

# Red Hen – Do you put all of your contacts in one basket?

**Dennis Solis** 

Site Building, April 20, 2013

#### Dennis Solis





- Over 30 years experience as software developer.
- Graduate of the Drupal Career Starter program
- Eight months of drupal development
- Writing the RedHen documentation
  - Module Installation
  - Implementation

#### Dennis Solis





- You can find me on
  - IRC channel #drupal-florida
  - drupal user name densolis
    - http://drupal.org/user/2229734
  - densolis@aol.com
  - Follow
    - Groups.drupal.org/florida

### Drupal Easy





- Thanks DE for sponsoring this room
- One of the organizers of DCFL
- Training & Consulting Company
- Drupal Easy Pod Cast
- One of my mentors



#### RedHen CRM Module

- Sponsored by Think Shout
- Maintainers:
  - Lev Tsypin (Partner at TS)
  - Tauno Hogue
  - Gabriel Carleton-Barnes
  - Brandon Lee
  - Sean Larkin (Partner at TS)





#### What does CRM mean?



- Customer Relationship Management
- Constituent Relationship Management
- Contact Relationship Management

#### What does a CRM do?



- A CRM Module should:
  - Contact Management
  - Customer Relationship Management
  - Sales Force Automation
    - Track sales leads from the time they are obtained until the sales are closed

# Why use a CRM?



- Manage members and donors
- Maintain connections between individuals and organizations
- Handle events
- Track user engagement

### Drupal CRM Modules



- Redhen
- CiviCRM
- CRM Core
- Debut RedHen
- SalesForce CRM
- SugarCRM Connector





#### Webform CRM Modules



- Webform
  - Vtiger CRM
  - CiviCRM
  - Sugar







#### **CRM** Core





- It supports following types of entities:
  - Contacts & relationships between contacts.
  - Activities (contact interaction info).
  - Each of these are fieldable entities
  - User
- 147 Sites
- Have to add membership renewal.

#### CiviCRM





- Bolted on top of Drupal
- Works great out of the box
- Hard to customize dealing with:
  - Two different sets of API
  - Two different database schemas
  - Two different theming systems
  - Extensive knowledge required to make both work

### SugarCRM



- Complicated
- Need experienced developers
- Integrates with a 3<sup>rd</sup> party solution
- More of an enterprise level product



# Why a native CRM?



- A more seamless user experience
- Drupal's mobile and responsive tools
- Integrate CRM data with Drupal tools
- Decreased staff training costs
- Potential reductions in technical risk
- Potential reductions in IT costs

#### RedHen





- Architecture Wanted to
  - Keep the software lean
  - Maintain a stable platform
  - Plays well with other modules
    - Rules, Views, etc.
  - But does not depend on them

### Why use RedHen?





- Native Drupal
- Excels as Association Management
- The Drupal Association
  - Member Organizations (Drupal Easy)
    - Organization has contacts
      - Employees
      - Customers
- Include event registration with contacts
- Sales Force CRM integration module

#### RedHen





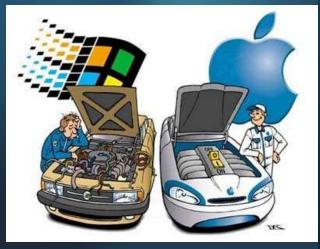
- Dependency
  - Relation
  - Entity API
  - -Message
    - Required by Activity module

#### Which CRM is best?



- Same argument as:
  - Ford vs Chevy
  - Windows vs Mac vs Linux
  - Google vs Bing
  - IE vs Firefox vs Chrome







#### Sons of AMVETS





Replacing the Son of AMVETS

Currently: ALL paper & snail mail

Future: All forms will be processed on-line

#### Sons of AMVETS





- Adding:
  - Membership management
  - Membership renewal
  - Payment tracking
  - Charity project reporting management
  - Create on-line forms to process miscellaneous paper forms

#### Sons of AMVETS





The Sons currently have 23,000 members.

- Red Hen will be used for
  - Membership management
  - Membership renewal
  - Event Registration







- Children
- Aunts and Uncles
- 1st Cousins
- Distant relatives

- Children
  - Activity





- Children
  - Activity
  - Contact





Horse's sporting supplies con



- Children
  - Activity
  - Contact
  - Engagement scoring

Hones worth spingles con



- Children
  - Activity
  - Contact
  - Engagement scoring
  - Fields

thems/inputinghispAris.com



- Children
  - Activity
  - Contact
  - Engagement scoring
  - Fields
  - Notes

Horses contingnaples con



- Children
  - Activity
  - Contact
  - Engagement scoring
  - Fields
  - Notes
  - Organization

bonics confingraphics con



- Children
  - Activity
  - Contact
  - Engagement scoring
  - Fields
  - Notes
  - Organization
  - Organization Group

Monation in Contract Contract



- Children
  - Activity
  - Contact
  - Engagement scoring
  - Fields
  - Notes
  - Organization
  - Organization Group
  - Registration

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- Children
  - Activity
  - Contact
  - Engagement scoring
  - Fields
  - Notes
  - Organization
  - Organization Group
  - Registration
  - RedHen Relation





- Aunts and Uncles
  - RedHen Membership





- Aunts and Uncles
  - RedHen Membership
  - Entity Registration





- Aunts and Uncles
  - RedHen Membership
  - Entity Registration
  - Sales Force CRM Suite (7.x-3.x)





- Aunts and Uncles
  - RedHen Membership
  - Entity Registration
  - Sales Force CRM Suite (7.x-3.x)
  - Mail Chip





- Aunts and Uncles
  - RedHen Membership
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  - Mandrill





- Aunts and Uncles
  - RedHen Membership
  - Entity Registration
  - Sales Force CRM Suite (7.x-3.x)
  - Mail Chip
  - Mandrill
  - Poultry Theme





- Aunts and Uncles
  - RedHen Membership
  - Entity Registration
  - Sales Force CRM Suite (7.x-3.x)
  - Mail Chip
  - Mandrill
  - Poultry Theme
  - RedHen Demo



- 1st Cousins
  - Relation



- 1st Cousins
  - Relation
  - View



- 1st Cousins
  - Relation
  - View
  - Rules





- 1st Cousins
  - Relation
  - View
  - Rules
  - Debut Redhen





- 1st Cousins
  - Relation
  - View
  - Rules
  - Debut Redhen
  - Drupal Commerce

- Distant relatives
  - Webform
  - Other field modules
  - Other Entity base modules









- The RedHen family is quite large
  - Children
  - Aunts and Uncles
  - 1st Cousins
  - Distant relatives

RedHen module and it's children

thorness continguapties, continues to the continues to th



- Children
  - Contact
  - Fields
  - Notes
  - Organization
  - Organization Group
  - RedHen Relation

# **Drupal Concepts**



Entity types > Bundles > Fields > Entities.

- Entity types (foundation)
  - Content, User, Taxonomy, Comments

- Bundles A subset or a type of "Entity Types"
  - Basic page, article, events

# **Drupal Concepts**



Entity types > Bundles > Fields > Entities.

- Fields
  - Name, Address, City, State, etc.
- Entity
  - A single "instance" of a particular entity type of bundle.
  - A single article, contact, user, comment.

# **Drupal Concepts**



- Object-Oriented Terms
  - An entity type is a base class
  - A bundle is an extended class
  - A field is a class member, property, variable or field instance
  - An entity is an object or instance of a base or extended class





- Two main entity types:
  - Organizations
  - Contacts

- Site builders can create different bundles
- Each bundle is "fieldable".





- Two main entity types:
  - Organizations
  - Contacts

Site builders can create different bundles

Each bundle is "fieldable".





 Connections are managed from the contact entity edit screen.

 Optionally, contact entities can be associated with Drupal user accounts.

 Or a new Drupal user account can be created from the contact entity edit form





- Connections can be between
  - Contacts
  - Contacts and organizations
  - Organizations
  - Contacts

- Connections are relation entity type
  - As such, the connection is "fieldable".





RedHen Notes – is an entity type

The RedHen Note entity is "fieldable".

 Integrates with the "RedHen Engagement Scoring".





 RedHen Groups – light weight version of Organic groups.

Provides private node content for each organization.





- Memberships
  - Another custom entity type
  - Defined by the RedHen Membership module

### RedHen Demo





Was going to configure Drupal Association

Examine the RedHen Demo Distriubtion

- Drupal.org/project/redhen\_demo
  - Create database
  - Download and install distribution





- Create a database called redhen
- Download and install drupal
- Download & enable additional modules
- Download Zen & Poultry theme (optional)
  - Set Poultry to default theme
  - Disable Bartik them





Download Zen & Poultry theme (optional)



#### Bartik 7.19 (default theme)

A flexible, recolorable theme with many regions.

Settings

#### Disabled themes



#### Garland 7.19

A multi-column theme which can be configured to modify colors and switch between fixed and fluid width layouts.

Enable Enable and set default



#### poultry 7.x-1.0-beta1+7-dev

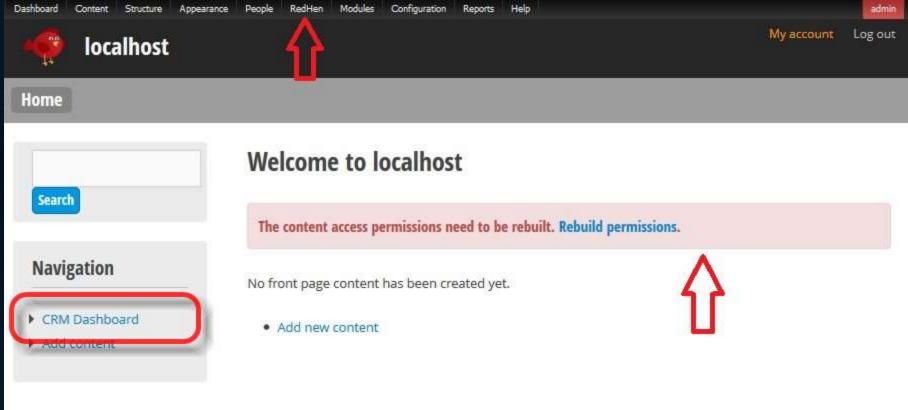
Read the online docs or the included README.txt on how to create a theme with Zen.

Enable Enable and set default

Powered by Drupal







# RedHen Settings





### **CRM Dashboard**

RedHen CRM is an open source CRM framework built natively in Drupal. RedHen CRM is packed with association management (AMS) features for managing detailed information on contacts and organizations, membership services, event registrations, and constituent engagement.

#### Contacts

View, manage, and search contacts.

#### Organizations

View, manage, and search organizations.

#### Activity

RedHen activity stream.

#### Structure

Define bundles and manage fields for RedHen entities.

#### Settings

RedHen configuration and settings.



# RedHen - Settings





### **RedHen CRM settings**

RedHen CRM settings.

#### ✓ Connect users to Redhen contacts

If checked, Redhen will attempt to connect Drupal users to Redhen contacts by matching email addresses when a contact is updated.

#### Mirror RedHen Contact email to Drupal user

If checked, RedHen will mirror the primary email of a RedHen Contact with the email of the linked user account. The email field on the Drupal user form will also be disabled.

#### Automatically enable memberships on their Start date

If checked, RedHen will set Inactive memberships to Active on their Start date during cron runs.

#### Automatically expire memberships on their Expiration date

If checked, RedHen will set Active memberships to Expired on their Expiration date during cron runs.

Save configuration

### RedHen - Structure





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### RedHen Structures

Home » Administration » Structure

RedHen CRM o

- Contact types
  - Manage contact entity types, including adding and removing fields and the display of fields.
- Engagement Scores

Manage Engagement Scores.

Notes

Manage RedHen notes

Organization types

Manage organization entity types, including adding and removing fields and the display of fields.





RedHen – Contact type

Home » Administration » Structure » RedHen CRM

Contact types o

+ Add contact type + Import contact type

LABEL	STATUS	OPERATIONS						
Volunteer (Machine name: volunteer)	Custom	edit	manage fields	manage display	clone	delete	export	
Staff (Machine name: staff)	Custom	edit	manage fields	manage display	clone	delete	export	

Volunteer





RedHen – Contact type

### EDIT MANAGE FIELDS MANAGE DISPLAY

Show row weights

Label	ı	Machine name	Field type Widget		Operations	
÷ C	ontact name	name	Contact name			
<b>⊕</b> E	mail	redhen_contact_email	RedHen Email	Email field	edit	delete
<b>⊕</b> A	ddress	field_address	Postal address	Dynamic address form	edit	delete
<b>⊕</b> A	vailability	field_availability	Text	Text field	edit	delete
	add new field		- Select a field type - ▼  Type of data to store.	- Select a widget -  Form element to edit the data	l.	





RedHen Engagement Scores

Home » Administration » Structure » RedHen CRM

Engagement Scores o

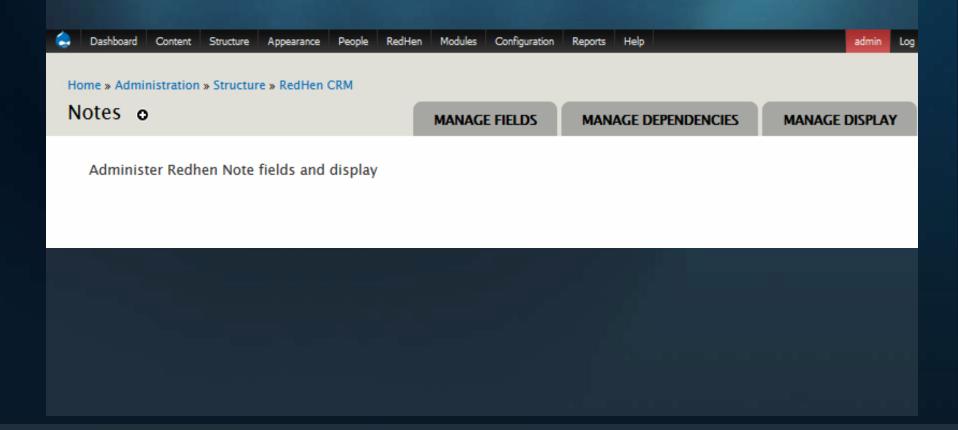
#### + Add engagement score + Import engagement score

LABEL	SCORE	STATUS	OPERATIONS				
Low points (Machine name: low_points)	5	Custom	edit	clone	delete	export	
Medium (Machine name: medium)	10	Custom	edit	clone	delete	export	
Big points (Machine name: big_points)	20	Custom	edit	clone	delete	export	





RedHen – Notes







RedHen – Organization Types

Home > Administration > Structure > RedHen CRM >

### **Organization types**

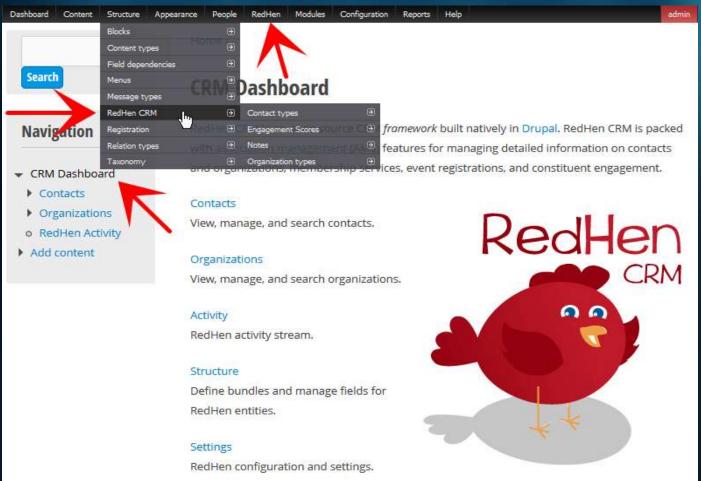
Add organization type

Import organization type

Label	Status	Operations						
Foundation (Machine name: foundation)	Default	edit	manage fields	manage display	clone	export		
Shelter (Machine name: shelter)	Default	edit	manage fields	manage display	clone	export		







### RedHen - Contact



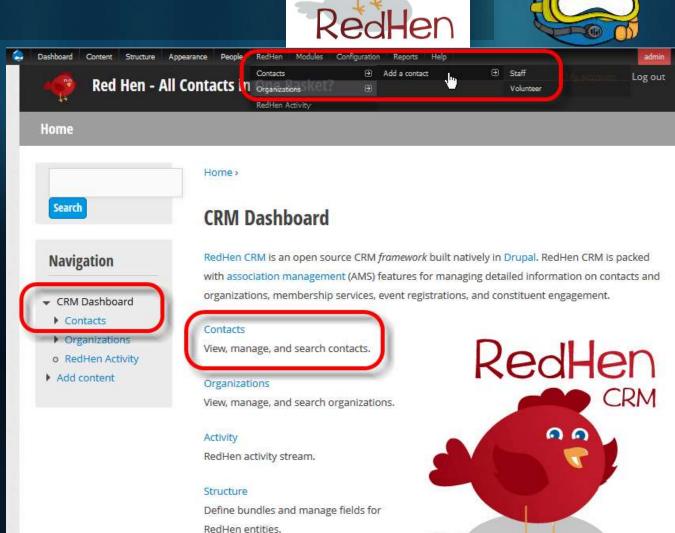








Add a Contact







Add a Contact

Home > CRM Dashboard >

#### **Contacts**





This brings you to a new page where you specify you type of contact.

Filters



This expands to ask for First Name, Last Name, State, Contact Type

Type First Name		Last Name	Email	Updated	Actions
Staff	Dennis Solis		densolis@aol.com	Today at 1:12pm	edit   delete
Volunteer	Bill	Brown	bill@example.com	Today at 1:03pm	edit   delete





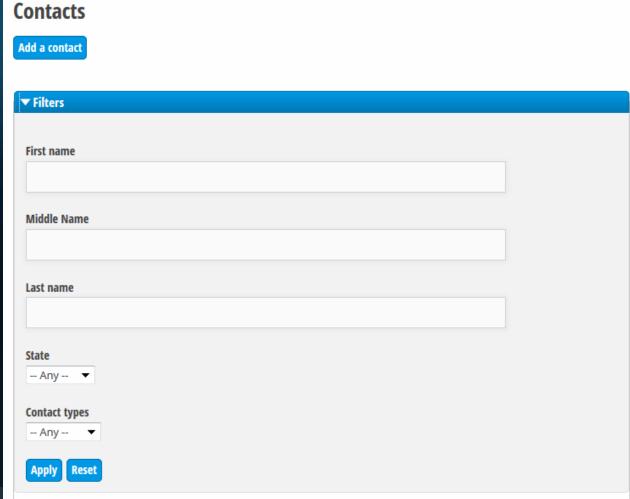
Add a Contact







Contact Filter

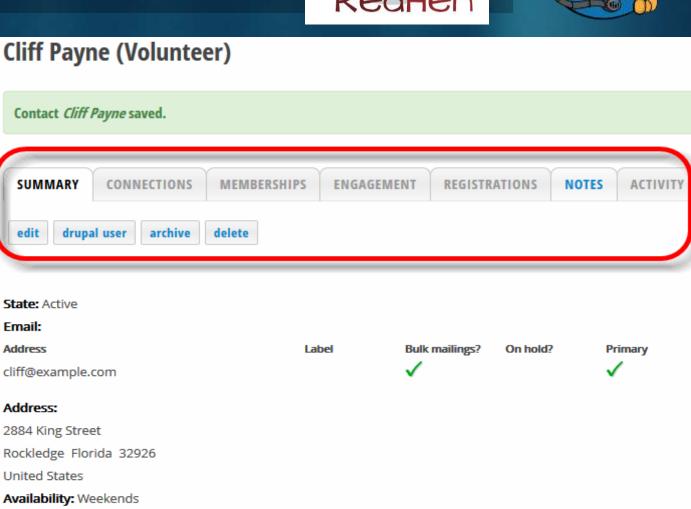






View a Contact

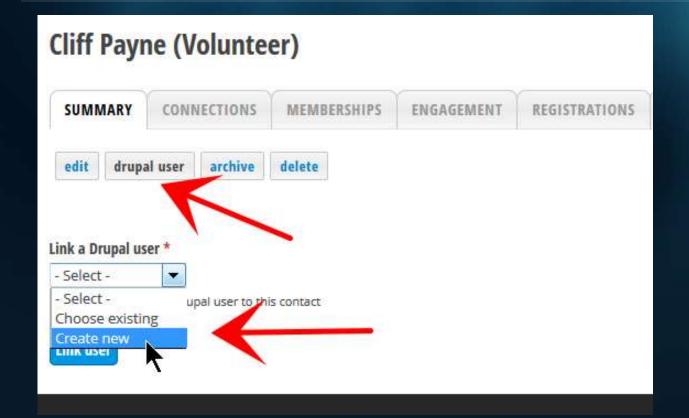
Connect to a Drupal User Account







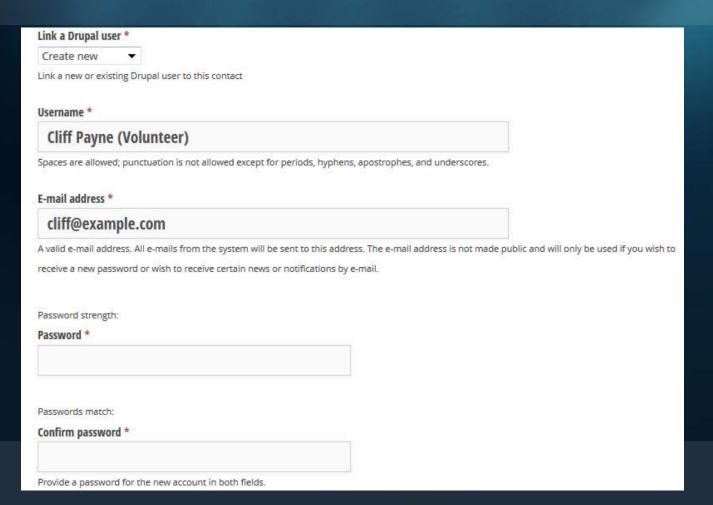
Connect contact to user







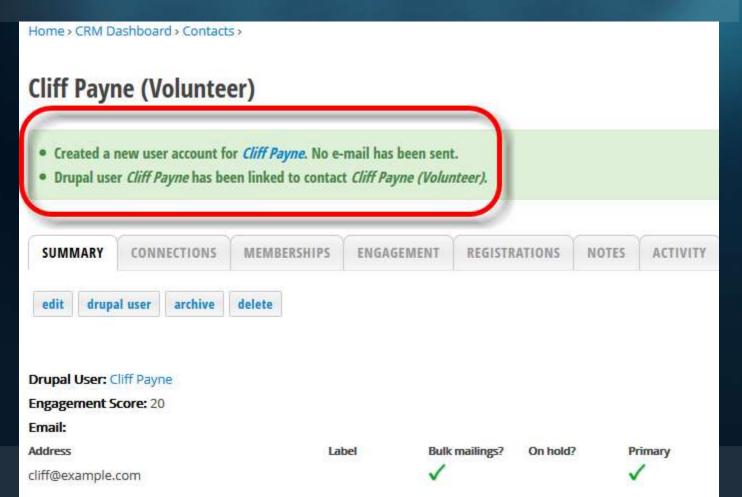
### Connect contact to user







Connect contact to user







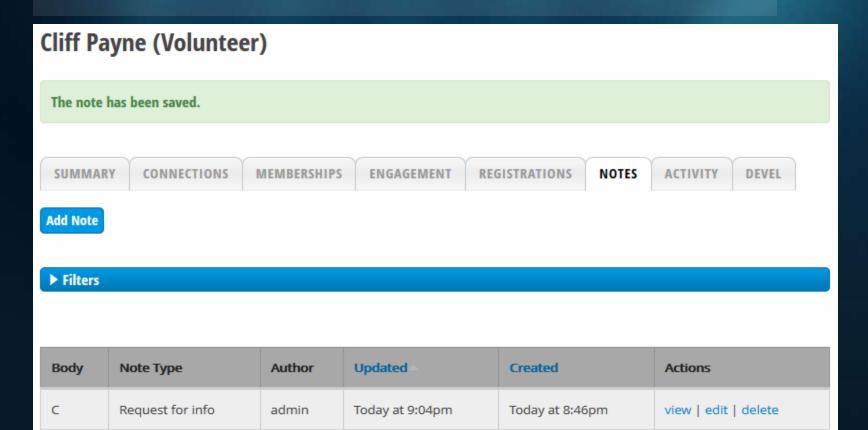
Add a Note

Note 1 on Cliff Payne (Volunteer)								
edit delete								
Message								
Cliff called and said he would come by and walks some dogs this weekend (April 20th, 2013).								
	.:							
	.::							
Туре								
Request for info ▼								
Engagement Score								
High-value engagement ▼								
The selected engagement score if any will be applied to the contact when creating this note								





View notes for a contact







View engagements for a contact

Home > CRM Dashboard > Contacts > Cliff Payne (Volunteer) >

### **Cliff Payne (Volunteer)**

SUMMARY CONNECTIONS MEMBERSHIPS ENGAGEMENT REGISTRATIONS NOTES ACTIVITY DEVEL

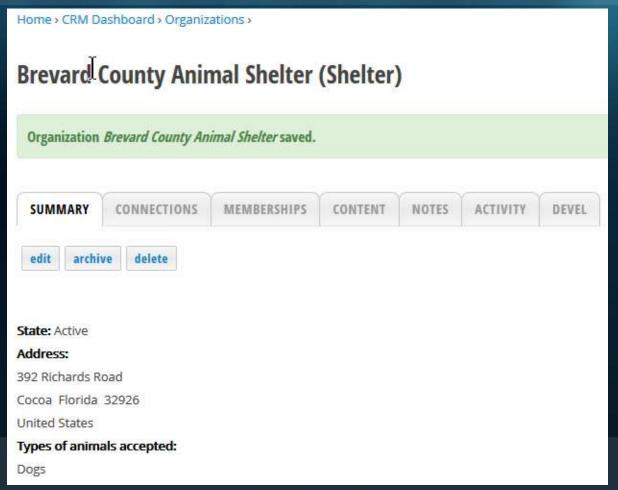
**▶** Filters

Score	Туре	Created	Description	Source	Author
10	High-value engagement	Today at 9:04pm	Created when saving note 1	Note 1 on Cliff Payne (Volunteer)	admin
10	High-value engagement	Today at 8:46pm	Created when saving note 1	Note 1 on Cliff Payne (Volunteer)	admin





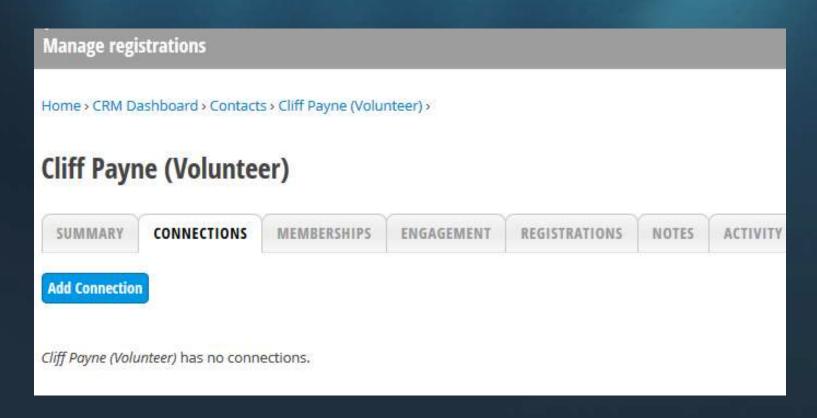
Adding Organization







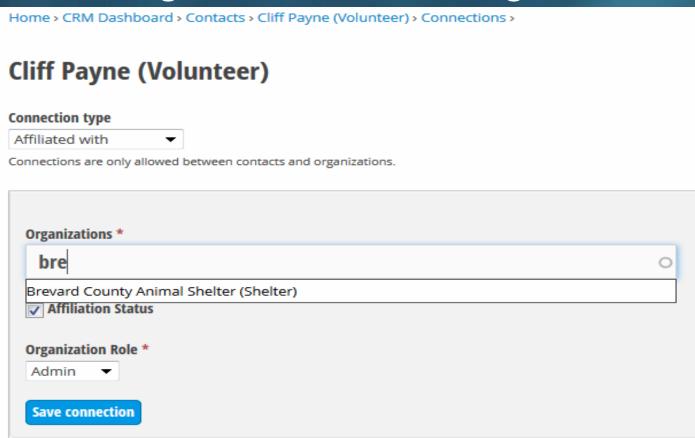
Connecting Contacts and Organizations







Connecting Contacts and Organizations







View contact's connections

# Cliff Payne (Volunteer) The connection has been saved.

SUMMARY CO

CONNECTIONS

**MEMBERSHIPS** 

**ENGAGEMENT** 

REGISTRATIONS

NOTES

**ACTIVITY** 

DEVEL

**Add Connection** 

Connection	Туре	Name	Status	Created	Author	Actions
Organizational affiliation	Organization	Brevard County Animal Shelter (Shelter)	Active	04/19/2013	admin	edit   delete





Managing primary contact for organization

Home > CRM Dashboard >

### **Organizations**

Add an organization

#### **▶** Filters

Туре	Name	Updated	Actions
Shelter	Brevard County Animal Shelter	Today at 9:42pm	edit   delete





Managing primary contact for organization

Home > CRM Dashboard > Organizations > Brevard County Animal Shelter (Shelter) > Ped Han

### **Brevard County Animal Shelter (Shelter)**

SUMMARY CONNECTIONS MEMBERSHIPS CONTENT NOTES ACTIVITY DEVEL

**Add Connection** 

Connection	Туре	Name	Status	Created	Author	Actions	Primary contact
Organizational affiliation	Contact	Cliff Payne (Volunteer)	Active	04/19/2013	admin	edit   delete	set as primary
Organizational affiliation	Contact	Amy Paulin (Staff)	Active	04/19/2013	admin	edit   delete	set as primary





Managing primary contact for organization

Home > CRM Dashboard > Organizations > Brevard County Animal Shelter (Shelter) >

### **Brevard County Animal Shelter (Shelter)**

SUMMARY CONNECTIONS MEMBERSHIPS CONTENT NOTES ACTIVITY DEVEL

**Add Connection** 

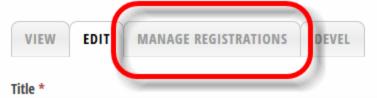
Connection Type		Name	Status	Created	Author	Actions	Primary contact
Organizational affiliation	Contact	Cliff Payne (Volunteer)	Active	04/19/2013	admin	edit   delete	set as primary
Organizational affiliation	Contact	Amy Paulin (Staff)	Active	04/19/2013	admin	edit   delete	Primary





Adding Events (Content type)

### **Edit Event American Kennel Club - Orlando Dog Show**



American Kennel Club - Orlando Dog Show

#### **Body (Edit summary)**

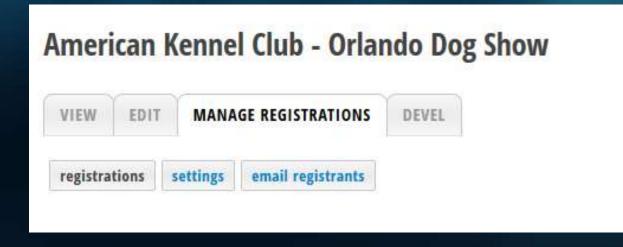
Wednesday, April 03, 2013]

New York, NY (April 2, 2013) — Move over college basketball, the dog sport world now has the "Final Five." This December, the competitive year will culminate with five events in Orlando, Florida. The week's highlights are three all-breed dog shows, a day of independent specialties and special attractions, and the AKC/Eukanuba National Championship. These premiere events will be held on December 10-15, 2013 at the Orange County Convention Center in Orlando, Florida.





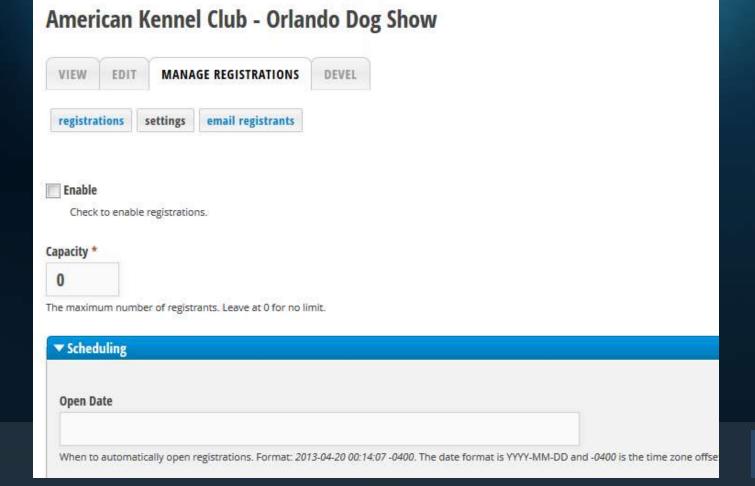
Manage Registration







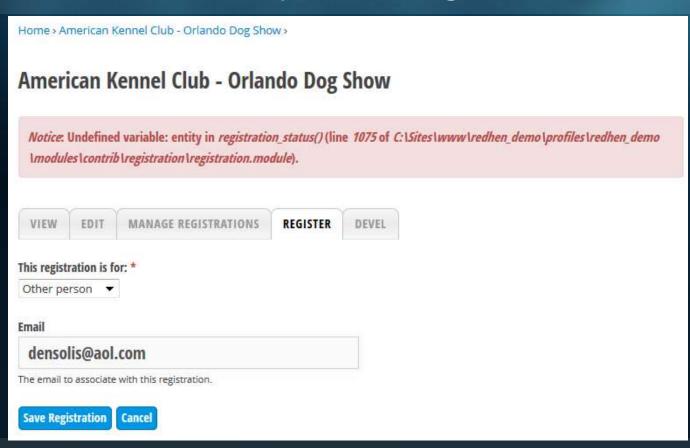
Manage Registration - Settings







Event Content Type - Register







Event Content Type – Manage Registration

Home > American Kennel Club - Orlando Dog Show >

### American Kennel Club - Orlando Dog Show

VIEW	EDIT	MANA	GE REGISTRATIONS	REGISTER	DEVEL
registrat	tions	settings	email registrants		

List of registrations for American Kennel Club - Orlando Dog Show. 3 of 10 slots are filled.

id	Email	User	Created By	Count	Created	State	Actions
3	amy@example.com	Amy Paulin	admin	1	Sat, 04/20/2013 - 00:42	Complete	View   Edit   Delete
2	densolis@aol.com		admin	1	Sat, 04/20/2013 - 00:30	Complete	View   Edit   Delete
1	cliff@example.com		admin	1	Sat, 04/20/2013 - 00:25	Complete	View   Edit   Delete





Contact - Registration

Home > CRM Dashboard > Contacts > Amy Paulin (Staff) >

### **Amy Paulin (Staff)**

SUMMARY	CONNECTIONS	MEMBERSHIPS	ENGAGEMENT	REGISTRATIONS	NOTES	ACTIVITY	DEVEL

Туре	Parent Entity	Author	Email	Count	Updated	Actions
Standard registration	American Kennel Club - Orlando Dog Show	admin		1	Today at 12:42am	view   edit   delete





- RedHen Membership
  - Manage Drupal user roles via organizational memberships.
  - "Active" member on effective date
  - "Expire" member on expiration date



## What Did You Think?

Please Evaluate this session at: fldrupalcamp.org/program/schedule