**Exercises**

**Exercise #1**:

Get a list of people who have attended at least one meeting in the last 6 months AND are interested in one of the Issues Interest in Grassroot Info. Register them for an event that is happening the next month (which you need to create). Track your turnout effort only with those people that are assigned to one staff member (staff responsible field).

**Exercise #2**:

Using the sign-in sheet we will hand out, look up the event on the sign-in sheet and update all the people registered. Change their status as appropriate using the batch update via profile. Then pull up a list of all the people that said they would come and did not show up and put them in a group. Remember to name it appropriately.

**Exercise #3:**

Create a data entry form that uses just the 10 main fields that you need for entering people into the database. Since this data form is for your own private use, automatically place these people into a group to track how much data entry you are doing. Also email your supervisor every time you add a new person. Add your form to the data entry menu.

**Exercise #4:**

Search for all the people in the database that have an email address and save the search.

**Exercise #5:**

Look up all the people who have the same first name and last name in the database. Go through the merge process with at least one of these records.

**How to do the Exercises**

**How to #1:**

Search → Advanced Search → click on Events and click in Event Dates – From and choose a date 6 months ago. Also click Attended in the Participant Status section. Scroll up a little and click on Custom Fields and scroll down to the Grassroots Info section. Check one of the Issue Interest options. Scroll down or up and click on Search.

From the search results screen, select all the records, click on actions and choose Add Contacts to Event. Before you click Go you remember that you need to create the event before you can add people to it. Click on Events and right-click or Ctrl-click on New Event and open the New Event page on a new tab. Create the new event and save it. Close the tab and return to the search results screen. Now click Go and add these contacts to the event you just created.

To track turnout for people registered for this event that are assigned to one staff member, click on Search → Advanced Search. On the first line, change Display Results As from Contacts to Event Participants. Then scroll down to Custom Fields. Click to open and scroll down to Constituent Info - Individuals and choose the Staff Responsible. Then scroll down to Events and choose your event and click Registered in the Participant Status section. Then scroll down and click Search. This brings up a list of participants. Select all the participants and click actions. Choose Batch Update via Profile and click Go. Choose the Update Event Invite Responses profile and click continue. Now make up data for the results of the first call, the second call and the reminder call. Click Update Participants at the bottom of the screen to save the data.

**How to #2:**

Click Events → Find Participants. Fill in Event Name until your event shows up in the pop down. Click on it and click Registered in the Participant Status section. Then click Search. Select all the participants and click on actions and choose Batch Update Via Profile and click Go. Choose the Update Participant Status profile and click Continue. Update the status of those who attended and those who did not. Click Update Participants to save. Then click on Advanced Search and scroll down to Events. Click on Events, enter the name of the event and choose No-show for the Participant Status. Then scroll down and in the Participant Info section choose the Reminder Response as Yes. Scroll down and search. Choose all records and click on actions and choose Add Contacts to Group. Create a new groups and add these records to that group.

**How to #3:**

Click on Administer → Customize → Custom Profiles. Click Add a Profile and give the profile a name. Scroll down and click on Advanced Settings. Click select for Add new contacts to a group and notice that you need to create the group first. Click Contacts → New Group and add a new group. Now return to the New Profile screen and advanced settings. Choose your group to add new contacts to and put in an email address for the Notify when profile form is submitted field. Scroll down and click save. On the subsequent screen you have a button that says Use (Create Mode). Click that button and look at the URL of the page that comes up. Highlight from civicrm to the end and copy.

Click on Administer → Customize → Navigation Menu. Click on New Menu Item. Give your data entry form a name in the title field. Then click in the Url field and paste the URL you just copied. For the Parent choose the Data Entry Menu. Then click Save.

**How to #4:**

Click on Search → Search Builder. In Include contacts where click select record type and choose Individual. Now change Internal Contact ID to Email. Change the operator to IS NOT NULL. Click the Search box at the bottom. Select all the records and click actions and choose New Smart Group and click Go. Name the group, add a description and click the Mailing List box and save.

**How To #5:**

Click on Contacts → Find and Merge Duplicate Contacts. Choose the Individual + Phone Rule and click Use Rule. Click Continue to search through all the Contacts in the database. For one record, click on merge. Any information you want to keep after merging needs to be checked. When ready click Merge (either one).