

Setting up and Using the Summary Fields Set

Summary Fields Introduction

PowerBase has a feature to make it easier to search for major donors, recent donors, lapsed donors as well as to show a synopsis of a donor's history. The feature, called Summary Fields, extends your PowerBase data by creating a tab of fields that total up and summarize donation history.

Once you've completed set-up, this tab will appear alongside other tabs in contact records showing the totals for each individual.

All of the data in the Summary Fields group are calculated from other data entered into your PowerBase as contributions, membership or event participation. The benefit of making these items available as calculated fields is that they can be searched in Advanced Search and used as a basis for a smart group as well as for tokens in email and print communications. The set of available fields include:

- Total Lifetime Contributions
- Total Contributions this Year
- Total Deductible Contributions this Year
- Total Contributions last Year
- Total Contributions Year Before Last Year
- Total Deductible Contributions last Year
- Total Deductible Contributions Year Before Last
- Amount of Last Contribution
- Date of Last Contribution
- Date of First Contribution
- Largest Contribution
- Count of Contributions
- Average Annual (Calendar Year) Contribution
- Date of Last Membership Payment
- Amount of Last Membership Payment
- Name of the last attended event
- Date of the last attended event

There is a link on the Administration menu to allow you to pick which fields of the custom field set to implement and which contribution types (financial types) to include in these totals. You also have the option of adjusting the fiscal year end setting in CiviCRM.

After the initial set up, these fields are updated whenever someone modifies the related records. For example, a new contribution of the correct type will automatically change, at

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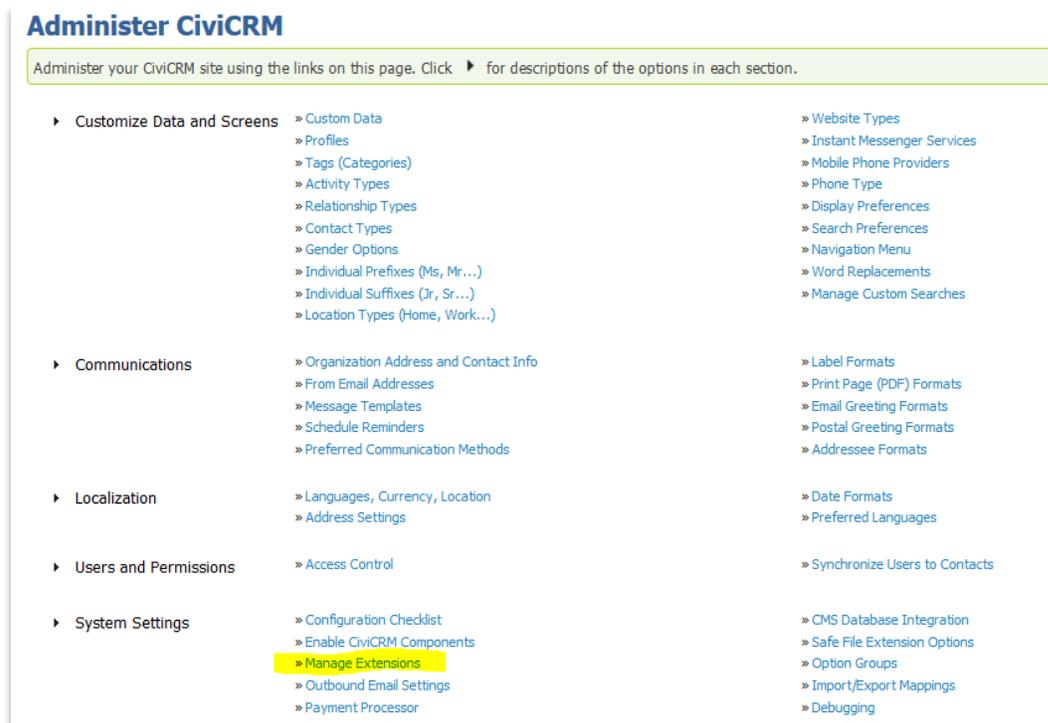
minimum, the Total Life Contributions, Total Contributions this Year, Total Deductible Contribution This Year, Count of Contributions, Average Annual Contribution, Date of Last Contribution and Amount of Last Contribution. If it's the first contribution for this individual or organization, the Date of First Contribution and the Largest Contribution will also be changed.

Summary Fields Setup

For Summary Fields to work, there are two steps required.

Enable the Software Extension

First a PowerBase Administrator must enable what's known as an "extension" which installs the software on your PowerBase. To do this, go to **Administer**, select and click **Administration Console** and find **Manage Extensions** in the **System Settings** section. Click on that link.



Click on **Install** on the **Summary Fields** line and the software will be installed and ready for configuration.

Configure the Software

Go to **Administer > Customize Data and Screens > Summary Fields**.

You will get a screen with four major headings:

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Active Fields – which allows you to specify which fields should be included in the Summary Fields. None of the fields are required, so you can skip irrelevant fields.

Contribution Types – specifies which kind(s) of contributions are to be included in the totals. For example, event fees are not usually included in this total, so you would not select that contribution type.

Membership Contribution Type – if you are showing the latest membership payment, select one or more contribution types to be used for membership payments.

Event Types – Select the type of events to be included in the Name and Date of Last Attended Event fields.

Participant Status – Mark the participant status that is required for the event to be included in the Name and Date of Last Attended Event fields.

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Figure 1 Summary Fields Set Configuration Options

SumFields

Summary Fields Settings

Please indicate which of the available summary fields you would like to enable.

Active Fields Total Lifetime Contributions
 Total Contributions this Year
 Total Deductible Contributions this Year
 Total Contributions last Year
 Total Deductible Contributions last Year
 Total Contributions Year Before Last
 Total Deductible Contributions Year Before Last
 Amount of last contribution
 Date of Last Contribution
 Date of First Contribution
 Largest Contribution
 Count of Contributions
 Average Annual (Calendar Year) Contribution
 Date of Last Membership Payment
 Amount of Last Membership Payment
 Name of the last attended event
 Date of the last attended event

Please indicate the financial types you would like included when calculating contribution related summary fields.

Financial Types Campaign Contribution
 Donation
 Event Fee
 Member Dues

Please indicate the financial types you would like included when calculating membership payment related summary fields.

Membership Financial Types Campaign Contribution
 Donation
 Event Fee
 Member Dues

Please indicate the event types you would like included when calculating event-related summary fields.

Event Types Canvass
 Conference
 Direct Action
 Exhibition
 Fundraiser
 Meeting
 Performance
 Workshop
 Lobby

Please indicate the participant status you would like included when calculating event-related summary fields.

Participant Status Attended
 Awaiting approval
 Cancelled

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Press the “Save” button and the fields will be created and updated. This process can be repeated if you decided to change your configuration. However, if you remove some fields from the Summary Fields set after you have already used these fields in a profile, the profile will no longer work properly. You will have to repair it by removing the fields from the profile.

Using the Summary Fields

Once you’ve created the Summary Fields you can display them and search on them.

Contact Record Display

If you go to a contact record you will see a new tab called “Summary Fields”. Click on it to get the fields and their values for that person.

The screenshot shows a web application interface with a navigation bar at the top containing tabs for Summary, Contributions (6), Pledges (0), Memberships (0), Activities (1243), Events (9), Relationships (2), Groups (5), Notes (0), Tags (0), Change Log (14), Voter Info (0), and Summary Fields (1). Below the navigation bar is a button labeled 'Edit Summary Fields'. The main content area is titled 'Summary Fields' and contains a table with the following data:

Summary Fields	
<input type="button" value="Delete"/>	
Total Lifetime Contributions	\$ 2,000.00
Total Contributions this Year	\$ 1,500.00
Total Deductible Contributions last Year	\$ 500.00
Total Deductible Contributions this Year	\$ 1,500.00
Total Deductible Contributions Year Before Last	\$ 0.00
Total Contributions last Year	\$ 500.00
Total Contributions Year Before Last	\$ 0.00
Total Soft Contributions Year Before Last	
Amount of last contribution	\$ 900.00
Date of Last Contribution	January 10, 2014
Date of First Contribution	January 1, 2013
Largest Contribution	\$ 900.00
Count of Contributions	6
Average Annual (Calendar Year) Contribution	\$ 1,000.00
Date of Last Membership Payment	January 10, 2014
Amount of Last Membership Payment	\$ 900.00

These are Display Only fields – you cannot edit them directly on this page. They will only change when the data from which they are calculated changes (i.e. new contributions or event registrations are added, for example).

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Advanced Search

In Advanced Search, the fields will appear within the Custom Field Group.

The screenshot shows a panel titled "Summary Fields" with a list of search criteria. Each criterion consists of a label, a "From" input field, and a "To" input field. Some date-related fields include a calendar icon and a "(clear)" button. The fields are:

- Total Lifetime Contributions From To
- Total Contributions this Year From To
- Total Deductible Contributions this Year From To
- Total Deductible Contributions last Year From To
- Total Contributions last Year From To
- Total Contributions Year Before Last From To
- Total Soft Contributions Year Before Last From To
- Amount of last contribution From To
- Date of Last Contribution - From To (clear)
- Date of First Contribution - From To (clear)
- Largest Contribution From To
- Count of Contributions From To
- Average Annual (Calendar Year) Contribution From To
- Date of Last Membership Payment - From To (clear)
- Amount of Last Membership Payment From To

Click to expose the Custom Field group and find the Summary Fields. These fields can be used for ad hoc searches as well as supporting a smart group. For example, if you want to show everyone who gave more than \$250 last year, set the Total Contributions last Year “from” to \$250 and leave the “to” blank. Save the results as a smart group.