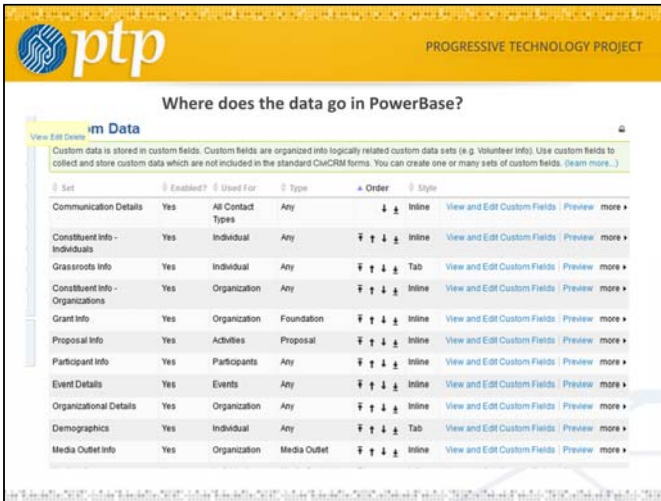




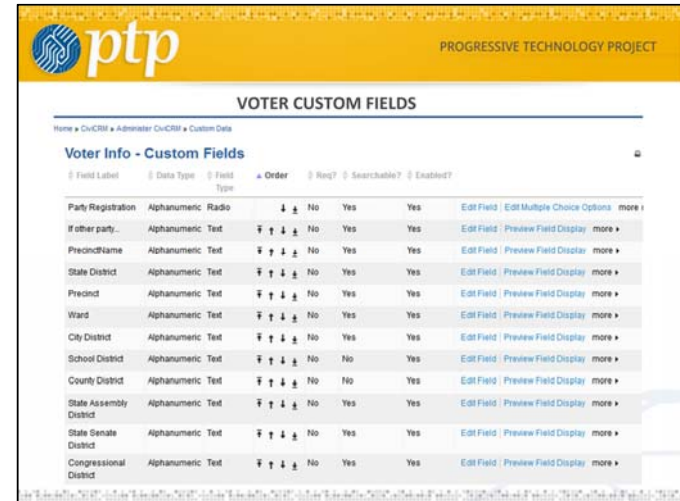
The left column, Name and Address, includes the data you send to the matching process. When it returns from your voter data provider, you may find the addresses reformatted or different from the one in your database. Many groups do not load the addresses from the voter database because they are often not as accurate at what the organizers have accumulated in their door to door work.

If you use the PowerBase link to Cicero, you can get the middle column back. It will match on address, not on voter name, so the person does not need to be registered. You will also get this type of data back when you match with your voter data provider.


You get the third column back if you match with your voter data provider. It is only available for registered voters.



PowerBase has the facility to expand itself. You can add custom fields to many types of records: contacts, activities, contributions, memberships, events. PowerBase administrators can get to this screen from the Administer>Customize Data and Screens>Custom Fields menu option. There is a longer explanation in the CiviCRM manual available via the Help menu. Here is the current url: <http://book.civicrm.org/user/organising-your-data/custom-fields>




Voter Custom Fields have been set up by PTP for PowerBase. The basic design was created to make searching for individuals easier, but these can be further customized as needed. It's these fields that we will use to store all the related voter information in middle and right columns in the earlier slide



PROGRESSIVE TECHNOLOGY PROJECT

Exporting your data

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



PROGRESSIVE TECHNOLOGY PROJECT

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)



You can use advanced search to find the data that you want to export to the voter engagement system. In this example we're only taking records from our state. Click Search to continue

Name	Postal	Country	Email	Phone	Action
Aaron Libby	44505	United States	abc512@email.com	330-555-1745	View Edit more
Aaron Fortuna	44505	United States	abc1153@email.com	330-555-2386	View Edit more
Adm. Salvator	44504	United States	abc2235@email.com	330-555-3468	View Edit more
Adams, Ametico	44502	United States	abc440@email.com	330-555-1673	View Edit more
Adams, Charles	44511	United States	abc1008@email.com	330-555-2241	View Edit more

After you search, you'll get a list result. Select the "action" to "Export Contacts" and press "Go"

Advanced Search

Export options

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:

Continue >>> Cancel

Export Options let you pick which fields you want to export. There is a default of "Export Primary fields", which gives you many columns from the contact. If you are doing this for a match with an outside organization, you are better off selecting "Select fields for export" and press "Continue". You'll get a prompt to use a set of export fields that you created earlier, if you have one, select it. Whether you have one or not, the next screen will allow you to select fields for export.

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

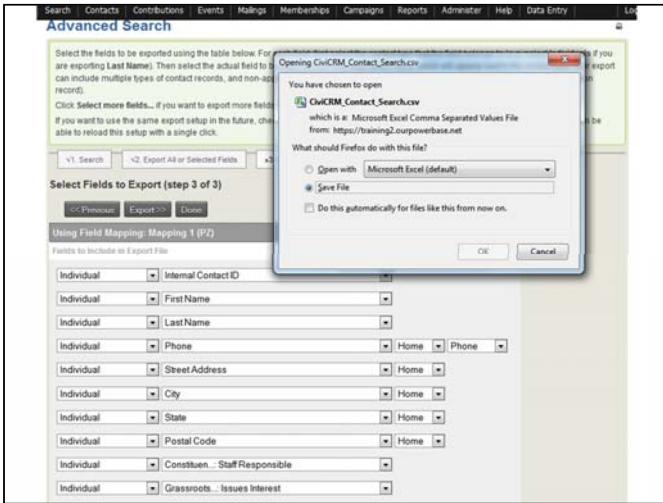
Using Field Mapping: Mapping 1 (PQ)

Fields to Include in Export File

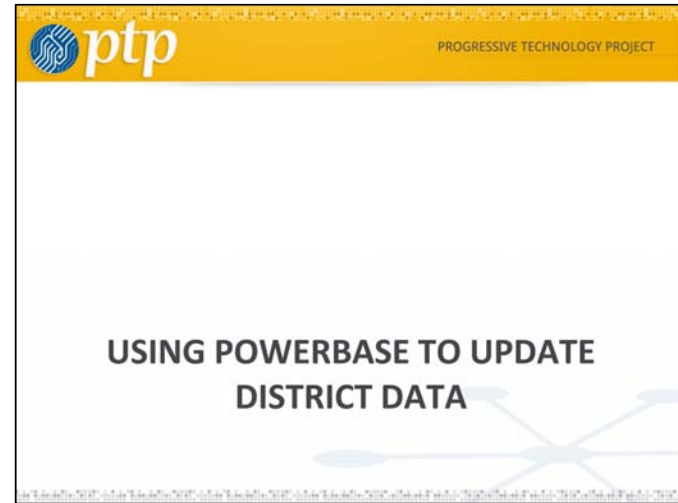
Individual	Internal Contact ID	
Individual	First Name	
Individual	Last Name	
Individual	Phone	Home Phone
Individual	Street Address	Home
Individual	City	Home
Individual	State	Home
Individual	Postal Code	Home
Individual	Constituen... Staff Responsible	
Individual	Grassroots... Issues Interest	

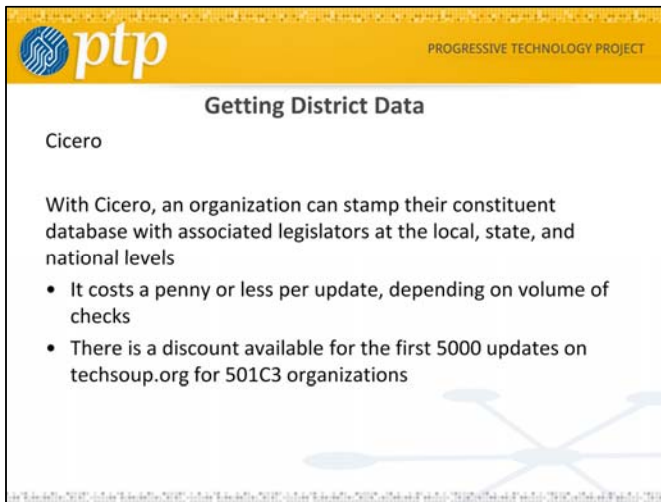
Export field selection

This screen allows you to select the fields to put into the export file for the match process. Always include the Contact ID of the person. You'll need name and address of course. You may want to add other fields that will be useful to your work in the "mycampaign" section of the VAN software. It's a bit tedious to set up the first time, but you can save it and reuse it. Then the next time you export, it will be a breeze.



When the export is done, you'll get an prompt to save the file. It will go to the default location that your browser has for downloaded files.





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

Cicero is a third party software site that PTP links to do the update of district data. The software that PTP has developed is still in beta stage, but it is operational. You have to pay for the updates. You will need an account to access. PTP may provide a group account to get an economy of scale and lower the per unit charge for the look ups. We are waiting to see what the demand will be.

Link to the TechSoup site page:

<http://home.techsoup.org/Stock/Pages/Product.aspx?cat=TechSoup%20Global%20Catalog&category=&id=G-46237>



CiviCRM Cicero Menu Location

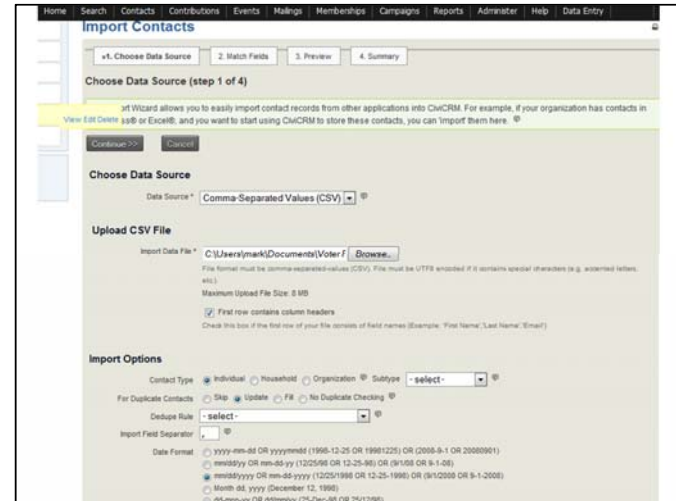
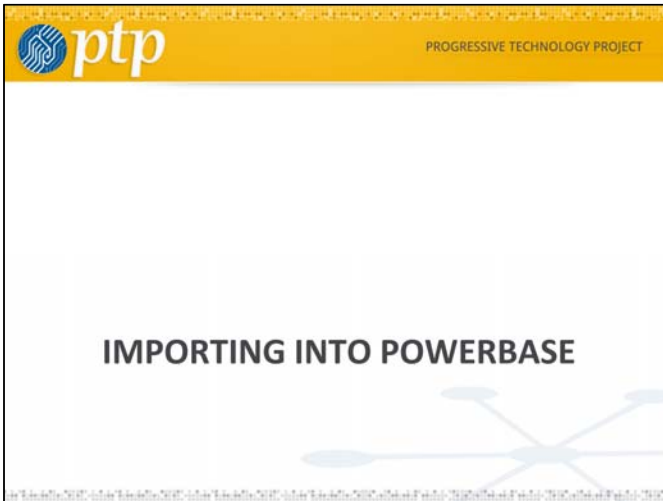
Administration Help

- Administration Console
- Customize Data and Screens
- Communications
- Localization
- Users and Permissions
- System Settings
 - Enable CiviCRM Components
 - Outbound Email (SMTP/Sendmail)
 - Payment Processors
 - Mapping and Geocoding
 - CiviMail
 - Integrations, Logging and reCAPTCHA
 - Directories
 - Resource URLs
 - Cleanup Caches and Update Paths
 - CRM Database Integration
 - Safe File Extensions
 - Custom Groups
 - Import/Export Mappings
 - Debugging and Error Handling
 - Multi Site Settings
 - Scheduled Jobs
 - Administer CiviCRM Users

CiviCRM Cicero Menu Location. PowerBase Administrators can get to this menu.

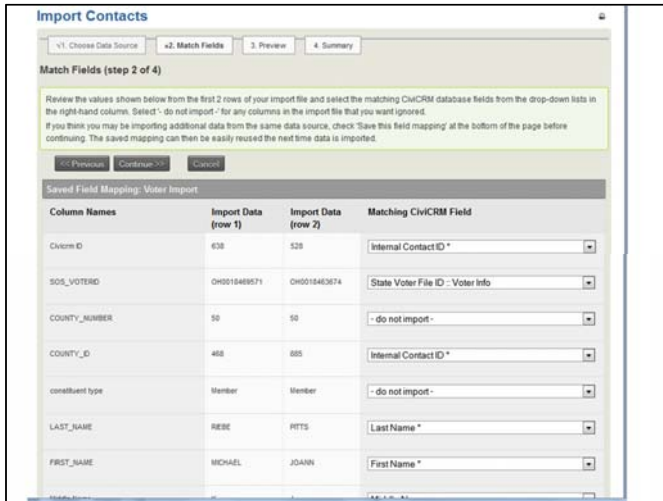
This screen allows you to enter your Cicero account information and create a match list of your PowerBase data fields with the fields in the Cicero database.

After the system is configured, you can run it as needed from this menu. Set up a group of contacts to be matched beforehand.



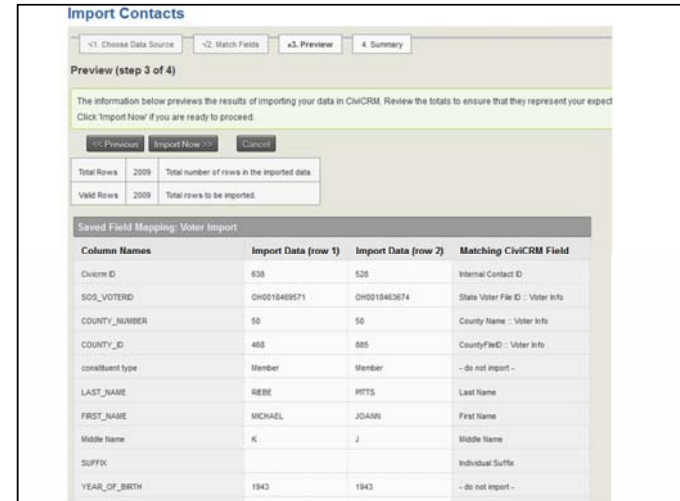
Import file selection screen

Select the import file. You will be updating "individual" records. Check the correct radio button for the date field. If you have saved a mapping from before, select that (at the bottom of the screen and not shown)



Import match fields screen

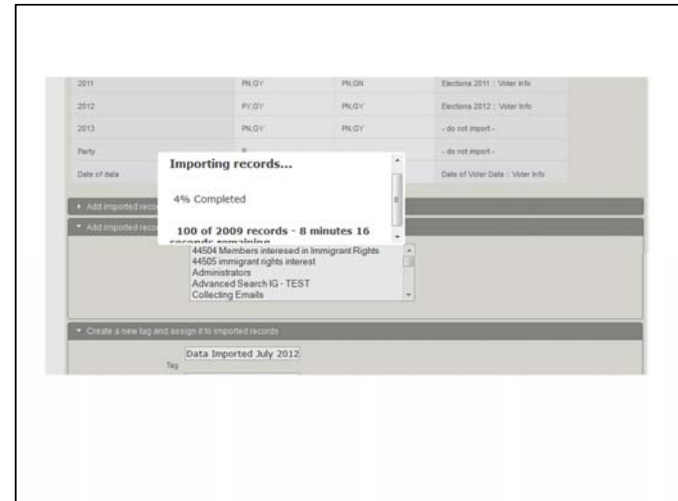
Match the columns in the import file to the correct fields in PowerBase. Save the field mapping for reuse.




On the import confirmation screen, check the count and review to make sure that the fields are matched properly. Scroll down to add the imported records to a group or tag them.



When doing an import, create a tag or group so you can examine your work after the import



Import Status Screen



PROGRESSIVE TECHNOLOGY PROJECT

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@progressivetechnology.org if you need to work with large or complex data sets.

