

Effective Online Tools

Ruben Hernandez

www.fourelementsglobal.com

Ruben will send list of resource links to participants.

Participants from: Toxic Soil Builders, Arizmendi Association / Arizmendi Bakery, Lusty Lady SF, Canadian Worker Cooperative Federation, Monument Futures, Algiers Community Collective / Common Ground Health Collective.

Questions for participants

How do you do the following: manually, desktop, or online?

- Website
- Customer Information
- Internal document management
- Newsletters
- Finances
- Scheduling meetings

Project, document, task and scheduling

www.dotproject.net

Open source, needs to be hosted. Can "check out" documents like a library - it locks files from being changed. Has central calendaring system, and other functions.

Content management systems (CMS)

Updating content is easy and needs no computer/programming experience. The installation and design may need outside support, through some CMS have templates. Needs to be hosted somewhere.

www.joomla.org

www.drupal.org

Drupal has "civic CRM", a customer resource management module.

Customer Resource Management (CRM)

www.sugarcrm.com

Organizes relationship between an organization and individuals. Could also be "Member Resource Management," "Student Resource Management," etc. Keeps customer information, can keep fundraising contact info there. Accounts page keeps: activities, contacts, history, opportunities. Can see all activities done, all stuff sold. Can download to your web host or be hosted on their site. Needs to be diligently updated.

Newsletters

www.constantcontact.com (paid option)

Emails newsletters to your list or lists. Good drag and drop templates, and keeps statistics and detail on email bounces, newsletter reads, number of clicks on links, most popular links, who clicked in what. Cost depends on size of list, starts around \$15/month

<http://www.phplist.com/> (open source option)

Free to download and host on your site. No good templating - needs some programming skills.

www.groundspring.org

Combines newsletter emails and fundraising donations. Used by many nonprofits.

Finances

Keeping finances online: Quickbooks. looks like desktop version. \$25/month online, good for mobility. Desktop cost is more like \$500 to \$700. Can give outside accountant a password to online version instead of having them come use your computer.

Scheduling meetings

www.dotproject.com

Gmail calendar is also good, but everyone has to have a gmail account.