

PowerBase Initial Organizational Training Agenda

Online version on the Power On Network site: <https://network.progressivetech.org/pb-initial-org-training-agenda>

The following describes the Training Agenda for focusing on PowerBase features, activities, and workflows that will be covered in the PowerBase Initial Organizational Trainings. These items may be covered in more than one training depending on the work priorities and relevance of the topic for the organization's training.

How to Request Support and Find Resources

- Email support@progressivetech.org
- Click on SUPPORT menu in PowerBase for additional resources

Navigating around PowerBase

- Logging in and Updating your Profile or Password – click on “MY ACCOUNT” in upper Right, click on EDIT tab and update your profile or password
- HOME Page and DASHBOARD – click on the “HOME” link to return to the main PowerBase page
- Playing with the Dashboard and adding the Activities Report dashlet
- Review the menu items
- Try “Quick Search Box” at upper left with the magnifying glass – start typing your last name, you’ll see list of names or your name and click to select it
- Reviewing information in your Contact Record

Reviewing and Updating a Contact Record

- Use Quick Search to find your record
- Review tabs (Summary, Activities, etc.)
- Review Fields from Summary Tab – hover your mouse over each area –
 - Employer – Update for your organization
 - Constituent Type – required field
 - Relationships
 - Phone, Email (location types) – enter home, enter work, discuss “primary”
 - Address
- Click EDIT button for the Contact record – review fields of information
 - Open the ADDRESS area and edit to share address of your organization
 - Review Greetings area
- Activity Tab
- Event Tab
- Other Tabs: Contributions, Summary

Add New Contact

- Workflow: use Quick Search to see if contact exists before adding new contact

- Adding new Individuals or new Organizations from CONTACTS menu
- Review contact types
- Quick Entry menu links – Quick Add Individual, Quick Add Organizations

Working with Activities

- What are activities
- Review Activity Types
- Create an activity, assign to another staff, and schedule for future date, review dashboard

Searches

- Advanced Search for Contact Records – find a list of people and add them to a smart group, use “News List” values
- Review advance search areas
- Display results as
- Layering searches (use groups), Search Builder, show other search options
- ACTIONS results – try “Map Contacts” option
- Point out Recent Items
- Show other Search Options

Groups, Tags, Mailing Groups – Managing lists

- Review Groups and terminology
 - Smart Group – contacts that meet a particular criteria will auto-populate this group – smart groups are created from results of a search
 - Static Group – contacts don’t meet a particular criteria
 - Groups of “Mailing List” type – used for sending email blasts – contacts can see which lists they are subscribed to based on this type
- Discuss naming conventions
- Create smart groups and mailing lists
- Tip: avoid creating sub-groups

Where Custom Fields live

- Review information on contact record
- Administer > Custom Data and Screens > Custom Data
- Remember: If field currently exists in PowerBase – DISABLE the field, DON’T Delete
- More about creating new custom fields later

What are Profiles?

- Administer > Custom Data and Screens > Profiles
- Review Profiles for Search Views, Quick Add Individual, Quick Add Organizations, etc.
- Can edit existing profiles by adding fields as long as the field already exists

- More about creating new profiles later

Adding Registrations & Creating Events

- From contact record > click EVENT tab > click ADD EVENT REGISTRATION click SUBMIT CREDIT CARD EVENT REGISTRATION
- Events > Manage Events – look at existing events, create a new event

Adding Contributions & Creating Contribution Pages

- From contact record > click Contributions tab > click RECORD CONTRIBUTION (CHECK, CASH, EFT) click SUBMIT CREDIT CARD CONTRIBUTION
- Contributions > Manage Contributions – look at existing contributions, create a new contribution page

Mailings

- Review email templates
- From addresses
- Creating new email – Mailings > New Mailings
- Tips in creating content and working with images

Creating Custom Fields

- Review Custom Field groups – Constituent Info, Grassroots Info, etc.

Creating and Working with Profiles

- Review Email signups for collecting info online

Creating and Working with Reports

- See Existing Reports
- Creating a New Report
- Exporting data – see also <https://docs.civicrm.org/user/en/4.7/common-workflows/exporting-your-contacts/#exporting-your-contacts>

Working with Campaigns

- What are Campaigns in PowerBase?
- Creating a Campaign
- Using Campaigns for activities, events, contributions, etc.

Memberships

- How Memberships are used in PowerBase
- Review Membership Status Rules and Membership Types
- Creating Memberships (with fees or no fees)

Other Features, Topics, Workflows – Advanced topics

- Deduping records – see <https://docs.civicrm.org/user/en/4.7/common-workflows/deduping-and-merging/#what-is-deduping>

- More Admin features (Administer Menu, User Permissions, etc.)
- Webforms – see <https://network.progressivetechnology.org/node/1120>
- Payment Processors – see <https://network.progressivetechnology.org/node/1129>
- Phonebanking with PowerBase – see <https://network.progressivetechnology.org/node/1109>
- E-Petitions – see <https://network.progressivetechnology.org/node/1033>
- Using Events for Event Turn Out (e.g. organizing series of phone calls to turn people out to a meeting or action) – see <https://network.progressivetechnology.org/trainings/powerbase/tracking-turnout>
- Creating Fundraising Personal Campaign Pages – see <https://network.progressivetechnology.org/node/1029>
- Working with Price Sets – see <https://docs.civicrm.org/user/en/4.7/events/complex-event-fees/#price-sets>

Resources:

- Click on the SUPPORT menu in PowerBase
- Power On Network site – <https://network.progressivetechnology.org>
 - PowerBase Tips tab – can search for topics here
 - Trainings tab > select POWERBASE in TRAINING CATEGORY > click APPLY - can see PowerBase trainings and documentation
 - Documents of interest related to PowerBase initial trainings:
 - <https://network.progressivetechnology.org/system/files/user-packet-day-one-fundamentals.pdf>
 - <https://network.progressivetechnology.org/system/files/user-packet-day-two-advanced-organizing.pdf>
 - https://network.progressivetechnology.org/system/files/fundraising_packet_2.pdf
 - <https://network.progressivetechnology.org/system/files/fundamentals-user.pdf>
 - https://network.progressivetechnology.org/system/files/adv-advanced-track_2.pdf
- CiviCRM book - <https://docs.civicrm.org/user/en/4.7/>
- PowerBase video tutorials: <https://www.youtube.com/user/PowerOnPTP/playlists>