

Overview of import and export

Custom fields

Exporting your data

Bringing information back

- District Updates
- Voter History
- Voter Engagement Contacts



TYPES OF AVAILABLE ELECTION DATA

NAME AND ADDRESS	ELECTION DISTRICT DATA	REGISTERED VOTER HISTORY DATA
Last Name	County Number	Sos Voterid
First Name	County Id	Year Of Birth
Middle Name	City School District	Registration Date
Suffix	County Court District	Party Affiliation
Residential Address1	Congressional District	Primary-03/07/2000
Residential Secondary Addr	Court Of Appeals	General-11/07/2000
Residential City	Educational Service Center District	Special-05/08/2001
Residential State	Exempted Village School District	General-11/06/2001
Residential Zip	Local School District	Primary-05/07/2002
Residential Zip Plus4	Municipal Court District	General-11/05/2002
Residential Country	Precinct Name	Special-05/06/2003
Residential Postalcode	Precint Code	General-11/04/2003
Mailing Address1	State Board Of Education	Primary-03/02/2004
Mailing Secondary Address	State Representative District	General-11/02/2004
Mailing City	State Senate District	Special-02/08/2005
Mailing State	Township	Primary-05/03/2005
Mailing Zip	Village	General-11/08/2005
Mailing Zip Plus4	Ward	Special-02/07/2006
Mailing Country		Primary-05/02/2006
Mailing Postal Code		General-11/07/2006
Career Center		Primary-05/08/2007
City		General-11/06/2007
State		Primary-03/04/2008
		General-11/04/2008
		Primary-05/05/2009
		General-11/03/2009

Where does the data go in PowerBase?

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 custom data which are not included in the standard CiviCRM 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	View and Edit Custom Fields Preview more ▶
Constituent Info - Individuals	Yes	Individual	Any	↑ ↓ ↓ ↓	Inline	View and Edit Custom Fields Preview more ▶
Grassroots Info	Yes	Individual	Any	↑ ↓ ↓ ↓	Tab	View and Edit Custom Fields Preview more ▶
Constituent Info - Organizations	Yes	Organization	Any	↑ ↓ ↓ ↓	Inline	View and Edit Custom Fields Preview more ▶
Grant Info	Yes	Organization	Foundation	↑ ↓ ↓ ↓	Inline	View and Edit Custom Fields Preview more ▶
Proposal Info	Yes	Activities	Proposal	↑ ↓ ↓ ↓	Inline	View and Edit Custom Fields Preview more ▶
Participant Info	Yes	Participants	Any	↑ ↓ ↓ ↓	Inline	View and Edit Custom Fields Preview more ▶
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 ▶
Demographics	Yes	Individual	Any	↑ ↓ ↓ ↓	Tab	View and Edit Custom Fields Preview more ▶
Media Outlet Info	Yes	Organization	Media Outlet	↑ ↓ ↓ ↓	Inline	View and Edit Custom Fields Preview more ▶

VOTER CUSTOM FIELDS

Home » CiviCRM » Administer CiviCRM » Custom Data

Voter Info - Custom Fields



◆ Field Label
◆ Data Type
◆ Field Type
▲ Order
◆ Req?
◆ Searchable?
◆ Enabled?

Field Label	Data Type	Field Type	Order	Req?	Searchable?	Enabled?			
Party Registration	Alphanumeric	Radio	↓ ▾	No	Yes	Yes	Edit Field	Edit Multiple Choice Options	more ▾
If other party...	Alphanumeric	Text	↕ ↑ ↓ ▾	No	Yes	Yes	Edit Field	Preview Field Display	more ▾
PrecinctName	Alphanumeric	Text	↕ ↑ ↓ ▾	No	Yes	Yes	Edit Field	Preview Field Display	more ▾
State District	Alphanumeric	Text	↕ ↑ ↓ ▾	No	Yes	Yes	Edit Field	Preview Field Display	more ▾
Precinct	Alphanumeric	Text	↕ ↑ ↓ ▾	No	Yes	Yes	Edit Field	Preview Field Display	more ▾
Ward	Alphanumeric	Text	↕ ↑ ↓ ▾	No	Yes	Yes	Edit Field	Preview Field Display	more ▾
City District	Alphanumeric	Text	↕ ↑ ↓ ▾	No	Yes	Yes	Edit Field	Preview Field Display	more ▾
School District	Alphanumeric	Text	↕ ↑ ↓ ▾	No	No	Yes	Edit Field	Preview Field Display	more ▾
County District	Alphanumeric	Text	↕ ↑ ↓ ▾	No	No	Yes	Edit Field	Preview Field Display	more ▾
State Assembly District	Alphanumeric	Text	↕ ↑ ↓ ▾	No	Yes	Yes	Edit Field	Preview Field Display	more ▾
State Senate District	Alphanumeric	Text	↕ ↑ ↓ ▾	No	Yes	Yes	Edit Field	Preview Field Display	more ▾
Congressional District	Alphanumeric	Text	↕ ↑ ↓ ▾	No	Yes	Yes	Edit Field	Preview Field Display	more ▾

Exporting your data

- Decide on a target group
- ID based on neighborhood, ethnicity, zip code



Exporting your data

1. Select your constituents using search
 - Advanced Search allows detailed options; Other Searches will work too
2. Get the list; Select Export Action
3. Decide on fields
 - Don't forget the CiviCRM ID aka Internal Contact
4. Export as CSV (comma separated file)
5. Send to other database (VAN, PDI)

Advanced Search



Search Criteria

Basic Criteria

Complete OR Partial Name

Complete OR Partial Email

Search Views

- default view -

Display Results As

Contacts

Search

Reset Form

Contact Type(s)

- select -

Group(s)

- select -

Search Operator

AND

Search in Trash
(deleted contacts)

Select Tag(s)

- select -

All Tags

Exclude Include by Privacy Option(s)

- select -

OR

Preferred Communication Method

Phone Email Postal Mail SMS Fax
 Email On Hold

Contact Source

CMS User? Yes No

(clear)

Does the contact have a Drupal Account?

Job Title

Preferred Language

- select language -

Address Fields

Location Types

Billing Home Main Other Work

Location search uses the PRIMARY location for each contact by default.

To search by specific location types (e.g. Home, Work...), check one or more boxes above.

Street Address

[Use Address Elements](#)

City

State / Province

Northern Mariana Islands
Ohio
Oklahoma

Zip / Postal Code

OR

Postal Code Range

From To

Find contacts within

erBase Training

Home » CivicRM » Find Contacts

Select export option

Advanced Search

▸ Edit Search Criteria

2602 Contacts State/Province - Ohio ...AND... Country = 'United States'

» Search Builder

Select Records: All 2602 records Selected records only

Print

Export Contacts

Go

Next > Last

Page 1 of 53 Go

A B C D

N O P Q R S T U V W X Y Z All

▲ Name

ate Postal Country Email Phone Action

Aaron, Libby

- actions -
- Add Contacts to Event
- Add Contacts to Group
- Add Contacts to Household
- Add Contacts to Organization
- Batch Update via Profile
- Delete Contacts
- Delete Permanently
- Export Contacts**
- Mailing Labels
- Map Contacts
- Merge Contacts
- New Smart Group
- Print PDF Letter for Contacts
- Record Activity for Contacts
- Remove Contacts from Group
- Restore Contacts
- Schedule/Send a Mass Mailing
- Send Email to Contacts
- Tag Contacts (assign tags)

44505	United States	abc512@email.com	330-555-1745	View Edit more ▸
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Abron, Fortune

44505	United States	abc1153@email.com	330-555-2386	View Edit more ▸
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Acri, Salvatore

44504	United States	abc2235@email.com	330-555-3468	View Edit more ▸
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Adams, Americo

44502	United States	abc440@email.com	330-555-1673	View Edit more ▸
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Adams, Charles

578 Youngstown Ohio
Cohasset Dr

44511	United States	abc1008@email.com	330-555-2241	View Edit more ▸
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Export options

Advanced Search



Export PRIMARY fields provides the most commonly used data values. This includes primary address information, preferred phone and email. Click **Select fields for export** and then **Continue** to choose a subset of fields for export. This option allows you to export multiple specific locations (Home, Work, etc.) as well as custom data. You can also save your selections as a 'field mapping' so you can use it again later.

√1. Search

»2. Export All or Selected Fields

3. Select Fields to Export

Export All or Selected Fields (step 2 of 3)

Continue >>

Cancel

2602 records selected for export.

- Export PRIMARY fields
- Select fields for export

Merge Options

- Do not merge
- Merge All Contacts with the Same Address
- Merge Household Members into their Households

Postal Mailing Export Exclude contacts with "do not mail" privacy, no street address, or who are deceased.

Additional Group for Export

- select group -

Continue >>

Cancel

Advanced Search



Select the fields to be exported using the table below. For each field, first select the contact type that the field belongs to (e.g. select **Individuals** if you are exporting **Last Name**). Then select the actual field to be exported from the drop-down menu which will appear next to the contact type. Your export can include multiple types of contact records, and non-applicable fields will be empty (e.g. **Last Name** will not be populated for an Organization record).

Click **Select more fields...** if you want to export more fields than are initially displayed in the table.

If you want to use the same export setup in the future, check 'Save this field mapping' at the bottom of the page before continuing. You will then be able to reload this setup with a single click.

√1. Search

√2. Export All or Selected Fields

»3. Select Fields to Export

Select Fields to Export (step 3 of 3)

<< Previous

Export >>

Done

Using Field Mapping: Mapping 1 (PZ)

Fields to Include in Export File

Individual	Internal Contact ID		
Individual	First Name		
Individual	Last Name		
Individual	Phone	Home	Phone
Individual	Street Address	Home	
Individual	City	Home	
Individual	State	Home	
Individual	Postal Code	Home	
Individual	Constituen...: Staff Responsible		
Individual	Grassroots...: Issues Interest		

Advanced Search

Select the fields to be exported using the table below. For (Last Name). Then select the actual field to be exported (Last Name). You can include multiple types of contact records, and non-applicable records.

Click **Select more fields...** if you want to export more fields.

If you want to use the same export setup in the future, check the box to be able to reload this setup with a single click.

√1. Search √2. Export All or Selected Fields »3

Select Fields to Export (step 3 of 3)

<< Previous Export >> Done


Using Field Mapping: Mapping 1 (PZ)

Fields to Include in Export File

Individual	Internal Contact ID		
Individual	First Name		
Individual	Last Name		
Individual	Phone	Home	Phone
Individual	Street Address	Home	
Individual	City	Home	
Individual	State	Home	
Individual	Postal Code	Home	
Individual	Constituen...: Staff Responsible		
Individual	Grassroots...: Issues Interest		

Opening CiviCRM_Contact_Search.csv

You have chosen to open

 **CiviCRM_Contact_Search.csv**
 which is a: Microsoft Excel Comma Separated Values File
 from: <https://training2.ourpowerbase.net>

What should Firefox do with this file?

Open with Microsoft Excel (default)

Save File

Do this automatically for files like this from now on.

OK Cancel

USING POWERBASE TO UPDATE DISTRICT DATA



Getting District Data

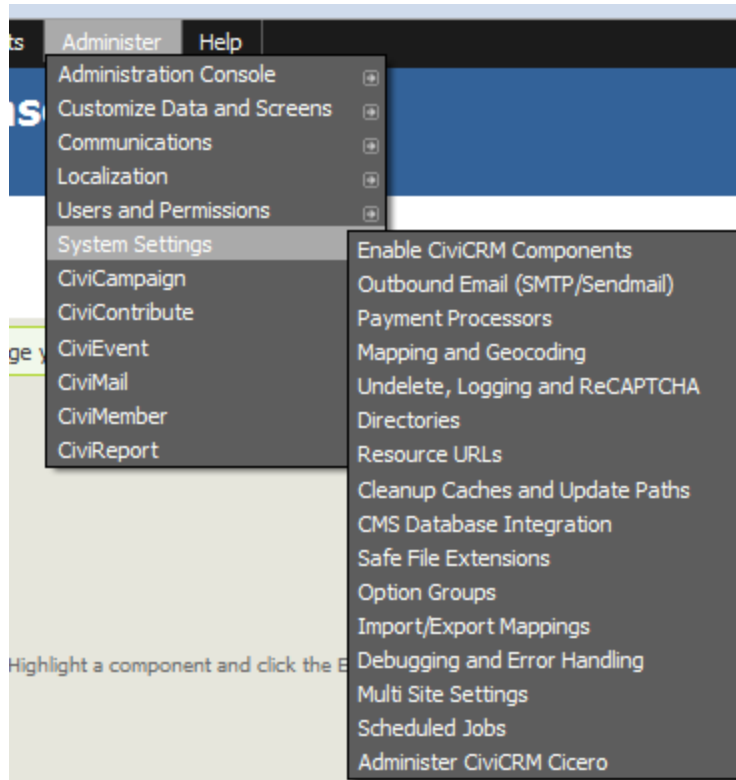
Cicero

With Cicero, an organization can stamp their constituent database with associated legislators at the local, state, and national levels

- It costs a penny or less per update, depending on volume of checks
- There is a discount available for the first 5000 updates on techsoup.org for 501C3 organizations



CiviCRM Cicero Menu Location



The screenshot shows the CiviCRM Cicero menu structure. The 'Administer' tab is selected, and the 'System Settings' sub-menu is expanded. The 'System Settings' sub-menu contains the following items:

- Enable CiviCRM Components
- Outbound Email (SMTP/Sendmail)
- Payment Processors
- Mapping and Geocoding
- Undelete, Logging and ReCAPTCHA
- Directories
- Resource URLs
- Cleanup Caches and Update Paths
- CMS Database Integration
- Safe File Extensions
- Option Groups
- Import/Export Mappings
- Debugging and Error Handling
- Multi Site Settings
- Scheduled Jobs
- Administer CiviCRM Cicero

Other visible menu items include:

- Administration Console
- Customize Data and Screens
- Communications
- Localization
- Users and Permissions
- CiviCampaign
- CiviContribute
- CiviEvent
- CiviMail
- CiviMember
- CiviReport

Partial text at the bottom left: Highlight a component and click the E

Account Settings and Field Selection

[Home](#) » [Administration](#) » [Configuration](#) » [CiviCRM Cicero](#)

CiviCRM Cicero

[Update Civi Contacts with Cicero Information](#)

Cicero Account Settings

Cicero Account settings.

Cicero Account User Name *

Your Cicero API login name.

Cicero Account Password *

Number of contacts to sync with Cicero per cron run? *

Select the CiviCRM date field that you would likd to update when the contact gets synchronized with Cicero.

Date field:

The field that will record when the contact was last sync'd

Select CiviCRM Contact field

-- Select a field --

Choose Cicero district types and map them to CiviCRM fields.

Note: Using both Legislative and Nonlegislative district types will result in two lookups from the Cicero API.

▼ Legislative Districts

- Local
- Ward or other local district
- National Lower (House district)
- National lower house district (new)

CiviCRM Cicero Run Menu

[Home](#) » [Administration](#) » [Configuration](#)

CiviCRM Cicero

[Update Civi Contacts with Cicero Information](#)

[Cicero Account Settings](#)

Upoming sync runs.

Civi Group	Date	Run Limit	Total contacts	Status	Drupal User	Cicero User
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There are no scheduled CiviCRM Cicero sync runs.

Information about this Cicero sync

Group to sync *

- Select -

Select the group whose Contact addresses will get looked up and updated by Cicero.

On what day should this sync run?

Jul 29 2012

At what time of day should this sync run?

Hour Minute AM or PM

1 00 AM

[Schedule CiviCRM Cicero Contact Sync](#)

IMPORTING INTO POWERBASE



Import Contacts

»1. Choose Data Source

2. Match Fields

3. Preview

4. Summary

Choose Data Source (step 1 of 4)

The Import Wizard allows you to easily import contact records from other applications into CiviCRM. For example, if your organization has contacts in Microsoft Access® or Excel®, and you want to start using CiviCRM to store these contacts, you can 'import' them here.

[View](#) [Edit](#) [Delete](#)

Choose Data Source

Data Source *

Upload CSV File

Import Data File *

File format must be comma-separated-values (CSV). File must be UTF8 encoded if it contains special characters (e.g. accented letters, etc.).

Maximum Upload File Size: 8 MB

First row contains column headers

Check this box if the first row of your file consists of field names (Example: 'First Name', 'Last Name', 'Email')

Import Options

Contact Type Individual Household Organization Subtype

For Duplicate Contacts Skip Update Fill No Duplicate Checking

Dedupe Rule

Import Field Separator

Date Format yyyy-mm-dd OR yyymmdd (1998-12-25 OR 19981225) OR (2008-9-1 OR 20080901)
 mm/dd/yy OR mm-dd-yy (12/25/98 OR 12-25-98) OR (9/1/08 OR 9-1-08)
 mm/dd/yyyy OR mm-dd-yyyy (12/25/1998 OR 12-25-1998) OR (9/1/2008 OR 9-1-2008)
 Month dd, yyyy (December 12, 1998)
 dd-mon-yy OR dd/mm/yy (25-Dec-98 OR 25/12/98)

Import Contacts



√1. Choose Data Source

»2. Match Fields

3. Preview

4. Summary

Match Fields (step 2 of 4)

Review the values shown below from the first 2 rows of your import file and select the matching CiviCRM database fields from the drop-down lists in the right-hand column. Select '- do not import -' for any columns in the import file that you want ignored.

If you think you may be importing additional data from the same data source, check 'Save this field mapping' at the bottom of the page before continuing. The saved mapping can then be easily reused the next time data is imported.

<< Previous

Continue >>

Cancel

Saved Field Mapping: Voter Import

Column Names	Import Data (row 1)	Import Data (row 2)	Matching CiviCRM Field
Civcrm ID	638	528	Internal Contact ID *
SOS_VOTERID	OH0018469571	OH0018463674	State Voter File ID :: Voter Info
COUNTY_NUMBER	50	50	- do not import -
COUNTY_ID	468	885	Internal Contact ID *
constituent type	Member	Member	- do not import -
LAST_NAME	RIEBE	PITTS	Last Name *
FIRST_NAME	MICHAEL	JOANN	First Name *
Middle Name	K	L	Middle Name

Import Contacts

√1. Choose Data Source

√2. Match Fields

»3. Preview

4. Summary

Preview (step 3 of 4)

The information below previews the results of importing your data in CiviCRM. Review the totals to ensure that they represent your expected results. Click 'Import Now' if you are ready to proceed.

<< Previous

Import Now >>

Cancel

Total Rows	2009	Total number of rows in the imported data.
Valid Rows	2009	Total rows to be imported.

Saved Field Mapping: Voter Import

Column Names	Import Data (row 1)	Import Data (row 2)	Matching CiviCRM Field
Civcrm ID	638	528	Internal Contact ID
SOS_VOTERID	OH0018469571	OH0018463674	State Voter File ID :: Voter Info
COUNTY_NUMBER	50	50	County Name :: Voter Info
COUNTY_ID	468	885	CountyFileID :: Voter Info
constituent type	Member	Member	- do not import -
LAST_NAME	RIEBE	PITTS	Last Name
FIRST_NAME	MICHAEL	JOANN	First Name
Middle Name	K	J	Middle Name
SUFFIX			Individual Suffix
YEAR_OF_BIRTH	1943	1943	- do not import -

Date of data

3/1/2010

3/1/2010

Date of Voter Data :: Voter Info

▶ Add imported records to a new group

▼ Add imported records to existing group(s)

44504 Members interested in Immigrant Rights
44505 immigrant rights interest
Administrators
Advanced Search IG - TEST
Collecting Emails

▼ Create a new tag and assign it to imported records

Data Imported July 2012

Tag

Description

▶ Tag imported records

<< Previous

Import Now >>

Cancel

2011	PN,GY	PN,GN	Elections 2011 :: Voter Info
2012	PY,GY	PN,GY	Elections 2012 :: Voter Info
2013	PN,GY	PN,GY	- do not import -
Party	P		- do not import -
Date of data			Date of Voter Data :: Voter Info

Importing records...

4% Completed

100 of 2009 records - 8 minutes 16 seconds remaining

- 44504 Members interested in Immigrant Rights
- 44505 immigrant rights interest
- Administrators
- Advanced Search IG - TEST
- Collecting Emails

▼ Create a new tag and assign it to imported records

Data Imported July 2012

Tag

TIPS

- To speed up import, make the data set simpler
- Try to import no more than 20k entries at a time, if you are using the standard import
- Check with Support@progressivetech.org if you need to work with large or complex data sets.

