

PowerBase Advanced Track Training Table of Contents

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PROGRESSIVE TECHNOLOGY PROJECT

Customizing Your PowerBase

What we'll cover:

- How to add a custom field
- Cautionary word about new contact subtypes/custom field sets

I want to collect some data in PB that we don't have a field for yet.

I want to track which journals/publications/news outlets our media contacts contribute to.

- First, some vocab....
 - Custom Field
 - Custom Field Set
 - Contact subtype

Think first about *where* the new custom field belongs.

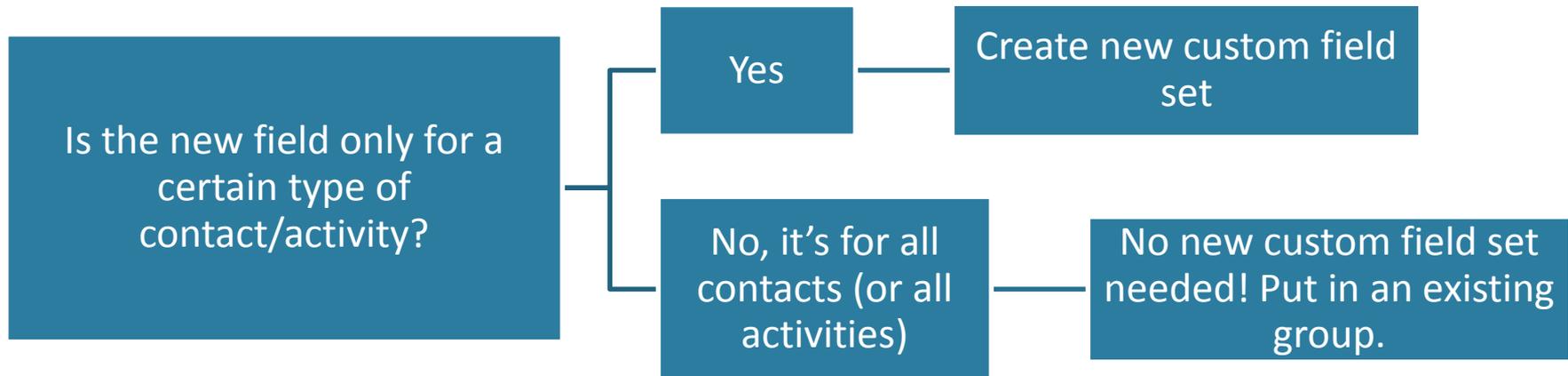
- Is there an existing custom field set where it can live?
- Does it belong with all contacts?
- If it's an activity field, does it belong to all activities?

Custom Data

Custom data is stored in custom fields. Custom fields are organized into logically related custom data sets (e.g. Volunteer Info). Use custom fields to collect and store data on forms. You can create one or many sets of custom fields. ([learn more...](#))

Set	Enabled?	Used For	Type	Order	Style	
Communication Details	Yes	All Contact Types	Any	↓ ↓	Inline	↘
Constituent Info - Individuals	Yes	Individual	Any	↕ ↑ ↓ ↓	Inline	↘
Grassroots Info	Yes	Individual	Any	↕ ↑ ↓ ↓	Inline	↘
Demographics	Yes	Individual	Any	↕ ↑ ↓ ↓	Tab	↘
Voter Info	Yes	Individual	Any	↕ ↑ ↓ ↓	Tab	↘
Constituent Info - Organizations	Yes	Organization	Any	↕ ↑ ↓ ↓	Inline	↘
Proposal Info	Yes	Activities	Proposal	↕ ↑ ↓ ↓	Inline	↘
Participant Info	Yes	Participants	Any	↕ ↑ ↓ ↓	Inline	↘
Event Details	Yes	Events	Any	↕ ↑ ↓ ↓	Inline	↘
Organizational Details	Yes	Organization	Any	↕ ↑ ↓ ↓	Inline	↘
Media Outlet Info	Yes	Organization	Media Outlet	↕ ↑ ↓ ↓	Inline	↘
Media Info	Yes	Individual	Media Contact	↕ ↑ ↓ ↓	Inline	↘
Funder Info	Yes	Individual	Funder Contact	↕ ↑ ↓ ↓	Inline	↘
Elected Official Info	Yes	Individual	Elected Official	↕ ↑ ↓ ↓	Inline	↘
Membership Info	Yes	Memberships	Family Membership	↕ ↑ ↓ ↓	Inline	↘
Phonebank questions	Yes	Activities	PhoneBank	↕ ↑ ↓ ↓	Inline	↘
Real PB fields	Yes	Activities	Real Phonebanking	↕ ↑ ↓ ↓	Inline	↘
Grant Info	Yes	Organization	Foundation	↕ ↑ ↓ ↓	Inline	↘
Summary Fields	Yes	All Contact Types	Any	↕ ↑	Tab	↘

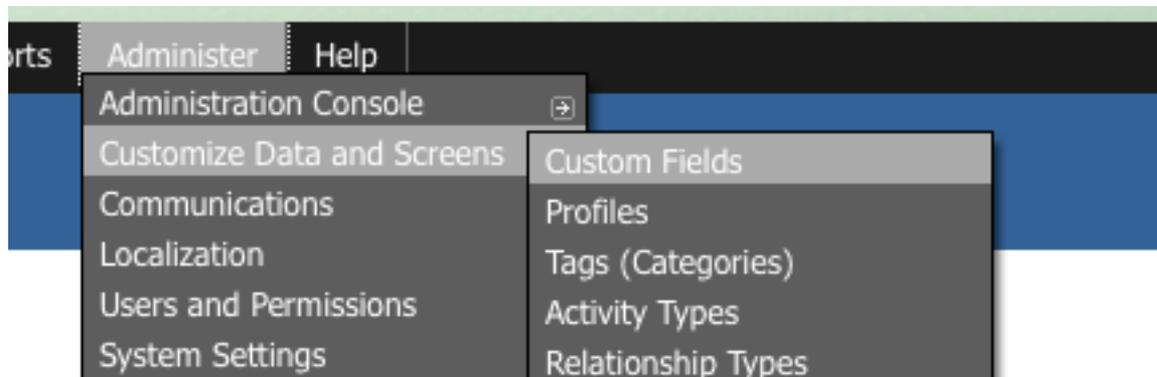
[+ Add Set of Custom Fields](#)



Pro tip:

Most of the time, you won't need to add a whole new custom field set.

Administer > Customize Data and Screens > Custom Fields



Custom Data

Custom data is stored in custom fields. Custom fields are organized into logically related custom data sets (e.g. Volunteer Info). Use custom fields to collect and store data in forms. You can create one or many sets of custom fields. ([learn more...](#))

Set	Enabled?	Used For	Type	Order	Style
Communication Details	Yes	All Contact Types	Any	↓ ↓	Inline
Constituent Info - Individuals	Yes	Individual	Any	↑ ↓ ↓	Inline
Grassroots Info	Yes	Individual	Any	↑ ↓ ↓	Inline
Demographics	Yes	Individual	Any	↑ ↓ ↓	Tab
Voter Info	Yes	Individual	Any	↑ ↓ ↓	Tab
Constituent Info - Organizations	Yes	Organization	Any	↑ ↓ ↓	Inline
Proposal Info	Yes	Activities	Proposal	↑ ↓ ↓	Inline
Participant Info	Yes	Participants	Any	↑ ↓ ↓	Inline
Event Details	Yes	Events	Any	↑ ↓ ↓	Inline
Organizational Details	Yes	Organization	Any	↑ ↓ ↓	Inline
Media Outlet Info	Yes	Organization	Media Outlet	↑ ↓ ↓	Inline
Media Info	Yes	Individual	Media Contact	↑ ↓ ↓	Inline
Funder Info	Yes	Individual	Funder Contact	↑ ↓ ↓	Inline
Elected Official Info	Yes	Individual	Elected Official	↑ ↓ ↓	Inline
Membership Info	Yes	Memberships	Family Membership	↑ ↓ ↓	Inline
Phonebank questions	Yes	Activities	PhoneBank	↑ ↓ ↓	Inline
Real PB fields	Yes	Activities	Real Phonebanking	↑ ↓ ↓	Inline
Grant Info	Yes	Organization	Foundation	↑ ↓ ↓	Inline
Summary Fields	Yes	All Contact Types	Any	↑	Tab

+ Add Set of Custom Fields

Add a new custom field to an existing **Custom Field Set**:

Event Details	Yes	Events	Any	↑ ↓	Inline	View and Edit Custom Fields Preview more ▶
Organizational Details	Yes	Organization	Any	↑ ↓	Inline	View and Edit Custom Fields Preview more ▶
Media Outlet Info	Yes	Organization	Media Outlet	↑ ↓	Inline	View and Edit Custom Fields Preview more ▶
Media Info	Yes	Individual	Media Contact	↑ ↓	Inline	View and Edit Custom Fields Preview more ▶
Funder Info	Yes	Individual	Funder Contact	↑ ↓	Inline	View and Edit Custom Fields Preview more ▶

Media Info - Custom Fields

◆ Field Label	◆ Data Type	◆ Field Type	▲ Order
Media Type - Ind	Alphanumeric	CheckBox	
Beat	Alphanumeric	CheckBox	⌵ ⬆
Media Issue Interest	Alphanumeric	CheckBox	⌵ ⬆

 Add Custom Field



Add a new custom field for your special contact subtype.

Media Info - Custom Fields

Field Label *

Data and Input Field Type

Select the type of data you want to collect and store for this contact. Then select from the available HTML input field types (choices are based on the type of data being collected).

Database field length

Option Type Create a new set of options
 Reuse an existing set

You can create new multiple choice options for this field, or select an existing set of options which you've already created for another custom field.

Multiple Choice Options

Enter up to ten (10) multiple choice options in this table (click 'another choice' for each additional choice). If you need more than ten options, you can create an unlimited number of additional choices using the Edit Multiple Choice Options link after saving this new field. If desired, you can mark one of the choices as the default choice. The option 'label' is displayed on the form, while the option 'value' is stored in the contact record. The label and value may be the same or different. Inactive options are hidden when the field is presented.

	Default	Label	Value	Weight	Active?
	<input type="checkbox"/>	<input type="text" value="Daily Star"/>	<input type="text" value="Daily Star"/>	<input type="text" value="1"/>	<input checked="" type="checkbox"/>
▼	<input type="checkbox"/>	<input type="text" value="Pioneer Press"/>	<input type="text" value="Pioneer Press"/>	<input type="text" value="2"/>	<input checked="" type="checkbox"/>
▼	<input type="checkbox"/>	<input type="text" value="Huffington Post"/>	<input type="text" value="Huffington Post"/>	<input type="text" value="3"/>	<input checked="" type="checkbox"/>

Bottom half of new custom field page. Decide whether the field is required, searchable, or needs “help” text for people filling it out.

Order * Weight controls the order in which fields are displayed in a group. Enter a positive or negative integer - lower numbers are displayed ahead of higher numbers.

Field Pre Help

Field Post Help

Explanatory text displayed on back-end forms. Pre help is displayed inline on the form (above the field). Post help is displayed in a pop-up - users click the help balloon to view help text.

Required?
Do not make custom fields required unless you want to force all users to enter a value anytime they add or edit this type of record. You can always make the field required when used in a specific Profile form.

Is this Field Searchable?
Can you search on this field in the Advanced and component search forms? Also determines whether you can include this field as a display column and / or filter in related detail reports.

Active?

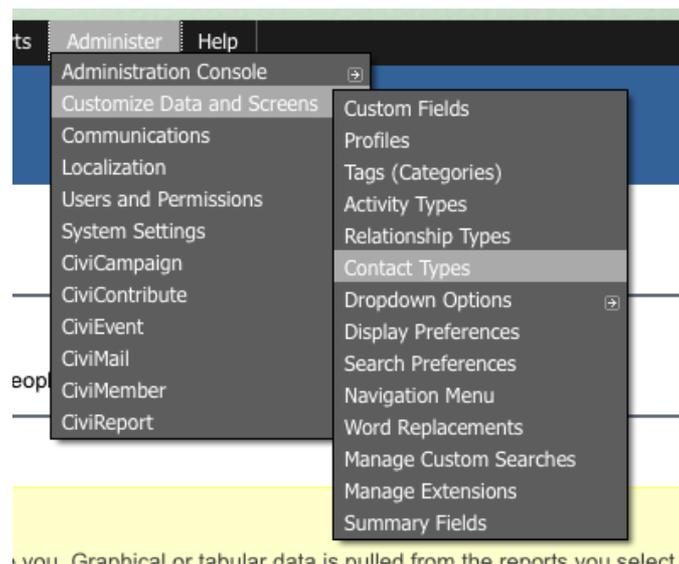
View Only? Is this field set by PHP code (via a custom hook). This field will not be updated by CiviCRM.

Is the new field *ONLY* for a certain type of contact (or activity)?

If you answered YES, then

- 1) create a new contact type and
- 1) add a new custom group that's associated with that contact type.

Add a new type of Individual: Day Laborer



Contact Types

CiviCRM comes with 3 basic (built-in) contact types: Individual, Household, and Organization (Parent, Staff, and /or Volunteer types from the basic Individual type...). ?

◆ Contact Type	◆ Based On
Individual	(built-in)
Household	(built-in)
Organization	(built-in)
Media Contact	Individual
Funder Contact	Individual
Elected Official	Individual
Media Outlet	Organization
Foundation	Organization

+ Add Contact Type

Contact Types

CiviCRM comes with 3 basic (built-in) contact types: Individual, Household, and Organization. You can create additional contact types based on Parent, Staff, and /or Volunteer types from the basic Individual type...). ?

New Contact Type

Name *

Basic Contact Type

Image URL ?

Description

Enabled?

Add a new set of custom fields and link it to the Day Laborer contact subtype.

New Custom Field Set

Use Custom Field Sets to add logically related fields for a specific type of CiviCRM record (e.g. contact records, contribution records)

Set Name * ?

Used For * ?

- Any -
- Media Contact
- Funder Contact
- Elected Official
- Day Laborer

Order * ?

Does this Custom Field Set allow multiple records? ?

Display Style ?

Collapse this set on initial display ?

Collapse this set in Advanced Search ?

Is this Custom Data Set active?

Pre-form Help ?



How it looks in a contact record:

▼ Constituent Info - Individuals

Constituent Type	Member
Other Name	
Staff Responsible	
Date Started	May 15th, 2013
How Started	

▼ Day Laborer Information

Skills	Painting, Operating heavy equipment
--------	-------------------------------------

- It seems glamorous and sophisticated to have special contact subtypes.
- But don't add 'em unless you're going to use them.

Petitions: Sending Email to a Target

The Petition module has a function that allows the petition signer to send an email to the campaign target.

Initial Setup

The module needs to be enabled by a PowerBase Administrator. From the left column of the home screen under **Management**, click **Administration**, then select **Modules**. Scroll down to the CiviCRM section and check the box for the **CiviCRM Petition Email** module. Scroll to the bottom and click the Save button. You will only need to do this once.

Next, you need to create a custom field that holds the email message that an individual can send to a target. Click **Administer -> Custom Data and Screens -> Custom Fields**. Scroll to the bottom and click on **Add Set of Custom Fields**. Set Name: *Email Target*, Used For: Activities, Petition. Click Save. Now create a field: Field Label: Target Message, Data and Input Field Type: Note. Click Save. You will only need to do this once.

Now you need to create a Profile, with this field you just created in it. Click **Administer -> Customize Data and Screens -> Profiles**. Click Add Profile. Profile Name: Email Target. Click Save. Field Name: Activity, Target Message. Click Save.

Creating a Petition with a Target Email Function Enabled

Click on Campaigns -> New Petition to start a petition.

Give your petition a Title. Add some introductory text and pictures. Choose a Contact Profile. This should be a Profile that has all the fields that you are asking people to give about themselves: Name, Phone, Email, etc. FYI, Primary email is required.

For Activity Profile, choose the *Email Target* profile

Fill in the Thank You page Title and Text.

Check Bypass email confirmation, unless you want people to have to go through a second step of opening their email and clicking to confirm their email address before PowerBase sends the email to the target.

Check Send an email to a target. Now you have some additional options. Fill in the name and email address of the person you are targeting. Note, it's a good idea to initially use a test email address that you have access to so that you can review how your messages will appear in the Target's email. Save the Petition and reopen it to edit it. Choose the Custom Message Field, which should be the Target Message field that was added to the *Email Target* Activity Profile.

Petitions: Sending Email to a Target

Set up the Default Message - create the default email text that you want to offer to signers. They will have a chance to edit it.

Set the Email Subject Line – This is the email subject line that all emails sent through this petition will get. Petition signers will not be able to edit this.

To test, go to the page that lists all your petitions. You can click Campaigns -> Dashboard and choose Petitions. Click the "more" button on the far right for your petition. Right-click on "Sign" and Copy the Link Address. Open a different browser, where you are not logged into PowerBase, and paste the link to the petition. You can only sign a petition once. Once you are done testing, go back and set the Target's email address to the correct one.

Spreadsheet Tips

Data -> Text to Columns...

Very useful for separating data from one column into two. The easiest example is having Last, First. You can use Text to Columns by identifying the comma as the Delimiter, causing the column to be broken into two columns without the comma.

Functions

After you use a function in a spreadsheet, you will need to copy the data and paste special just the values in each cell. This is how you get rid of your formula and just keep the data.

Function: PROPER

Formula: =PROPER(A1)

This is what you use if you have all UPPERCASE and want to change it to capitalize the first letter of every word.

= PROPER() capitalises the first letter of each word (like Title Case)

= UPPER() - forces all letters to be UPPER CASE

= LOWER() - forces all letters to be lower case

If you want to capitalize only the First letter of a sentence use this formula

=UPPER(LEFT(A2,1))&LOWER(RIGHT(A2,LEN(A2)-1))

Function: VLOOKUP

Formula: =VLOOKUP(lookup_value, table_array, col_index_num, range_lookup)

By far my most used formula. The official description of what it does: "Looks for a value in the leftmost column of a table, and then returns a value in the same row from a column you specify...".

Basically, you define a value (the lookup_value) for the formula to look for. It looks for this value in the leftmost column of a table (the table_array).

Function: TRIM

Formula: =TRIM(A1)

Spreadsheet Tips

Gets rid of any space in a cell, except for single spaces between words. I've found this formula to be extremely useful because I've often run into situations where you pull data from a database and for some reason extra spaces are put in behind or in front of legitimate data. This can wreak havoc if you are trying to compare using IF statements or VLOOKUP's.

Function: RIGHT, LEFT, MID

Formulas: =RIGHT(text, number of characters), =LEFT(text, number of characters), =MID(text, start number, number of characters).

(Note: In all of these formulas, wherever it says "text" you can use a cell reference as well)

These formulas return the specified number of characters from a text string. RIGHT gives you the number of characters from the right of the text string, LEFT gives you the number of characters from the left, and MID gives you the specified number of characters from the middle of the word. You tell the MID formula where to start with the start_number and then it grabs the specified number of characters to the right of the start_number.

=UPPER(LEFT(A2,1))&LOWER(RIGHT(A2,LEN(A2)-1))

will capitalize only the First letter of a sentence.

Function: IF

Formula: =IF(logical_statement, return this if logical statement is true, return this if logical statement is false)

When you're doing an analysis of a lot of data in Excel there are a lot of scenarios you could be trying to discover and the data has to react differently based on a different situation.

Function: CONCATENATE

A fancy word for combining data in 2 (or more) different cells into one cell. This can be done with the Concatenate excel formula or it can be done by simply putting the & symbol in between the two cells. If I have "Juan" in cell A1 and "Hernan" in cell B1 I could put this formula: =A1&" "&B1 and it would give me "Juan Hernan". (The " " puts a space in between what you are combining with the &). I can use =concatenate(A1, " ", B1) and it will give me the same thing: "Juan Hernan"

Spreadsheet Tips

Preparing a Profile Form for Online Event Registration Signup, Contributions or to Collect Email addresses

Introduction

To collect information from your web site, you have to tell PowerBase what fields you would like to collect. For example, if you'd like to send newsletters to supporters, you'll need to collect email address, at minimum, and first name and last name and possibly an address field such as zip code. Your set of fields might look like this:

First Name
Last Name
E-mail address
Home Zip code

If you're collecting registrations for a fundraising dinner, you might need to collect additional information such as the full street address and dietary preferences. Some of this data might not be predefined as part of PowerBase. In that case, you'll will have to create custom fields. It's outside the scope of this document to describe the best practices for creating custom fields.

We refer to any data collected from your external public-facing pages that appear on your web site or directly on your PowerBase site as "on-line", "public", or "external" and data input by you or your colleagues who have logged in as "off-line", "User and User Admin Only", or "internal". Of course, all of it is online, but this is a convenient way to separate out pages that you are preparing for the general public and pages that will be used internally.

Once you define the information you would like to collect, you will need to create a "**profile**". **Profile is an arrangement of one or more data fields that are in your database.** Profiles can be used to collect new data, change field data or to display data. Profiles can contain information from the contact table, the event participant table, the activity table, the membership table or the contribution table. You may combine fields from the contact table (individuals or organizations are stored in the contact table) and optionally one of the other tables. You cannot make any other combination of tables in a profile at this time, nor can you put organization and individual information on the same profile.

Since this document is all about public profiles, we won't be describing all the other ways that you can use profiles, which include Batch Update via Profile, showing different Search Results in Advanced Search, and for simplified Data Entry screens.

This section draws on information from the CiviCRM manual. This section covers profiles: <http://book.civicrm.org/user/current/organising-your-data/profiles/>

Preparing a Profile Form for Online Event Registration Signup, Contributions or to Collect Email addresses

Orientation

If you have Administer menu access, you can create the profile going to **Administer>Customize Data and Screens>Profiles**.

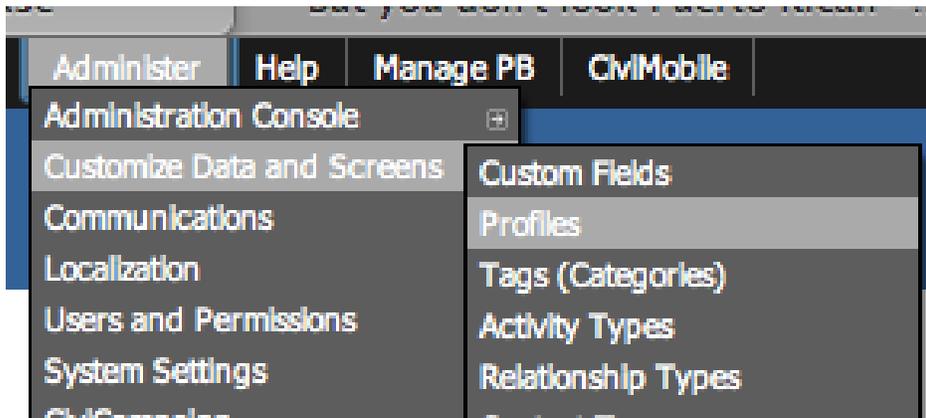


Figure 1 Finding the Profile Menu

You will come to another screen that allows you to add or update an existing profile. It has two tabs: **User-defined Profiles** and **Reserved Profiles**. We are interested in the User-defined Profiles for this document, but from time to time knowing where the Reserved Profiles are stored can come in handy for changing some default settings.

Home » CiviCRM » Administer CiviCRM

Profiles

CiviCRM Profile(s) allow you to aggregate groups of fields and include them in your site as input forms, contact display pages, and search and listings features. They provide a powerful set of tools for you to collect information from constituents and selectively share contact information. ?

+ Add Profile

User-defined Profiles Reserved Profiles

Profile Title	Type	ID	Used For	Fields	Settings	more ▶
Name and Address	Individual, Contact	1	Standalone Form or Directory, CiviEvent, Search Views, View/Edit Drupal User Account, CiviEvent_Additional	Fields	Settings	more ▶
Update Contact Information	Individual, Contact	3	Standalone Form or Directory, CiviEvent, CiviEvent_Additional	Fields	Settings	more ▶
Update Grassroots Info	Individual, Contact	4	Standalone Form or Directory	Fields	Settings	more ▶
Participant Dietary & Lodging Info	Participant	5	Standalone Form or Directory, CiviEvent, CiviEvent_Additional	Fields	Settings	more ▶

Figure 2 The Profile Selection Page

The list includes the **Profile Title** which is name of the profile which, by the way, is used on Public facing pages as the heading above the fields,

Preparing a Profile Form for Online Event Registration Signup, Contributions or to Collect Email addresses

Type, which indicates which tables are being used,

ID is very important. It's used to differentiate among all the profiles that you have. You need to know it in many cases for external web form use.

Used for, which shows the uses that it can have. On the right you have some options for modifying the profile.

Fields brings up the list of fields associated with the profile.

Settings changes the overall profile. It has fields like Profile Name (aka Profile Title), help text, and some other critical information.

The **more** option includes additional actions.

- **Preview** shows the entire profile.
- **Use Profile-Create Mode** will allow you to do data entry with the profile, if it's been set up for that.
- **Disable** makes the profile unavailable for use, but does not delete it.
- **Delete** *does* delete it. Deleting a profile will not delete any data in your database, but it may cause a problem if the profile is in use on an external page somewhere.
- **HTML Form Snippet** opens a page with html coding that can be copied and used in another web site. This is typically used in situations where your web site is collecting contact information such as name and email address for e-newsletter sign ups.
- **Copy Profile** will make a duplicate of the profile. This is a handy way to get started with a new profile. Just rename it after you get it duplicated.

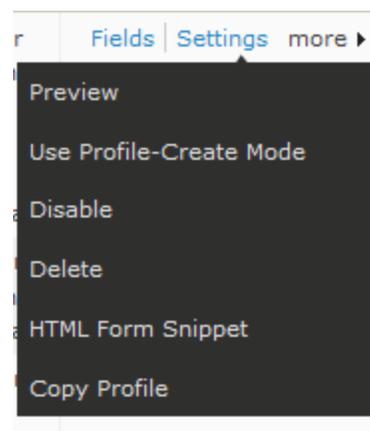


Figure 3 The more menu

Preparing for a Profile

Online profiles have some unique features that allow you to control such things as

- who gets informed when a profile is used,
- what data can appear in a list if you chose to display contacts in your database,
- what group should hold new contacts as they are entered,
- whether to update contact records or to add them as duplicates.

Preparing a Profile Form for Online Event Registration Signup, Contributions or to Collect Email addresses

We recommend creating a group *beforehand* that will hold the new entries that come into your database through the external site. You can do this with the **Contacts>New Group** menu option.

We also recommend that you add new contacts, even if they are duplicates. This prevents someone from overwriting existing data. The implication of these choices is that you will have to regularly monitor the entries that come in through the web site. This is easy if you have them being added to a group. We recommend that you move them out of that group once you've done your due diligence to make sure the data is accurate and conforms to your data protocols.

***Tip:** Pay attention to where your profiles are being used. They can be hard to track once they are put on a public page. The best practice is to copy, rather than change, an existing profile. This prevents you from accidentally breaking another site. Conversely, when a profile is no longer in use, Disable it so that it's clearly not available. Disabling also allows you to re-enable it if you find you've removed the wrong profile.*

Preparing a Profile Form for Online Event Registration Signup, Contributions or to Collect Email addresses

Profile Settings

me » CiviCRM » Administer CiviCRM » Profiles

Profile Settings - E-Newsletter Sign-up

The screenshot shows the 'Profile Settings - E-Newsletter Sign-up' page. At the top, there are 'Save' and 'Cancel' buttons. Below them is a 'View or Edit Fields for this Profile' button. The 'Profile Name' field is set to 'E-Newsletter Sign-up'. The 'Used For' section has four checkboxes: 'Standalone Form or Directory' (checked), 'Search Views', 'Drupal User Registration', and 'View/Edit Drupal User Account'. The 'Order' field is set to '11'. There are two 'Pre-form Help' and 'Post-form Help' sections, each with a rich text editor containing the text 'SIGN UP TO RECEIVE E-ALERTS HERE'. At the bottom, there is a checkbox 'Is this CiviCRM Profile active?' which is checked. A blue bar at the very bottom contains a link to 'Advanced Settings'.

Figure 4 Profile Settings - Basic Settings

The Profile Settings is the first page you come to when adding a profile. It contains critical information about the profile and it allows you to add some instructional text with web formatting.

Profile Name: Select this text thoughtfully. It will be the heading above the fields on your external page.

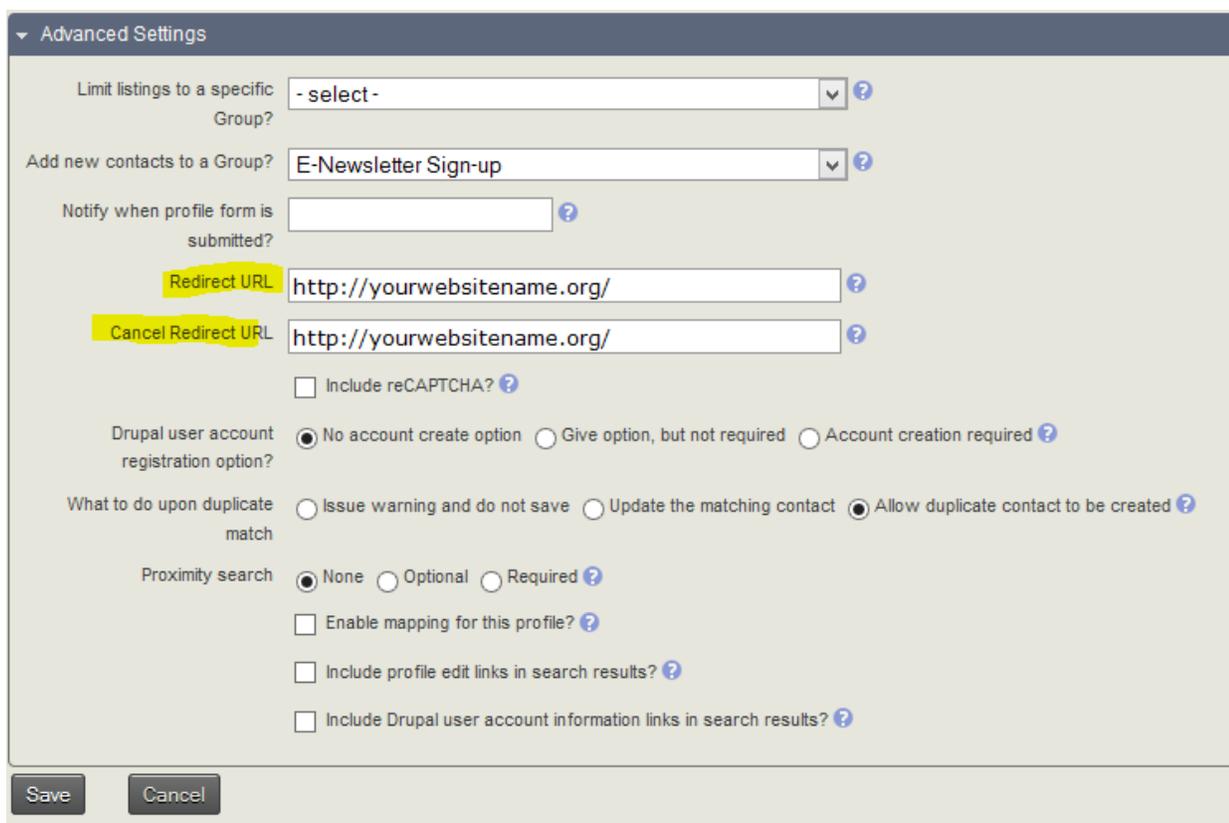
Note the tiny question mark with a circle around it. Click on that to get specific instructions for the section you are in.

Preparing a Profile Form for Online Event Registration Signup, Contributions or to Collect Email addresses

Pre-form Help: What you enter here will appear above your profile fields on the external page. You can adjust the fonts and add images to it.

Post-form Help: What you enter here will appear below your profile fields on the external page. You can adjust the fonts and add images to it as well.

You have to click the triangle next to **Advanced Settings** to open up this dialog section:



The screenshot shows the 'Advanced Settings' dialog box with the following options:

- Limit listings to a specific Group? - select -
- Add new contacts to a Group? E-Newsletter Sign-up
- Notify when profile form is submitted? (empty field)
- Redirect URL: http://yourwebsitename.org/
- Cancel Redirect URL: http://yourwebsitename.org/
- Include reCAPTCHA?
- Drupal user account registration option? No account create option Give option, but not required Account creation required
- What to do upon duplicate match? Issue warning and do not save Update the matching contact Allow duplicate contact to be created
- Proximity search? None Optional Required
- Enable mapping for this profile?
- Include profile edit links in search results?
- Include Drupal user account information links in search results?

Buttons: Save, Cancel

Figure 5 Profile Settings - Advanced Settings

Advanced Settings is the place where some crucial settings are made.

Limit listings to a specific group? In almost all cases you do not select a group. This is designed for publishing member lists and isn't often required.

Add new contacts to a Group? We recommend always adding new contacts that come from the web side of the world to a group. It helps you keep track of what's coming into your database.

Preparing a Profile Form for Online Event Registration Signup, Contributions or to Collect Email addresses

Notify when profile form is submitted? Enter the email address(es) of people that should find out if the form has been used to create a contact. Depending on how your work is organized, this may not be necessary, but some groups do use it.

Redirect URL This is the web site address that the user will go to after completing the form. Typically it's the home page of your web site.

Cancel Redirect URL This is the web site address that the user will go to if they cancel out of entering the data. Typically it's the home page of your web site.

*A URL is the entire web address including the **http://** or **https://** portion. Failing to include the **http** section will cause a weird error to occur after a form is submitted.*

Include reCAPTCHA? This tool is a free service that helps prevent automated abuse of your site. To use it, you get a license from Google <https://www.google.com/recaptcha>. Then you enter your keys into your PowerBase set up. Go to **Administer>Administration Console**. In the **System Settings** Group, you'll find the ReCAPTCHA set up link.

Drupal user account registration option? Always select **No account create option**.

What to do upon duplicate match We recommend selecting **Allow duplicate contact to be created**

Proximity search Select **None**

Enable mapping for this profile? Leave unchecked

Include profile edit links in search results? Leave unchecked

Include Drupal user account information links in search results? Leave unchecked

Once you've completed the settings, press **Save** and you'll go on to add fields to your profile.

Preparing a Profile Form for Online Event Registration Signup, Contributions or to Collect Email addresses

Adding Fields in a Profile

E-Newsletter Sign Up - CiviCRM Profile Fields

Figure 6 Add a Field Page

You can get to this page by selecting the fields option next to a profile name. If adding a new profile, you'll automatically get to this page.

Field Name is where you pick the fields that you will put on your profile. You are given a choice of tables to work with. Once you select a table, you will get a list of fields. Contact table contains the fields that are common to Individuals and Organizations. Individuals and its contact subtypes contain information that applies to people. Organization and its contact subtypes contain organization information. For an e-newsletter, we'll be collecting name and email address so we'll show the screens involved.

Figure 7 Tables available

Preparing a Profile Form for Online Event Registration Signup, Contributions or to Collect Email addresses

Add Field

Save Save and New Cancel

Field Name Individual First Name
Select the type of CiviCRM record and the field you want to include in this Profile.

Field Label First Name

Required?

View Only?

Visibility * User and User Admin Only

Field Pre Help

Field Post Help

Order * 1

Active?

Save Save and New Cancel

Select **Individual**, then select **First Name**.

The **Field Label** will be loaded automatically but you can edit it afterwards.

Required? Select this check box to ensure that the user fills out this field.

View Only? Leave unchecked.

Visibility Leave at **User and User Admin Only**

Field Pre Help Use as needed. You can use html for this.

Field Post Help Use as needed. You can use html for this.

Order This controls where this field appears on the list of fields

Active? Identifies about whether this field name is active or not.

Repeat this process for last name. Now we'll look at entering the email address.

Preparing a Profile Form for Online Event Registration Signup, Contributions or to Collect Email addresses

E-Newsletter Sign Up - CiviCRM Profile Fields

Field Name: Contacts | Email | Web

Select the type of CiviCRM record and the field you want to include in this Profile.

Field Label: Email (Web)

Required?

View Only?

Visibility *: User and User Admin Only

Field Pre Help

Field Post Help

Order *: 1

Active?

To enter email address and street addresses, select the Contacts table then select the field. Fields like email, phone and address have a **Location type** associated with them. We recommend to not use Primary as the Location type since it actually is an *attribute* of Location type but isn't actually a Location type. If you use Primary, it generally will make the entry of the type Home. This can result in the good data being overwritten by questionable if not downright bad data. We recommend making a location type of "Web" or some such so that you know the information came in from your web site.

*You can create new Location types by going to **Administer > Administration Console**. Look in the **Customize Data and Screens** section for » **Location Types (Home, Work...)***

Using Your Profile

Once you've built your profile, you can use for data entry in Events Online Registration or the Include Profiles of a Contribution Page. The "html Snippet" can be inserted in your web page by someone with permission to access and change your web site.

How to Assign a Theme to a Petition

Themes

Themes are the way that PowerBase is modified to look like your web site(s). A theme is a “skin” put over a public facing PowerBase page to make it look like your web site.

Progressive Technology Project’s PowerBase team usually creates a theme for your PowerBase that matches your main web site when your system is set up. In some cases, organizations have more than one web site – sometimes there will be a web site for a particular campaign; other times to support a sister organization with a different legal status.

This document explains how to modify a theme for a specific petition. If your organization has a need for only one theme, you won’t need this document. This document is written with the assumption that your organization has already had two or more themes created for it by PTP and that the petition being posted needs a different theme attached to it.

Getting Ready

Before starting this task, you need two things:

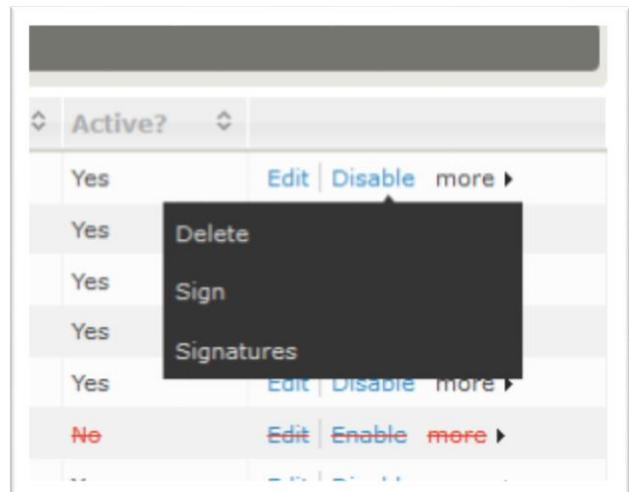
1. Confirm with PowerBase Support that your themes have been installed and set up for petitions and
2. You will need the number of the petition that you are creating the theme for.

When you talk to PowerBase Support, make sure you get the names of the themes installed on your site and get a clear understanding of which theme connects to which of your web sites or campaigns.

To get the petition number, go to your petition dashboard by going to Campaigns->Dashboard->Petitions.

On the row that your petition is on, click on the “more” option and you’ll see a menu like this.

Select “Sign” and you’ll open the petition. Look in the top of your browser window for the line beginning with “https://”. You’ll see something like the following with the word “SITE” replaced with your PowerBase name:



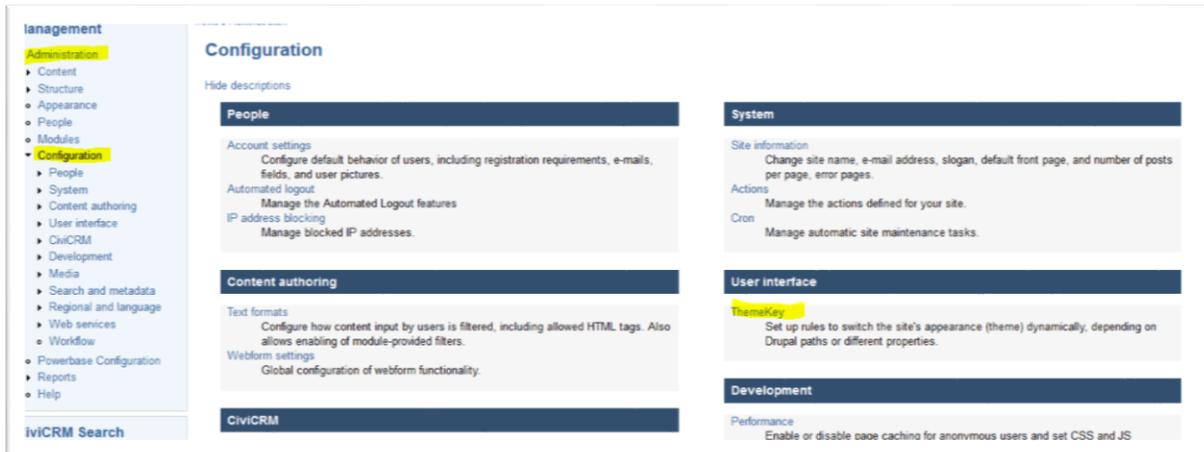
<https://SITE.ourpowerbase.net/civicism/petition/sign?sid=11&reset=1>

To the right of that, you’ll see the letters “sid=”. Right after those letters is your petition number. Remember it because you’ll need it later.

How to Assign a Theme to a Petition

Accessing the Theme Configuration Menu

Themes are configured from the Administration menu. If you are a PowerBase Administrator, you'll have an "Administration" option under "Management" on your left column. Click "Configuration" and you'll get the screen below. Click on "Themekey" to get to the configuration menu.



You can also get to it by going to this url:

<https://SITE.ourpowerbase.net/admin/config/user-interface/themekey>

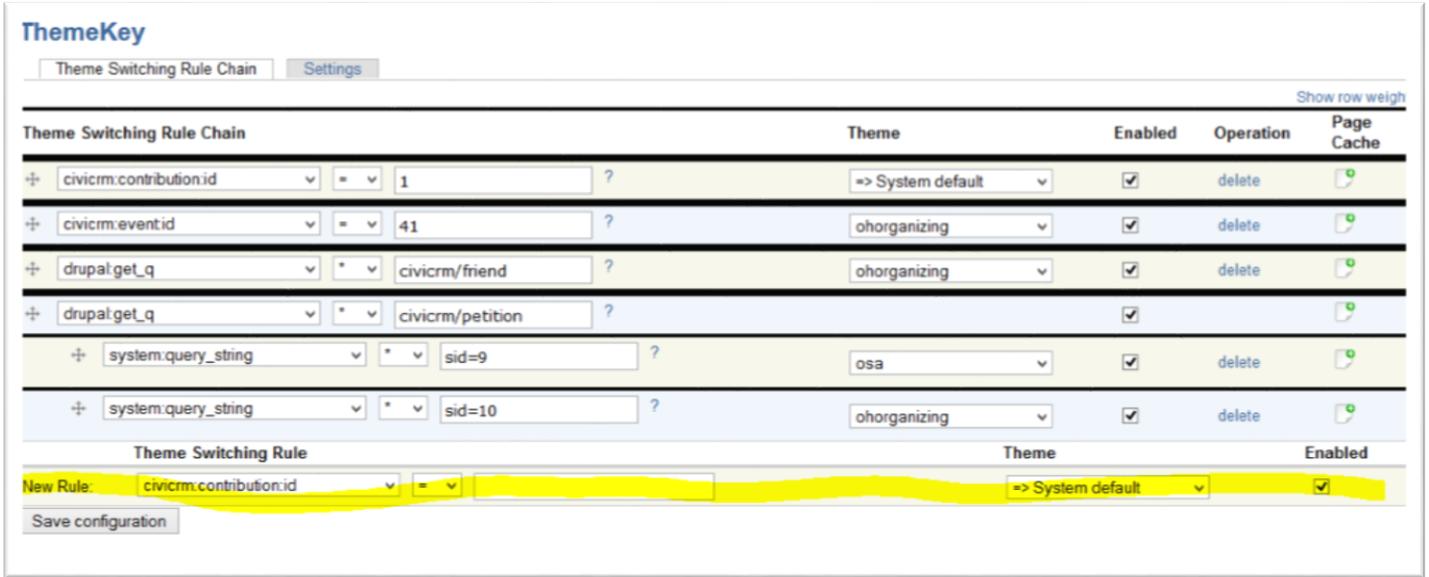
Replace the word "SITE" with the name of your PowerBase site.

The ThemeKey Configuration Page

This is where themes are linked to public facing PowerBase pages. They can be tied to contribution pages, event registration pages, forward to a friend pages and petitions. We're focusing on petitions in this document.

If you get to this page and you don't find a line that has "civicrm/petition", then you need to contact PowerBase support before proceeding.

How to Assign a Theme to a Petition

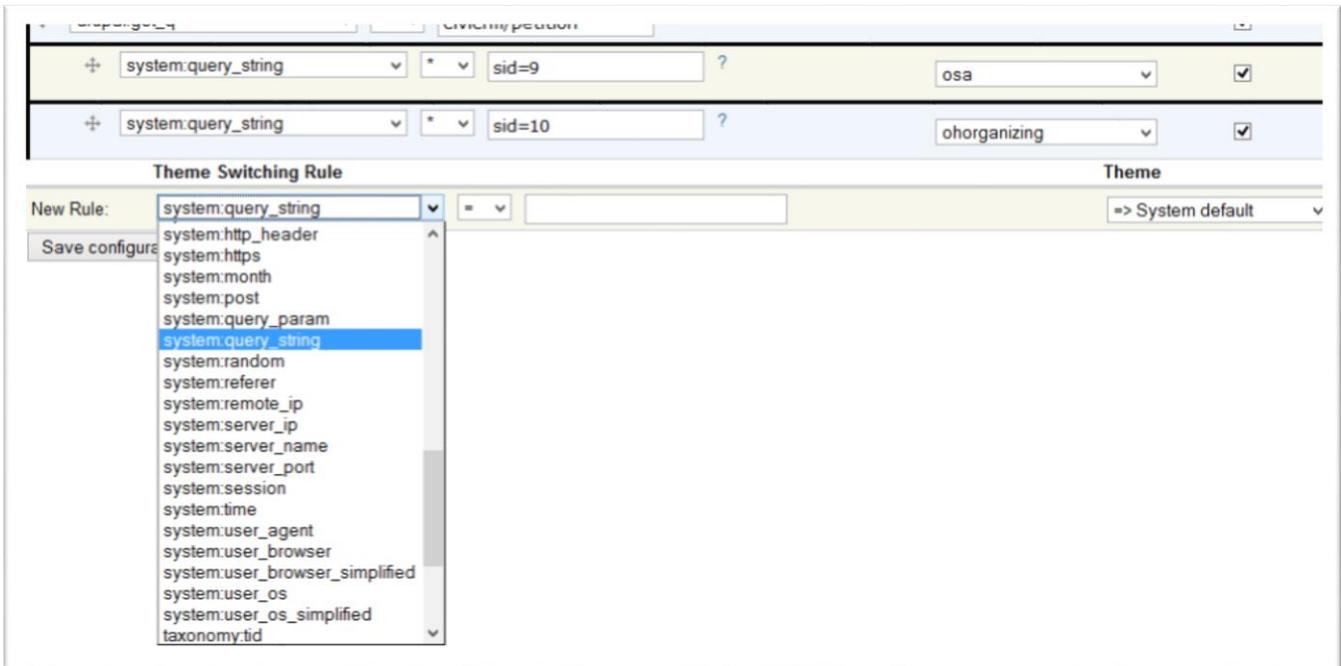


On this screen, you are telling the ThemeKey component of CiviCRM and Drupal how it should behave when a web page is displayed. Web pages are displayed based on their url (universal resource locator). The url is simply the name for the link in your browser that begins with “https://” or “http://”. What we’re doing here is making a list of specifications for the ThemeKey component to use as it examines all the other stuff after the “://” in the url.

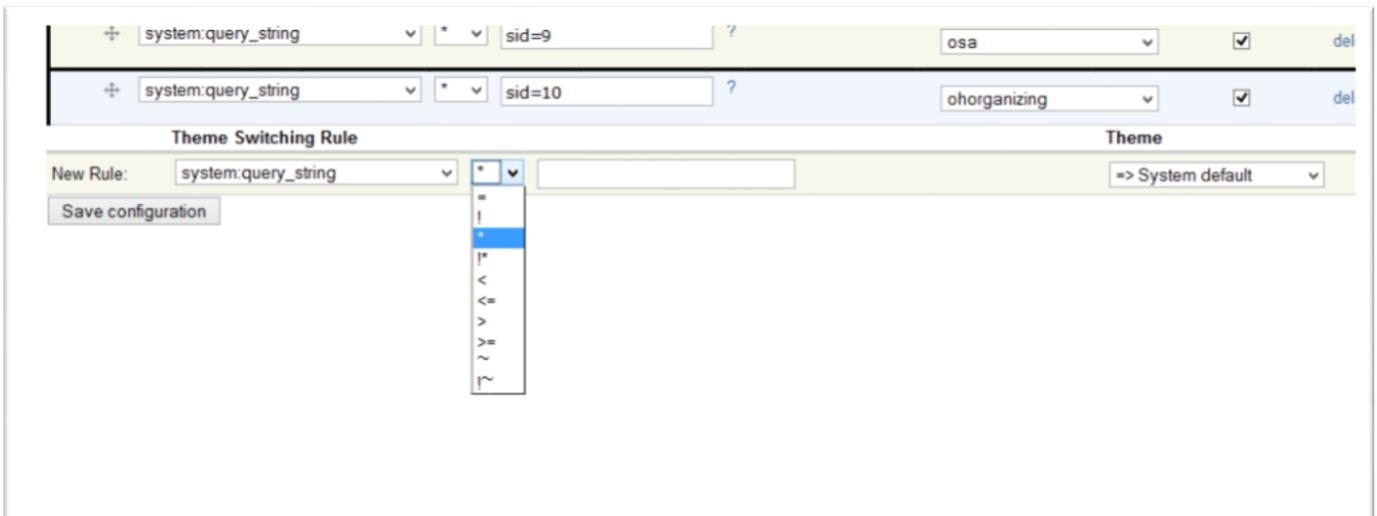
If you look closely at urls you’ll see that they sometimes are very long with seemingly inscrutable codes in them. These are actually parameters that tell the web server and your computer’s browser what to do with the page, among other things.

Since PTP will have done the initial set up of ThemeKey, we only need to worry about how to tell ThemeKey that you’ve got a new petition that should have its own, different, theme. You do this by adding another row with a New Rule. You’ll be working on the highlighted New Rule line.

How to Assign a Theme to a Petition



In the first box on the left, click on the triangle which will display a drop down list of lots of entries in alphabetic order. Scroll down until you get to “system: query_string” and select it by clicking it.



Go to the next box, click on it, look at the drop down list and find the asterisk (*). Click on it to select it.

How to Assign a Theme to a Petition

Theme Switching Rule	Theme
system.query_string * sid=9	osa
system.query_string * sid=10	ohorganizing
system.query_string * sid=11	osa

In the next box, you need to enter the phrase “sid=” and the number of the petition page. In the example above, the petition is number 11, so the phrase entered is “sid=11”. You should have found the petition number beforehand, so that you have it now.

Clicking on the right hand box under the heading “Theme” will get you to a list of the themes installed on your system. Select the appropriate theme for the petition. You should have gotten that from PowerBase Support if you don’t know it already.

Theme Switching Rule Chain	Theme	Enabled	Operation	Page Cache
civicrm.contribution.id = 1	=> System default	<input checked="" type="checkbox"/>	delete	
civicrm.eventid = 41	ohorganizing	<input checked="" type="checkbox"/>	delete	
drupal.get_q * civicrm/friend	ohorganizing	<input checked="" type="checkbox"/>	delete	
drupal.get_q * civicrm/petition		<input checked="" type="checkbox"/>		
system.query_string * sid=9	osa	<input checked="" type="checkbox"/>	delete	
system.query_string * sid=10	ohorganizing	<input checked="" type="checkbox"/>	delete	
system.query_string * sid=11	osa	<input checked="" type="checkbox"/>	delete	

Click “Save Configuration” and you’ll see that your new rule has now moved up to the bottom of the list and there is a space for another new rule where you were just working.

The next step is to drag the rule you made into the right place, which is indented under the section that begins with “civicrm/petition”. This is the trickiest part in that we can’t show you exactly how to do this on paper, we can only describe it. Click on the plus sign like icon and hold. Drag up with your mouse and it will move around. If you get it under the “civicrm/petition” group heading, it will look like the next screen.

How to Assign a Theme to a Petition

ThemeKey

Theme Switching Rule Chain Settings Show row weights

 * Changes made in this table will not be saved until the form is submitted

Theme Switching Rule Chain				Theme	Enabled	Operation	Page Cache
+	civicrm:contribution.id	=	1	=> System default	<input checked="" type="checkbox"/>	delete	
+	civicrm:eventid	=	41	ohorganizing	<input checked="" type="checkbox"/>	delete	
+	drupal:get_q	*	civicrm/friend	ohorganizing	<input checked="" type="checkbox"/>	delete	
+	drupal:get_q	*	civicrm/petition		<input checked="" type="checkbox"/>		
+	system:query_string	*	sid=9	osa	<input checked="" type="checkbox"/>	delete	
+	system:query_string	*	sid=10	ohorganizing	<input checked="" type="checkbox"/>	delete	
+	system:query_string	*	sid=11	osa	<input checked="" type="checkbox"/>	delete	

Theme Switching Rule

New Rule: civicrm:contribution.id = => System default

Once you have it in place, click “Save configuration” again and you are done. If it’s not in the right place, move it until you get it there. If it still doesn’t seem to get “under” the “civicrm/petition” group, you should not save the changes. Take a screenshot and send it to PowerBase Support and we’ll take a look at it.

If it went well, go to the petition dashboard and select “sign” again and when you do so, the petition should be there shiny and bright in your theme. If not, reach out to PowerBase Support and we’ll be there for you.

Choosing and configuring an SMS Provider for PowerBase

Overview

SMS is a new feature that allows you to send SMS text messages to cell phones in your database. They are sent via the action menu on Advanced Search. We currently have two service options for being able to send SMS messages via PowerBase: Clickatell and Twilio. These are external to PowerBase. You must set up an account with one of them and arrange separate payment before you can start sending SMS messages

Both offer the option to receive SMS into PowerBase as well as sending them. If you plan only to send messages, and not to receive them, Twilio is the less expensive option (1 cent per SMS plus \$1 a month for the phone number required to be able to send SMS). Twilio is also easier to configure. If you want to send and receive SMS texts, Clickatell seems to be less expensive, but it appears to vary depending on how many SMS messages you are sending every month.

Setting up

Both Twilio and Clickatell software are included as extensions in your PowerBase which means they are not installed by default. If the extension you need is not yet installed, you can install it from the Extensions option off the **Administer** Menu. Click on **Administration Console**. Got to **Manage Extensions** in the **System Settings** section. Select the extension you wish to install and click on the **Install** link. That's all you have to do.

To create a Clickatell account:

1. Go to the Clickatell website and sign up for a Small Business API account (<http://americas.clickatell.com/solutions/small-business-api>), which is the cheapest account type that will let you send and receive SMS in the US.
2. Create a Clickatell HTTP API product
3. In Clickatell Central, use the Manage My Products page to add a HTTP connection. This will generate an API ID that, together with your username and password, you need to add it to the SMS Provider settings of CiviCRM.
4. On this page, you will also need to have the Two-way number set up. Click on "US Long Codes (Small Business)." Clickatell will provide a phone number and you will need to provide two things:
 - a. Reply Path: HTTP POST and
 - b. Target Address, which is
`https://SITE.ourpowerbase.net/civicrm/SMS/callback?provider=clickatell`
Substitute your organization's PowerBase name for SITE. Save changes at the bottom of that page.

Configure SMS Provider Settings for Clickatell in PowerBase

Choosing and configuring an SMS Provider for PowerBase

Click on **Administer » System Settings » SMS Providers**.

Click on "**Add New Provider**"

In the Manage SMS Provider Page, the providers that are enabled are available. Choose Clickatell.

Type some name for your SMS provider in the Title textbox.

The Username is the username you created

The Password is the password you created

Select "http" for the API Type. The API Url is <https://api.clickatell.com>

Under API Parameters, you need three items:

api_id=123456

from=12123456789

mo=1

You have to replace '123456' with your api_id and '123456789' with the phone number Clickatell provides.

To create a Twilio Account:

1. Go to the Twilio website (<http://www.twilio.com>) and sign up for an account. You can create a trial account and test, but you will need to upgrade your account in order to send SMS messages properly.

2. Configure SMS Provider Settings in CiviCRM.

To reach the SMS provider settings page, navigate through the menus as follows:

Administer » System Settings » SMS Providers

Click on "Add New Provider" button.

In the Manage SMS Provider Page, the providers that are enabled are available. Choose Twilio.

Type some name for your SMS provider in the Title textbox.

The Username is the AccountSid.

The Password is your AUTH token.

Select "xml" for the API Type. The API Url is <https://api.twilio.com/>

Under API Parameters, you need to put in the phone number Twilio provides for your account, like this:

From=12345678901

Choosing and configuring an SMS Provider for PowerBase

You need to include the prefix 1 in the “From” phone number. Also, it is case sensitive, so please put in “From”, not “FROM”.

Using SMS to Send a Message

The CiviCRM manual (available off the **Help** Menu in PowerBase) has a pretty good description of how to send SMS messages to individuals or a group. Here’s a link to the appropriate section:

<http://book.civicrm.org/user/current/SMS-text-messaging/everyday-tasks/>

Before using SMS to send an alert, you’ll want to test it on a few phone numbers. The best practice is to allow time to get this testing done before you have a need to send a mass text message.

Sending email through PowerBase

Think about these questions before you start:

- What are your goals with this email?
- Who is the audience?
- (We're assuming you've already decided email is the most effective tool for your goal & audience.)
- When do you send it?
- What information will we want as a result of sending this email?
- What are we going to do with that info once we have it?
- Who is this email from?
- What kind of subject line is needed?
- Make a group and check "Mailing List" setting (covered in separate session)

Sending email through PowerBase

PowerBase Email checklist

- Create message
 - Exclude everyone without email
 - Exclude everyone whose email bounced last time.
 - Add images – prepare your images before you upload them to PowerBase pay attention to dimensions as well as file size (large image sizes load slow)
 - Include alternative text when using images
 - Create templates or work with a professional to develop a set of templates
 - Tokens: name, forward to a friend, update your contact info
 - Custom tokens: most recent contribution, etc.
 - Footer/header
 - Attachments

- Include the essentials
 - physical address (which is a token known as {domain.address})
 - bulk opt out token
 - (optional) opt out of just this mailing list

- Send test message to your *testing group* and check the following:
 - Links – working?
 - Header/footer – contain correct links
 - Tokens – correct values? Are you confident you have that field filled in for all recipients?
 - Layout – looks like you expect?
 - Are the font sizes uniform?
 - Images – showing up? Are they loading quick or do they take too long?
 - Forward to a friend link included
 - Did you include a text version of the email? Are you checking it for typos, etc?

- Schedule/send immediately: remember that when you choose to *send immediately* it could be up to 10 minutes before it actually goes out since the PowerBase mailings schedule (chron job) runs every 10 minutes

- Reports
 - How many clicks?
 - How many opens? (This number only matters relative to other emails you've sent to this list. The number itself is not accurate.)
 - Surprising number of bounces/unsubscribes?
 - Bounce reasons

Sending email through PowerBase

Now clean up your list and repeat.

Differences between bulk email & one-off email

Bulk	One-off
Unlimited recipients	Under 50 people
Track clicks/opens	No record of open/clicks
Slower set-up	Quick set-up
Ability to test & preview	No testing or previewing
Smart de-duping	n/a
Include/exclude groups, tags, or recipients	Send to anyone you can pull up in search results

Once you have the search results or are displaying contacts in a group, you can send a one-off email to all of them.

The difference? A one-off email can be sent with less setup. You just need to get to a single contact record, or select fewer than 50 search results, and you can send email through the Actions dropdown list.

Reporting

Who opened the email? (and how the stats can be misleading)

Who clicked on the email? (the more useful number)

Which emails bounced? And who do we take off our list now?

Did we ask them to do anything? Did they?

To see these statistics, click on **Mailings > Scheduled and Sent Mailings**, find your mailing, and click on **Report**. This will show information about all the tracked actions including Bounces.

Also, when the mass mailing is sent to recipients, an Activity "Bulk Email" is recorded under their Activities tab. To see the activity that was just recorded of the email sent, click the Activities tab of the different contacts.

Sending email through PowerBase

Resize images for email

Advice on getting images to the correct size for an email

Have you ever seen an email where the image is too large and takes over the screen? That happens when the image is not properly resized before linking it to the email. How about an image that is so indistinct that you can't figure out what's in it? This note is going to help you avoid those situations.

First, some definitions may be helpful. Think of the screen as the piece of paper that the image will appear on when someone opens your email. Screen measurements are defined in pixels as are camera images, so you can use them as a handy unit of measure for determining the ideal size of your image in the email. Your typical email is around 800 pixels wide. Your typical photo from a new cellphone is 3264 pixels wide, which is wonderful for printing, not so helpful for emailing. (See this table for a comparison of image sizes <http://www.bhphotovideo.com/FrameWork/charts/resolutionChartPopup.html>)



Obviously, you're not going to be able to show a width of 3264 pixels in an email that is 800 pixels wide without shrinking the picture.

There are good ways to do this and not so good ways. While you can get your email editor in PowerBase to compress the picture and only show an image of, say, 600 pixels wide, if you don't reduce the picture pixel size

Width of Email is 800 Pixels

beforehand, you cause yourself two problems. First, you're sending a whole lot of excess bytes to the email recipient. She won't be happy if she's reading it on her cell phone as it will take a long time to download. Secondly, you run the risk of embarrassing yourself if her email client doesn't compress it the way you intended. **Email client software is notoriously inconsistent when it comes to handling html layout and one of the ways that it manifests itself is in how it handles images.** Your email client may show your wonderfully designed email just right, but someone else's may screw it up.



Width of Photo is 3264 pixels wide

Cropping and Resizing

Here's what you do avoid the pitfalls and get your best image in front of your reader.

- 1) Crop it. Cropping means removing all the extraneous background or nonessential sections of your photo.

Resize images for email

- 2) Resize it. After it's cropped, resize the image to fit inside your 800 pixel width. If your email has two columns, and you want the image to be in one of the columns, then you are looking at a 400 pixel width or smaller.

We haven't talked about the height of the image because most of the time, if you crop the image well and get the width right, the height will work out as well. There are times, though when you may have an image that is too tall for the space. In those cases, you have to crop it more, or reduce the width more, or get a new image. But whatever you do, make sure you reduce the size of the image proportionally so that it doesn't get distorted. Don't shoehorn the image into a space by squeezing one dimension. The result will be ugly.

Tools for Cropping and Resizing

You need an image editor. You have lots of choices. There are some built into your computer, you can get free open source ones, you can buy one or you can use an online one. **Whatever you chose, take the time to learn how to crop and resize. Ignore everything else it may do until you've mastered those two skills.**

There are numerous open source and free ones. GIMP (<http://www.gimp.org/downloads/>) works on both Mac and Windows. Photoshop is top notch, but expensive. In Mac and Windows operating systems, you have a basic one built in. Here's a tip on resizing with the venerable Windows Paint application: <http://Windows.microsoft.com/en-US/Windows7/Resize-a-picture-using-Paint>. You can go online and do it through your browser. Just search the internet for "online image editor" and you'll see multiple options.

I've got the image, now what?

After your image is the right size, save it on your machine in a place that you can find again. Give it a name that does not have embedded blanks. For example, "my picture" as a name has an embedded blank; however, "my_picture" does not.

Then go into PowerBase's email editor and select insert image. Select the option to upload the image to the server. You want all of your images that are used in PowerBase emails to be hosted on the PowerBase server. This applies to event registration and contribution pages as well.

When you insert the picture, be sure to set a margin of at least 5 pixels around it. These will prevent the text from running up next to your image. Also, give it an alluring and informational alternative text. Many people will never download your image, but they will see the text in some email editors. And folks that don't see images well or at all will be able to use their screen reader software to understand what the image is about. If you set the alignment to "right" or "left", browsers will wrap the text around it. You probably want that.

Managing Your Emails Lists: Bounces, Holds, Unsubscribes

This document covers what you need to know keep your email list healthy with low rates of bounced emails and unsubscribes. You should be able to use this documentation to assist you in understanding mailing reports and knowing what to do with them to keep your mailing lists clean. We'll also cover what happens when someone unsubscribes from a mailing list group or to all future emails.

Definitions

Here's the nomenclature that we're using in this document:

Bounce – an email that was sent from your PowerBase server that triggered an unusual reply from the receiving email server.

Bounce Message – the reply from the email server tells PowerBase something about the fate of the email that you sent.

Bounce Reason – The extract of the Bounce Message that PowerBase is using to determine the Bounce Type

Bounce Type – a group of 11 categories used to decide whether to hold an email address or not.

Hold – A status of an email address that will prevent PowerBase from sending to new emails to it.

Un-Hold – Removing the hold status of an email address

Unsubscribe – An action an email recipient takes to be removed from a specific mailing list or all email messages

Bulk Email Opt Out – a Privacy status in the contact's record showing that they've opted out of all email messages.

Mailing List – In PowerBase, any group of contacts that has a Group type of "Mailing List" and therefore eligible to be sent emails via the Mailings Menu. To see which groups are Mailing Lists, go to Contacts->Manage Groups.

Bulk Email – emails sent from the Mailings Menu in PowerBase.

Email Host or Server – the computer that holds the email accounts. When bulk email is sent, PowerBase uses its email server to send the email and receive the replies from the recipient's email server.

CiviCRM – the open source software that Progressive Technology Project uses as part of PowerBase's services. CiviCRM contains the software code that handles most of the issues described in this document. See www.civicrm.org for more information about CiviCRM

Bounced Emails Explained

Each time you use the Mailings function in PowerBase to send a mass email (also known as a bulk email or email blast), it's possible that a few of the emails will bounce and may not be delivered. Bounced emails can result in

Managing Your Emails Lists: Bounces, Holds, Unsubscribes

the email address getting held. Why does this happen, and what can you do about it? How do you find bounced emails that have put email on hold?

Why Emails Bounce

If the email bounces, it means it was sent to the recipient's email host, but the email host responded with an unusual message. In most cases the email never reached the recipient. It can happen for a number of reasons, including the following:

- 1) the email address has a typo and is incorrect
- 2) the email address doesn't work anymore or is out of commission
- 3) the email inbox is full and can't accept more messages temporarily
- 4) the recipient has an automatic away reply message because they are on vacation or out of the office. In this case, the recipient will see the email when she returns.

As you can see, bounces happen for different reasons; some bounces are due to a permanent problem with the email address and some are because of temporary condition. A permanent problem, for example, is when the address is no longer valid. A full mailbox bounce message is due to a temporary condition, but if it's received multiple times for an email address PowerBase will put it on hold.

You can "un-hold" emails, but if it's a bad email address, it will just get held again, so it's better to get a new email address for the contact or remove it. Emails will bounce if a mailbox is full, so in those cases you want to "un-hold" because, we hope, at some point the mailbox will get emptied. Let's look into what PowerBase tells you about bounces.

Bounce Types

Bounce Type	Description	Hold Threshold
AOL	AOL Terms of Service complaint	1
Away	Recipient is on vacation	3
DNS	Unable to resolve recipient domain	3
Host	Unable to deliver to destination mail server	3
Inactive	User account is no longer active	1
Invalid	Email address is not valid	1
Loop	Mail routing error	3
Quota	User inbox is full	3
Relay	Unable to reach destination mail server	3
Spam	Message caught by a content filter	1
Syntax	Error in SMTP transaction	3

When an email is sent, a message comes back to PowerBase from the mail host that is receiving it. PowerBase has software that attempts to interpret the message and, if it finds that the original message was not delivered without incident, the software categorizes the reason for the bounce. PowerBase then makes a decision about whether to put the email address on hold or not.

Managing Your Emails Lists: Bounces, Holds, Unsubscribes

Email bounce messages are not standardized, so PowerBase does not always succeed at categorizing the reason for the bounce. In those cases, you may see a Bounce Reason of “Unknown bounce type: Could not parse bounce email”.

An email will be put on hold if it bounces as many times as are shown in the Hold Threshold column. When the bounce is for a temporary condition and if the number of bounces of this email is below the “hold threshold”, PowerBase will still try to send to this email address next time you include it in a bulk email. A threshold of 1 means the email with that type of bounce has will be held after only 1 bounce. For example, an Away bounce must happen 3 times before an email is put on hold. By contrast, just one Inactive or Invalid bounce will result in the email getting put on hold.

Here’s more on bounce handling in the CiviCRM documentation:
<http://wiki.civicrm.org/confluence/display/CRMDOC43/Bounce+Handling>

Manage Held Emails

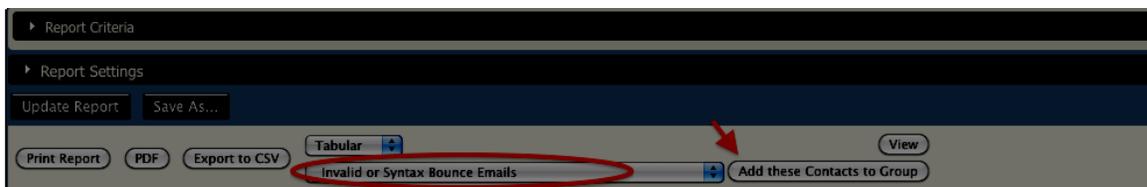
When emails get put on hold in PowerBase, you can decide what to do with them. The process is to locate the held emails, find out what the reason is for the hold and then, depending on the reason, un-hold them as a group or change or remove the email addresses for each contact.

We’re going to describe two approaches to handling this. The first approach uses the mailing report of specific mailings and is for folks that like to keep up with problems as they pop up. The second approach is to be used if you want to search through your entire database for bad email addresses and intend to clean up and catch up all at once.

Managing Held Emails Approach I – Keeping Up

The best practice for keeping up is to look at the mailing reports from each bulk email that you send.

- You might want to do this a series of times with the each of the “bad” bounce types to get all the bad emails into a group (or groups).
- From here, it’s possible to add all the contacts in your search results to the group you created before.



Once you have these contacts in a group, you can edit all their emails at once using **Batch Update via Profile**. *Note: this will only work if you can correct their email addresses. You will not be able to use **Batch Update via Profile** to delete email addresses en masse.*

Managing Your Emails Lists: Bounces, Holds, Unsubscribes

Pull up the group via **Advanced Search** by selecting the group in the dropdown menu in the Basic Criteria section. We recommend also selecting **Email On Hold** to eliminate anyone whose email bounced previously but has been corrected in the meanwhile.

Select **Batch Update via Profile** for all the results whose email addresses you can correct/update.

You will need to have a profile in place that contains *just* Primary Email.

Select this profile and make edits where possible. Click **Update**.

It may also be a good idea to regularly look at the mailing report of each mailing you send, view the bounced emails, and clean up those few that are “invalid” or “inactive”. For example, for a recent mailing you sent, you could remove/update the emails of those whose emails bounced according to the mail report.

Managing Held Emails Approach II – Cleaning Up and Catching Up

Finding held emails and releasing emails that have been held for temporary conditions

The best way to segment held mail is to use the Mailing Reports off of the Reports Menu to find them, put them in a group and then un-hold them in a batch and then remove the no longer needed group.

Step 1 Create a smart group of all held emails (one time task)

Go to Search-> Find Contacts - Advanced Search.

Select the “Email On Hold” box. If you wish to further restrict the list, add whatever other criteria you need. For example, to limit it to recent emails, go to the Mailings section. Click Search and when the results list appears, click on the round circle to the left of “All nnnnn records” with “nnnnn” representing the number of records found in the search. From the “- actions -” list, select “New Smart Group”. Click go and create the group. Since this group will come in handy in the future, save it with a permanent name.

Step 2 Create a Temporary Group to hold the list of contacts to be un-held.

Go to Contacts->New Group.

Give it a name. PTP recommends creating temporary groups that are to be deleted with a name that indicates that it’s temporary. Our practice is to put the underscore (_) as the first character of the group name. For this task, a good name would be “_Emails to be unheld April 2013”.

Step 3 Find the emails that can be unheld via the Bounced Report method

Go to Reports->Create Reports from Templates.

Find the Mail Bounce Report and open the template. Select display the columns Bounce Reason and Bounce Type.

In the **Set Filters** section, select the Group of all held emails that you made in Step 1. You’ll be running this multiple times to get different Bounce types, so pick one to start and keep track of which ones you’ve done. You should select all the bounce types that have a threshold greater than one, because these are temporary bounce

Managing Your Emails Lists: Bounces, Holds, Unsubscribes

types. Run the report and go ahead and select Preview Report. Then select the temporary group that you made in Step 2 and select “Add these Contacts to Group”. By doing this, you’re making a group of email addresses that can be unheld.

Step 4 How to Un-hold Held Emails

Go to Search-> Find Contacts - Advanced Search.

In Basic Search Criteria, Groups, select the Temporary group that you made in step 2. Press Search.

Once you have the list of contacts with held email addresses to be released, choose the action **Un-hold Emails** from the dropdown list and click **Go**. All emails will now be un-held.

Remember: held emails are different than unsubscribed emails. You can safely un-hold ALL emails without worrying — you still won’t send mail to unsubscribers.

Step 5 Removing Bad Email Addresses

Once you’ve un-held the temporarily bad email addresses in Step 4, the remainder of emails in the group of all held emails that you created in Step 1 are all bad email addresses. Some of the contacts in the group may have a second email address that could be substituted for the bad one. For most, though, you’ll have to clear the email address or get a new one. You can work on their emails using **Batch Update via Profile**. *Note: this will only work to correct the email addresses. You will not be able to use the **Batch Update via Profile** to delete email addresses en masse.*

To prepare for this activity, you will need to have a “Profile” created that holds all the possible email addresses for a contact. We recommend putting in Primary email, Work email, Home email, Main email and Other Email (if used) because then you can see all the alternate emails that the contact has. Also add the “Do Not Email” privacy setting and the “Reason for Do not e-Mail” fields. Explaining how to create that profile is outside the scope of this document.

Go to Search-> Find Contacts - Advanced Search.

Pull up the group by selecting the group in the dropdown menu in the Basic Criteria section. If it’s a mixed group of individuals and organizations, limit the search by contact type to one or the other as Batch Update via Profile only works with one contact type at a time. Click Search.

Select **Batch Update via Profile** from the –actions- list. Select the profile created earlier. Select the set of contacts to work on. On the Batch update list, move copy email addresses. It’s helpful to populate “Reason for Do not e-Mail” field with a message like “bad email” and the date. Set the “Do Not Email” flag on.

Select this profile and make edits where possible. Click **Update**.

The Difference Between On Hold Email & Unsubscribes

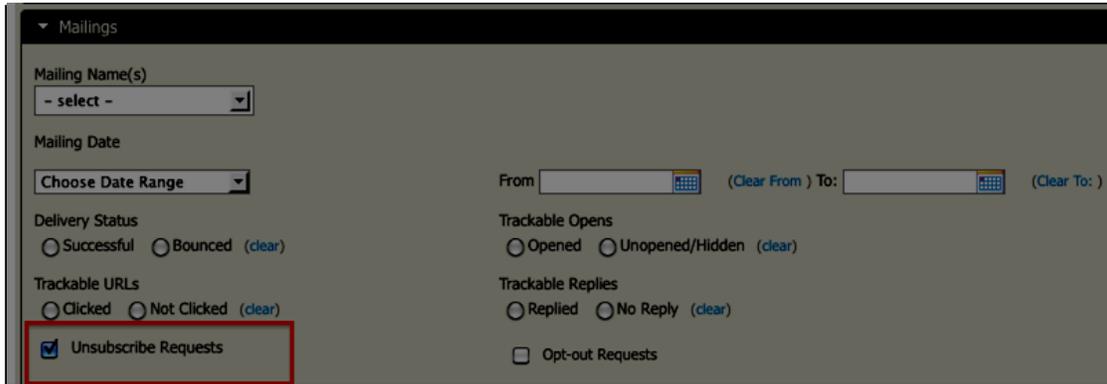
Bounced emails are different than unsubscribed emails. Unsubscribers have clicked the linked text in an email that said “unsubscribe from this mailing”. This link is created by one of these tokens in an email:

{action.unsubscribe} or {action.unsubscribeUrl}

Managing Your Emails Lists: Bounces, Holds, Unsubscribes

Email recipients who unsubscribe from a single mailing list will simply be removed from the group you used as a mailing list to send to.

To find an example of an unsubscriber, go to the **Mailings** section of **Advanced Search**.



Click on one of the contacts in the search results and take a look at their **Groups** tab. You can see it says **Removed (by Web)** from the mailing list group from which they unsubscribed. Notice that their email is not held because it's not in red as shown in the second example below. For example, you could send a non-bulk email to someone who has unsubscribed from a single mailing list group and she would get it.

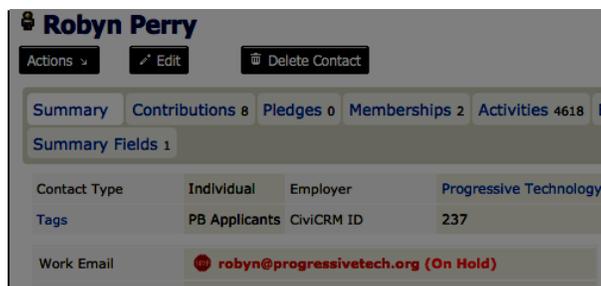
Unsubscribed

View from the Groups tab of a contact record



On Hold

View from the Summary page of a Contact record with email address on hold.



What is an Email On Hold?

Email gets put on hold if PowerBase tries to send an email blast determines that it's not a valid email address. This happens when you send an email and it bounces. That means it never reaches the recipient.

Emails bounce for a number of reasons: a full inbox that can't take in any more messages, a typo in the email, an email address that is out of commission, and various other, more obscure reasons. Reread section I for more details on bounces.

Managing Your Emails Lists: Bounces, Holds, Unsubscribes

Only *some* bounces actually get the email put on hold. Some bounce types are determined by PowerBase to be just temporary problems, and the email won't get put on hold. This means PowerBase will still try to send email to this address in future mailings.

If the email is in red in a contact's record, it is on hold. When you send email blasts, this contact will not receive them.

Find Out Who Unsubscribed

You may want to know who unsubscribes from your mailings. Here are two ways to find out. Use 1 if you want to perform some action on the unsubscribers, like putting them in a group. Use 2 if you just want to glance at who unsubscribed, but don't need to do anything with the list.

1) Search on all contacts who unsubscribed from a particular mailing.

- Go to Advanced Search.
- Open the Mailings section.
- Type the name of the mailing you're interested in.
- Click "Unsubscribes".
- Click Search.

Your list is everyone who unsubscribed from that particular mailing.

If you leave the mailing name field blank and get all unsubscribers from all mailing lists. You may limit to a date range if necessary.

From here, you can create a smart group of unsubscribes or perform any other action from the dropdown list.

2) View a mailing report.

- Go to Mailings > Scheduled and Sent Mailings. Find the mailing you're interested in.
- Click Report in the right column.
- In the report, you'll see the Intended Deliveries and Successful Deliveries, Clicks, Opens, Unsubscribe Requests, **Opt-out Requests**, and other mailing details.
- Click Unsubscribe Requests to see everyone who has unsubscribed from this list as a result of this mailing.

Managing Your Emails Lists: Bounces, Holds, Unsubscribes

Delivery Summary		
Intended Recipients	510	Report Advanced Search
Successful Deliveries	489 (95.88%)	Report Advanced Search
Tracked Opens	85 (16.67%)	Report Advanced Search
Click-throughs	58 (11.37%)	Report Advanced Search
Forwards	0	Report Advanced Search
Replies	0	Report Advanced Search
Bounces	21 (4.12%)	Report Advanced Search
Unsubscribe Requests	2 (0.39%)	Report Advanced Search
Opt-out Requests	2 (0.39%)	Report Advanced Search
Scheduled Date	March 6th, 2013 11:42 AM	
Status	Complete	
Start Date	March 6th, 2013 11:43 AM	
End Date	March 6th, 2013 11:53 AM	

Note: this is different list than the recipients who opted out of *all* emails. Read on for more.

What's the difference between opting out and unsubscribing?

Email recipients also have the option of never receiving mail from you again by clicking a link you provide in every mass email. This means both regular email and bulk email will not be sent to them and is called “opting out”.

To opt out, an email recipient clicked the linked text in an email created by one of these opt-out tokens:

{action.optOut} {action.optOutUrl}

You can include these tokens in your mailing or in a footer message. (For more on tokens, see here: <http://wiki.civicrm.org/confluence/display/CRMDOC42/Tokens>)

You may want to review the opt-outs regularly – it would be a red flag if you got a higher number of opt-outs than usual after sending an email. Follow the same steps on viewing a mailing report to see the opt-out requests. To view a mailing report:

- Go to Mailings > Scheduled and Sent Mailings. Find the mailing you're interested in.
- Click Report in the right column.
- Click **Opt-out Requests** to see the list of everyone who has opted out from all mailings.

Managing Your Emails Lists: Bounces, Holds, Unsubscribes

Delivery Summary		
Intended Recipients	510	Report Advanced Search
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Scheduled Date	March 6th, 2013 11:42 AM	
Status	Complete	
Start Date	March 6th, 2013 11:43 AM	
End Date	March 6th, 2013 11:53 AM	

People who opt-out of all mailings will not receive any email from you, period. Their email is not held so it won't be un-held by the process of un-holding emails, as described in *How to Correct/Update Held Emails* above.

You can also find everyone who has opted out of future mailings from you via Advanced Search:

- In the **Mailings** accordion of **Advanced Search** click **Opt-out Requests** and hit **Search**. You will see everyone who has requested never to receive email from you.

Mailing Name(s): - select -

Mailing Date: Choose Date Range

From: [] (Clear From) To: []

Delivery Status: Successful Bounced (clear)

Trackable Opens: Opened Unopened/Hidden (clear)

Trackable URLs: Clicked Not Clicked (clear)

Trackable Replies: Replied No Reply (clear)

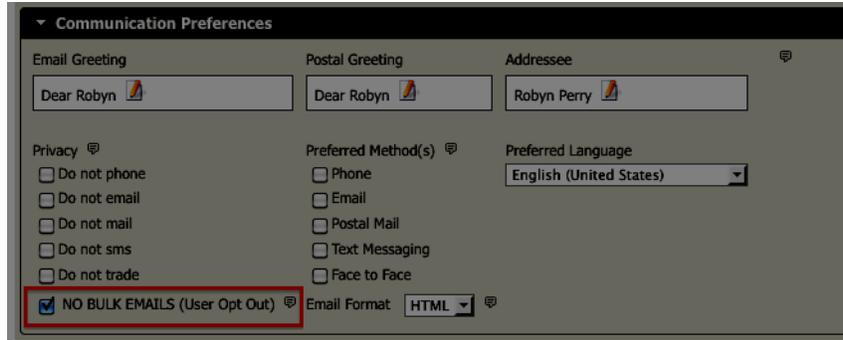
Unsubscribe Requests Opt-out Requests

If you take a look at someone who has opted out of all emails from you, their summary page looks like this:

Privacy	NO BULK EMAILS (USER OPT OUT)
Preferred Method(s)	
Preferred Language	English (United States)
Email Format	HTML
Email Greeting	Dear Robyn
Postal Greeting	Dear Robyn
Addressee	Robyn Perry

Managing Your Emails Lists: Bounces, Holds, Unsubscribes

You will notice the email itself is not held, but the "opt-out" checkbox is selected in Communication Preferences. This stops all email from reaching this person as long as it is checked.



The screenshot shows a 'Communication Preferences' dialog box with the following fields and options:

- Email Greeting:** Dear Robyn
- Postal Greeting:** Dear Robyn
- Addressee:** Robyn Perry
- Privacy:**
 - Do not phone
 - Do not email
 - Do not mail
 - Do not sms
 - Do not trade
- Preferred Method(s):**
 - Phone
 - Email
 - Postal Mail
 - Text Messaging
 - Face to Face
- Preferred Language:** English (United States)
- NO BULK EMAILS (User Opt Out):** (This checkbox is highlighted with a red box in the original image)
- Email Format:** HTML

It is possible to remove the opt-out preference, but not advisable unless they explicitly ask to receive mail from you again. You can do this by editing their summary page and deselecting the NO BULK EMAILS checkbox shown above.

Add a Dashlet to Your Homepage

Is there a report you use (or want to use) often? Make your PowerBase homepage *way* more useful by adding the reports that you need to see right to your PB homepage, also known as the dashboard.

If there is data you want to have right at your fingertips each time you log in to PowerBase, create a report and enable it as a dashlet.

Here are the steps to create a report that can be used as dashlet:

- Click **Reports > Create Reports from Templates**
- Select the report that you want to see on your dashboard.
- Choose the criteria you want to look at in your dashlet.*
- Click **Preview Report**.

Database Health Report - Template

Report Criteria

Display Columns

Contact Name Contact ID Modified Records
 Modified Organizations Modified Households Sourced Activities
 Role Last Access

Set Filters

Contact Name: Contains []

User Role: Is one of [] administrator, anonymous user, authenticated user, civicron

Record Creation or Modification Date: Choose Date Range [] From: [] To: [] (Clear From:)

Activity Date: This Year []

Activity Type: Is one of [] Media Coverage, Meeting, Membership Renewal, Membership Renewal Reminder

Preview Report ←

- Once there, click **Create Report**.
- At the bottom of the Create Report section, there's a checkbox that says "**Available for Dashboard?**"

Include Report in Navigation Menu?

All report instances are automatically included in

Permission CivReport: access CivReport

ACL Group/Role: anonymous user, authenticated user, administrator, civicron, Powerbase Administrator

Reserved Report? If reserved, only users with 'administer rese

Available for Dashboard? Users with appropriate permissions can ad

Create Report

Add a Dashlet to Your Homepage

- Click it, and users with permission to see that information (i.e. if it's about events, users who have permissions to see event-related stuff) will be able to add that dashlet.
- Once you've enabled the dashlet, click **Home**.
- Click **Configure Dashboard**. Drag the dashlet from the "Available Dashlets" box to the column where you'd like it to appear.



Once you can view the report on your dashboard, you will have the latest info at your fingertips. If you suspect any data isn't up to date, just click **Refresh Dashboard Data** at the top right of the dashboard.

*Don't hesitate to reach out to support if you need help with creating reports at support@progressivetechnology.org or 612-724-2600 x 114

Read more about the dashboard and dashlets in the manual: <http://book.civicrm.org/user/current/the-user-interface/menu-dashboard-and-dashlets/>

The Basics of Creating Reports

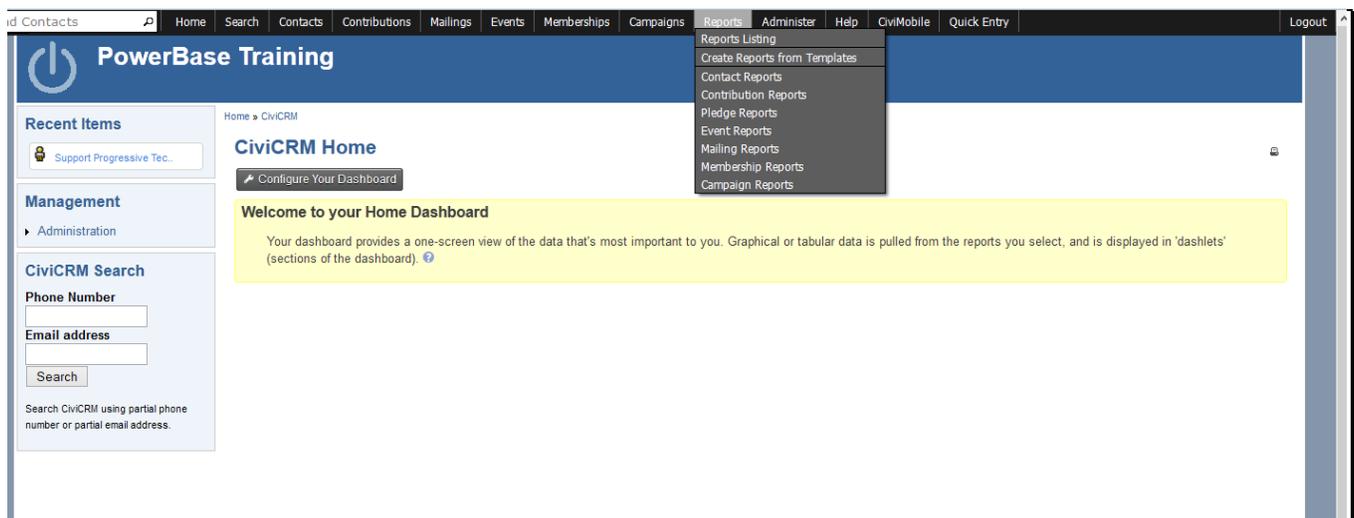
This document gives a general description of the process for creating reports. It describes the features that are common to most reports. The idea is that by reading this you'll have enough information on how reports work to create any report in PowerBase. Of course the details of what you can display, sort by, filter by will depend on the report in question

Reports are created from Report Templates and then they are saved as a Report that can be retrieved from the Reports list (or elsewhere – more details on that to follow) and run. Alternatively, you can create a new report by selecting an existing report, modifying its criteria and save it as a new report.

Once a Report is created, it will automatically be available for others to run from the appropriate category on the Reports menu. As you create it, you can make it available for the Home page Dashboard, allowing anyone with the appropriate permissions to customize their dashboard by dragging it from the gallery of “dashlets”. You can also put it directly on a PowerBase Menu when it's created. For example, a contribution report might be more visible on the Contributions Menu than it would be in the Reports>Contributions Reports menu.

Reports Menu

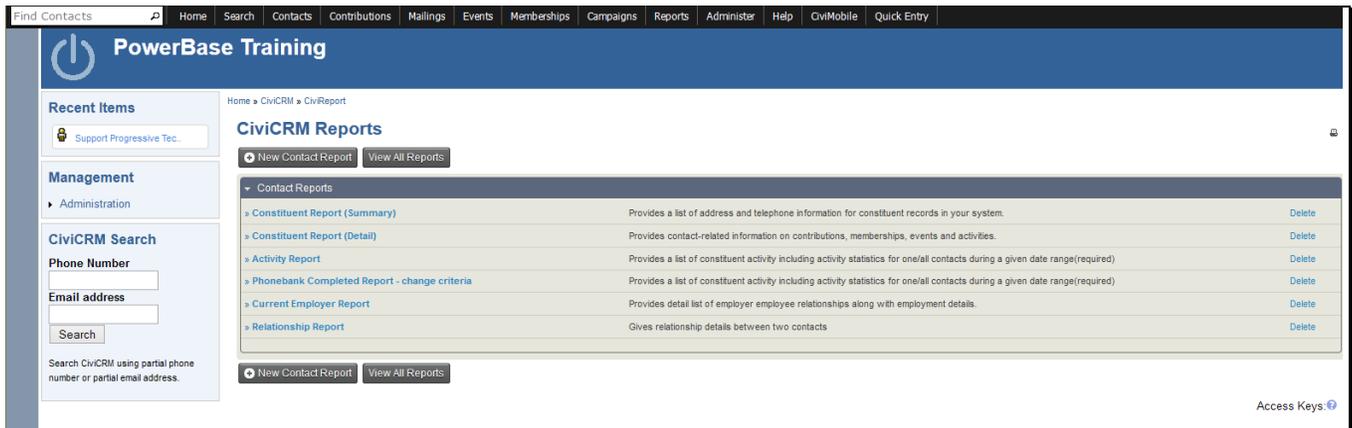
Report creating and using are accessed from the Reports Menu. On the menu, you have the choices of seeing all the Reports that have been created (Reports Listing) and then picking one to run or you can create a new Report (Create Reports from Templates). If you prefer, you can zero in on a category of Reports and do the same operations of using an existing Report or creating a new one from a template.



Reports are segmented by the data that they pull together. In almost all reports, you have access to some Contact information. Others will have Contribution, Membership, Event Participation, Pledge, or Mailings details.

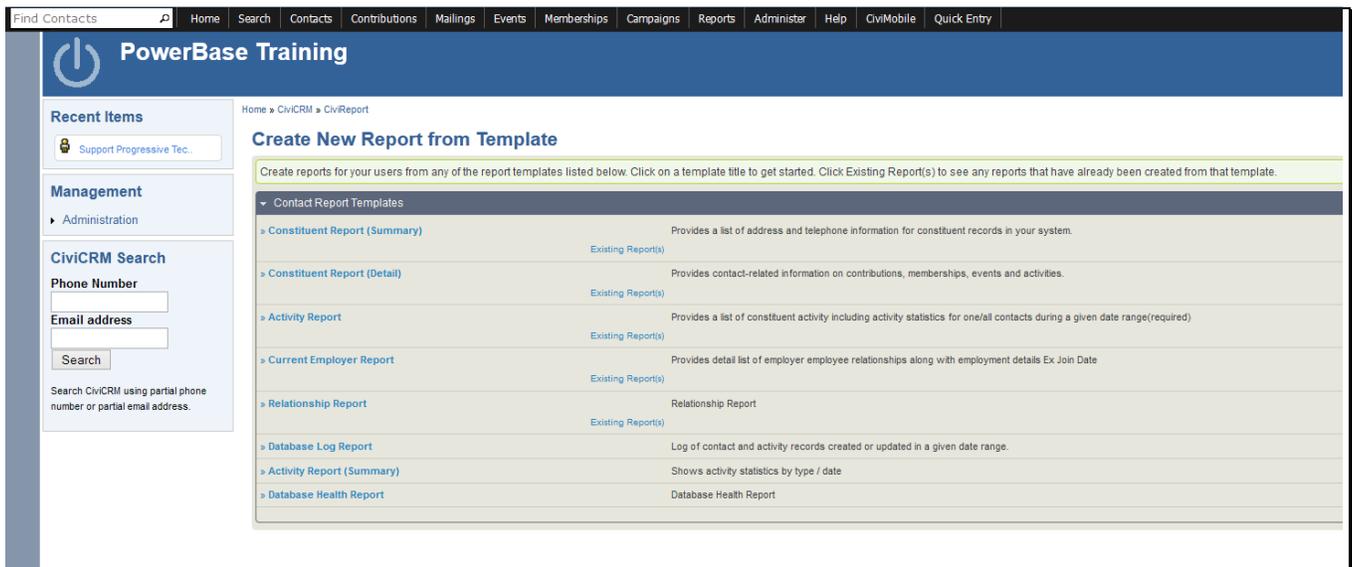
The Basics of Creating Reports

Once you select a category, you'll get to a screen like the one below. It lists all the Reports that have already been created in that category. You can run them by clicking on the name. You can delete the report by selecting the delete option. To create a new Report, click on the button "New Contact Report". Each category will have a different type of New Report. In the screenshot, we are in the Contact reports, so the New button goes to Contact Report templates.



Working from a Report Template

Selecting the New Contact Report button brings you to this screen. From here, clicking on the name starts a *new* Report with default options. Clicking on "Existing Reports" will pull up a list of all the reports created from the template.



There are two major sections in each Report:

1. **Report Criteria** and

The Basics of Creating Reports

2. Create Report

Initially, however, all you see is **Report Criteria** and its multiple sections, each with multiple options. Report Criteria always has these two sections in it:

1. **Display Columns** which controls which fields appear on the Report
2. **Set Filters** which limits the data that will be selected to include in the Report.

In addition, there are some others that often appear in Report Criteria:

1. **Order by Columns** which controls what the sequence of the Report is.
2. **Group by Columns** which allows you to summarize data, such as contributions by person.

Setting up Report Criteria

We will create a Constituent Report (Summary) as an example of creating a report from a template. If you click on Constituent Report (Summary), you'll come to the next screen.

Home » CivCRM » Report Templates

Constituent Report (Summary) - Template

Report Criteria

Display Columns

<input checked="" type="checkbox"/> Contact Name	<input type="checkbox"/> First Name	<input type="checkbox"/> Last Name	<input type="checkbox"/> Contact ID
<input type="checkbox"/> Email	<input checked="" type="checkbox"/> Street Address	<input checked="" type="checkbox"/> City	<input type="checkbox"/> Postal Code
<input type="checkbox"/> State/Province	<input checked="" type="checkbox"/> Country	<input type="checkbox"/> Phone	

- ▶ Communication Details
- ▶ Constituent Info - Individuals
- ▶ Grassroots Info
- ▶ Demographics
- ▶ Constituent Info - Organizations
- ▶ Media Outlet Info
- ▶ Media Info
- ▶ Funder Info
- ▶ Summary Fields
- ▶ Elected Official Info
- ▶ Grant Info
- ▶ Donor Tracking

Display Columns

In this section you select or unselect the fields for the Report. Each of the dark grey rows with a triangle at the left are sets of fields that can be added to the report. Click on the triangle exposes the fields. Select from them as desired.

The Basics of Creating Reports

Setting Up Order By Columns

If this section is there, you can modify the sequencing of the report. Select your preferred sequence.

The **Section Header / Group By** options will group your results by the criteria in the **Column** field.

The screenshot shows the 'Order by Columns' and 'Set Filters' sections of a report configuration interface. The 'Order by Columns' section has three columns: 'Column', 'Order', and 'Section Header / Group By'. The 'Column' dropdown is set to 'Last Name, First Name', 'Order' is set to 'Ascending', and 'Section Header / Group By' is an unchecked checkbox. Below this is a link for 'another column'. The 'Set Filters' section contains five rows of filter criteria:

Field	Operator	Value
Contact Name	Contains	
Contact Source	Contains	
Country	Is one of	United States
State / Province	Is one of	North Carolina North Dakota Northern Mariana Islands Ohio
Group	Is one of	_Donor Status update _Immigrant rights interest in 44505 _JG geo-diverse _JG people

Set Filters

This is a very important section. It controls which data will appear in your report. If nothing is selected, then all data will be included. PowerBase usually defaults to preloading your State as a criteria. Unless you are absolutely sure all records have a complete address, you should deselect it by holding down the Ctrl or Apple key and pressing Enter. If you don't do this, people without a complete address will be filtered out of the group.

There can be many types of data included on the filters section, so it's important to think through how the different criteria interact with each other. If you find that you are not getting records that you know should be included in the report, remove criteria and preview the report again.

Preview Report

Once you've configured the Report, you are ready to **Preview the Report**, which simply means, "Run the Report and show me the results on the screen".

Along with viewing the report on the screen, the Preview mode gives you these options:

- create a version that's suitable for printing (**Print Preview**),
- create a PDF version (**Preview PDF**),
- create a file for downloading (**Preview CSV**),
- add the contacts listed to a group for further work (**Add these Contacts to Group**). The group must be created before adding them to it.

The Basics of Creating Reports

Contact Name	Street Address	City	Country
Aaron, Lillie	584 Granada Ave Apt 107	Youngstown	United States
Abron, Clara	797 Dean St	Youngstown	United States

If the report isn't to your liking, it's a simple matter to change it. Click on the **Report Criteria** row to reopen the settings and change them as needed. You can rerun this as many times as you need until you have it the way you want it. If all you're interested in doing is finding results one time only, then you are done. If you want to save the report to run it again later, you'll need to go into the **Create Report** section.

Create Report

```
<html>
<head>
<title>CiviCRM Report</title>
<meta http-equiv='Content-Type' content='text/html; charset=utf-8' />
<style type="text/css">@import url(https://demo.ourpowerbase.net/sites/all/modules
```

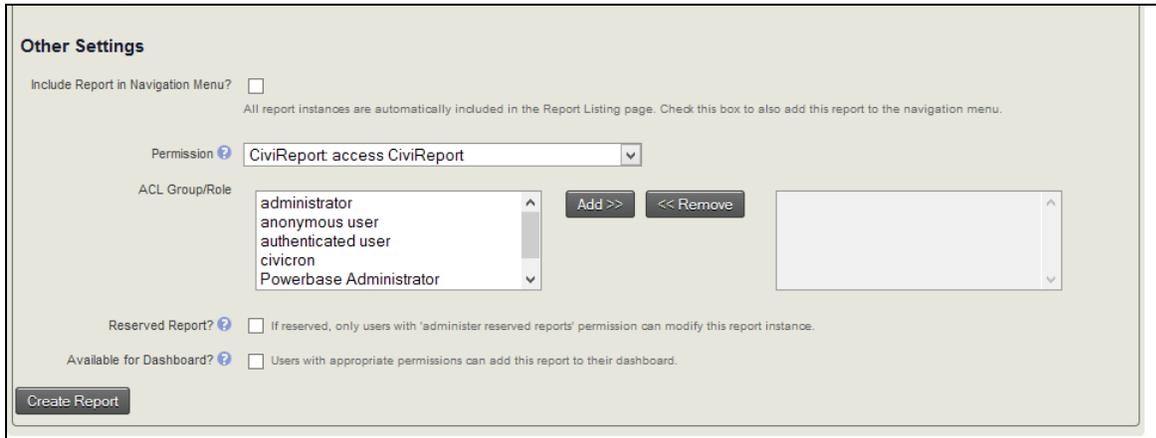
```
<p></p></div></body>
</html>
```

General Settings

Selecting the **Create Report** option exposes more options for you to configure. To save a Report for re-use, you'll need to fill in the **Report Title**. You can edit the **Report Description** to inform others of what you intended the report for. If it's destined for a printer someday, you should edit the **Report Header** and replace the "CiviCRM Report" phrase with the Report Title.

The Basics of Creating Reports

Other Settings



The screenshot shows the 'Other Settings' form for creating a report. It includes the following elements:

- Include Report in Navigation Menu?** A checkbox that is currently unchecked. Below it is a note: "All report instances are automatically included in the Report Listing page. Check this box to also add this report to the navigation menu."
- Permission** A dropdown menu currently set to "CiviReport access CiviReport".
- ACL Group/Role** A list of roles: "administrator", "anonymous user", "authenticated user", "civcron", and "Powerbase Administrator". To the right of this list are "Add >>" and "<< Remove" buttons, and an empty list box.
- Reserved Report?** A checkbox that is unchecked. Below it is a note: "If reserved, only users with 'administer reserved reports' permission can modify this report instance."
- Available for Dashboard?** A checkbox that is unchecked. Below it is a note: "Users with appropriate permissions can add this report to their dashboard."
- Create Report** A button at the bottom left of the form.

Include Report in Navigation Menu? Check this option if you want to add it to a different menu than the Reports menu where it will automatically appear. You'll get a list of all the Navigation menu items. Pick the heading that corresponds to the menu that you want it to appear on.

Permission You can set up a report so that it is only available for some users.

Reserved Report? Keeps folks without the authority from changing your report into something else.

Available for Dashboard? Check this option so that people can add it to their Home page Dashboard. Doing so will show it among the available dashlets that people can drag to their Home page Dashboard.