

# Creating a shop using CiviCRM

A case study by



Every choice counts

# Who are Population Matters?

**We aim to raise awareness of the impact of ever-increasing human population on the planet**

**PM are a campaigning charity who advocate for:**

- Human rights (particularly female reproductive rights and education)
- Sustainability of resource use
- Protecting the environment



- We are a relatively small charity but have recently been growing our core team.
- We work closely with Third Sector Design who have helped us to modernise and introduce new processes using CiviCRM.
- Recently they helped create a shop using Civi to replace our previous Shopify account.



**Our vision is of a future in which our population co-exists in harmony with nature and prospers on a healthy planet, to the benefit of all.**

*“All our environmental problems become easier to solve with fewer people, and harder – and ultimately impossible – to solve with ever more people.”*



**Sir David Attenborough**  
Population Matters patron

# Population Matters shop

- As a campaigning charity it is important for any potential campaigners to be able to access and order our resources.
- Previously we paid to have a Shopify account. This was flawed though
- 3SD suggested we bring this process in house and allow supporters to make orders using Civi

## What were we hoping for?

- A smoother experience for supporters and better stewardship
- Stop paying a subscription (Shopify)
- Making orders easier for us to process
- Branding consistent with PMs themes
- A greater campaigning reach





# How to do this?

- Via our website (Wordpress) we want people to be able to fill in a form and indicate what they want.
- This form would then flow through to us via Civi for processing.
- To do this we used: formbuilder, user creation (profiles), custom activity type, Searchkit (dashlet)

# CAMPAIGN MATERIALS

Please help support our campaigns and spread the word that population matters by sharing our materials with friends, family and neighbours!

We deliver worldwide. Please allow 14 days for delivery within the UK and longer for overseas.

## OUR MATERIALS



### ● 'ATTENBOROUGH' LEAFLET

Our 4-page A5 leaflet featuring a quote from our patron Sir David Attenborough and setting out the case for population concern.



### ● BADGES

A 37 mm biodegradable badge with the Population Matters logo.



### ● BOOKMARKS

Our double-sided, attractive bookmark shows projected world population sizes and population increase over time, with a thought-provoking quote from Population Matters' patron Sir David Attenborough. The bookmark is 52 mm wide and 148 mm long.



### ● MEMBERSHIP FORM

A 2-page single A5 sheet, which enables people to sign up as a Population Matters member. When handing out our other leaflets, these forms can be placed inside them to help us raise funds.

## START CAMPAIGNING

Population is the driver behind so many global problems, but you can help us spread the word by ordering your own campaigning materials today!

[ORDER YOUR MATERIALS](#)

- People interested in campaign materials are taken to this basic Wordpress page
- Same theme as the rest of our site (unlike shopify).
- By clicking 'order your materials' they progress to the next page and the first part of the Civi process.



THE ISSUE

TAKE ACTION

ABOUT US

JOIN

DONATE



Campaigning for Population Matters is simple.

First, set up an account with a memorable username, which will enable you to place and track your orders for campaign materials.

### ABOUT YOU

FIRST NAME \*

Rpb

LAST NAME \*

Wadsworth

EMAIL \*

rob.wadsworth@populationmatters.org



✓ NEXT

Civi profiles

- The first step of the process is asking the supporter to set up an account. This was done using Civi profiles
- This gives us the ability to follow up with campaigners and also allows them to see what they have ordered. In addition to discouraging any illegitimate orders

## NEWSLETTER

Do you want to find out more about our important work? Sign up to our newsletter to keep up to date with all things population and consumption.

SIGN UP

# Form Builder

- Integrated into the web page is a form from Civi asking for details and the quantity of materials
- FormBuilder is easy for us to change/add to
- Remembers user details

## YOUR ORDER

### YOUR DETAILS

**FIRST NAME \***

**LAST NAME \***

**STREET ADDRESS \***

**TOWN/CITY \***

**COUNTY/STATE**

**COUNTRY \***

**POSTAL CODE \***

**MEMBERSHIP FORM**

A 2-page single A5 sheet which allows people to sign up as Population Matters members. When handing out our main leaflets, these forms can be placed inside them to help us raise funds.

Quantity

- The 'place order' part of the form creates an activity.
- This activity has been customised to indicate amounts and different options for each campaign item. This was done using custom fields on the 'Campaign order' activity.





Thank you for placing an order for our campaign materials, helping us to support our work for a sustainable future

A member of the team will be in touch if necessary but please allow 14 days for postage. If you have any questions in the meantime, contact Anthony Howarth via 020 3900 2553 or [anthony.howarth@populationmatters.org](mailto:anthony.howarth@populationmatters.org)

**DONATE TOWARDS MATERIALS AND POSTAGE**

If you would like to make a small donation to cover the cost of receiving your campaign materials we welcome you to do so. Every choice, and every gift, counts!

# End of the line

After completing the form the person is automatically directed to this screen which has info on following up and a request for a donation to cover costs.

- And, that's it! For them at least...

# Over to us

- The activity created in formbuilder is automatically listed as scheduled and assigned to Anthony, who will also receive an email.
- Another way of tracking is by using a dashlet created through searchkit.

### Mr Anthony Howarth - Campaign Shop Order

Added by	Wadsworth, Rob
With Contact	
Assigned to	Howarth, Anthony
Subject	Order received
Campaign	
Engagement Index	
Location	
Date	08/06/2023 1:58 PM
Duration	
Activity Status	Scheduled
Details	
Priority	Normal
Tags	

Campaign Materials

- Attenborough' Population Matters leaflet
- Badge
- Bookmark 1
- Membership form
- Small Families flyer

**✕ DONE**

Shop orders								🔄 ↗ ✕
Contact Name	(Date Only) Activity Date	Leaflets	Badges	Bookmarks	Forms	Flyers	Status	
Mr Rob Wadsworth	08/06/2023			1			Scheduled	

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## Final product and was it worth it?

- Streamlined process + instant notification.
- Allows better stewardship (malicious orders or personalised approach)
- Something we can widely share
- Ease of access for supporters and for us.
- Consistent branding and more traffic via website
- Easy changes and customisation.
- Cancelled Shopify account



# Thanks for listening!

Feel free to get in touch:

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Engagement Officer

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Officer