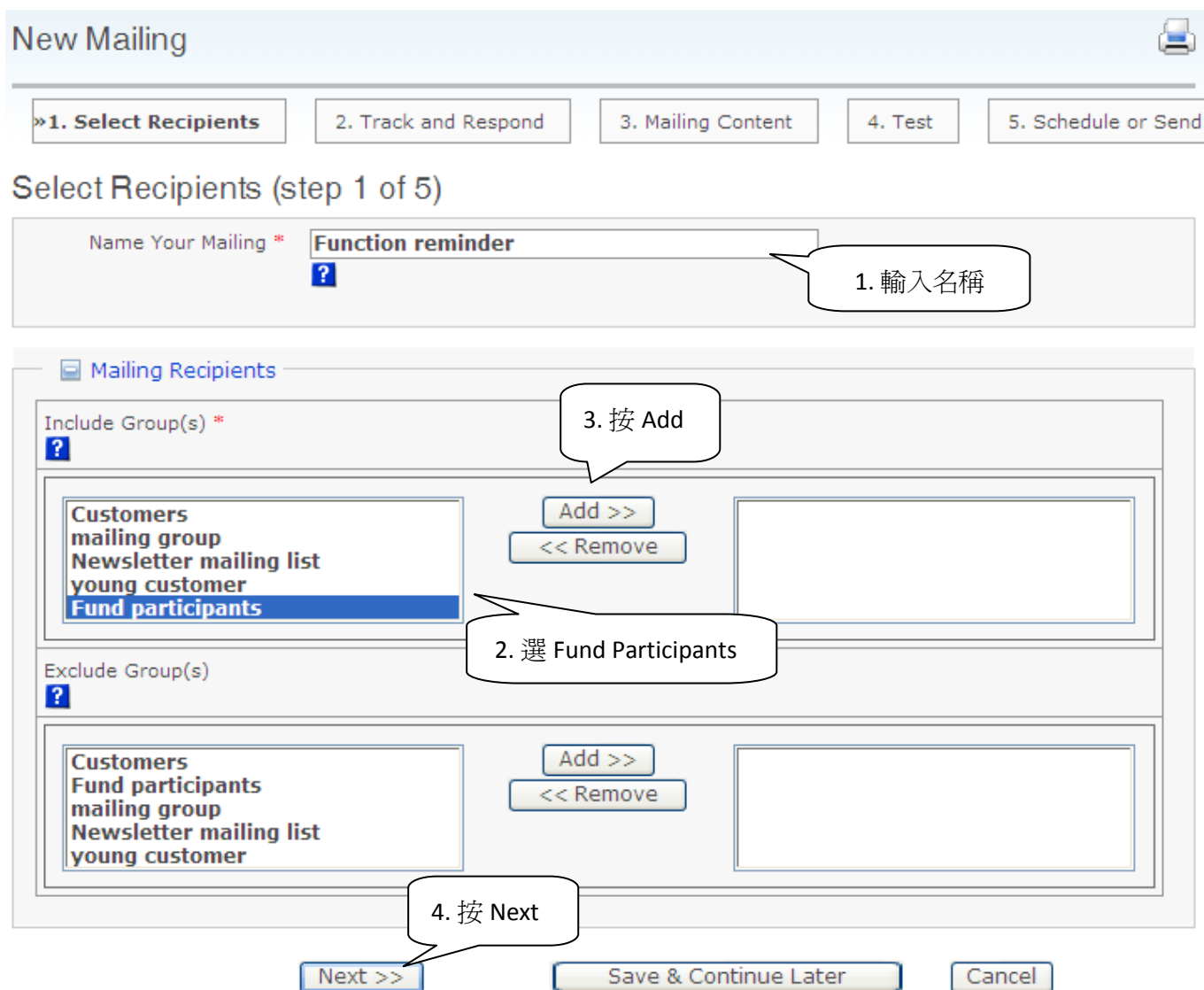
然後便可以為這一個特定的群組設定要發送的提示郵件。

Contributions	Events	Mailings	Memberships	Reports	Other
Administration		New Mailing			
		Draft and Unscheduled Mailings			
		Scheduled and Sent Mailings			
		Archived Mailings			
Mail		Headers, Footers, and Automated Messages			
		Message Templates			
		From Email Addresses			

圖 二十九

發送電子郵件到一個群組需經過 5 個大步驟：

- 第一步需要輸入電郵工作名稱及選擇收件群組，如圖三十所示，然後按 **Next**。
- 第二步是設定一些查閱功能，追蹤及回應收件者的不同回應，一般情況可按 **Next** 跳過此步驟。
- 第三步是撰寫電郵內容。
- 第四步是測試電郵的發送功能。
- 第五步是即時發送已完成的郵件或把此郵件排程送出。



The screenshot shows the 'New Mailing' interface with five steps: 1. Select Recipients, 2. Track and Respond, 3. Mailing Content, 4. Test, and 5. Schedule or Send. The 'Select Recipients (step 1 of 5)' section includes a 'Name Your Mailing' field with the text 'Function reminder' and a callout '1. 輸入名稱'. Below this are 'Include Group(s)' and 'Exclude Group(s)' sections, each with a list of groups and 'Add >>' and '<< Remove' buttons. A callout '3. 按 Add' points to the 'Add >>' button in the 'Include Group(s)' section. Another callout '2. 選 Fund Participants' points to the 'Fund participants' group in the 'Include Group(s)' list. A callout '4. 按 Next' points to the 'Next >>' button at the bottom of the interface. Other buttons at the bottom include 'Save & Continue Later' and 'Cancel'.

圖三十

如無特別情況(如自動回應收件人的回信、追蹤收件人的閱讀情況)，此步驟可跳過。

Track and Respond (step 2 of 5)

These settings control tracking and responses to recipient actions. The number of recipients selected to receive this mailing is shown in the box to the right. If this count doesn't match your expectations, click **Previous** to review your selection(s).

Total Recipients: 3

Tracking

Track Click-throughs?
 Track the number of times recipients click each link in this mailing. NOTE: When this feature is enabled, all links in the message body will be automatically re-written to route through your CiviCRM server prior to redirecting to the target page.

Track Opens?
 Track the number of times recipients open this mailing in their email software.

Responding

Forward Replies?
 If a recipient replies to this mailing, forward the reply to the FROM Email address specified for the mailing.

Auto-respond to Replies? **Auto-responder**
 If a recipient replies to this mailing, send an automated reply using the selected message.

Unsubscribe Message * **Unsubscribe Message**
 Select the automated message to be sent when a recipient unsubscribes from this mailing.

Resubscribe Message * **Resubscribe Message**
 Select the automated message to be sent when a recipient resubscribes to this mailing.

Opt-out Message * **Opt-out Message**
 Select the automated message to be sent when a recipient opts out of all mailings from your site.

圖 三十一

然後可以開始編輯郵件的內容

Mailing Content (step 3 of 5)

You can either **upload** the mailing content from your computer OR **compose** the content on this screen. Click the help (?) icon for more information on formats and requirements.

Total Recipients: 3

From Email Address * **"FIXME" <info@FIXME.ORG>**
 ?

Mailing Subject *
 ?

Override VERP address?
 ?

I want to Upload Content Compose On-screen
 ?

Compose On-screen

Use Template **- select -**
 ?

Insert Tokens
 ?

▼ HTML Format

B I U 字體 大小
 ?

原始碼
 ?

2. 電郵主旨，在此可輸入 Event Reminder

1. 寄件者電郵，可於 Administer → Configure → FROM Email Address 修改

3. 編寫電郵內容

圖 三十二

由於現時垃圾電郵 (Spam Email) 問題猖獗，此系統也強制發送電郵時需要迎合收件者的個人喜好，您便需利用 Insert Tokens，然後選 Opt out via email 去阻止發送電郵到不要接收電郵的聯絡人。

另外還要輸入另一個 Domain (organization) address 去顯示公司的地址。

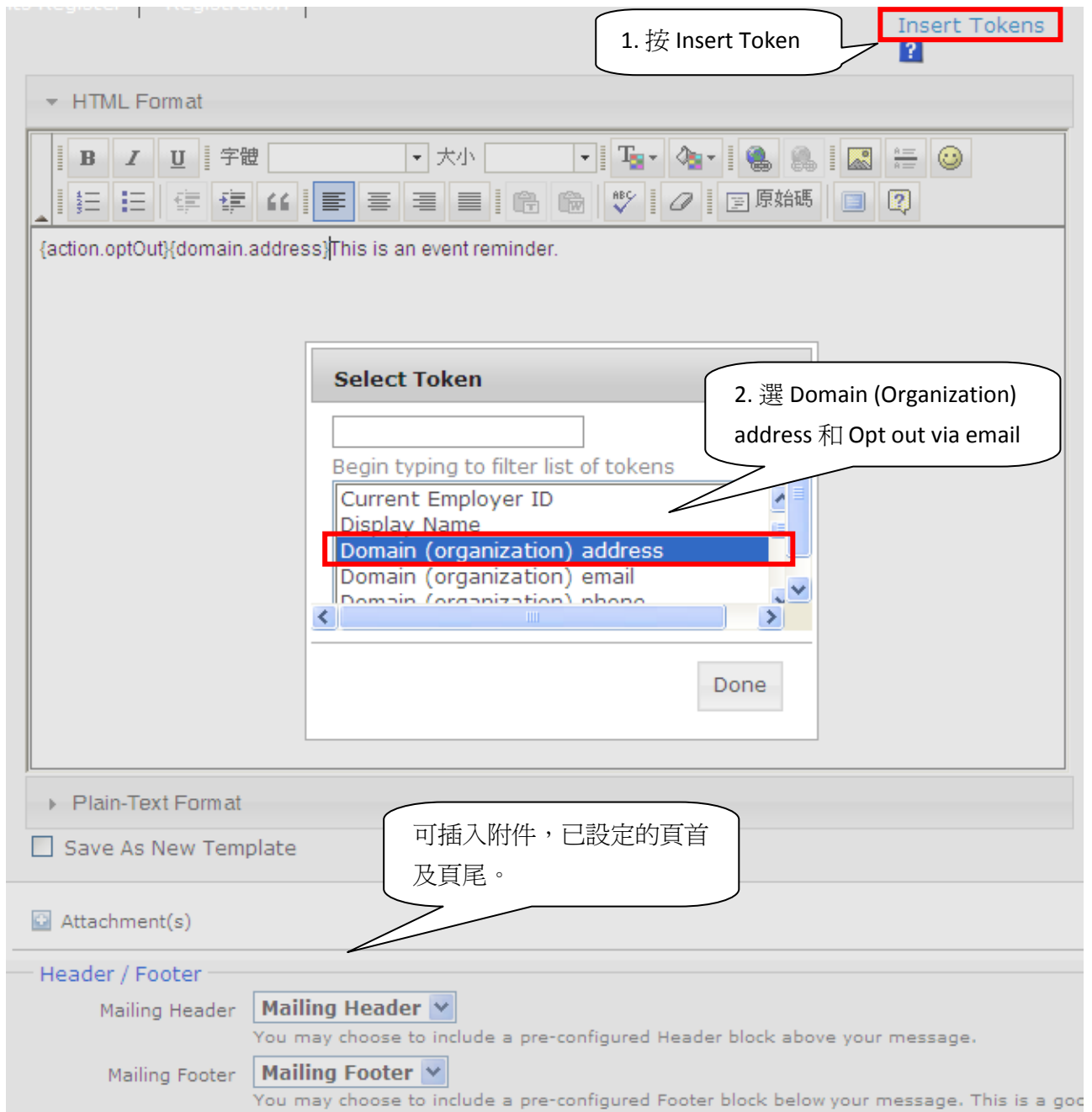


圖 三十三

接著可作一個發送電郵的測試，此步驟同樣可以按 **Next** 跳過。另外還有預覽電郵的功能，來檢視發送的內容。

Test (step 4 of 5)

It's a good idea to test your mailing by sending it to yourself and/or a selected group of people in your organization. You can also view your content by clicking (+) Preview Mailing. Total Recipients: 3

Test Mailing

Send to This Address (filled with your contact's token values)

Send to This Group **- none -**

Preview Mailing

Subject: Reminder

HTML Version:

Sample Header for HTML formatted content.

mailto:o...@FIXME.ORG
 S 15S El Camino Way E
 Collinsville, CT 6022
 United States
 This is an event reminder.

Sample Footer for HTML formatted content.

圖 三十四

最後便可以選擇即時發送或安排特定的時間發送此郵件。

Schedule or Send (step 5 of 5)

You can schedule this mailing to be sent starting at a specific date and time, OR you can request that it be sent as soon as possible by checking "Send Immediately". Total Recipients: 3

Send Immediately

OR

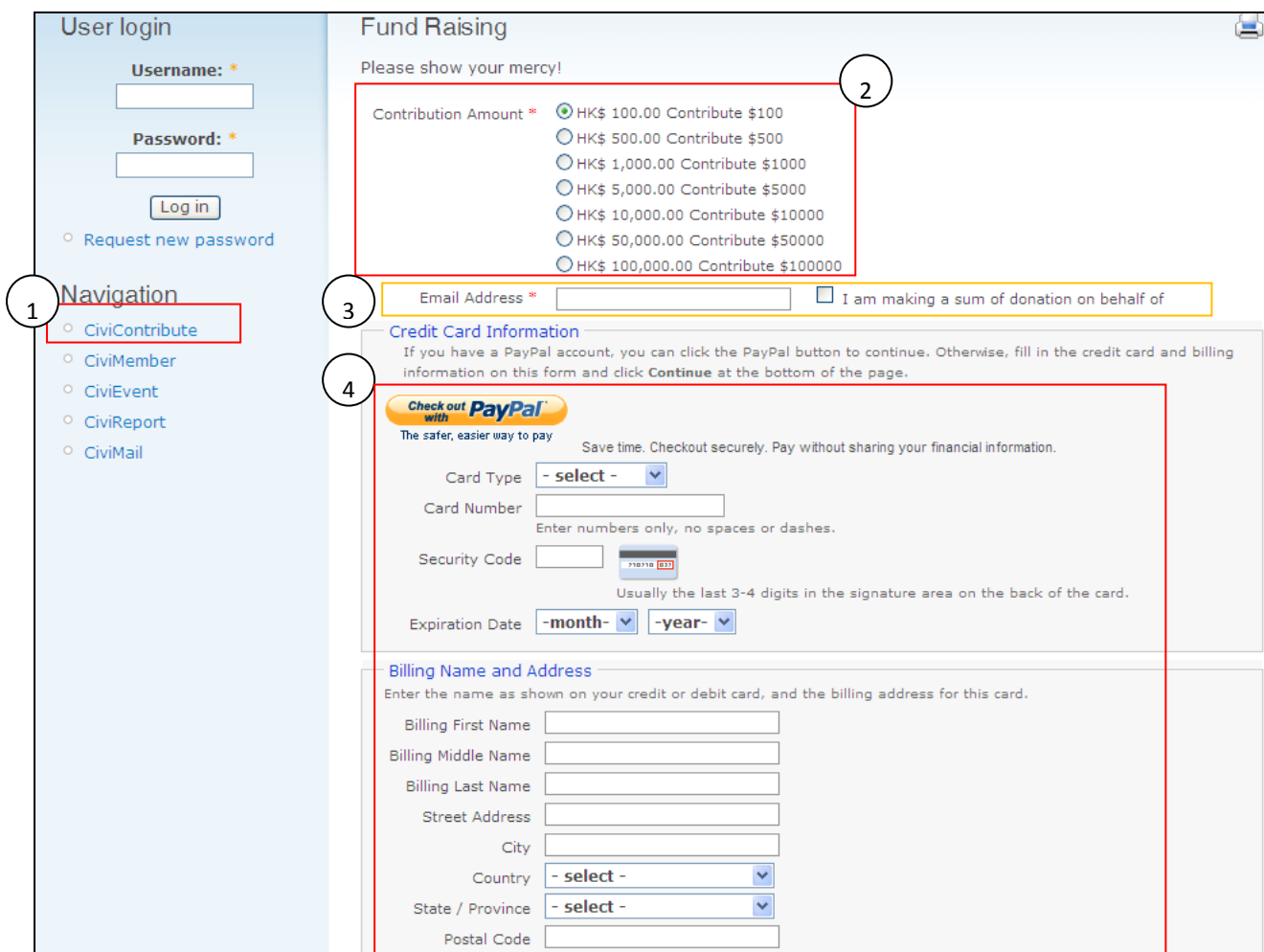
Schedule Mailing **-month-** **-day-** **-year-** **-hour-** : **-min-** **-AM/PM-**

Set a date and time when you want CiviMail to start sending this mailing.

圖 三十五

3. 線上捐款

系統亦同時支援線上捐款的功能，但需要建立 PayPal 帳戶，所以此堂只會簡介此功能。
 按下 CiviContribute，然後可設定及選擇捐款的數目。
 然後需要輸入個人及信用卡的資料。



The screenshot shows the 'Fund Raising' section of a website. On the left is a 'User login' sidebar with fields for 'Username' and 'Password', a 'Log in' button, and a 'Request new password' link. Below this is a 'Navigation' menu with links for 'CiviContribute', 'CiviMember', 'CiviEvent', 'CiviReport', and 'CiviMail'. The main 'Fund Raising' area is titled 'Please show your mercy!' and contains several sections:

- Contribution Amount:** A list of radio button options for donation amounts: HK\$ 100.00, HK\$ 500.00, HK\$ 1,000.00, HK\$ 5,000.00, HK\$ 10,000.00, HK\$ 50,000.00, and HK\$ 100,000.00. A red box labeled '2' highlights this section.
- Email Address:** A text input field and a checkbox labeled 'I am making a sum of donation on behalf of'. A yellow box labeled '3' highlights this section.
- Credit Card Information:** A section with a note about PayPal and a 'Check out with PayPal' button. Below it are fields for 'Card Type', 'Card Number', 'Security Code', and 'Expiration Date'. A red box labeled '4' highlights this section.
- Billing Name and Address:** A section with a note to enter the name as shown on the credit card and fields for 'Billing First Name', 'Billing Middle Name', 'Billing Last Name', 'Street Address', 'City', 'Country', 'State / Province', and 'Postal Code'.

圖 三十六

4. 報表功能

假設現在嘉年華會已完滿結束，但您想觀察此活動的出席人數、收入等等的資料，這樣便可以利用系統的報表工具，來清楚顯示統計結果。雖然報表類型眾多，但變化大同小異，所以會集中討論活動出席者的列表，去研究活動成效。

請在菜單中選 **Reports** → **Event Participant Report(List)**。

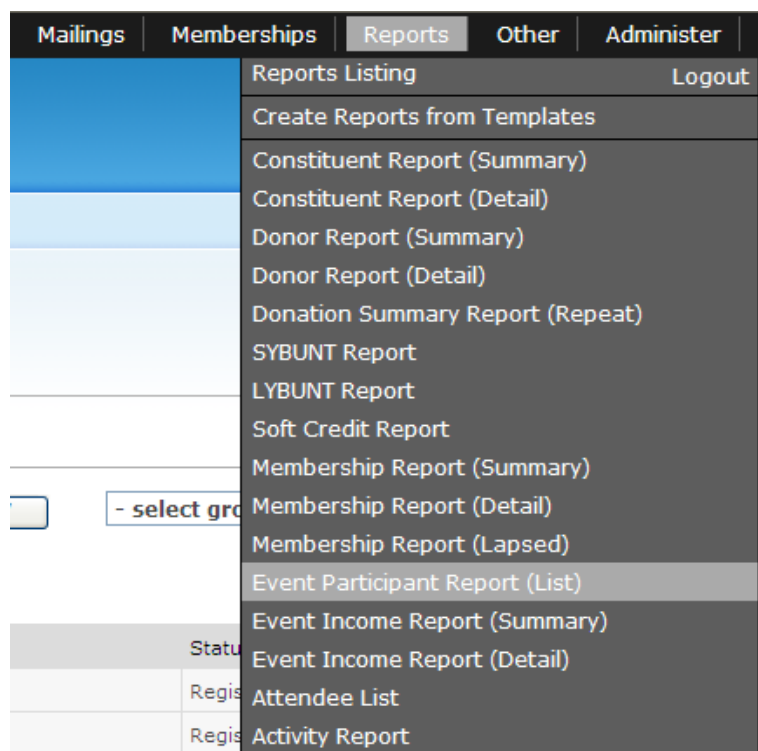
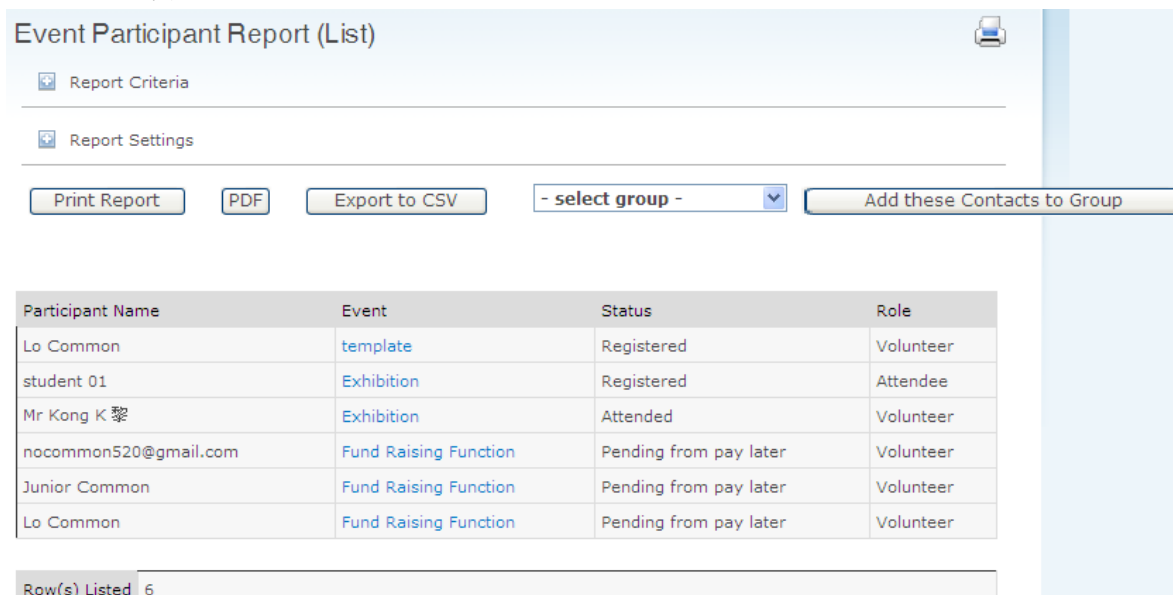


圖 三十七

這樣便觀察到以往所有活動的參與者或缺席人仕。如要只顯示指定活動的情況，可以打開 **Report Criteria** 來更改。



Event Participant Report (List)

Report Criteria

Report Settings

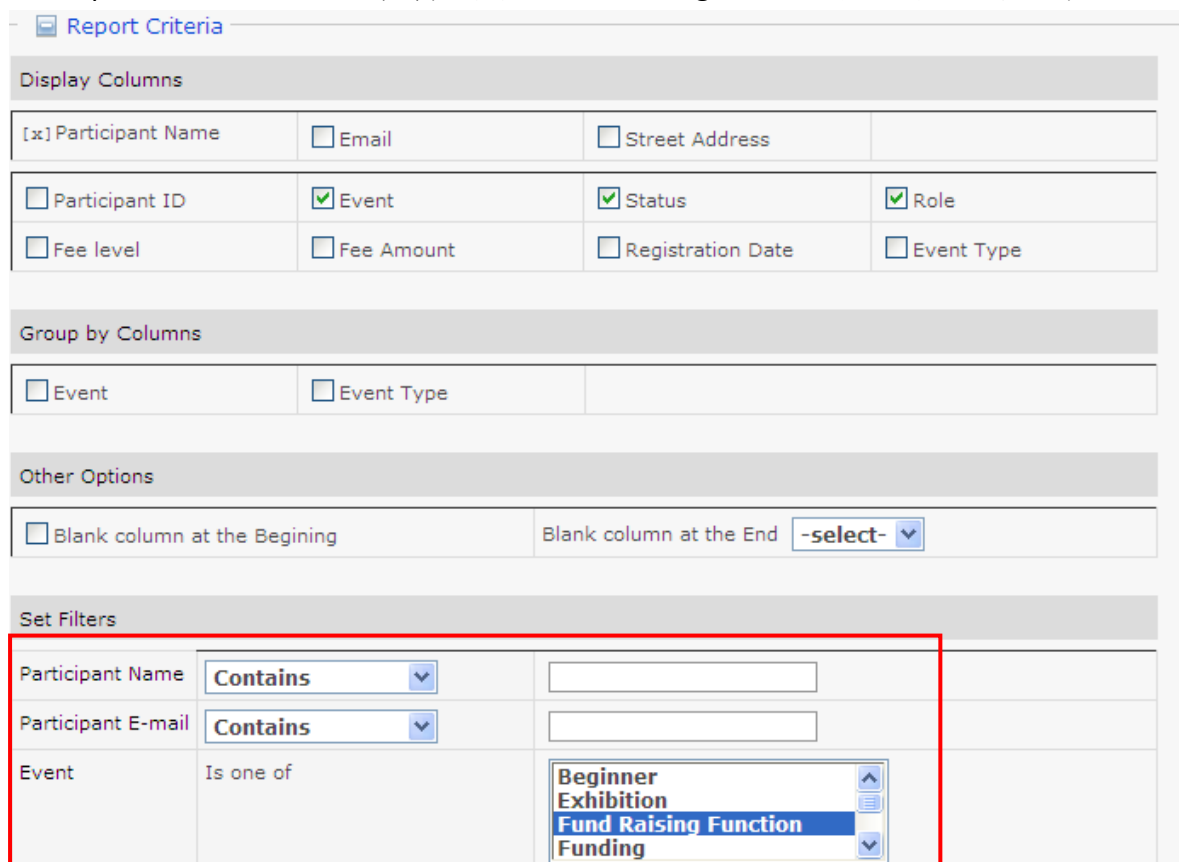
Print Report PDF Export to CSV - select group - Add these Contacts to Group

Participant Name	Event	Status	Role
Lo Common	template	Registered	Volunteer
student 01	Exhibition	Registered	Attendee
Mr Kong K 黎	Exhibition	Attended	Volunteer
nocommon520@gmail.com	Fund Raising Function	Pending from pay later	Volunteer
Junior Common	Fund Raising Function	Pending from pay later	Volunteer
Lo Common	Fund Raising Function	Pending from pay later	Volunteer

Row(s) Listed 6

圖 三十八

打開 Report Criteria 後，在 Event 中選其中一個或多個活動(如 Fund Raising Function)，然後按 Preview Report ，便會只出現 Fund Raising Function 此活動的相關人仕。



Report Criteria

Display Columns

<input checked="" type="checkbox"/> [x] Participant Name	<input type="checkbox"/> Email	<input type="checkbox"/> Street Address	
<input type="checkbox"/> Participant ID	<input checked="" type="checkbox"/> Event	<input checked="" type="checkbox"/> Status	<input checked="" type="checkbox"/> Role
<input type="checkbox"/> Fee level	<input type="checkbox"/> Fee Amount	<input type="checkbox"/> Registration Date	<input type="checkbox"/> Event Type

Group by Columns

<input type="checkbox"/> Event	<input type="checkbox"/> Event Type	
--------------------------------	-------------------------------------	--

Other Options

Blank column at the Beginning Blank column at the End

Set Filters

Participant Name	Contains	
Participant E-mail	Contains	
Event	Is one of	<ul style="list-style-type: none"> Beginner Exhibition Fund Raising Function Funding

圖 三十九

然後可以把這個報表直接列印出來，甚至匯出為 PDF 或 CSV 格式的檔案。

Participant Name	Event	Status	Role
nocommon520@gmail.com	Fund Raising Function	Pending from pay later	Volunteer
Junior Common	Fund Raising Function	Pending from pay later	Volunteer
Lo Common	Fund Raising Function	Pending from pay later	Volunteer

Row(s) Listed 3

圖 四十

這便是以 PDF 格式匯出的活動出席人仕報表。

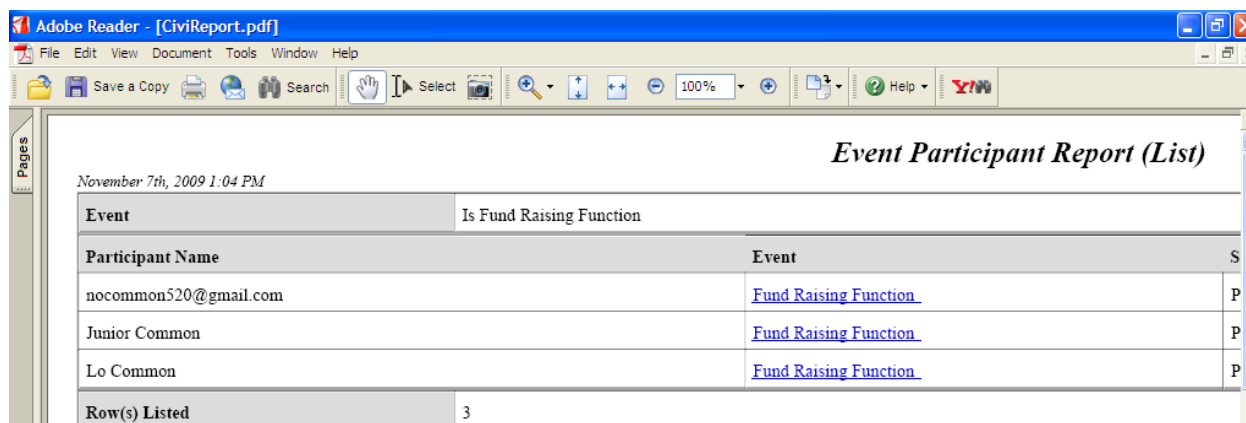


圖 四十一