



*Welcome to
Progressive Technology Project's*

PowerBase Training

September 14, 2009

San Francisco, CA

Mitchell Kapor Foundation



Welcome!

PowerBase Tour in a NY Heartbeat

Scenario

You met Beth Ambrose at a direct action at the court house and you had time to kill to learn more about Beth in during your 24 hours in the “brink”

Exercise 1: Tracking & Assessing Interactions with your Contacts

- **Configure custom data:**
 - set “Staff Responsible” to your name; Add an **Activity Type** of “Direct Action” add new field in Core Info Group: **Date Started**
- **Edit Beth Ambrose’s contact record**
 - edit staff responsible as yourself
 - Set her Contact Type to “Activist”
 - add her Relationship: employee of APEN
 - edit Grassroots info
 - Leadership Level - 1
 - Issues Interest – “Immigration Rights” and “Peace”
 - Volunteer Interest – “Canvassing”
- **Record Activity**
 - Add that Beth participated in the Direct Action for 29 hours

Let's practice doing some searches for funsies

Exercise 2: Searches & Exporting / Reporting

- Find activities where Leadership Level is 1
- Search for Volunteers – create smart group called PowerBase Friend
- Search for people in NH, add to smart group called PowerBase Friends
- Batch update of PowerBase Friends groups using the Update Grassroots Info profile – edit Interest Issue is Peace, and make sure Volunteer is checked
- Search for all the “PowerBase Participants” group who gave between \$1 and \$500 and export their contact info along with contribution type, amount and date

Hey, we actually received donations from our members!

Exercise 3: Memberships & Contributions

- Lesli Geller donated \$75, with check 4444, when during a phone bank call, for the Summer 2009 Phone bank on Healthcare, in memory of her mom, Lauren Geller
- Cynthia Scott became a Student member, so record the her contribution
- Look at the Donor Report Summary (hint: CiviReport)
 - Show email, contribution type, contribution source
 - Group by Received Date, contrib. type and source
 - Filter by donations received This Year that have a donation status of completed

Start Planning the Economic Justice House Party

Exercise 4: Events

- Create an Event House Party to meet new folks who are interested in Economic Justice
 - Make it a free event and enable online registration
 - Use profile “Name and Address” for top the page, and the “Participant Info” profile to bottom
 - Search for people in State District 17 and add them to the Event, set their status to Registered
 - Then look at the event and see who’s registered; do a batch update of those Registered & use the Profile “Participant Info”, indicate that everyone needs a Ride TO the event

Small Project

You are Preparing for your upcoming event:
PowerBase Volunteer Canvassers Training

Small Group Project Scenario

part 1

- Create or Edit groups called Volunteers and one for Activists and add the appropriate individuals to each group based on their Contact Type
- Search for groups Volunteers and Activists and add to a new group called “PowerBase Canvassers” (hint: look at custom searches)
- Search for people in CA and add to PowerBase Canvassers

Search Challenge: is there another way to create this group of PowerBase Canvassers?

Small Group Project Scenario: Part 2

- Update existing “Name and Address” profile to add an email address
- Create Event, “PowerBase Volunteer Canvass training,” a free event, set up for online registration; add name and address profile to top of page, and participant info profile at bottom of page
- Search for “PowerBase Canvassers” group and add them to the event and register
- Search for “PowerBase Canvassers” and do a batch update using the “Participant Info” profile and update their status to Confirmed because everybody told you they’d be there be square!
 - Also Melissa Carlow needs childcare for 3 children
- View Event info and see what the registration looks like
- Jeanie Ash couldn’t make the event but wanted to give you a general donation (create a new campaign source) for \$35 with check 3232

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