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# DAY 4 POWERBASE TRAINING CHEAT SHEET

## CIVICRM PROFILES

CiviCRM Profiles allow you to aggregate groups of fields and searchable features by creating specific subsets of data. Think of a profile as a window into your database. Just like a window to a house allows you to view different objects within, profiles allow you to view different pieces of your data. These profiles allow you to collect information for constituents to selectively share and edit their contact information. Profiles are a great way to batch update information for constituents registering or attending an event. Any new profile you create will correlate with fields in PowerBase.

HINT: Naming your profile to accurately capture the profiles' fields and purpose is the best practice.

*To Add or Edit a Profile*

Basic PATH: **Administer CiviCRM > Customize > CiviCRM Profile > Profile Name\* > CiviCRM Profile Fields > Field Name\*\***

\*In the section **Used For** you **must** check **Profile** and **Search Results** to search this profile in the future

\*\*Profiles must relate to specific CiviCRM record types and field you want to include in this Profile. These include: **Contacts, Individual, Household, Organization, Participants, Contributions, and Membership**

*For Search Results*

Basic PATH: **Find Contacts > Advanced Search > \*Search Views > Select Groups > Search**

1. **Select the search profile you created under "Search Views"**  
Common Search Views are: Update Grassroots Info, Update Core Info, and Update Core Info
2. **Enter any other criteria for your search (e.g. Groups)**

\*Allows you to view your search results with the search profiles you have created

*For Batch Updates*

Basic PATH: **Find Contacts with your criteria > Select Group > Click "All records" or all the records you want to update > Drop down menu: Batch Update via Profile > Go > Select Profile > Continue > Update Contacts**

1. Find contacts with your specified criteria
2. In search results click "All records" or select the records you want to update
3. In **More Actions** select **"Batch Update via Profile" > Go > select Profile Name > Click Continue > Update Contacts**

PowerBase will only allow you to batch update 100 records at a time. To change the number of records to view in your search results, scroll to the bottom right of the page and click on the link for "100".

## *Profiles for Events*

Basic PATH: **Administer > CiviProfiles > Create a Profile using the Participant fields > THEN > Create a CiviEvent > Step 4 of 5 Click "Allow Online Registration > Include Profile > Complete wizard > Test Drive Event**

1. **Administer > CiviProfiles > Create a Profile** using the **Participant** fields
2. Create a **CiviEvent**. In **Step 4 of 5 Click "Allow Online Registration"**
3. **Include Profile** above or below the text
4. Complete the wizard. Then **Test Drive Event**

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## RECAP OF CIVIMAIL

Proper email salutations for your contacts and organizations must be updated through this path.

PATH: **Individual Contact Record > Summary tab > Edit > Core Info**

**Email Salutation**- first name used in emails (e.g. Dear John)

**Postal Salutation**- first name (e.g. Dear Jane)

**Addressee**- first name and last name used in Mailing Labels

*To confirm the salutations work*

PATH: **CiviMail > New Mailing > Step 3: Mailing Content > Insert Tokens**

**Here are the Tokens\* for:**

**Email Salutation:** {contact.custom\_38}

**Postal Salutation:** {contact.custom\_36}

**Addressee:** {contact.custom\_37}

\*Your Tokens will also be listed in your Data Dictionary

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## MEMBERSHIP

This was not covered in this session but we still thought this information would be helpful to you. Use CiviMember only if you have a defined membership plan (e.g. giving levels, track lapsed memberships, renew memberships, etc) . Use CiviContribute to track donations.

You can customize different **Membership Types** and **Membership Status Rules**.

**Membership Types:** you can categorize different types of memberships (e.g. Student Memberships or Gold Memberships).

**Membership Status Rules:** like types, you can define the different types of status' you may want to give to a member<sup>1</sup>.

Basic PATH: **Administer CiviCRM > CiviMember > select Membership Types OR Membership Status Rules**

**Dues:** associated with the **Membership Type** you can define how much each type requires for a due. A Contact will see a summary of their Dues and **Memberships** in their records.

Basic PATH: **Search any Contact > Memberships Tab > Summary page of Active Memberships**

**Donations:** also referred to as **Contribution Type**, these can also be defined within **Membership Type**.

**Contributions:** can be customized and one of five types- donations, event fee, foundation grant, in kind, and member dues may be selected while you create your customized **Membership Types**.

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<sup>1</sup> CiviCRM Documentation. "Membership Status Rules". 21 Oct. 2009.  
<<http://wiki.civicrm.org/confluence/display/CRMDOC/Membership+Status+Rules>>