Better Living through Extensions



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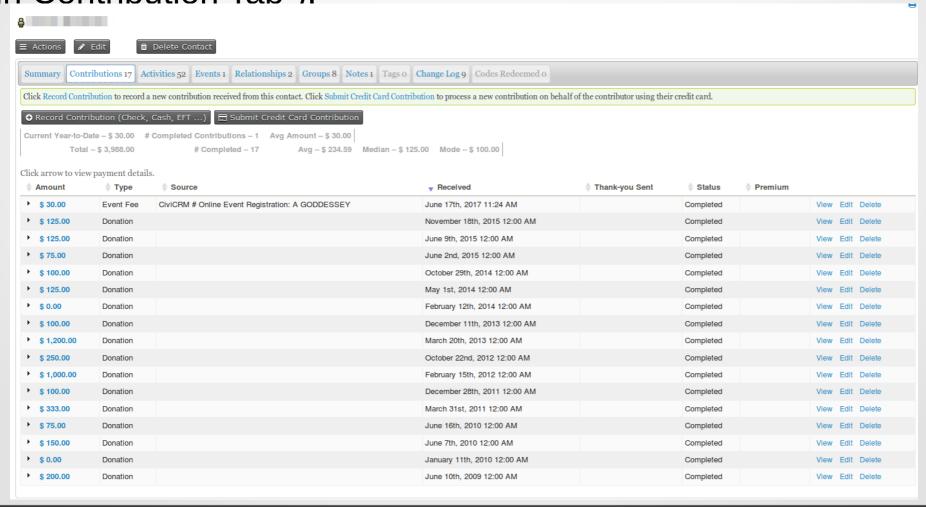
Megaphone Technology Consulting

What are we covering here?

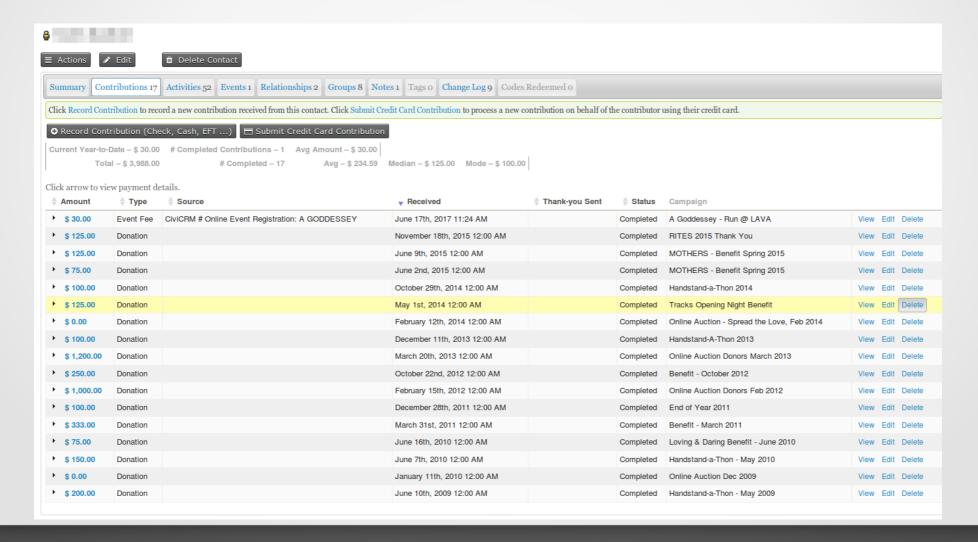
- •A NON-technical discussion of extensions.
- •A tour of the public, private, semi-private and core extension ecosystems.
- •A peek into the future of extensions.
- I'm keeping this short lots of Q&A time.

- It's a way to add (or remove!) functionality from CiviCRM.
- It can be literally anything. Some examples:
 - "This report in CiviCRM almost meets my needs, but I need to add new fields."
 - "If the person making a donation is a major donor, show them a different set of donation options."
 - "I want to use a new payment processor, but it's not built in to CiviCRM."
 - "I want to automatically look up and contact someone's elected officials when they fill out a petition."

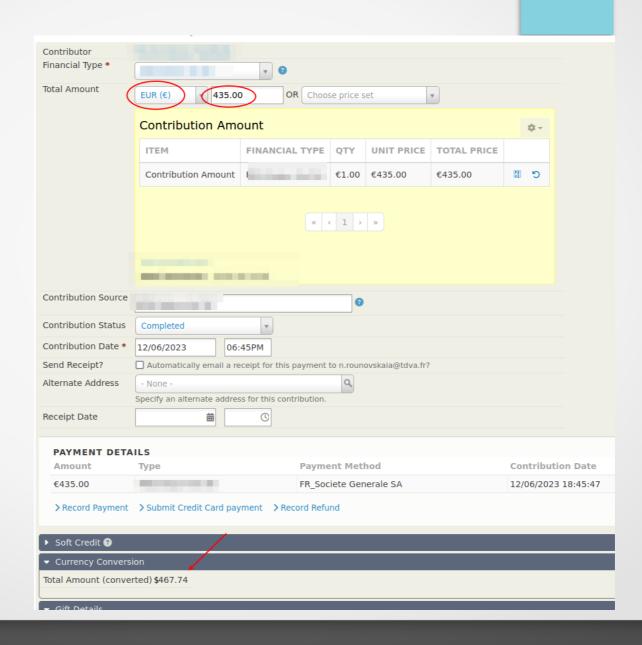
They can use information stored in CiviCRM (e.g. "Campaign in Contribution Tab").



With extension applied:



They can use outside info (e.g. "Currency Converter").



The extension ecosystems

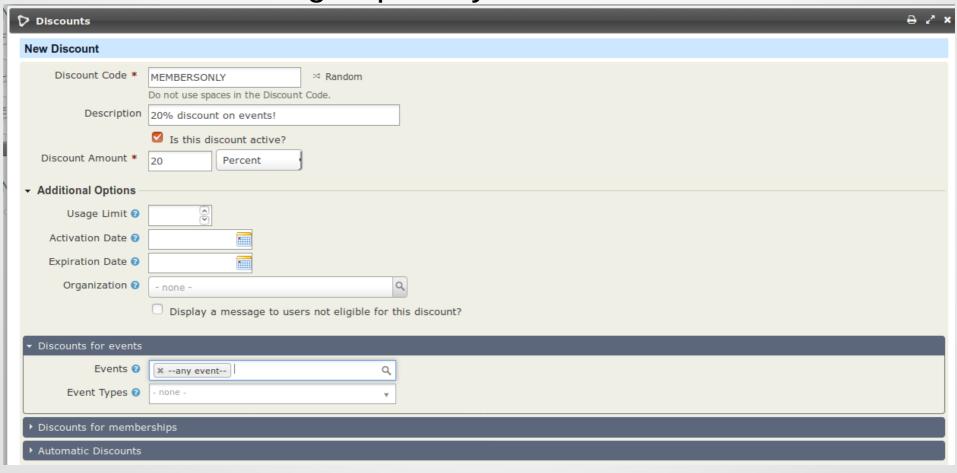
Public, private, semi-private, and core extensions exist. They all have their own ecosystem. Let's tour each.

Public extensions

- Someone has solved a common problem, and they want to share it with the world!
- Some (not all) public extensions can be browsed and installed directly from within CiviCRM.
- Let's do a whirlwind tour of the most popular public extensions, because you might want one of these right away.

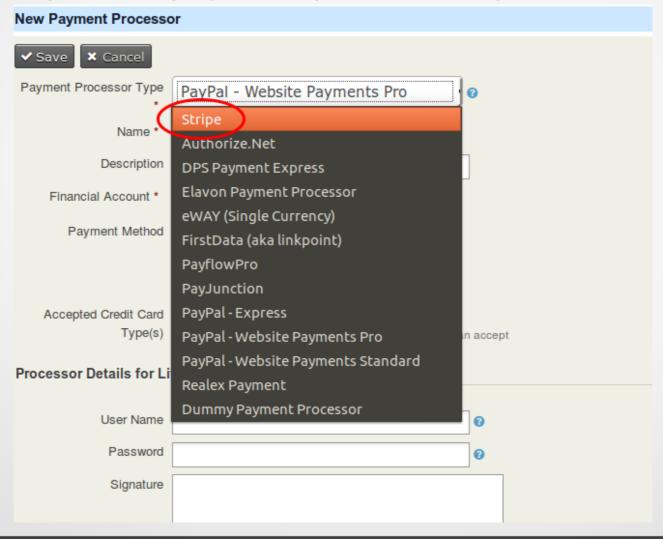
CiviDiscount

Discount codes, coupons, automatic discounts for logged-in users based on the groups they're in.



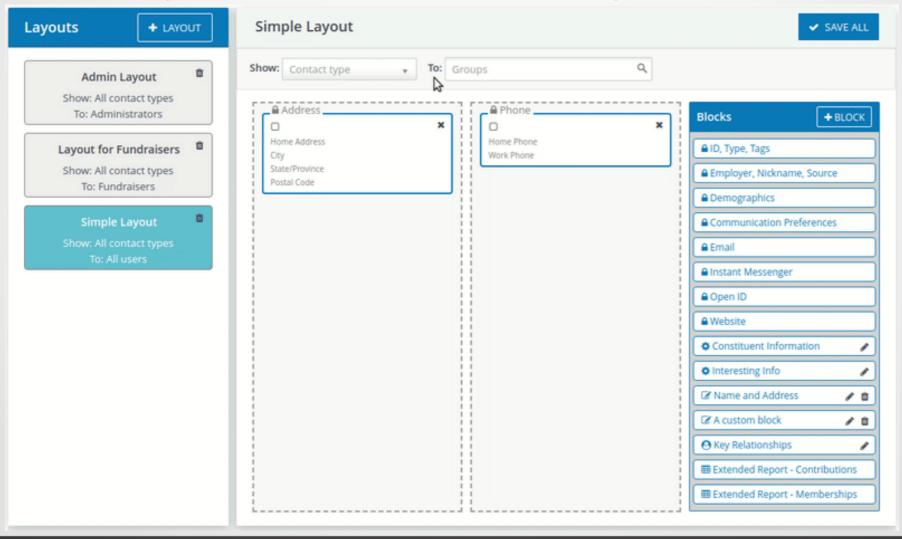
Stripe

Adds Stripe as a payment processor option to Civi.



Contact Layout Editor

Custom layouts for the contact summary tab.



And more...

- Mosaico a drag and drop email template builder, similar to Mailchimp.
- •Multisite: For organizations with branches or chapters that are autonomous from each other they can all get their own CiviCRM, but the head office sees all the data together.

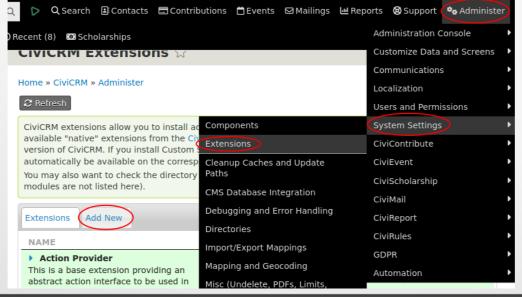
A special mention to "No Overwrite"

Have you (or your staff) ever entered a donation for someone else through the public page while logged in? Did your record and the donor's record get mushed together? "No Overwrite" is the extension for you!

More public extensions!

- •That was just a few of the public extensions. There are over 140 for public distribution, and hundreds in the directory go browse!
- Those that are approved for automated distribution are available from within CiviCRM.

There's plenty more at https://civicrm.org/extensions!

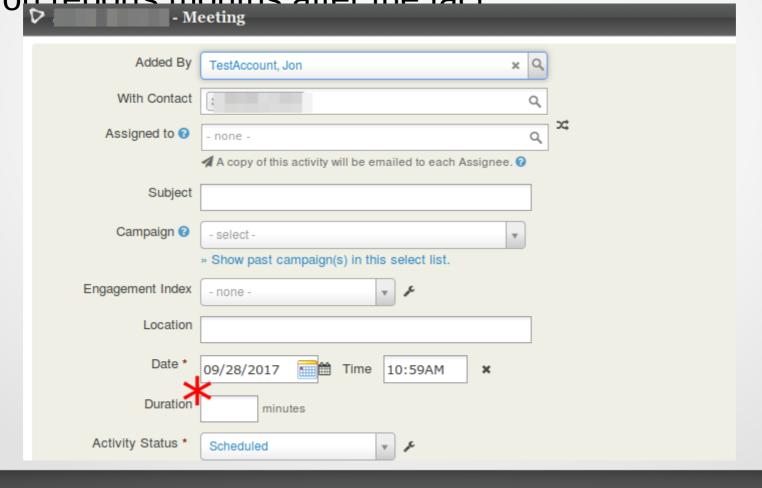


Private Extensions

- Sometimes, you have a need that's specific to your organization.
- You can hire someone to write an extension to solve it for you.
- Private extensions don't need the polish of public extensions so they can be quick and cheap. Useful extensions can be written in as little as 20 minutes!

Required Duration

"Required Duration" extension – 4 lines of code makes this field required. A 20 minute extension saved hours of fixing data on reports months after the fact



Private extensions

- Private extensions are a great way to get something that works 98% out of the box to 100% functional.
- •Unfortunately, you need to be a programmer to write them.
- Find extension developers at https://civicrm.org/providers (filter "Services" to "Custom code and extensions").
- Fewer customizations need extensions today, thanks to a new generation of extra-versatile extensions (more later).

Semi-private extensions

- Adding extensions to the directory is easy now, but used to be more work.
- Sometimes, we don't want to do the work to make something generally usable.
- So many (most?) extensions are never published!
- However, you can find them on Github and Gitlab. Let's take a look.

Github users with semi-private extensions

- https://github.com/totten
- <u>https://github.com/TechToThePeople</u>
- https://github.com/veda-consulting
- <u>https://github.com/MegaphoneJon</u> (me!)
- https://github.com/CiviCooP
- https://github.com/JMAConsulting
- https://github.com/eileenmcnaughton
- ...and more!

Installing semi-private extensions

- I'm not going to cover this in depth it IS technical.
 - Find your Extensions directory (Administer menu »
 System Settings » Directories)
 - Download the extension's zip file from Github.
 - Unzip the extension and upload it to your server in the extension directory.
 - Go to Administer menu » Extensions and press "Refresh". You should see the new extension.

Core extensions

- Core functionality split into extensions. For two reasons:
 - Adding next-generation functionality while allowing slower-moving organizations to keep their old setups.
 - "Admin UI" and "Search UI" are good examples you can replace core Civi screens with SearchKit-powered versions.
 - Moving little-used functionality out of the core.
 - This prevents a bug in, e.g., CiviGrants from affecting non-CiviGrants users

When is an extension not an extension?

- There are other ways to customize CiviCRM. Many are "old" approaches from before extensions were possible.
- However, you can also extend CiviCRM in a CMS-specific way (WordPress plugin, a Drupal/Backdrop module, a Joomla extension).
- Don't do this unless you're doing something specific to that CMS!
- However, some of the very coolest features of Civi are CMS integration plugins, like "Webform CiviCRM" or "Views Integration" or "WooCommerce CiviCRM".

Especially versatile extensions

- CiviRules take custom actions based on interactions with Civi.
- SearchKit a core extension that replaces the need for many custom reports
- SearchKit Tokens Use SK instead of token extensions.
- Honorable mention: Advanced Import, Form Processor, Data Processor

CiviRules

- CiviRules is a special extension. It's a sort of no-coding extension builder. It lets you create new actions in CiviCRM that used to require their own extension.
- •This is NOT a non-technical extension but it lowers the barrier. If you understand CiviCRM but not coding, you can build rules.
 - E.g. "Whenever someone donates \$500 or more, send an email to the Director of Development".
- •While it can only do a small fraction of the things a full extension can do, it can do many of the most common things you need without any coding.
- CiviRules is designed for moves management (aka "donor journeys", "sales funnel", "engagement ladder", etc.). Good