North Shore Choral Society

Design Decision/Requirements document

The purpose of this document is to record options for recording mailing/emailing/solicitation communication preferences in the CiviCRM database, and document what we will do for the initial implementation of CiviCRM.

Since the focus of the initial implementation is to "replace what we have been doing with dBase" with CiviCRM functions, the first thing to analyze is what we are doing currently. (Other projects later may expand how NSCS uses CiviCRM.)

Current Practices

dBASE

The current dBASE system has a single MAILING field that is used to control **USPS mailings**. If MAILING=NO (false), we will not select that contact's record for the yearly brochure mailing or for mailing label creation for the fall and spring patron appeals. (MAILING is <u>not</u> one of the selection criteria for patron thank you letters, so donation data will be included even when MAILING=NO.)

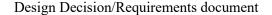We (manually) set MAILING=NO for:

- Donors who give to the NSCS because of a request by family members to send donations to NSCS in memory of a deceased person.

- NSCS members who live with another NSCS member. In general we have only one record per household (family unit residing together), but when two members of a household are NSCS members, we need a record for each of them. We mark one of the records as MAILING=NO to suppress multiple mailings to that household.

- People who notify us that they do not want to receive mailings from us, or whom we are told have died. We change the MAILING field rather than deleting these people from the database because their records may be related to records in other tables (e.g., donations and ticket sales). In the past we have sometimes also changed the name to reflect "Estate of" to acknowledge donations in the concert program booklet. In cases where there is a surviving family member at that address, we may change the name of the contact to the surviving contact only and not change the MAILING field.

- Corporations or businesses which give us a matching gift or other type of donation. (I'm not sure that this has been done consistently; we'll need to do more analysis as this data is imported into CiviCRM. But is this what is intended? Or do we want to send mailings to corporations/businesses?)

We record an **email address** in dBase for members (so that we can include email addresses on the membership list). We have also been recording them for those who buy tickets or donate via PayPal. Last year we recorded emails when we received them with Workshop registrations. But we don't use dBase for sending emails and except for members we don't have very many email addresses recorded.

The above is my understanding of what we are currently doing. This was verified by Computer Services (Dan Woodard, Jim Miller, Ellen Pullin) and others involved with mailings and data entry: Steve Warner (Patrons Coordinator), Emily Rivera (Membership Coordinator), and Karen Rigotti (General Manager).

There is also a NO_SOLICIT field in dBase, but no NSCS queries use it – it was established for Symphony II / CPO. It's a very confusing name – does YES in NO_SOLICIT mean do not mail? Anyway, there is no intention to import this field.

CiviCRM

The new database system is much more focused on emails than USPS mailings. CiviCRM as delivered has several fields to record contact communication preferences and options.

- Do not email
- Do not mail
- Do not phone
- Do not SMS (text message)
- Do not trade (i.e., include in an exchange of mailing lists)
- Preferred Communication Method (email, mail, phone, SMS, or fax)
- Preferred Email Format (HTML, text, or both)
- No Bulk Emails (User Opt Out)
  [Note: This option is designed to be set by contacts themselves when they don't want to receive bulk email (they set it using the opt-out action from a CiviMail emailing.)]
- Phone location (Billing, Home, Main, Other, Work)
- Phone type (Phone, Mobile, Fax, Pager, Voicemail)
- Primary indicator (indicates which to use when there are multiple phone numbers, emails, or addresses recorded)

The values will determine what actions the system will take/allow. For example, contacts with 'Do not mail' will be excluded when mailing labels are created. Contacts with 'Do not email' will be excluded from receiving CiviMail mailings, and the Send Email activity will be disabled for them. (However they will still receive email for contribution receipts and event online registration confirmations.)

The design issues to resolve and document here are how to use these indicators, and whether these delivered CiviCRM fields are all that we will need for the initial implementation or the foreseeable future.

- There appears to be no way in CiviCRM to distinguish between publicity communications (e.g. season brochures) and donation solicitations (patron appeals). We don't have any way to do that now, but is that distinction something we want to be able to make?
- The distinction between "Do not email" and "Do not mail" indicators does **not** concern email vs postal mail. This is what the CiviCRM book says about

Communication preferences and privacy options

Communications preferences (i.e. methods of communication that are preferred by contacts) and privacy options (e.g. do not contact me via email) can be defined. Privacy options are respected when carrying out certain functions, e.g. mailing labels are not printed for contacts with the 'do not mail' privacy option, and emails are not sent to contacts with the 'do not email' privacy option.

Here is a brief explanation of each of the privacy options in the CiviCRM contact record:

- **Do not phone** - The end user has elected to not be contacted via telephone.
- **Do not email** - The end user has elected to not be contacted via email.
- **Do not mail** - The end user has elected to not be contacted via postal delivery (snail mail)
- **Do not SMS** - The end user has elected to not be contacted via text messaging service to their mobile device.
- **Do no trade** - The user has elected not to share their info with other organizations. (ie. you may not share or sell user's information to other parties)

Figure 1: //book.civicrm.org/user/current/organising-your-data/contacts/

What does the privacy option 'Do not email' mean?

If a contact has this option selected then you will not be able to send them individual or small volume emails using the **Send Email** action reached via the contact's record or after a search. They will not receive bulk emails sent through CiviMail, either. However they will still be sent scheduled reminders unless you specifically exclude them from those reminders. If the **Do not email** option is set manually after someone has contacted you in person, it is probably a good idea to exclude them from scheduled reminders. The *Schedule Reminders* chapter outlines how to do that.

Figure 2: //book.civicrm.org/user/current/email/maintaining-healthy-email-lists/

CiviCRM books : User and administrator guide for version 4.5. Published Sep 2014