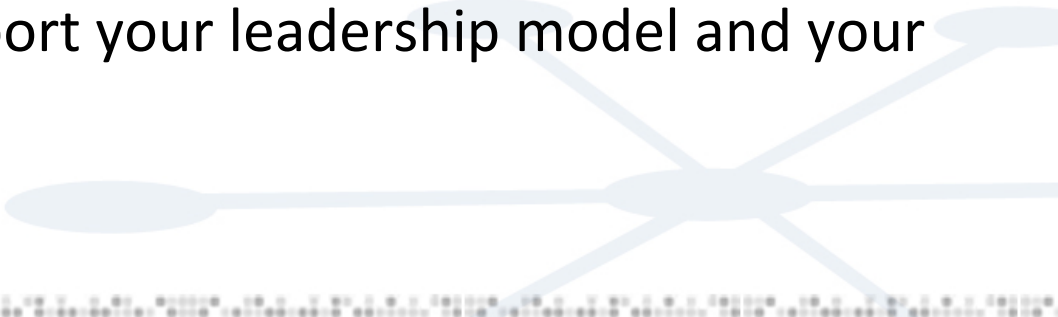




PROGRESSIVE TECHNOLOGY PROJECT

More Than Just a List of Numbers: Using PowerBase Strategically

PB: More Than Just a Contact List

- What is your leadership model or how do you determine your most engaged folks?
 - How do you know you are organizing effectively?
 - What are your techniques for measuring the effectiveness of your organizing?
 - How can PowerBase support your leadership model and your organizing work?
- 

Group Discussion

- What are you using PB regularly for?
- What don't you use it for, but want to?



Regroup:

- What are folks using it for consistently?
- What do you WANT to be using it for?
- Did you hear about anything you wanted to try?





PROGRESSIVE TECHNOLOGY PROJECT

Getting a Handle on Your Data

Goal of today and tomorrow:

To help you put your work into practice in PowerBase, and then step back and refine.

Repeat. Again and again.



In other words, to get you to....



Zoom out



Zoom in



Zoom out



Zoom in



Zoom out



Zoom in



- Reflections on filling out worksheet?
- Did you notice gaps in the data you collect regularly?
- Did any of your/others' answers surprise you?





PROGRESSIVE TECHNOLOGY PROJECT

Customizing Your PowerBase

What we'll cover:

- How to add a custom field
- Cautionary word about new contact subtypes/custom field sets
- Use your answers in #1-5 from worksheet as a reference for what special data you'll need to collect, and possibly add

I want to collect some data in PB that we don't have a field for yet.

I want to track which journals/publications/news outlets our media contacts contribute to.



- First, some vocab....
 - Custom Field
 - Custom Field Set
 - Contact subtype



Think first about *where* the new custom field belongs.

- Is there an existing custom field set where it can live?
- Does it belong with all contacts?
- If it's an activity field, does it belong to all activities?

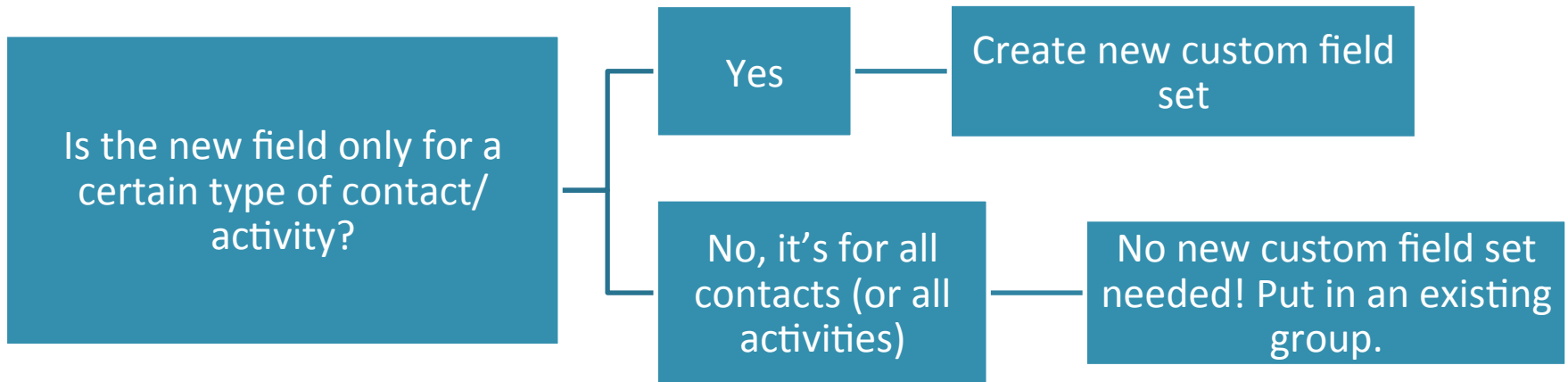


Custom Data

Custom data is stored in custom fields. Custom fields are organized into logically related custom data sets (e.g. Volunteer Info). Use custom fields to collect and store data on forms. You can create one or many sets of custom fields. ([learn more...](#))

Set	Enabled?	Used For	Type	Order	Style	
Communication Details	Yes	All Contact Types	Any	↓ ↓	Inline	↘
Constituent Info - Individuals	Yes	Individual	Any	↕ ↑ ↓ ↓	Inline	↘
Grassroots Info	Yes	Individual	Any	↕ ↑ ↓ ↓	Inline	↘
Demographics	Yes	Individual	Any	↕ ↑ ↓ ↓	Tab	↘
Voter Info	Yes	Individual	Any	↕ ↑ ↓ ↓	Tab	↘
Constituent Info - Organizations	Yes	Organization	Any	↕ ↑ ↓ ↓	Inline	↘
Proposal Info	Yes	Activities	Proposal	↕ ↑ ↓ ↓	Inline	↘
Participant Info	Yes	Participants	Any	↕ ↑ ↓ ↓	Inline	↘
Event Details	Yes	Events	Any	↕ ↑ ↓ ↓	Inline	↘
Organizational Details	Yes	Organization	Any	↕ ↑ ↓ ↓	Inline	↘
Media Outlet Info	Yes	Organization	Media Outlet	↕ ↑ ↓ ↓	Inline	↘
Media Info	Yes	Individual	Media Contact	↕ ↑ ↓ ↓	Inline	↘
Funder Info	Yes	Individual	Funder Contact	↕ ↑ ↓ ↓	Inline	↘
Elected Official Info	Yes	Individual	Elected Official	↕ ↑ ↓ ↓	Inline	↘
Membership Info	Yes	Memberships	Family Membership	↕ ↑ ↓ ↓	Inline	↘
Phonebank questions	Yes	Activities	PhoneBank	↕ ↑ ↓ ↓	Inline	↘
Real PB fields	Yes	Activities	Real Phonebanking	↕ ↑ ↓ ↓	Inline	↘
Grant Info	Yes	Organization	Foundation	↕ ↑ ↓ ↓	Inline	↘
Summary Fields	Yes	All Contact Types	Any	↕ ↑	Tab	↘

+ Add Set of Custom Fields

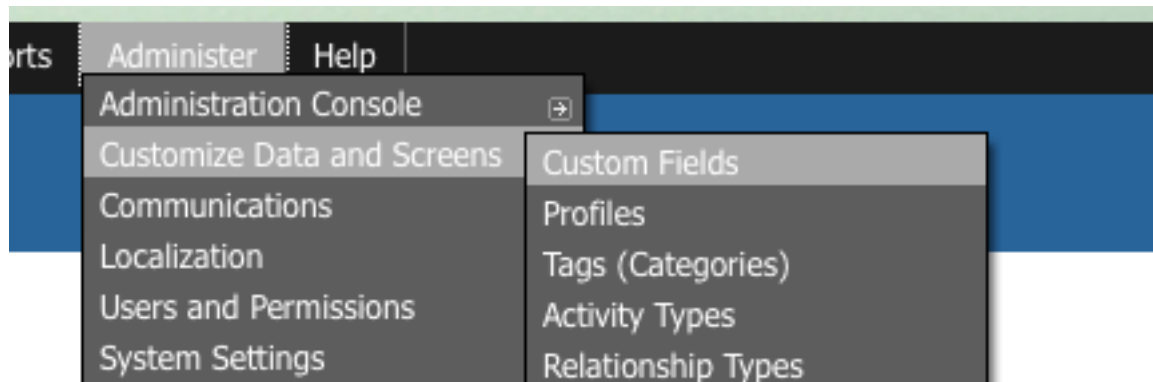


Pro tip:

Most of the time, you won't need to add a whole new custom field set.



Administer > Customize Data and Screens > Custom Fields



Custom Data

Custom data is stored in custom fields. Custom fields are organized into logically related custom data sets (e.g. Volunteer Info). Use custom fields to collect and store data on forms. You can create one or many sets of custom fields. ([learn more...](#))

Set	Enabled?	Used For	Type	Order	Style	
Communication Details	Yes	All Contact Types	Any	↓ ↓	Inline	↘
Constituent Info - Individuals	Yes	Individual	Any	↕ ↑ ↓ ↓	Inline	↘
Grassroots Info	Yes	Individual	Any	↕ ↑ ↓ ↓	Inline	↘
Demographics	Yes	Individual	Any	↕ ↑ ↓ ↓	Tab	↘
Voter Info	Yes	Individual	Any	↕ ↑ ↓ ↓	Tab	↘
Constituent Info - Organizations	Yes	Organization	Any	↕ ↑ ↓ ↓	Inline	↘
Proposal Info	Yes	Activities	Proposal	↕ ↑ ↓ ↓	Inline	↘
Participant Info	Yes	Participants	Any	↕ ↑ ↓ ↓	Inline	↘
Event Details	Yes	Events	Any	↕ ↑ ↓ ↓	Inline	↘
Organizational Details	Yes	Organization	Any	↕ ↑ ↓ ↓	Inline	↘
Media Outlet Info	Yes	Organization	Media Outlet	↕ ↑ ↓ ↓	Inline	↘
Media Info	Yes	Individual	Media Contact	↕ ↑ ↓ ↓	Inline	↘
Funder Info	Yes	Individual	Funder Contact	↕ ↑ ↓ ↓	Inline	↘
Elected Official Info	Yes	Individual	Elected Official	↕ ↑ ↓ ↓	Inline	↘
Membership Info	Yes	Memberships	Family Membership	↕ ↑ ↓ ↓	Inline	↘
Phonebank questions	Yes	Activities	PhoneBank	↕ ↑ ↓ ↓	Inline	↘
Real PB fields	Yes	Activities	Real Phonebanking	↕ ↑ ↓ ↓	Inline	↘
Grant Info	Yes	Organization	Foundation	↕ ↑ ↓ ↓	Inline	↘
Summary Fields	Yes	All Contact Types	Any	↕ ↑	Tab	↘

+ Add Set of Custom Fields

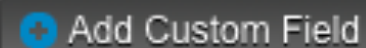
Add a new custom field to an existing **Custom Field Set**:

Event Details	Yes	Events	Any	↑ ↓ ↕	Inline	View and Edit Custom Fields Preview more ▶
Organizational Details	Yes	Organization	Any	↑ ↓ ↕	Inline	View and Edit Custom Fields Preview more ▶
Media Outlet Info	Yes	Organization	Media Outlet	↑ ↓ ↕	Inline	View and Edit Custom Fields Preview more ▶
Media Info	Yes	Individual	Media Contact	↑ ↓ ↕	Inline	View and Edit Custom Fields Preview more ▶
Funder Info	Yes	Individual	Funder Contact	↑ ↓ ↕	Inline	View and Edit Custom Fields Preview more ▶



Media Info - Custom Fields

◆ Field Label	◆ Data Type	◆ Field Type	▲ Order
Media Type - Ind	Alphanumeric	CheckBox	
Beat	Alphanumeric	CheckBox	⬆ ⬆
Media Issue Interest	Alphanumeric	CheckBox	⬆ ⬆

A dark grey button with rounded corners, containing a blue circular icon with a white plus sign and the text 'Add Custom Field' in white.



Add a new custom field for your special contact subtype.

Media Info - Custom Fields

Field Label *

Data and Input Field Type

Select the type of data you want to collect and store for this contact. Then select from the available HTML input field types (choices are based on the type of data being collected).

Database field length

Option Type Create a new set of options
 Reuse an existing set

You can create new multiple choice options for this field, or select an existing set of options which you've already created for another custom field.

Multiple Choice Options

Enter up to ten (10) multiple choice options in this table (click 'another choice' for each additional choice). If you need more than ten options, you can create an unlimited number of additional choices using the Edit Multiple Choice Options link after saving this new field. If desired, you can mark one of the choices as the default choice. The option 'label' is displayed on the form, while the option 'value' is stored in the contact record. The label and value may be the same or different. Inactive options are hidden when the field is presented.

	Default	Label	Value	Weight	Active?
	<input type="checkbox"/>	<input type="text" value="Daily Star"/>	<input type="text" value="Daily Star"/>	<input type="text" value="1"/>	<input checked="" type="checkbox"/>
▼	<input type="checkbox"/>	<input type="text" value="Pioneer Press"/>	<input type="text" value="Pioneer Press"/>	<input type="text" value="2"/>	<input checked="" type="checkbox"/>
▼	<input type="checkbox"/>	<input type="text" value="Huffington Post"/>	<input type="text" value="Huffington Post"/>	<input type="text" value="3"/>	<input checked="" type="checkbox"/>

Bottom half of new custom field page. Decide whether the field is required, searchable, or needs “help” text for people filling it out.

Order * Weight controls the order in which fields are displayed in a group. Enter a positive or negative integer - lower numbers are displayed ahead of higher numbers.

Field Pre Help

Field Post Help

Explanatory text displayed on back-end forms. Pre help is displayed inline on the form (above the field). Post help is displayed in a pop-up - users click the help balloon to view help text.

Required?
Do not make custom fields required unless you want to force all users to enter a value anytime they add or edit this type of record. You can always make the field required when used in a specific Profile form.

Is this Field Searchable?
Can you search on this field in the Advanced and component search forms? Also determines whether you can include this field as a display column and / or filter in related detail reports.

Active?

View Only? Is this field set by PHP code (via a custom hook). This field will not be updated by CiviCRM.

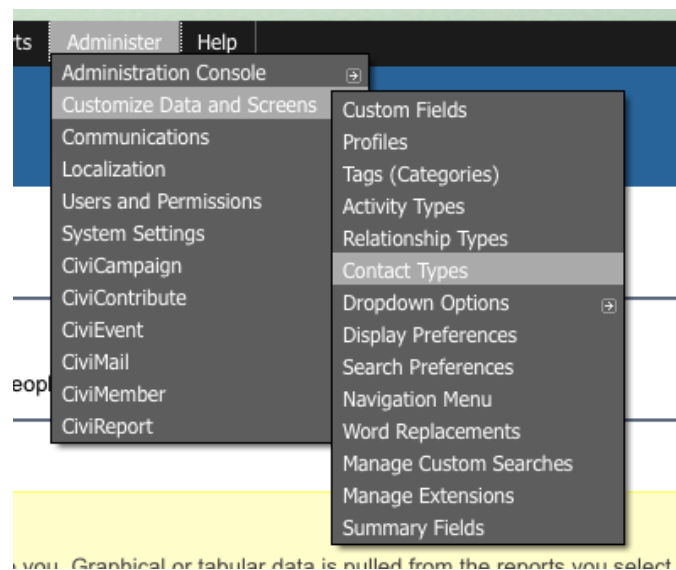
Is the new field *ONLY* for a certain type of contact (or activity)?

If you answered YES, then

- 1) create a new contact type and
- 2) add a new custom group that's associated with that contact type.



Add a new type of Individual: Day Laborer



Contact Types

CiviCRM comes with 3 basic (built-in) contact types: Individual, Household, and Organization (Parent, Staff, and /or Volunteer types from the basic Individual type...). [?](#)

◆ Contact Type	◆ Based On
Individual	(built-in)
Household	(built-in)
Organization	(built-in)
Media Contact	Individual
Funder Contact	Individual
Elected Official	Individual
Media Outlet	Organization
Foundation	Organization

[+ Add Contact Type](#)

A large, light blue decorative graphic in the bottom right corner of the page, consisting of several overlapping circles and lines that form a network-like structure.

Contact Types

CiviCRM comes with 3 basic (built-in) contact types: Individual, Household, and Organization. You can create additional contact types based on Parent, Staff, and /or Volunteer types from the basic Individual type...). ?

New Contact Type

Name *

Basic Contact Type

Image URL ?

Description

Enabled?

Add a new set of custom fields and link it to the Day Laborer contact subtype.

New Custom Field Set

Use Custom Field Sets to add logically related fields for a specific type of CiviCRM record (e.g. contact records, contribution records)

Set Name * ?

Used For * ?

- Any -
- Media Contact
- Funder Contact
- Elected Official
- Day Laborer

Order * ?

Does this Custom Field Set allow multiple records? ?


Display Style ?

Collapse this set on initial display ?

Collapse this set in Advanced Search ?

Is this Custom Data Set active?

Pre-form Help ?

A rich text editor toolbar with various icons for text formatting (bold, italic, underline, strikethrough), alignment, bulleted and numbered lists, indentation, link, unlink, and other editing functions.

Follow the same steps as before to add custom fields.

Day Laborer Information - Custom Fields

Save Save and New Cancel

Field Label * Skills

Data and Input Field Type Alphanumeric Multi-Select

Select the type of data you want to collect and store for this contact. Then select from the available HTML input field types (checkbox, radio, text, etc.)

Database field length 255

Option Type Create a new set of options Reuse an existing set

You can create new multiple choice options for this field, or select an existing set of options which you've already created for another record.

Multiple Choice Options

Enter up to ten (10) multiple choice options in this table (click 'another choice' for each additional choice). If you need more than ten options, you can create an unlimited number of options. The option 'label' is displayed on the form, while the option 'value' is stored in the contact record. The label can be any text you want, but it must be unique. If you need more than ten options, you can create an unlimited number of options. The option 'label' is displayed on the form, while the option 'value' is stored in the contact record. The label can be any text you want, but it must be unique.

Default	Label	Value
<input type="checkbox"/>	Painting	Painting
<input type="checkbox"/>	Landscaping	Landscaping
<input type="checkbox"/>	Construction	Construction
<input type="checkbox"/>	Operating heavy equipment	Operating heavy equipment
<input type="checkbox"/>		

[▶ another choice](#)

Order * 1 Weight controls the order in which fields are displayed in a group. Enter a positive or negative integer - lower numbers are displayed first.

Field Pre Help

Field Post Help

Explanatory text displayed on back-end forms. Pre help is displayed inline on the form (above the field). Post help is displayed in a separate box below the field.

Required?

Do not make custom fields required unless you want to force all users to enter a value anytime they add or edit this type of record.

Is this Field Searchable?

Can you search on this field in the Advanced and component search forms? Also determines whether you can include this field in search results.

Active?

How it looks in a contact record:

▼ Constituent Info - Individuals

Constituent Type	Member
Other Name	
Staff Responsible	
Date Started	May 15th, 2013
How Started	

▼ Day Laborer Information

Skills	Painting, Operating heavy equipment
--------	-------------------------------------

- It seems glamorous and sophisticated to have special contact subtypes.
- But don't add 'em unless you're going to use them.



- Takeaways:

