

# PowerBase Fundraising Track

## Table of Contents

<b>Section</b>	<b>Page</b>
What PowerBase Offers for Fundraising	2
Setting Up Your Fundraising Dashboard	23
Add a Dashlet to Your Homepage	28
Key Numbers Report	30
Contribution Renewals Report	34
Contributor Recovery Report	38
New Contributor Report	42
The Basics of Creating Reports	47
Overview of Planning your Fundraising	53
Setting up and Using the Summary Fields Set	57
The Contribution Reports in PowerBase	62
Fundraising Planning Worksheet	64
Fundraisers Cheat Sheet for Creating Donor Smart Groups	67
Sending Thank You Letters	75
Customizing Receipts in CiviCRM	77
Personal Campaign Pages	78
Fundraising Phone Bank Work Flow	81
Phone Bank Survey	82
Preparing a Profile Form for Online Input	96
Managing Grant Proposals and Reporting	106

# What PowerBase Offers for Fundraising



## 360 Degree Integration with all the Work

- One point of entry for Contacts
- One point of entry for engagement history
- One point of entry for contributions

## Integration

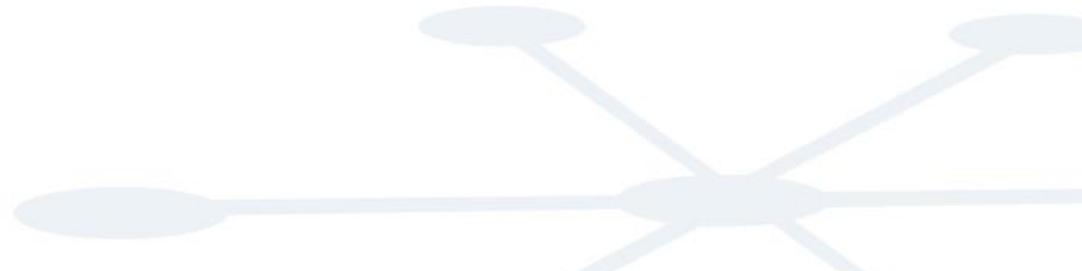
- Built In Email Sender
- Built in Credit Card Processing
- Built In Online Components
  - Event Manager
  - Contributions
  - Petitions
  - Email Sign Up

# MANAGING COMPLEXITY

Invest in Learning

Standardization

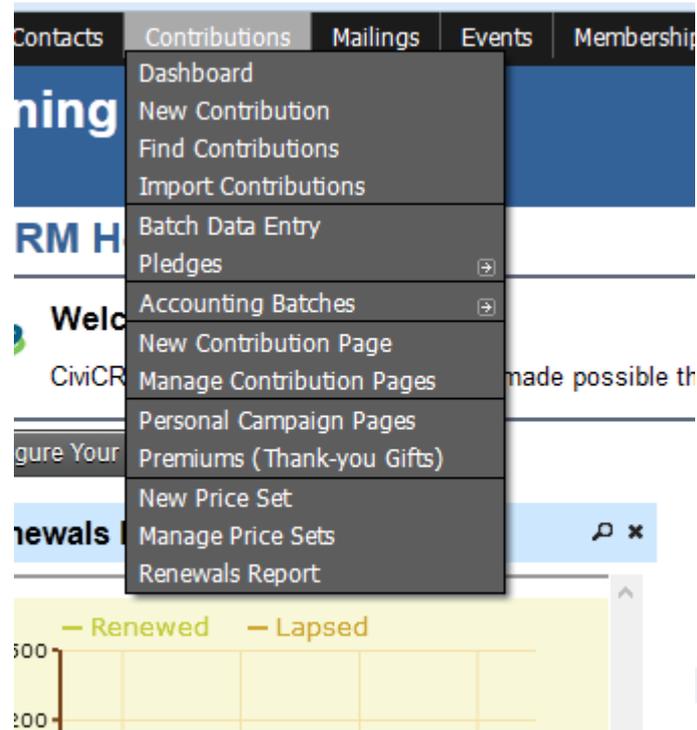
Experiment, Evaluate, Improve



# FEATURES



## Contributions Module

A screenshot of a web application interface showing a navigation menu. The 'Contributions' tab is selected, and a dropdown menu is open, listing various options. Below the menu, a portion of a chart is visible, showing two data series: 'Renewed' (green line) and 'Lapsed' (blue line). The chart's y-axis has markers at 200 and 300. The background of the page is white with a light blue decorative graphic at the bottom right.

- Contacts
- Contributions**
  - Dashboard
  - New Contribution
  - Find Contributions
  - Import Contributions
  - Batch Data Entry
  - Pledges
  - Accounting Batches
  - New Contribution Page
  - Manage Contribution Pages
  - Personal Campaign Pages
  - Premiums (Thank-you Gifts)
  - New Price Set
  - Manage Price Sets
  - Renewals Report
- Mailings
- Events
- Membership

— Renewed — Lapsed

300

200

## Contributions Module

- Contributions
- Dashboard
- New Contribution
- Find Contributions
- Import Contributions
- Batch Data Entry
- Pledges
  - Dashboard
  - New Pledge
  - Find Pledges
- Accounting Batches
  - New Batch
  - Open Batches
  - Closed Batches
  - Exported Batches
- New Contribution Page
- Manage Contribution Pages
- Personal Campaign Pages
- Premiums (Thank-you Gifts)
- New Price Set
- Manage Price Sets
- Renewals Report

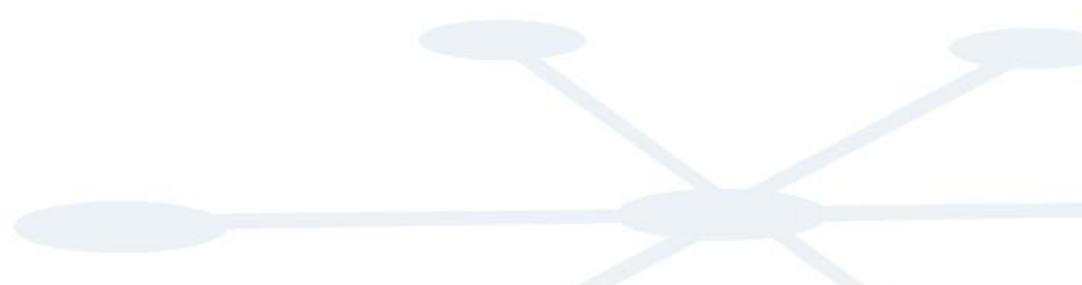
# Events Module

Mailings	Events	Memberships	Campaigns	Re
	<ul style="list-style-type: none"> <li>Dashboard</li> <li>Register Event Participant</li> <li>Find Participants</li> <li>Import Participants</li> </ul>			
	<ul style="list-style-type: none"> <li>New Event</li> <li>Manage Events</li> </ul>			
CRM 4.3	<ul style="list-style-type: none"> <li>Event Templates</li> </ul>			
source soft	<ul style="list-style-type: none"> <li>New Price Set</li> <li>Manage Price Sets</li> </ul>			contributions fr
	<ul style="list-style-type: none"> <li>Personal Campaign Pages</li> </ul>			

🔍 ×

^

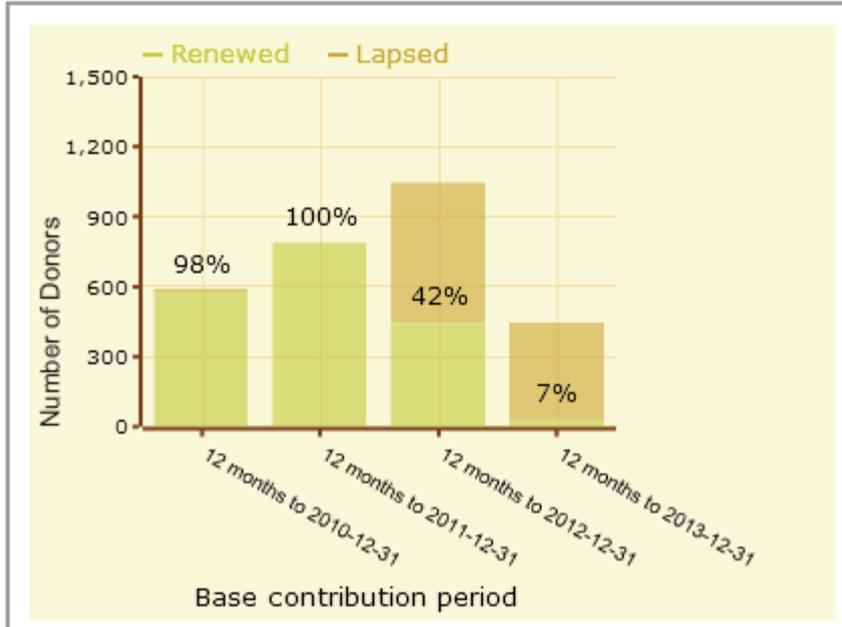
apsed



## Reporting

- » Donor Report (Summary)
- » Donor Report (Detail)
- » Donation Summary Report (Repeat)
- » Donation Summary Report (Organization)
- » Donation Summary Report (Household)
- » Top Donors Report
- » SYBUNT Report
- » LYBUNT Report
- » Soft Credit Report
- » Bookkeeping Transactions Report
- » Personal Campaign Page Report
- » Contribution History By Relationship Report
- » Donor Behaviour Detail
- » Donor Source
- » Contributor Recovery Report
- » Contribution Renewals Report
- » Contributions with Price Set data
- » Report based on Price Set Line Items

Renewals Report



Charts as well as Reports

## Searches

- Advanced Search
- Custom Searches

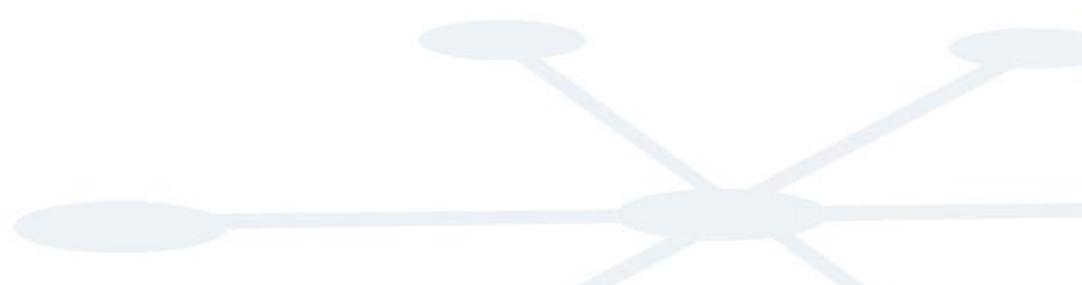


## Contribution Aggregating

- Summary Fields

Summary Fields	
 Delete	
Total Lifetime Contributions	\$ 180.00
Total Contributions this Year	\$ 0.00
Total Contributions last Year	\$ 0.00
Amount of last contribution	\$ 60.00
Date of Last Contribution	12/1/2011
Date of First Contribution	12/1/2009
Largest Contribution	\$ 60.00
Count of Contributions	3
Average Annual (Calendar Year) Contribution	\$ 60.00

# HIGHLY MODIFIABLE



## Custom Fields For Managing Donor Effort

- Donor Tracking

**Donor Tracking**

Donor Solicit?  Yes  No [\(clear\)](#)

Donor Current Level

Donor Ask Level

Donor Category  ▼

Donor Allegiance  ▼

Donor Notes

Donor Objective  ▼

Donor Solicitor

## Configuration

### CiviContribute

- » [Personal Campaign Pages](#)
- » [Manage Contribution Pages](#)
- » [Manage Premiums](#)
- » [Financial Types](#)
- » [Financial Accounts](#)
- » [Payment Instruments](#)
- » [Accepted Credit Cards](#)

Home » CiviCRM

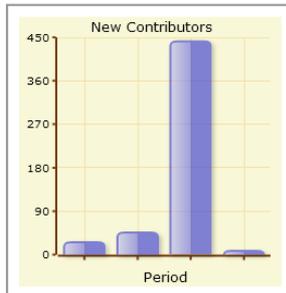
CiviCRM Home

Configure Your Dashboard

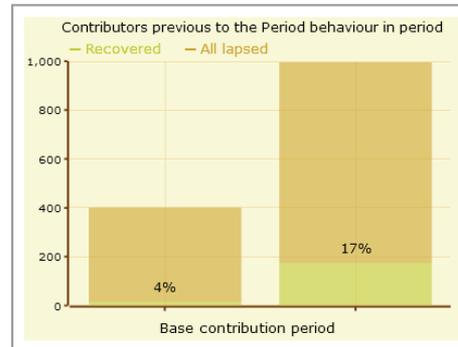
Key Numbers Report

	This Year	Percent Change	Last Year
Total Number of Donors	277	-38%	446
Amount Raised	\$ 17,556.00	-69%	\$ 57,087.00
Amount Raised From Individuals	\$ 17,556.00	-69%	\$ 57,087.00
Average Donation From Individuals	\$ 63.00	-50%	\$ 128.00
Individual Donors who Increased their donation	22	1000%	2
Sustaining Members	0	0%	0
New Contacts in Database	49	n/a	0

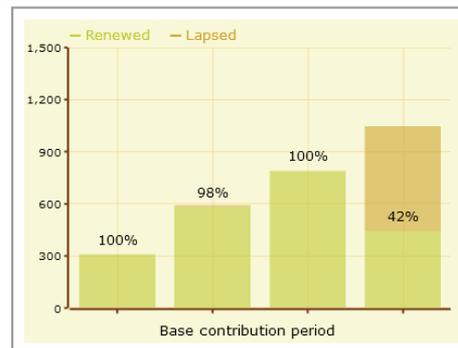
New Contributors by Quarter



Contributor Recovery Report

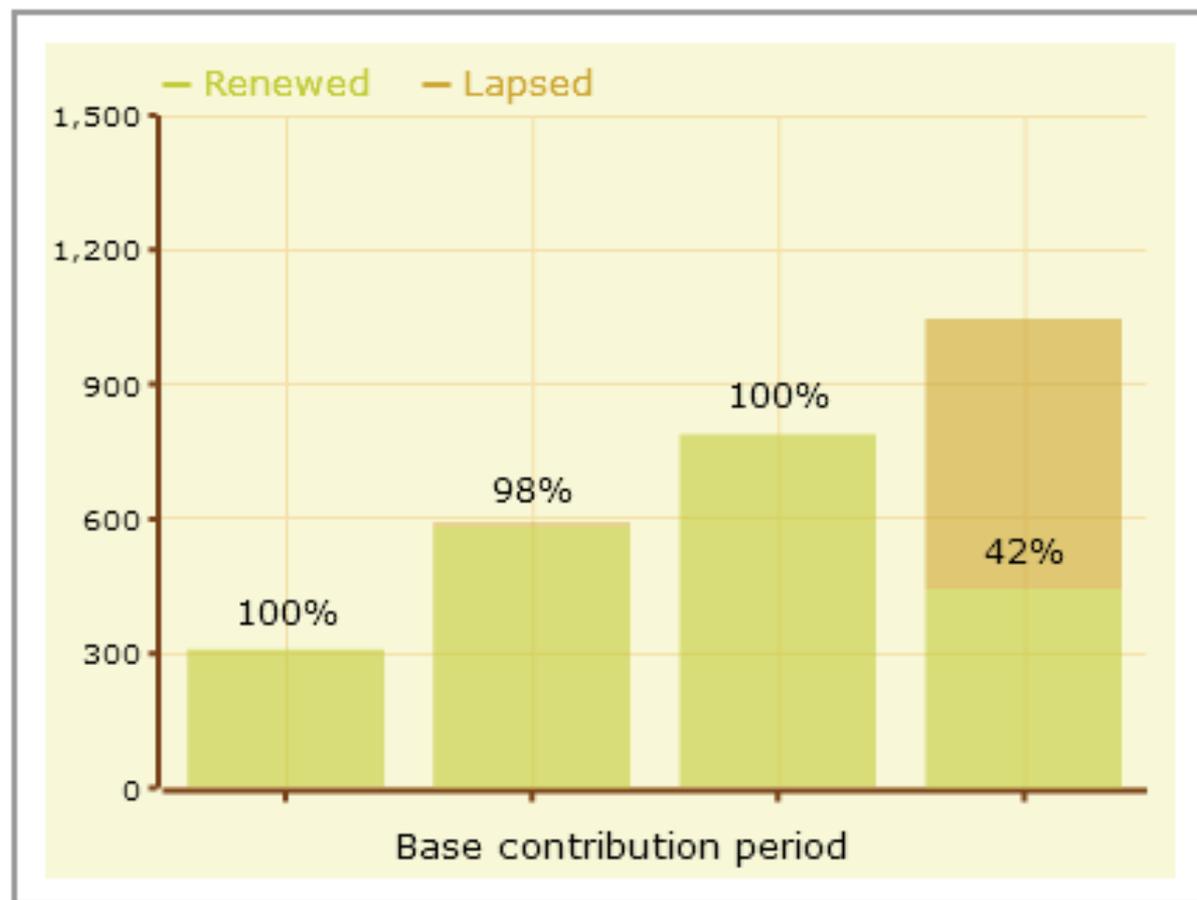


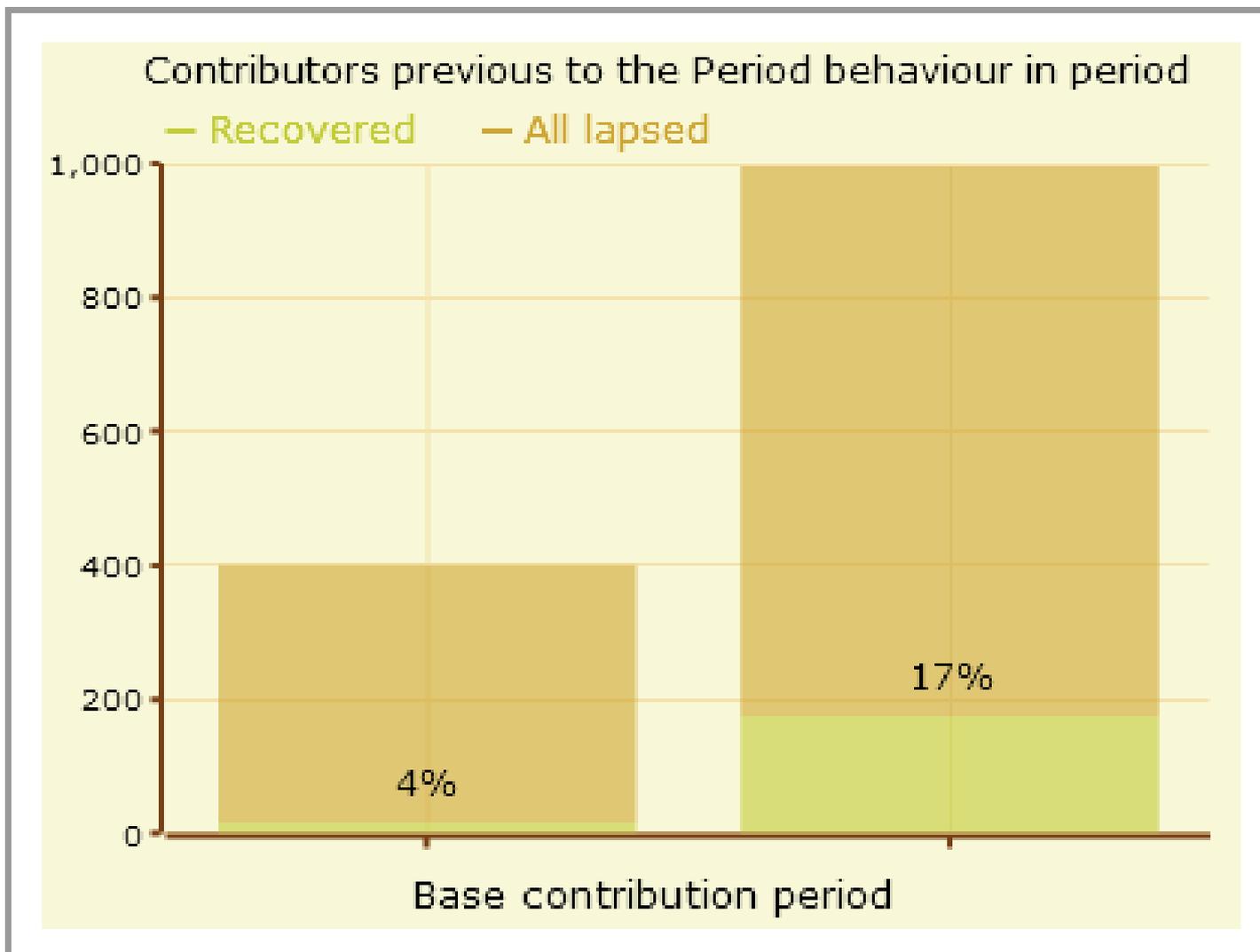
Annual Renewal Rate



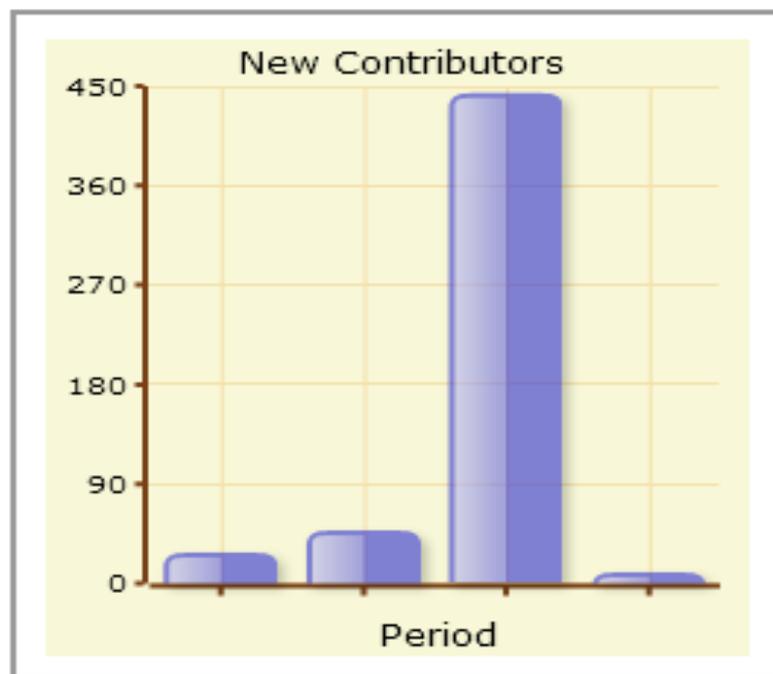
Previous Highlight all Match case

▼ Annual Renewal Rate



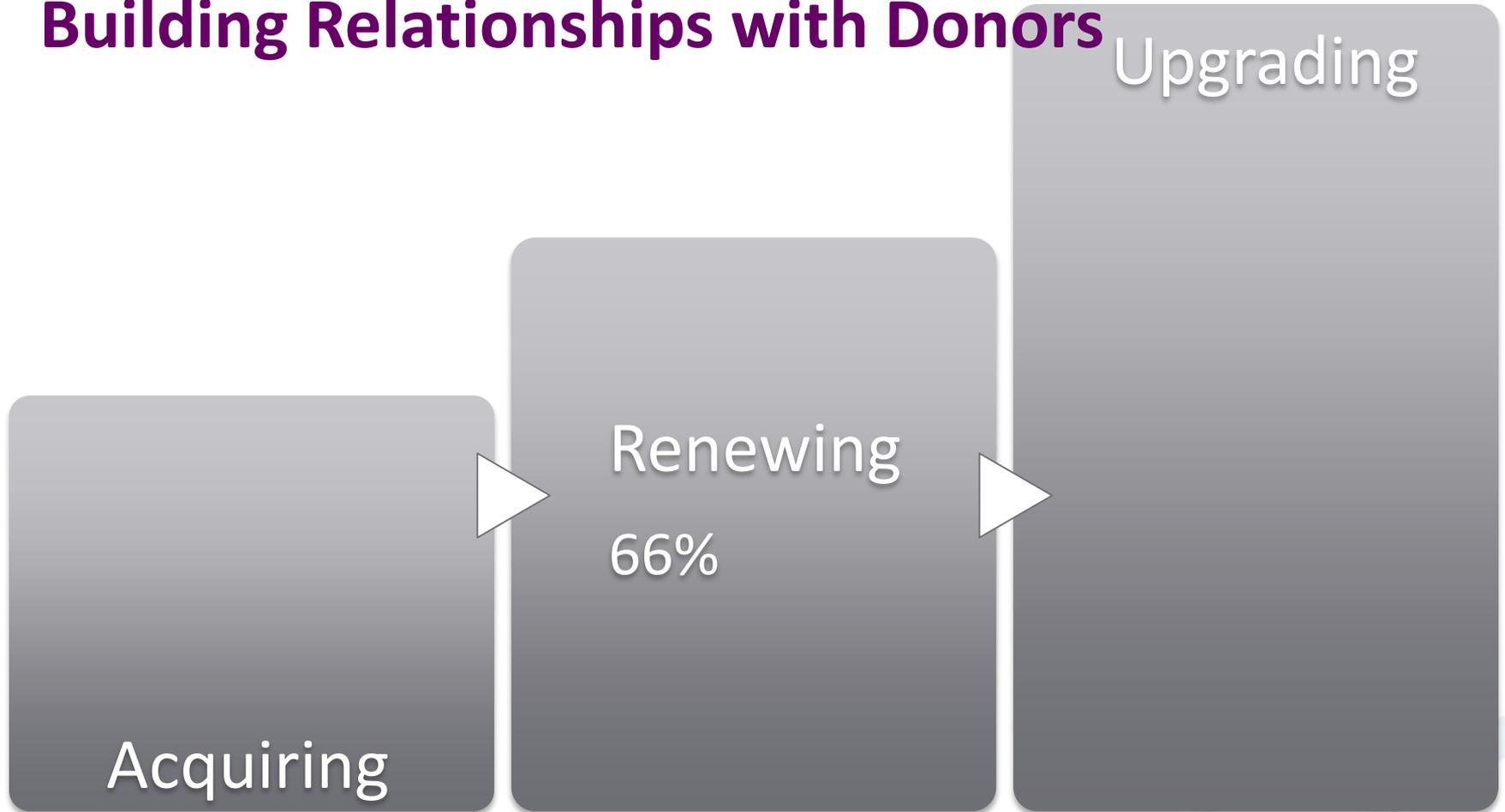


▼ **New Contributors by Quarter**

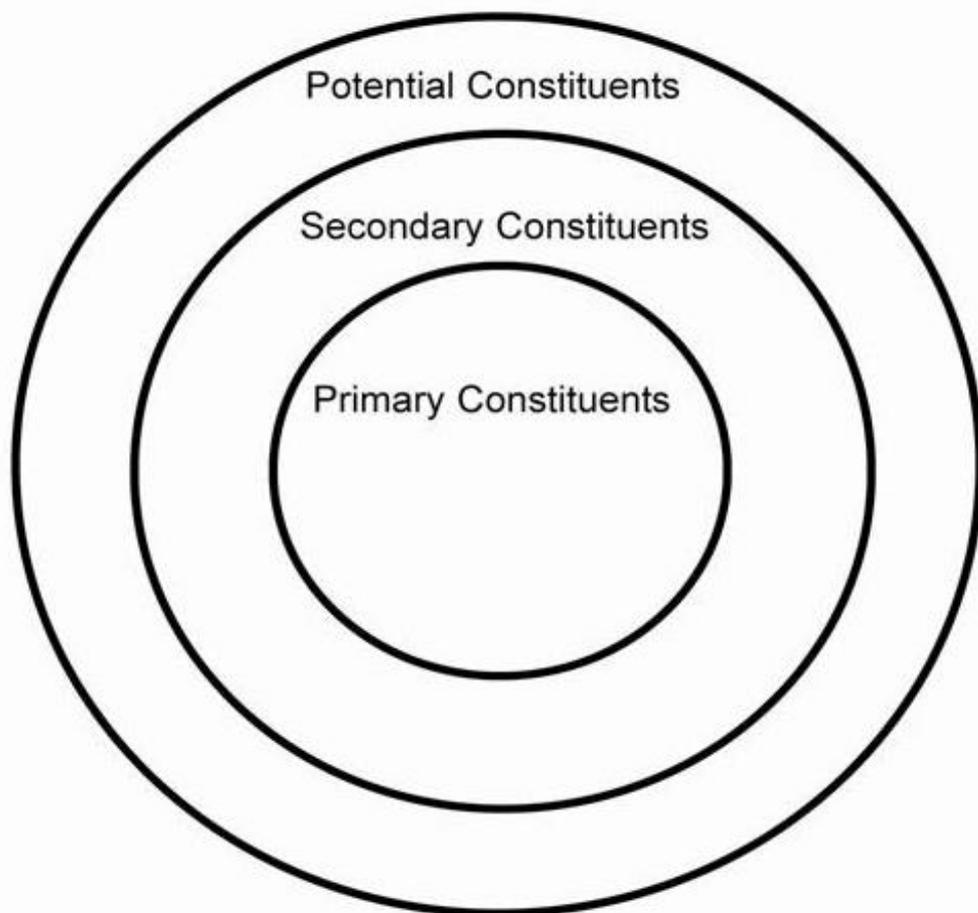


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# Building Relationships with Donors



# Fundraising Constituency Circles



# CiviCRM Home

[Configure Your Dashboard](#)

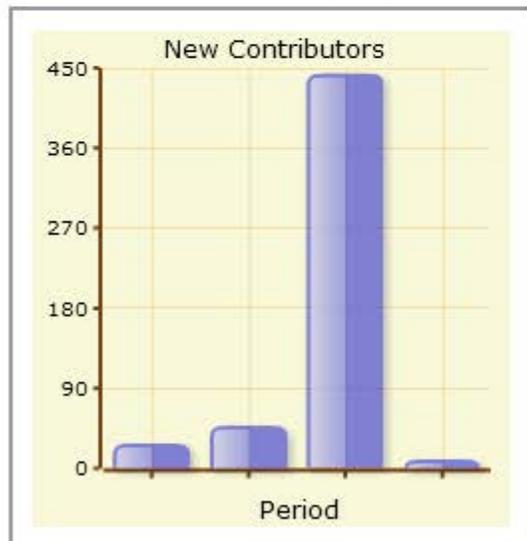
## Key Numbers Report

[Print](#) [Close](#)

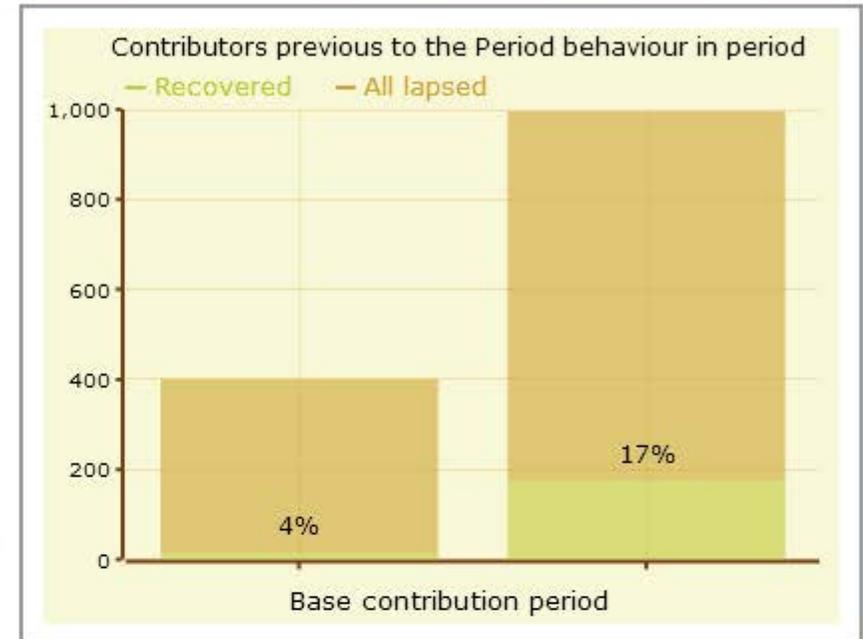
	This Year	Percent Change	Last Year
Total Number of Donors	277	-38%	446
Amount Raised	\$ 17,556.00	-69%	\$ 57,087.00
Amount Raised From Individuals	\$ 17,556.00	-69%	\$ 57,087.00
Average Donation From Individuals	\$ 63.00	-50%	\$ 128.00
Individual Donors who Increased their donation	22	1000%	2
Sustaining Members	0	0%	0
New Contacts in Database	49	n/a	0

## New Contributors by Quarter

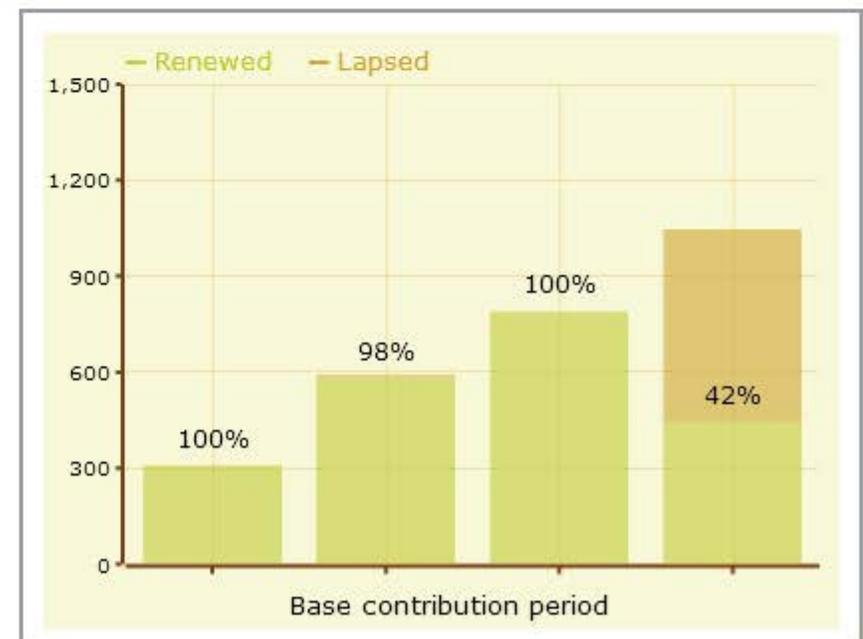
[Print](#) [Close](#)



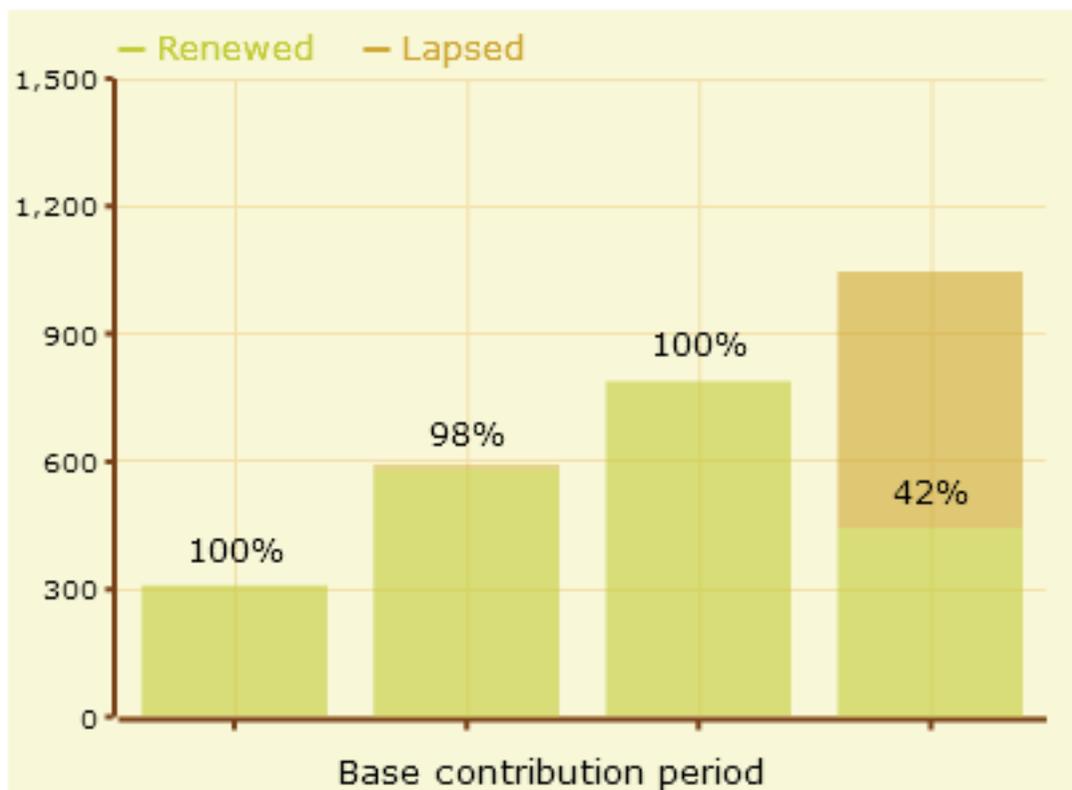
## Contributor Recovery Report



## Annual Renewal Rate

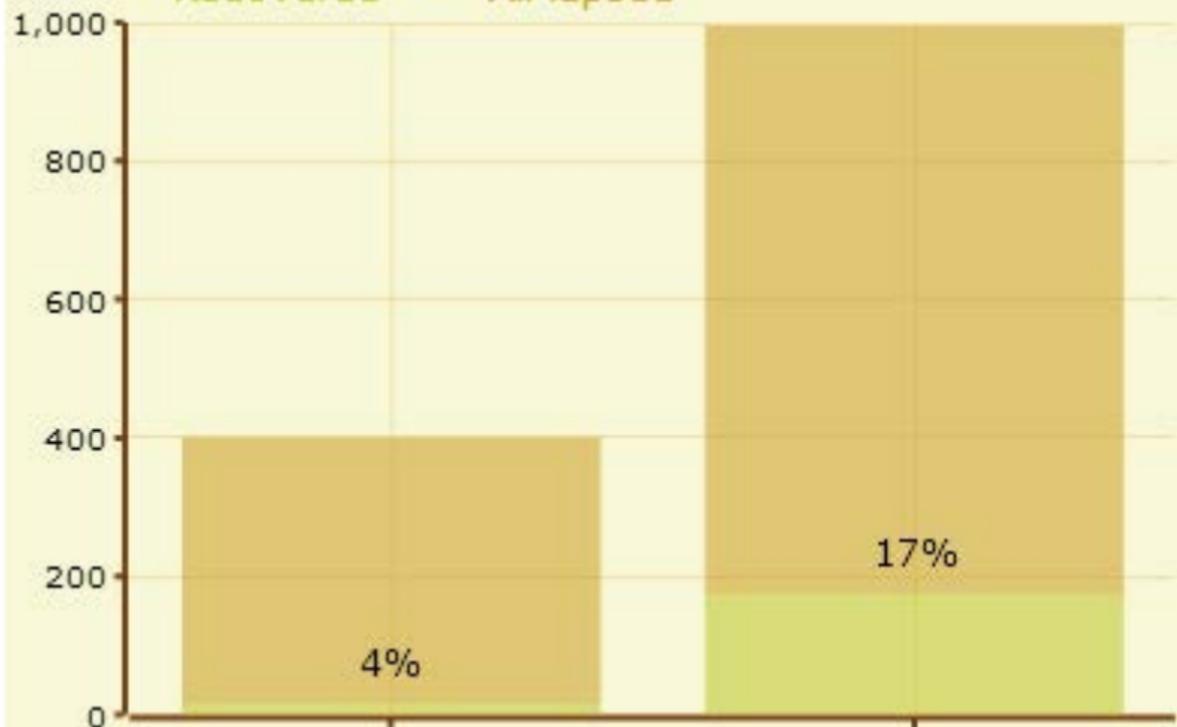


## Annual Renewal Rate

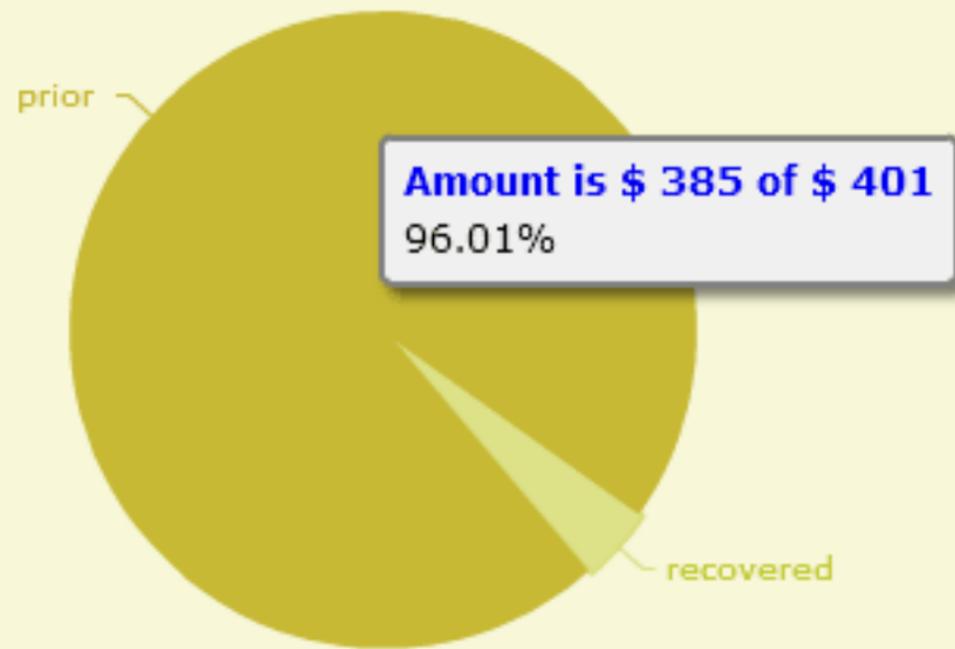


### Contributors previous to the Period behaviour in period

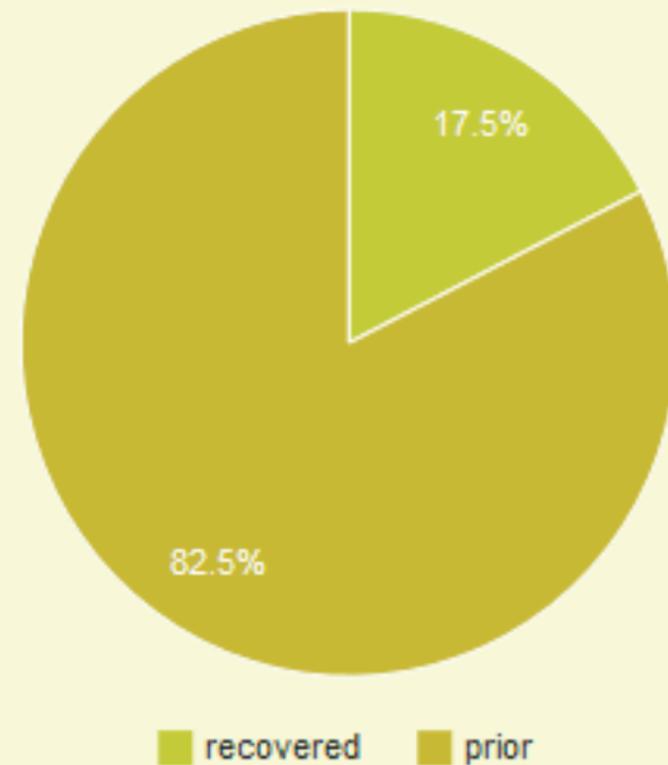
— Recovered — All lapsed



### Contributors previous to the Period behaviour in period



### Contributors previous to the Period behaviour in period



## DashBoard Worksheet

Dashboard	Current	Last Year	Target	Notes
Number of individual donors				
Amount raised from individuals				
Average individual gift				
Number of new donors				
Renewal rate				
% of donors who increased their gift				
Number of sustainers				
Number of new contacts added to PowerBase				
% growth in database				

# 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

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

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- 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@progressivetech.org](mailto:support@progressivetech.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/>

## Introduction

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The **PowerBase Key Numbers Report** is designed to give you a quick look at the state of your fundraising and database growth rate. It gives you comparative year over year (or other time period) results for fields like these:

- Total Number of Donors
- Total Number of Individual Donors
- Total Number of Organization Donors
- Amount Raised
- Amount Raised From Individuals
- Amount Raised From Organizations
- Average Donation
- Average Donation From Individuals
- Average Donation From Organizations
- Donors who Increased their donation
- Individual Donors who Increased their donation
- Organization Donors who Increased their donation
- Active Pledges
- Active Recurring Contributions
- Sustaining Members
- Largest Donation
- Largest Donation From Individuals
- Largest Donation From Organizations
- Smallest Donation
- Smallest Donation From Individuals
- Smallest Donation From Organizations
- New Contacts in Database
- New Individuals in Database
- New Organizations in Database

## Preparing to Run the Report

---

The **PowerBase Key Numbers Report** is one of the Contribution Reports Templates available off of the **Reports>Contribution Reports** menu's **New Contribution Report** button. It will be available as a template only after two software extensions have been enabled on your site. If it's not there, you'll have to install the software extensions. It's outside the scope of this document to describe installing the software extensions, so see your PowerBase administrator or reach out to PowerBase Support for assistance installing them.

This is an easy report to create, but if you've never created a report, you might find it helpful to review the **Creating Reports – Basics** document before proceeding. This document will assume that you are familiar with the basic report creation process in PowerBase.

## Setting Filters

The screenshot shows the 'Key Numbers Report - Template' interface. It features a 'Report Criteria' section with a 'Set Filters' sub-section. The filters are organized into rows, each with a label, a dropdown menu, and a list of options. The filters include:

- Selected Performance Indicators:** 'Is one of' dropdown with options: Total Number of Donors, Total Number of Individual Donors, Total Number of Household Donors, Total Number of Organization Donors.
- Report Main Date Range:** 'Prior to Previous Year' dropdown.
- Contribution Status:** 'Is one of' dropdown with options: Completed, Pending, Cancelled, Failed.
- Financial Type:** 'Is one of' dropdown with options: Campaign Contribution, Donation, Event Fee, Member Dues.
- Payment Type:** 'Is one of' dropdown with options: Credit Card, Debit Card, Cash, Check.
- Contribution Amount:** 'Is less than or equal to' dropdown with an empty input field.
- Campaign:** 'Is one of' dropdown with options: Fundraising Campaign, Lead Poisoning Abatement, Take Back the American Dream 2011.
- Group:** 'Is one of' dropdown with options: Immigrant rights interest in 44505, FR All Donors 2012, FR Donor Solicitors, FR Funders & Foundations Proposals sent.

A 'Preview Report' button is located at the bottom left of the form.

The important parameters to set with filters are the performance indicators, the time frame, and the financial types to be included in the report.

Performance Indicators are set of numbers that mostly analyze fundraising information, with one exception – the change in count of contacts in PowerBase. Most can be broken out by Individual, Organization and Household (if it's in use).

The time frame is usually comparing year-to-date again last-year-to-date, but any time period can be selected.

Financial types filtering allows you to exclude merchandise, event fees or other unrelated income from the totals.

Of the remaining filters, the group filter is especially useful for selecting a subset of donors or members in your PowerBase. In this way you can have a report that specifically covers how the individual donor campaign is proceeding, for instance.

The change in count in the database is not affected by filtering for a group or financial type.

Note: You select additional parameters or deselect a parameter by using the Ctrl key and clicking on the item.

## Preview Report

Click on Preview Report to bring the results up.

Selected Performance Indicators Is one of Total Number of Donors, Amount Raised, Amount Raised From Individuals, Average Donation From Individuals, Individual Donors who Increased their donation, Sustaining Members, New Contacts in Database

Report Main Date Range Between January 1, 2011 and December 31, 2011

Contribution Status Is Completed

Group Is FR All Donors 2012

	Main Date Range	Percent Change	One year Prior Range
Total Number of Donors	444	1%	440
Amount Raised	\$ 105,297.00	8%	\$ 97,100.00
Amount Raised From Individuals	\$ 105,297.00	8%	\$ 97,100.00
Average Donation From Individuals	\$ 237.00	7%	\$ 221.00
Individual Donors who Increased their donation	378	57%	241
Sustaining Members	0	0%	0
New Contacts in Database	446	n/a	0

You can drill down by clicking on the numbers in blue. This will bring up the Donor Behaviour Detail Report showing the supporting details. The Donor Behaviour Detail Report is described in a separate document.

One you preview your report, you have the option of saving it and, optionally, to make it available for a Home page Dashboard. Details of that process are explained in the **Creating Reports – Basics** document referred to above.

Home » CiviCRM

**CiviCRM Home**

Configure Your Dashboard

Key Numbers Report for Major Donors

	Main Date Range	Percent Change	One year Prior Range
Total Number of Donors	444	1%	440
Amount Raised	\$ 105,297.00	8%	\$ 97,100.00
Amount Raised From Individuals	\$ 105,297.00	8%	\$ 97,100.00
Average Donation From Individuals	\$ 237.00	7%	\$ 221.00
Individual Donors who Increased their donation	378	57%	241
Sustaining Members	0	0%	0
New Contacts in Database	446	n/a	0

This is how the report appears on the Home page Dashboard.

## Introduction

---

The **Contribution Renewals Report** is designed to give you a quick look at the number and rate of renewed donors for multiple time periods. Organizations strive to have a healthy renewal rate. A suggested target renewal rate is 66 percent of the donors each year. This report provides that information at a glance.

The reporting interval for defaults to 12 months, but can be changed. The duration of time to include a donation as a renewal defaults to 12 months, but it can be changed. Some groups consider a renewal any amount that comes in within 18 months after the latest contribution. Results can be displayed as a list or as a bar chart. The report will also provide these subtotals for each time period selected:

- Total Amount Contributed
- Total Number of Contributions
- Average Value of Contribution
- Largest Contribution
- Smallest Contribution

## Preparing to Run the Report

---

The **Contribution Renewals Report** is one of the Contribution Reports Templates available off of the **Reports>Contribution Reports** menu's **New Contribution Report** button. It will be available as a template only after two software extensions have been enabled on your site. If it's not there, you'll have to install the software extensions. It's outside the scope of this document to describe installing the software extensions, so see your PowerBase administrator or reach out to PowerBase Support for assistance installing them.

This is an easy report to create, you can accept the defaults and click preview report to see the results, but if you've never created a report, you might find it helpful to review the **Creating Reports – Basics** document before proceeding. This document will assume that you are familiar with the basic report creation process in PowerBase.

# Setting Filters

**Contribution Renewals Report - Template**

▼ Report Criteria

**Set Filters**

Cut-off date	Is equal to ▼	12/31/2012	(clear)
Contribution Time Interval	Is equal to ▼	12	
Renewal timeframe	Is equal to ▼	12	
Number of periods to show	Is equal to ▼	4 ▼	
Contribution Status	Is one of ▼	Completed Pending Cancelled Failed	
Financial Type	Is one of ▼	Campaign Contribution Donation Event Fee Member Dues	
Payment Type	Is one of ▼	Credit Card Debit Card Cash Check	
Contribution Amount	Is less than or equal to ▼		
Campaign	Is one of ▼	Fundraising Campaign Lead Poisoning Abatement Middlefield Issues C4 Take Back the American Dream 2011	
Tag	Is one of ▼	Follow Up	
Group	Is one of ▼	_Immigrant rights interest in 44505 FR All Donors 2012 FR Donor Solicitors FR Donors	

Preview Report

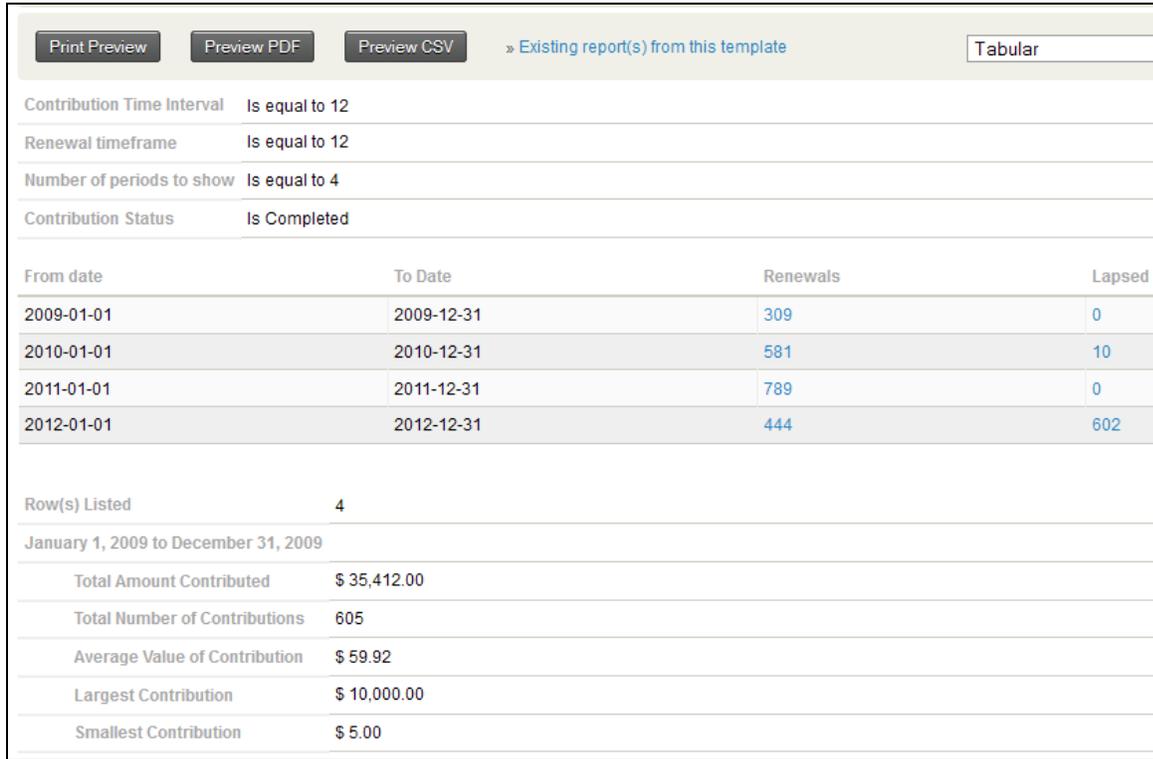
Filter Setting	Description
<b>Cut-off date</b>	This is date is the date of the last interval included in the report. Defaults to the end of the prior year.
<b>Contribution Time Interval</b>	The Interval of reporting cutoff dates. 12 months will show results every year.
<b>Renewal timeframe</b>	Length of time following an initial donation in which another donation must be made to be considered a renewal
<b>Number of periods to show</b>	Number of intervals where a counts and rates will be captured
<b>Contribution Status</b>	Defaults to "Completed". No need to change this in most situations.
<b>Financial Type</b>	Pick the Financial Types that are significant as donations. Exclude merchandise, event fees and other unrelated income. If you don't pick any, all will be included.
<b>Payment Type</b>	In most cases, there is no need to pick any of these. If none is selected, then all Payment types will be included.
<b>Contribution Amount</b>	If you have a reason to filter for donation size, this is the place to set the donation size and the rules you would like to apply.
<b>Campaign</b>	Defaults to all Campaigns
<b>Tag</b>	Defaults to all Tags, if none is selected
<b>Group</b>	Defaults to every contact, if no group is selected.

## Preview Report

Click on Preview Report to bring the results up. The initial results will be in Tabular form, but you can change it.



A screenshot of a web interface showing a dropdown menu with 'Tabular' selected and a 'View' button to its right. Below the dropdown are several empty rows, suggesting a list of options or a table.



A screenshot of a report preview interface. At the top, there are buttons for 'Print Preview', 'Preview PDF', and 'Preview CSV', followed by a link '» Existing report(s) from this template' and a dropdown menu set to 'Tabular'. Below this are filter settings: 'Contribution Time Interval Is equal to 12', 'Renewal timeframe Is equal to 12', 'Number of periods to show Is equal to 4', and 'Contribution Status Is Completed'. The main data table has columns for 'From date', 'To Date', 'Renewals', and 'Lapsed'. The data rows are for the years 2009, 2010, 2011, and 2012. Below the table, it shows 'Row(s) Listed 4' and a summary for 'January 1, 2009 to December 31, 2009' with metrics like 'Total Amount Contributed \$ 35,412.00', 'Total Number of Contributions 605', 'Average Value of Contribution \$ 59.92', 'Largest Contribution \$ 10,000.00', and 'Smallest Contribution \$ 5.00'.

From date	To Date	Renewals	Lapsed
2009-01-01	2009-12-31	309	0
2010-01-01	2010-12-31	581	10
2011-01-01	2011-12-31	789	0
2012-01-01	2012-12-31	444	602

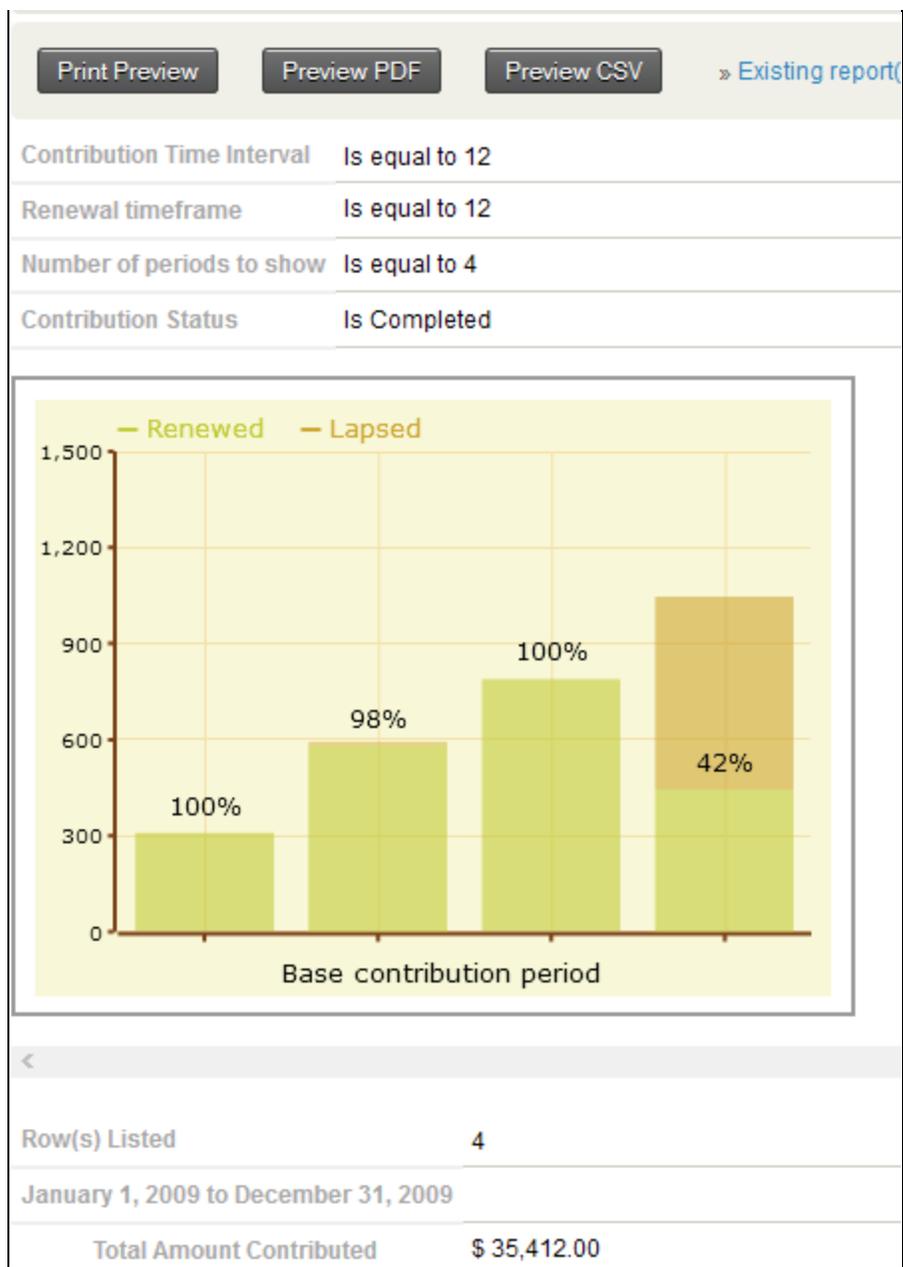
Row(s) Listed	4
January 1, 2009 to December 31, 2009	
Total Amount Contributed	\$ 35,412.00
Total Number of Contributions	605
Average Value of Contribution	\$ 59.92
Largest Contribution	\$ 10,000.00
Smallest Contribution	\$ 5.00

You can drill down by clicking on the numbers in blue. This will bring up the **Donor Behaviour Detail Report** showing the supporting details. The **Donor Behaviour Detail Report** is described in a separate document.

### Bar Chart

To change it to a Bar Chart Report, change the View field from “Tabular” to “Bar Chart” and click View.

The result will be something like this next screenshot.

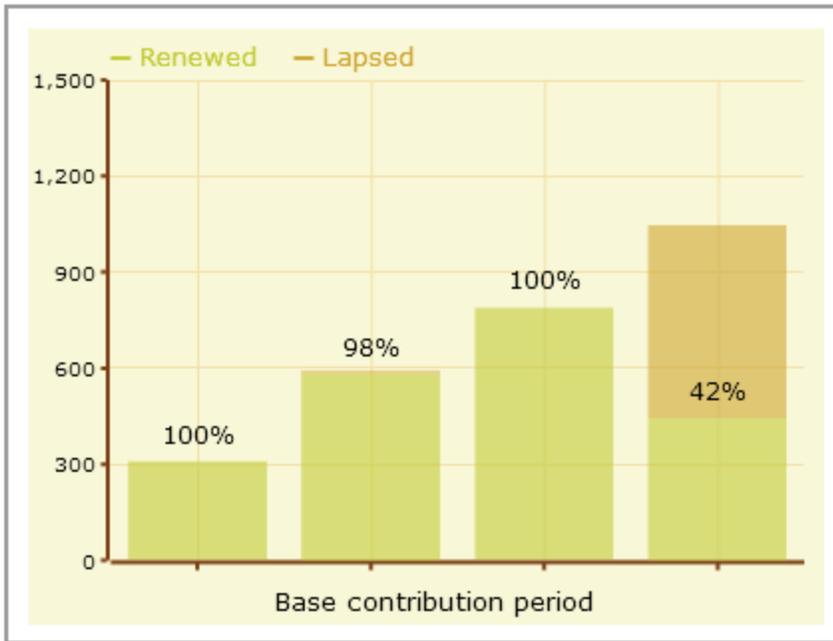


### Dashboard

One you preview your report, you have the option of saving it and, optionally, to make it available for a Home page Dashboard. Details of that process are explained in the **Creating Reports – Basics** document referred to above.

This is how the bar chart would appear on the dashboard. Remember that you will have to occasionally update the period end date to keep it current.

Annual Renewal Rate



# Contributor Recovery Report

## Introduction

---

The **Contributor Recovery Report** is designed to give you a quick look at the number and rate of recovered donors in two time periods. Lapsed donors are a potential source of new donations and recovering them as current donors is a measure of the success of fundraising effort. This report provides that information at a glance.

The reporting interval for defaults to 12 months, but can be changed. The duration of time to include a donation as a recovered defaults to 12 months, but it can be changed. Not all historical donations need to be included in the calculation: by default this is limited to 60 months. Results can be displayed as a list, a bar chart or as two pie charts. The report will also provide these subtotals for each time period selected:

- Total Amount Contributed
- Total Number of Contributions
- Average Value of Contribution
- Largest Contribution
- Smallest Contribution

## Preparing to Run the Report

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The **Contributor Recovery Report** is one of the Contribution Reports Templates available off of the **Reports>Contribution Reports** menu's **New Contribution Report** button. It will be available as a template only after two software extensions have been enabled on your site. If it's not there, you'll have to install the software extensions. It's outside the scope of this document to describe installing the software extensions, so see your PowerBase administrator or reach out to PowerBase Support for assistance installing them.

This is an easy report to create, you can accept the defaults and click preview report to see the results – but if you've never created a report, you might find it helpful to review the **Creating Reports – Basics** document before proceeding. This document will assume that you are familiar with the basic report creation process in PowerBase.

## Setting Filters

---

# Contributor Recovery Report

## Contributor Recovery Report - Template

Filter Setting	Description
<b>Cut-off date</b>	This is date is the date of the last interval included in the report. Defaults to the end of the prior year.
<b>Contribution Time Interval</b>	The Interval of reporting cutoff dates. 12 months will show results every year.
<b>Renewal timeframe</b>	Period during which another donation must be made to be considered a renewal. If a donor has made a prior contribution and this period of time expires afterwards without another donation, the donor is considered to be lapsed. Donors who subsequently make a donation after this length of time are classified as Recovered Donors.
<b>Number of months to look back</b>	Limits the period of time that will be included in the calculation. Use it to tell the software to only include relatively recent donations. If too much time has passed since a donor contributed, it's probably better to think of them as a new donor. This should be set to your organization's standard. For example, some organizations only try to recover lapsed donors who gave in the last three years.
<b>Contribution Status</b>	Defaults to "Completed". No need to change this in most situations.
<b>Financial Type</b>	Pick the Financial Types that are significant as donations. Exclude merchandise, event fees and other unrelated income. If you don't pick any, all will be included.
<b>Payment Type</b>	In most cases, there is no need to pick any of these. If none is selected, then all Payment types will be included.
<b>Contribution Amount</b>	If you have a reason to filter for donation size, this is the place to set the donation size and the rules you would like to apply.
<b>Campaign</b>	Defaults to all Campaigns
<b>Tag</b>	Defaults to all Tags, if none is selected
<b>Group</b>	Defaults to every contact, if no group is selected.

# Contributor Recovery Report

## Preview Report

Click on Preview Report to bring the results up. The initial results will be in Tabular form, but you can change it.

Print Preview		Preview PDF		Preview CSV		Tabular		View	
Contribution Time Interval		Is equal to 12							
Renewal timeframe		Is equal to 12							
Number of months to look back		Is equal to 60							
Contribution Status		Is Completed							
From date		To Date		Recovered Donors		Lapsed			
2011-10-01		2012-09-30		16		385			
2012-10-01		2013-09-30		174		821			
Row(s) Listed		2							
October 1, 2011 to September 30, 2012									
Total Amount Contributed		\$ 122,268.00							
Total Number of Contributions		1,157							
Average Value of Contribution		\$ 184.42							
Largest Contribution		\$ 5,075.00							
Smallest Contribution		\$ 20.00							

You can drill down by clicking on the numbers in blue. This will bring up the **Donor Behaviour Detail Report** showing the supporting details. The **Donor Behaviour Detail Report** is described in a separate document.

### Bar Chart

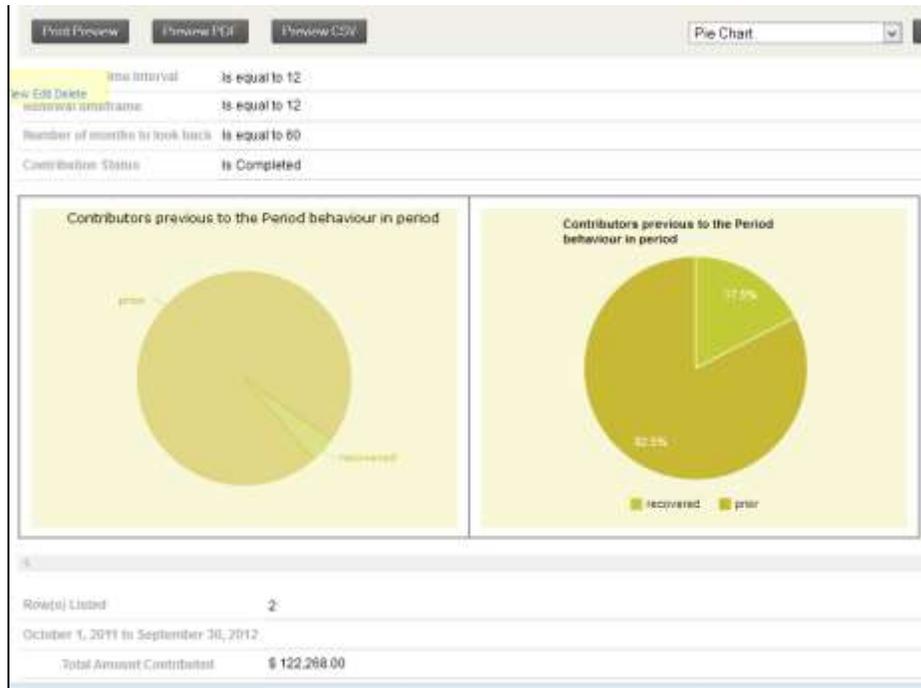
To change it to a Bar Chart Report, change the View field from “Tabular” to “Bar Chart” and click View. The result will be something like this next screenshot.



# Contributor Recovery Report

## Pie Charts

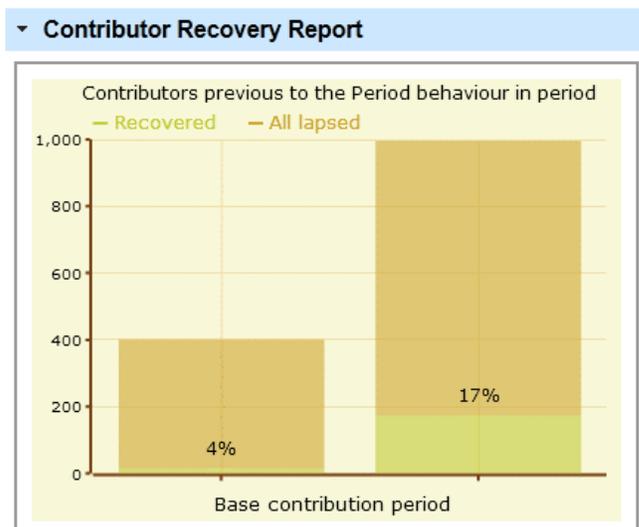
To change it to a Pie Chart Report, change the View field “Pie Chart” and click View. The result will be something like this next screenshot.



## Dashboard

Once you preview your report, you have the option of saving it and, optionally, to make it available for a Home page Dashboard. Details of that process are explained in the **Creating Reports – Basics** document referred to above.

This is how the bar chart would appear on the dashboard. Remember that you will have to occasionally update the period end date to keep it current.



## Introduction

---

The **New Contributor Report** is designed to give you a quick look at the number of new donors for multiple time periods. It gives you a count of the new donors for the time periods you select. Time period length defaults to quarters, but can be annual, semi-annual or monthly as well. It can be displayed as a list or as a bar chart. The report will also provide these subtotals for each time period selected:

- Total Amount Contributed
- Total Number of Contributions
- Average Value of Contribution
- Largest Contribution
- Smallest Contribution

## Preparing to Run the Report

---

The **New Contributor Report** is one of the Contribution Reports Templates available off of the **Reports>Contribution Reports** menu's **New Contribution Report** button. It will be available as a template only after two software extensions have been enabled on your site. If it's not there, you'll have to install the software extensions. It's outside the scope of this document to describe installing the software extensions, so see your PowerBase administrator or reach out to PowerBase Support for assistance installing them.

This is an easy report to create, you can accept the defaults and click preview report to see the results, but if you've never created a report, you might find it helpful to review the **Creating Reports – Basics** document before proceeding. This document will assume that you are familiar with the basic report creation process in PowerBase.

## Setting Filters

Home » CiviCRM » Report Templates

### New Contributor Report - Template

Report Criteria

**Set Filters**

End Date of Reporting Period	Is equal to		06/30/2013	(clear)
Contribution Time Interval	Is equal to		Quarterly	
Number of periods to show	Is equal to		4	
Number of months to look back	Is equal to		120	
Contribution Status	Is one of		Completed Pending Cancelled Failed	
Financial Type	Is one of		Campaign Contribution Donation Event Fee Member Dues	
Payment Type	Is one of		Credit Card Debit Card Cash Check	
Contribution Amount	Is less than or equal to			
Campaign	Is one of		Fundraising Campaign Lead Poisoning Abatement Take Back the American Dream 2011	
Group	Is one of		_Immigrant rights interest in 44505 FR All Donors 2012 FR Donor Solicitors FR Funders & Foundations Proposals sent	

Preview Report

Filter Setting	Description
<b>End Date of Reporting Period</b>	Defaults to the end of the last quarter, but it can be changed
<b>Contribution Time Interval</b>	Defaults to Quarterly, but can be Monthly, 6 Months, or Annual
<b>Number of periods to show</b>	Defaults to 4, but can be changed. You might select 5 to see results of the same quarter last year, for instance.
<b>Number of months to look back</b>	Defaults to 120 which is 10 years. The "look back" period excludes the donors who gave more than once during this period. If you consider a new donor to be someone who hasn't given in 5 years, you would change this to 60 months.
<b>Contribution Status</b>	Defaults to "Completed". No need to change this in most situations.
<b>Financial Type</b>	Pick the Financial Types that are significant as donations. Exclude merchandise, event fees and other unrelated income. If you don't pick any, all will be included.

<b>Payment Type</b>	In most cases, there is no need to pick any of these. If none is selected, then all Payment types will be included.
<b>Contribution Amount</b>	If you have a reason to filter for donation size, this is the place to set the donation size and the rules you would like to apply. Keep in mind that a new donor may be someone who gave one or more donations at some point which did not meet the criteria that you select.
<b>Campaign</b>	Defaults to all Campaigns
<b>Group</b>	Defaults to every contact If no group is selected.

## Preview Report

Click on Preview Report to bring the results up. The initial results will be in Tabular form, but you can change it.

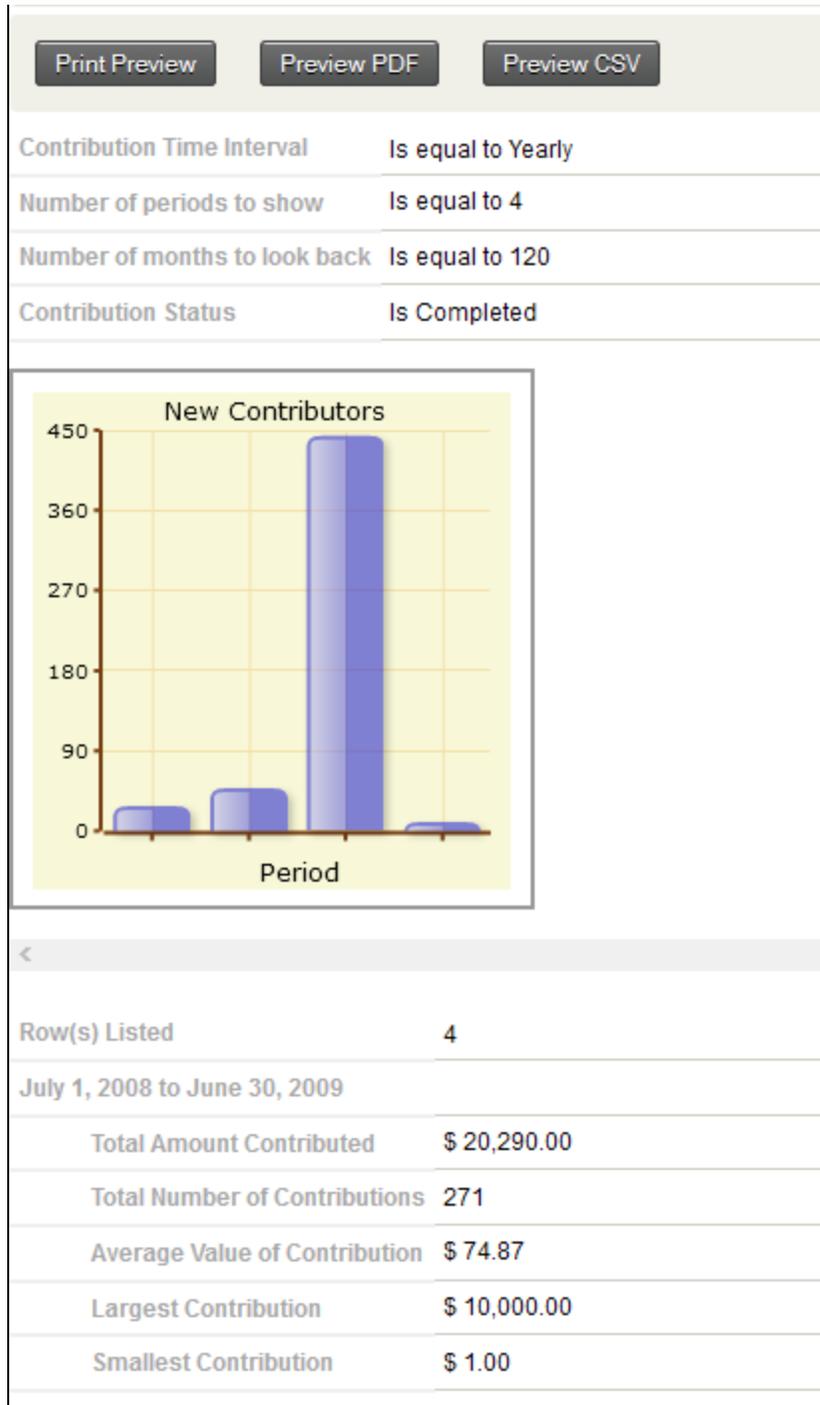
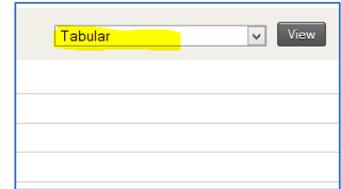
<a href="#">Print Preview</a> <a href="#">Preview PDF</a> <a href="#">Preview CSV</a>		
Contribution Time Interval	Is equal to Yearly	
Number of periods to show	Is equal to 4	
Number of months to look back	Is equal to 120	
Contribution Status	Is Completed	
From date	To Date	New Donors
2008-07-01	2009-06-30	<a href="#">28</a>
2009-07-01	2010-06-30	<a href="#">48</a>
2010-07-01	2011-06-30	<a href="#">444</a>
2011-07-01	2012-06-30	<a href="#">10</a>
Row(s) Listed	4	
July 1, 2008 to June 30, 2009		
Total Amount Contributed	\$ 20,290.00	
Total Number of Contributions	271	
Average Value of Contribution	\$ 74.87	
Largest Contribution	\$ 10,000.00	
Smallest Contribution	\$ 1.00	
July 1, 2009 to June 30, 2010		
Total Amount Contributed	\$ 30,209.00	
Total Number of Contributions	636	
Average Value of Contribution	\$ 51.03	
Largest Contribution	\$ 3,000.00	
Smallest Contribution	\$ 5.00	

You can drill down by clicking on the numbers in blue. This will bring up the **Donor Behaviour Detail Report** showing the supporting details. The **Donor Behaviour Detail Report** is described in a separate document.

## Bar Chart

To change it to a Bar Chart Report, change the View field from “Tabular” to “Bar Chart” and click View.

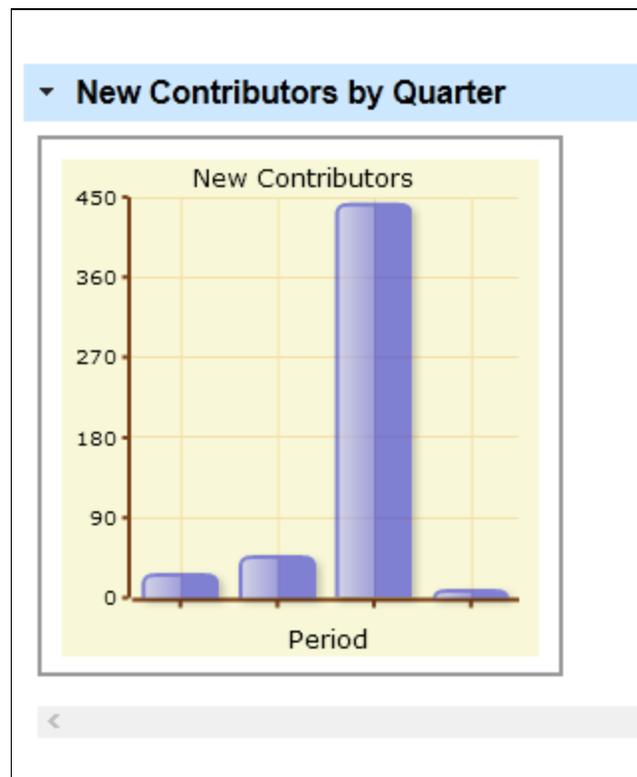
The result will be something like this next screenshot.



## Dashboard

Once you preview your report, you have the option of saving it and, optionally, to make it available for a Home page Dashboard. Details of that process are explained in the **Creating Reports – Basics** document referred to above.

This is how the bar chart would appear on the dashboard. Remember that you will have to occasionally update the period end date to keep it current.



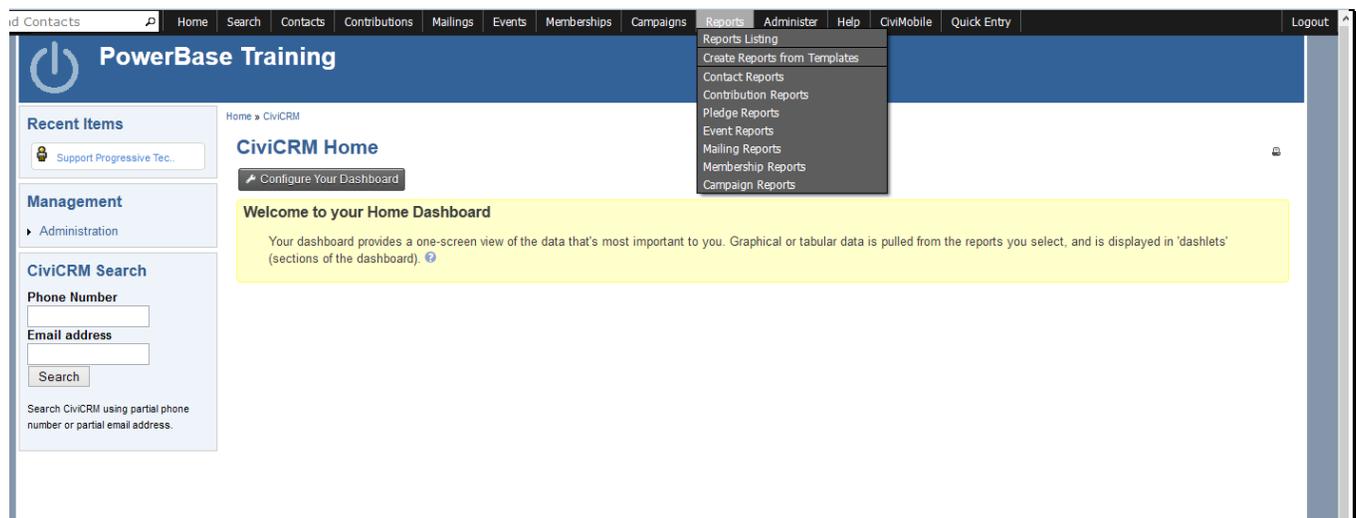
This document gives a general description of the process for creating reports. It describes the features that are common to most reports. The idea is that by reading this you'll have enough information on how reports work to create any report in PowerBase. Of course the details of what you can display,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

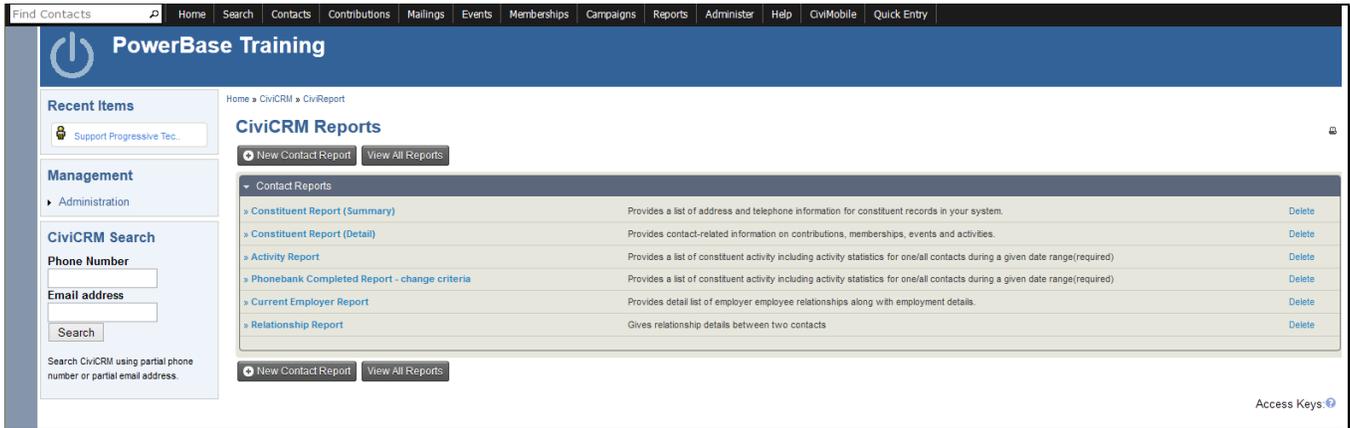
## Reports Menu

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.



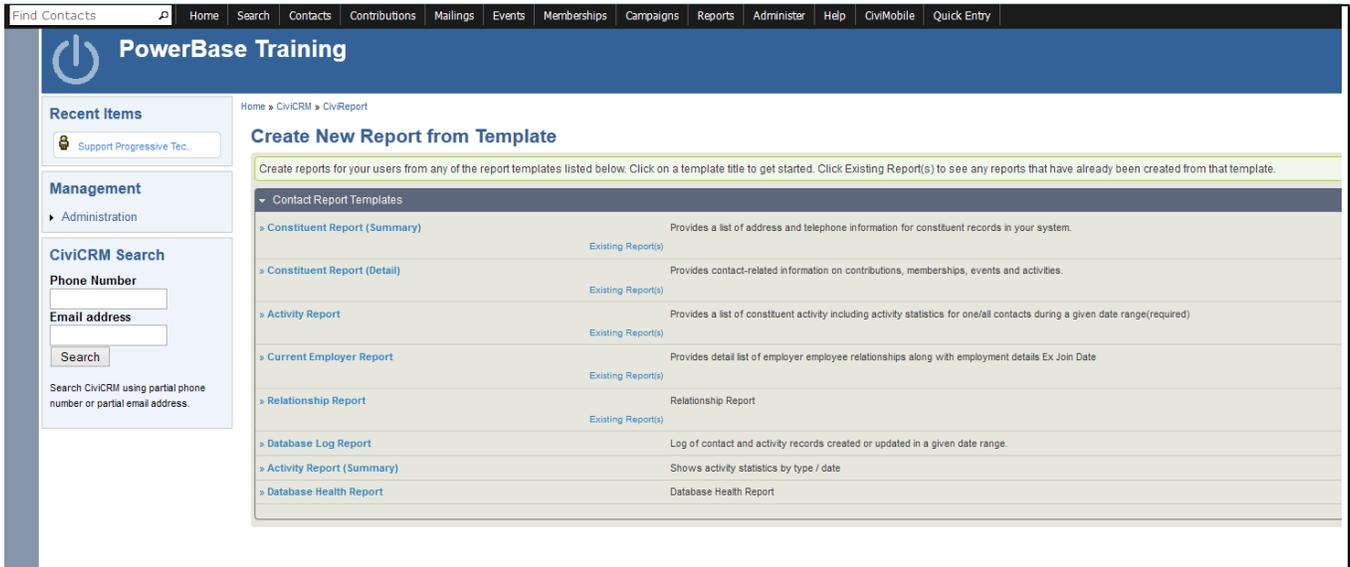
Reports are segmented by the data that they pull together. In almost all reports, you have access to some Contact information. Others will have Contribution, Membership, Event Participation, Pledge, or Mailings details.

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

## 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.

## 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' section at the top, which includes a table with three columns: 'Column', 'Order', and 'Section Header / Group By'. The 'Column' dropdown is set to 'Last Name, First Name', the 'Order' dropdown is set to 'Ascending', and the 'Section Header / Group By' checkbox is unchecked. Below this is a link for 'another column'. The 'Set Filters' section below 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.

**Constituent Report (Summary) - Template**

[Report Criteria](#)  
[Create Report](#)

» Existing report(s) from this template

State / Province

Next > Last >> Records 1 - 50 of 2612
 Page  of 53

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

**Create Report**

**General Settings**

Report Title

Report Description

Report Header

Report Footer

**Email Delivery Settings**

Subject

To

CC

### 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.

## Other Settings

The screenshot shows the 'Other Settings' configuration page for 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 showing "CiviReport access CiviReport".
- ACL Group/Role** A list of roles: "administrator", "anonymous user", "authenticated user", "civicon", and "Powerbase Administrator". To the right of this list are "Add >>" and "<< Remove" buttons, and an empty destination 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.

## PowerBase Donor Activity Matrix

Fundraising Approaches	Donor Capacity	Direct Mail	Phone Bank	Email Appeals	Personal Asks	Peer to Peer: Personal Campaign Pages	Gala Events	Proposals	Convert to Sustainers	Frequency of touches
<b>New Prospects</b>		Maybe	Maybe	Maybe		Yes	Yes			Once or Twice
<b>New Donors</b>	<100	Yes	Yes	Yes			Yes	Yes		Twice
	<250	Yes	Yes	Yes	Maybe		Yes			Twice
	>250				Yes		Yes			Twice
<b>Renewing Donors</b>	<100	Yes	Yes	Yes			Yes		Yes	Annually
	<250	Yes	Yes	Yes	Maybe		Yes		Yes	Semi Annually
	>250				Yes		Yes	Yes	Yes	Quarterly
<b>Recover Lapsed Donors</b>	<100	Yes	Yes	Yes						Annually
	<250	Yes	Yes	Yes	Maybe		Maybe			Annually
	>250				Yes		Yes	Yes		Annually
<b>Grassroots Members</b>	<100	Yes	Yes	Yes		Yes	Yes		Yes	Monthly
	<250	Yes	Yes	Yes	Maybe	Yes	Yes		Yes	Monthly
	>250 (Usually N/A)				Yes	Yes	Yes	Yes	Yes	Monthly
<b>Foundations</b>					Yes		Yes	Yes		Quarterly

# Comparing PowerBase Fundraising Activities

<b>Fundraising Approaches</b>	<b>Direct Mail</b>	<b>Phone Bank</b>	<b>Email Appeals</b>	<b>Personal Asks</b>	<b>Peer to Peer: Personal Campaign Pages</b>	<b>Gala Events</b>	<b>Proposals</b>	<b>Convert to Sustainers</b>
<b>The Amount of Effort</b>	Moderate to Intensive	Intensive	Light	Intensive	Intensive	Intensive	Moderate	Moderate
<b>Who</b>	Staff or Vendor	Staff; Members; Board	Staff	Staff; Members; Board	Members with Staff Support	Staff; Members; Board	Staff	Staff
<b>Additional Cost</b>	Expensive	Cheap	Cheap	Cheap	Cheap	Expensive	Cheap	Cheap
<b>Conversion Rate</b>	Low	Moderate	Low	High	High	Moderate	Depends	Moderate
<b>Payback for Effort and Cost</b>	Low	Low	High	Moderate	High	Low	High	High
<b>Frequency</b>	Quarterly or less often	Can be annual, quarterly or monthly	Quarterly or more often	Annual	Annual or semi-annual	Annual	On going	On going

## Personal Ask Work Sheet

Fundraising Approaches	Donor Capacity	Personal Asks	How Many	Average Amount	Total Expected	Cost	Net Expected	Lead	Who Helps	Notes
New Prospects	<100									
	<250	Maybe								
	>250	Yes								
Renewing Donors	<100									
	<250	Maybe								
	>250	Yes								
Recover Lapsed Donors	<100									
	<250	Maybe								
	>250	Yes								
Grassroots Members	<100									
	<250	Maybe								
	>250 (Usually N/A)	Yes								

## Event Planning Worksheet

Fundraising Approaches	Donor Capacity	Gala Events	How Many	Average Amount	Total Expected	Cost	Net Expected	Lead	Who Helps	Notes
New Prospects		Yes								
New Donors	<100	Yes								
	<250	Yes								
	>250	Yes								
Renewing Donors	<100	Yes								
	<250	Yes								
	>250	Yes								
Recover Lapsed Donors	<100									
	<250	Maybe								
	>250	Yes								
Grassroots Members	<100	Yes								
	<250	Yes								
	>250 (Usually N/A)	Yes								
Foundations		Yes								

## Summary Fields Introduction

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

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

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

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

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

After the initial set up, these fields are updated whenever someone modifies the related records. For example, a new contribution of the correct type will automatically change, at minimum, the Total Life Contributions, Total Contributions this Year, Count of Contributions, Average Annual Contribution, Date of Last Contribution and Amount of Last Contribution. If it's the first contribution for this individual or organization, the Date of First Contribution and the Largest Contribution will also be changed.

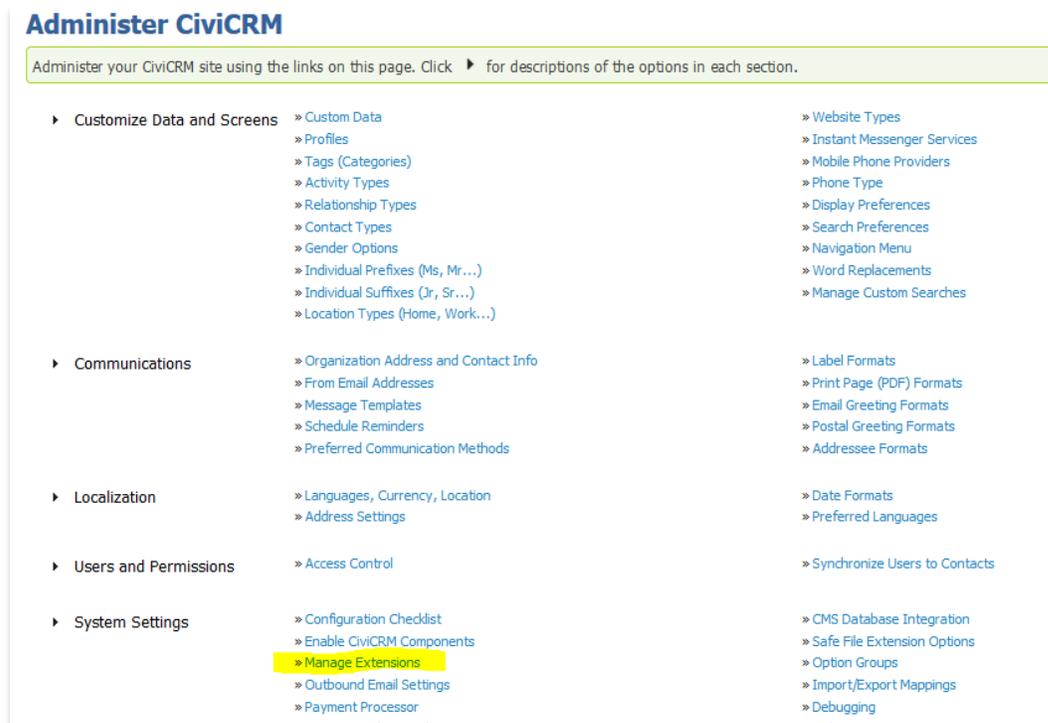
## Summary Fields Setup

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

### Enable the Software Extension

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



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

### Configure the Software

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

You will get a screen with four major headings:

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

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

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

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

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

**SumFields**

**Summary Fields Settings**

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

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

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

Contribution Types  Donation  
 Event Fee  
 Foundation Grant  
 In-Kind  
 Member Dues  
 PowerBase Hosting Fee  
 PowerBase Support Fee  
 PowerBase Training Fee

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

Membership Contribution Types  Donation  
 Event Fee  
 Foundation Grant  
 In-Kind  
 Member Dues  
 PowerBase Hosting Fee  
 PowerBase Support Fee  
 PowerBase Training Fee

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

Event Types  Conference  
 Training  
 Fundraiser  
 Meeting  
 Direct Action  
 Lobby  
 Campaign

Press the “Save” button and the fields will be created and updated. This process can be repeated if you decided to change your configuration. However, if you repeat this process

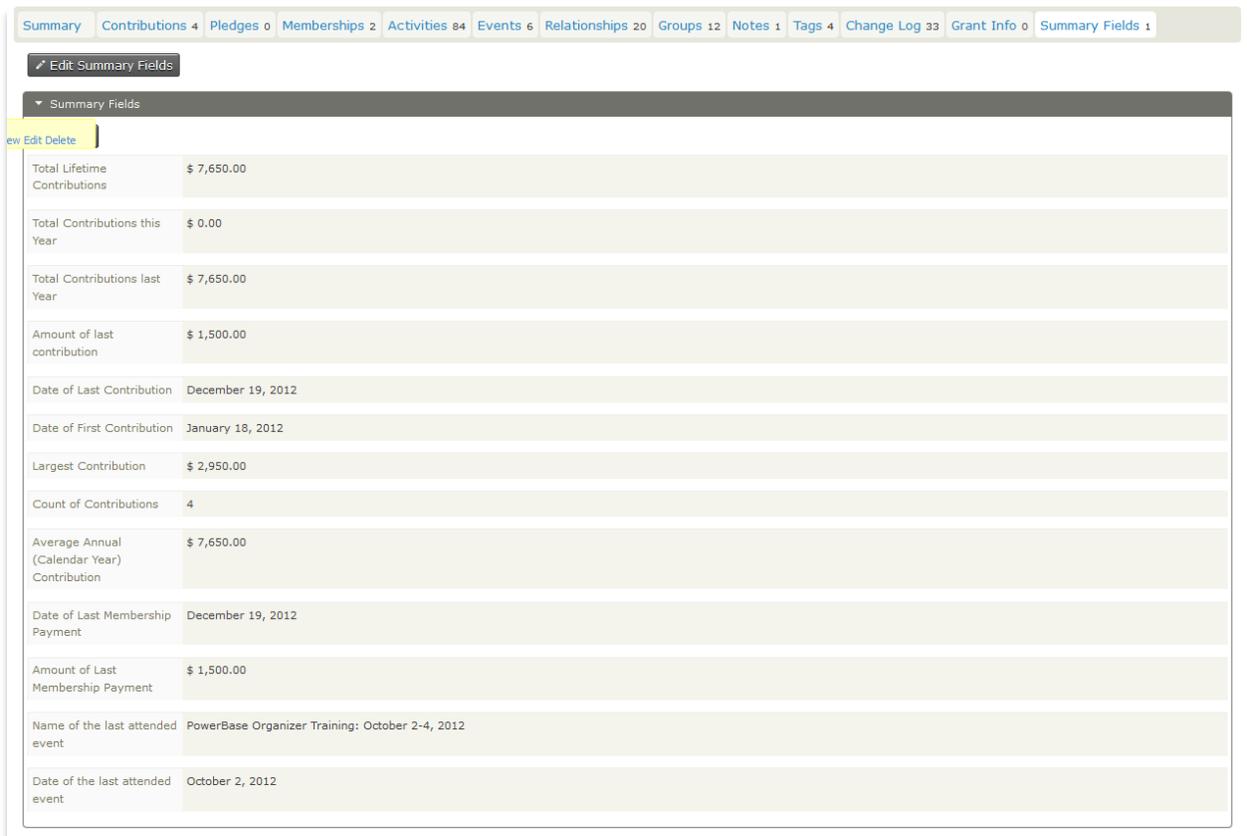
after you have already used these fields in a profile, the profile will no longer work properly. You will have to repair it by re-linking them to the profile.

## Using the Summary Fields

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

### Contact Record Display

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



The screenshot shows a web interface with a navigation bar at the top containing tabs: Summary, Contributions 4, Pledges 0, Memberships 2, Activities 84, Events 6, Relationships 20, Groups 12, Notes 1, Tags 4, Change Log 33, Grant Info 0, and Summary Fields 1. Below the navigation bar is a sub-header "Edit Summary Fields" with a dropdown arrow. Underneath is a "Summary Fields" section with a sub-header and a table of fields. The table has two columns: the field name and its value. The fields and their values are:

Field Name	Value
Total Lifetime Contributions	\$ 7,650.00
Total Contributions this Year	\$ 0.00
Total Contributions last Year	\$ 7,650.00
Amount of last contribution	\$ 1,500.00
Date of Last Contribution	December 19, 2012
Date of First Contribution	January 18, 2012
Largest Contribution	\$ 2,950.00
Count of Contributions	4
Average Annual (Calendar Year) Contribution	\$ 7,650.00
Date of Last Membership Payment	December 19, 2012
Amount of Last Membership Payment	\$ 1,500.00
Name of the last attended event	PowerBase Organizer Training: October 2-4, 2012
Date of the last attended event	October 2, 2012

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

## Advanced Search

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

The screenshot shows a window titled "Summary Fields" with a list of search criteria. Each criterion consists of a label, a "From" field, and a "To" field. Some date fields include a calendar icon and a "(Clear To)" link. The fields are:

- Total Lifetime Contributions From [ ] To [ ]
- Total Contributions this Year From [ ] To [ ]
- Total Contributions last Year From [ ] To [ ]
- Amount of last contribution From [ ] To [ ]
- Date of Last Contribution - From [ ] (Clear Date of Last Contribution - From) To [ ] (Clear To)
- Date of First Contribution - From [ ] (Clear Date of First Contribution - From) To [ ] (Clear To)
- Largest Contribution From [ ] To [ ]
- Count of Contributions From [ ] To [ ]
- Average Annual (Calendar Year) Contribution From [ ] To [ ]
- Date of Last Membership Payment - From [ ] (Clear Date of Last Membership Payment - From) To [ ] (Clear To)
- Amount of Last Membership Payment From [ ] To [ ]
- Name of the last attended event From [ ] To [ ]
- Date of the last attended event - From [ ] (Clear Date of the last attended event - From) To [ ] (Clear To)

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

Contribution Report Templates	Description	Best Use
» Donor Report (Summary)	Shows contribution statistics by month / week / year .. country / state .. type.	Tracking
» Donor Report (Detail)	Lists detailed contribution(s) for one / all contacts. Contribution summary report points to this report for specific details.	Evaluating Donors
» Donation Summary Report (Repeat)	Given two date ranges, shows contacts (and their contributions) who contributed in both the date ranges with percentage increase / decrease.	Tracking to see who has not yet contributed and for Evaluating Donors
» Donation Summary Report (Organization)	Displays a detailed contribution report for Organization relationships with contributors, as to if contribution done was from an employee of some organization or from that Organization itself.	Tracking Matching Donations
» Donation Summary Report (Household)	Provides a detailed report for Contributions made by contributors (Or Household itself) who are having a relationship with household (For ex a Contributor is Head of Household for some household or is a member of.)	Generally not used by PowerBase users
» Top Donors Report	Provides a list of the top donors during a time period you define. You can include as many donors as you want (for example, top 100 of your donors).	Segmenting your Donor Base
» SYBUNT Report	Some year(s) but not this year. Provides a list of constituents who donated at some time in the history of your organization but did not donate during the time period you specify.	Targeting potential donor recovery
» LYBUNT Report	Last year but not this year. Provides a list of constituents who donated last year but did not donate during the time period you specify as the current year.	Tracking to see who has not yet contributed
» Soft Credit Report	Soft Credit details.	Tracking Donor Solicitors
» Bookkeeping Transactions Report	Shows Bookkeeping Transactions Report	Reconciling Contributions with the Accounting System
» Personal Campaign Page Report	Shows Personal Campaign Page Report	Tracking

<b>Contribution Report Templates</b>	<b>Description</b>	<b>Best Use</b>
» <b>Contribution History By Relationship Report</b>	List contact's donation history, grouped by year, along with contributions attributed to any of the contact's related contacts.	Tracking employee donations
» <b>Donor Behaviour Detail</b>	Report displays details for Renewal & Recovery Reports. This one is called from the Donor Source, Key Numbers Report, New Contributor Report, Contributor Recovery Report and Contribution Renewals Report	Provides detail support for checking Fundraising Management Dashboard
» <b>Donor Source</b>	Report displays whether donations in period are from new, renewed or re-activated givers	Fundraising Management Dashboard
» <b>Key Numbers Report</b>	Report displays Key performance Indicators	Fundraising Management Dashboard
» <b>New Contributor Report</b>	Report displays how many contributors have given for the first time	Fundraising Management Dashboard
» <b>Contributor Recovery Report</b>	Report displays how many contributors have lapsed and been recovered	Fundraising Management Dashboard
» <b>Contribution Renewals Report</b>	Report displays how many contributors have continued to contribute	Fundraising Management Dashboard

## Identifying and Assessing Potential Donors

Useful Information	PowerBase	What do WE need?
Donors who gave last year but not this year: 1) Number of donors and total given 2) Names segmented by giving levels, previous solicitor, contribution type, and/or method of contact	LYBUNT Report Advanced Search: Summary Fields Advanced Search: Contributions by custom field Donor Responded to	
Lapsed donors to recover: 1) Number of lapsed donors and total given 2) Names segmented by giving levels, previous solicitor, contribution type, and/or method of contact	SYBUNT Report Advanced Search: Summary Fields Advanced Search: Contributions by custom field Donor Responded to	
This year's donors who could be asked again: 1) Number of current donors 2) Names segmented by giving levels, previous solicitor, contribution type, and/or method of contact	Donation Summary Report Advanced Search: Summary Fields Donor Report (Detail) Donation Summary Report (Repeat)	
Mid-level and major donors	Top Donors Report Advanced Search: Summary Fields Contribution History by Relationship Report Contribution Aggregate Custom Search	
Loyal Donors: Donors who have given 2+ (or more) consecutive years	Donation Summary Report (Repeat) Donor Report (Detail) Advanced Search and Search Builder	
Prospect List: Growth in internal prospecting list	Key Numbers Report	
Income, response rate and average gift on any similar past campaign	Mailing Reports for Campaign Activity Search for direct mail Campaign Contribution Search for Campaign Fundraising Dashboard for Campaign	
Prospective Team: Board members, members, and other constituents organized by their contact	Various	

## Implementing and Managing the Campaign

Useful Information	PowerBase Report	What do WE need?
Number of donations, total amount and donor names attributed to each solicitor	Soft Credit Report	
Number of donations and amount attributed to each contribution type	Donor Report (Summary)	
Donations by gift level: Where are your gaps? Where are you strong? Who should get an immediate and personal acknowledgement?	Donor Report (Summary)	
Donors who haven't yet given to the campaign sorted by solicitor	Repeat Contributions Report	

## Evaluating the Campaign

Useful Information	PowerBase Report	What do WE need?
Number of donations and total amount attributed to each solicitor	Soft Credit Report	
Number of donations, amount and gift average attributed to each contribution type: What were the results of fundraising on multiple channels?	Donor Report (Summary)	
<b>Donations by gift level:</b> How did the results match to your original gift chart?	Donation Report (Summary)	
<b>Number and amount of donations by new, renewed or reactivated donors:</b> Have you brought in new donors, are you closer to a 66% renewal rate for the year, and have you pulled lapsed donors back in?	Fundraising Dashboard for Campaign	
<b>Conversion:</b> Did people who gave to you for the first time last year give through this campaign?	Repeat Contributions Report	
<b>Increased donations:</b> How many donors gave more to the organization as a result of the campaign?	Repeat Contributions Report Fundraising Dashboard for Campaign	
Mid and Major Donors: Did your top donors give through this campaign? Anything more you can do?	Fundraising Dashboard for Campaign Repeat Contributions Report	
<b>Loyal Donors:</b> Did this campaign reach your loyal donors? Anything more you can do?	Repeat Contributions Report Fundraising Dashboard for Campaign	

## People with Valid Postal Addresses

GEN Good Postal Addresses Group

Search>Search Builder

Home » CiviCRM » Find Contacts

### Search Builder

▼ Search Criteria ?

**Include contacts where**

Contacts ▼ Postal Code ▼ Primary ▼ IS NOT NULL ▼

» Another search field

» Also include contacts where

Search

## People with Valid Email Addresses

GEN Good Email Addresses Group

Search>Advanced Search

Home » CiviCRM » Find Contacts

### Advanced Search

▼ Search Criteria ?

▼ Basic Criteria

Complete OR Partial Name	Complete OR Partial Email	Search Views ?	Display Results As ?
<input type="text"/>	%@%	Search View: Name Address Constituent type ▼	Contacts ▼
Contact Type(s)	Group(s) (search by group type)	Search Operator ?	<input type="checkbox"/> Search in Trash (deleted contacts)
- select - ▼	- select - ▼	AND ▼	
Select Tag(s)	All Tags ?		
- select - ▼	<input type="text"/>		
Phone Number	Phone Location	Phone Type	
<input type="text"/>	- any - ▼	- any - ▼	

*Punctuation and spaces are ignored.*

Exclude  Include by Privacy Option(s) ?

Preferred Communication Method

Phone  Email  Postal Mail  SMS  Fax

## Donors who gave last year but not this year:

---

LYBUNT group

Search>Advanced Search

Custom Fields

Summary Fields

Total Lifetime Contributions	<input type="text"/>	To	<input type="text"/>
From			
Total Contributions this Year	<input type="text"/>	To	<input type="text" value="1"/>
From			
Total Contributions last Year	<input type="text" value="1"/>	To	<input type="text"/>
From			
Amount of last contribution	<input type="text"/>	To	<input type="text"/>
From			
Date of Last Contribution -	<input type="text"/>	(clear)	To <input type="text"/>
From			(clear)
Date of First Contribution -	<input type="text"/>	(clear)	To <input type="text"/>
From			(clear)
Largest Contribution From	<input type="text"/>	To	<input type="text"/>
Count of Contributions From	<input type="text"/>	To	<input type="text"/>
Average Annual (Calendar Year) Contribution From	<input type="text"/>	To	<input type="text"/>
Date of Last Membership Payment -	<input type="text"/>	(clear)	To <input type="text"/>
From			(clear)
Amount of Last Membership Payment From	<input type="text"/>	To	<input type="text"/>
Name of the last attended event From	<input type="text"/>	To	<input type="text"/>
Date of the last attended event -	<input type="text"/>	(clear)	To <input type="text"/>
From			(clear)

## Lapsed donors to recover:

---

FR SYBUNT Group

Search>Advanced Search

Custom Fields

▼ Summary Fields

Total Lifetime Contributions  To

From

Total Contributions this Year  To

From

Total Contributions last Year  To

From

Amount of last contribution  To

From

Date of Last Contribution -   (clear) To   (clear)

From

Date of First Contribution -   (clear) To   (clear)

From

Largest Contribution From  To

Count of Contributions From  To

Average Annual (Calendar Year) Contribution From  To

Date of Last Membership Payment -   (clear) To   (clear)

From

Amount of Last Membership Payment From  To

Name of the last attended event From  To

Date of the last attended event -   (clear) To   (clear)

From

## To find who responded to a specific appeal method:

**Contributions**

Contribution Dates  
- any -

Contribution Amounts  
From:  To:

Payment Method  
- any -

Thank-you sent?  Yes  No (clear)

Receipt sent?  Yes  No (clear)

Contribution is a Test?  Yes  No (clear)

Financial Type  
- any -

In Honor Of

Personal Campaign Page  
- any -

Currency  
- any -

Campaigns  
- select -

Contribution Status  
 Completed  Pending  Cancelled  Failed  Refunded

Transaction ID

Contribution is Pay Later?  Yes  No (clear)

Contribution is Recurring?  Yes  No (clear)

Contribution Page  
- any -

Contribution Source

Personal Campaign Page Honor Roll?  Yes  No (clear)

**Contributions**

**Donor Responded To**  Direct Mail  Phone Call  E-mail  Personal Visit  Personal Letter  Unknown  Check to match ANY; uncheck to match ALL

## This year's donors who could be asked again:

---

### FR Donors this year

Search>Advanced Search

Custom Fields

Summary Fields

Total Lifetime Contributions	<input type="text"/>	To	<input type="text"/>		
From					
Total Contributions this Year	<input type="text" value="1"/>	To	<input type="text"/>		
From					
Total Contributions last Year	<input type="text"/>	To	<input type="text"/>		
From					
Amount of last contribution	<input type="text"/>	To	<input type="text"/>		
From					
Date of Last Contribution -	<input type="text"/>	(clear)	To	<input type="text"/>	(clear)
From					
Date of First Contribution -	<input type="text"/>	(clear)	To	<input type="text"/>	(clear)
From					
Largest Contribution From	<input type="text"/>	To	<input type="text"/>		
Count of Contributions From	<input type="text"/>	To	<input type="text"/>		
Average Annual (Calendar Year) Contribution From	<input type="text"/>	To	<input type="text"/>		
Date of Last Membership Payment -	<input type="text"/>	(clear)	To	<input type="text"/>	(clear)
From					
Amount of Last Membership Payment From	<input type="text"/>	To	<input type="text"/>		
Name of the last attended event From	<input type="text"/>	To	<input type="text"/>		
Date of the last attended event -	<input type="text"/>	(clear)	To	<input type="text"/>	(clear)
From					

## Loyal Donors: Donors who have given 2+ (or more) consecutive years

---

### Smart Groups: Donors Prior Years

Search>Advanced Search

Contributions Tab

**Contributions**

Contribution Dates

Contribution Amounts  
 From  To

Payment Method

Thank-you sent?  Yes  No (clear)

Receipt sent?  Yes  No (clear)

Contribution is a Test?  Yes  No (clear)

Financial Type

In Honor Of

Personal Campaign Page

Currency

Campaigns

Contribution Status  
 Completed  Pending  Cancelled  Failed  Refunded

Transaction ID

Contribution is Pay Later?  Yes  No (clear)

Contribution is Recurring?  Yes  No (clear)

Contribution Page

Contribution Source

Personal Campaign Page Honor Roll?  Yes  No (clear)

**Search>Search Builder**

**Search Builder**

▼ Search Criteria ?

**Include contacts where**

Contacts  IN

Contacts  IN

» Another search field

» Also include contact structure

## SYBUNT

This report searches through ALL donors' donations and finds donors who have given at one point, but not in the year specified. The report does not include contacts who have never donated. Typically, one picks the current year to find donors who have not given the current year. Since the report includes ALL donations, organizations with many years' of donation history may want to make a group of donors covering the prior five years, for example, and then use that group as a filter. Therefore the results will show who has donated at some point in the last five years, but not in the year in question.

To run this report, enter the year for which you are trying to find folks who have not donated in the "This Year" field. Select whether you are using calendar year or fiscal year. This report uses the fiscal year cutoff as defined in the date settings here:

<https://SITE.ourpowerbase.net/civcrm/admin/setting/date?reset=1> where SITE is the name of the PowerBase site.

Select the Contribution Types to be considered. If none are selected, all are included.

Select Contribution Statuses to be included. In almost all cases, the default of "Completed" is the best selection.

Select a Group, if desired. If none are selected, all contacts are included. In addition to the example above, other possible reasons for using a group would be to select only individuals or only organizations.

Select a Tag, if desired. If none are selected, all contacts are included.

The screenshot displays the 'SYBUNT Report - Template' interface. It features a 'Report Criteria' section with the following settings:

- Display Columns:** Donor Name (selected), Contact ID (unchecked), Email (checked), Phone No (checked).
- Set Filters:**
  - Donor Name: Contains (dropdown), [ ]
  - This Year: Is Calendar Year (dropdown), 2013 (dropdown)
  - Contribution Type: Is one of (dropdown), C3C CCI Grant, C3G CCI Gift, C3M CCI Membership, C4C Action Fund Grant (list)
  - Contribution Status: Is one of (dropdown), Completed (selected), Pending, Cancelled, Failed (list)
  - Group: Is one of (dropdown), \_2013 EPA meeting attendees mbrs Ki, \_2-12 c3 membershipskc, \_2.12.13 Budget petition signers Prosp, \_2.26.13 members mailing list (list)
  - Tag: Is one of (dropdown), Unconfirmed (list)

A 'Preview Report' button is located at the bottom left of the interface.

The results displayed will show a row with each donor and columns for the prior three periods and a total for the periods before that, and a life time total donation.

You can also display the annual totals as results in a bar chart or a pie chart. It does not show the individuals.

While you can export the list of contacts, at this time you cannot add them to a group for use in future fundraising.

In CiviCRM, Thank You letters are produced as pdf files that can be printed and mailed to your donor. The process is that you select a set of contributions that have not had the thank you date updated, select a template, create the pdf letter and update the thank you letter date so that they are not printed again. You can also print mailing labels using the same process.

## Setup

Before printing thank you letters, you'll want to set up a message template with your default settings. While you can create Thank You Letters on the fly, this approach will standardized your work and save you time in the long run. A properly configured template can be reused with little editing. In PowerBase, we provide a sample thank you letter format called **Powerbase Thank You Letter Template v1**. It's meant to be a sample layout showing the relevant tokens used in a Thank You Letter. These tokens are only displayed in the token list when you are in the process of sending a thank you letter, which we describe next. Using the provided template, you can make your own template in advance of the first time you create thank you letters.

Templates can be accessed at **Mailings>Message Templates**. They are configured using the html editor that is used for all online pages and emails in PowerBase, the only difference being that they will be printed and not sent as email or displayed in a web browser. They work in conjunction with the default pdf letter size that is set by default. You can override the default size by creating your own Print Page(PDF) format from the option on the System Configuration menu available by going to **Administer>Administration Console**.

There are special tokens for Thank You Letters that are only populated when you run the Thank You Letter process. They are:

- {contribution.receive\_date}
- {contribution.total\_amount}
- {contribution.net\_amount}
- {contribution.contribution\_source}
- {contribution.campaign}

The PowerBase Support team is available to help with setting up your basic pages if you need it.

## Printing Thank You Letters

To print Thank You Letters, go to **Contributions>Find Contributions** and bring up a list of contributions for which you'd like to send a thank you letter. One approach: select all the ones that where "Thank-you sent" is "No". If you have a lot of old ones out there, you can limit the search by date.

Select All Records, and take the action of "Thank-yous for Contributions".

Select the template that you created for Thank You Letters.

Add the date in the body of the mail.

Click Make Thank-you Letters.

We recommend that you NOT select the “Update thank-you dates for these contributions” until you have run the thank you letters enough to know that you are comfortable with how they look at print.

When the pdf file is created, open it in Acrobat. Select print. Select the option to print the document actual size.

Receipts are email messages that are delivered as a result of a financial transaction in CiviCRM. If someone donates via an online contribution page or pays an event fee by registering online and if you have set the page up to do so, a receipt will be automatically sent. If you record a contribution or other payment in “offline” mode, you have the option of sending an email receipt. Thank you letters are done separately from receipts and are not covered in this document. Note that sometimes your payment processor (authorize.net does this) will also automatically send a receipt for credit card transactions. In many cases, you can turn that off on the control panel of your payment processor.

## Receipt Sources:

There are multiple sources of receipts in CiviCRM.

- Each Contribution Page has a custom “Receipt Message” section that appears before the system wide receipt text.
- Each Online Event Registration Page has a custom “Confirmation Email” receipt Text section that appears before the system wide receipt text.
- “Offline” or manually entered contributions have an option to send a receipt
- Recurring contributions have a separate set of receipts

In addition, your payment processor will often have an option of sending its own receipt from outside of your CiviCRM installation.

## Modifying Receipts

You can edit the text that’s in the receipts in two ways:

1. If you are on an Internet facing contribution page’s “Thank-you and Receipting” tab or an event page’s “Online Registration” tab, it’s an option in the page set up. Note that this text can be html but that CiviCRM does not give you the full html editor for that input box. If you aren’t comfortable editing html directly, one trick is to use another window to edit the text using the full editor and then copying the source html into the text box. Receipts on these pages will only apply to financial transactions issued from these pages. Note that what’s edited here will be added to the default receipt template.
2. The default text for receipts can be edited from a menu option on the Mailings Menu. Go to Mailings>Message Templates. Once there, click on “System Workflow Messages” to get to a list of all the text included in the receipts. You can also get to these receipt templates from Administer>Communications>Message Templates These system templates use the PHP language to generate the text via Smarty templates ([www.smarty.net](http://www.smarty.net)). You can add html as well. Note that these templates apply to ALL transactions coming from your PowerBase. So, for example, if you are hosting payments for a C4 and a C3 organization, they will both receive the text on these receipts.

Editing receipts can be complicated to modify, so feel free to reach out PowerBase Support with questions.

# Personal Campaign Pages

CiviCRM's features include allowing your constituents to create their own fundraising pages - and then ask others to fund their cause. These pages are called Personal Campaign Pages or "PCPs".

A personal campaign page allows your constituents to personalize the fundraiser, event, organization, etc., by offering their personal reasons and/or experiences with the organization on their own personal page. Also, your contributors may in turn send the personal campaign pages to their circle of friends. You can enable the "tell a friend" feature to help someone share their page even more.

Examples of this feature in action are typically called "Sponsor My 5k Walk", "Help Fund Our Trip" or "Let's Raise Money to Build A School".

## Administrator Features

Administrators managing fundraising pages may use the following features via the contribution page configuration:

- Requiring approval before a newly-created fundraising page becomes active
- Turning on or off 'tell a friend' so fundraisers can email others
- Setting a notification email when a new page is created
- Choosing a profile of fields to collect from PCP supporters
- Customizing the text in the create button

Once PCP pages are active, administrators can:

- Disable or deny Personal Contribution Pages
- Edit PCP content
- View the amount of money collected by each PCP
- Run reports (using CiviReport) showing a summary of PCP fundraising
- Enter 'offline' contributions (i.e. checks) and credit the money to a PCP

## Fundraiser Features

Those creating their PCPs enjoy the following ways to personalize their page:

- A title of their choice
- Descriptive text
- Selecting a monetary goal amount they hope to raise
- A single image they can upload that will appear on their page
- Choosing whether or not an 'honor roll' of supporter names will be shown on their page
- Option to display a 'thermometer' showing progress towards their goal
- Create a username (or login using a username they already have) so they can edit their PCP later

## Limitations

- CiviCRM's PCP functionality doesn't allow for team management. For instance, a fundraising leader recruiting members to a team, managing membership and then keeping track of which member brought in how much money is not supported by CiviCRM at this time.
- There is a limit of a single image uploaded to a PCP by the fundraiser. The image is not automatically re-sized.
- The thermometer and honor roll appearance can be modified, but changes are applied to all pages. These customizations cannot be done without the expertise of a coder.

# Set-up

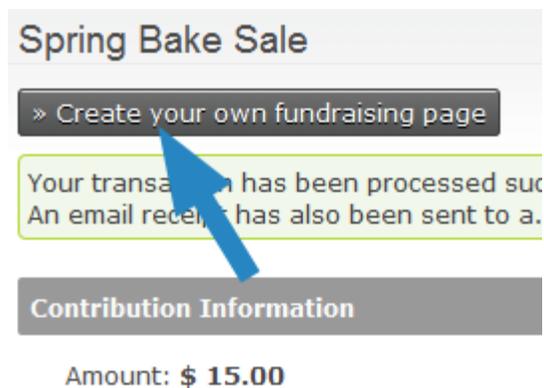
All Personal Campaign Pages *must* be linked to an existing online contribution page or event, created in CiviCRM by navigating to either: **Contributions** > **New Contribution Page** or **Events** > New Event. Once a contribution page or event has been generated, while editing the settings go to the **Personal Campaigns** tab and click 'enable personal campaign pages'. A number of other options may then be configured, including:

- **Approval Required:** check this option to moderate all PCP creation requests. An administrator must approve the page before it becomes active, at which point the user will be notified via email, and may proceed to promote it (ensure "notify email" is also used to notify an administrator when PCP pages are awaiting review).
- **Notify Email:** a receipt for each new PCP will be sent to the named administrators (separate multiple email addresses with commas).
- **Supporter Profile:** select a profile of fields to be collected from the user creating the PCP.
- **Allow 'tell a friend' functionality:** the PCP owner may send emails to their contacts, persuading them to visit their page and contribute.
- **Campaign Type:** when enabling PCPs for an event, you may give the event registrant the option to either create a fundraising event of their own, or a contribution page (e.g. to raise money in support of their attendance).

After PCP creation has been enabled, there are two ways to create a PCP:

- An individual donating to a contribution page or registering for an event are given the option to build their own PCP via a button on the 'thank you' page.
- If the individual forgets to click the link upon donation, or you wish to give all visitors the opportunity to create a PCP without the prerequisite of donating or registering themselves, you can give your constituents a direct link. This link could be emailed to the constituent, embedded in a page or added as a menu item. Note that

## The invitation button:



## The invitation link:

[http://YOUR-SITE.ORG/civicrm/contribute/campaign?action=add&reset=1&pageId=CONTRIBUTION\\_OR\\_EVENT\\_ID&component=EVENT\\_OR\\_CONTRIBUTE](http://YOUR-SITE.ORG/civicrm/contribute/campaign?action=add&reset=1&pageId=CONTRIBUTION_OR_EVENT_ID&component=EVENT_OR_CONTRIBUTE)

To use this link, replace the following:

- **YOUR-SITE.ORG:** enter your domain's address
- **CONTRIBUTION\_OR\_EVENT\_ID:** give the ID number of the event or contribution page. This can be obtained through navigating to 'Manage Events' or 'Manage Contribution Pages' and looking for the ID

against the item in question.

- *EVENT\_OR\_CONTRIBUTE*: If the invitation is for a Personal Campaign Page in support of a contribution page, use *component=contribute*. If the invitation is in support of an event, use *component=event*.

## Managing Personal Campaign Pages

When an individual has clicked the 'create your own fundraising page' button or a direct link, they will be presented with a form to fill out their information, including: a title, message, monetary goal amount and text for the donate button. They may also attach a photo, enable a progress - thermometer style - bar, include an honor role of their donors who have not elected to be anonymous, and whether the campaign is active (they may choose to activate it at a later time).

If PCP moderation has been enabled (the 'approval required' option), an administrator must log into the CiviCRM back-end and enable the page at **Contributions > Personal Campaign Pages** before the individual is able to use it. Simply seek the PCP in the list, look toward the end of the row and click 'Approve', 'Reject' or 'Delete' (at a later date, you may also enable/disable the PCP by clicking the 'More' link). The individual will be sent a confirmation email, and may proceed to use it. Ensure administrators are always alerted to this step by entering a notification email address in the contribution page settings (see 'Set-up' above).

Finally, following approval the PCP owner will be sent an email outlining how they may begin promoting their page and editing it, providing they have been given user access. The user and administrator can edit the PCP settings at any time through the menu item: **Contributions > Personal Campaign Pages > click 'Edit', 'Delete' or 'Disable/Enable'**.

## Introduction

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Phone Banks are set up and operated via the Survey section of the Campaign menu of PowerBase.

The basic work flow of Phone Bank is this:

- 1. Configuration**
  - a. Determine if this will be collecting Donation or Membership payments and configure the button.
  - b. Determine which fields should appear in the pop up when you mouse over a record in the survey
- 2. Set up the Survey type of Phone Bank**
  - a. Add questions as custom data or reuse prior custom fields
  - b. Put them on a profile or reuse a prior profile.
  - c. Add them to the Phone Bank Survey
  - d. Determine a “Result Set” and add it to the Phone Bank Survey
- 3. Create Group(s) to be interviewed**
- 4. Prepare for volunteers**
  - a. Add survey to a menu
  - b. Create volunteer logs in and assign them to a special permission group of PowerBase Phone Bank
  - c. Train the volunteers and staff that will be calling
- 5. Start Calling**
  - a. Using your new Survey, reserve contacts from the Group for each caller
  - b. Caller logs in, makes calls and enters responses, including credit card payments
  - c. Automatically release any reserved contacts after a day so they can be assigned again tomorrow.
- 6. Monitoring**
  - a. Use Activity and/or Survey reports to track who has not been called.
  - b. Use Contribution Reports to check on receipts
- 7. Evaluating**
  - a. Contribution Reports for dollars
  - b. Membership Reports for member renewals
  - c. Activity and Survey reports for number of calls made

## Introduction

---

Phone Banks are set up and operated via the Survey section of the Campaign menu of PowerBase. Survey is a general term used in PowerBase for the module that handles creating questions and collecting answers from a population. Surveys are used for a variety of purposes, such as collecting opinions, fundraising, and they even can be used for getting commitments to attend one or more upcoming events. Survey is not designed to serve as an online survey form. For that, one would use a custom profile or even a petition.

Survey permits you to allocate (reserve) contacts to individuals who will then call or visit the contact, interact with them, and record a result. If you are recording results online, you can directly link to a page to record a contribution or membership renewal for the contact. You can update information, such as phone numbers, directly in the contact record as well as record answers to the survey. Once a contact is reached and a result recorded, the contact will not be included in a call list for that survey again. You can automatically remove the reservations of uncalled contacts on a daily basis so that the next night's volunteers can try to reach that contact again.

While this document will focus on phone banks, the same approach can be used for walk lists and other types of surveys.

## Setup Configuration

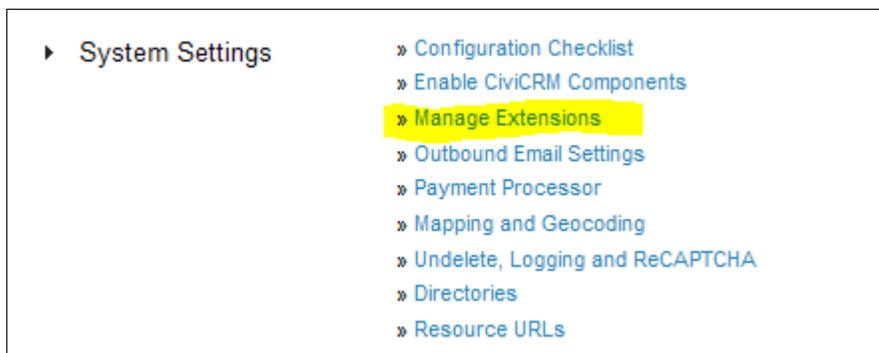
---

### Membership or Contribution links

Phone bank can be set up so that each row in the survey has a link to the contact's contribution or membership renewal page. Clicking on it opens a tab to the correct page for the contact. This speeds up recording payments while the contact is on the phone with the caller.

### One time setup

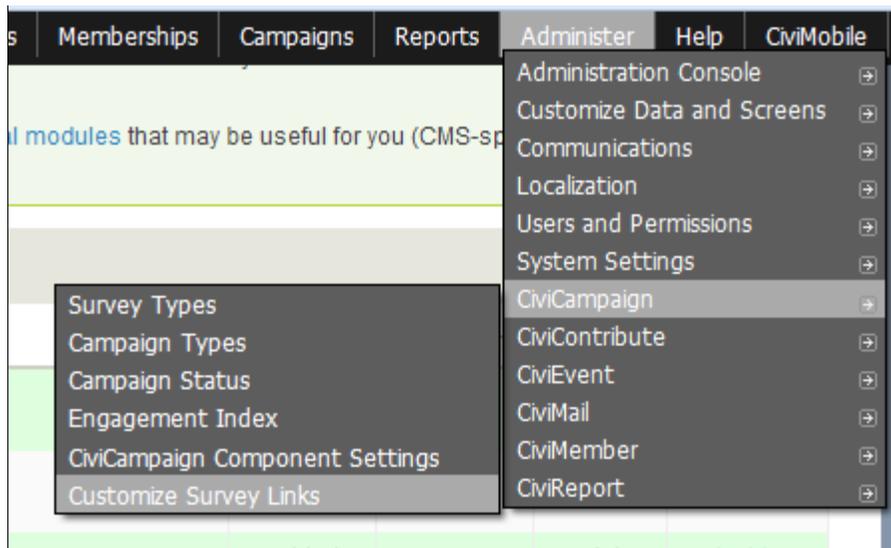
Before using this function the first time, a PowerBase Administrator has to install the extension. To do so, go to **Administer>Administration Console**. In the System Settings section, **Select Manage Extensions**.



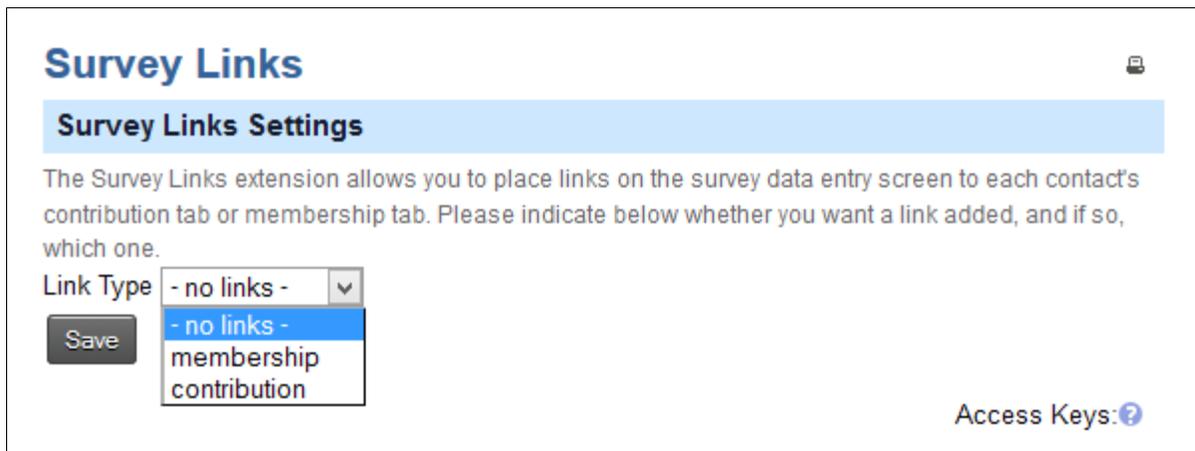
Select **Install** on the **Survey Links** row.

<p>► <b>Survey Links</b> (net.ourpowerbase.surveylinks)</p>	0.1	Module	Install
---	-----	--------	---------

Once this is completed, the links can be turned on or off as needed. That is done via the **Administer>CiviCampaign>Customize Survey Links** option.



You can set the link type that you want here. Select whether the link will be to the membership or contribution contact page. Note: Once you select a link, it will appear on ALL surveys, until you set it back to - no links -



### Summary Overlay

There is a handy feature called the Summary Overlay that is helpful for working with phone banks.

- It's a pop up screen that appears when you mouse over the person icon on the phone bank list.
- It also works on the Search Results lists.

## Advanced Search

▶ Edit Search Criteria ?

277	Beatrice Ameduri							
Select	Constituent Type	Potential Member			Donor Current Level			
	Phone (Primary)	330-555-3766			Donor Solicit?			
	Home Phone	330-555-3766			Donor Category			
	Home Mobile				Donor Allegiance			
<b>A</b>	Home Address	950 Cornell St			Last Contribution	25.00		
Reset	City	Youngstown			Date of Last Contribution	January 1, 2013		
<input type="checkbox"/>	State	OH			Total Contributions	50.00		
<input type="checkbox"/>	Zip	44502			Total Contributions this Year	25.00		
<input type="checkbox"/>	Primary Email	abc2533@example.com			Total Contributions last Year	0.00		
<input type="checkbox"/>	Best time to Contact				Date of the last attended event			
<input type="checkbox"/>	Issues Interest				Last attended event			
<input type="checkbox"/>	Donor Ask Level							
<input type="checkbox"/>	Ameduri, Beatrice	950 Cornell St	Youngstown	OH	44502	330-555-3766	Potential Member	
<input type="checkbox"/>	Amoline, Danielle	9067 N Girdle Rd	Middlefield	OH	44062	999-150-2013	Constituent	

The benefit of this is that the person calling does not need to go to another screen to get detailed information on contact. You can see that there is a lot of space here for putting in information you will need as the call progresses. We've edited this example to put in items that are not in the default version.

You can edit the field list that go on this page by going to **Administer>Customize Data and Screens>Profiles**. Select the **Reserved Profiles** tab. Select Fields on the Summary Overlay row.

				Directory	
Summary Overlay	Individual, Contact	7	Standalone Form or Directory	<b>Fields</b>	Preview more ▶

You can add or subtract fields from here. It's okay to delete or disable them. Adding or subtracting fields from a profile to not change the underlying data, i.e. they are non-destructive.

## Setup the Phone Bank Survey

Here's what a phone bank looks like when someone is calling through their list.

The screenshot displays the 'Record PhoneBank Responses' interface. At the top, there are instructions: 'Call members to ask for additional donations at the year end.', 'Click record response button to update values for each respondent as needed.', 'Click Release Respondents button below to release any respondents for whom you have recorded a response.', and 'Click Review More Respondents button if you need to get more respondents to interview.' Below these instructions are filters for 'Columns' and 'Order' (set to 'Ascending'). A 'Show' dropdown is set to '10' and 'entries'. A search bar is located on the right. The main table has columns: Name, Home Phone, Donor Age Level, Gender, Preferred Language, Next Steps, Note, and Result. Each row represents a contact, with a 'Record Response by AI' button on the right. The contacts listed are: Adams, James; Adams, America; Adams, Helen; and Adams, Jacqueline.

The first column is the icon. Hovering over it with the mouse will bring up the summary overlay. Next is a column with the name which is automatically added to the profile, and below it is the link to record a contribution page for the contact. This is automatically created if the Survey Link has been defined. To the right of the name are fields that come from the contact record and were placed there by the survey creator. Note that some of them are editable so the data in PowerBase can be changed on the fly. The right hand section after the Preferred Language column contains the fields that are the actual “questions”, that is, the information that we are specifically seeking from the contact via this survey. These answers will be recorded in an activity record of the type PhoneBank.

Questions are not required for a survey. Sometimes the remaining columns collect all the information you are interested in.

The last three columns: **Notes**, **Results** and **Record Response** are automatically created by the survey record. The caller calls the phone number of the contact and holds a conversation or gets voice mail. The next steps field is recorded. The Result is marked as Completed and the caller clicks **Record Response**.

To create a phone bank survey like this, go to **Campaigns>New Survey**. You'll get the screen below.



Click **Continue**.

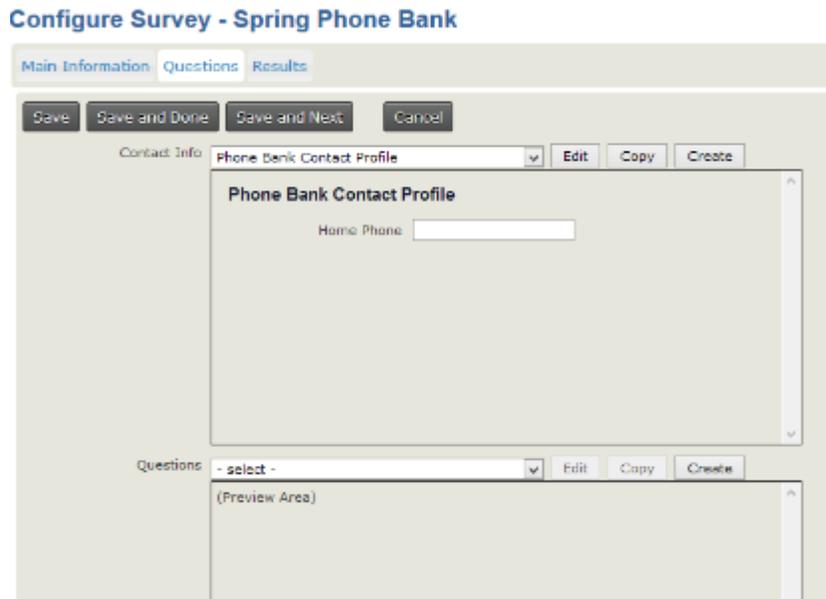
### ***The Questions Tab***

The blank Configure Survey Questions Tab appears with places for two profiles.

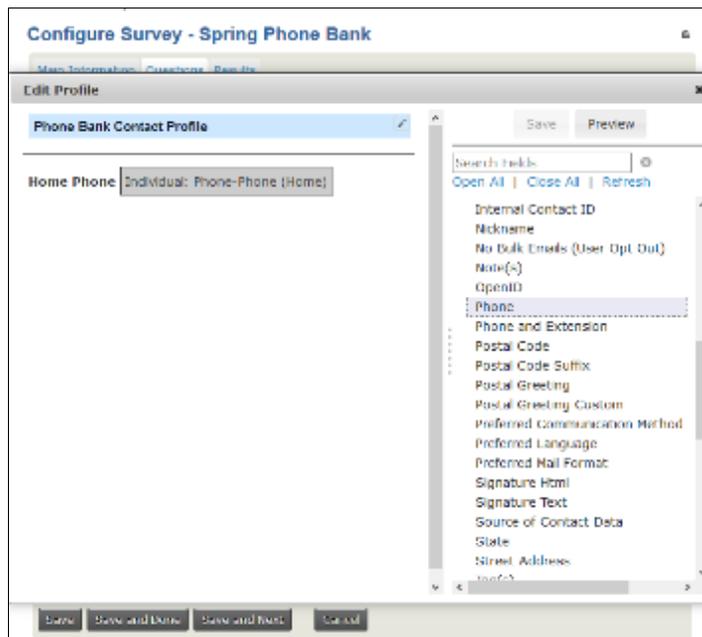
The idea for this page is that you will put the profile that holds the contact fields in the upper section. Select an existing profile in the field next to **Contact Info** to **Edit** or **Copy** or click **Create** to make a new one.

## The Contact Info Profile

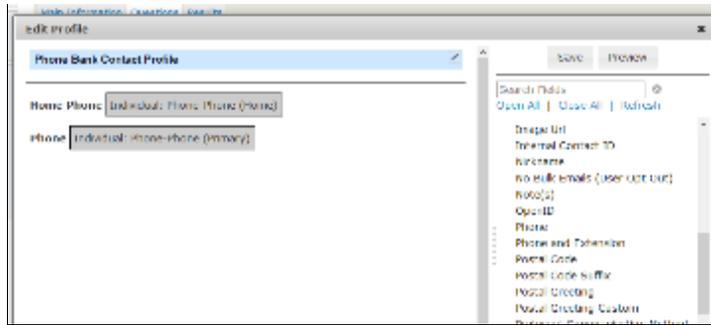
We've select the **Phone Bank Contact Profile** that was created earlier.



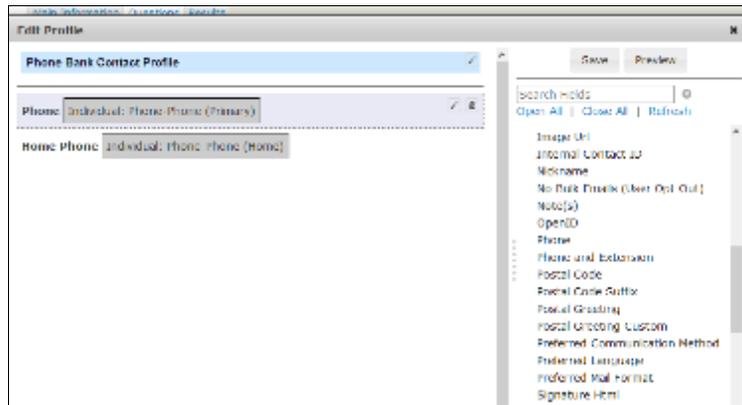
We'd like to edit this profile to have more information and phone numbers. The contact name will appear by default so you needn't add that. We click **edit** to go the profile edit screen. This opens up a window over the survey. In the left window we have the fields currently in the profile. In the right hand window the potential additional fields appear. If we click on the plus sign by **Individual**, we get a list that looks like this screen:



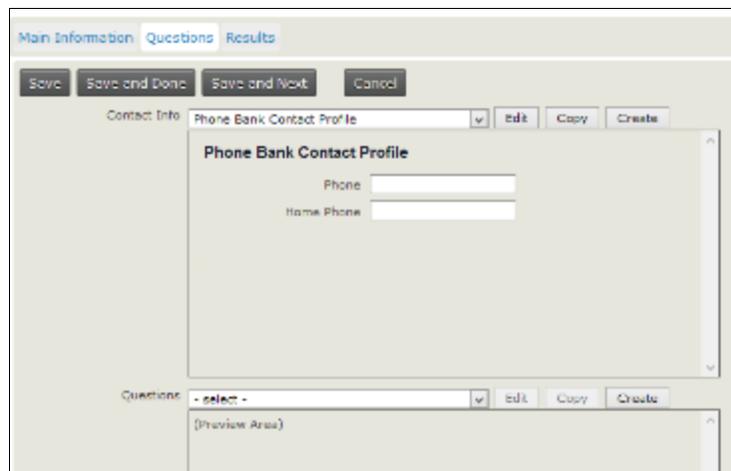
Find phone number on the list and drag it over to the left window. It defaults to the Primary Phone, which is okay, but we'd like it to be first on the list. Just click on it and drag it up.



We see that Primary Phone has moved into place. Clicking on the field also displays the pencil icon – which allows us to edit the field and the label – and the trash can which allows us to remove it from the profile.

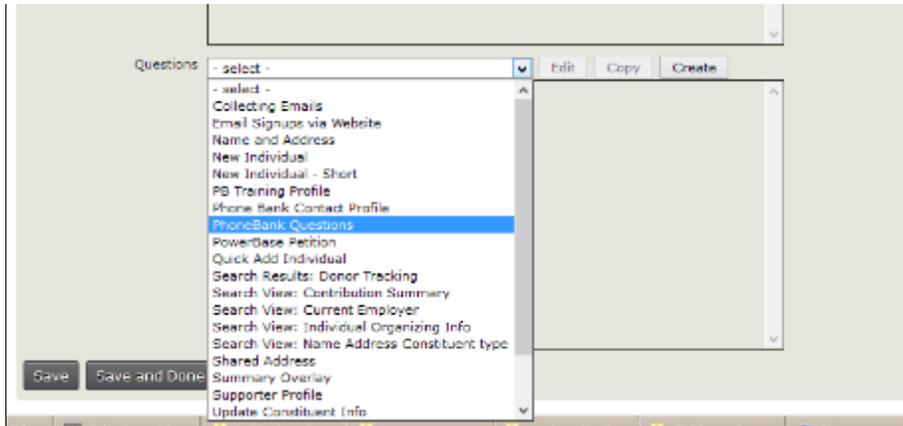


When we're done editing, click on the **Save** button in the upper right corner of the overlay window. We're returned to the original Questions tab, but now our upper window's profile has been changed to add the field.

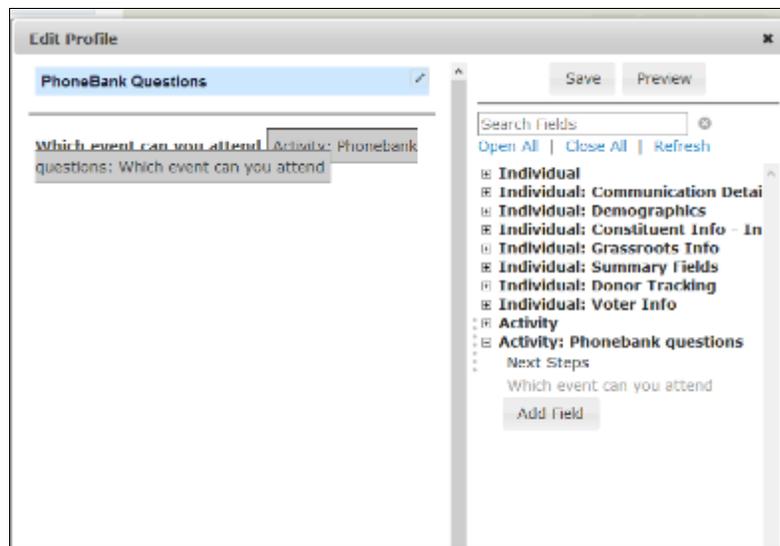


## The Questions Profile

In this section you can also edit or copy an existing profile or create a new one. In this example, we going to use an existing one called *PhoneBank Questions*.

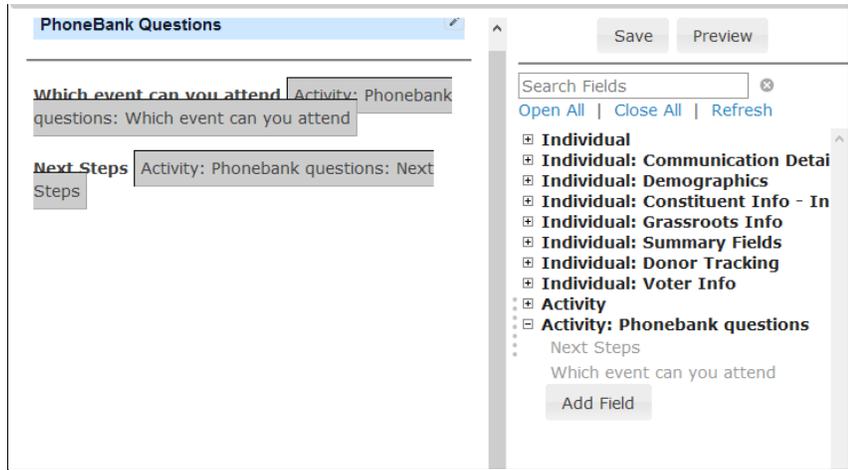


We have a situation similar to what we had before: two windows, profile on the left, fields to select from on the right.

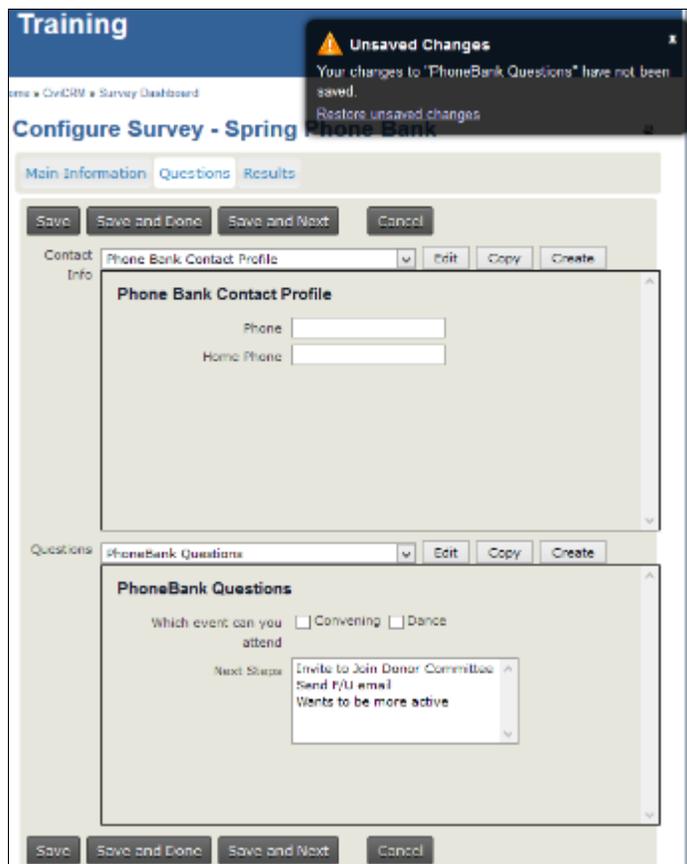


Since these are the questions and questions are stored as a special activity type of PhoneBank, expand the **Activity: Phonebank questions** to get a list of possible fields. If we don't see the one we want, new fields can be added right on this screen. This process has the same result as adding them through the Customize Data and Screens>Custom Fields option on the Administer menu. The new fields created here will be new custom fields in your PowerBase. It's not a good idea to add new fields without discussing it with your colleagues or without checking to make sure they are not already in the PowerBase somewhere else.

We've got a field that's called *Next Steps* that we want to add to the survey. It is a field designed to capture the intermediate term actions someone should take with this contact after the survey is completed. Drag it over and it becomes part of the PhoneBank Questions profile.



Click Save in the upper right hand corner of the window overlay to close it and continue from the Questions tab.



PowerBase reminds us to save our work, we are done with the profiles anyway, so we click **Save and Next**.

## Results Tab

**Configure Survey - Spring Phone Bank**

Main Information Questions **Results**

Home Home and Done **Export and Next** Cancel

Survey Responses \*  Create a new result set  
 Use existing result set  
 You can create new result options for this survey, or select an existing survey result set which you've already created for another survey.

Select Result Set:

**Result Options**

Enter up to ten (10) multiple choice options in this table (click 'another choice' for each additional choice). You can use existing result set options by selecting survey result set.

Default	Label	Value	Recontact Interval	Weight
<input type="radio"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="radio"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

[▶ another choice](#)

**Create Report**

Create Report

Report Title

Save Save and Done Save and Next Cancel

The Results tab holds all the values for the Results field. Every survey has a results tab. It has several functions:

- It can close the phone bank for this contact and mark it complete so that they will not get called again.
- As it closes the survey for this contact, it can track statuses of the survey that can be used for follow up actions
- It can release the contact from the phone bank and allow another person to call again later.

Begin by selecting existing an existing Result set and modifying it for your needs.

**Configure Survey - Spring Phone Bank**

Main Information Questions **Results**

Save Save and Done Save and Next Cancel

Survey Responses \*  Create a new result set  
 Use existing result set  
 You can create new result options for this survey, or select an existing survey result set which you've already created for another survey.

Select Result Set:

**Result Options**

Enter up to ten (10) multiple choice options in this table (click 'another choice' for each additional choice). You can use existing result set options by selecting survey result set.

Default	Label	Value	Recontact Interval	Weight
<input type="radio"/>	Completed	C		1
<input type="radio"/>	Not Home	NH		2
<input type="radio"/>	Moved	MV		3
<input type="radio"/>	Wrong Address	WA		4
<input type="radio"/>	Wrong Number	WN		5
<input type="radio"/>	Deceased	DE		6
<input type="radio"/>				

[▶ another choice](#)

The **Recontact Interval** is the number of days to wait before this contact can be contacted for this survey. If it's set to blank or zero, the contact is taken out of the survey pool once the result is recorded. In some cases, that may not be the desired result. Take "Not Home" for example. If the desire is to call the "Not Home" folks back, then setting a number of 1 will make them available to be called the next day. Setting it to 7 will delay it for a week. They will not be taken out of the pool.

**Weight** controls what order they appear in on the list.

You are not restricted to these results. Imagine a phone bank that was designed to simply find out if the contact was supporting a specific position of the organization. The result set could be Yes or No or Declined to Say. It's good to include the other more general options as well. Phone calls are a good time to clean up the database so using the opportunity to record who moved, bad phone numbers and deceased are perennial result options. The organizer of the phone bank can query the survey results and pull up a list by these statuses or any of the other questions fields.

**Create Report** option defaults to yes. A report will be created for this survey with the name of the survey. You can override the name by filling in the **Report Title** field.

**Clicking Save and Next** will bring you back to the original Main Information tab. **Click Save and Done** to end the survey editing.

## Reserving Respondents

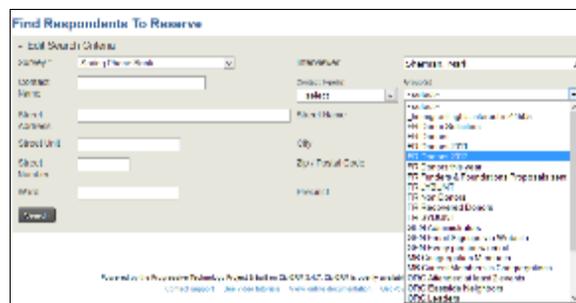
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Reserving respondents assigns contacts to an interviewer. When the interviewer logs in to start calling, this is the list of contact that will appear. Respondents will stay reserved until the interviewer calls them or they are manually or automatically released.

Assuming that you've prepared a group of contacts that you are targeting for the phone bank, and that you know who is going to do the calling, the best practice is to reserve them for each caller before the interviewer is waiting to get started.

Pay attention to the release frequency that you've set for this phone bank. If you've set a release frequency of a day, and you reserve them for a phone bank tomorrow, they'll all be released before you get started. To get around that, set the release frequency to a longer period of time so that you have time to get ready for your callers or just reserve them the same day they call.

Go to **Campaigns>Reserve Respondents**.



Pick the **survey** that you want.

Pick the **interviewer**. The default will be for yourself unless you change it. The interviewer has to be someone in your PowerBase. It also should be someone who has a login into your PowerBase.

Pick the **group** that in which you want to reserve. Press **Search** which brings you to the search results list.

<input checked="" type="checkbox"/>	Contact Name	Street Number	Street Name	Street Address	City	Postal Code	State	Country	Email
<input checked="" type="checkbox"/>	Adams, Charles	610	Griffith St	610 Griffith St Apt 162	Youngstown	44510	OH	United States	abc44
<input checked="" type="checkbox"/>	Adams, Mark	3210	Flo Lor Dr	3210 Flo Lor Dr Apt 10	Youngstown	44511	OH	United States	abc55
<input checked="" type="checkbox"/>	Andrei, Helen	3000	Flo Lor Dr	3000 Flo Lor Dr Apt 10	Youngstown	44511	OH	United States	abc54
<input checked="" type="checkbox"/>	Angelo, John	541	Carlotta Dr	541 Carlotta Dr	Youngstown	44504	OH	United States	abc14
<input checked="" type="checkbox"/>	Anthonsen, Marian	3037	Canfield Rd	3037 Canfield Rd Apt 1	Youngstown	44511	OH	United States	abc55
<input checked="" type="checkbox"/>	Armstrong, David	3453	Cascade Dr	3453 Cascade Dr	Youngstown	44511	OH	United States	abc19
<input checked="" type="checkbox"/>	Austgen, Helen	346	S Hazelwood Ave	346 S Hazelwood Ave	Youngstown	44509	OH	United States	abc18

Select the number you want to reserve for this person. The count may be additionally limited by the settings on the survey. Click **Go**.

This brings up the **Reserve Respondents** Screen.

**Reserve Respondents**  
Add Respondent Reservation(s)

Reserve Reserve and Interview Cancel

Do you want to reserve respondents for "Spring Phone Bank" ?

Number of selected contacts: 25

▶ Add respondent(s) to a new group

▼ Add respondent(s) to existing group(s)

- \_Immigrant rights interest in 44505
- FR Donor Solicitors
- FR Donors
- FR Donors 2011
- FR Donors 2012

Reserve Reserve and Interview Cancel

Click **Reserve** if you are reserving for someone else. Click **Reserve and Interview** if you are reserving for yourself and ready to start.

## Conducting the Phone Bank

When the time comes to interview, go to **Campaign>Interview Respondents**.

### Find Respondents To Interview

▼ Edit Search Criteria

Survey * <input type="text" value="Spring Phone Bank"/>	Interviewer <input type="text" value="Sherman, Mark"/>
Contact Name <input type="text"/>	Contact Type(s) <input type="text" value="- select -"/>
Street Address <input type="text"/>	Group(s) <input type="text" value="- select -"/>
Street Unit <input type="text"/>	Street Name <input type="text"/>
Street Number <input type="text"/>	City <input type="text"/>
Ward <input type="text"/>	Zip / Postal Code <input type="text"/>
	Precinct <input type="text"/>

Enter the same **Survey** and **Interviewer** as before and select **Search**.

### Record PhoneBank Responses

We're calling to get folks to come to the Annual Membership Meeting. Please see who is coming to the Saturday meeting and the Dance Saturday Night.

Click **record response** button to update values for each respondent as needed.  
Click **Release Respondents >>** button below to release any respondents for whom you haven't recorded a response.  
Click **Reserve More Respondents >>** button if you need to get more respondents to interview.

Column  Order

▶ another column

Show  entries Search:

Name	Phone	Home Phone	Which event can you attend	Next Steps	Note	Result	
Adams, Charles	330-555-1678	330-555-1678	<input type="checkbox"/> Convening <input type="checkbox"/> Dance	Invite to Join Donor Committee Send F/U email Wants to be more active		- select -	<input type="button" value="record response"/>
Adams, Mark	330-555-1783	330-555-1783	<input type="checkbox"/> Convening <input type="checkbox"/> Dance	Invite to Join Donor Committee Send F/U email Wants to be more active		- select -	<input type="button" value="record response"/>
Andrei,	330-555-1773	330-555-1773	<input type="checkbox"/>	Invite to Join Donor Committee		- select -	<input type="button" value="record response"/>

The result is the list of people to be interviewed. The Interviewer makes the calls, selects appropriate responses including the **Result** and then clicks **record response**. Doing so releases the contact from the reserved set. If the interviewer didn't get a connection, the row can be left and it will remain in the Phone Bank. There is also an option at the bottom of the list to release all the respondents.

## 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/>

## Orientation

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

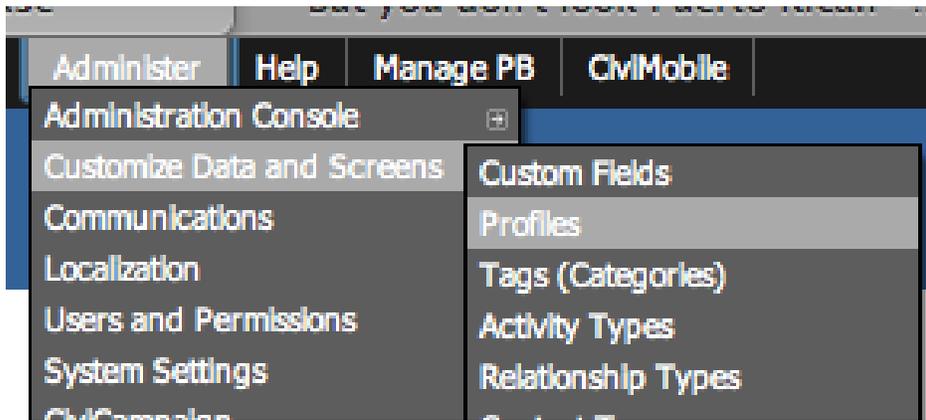


Figure 1 Finding the Profile Menu

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,

**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.

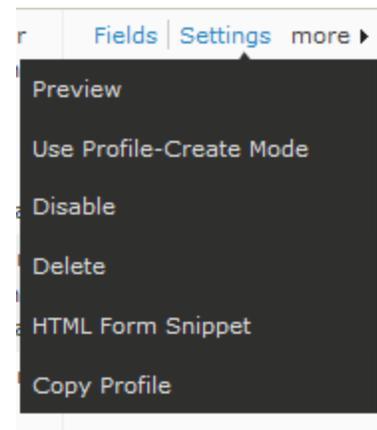


Figure 3 The more menu

## Preparing for a Profile

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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.

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.*

---

# 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 left are 'Save' and 'Cancel' buttons. Below them is a button labeled 'View or Edit Fields for this Profile'. The main form area includes:

- Profile Name \***: A text input field containing 'E-Newsletter Sign-up'.
- Used For**: A group of checkboxes:  Standalone Form or Directory,  Search Views,  ~~Drupal User Registration~~, and  ~~View/Edit Drupal User Account~~.
- Order \***: A text input field containing '11'.
- Pre-form Help**: A rich text editor with a toolbar containing icons for undo, redo, bold, italic, underline, strikethrough, bulleted list, numbered list, link, unlink, image, table, text color, background color, and source. The text area contains the heading 'SIGN UP TO RECEIVE E-ALERTS HERE'. Below the text area is a status bar showing 'body p'.
- Post-form Help**: A second rich text editor with the same toolbar. The text area is currently empty. Below the text area is a status bar showing 'body p'.
- Is this CiviCRM Profile active?**: A checkbox that is checked.
- Advanced Settings**: A link at the bottom left of the page.

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.*

**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:

Advanced Settings

Limit listings to a specific Group? - select - ?

Add new contacts to a Group? E-Newsletter Sign-up ?

Notify when profile form is submitted? ?

Redirect URL http://yourwebsite.org/ ?

Cancel Redirect URL http://yourwebsite.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? ?

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.

**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.

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*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.*

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**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.

## Adding Fields in a Profile

### E-Newsletter Sign Up - CiviCRM Profile Fields

Save Save and New Cancel

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

Field Label ?

Required? ?

View Only? ?

Visibility \* ? User and User Admin Only

Field Pre Help ?

Field Post Help ?

Order \* ? 1

Active? ?

Save Save and New Cancel

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.

Field Name - select -  
- select -  
Contacts  
Individual  
- Media Contact  
- Funder Contact  
- Elected Official  
Household  
Organization  
- Media Outlet  
- PB Hosted Org  
Activity  
Participants  
Contributions  
Membership  
Formatting

Figure 7 Tables available

**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.

## E-Newsletter Sign Up - CiviCRM Profile Fields

### Add Field

Field Name:

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

Field Label:

Required?

View Only?

Visibility \*:

Field Pre Help:

Field Post Help:

Order \*:

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.

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*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...)***

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## 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.

# Managing Grant Proposals and Reporting with PowerBase

## Tracking Foundations, Funders, Grants, Grant Proposals, and Reporting.

### Contact sub types

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#### Foundations

There are special contact types created to track extra fundraising related information for Foundations and for Funders. Both Foundations and Funders have the special designation of being contact subtypes in PowerBase. Within the Organization category, Foundation is a contact subtype that has special fields associated with it. The same goes for Funders, except that it's a contact subtype of Individuals. Contact subtypes allow you to collect different data for a particular Funder or Foundation contact that you might not collect for all Individuals or all Organizations.

The contact subtype Foundation has spaces for tracking funding areas of interest, the average amount that the foundation typically gives out, and notes on the foundation's requirements. You can also use Constituent Type to differentiate further among Foundations, if desired.

#### Funders

Funders are individual subtypes that typically are program officers at foundations, but they can be any type of funder including those that give personally. There are spaces for writing notes as well as marking issue interest. A program officer at a foundation would be listed as employed by the foundation so the Foundation and Funder are linked by a relationship.

### Recording Contributions

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#### Grants

Grants are recorded as contributions in PowerBase. We suggest that you create a contribution type called "Grants" to differentiate from other types of donations.

### Activity Types

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Activities are the way PowerBase tracks both future, e.g. scheduled, actions to be done by staff and they also keep a history of actions done *by* the contact (i.e. made a contribution, attended an event) and *with* the contact by staff (i.e. check-in phone call, prospecting meeting, etc.). Scheduled activities can be shown on the staff member's home page dashboard so that there is a daily reminder of upcoming tasks. While many activity types, such as a meeting or phone call, can be used for managing foundation fundraising, there are some that are specific to fundraising.

# Managing Grant Proposals and Reporting with PowerBase

## **Letter of Inquiry**

The cycle of activities with a foundation is often initiated by sending a letter of inquiry, which, if responded to positively, leads to a meeting of some sort and then to writing a grant proposal. Use the Letter of Inquiry activity to assign the task of writing the Letter of Inquiry to someone on staff and then, when completed, to record that it was sent.

## **Grant Proposals**

There is an activity type called Proposal that is designed to be used for managing the grant proposal workflow. The idea would be to create the scheduled activity with the date due as soon as you learn about the grant application deadline. Associate it with the foundation and the program officer to whom the proposal will be submitted. Assign it to the person(s) responsible for writing the proposal. You can add notes, the amount that you plan to request (if known) and other details. Give it “scheduled” status until the grant proposal is completed, then update the activity to show it as “completed”. The proposal activity type also has a specific proposal status that can be used to record the disposition of the proposal by the foundation. A copy of the proposal and any other correspondence could be attached to the activity.

## **New Grant Report Due**

When a grant is made then it's certain that a grant report will be due. Use this activity type to schedule the Grant Report and assign it to the person responsible. When the report is completed, the status of the activity would be updated to “completed”. A copy of the report could be attached to the activity.

## **Reporting on Foundation Work**

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The reporting function of PowerBase can be used to track the contributions received as well as the scheduled and completed activities. It's outside the scope of this document to describe how to set up a report for the dashboard, other than to point out that using an activity report that shows scheduled activities for foundation work is the best practice for keeping a task list organized and documented for the entire team. See this note on how to add a report, or dashlet, to the dashboard: <http://www.progressivetechnology.org/powerbase/pb-tip-add-a-dashlet-to-your-pb-homepage/>