
DAY 1 POWERBASE TRAINING CHEAT SHEET

GETTING STARTED ON POWERBASE

When you Login your first screen is **Your Dashboard**. This displays upcoming **Activities and Events**.

One of the most important tasks you have is to learn how to **Administer Drupal and CiviCRM**.

Administer Drupal: Add your Staff and Set Permissions

BASIC PATH: **Dashboard** > Under your username > **Administer** > **User management** > Menu with: **Access Rules, Permissions, Roles, User settings, and Users**

- **Permissions**> allows you to control what users can do on your Drupal site. Focus on the CiviCRM module
- **Roles**> allows you to define a group of people with particular permissions
- **User**> summarizes all of the users' roles once they have been added to the site
- **Add Users**> add all of your staff to the site

Add your Staff Responsible into the Custom Data

BASIC PATH: **Administer CiviCRM: Administer CiviCRM** > **Customize** > **Custom Data** > **Core Info** > **View and Edit Custom Fields** > **Staff Responsible** > **Edit Multiple Choice Options** > select **New Option for Staff Responsible**

Add your staff into PowerBase

- **CiviCRM Shortcuts** > **New Individual** > **fill out all of the information**

Review of Topics from Sept 14th Training

- *Tracking and Assessing Interactions* with your Contacts
- *Activities* can be tracked, assigned to a staff and will be displayed on your Dashboard when you Login to PowerBase
- *Relationships* can be created between Organizations and Contacts.
HINT: Organizational records must be created before you can establish a relationship between a Contact and an Organization
 - *To Administer and Create Relationship Types: Administer CiviCRM* > **Option Lists** > **Relationship Types** > **New Relationship Type**

Track Changes for Contacts: This allows you to view who last changed the record and at what time the record was changed.

BASIC PATH: **Individual Contact record** > **Change Log Tab**

Householding: Best practice for Householding right now, is to not use the Shortcut **New Household**.

- Identify the main individual record in each household to apply a contribution to and then assign soft credit to the other members of the house.