

PTP PowerBase Training Notes

Tracking & Assessing Interactions with your Contacts

- Show **Maria Demo**'s record
- Organization employer – Relationship
 - Show e.g. Network member?
- Edit Grassroots info
- You can add When individual came to the organization and how
- Show Activities
- Create groups (all Jane's, all the 2's & 3's in grassroots info)

Be ready to answer householding

Exercise 1:

- Add custom value –
 - 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 contact record
 - edit staff responsible
 - Contact Type - Activist
 - edit Relationship: employee of APEN
 - Edit Grassroots info
 - Leadership: 1
 - Issues Interest – Immigration Rights and Peace
 - Volunteer interest: Canvassing
- Record Activity
 - Add that Beth participated in the Direct Action for 29 hours

Searches:

- Smart groups “saved searches” vs groups “static group” (subscription list) – Manage Groups
- Search for people interested in Peace or Workers Rights - create smart group Peace Workers

PTP PowerBase Training Notes

- **Demo Only:** send email to smart group Workers
- Batch update, Use Profile – grassroots info
- Search group of people in MA, batch update grassroots info
- Show Export feature

Exercise 2:

- 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

Membership & Contributions:

- Contributions – show campaign source code & methods custom data
- simple donation for Lauren Birds
- Show Lauren’s Activities
- Demo Membership – look at membership types and roles, record contribution... still have to contribution record to enter the source & method
- Show CiviReport Contribution report

Exercise 3:

- 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

PTP PowerBase Training Notes

- Filter by donations received This Year that have a donation status of completed

Events:

- Show PowerBase Training Event – show group I created, the event, Name & Address profile to top, Participant Info Profile to Bottom
- Show Annual Member Meeting – add MA people,
- Do Batch update of MA people using CiviEVENT

Exercise 4:

- 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

Scenario:

- 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?

PTP PowerBase Training Notes

- 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