



# Integration With Drupal

Harnessing the beast and getting Civi to  
"play nice" with your pet Drupal

Presented by: Stooob and ColemanW

# What is it?

- [CiviCRM](#) is open source Contact Resource Management for non-for-profits, government and civics, including the Drupal Association
- A behemoth that integrates with Drupal as well as WordPress and Joomla!
- A web app that handles donations, memberships, events, bulk mail, and more

# What do I need to know?

- CiviCRM masquerades as a Drupal module but is bigger than Drupal core
- CiviCRM needs its own database, and your Drupal dB user needs access to the Civi dB
- You need to [read the documentation](#) before you install it. No, seriously.
- CiviCRM has specific [hosting requirements](#)

# How is CiviCRM unlike a website?

- Civi is not a website and needs a CMS to function
- Civi opens up a new world for most developers: massive real-time data management
- Civi gets more daily staff use than a site
- Steep learning curve of its own

# Different Purposes, Philosophies

- Drupal is a toolkit where you can "build it yourself" but doesn't do much out of the box.
- CiviCRM does *everything* out of the box.

CiviEvent

CiviContribute

CiviPledge

CiviMember

CiviCase

CiviMail

CiviGrant

CiviReport

CiviCampaign



Are all part of CiviCRM core.

# The elephant in the room

- Please realize comparing CiviCRM's codebase to Drupal core is like apples & a truckload of oranges
- CiviCRM's code base is ***larger*** than Drupal core, with 1% of the user base
- CiviCRM has introduced coding standards modeled off Drupal, draws inspiration from Drupal, and integrates best with Drupal

# Can I do it?

Like a bike that arrives in a box, it requires some know-how, some patience, or maybe a little of both.

<http://book.civicrm.org>



Photo: Nat Tarbox

# Ways to integrate

1. CiviCRM data fields can appear in the /user My Account pages via CiviCRM's "Profiles"
2. CiviCRM integrates with [Views](#), showing Civi dB data in blocks and pages
3. CiviCRM syncs Drupal Users to CiviCRM contacts, matching on email or other criteria
4. CiviCRM Groups can sync with Roles



# Ways to integrate

5. CiviCRM Memberships can sync with Roles
6. Modules exist to link [Commerce](#) and [Ubercart](#) with CiviCRM
7. CiviCRM contacts, events, relationships and activities can integrate with the [Webform Module](#)
8. Use the CiviCRM [API](#) and [hooks](#)

# 1. Profiles

Home > demo > Edit

demo View Edit

Account Name and Address

**Name and Address**

First Name \*

Last Name \*

Street Address (Home)

City (Home)

Postal Code (Home)

Country (Home)

State (Home)

What's Your Favorite Color?  Blue  No, yellow...arrrrgh!

Custom Field 1

This is the "My Account" section of a basic Drupal site.

CiviCRM fields are being used here, and show as a separate tab when editing your account.

Some fields are required.\*

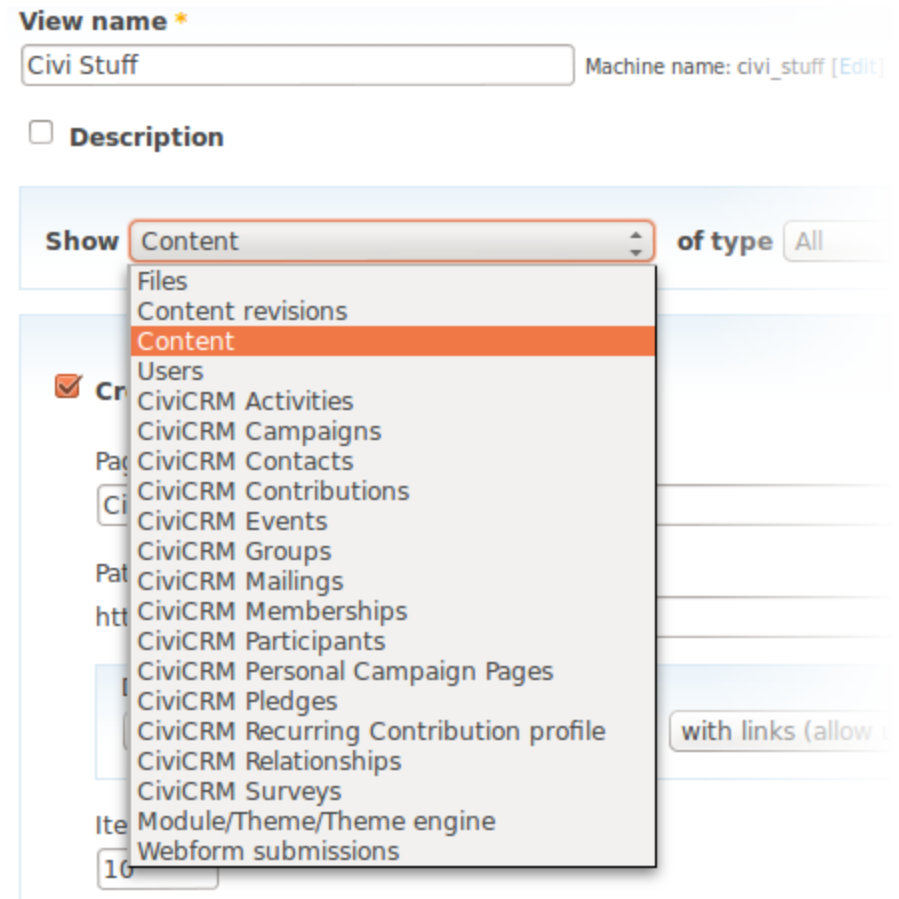
There are also custom fields of your own making.

## 2. Views Integration

You can create views of just about any objects in CiviCRM

Most relationships are supported

Mixed views of Drupal/Civi content is not so easy



The screenshot shows the 'View name' field set to 'Civi Stuff' with a machine name of 'civi\_stuff'. Below it is a 'Description' checkbox. The 'Show' dropdown menu is open, displaying a list of content types including 'Content', 'Files', 'Content revisions', 'Users', and various CiviCRM entities like 'Activities', 'Campaigns', 'Contacts', 'Contributions', 'Events', 'Groups', 'Mailings', 'Memberships', 'Participants', 'Personal Campaign Pages', 'Pledges', 'Recurring Contribution profile', 'Relationships', 'Surveys', 'Module/Theme/Theme engine', and 'Webform submissions'. The 'Content' option is highlighted in orange. To the right of the dropdown is a 'of type' field set to 'All'. At the bottom right, there is a 'with links (allow)' button.

Read the [docs!](#)

## 2. Views: In Action

### Consulting Services

Acoustical Services ▲  
 Air Quality Specialists  
 Commissioning/Retro-Commissioning  
 Computer Software  
 Consulting Services  
 Educational Services  
 Energy Services  
 Facility Planning  
 Financial Consulting  
 Green Consulting  
 Professional Landscaping Services  
 Legal Services  
 Lighting/Daylighting  
 Maintenance Supplies and Services  
 Modular/Prefabricated Classroom ▼

### Non-profit 501(c)(3) Organizations

Educational ▲  
 Environmental  
 Health  
 Other 501(c)(3) ▼

### Other Non-profit Organizations

Professional Society ▲  
 Trade Association  
 Other Nonprofit ▼

### City

### ZIP Code

### Government Agencies

Educational ▲  
 Energy  
 Environmental  
 School Construction  
 School Funding ▼

### Utility Companies

Utility Company ▲  
 ▼

### State / Province

- Any - ▼

### Member Name



Member	City	State	Website
3QC, Inc.	Folsom	California	<a href="http://www.3QCinc.com">http://www.3QCinc.com</a>
AEDIS Architecture & Planning	San Jose	California	<a href="http://www.aedisgroup.com">http://www.aedisgroup.com</a>
Ai3 Architects, LLC	Wayland	Massachusetts	<a href="http://www.ai3architects.com">http://www.ai3architects.com</a>
Akzo Nobel Decorative Coatings NA (ICI Paints)	Strongsville	Ohio	<a href="http://www.akzonobel.com">http://www.akzonobel.com</a>
American Federation of Teachers	Washington	District of Columbia	<a href="http://www.aft.org">http://www.aft.org</a>
American Modular Systems	Manteca	California	<a href="http://www.americanmodular.com">http://www.americanmodular.com</a>
ANOVA NEXUS Architects	Placerville	California	<a href="http://www.anovaarchitects.com">http://www.anovaarchitects.com</a>

## 3. Drupal User to Contact 'Sync'

- Each time a User is saved or updated, CiviCRM attempts to match that User to an existing Contact using email
- Your matching 'rule' can be altered to match on other fields like first name, if you use Profiles (see #1) to include these fields
- If your Users and Contacts get out of sync, you can reset and run the sync again

## 4. CiviCRM Groups to Drupal Roles

- CiviCRM has many ways to organize Contacts. Groups is probably the best way
- Adding a Contact to a Group can also place them in a corresponding Drupal Role
- *And vice versa...*
- **Sync happens each time a User logs in**

# 5. CiviCRM Memberships to Drupal Roles

- Memberships have a type, a 'member since' date, a start date, and an end date
- Status is updated automatically via Civi cron: current and expired status are required. Grace & new can also be useful
- Civi Memberships can be 'passed along' via relationship. i.e. employees and family members

# 5. CiviCRM Memberships to Drupal Roles

- A certain Membership status can grant a certain Drupal role(s)
- **Example:** Current "Regular" members get the "Member" Role. Current "Platinum" members get the "Member" Role *and* the "VIP" Role
- Sync occurs: login/logout **OR** when Drupal cron runs **OR** when membership updates



## 6. Commerce and Ubercart

- Integration modules "build a bridge" between Commerce and CiviCRM or Ubercart and Civi
- These modules should be explored fully with zero assumptions. They may have beta functionality

# 7. Webform Integration

- A mature, feature-rich module to glue CiviCRM and Webform apis

VIEW EDIT WEBFORM RESULTS CIVICRM

Form components E-mails Form settings Form validation

LABEL	TYPE	VALUE	MANDATORY	OPERATIONS
+ Employee	Contact 1 Fieldset	-		Edit Clone Contact Delete
+ Existing Contact	Contact - Hidden	Current User	<input type="checkbox"/>	Edit Clone Delete
+ First Name	Textfield	-	<input type="checkbox"/>	Edit Clone Delete
+ Last Name	Textfield	-	<input type="checkbox"/>	Edit Clone Delete
+ Email	E-mail	-	<input type="checkbox"/>	Edit Clone Delete
+ Activity Subject	Textfield	-	<input type="checkbox"/>	Edit Clone Delete
+ Employer	Contact 2 Fieldset	-		Edit Clone Contact Delete
+ Search for your Employer	Contact - Autocomplete	Relationship to Contact 1	<input type="checkbox"/>	Edit Clone Delete
+ Organization Name	Textfield	-	<input type="checkbox"/>	Edit Clone Delete
+ Event Sign-up	Live options	Tester Conf	<input type="checkbox"/>	Edit Clone Delete
+ Registration Status	Static options	Registered	<input type="checkbox"/>	Edit Clone Delete
+ <input type="text" value="New component name"/>	Textfield		<input type="checkbox"/>	Add

Save

- The most flexible way to create & update CiviCRM data (moreso than CiviCRM itself)

# 7. What You Can Do With Webforms

- Create multiple contacts & relationships
- Find & update contacts via AJAX
- Multivalued custom data
- Activities & cases
- Register for events
- Groups and tags



Contact 3

Select Existing Contact

adams|

Mr Greg F Adams Jr

Mr Michael Y Adams

Rebecca V Adams

Bob Adamson-Smithy

+ Create new contact +

And it's a webform, so you can

- Use all of webform's features
- Plug in other modules

## 8. DIY - API

- Most CiviCRM data is accessible via [API](#)
- Callable from PHP, AJAX, SMARTY, REST, and DRUSH
- [API explorer](#) is an invaluable tool - try it!

## 8. DIY - HOOKS

- Almost every event in CiviCRM fires a hook
- Install devel and the civicrm\_developer modules for easy hook inspection
- Read more at <http://wiki.civicrm.org/confluence/display/CRMDOC43/Hook+Reference>

## 8. DIY - Tips

- Start with views and webform integration and see how far you can get without writing custom code.
- Before coding your own hook, explore CiviCRM rules integration and see if that does what you need.
- How you model your data is key - if you can't get it working, try e.g. tags instead of groups