
DAY 2 POWERBASE TRAINING CHEAT SHEET

SEARCHING

From CiviCRM Home, there are two **Quick Search** fields, one on the Dashboard and one in the left menu bar **Contact Search**. Both let you perform searches on contacts. **Advanced Search** lets you define parameters for any information that is linked to a contact, like Contributions, Events, Relationships, etc.

Basic PATH: **CiviCRM Home** > *type name or* **Advanced Search**

Detailed PATH: **CivCRM Home** > **Find Contacts** > **Advanced Search**, **Search Builder**, or **Custom Searches**

Advanced Search: these are all **AND Searches** *except* **Groups** and **Contact Types** (these are **OR Searches**)

Search Builder: you can *combine* **AND** as well as **OR Searches**

Custom Searches: these are canned searches. One useful search allows you to **Include** and **Exclude Groups**

GROUPS

Groups: these are static searches

Smart Groups: these are saved searches. A good rule of thumb is provide a lot of description for your smart group.

Manage Groups: this allows you to add contacts to your groups

Find Contacts: this allows you to find and add contacts to groups

***Reminder:** **Groups are a more reliable searching tool than a TAG. We recommend using Groups over TAGs.**

MAILING LABELS

It's possible to create mailing labels from the results of any group list you create. All **Contacts** must have the same address location marked in their **Contact Summary** for the mailing labels to be successful.

EXPORTING

It's possible to export the results of a search to an Excel document. After you do a search, select **Export Contacts** from drop-down - more actions - menu and click **Go**. You can either export primary contact fields or select fields for import, such as Mailings, and click **Continue**. Decide what fields to include in export, and click **Export** and the file will be downloaded in CSV (comma-separated value) format.

PATH: **Search** > **Export Contacts** > **Go** > *select fields* > **Continue** > *select fields* > **Export**.

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USING EVENTS

Events are physical, scheduled things that people sign up for and attend, such as conferences, trainings, canvasses, fundraisers, etc. Deal with event-related data in CiviEvent. Create a new event by clicking **New Event** and you'll be taken through the event setup wizard. **Manage Event** will let you configure the event information and settings, whether registration can happen online, as well as delete or disable the event. You can also **Find Participants** or **Import Participants** attending a given event, and **Manage Price Sets** if there are multiple registration options with associated registration fees.

PATH: **CiviEvent** > *select options*

USING ACTIVITIES

Activities are “interactions with contacts”, including phone calls, volunteer time, donations, and more. You can also define your own activities. You can view a contact's activity history by navigating to a particular contact through **Search** and selecting the **Activity** tab.

Clicking on **New Activity** in the left menu is a quick way to add activities. Just specify activity details and click **Save**. To add an activity to more than one contact, you can perform a search on contacts. Once you've clicked on the contacts you want to add the activity to, choose **Selected records only** and pick **Record Activity for Contacts** from the drop-down - more actions - menu. Click **go** and you'll be able to define the activity details on the next screen. Click **Save**.

PATH: *Follow search steps* > **Selected records only** > **Record Activity for Contacts** > **Go** > **Save**.