

## Creating Profiles for Batch Updating Participant Info for Events

PowerBase Training 10/15

Before you create the event you will want to confirm the information in these two fields:

1. Participant Status
2. Event Type

**Participants Status:** allows you to define the status for each of event participant (e.g. Registered, Confirmed, Attended, No Shows, etc)

PATH: **Administer CiviCRM > CiviEvent > Participant Status Options > Edit or Create New Status Options**

**Event Type:** allows you to categorize the kinds of events you want to track in PowerBase

PATH: **Administer CiviCRM > CiviEvent > Event Type Options > Edit or Create New Status Options**

HINT: with both of these pieces make sure you do not delete any options; just disable them if you are not using them.

Now you are ready to create an Event

1. Two places: **CiviEvent > New Event** (button option) or **New Event** (drop down menu) > **Event Information > Event Details** > select the **\*Event Contact Person** if applicable

\*If you want to assign a Staff Person to a particular Event and they are not already in this select list, follow this:

**Administer > Custom Data > Staff Responsible > Edit Multiple Choice Options > add a new staff person to the options list**

Finish creating the Event

2. Next select the people you want to register or sign up:

BASIC PATH: **Find Contacts > use Advanced Search** or other search option to enter your search criteria > select **All Records** or individual records > in “**More Actions**” drop down menu select **Add Contacts to an Event**

When you “**Add Contacts to an Event**” PowerBase will set the status field to “Registered” for each contact

NOTE: You can also use **Manage Groups** link if you have already created a group or a smart group of people you would like to invite to your event

3. Now you are ready to create two Profiles- one for Batch Updating and one for a search view which will display phone numbers of participants you want to call about the Event

- **Create a Batch Update Profile: Administer CiviCRM > Custom Profile > Create a Profile for Participants with the desired participant info (see PowerBase Day 4 cheat sheet)**
- **Create a Search Profile: Administer CiviCRM > Custom Profile > Create a Profile to display Phone Number (or desired Contact field)**

4. Update participants' status and information for event

You will need to search for the participants you want to update. You can search a couple of ways.

- **CiviEvent > “Event Name” > Registered/Confirmed/ Attended > Select All records > Batch Update via Profile (drop down menu) > Go > Test Event Profile**
- **CiviEvent > Find Participants > enter your criteria**

Once you have your search results, you can then batch update each participant's info, using the profile you created.

- From the Search Results > **Select All Records** > from **"More Actions"** drop down menu select **"Batch Update via Profile" > Go > Test Event Profile**

5. In a **2<sup>nd</sup> Tab** within your browser, use the **Search Profile** to view participants' Phone Number

**Find Contact > Advanced Search > Search Views > "Profile Name" > Search**

HINT: Participants and contacts will always be listed in alphabetical order whenever they are searched