

What's New in PowerBase

In this latest PowerBase upgrade, we've updated your PowerBase to CiviCRM version 4.6.9, which includes new security and bug fixes, new features, and changes to the interface. The new changes that are highlighted in this document and will be of interest to you are:

- PowerBase changes to the **Advanced Search** interface
- CiviCRM changes to the **Mailings interface** that streamlines the mass email setup process
- CiviCRM's new **A/B testing** functionality in the **Mailings feature** that helps get the best email version out to your audience
- CiviCRM's new **repeating (recurring) events** functionality for scheduling ongoing events
- CiviCRM's new **repeating (recurring) activities** functionality for scheduling ongoing activities
- CiviCRM's changes to the **Reports interface** to ease the process of setting up custom reports

Interface Changes to Advanced Search

We made some small changes to the look of the **Advanced Search** screen we hope will help make this feature a bit more intuitive when setting up your searches.

Home » CiviCRM » Find Contacts

Advanced Search

▼ Search Criteria ?

▼ Basic Criteria

Display Settings
Choose how you want the search results displayed.

Search Views ?
Search View: Name Address... ▼

Display Results As ?
Contacts ▼

Search Criteria

Complete OR Partial Name

Complete OR Partial Email

Search Operator ?
 AND OR

Search in Trash (deleted contacts)

Contact Type(s)

Group(s) (search by group type)

Select Tag(s)

All Tags ?

Phone Number

Phone Location
- any - ▼

Phone Type
- any - ▼

Punctuation and spaces are ignored.

Exclude Include by Privacy Option(s) ?

Preferred Communication Method
 Phone Email Postal Mail SMS Fax
 Email On Hold

Here's what we changed:

- The **Display Settings** area is now moved to the top of the Advanced Search screen where you can decide to select EITHER a **Search View** option OR a **Display Results As** option to control the kinds of information you want to display as a result of your search
- In the **Search Criteria** area, the **Search Operator** radio button and the **Search in Trash** checkbox will remain just to the left of the **SEARCH** button, since these options are criteria that help fine tune your search results

To learn more details about how use **Advanced Search** and tips on searching, check out these resources on our Power On Network site here: <http://network.progressivetechnology.org/forum/66>

Updates to the Mailings (mass email) interface

CiviCRM updated the **Mailings interface** to help streamline the process of creating and setting up a mass mailing. The **Mailings** feature no longer uses a Wizard style process, where you move through the mailing creation process in a step-by-step fashion by clicking the NEXT button.

The screenshot displays the CiviCRM interface for creating a mailing. At the top, a navigation bar includes links for Contributions, Mailings, Events, Memberships, Campaigns, Reports, Administer, Support, CiviMobile, and Quick Entry. The main header shows 'CiviCRM' and a progress indicator with two steps: '1. Define Mailing' (active) and '2. Review and Schedule'. Below the header, there are tabs for 'Mailing', 'Attachments', 'Header and Footer', 'Publication', 'Responses', and 'Tracking'. The 'Mailing' tab is selected, showing a form with the following fields:

- Mailing Name***: Text input field containing 'Mailing Name'.
- Campaign**: Dropdown menu with 'Select Campaign' and a search icon.
- Template**: Dropdown menu with 'Message Template' and a refresh icon.
- From***: Dropdown menu with '"Neighbors for Justice" <info@progressivetechnology.org>'.
- Recipients***: Dropdown menu with 'Groups or Past Recipients' and a refresh icon. A yellow box next to it says 'No recipients'.
- Subject***: Text input field containing 'Subject'.

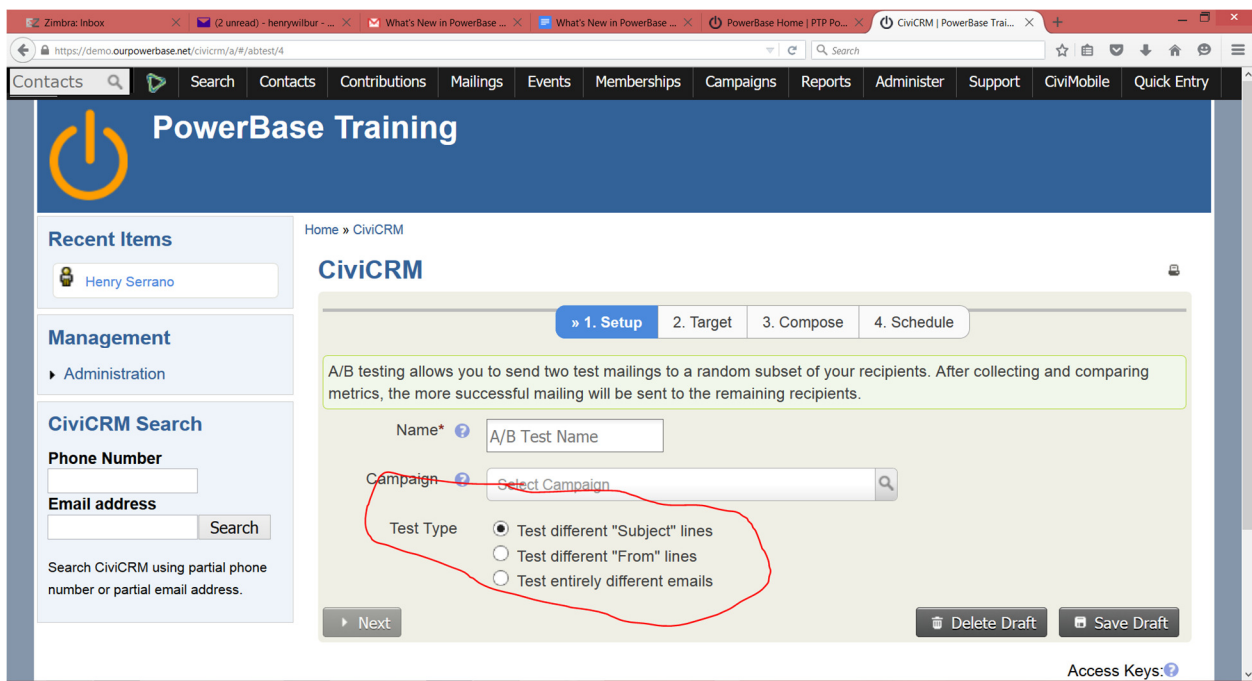
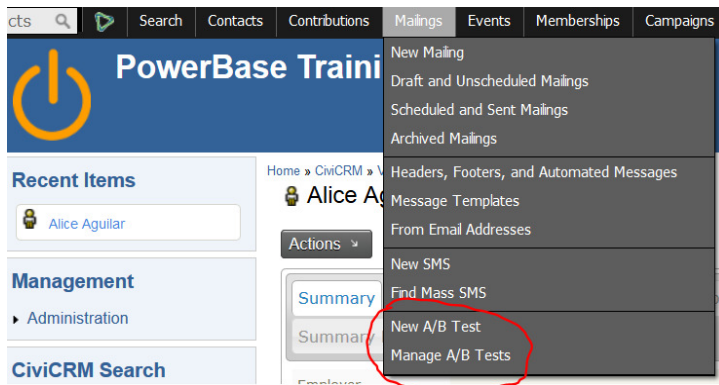
Below the form is an HTML editor with a toolbar containing icons for undo, redo, bold, italic, underline, strikethrough, bulleted list, numbered list, link, unlink, image, table, table border, source, and tokens. The editor area shows the HTML code 'body p'. Below the editor is a 'Plain Text' section. At the bottom, there is a 'Preview' section with a placeholder '(No content to preview)'. To the right of the preview are two 'Send test' buttons, one for 'Send test email to:' (with 'alice@progressivetechnology.org' entered) and one for 'Send test email to group:' (with a 'Select Group' dropdown menu). At the very bottom, there are 'Next', 'Delete Draft', and 'Save Draft' buttons.

The new interface, now uses a “tab” interface where you can click on any tab at any time and fill in the information you only need that is specific to the mailing. Basically there’s only one NEXT button, where your mailing can be scheduled for later or sent immediately.

To learn more details on tips and how create mailings in PowerBase, check out the resources on our Power On Network site here: <http://network.progressivetech.org/forum/65>

A/B testing: New Mailings (Mass Email) Feature

CiviCRM added the new **A/B testing feature** that allows you to send two test emails to a random sample of your targeted email recipients where you can select what you’d like to test - different subject lines, different “FROM” lines, or entirely different emails. Once the test mailing completes, you can review the results (or metrics) of the mailing and then decide which email you’d like to send to the remaining email recipients.



To learn more details about how use and set-up a mailing for A/B testing, go here:
<http://gitbook.civCRM.org/email/civimail-ab-testing.html>

Repeating (Recurring) Events

If your organization has regular, ongoing events, such as a monthly meeting or training, you can schedule the event for the span of the meetings. You can set an Event to repeat on a certain day and time with a specific end date and include dates to exclude from the repetition.

Home » CiviCRM » CiviEvent Dashboard » Manage Events

Configure Event - Monthly Meeting September 2015

Event Links ▾ Find Participants ▾ ?

Info and Settings Event Location Fees Online Registration Schedule Reminders Tell a Friend Personal Campaigns **Repeat**

Repeat Event

Save Cancel

Repetition Start Date 09/07/2015 Time 06:00PM *

Repeats every * 1 month

Repeats by ?
 day of the month 1
 day of the week First Mon

Ends * ?
 After 6 occurrences
 On

Exclude Dates ?

Save Cancel

To learn more details about how use and set-up recurring events, go here:
<http://gitbook.civCRM.org/events/repeating-events.html>

To find more about creating and using events in PowerBase, check out the resources on our Power On Network site here: <http://network.progressivetech.org/forum/72>

Repeating (Recurring) Activities

You can now set an Activity to repeat itself (for example, once a week or once a month). You can set an activity to repeat on a certain day and time with a specific end date and include dates to exclude from the repetition.

The screenshot shows the 'New Activity' form in CiviCRM. The 'Repeat Activity' section is highlighted with a red circle. It contains the following fields and options:

- Repetition Start Date: [Text input with calendar icon]
- Time: [Text input]
- Repeats every: 1 [dropdown] week [dropdown]
- Repeats on: Sun Mon Tue Wed Thu Fri Sat
- Ends: After 2 [dropdown] occurrences
- On [Text input]
- Exclude Dates: [Text input with dropdown arrow]

To learn more about recurring activities and using activities in general, go here:
<http://gitbook.civicrm.org/organising-your-data/activities.html>

Interface Changes to Reports

CiviCRM updated the **Reports interface** to use tabs to group the kinds of information and how you would like to display the information on your custom report, such as the columns of information, criteria (filters), sorting preferences, etc, when you choose to view or edit an existing report or create a new report from a template. These tabs will contain different options of information for criteria or display based on the specific kind of report you want to create.

The following are examples of the interface changes using the Event Participant Report (List) and the specific tabs of information available to you to create or edit your report.

Here is an example of the interface changes when you choose to view or edit an existing report:

Home » CiviCRM » CiviReport

Event Participant Report (List)

Columns | Sorting | Display Options | Filters | Title and Format | Email Delivery | Access

Preview Report | Update Report | Save a Copy...

Print Report | PDF | Export to CSV | Add Contacts to Group

Next > Last >> Records 1 - 50 of 6824 Page 1 of 137

Participant Name	Event	Status	Role
Aaron, Lillie	View First Lead Event	Attended	Attendee
Aaron, Lillie	View Nov 15 EVENT TEST IG	Attended	Attendee
Aaron, Lillie	View Nov 15 EVENT TEST IG	Registered	Attendee
Aaron, Lillie	View Budget Meeting November 2011 (Training)	Attended	Attendee
Aaron, Lillie	View Budget Meeting November 2011 (Training)	Attended	Attendee

Here is an example of the interface changes when you choose to create a new report from a template:

Home » CiviCRM » Report Templates

Event Participant Report (List) - Template

Columns | Sorting | Display Options | Filters

Participant Name

Middle Name

Email Greeting

Gender

Organization Name

Email

State/Province

Participant ID

Fee level

Balance

Financial Type

Contribution Source

Contact Prefix

Last Name

Address Greeting

Birth Date

Contact identifier from external system

Street Address

Country

Event

Fee Amount

Campaign

Payment Date

Transaction ID

First Name

Contact Suffix

Contact Type

Age

Age at Event

City

Phone

Status

Registration Date

Event Type

Contribution Status

Transaction Fee

Nick Name

Postal Greeting

Contact Subtype

Contact Job title

Contact ID

Postal Code

Role

Total Paid

Event Start Date

Payment Type

Net Amount

Communication Details

Demographics

Constituent Info - Individuals

Grassroots Info

To find more about creating and using reports in PowerBase, check out the resources on our Power On Network site here: <http://network.progressivetech.org/forum/73>

To learn more about Reports in general from CiviCRM with the interface changes, go here <http://gitbook.civicrm.org/reporting/index.html>