

Seltzer CRM
Penguicon 2013
Edward L. Platt
ed@elplatt.com
@EdwardLPlatt

- Intro
 - Who I am
 - Why we need a CRM (and what a CRM is)
 - i3 Detroit was growing quickly
 - Too many members to fit in someone's head
 - Why we need a new CRM
- Principles of Seltzer
 - Reduce the time it takes to run a hackerspace
 - Increase the number of people who can help run a hackerspace
 - Intuitive and easy to use without a lot of training
 - Build a community to allow multiple spaces to share skills
- Installation
 - Get the code from github
 - Need web server and database
 - Configuration
 - Run install file
- Membership
 - Create
 - Create plan "Supporting Member"
 - Create member "Tux Penguin"
 - Show import file
 - Import members
 - Update plan Standard Member: \$39
 - Update plan Core Member: \$89
 - Update plans
- Roles and Permissions
- Billing
 - Run automatic billings
 - Show payments page
 - Show member account page for Tux
- Payments
 - Add manual payment for Tux and show updated account
 - Import amazon payments
 - Transfer \$195 from Tamara to Shawn
- Reports
 - End membership
 - Show lapsed email report

- Add new membership
- Current status
 - Use at i3
 - Installs at other hackerspaces
 - Weekly dev sessions
- Future plans
 - Upcoming release with paypal support
 - Mentorship module
- Why this is exciting for the hackerspace and makerspace movement
 - Organization is one of the biggest challenges faced by movements
 - Tech is giving us new ways to organize
 - More hackerspaces, and more productive hackerspaces
 - Replaces hierarchy and empowers all members of the group