

Advanced Organizing Track

This course teaches advanced organizing strategy using PowerBase.

Starting with developing a strategy for your campaign, through advanced topics such as segmenting your constituents, building on-line forms and importing data, you will end the course with new tips and skills to get the most out of PowerBase.

Enclosed please find the course outline and materials that will be used for the Advanced organizing track. You may either follow along on screen, or if you prefer, you may print this out prior to coming to the training.

Course Outline

1. Scenarios: Break into small groups and plan your organizing strategy for the given scenario.
2. Measuring Engagement and Segmenting: Techniques for searching your database for the most engaged leaders and filtering your contacts to create useful groups.
3. Deduplication and merging: keeping your data clean
4. Political Education
5. Importing: Bring in new contacts easily and quickly via imports.
6. Online data collection: Build public web forms to collect data from new contacts and direct folks from your social networks.

Movement Technology Platform (draft)

Build a healthy environment for technology

1. **Provide everyone with** full, affordable, high-speed, equitable, content-neutral **access to the Internet**
2. Develop an **Internet that is democratic, community-centered and governed, open, decentralized**, and free of corporate pressure and monopolies.

Change the direction of technology development

3. Build a political and technology campaign to oppose, restrain and ultimately **eliminate intrusive** government technology **surveillance**.
4. Fundamentally refocus technology development to repair damage to the environment and **build a world of climate justice**.
5. To seek out, build, and embrace the potential of digital **technologies to protect and advance our movements**.

Deepen the collaboration between technologists and the movement

6. To develop and utilize culturally relevant, intersectional, interpersonal **technology for movement work** that is grounded in political education and historical context.
7. Foster political consciousness about the centrality of technology in movement work, and the **urgency of revolutionary movement based technology**.

Scenario 1: Healthy Food Campaign

You have just received city funding to run a healthy food campaign in Columbus that educates your constituents around the issue and with a requirement to bring at least 1,000 people to a series of public events on the topic. Additionally, your organization has identified 4 zip codes that are considered food "deserts" and you want to take advantage of this opportunity to build leadership in these zip codes to change city policy to enable better access to fresh food in these areas.

Scenario 2: Youth Leadership Environment Justice

Your city has just cut its public school budget by 20%. While other organizations are organizing teachers and parents, your organization has decided to focus on youth. Your goals are to identify youth leaders, develop them politically, and contribute to the bigger campaign to restore the funding. There are four schools you are currently working in - and you have ally teachers and about 5 - 10 students in each school that you are already in contact with.

Scenario 3: Statewide Campaign

You are organizing a statewide living wage campaign. A few years ago you successfully organized for a city-wide living wage and now you and your allies are ready to take the campaign state-wide. You will be working with Faith-based institutions, labor unions, migrant rights organizations and college-based organizations. Your overall goals are to organize state-wide to pass a living wage ordinance at the state level during the next legislative session six months from now. You will be taking hundreds of constituents to the state capital to lobby legislators. You will also hold a massive rally the day before the session starts.

Using Engagement and Event Count Search to Find Contacts: Exercise

Report the number of contacts returned for each search.

1. Find all contacts attending 2 or more events: _____
2. Find all contacts who signed up for one or more events of the type Direct Action: _____
3. Find all contacts with a meeting that was scheduled but not completed.
4. Find all contacts that participated in the "Lead poisoning Abatement" Campaign with an engagement level over 3: _____
5. Find everyone with a life time contribution level over \$1000.
6. Find everyone that has an email address. However, you want to exclude consultants unless they are also allies. How many people are there that fit this criteria? _____

Extra Credit.

Log into your organization's database and run three searches that return useful information for your work. Be prepared to report on what the searches were and what the results were and why it is useful to you.

Fundraisers Cheat Sheet for Creating Donor Smart Groups Page 5 of 49

People with Valid Postal Addresses

GEN Good Postal Addresses Group

Search>Search Builder

The screenshot shows the 'Search Builder' interface in CiviCRM. At the top, there is a breadcrumb trail: 'Home » CiviCRM » Find Contacts'. Below this, the title 'Search Builder' is displayed. Under the 'Search Criteria' section, the instruction 'Include contacts where' is followed by a search criteria builder. It shows a dropdown menu with 'Contacts' selected, followed by 'Postal Code', 'Primary', and 'IS NOT NULL'. There are links for '» Another search field' and '» Also include contacts where'. A 'Search' button is at the bottom left of the criteria section.

People with Valid Email Addresses

GEN Good Email Addresses Group

Search>Advanced Search

The screenshot shows the 'Advanced Search' interface in CiviCRM. At the top, there is a breadcrumb trail: 'Home » CiviCRM » Find Contacts'. Below this, the title 'Advanced Search' is displayed. Under the 'Search Criteria' section, there is a 'Basic Criteria' sub-section. It contains several search fields: 'Complete OR Partial Name', 'Complete OR Partial Email' (with a yellow highlight on the '@' symbol), 'Search Views' (set to 'Name Address Constituent type'), and 'Display Results As' (set to 'Contacts'). There are also dropdowns for 'Contact Type(s)', 'Group(s)', 'Select Tag(s)', 'Phone Number', 'Phone Location', and 'Phone Type'. A 'Search Operator' dropdown is set to 'AND'. A checkbox for 'Search in Trash (deleted contacts)' is present. At the bottom, there are radio buttons for 'Exclude' and 'Include by Privacy Option(s)', and checkboxes for 'Preferred Communication Method' (Phone, Email, Postal Mail, SMS, Fax).

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Donors who gave last year but not this year:

LYBUNT group

Search>Advanced Search

Custom Fields

Summary Fields

Total Lifetime Contributions

To

From

Total Contributions this Year

To

1

From

Total Contributions last Year

1

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

To

From

Date of the last attended event -

(clear)

To

(clear)

From

Lapsed donors to recover:

FR SYBUNT Group

Search>Advanced Search

Custom Fields

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Summary Fields

Total Lifetime Contributions

1

To

From

Total Contributions this Year

To

1

From

Total Contributions last Year

To

1

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

To

From

Date of the last attended event -

(clear)

To

(clear)

From

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Groups

To find who responded to a specific appeal method:

The screenshot shows a web-based filter interface for 'Contributions'. The interface is organized into several sections with dropdown menus and checkboxes. The 'Donor Responded To' section at the bottom is highlighted with a yellow background.

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)

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

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This year's donors who could be asked again:

FR Donors this year

Search>Advanced Search

Custom Fields

Summary Fields

Total Lifetime Contributions

To

From

Total Contributions this Year

1

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

To

From

Date of the last attended event -

(clear)

To

(clear)

From

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

Smart Groups: Donors Prior Years

Search>Advanced Search

Contributions Tab

Fundraisers Cheat Sheet for Creating Donor Smart Groups

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The screenshot shows a web form titled "Contributions". It contains several sections for filtering and creating donor groups:

- Contribution Dates:** A dropdown menu set to "Prior to Previous Year".
- Contribution Amounts:** Two input fields for "From" and "To".
- Payment Method:** A dropdown menu set to "- any -".
- Thank-you sent?** Radio buttons for "Yes" and "No" (selected), with a "(clear)" link.
- Receipt sent?** Radio buttons for "Yes" and "No" (selected), with a "(clear)" link.
- Contribution is a Test?** Radio buttons for "Yes" and "No" (selected), with a "(clear)" link.
- Financial Type:** A dropdown menu set to "- any -".
- In Honor Of:** An input field.
- Personal Campaign Page:** A dropdown menu set to "- any -".
- Currency:** A dropdown menu set to "- any -".
- Campaigns:** A dropdown menu set to "- select -".
- Contribution Status:** Checkboxes for "Completed", "Pending", "Cancelled", "Failed", and "Refunded".
- Transaction ID:** An input field.
- Contribution is Pay Later?** Radio buttons for "Yes" and "No" (selected), with a "(clear)" link.
- Contribution is Recurring?** Radio buttons for "Yes" and "No" (selected), with a "(clear)" link.
- Contribution Page:** A dropdown menu set to "- any -".
- Contribution Source:** An input field.
- Personal Campaign Page Honor Roll?** Radio buttons for "Yes" and "No" (selected), with a "(clear)" link.

Search>Search Builder

The screenshot shows the "Search Builder" interface. It has a title "Search Builder" and a section "Search Criteria" with a help icon. Below this is the heading "Include contacts where". There are two identical rows of search criteria:

- Each row starts with a dropdown menu set to "Contacts".
- Followed by an input field containing "Group(s)".
- Then a dropdown menu set to "IN".
- To the right of each row is a list of search results. The first row's list includes "FR Donor Solicitors", "FR Donors", "FR Non Donors", and "FR Donors 2011" (highlighted in blue). The second row's list includes "FR Donors", "FR Non Donors", "FR Donors 2011", and "FR Donors 2012" (highlighted in blue).

At the bottom left, there is a link "» Another search field".

How to Make Groups with Good and Bad Mailing Addresses

Management

Administration
(/admin)

[View \(/node/1094\)](/node/1094)[Edit \(/node/1094/edit\)](/node/1094/edit)[Track \(/node/1094/track\)](/node/1094/track)[Convert \(/node/1094/convert\)](/node/1094/convert)

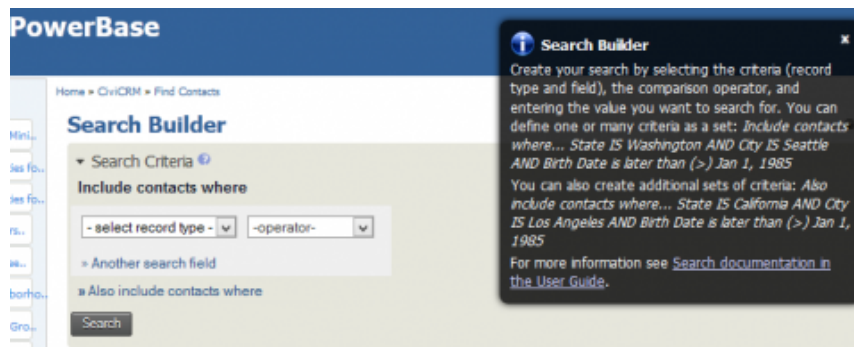
Submitted by Henry (/users/henry) on December 28, 2015 - 2:35pm

Introduction

The best practice for managing contacts' mailing addresses is to make two smart groups:

- one with all the contacts with complete mailing addresses which you can use for generating mailing labels and letters, and
- another group with incomplete mailing addresses, which is a group you can use to target your data cleaning efforts.

In order to find contacts based on their addresses, you'll need to use **Search Builder**. Click **Search > Search Builder** to get to the **Search Builder** screen as shown below.



You will be searching for different component parts of mailing address: street address, city, state and zip code. If they are there, you have probably have a good address. That's the best we can do, since it's not possible to tell if an address that is entered is invalid. Only the Post Office can tell us that. If some are missing (called NULL in database language), you have a bad mailing address.

To work with Search Builder, you first select the record type. In this case, you will be using **Contacts**. Selecting it will open up another drop down **-select field-** where you can select the parts of the address. Then you select the **Location Type** of the address. In this search we are going to look at the **Primary** location, because it will typically be the address that you are using for mailing. However, you can check any of the other address types using this technique as well. Finally you select the **-operator-** which is computer speak for the type of comparison you will be making. We will be looking for either **Null** or **not Null**. Null simply means that there is no data in the field.

Search Builder

▼ Search Criteria ⓘ

Include contacts where

Contacts ▼ City ▼ Home ▼ -operator- ▼

> Another search field

» Also include contacts where

Search

Home
Work
Main
Other
Billing
Mailing
Branch
Web
Primary

Access

Looking for Incomplete Mailing Addresses

For incomplete mailing addresses, the idea is that we want to find any contact that has any of the key address fields blank. So we're looking for any contact that doesn't have a **Street Address** OR any contact that doesn't have a **City** ****OR any contact that doesn't have a **State** OR any contact that doesn't have a **Zip Code** (currently known as **Postal Code** in CiviCRM). We will then save the results in a Smart Group. This will let us go through those contacts to clean up their addresses later.

Choose **Contact** in the first dropdown. Select **Street Address** in the dropdown that appears next to it. Choose **Primary**, which is the address type. Choose **IS EMPTY** in the **-operator-** dropdown.

Select **Also include contacts** where below, and do the same thing again but choose **City**. Using **Also include contacts** where again, repeat the above steps for **State** and **Postal Code**.

Search Builder

▼ Search Criteria ⓘ

Include contacts where

Contacts ▼ Street Address ▼ Primary ▼ Is Empty ▼

> Another search field

Also include contacts where

Contacts ▼ City ▼ Primary ▼ Is Empty ▼ ⓘ

> Another search field

Also include contacts where

Contacts ▼ State ▼ Primary ▼ Is Empty ▼ ⓘ

> Another search field

Also include contacts where

Contacts ▼ Postal Code ▼ Primary ▼ Is Empty ▼ ⓘ

> Another search field

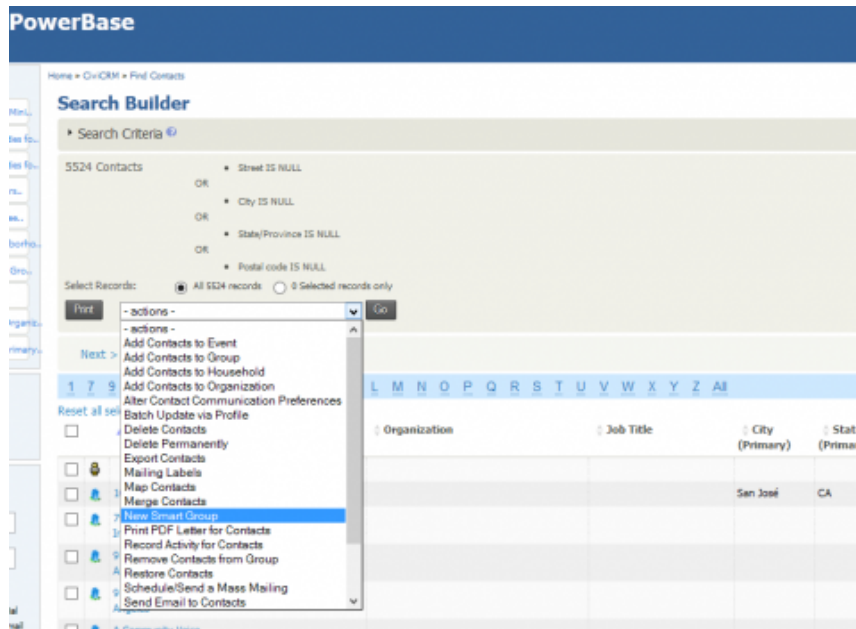
» Also include contacts where

Search

Make a Smart Group of the results. Call it **GEN Incomplete Mailing Addresses**.

As you enter complete addresses in the address fields of these contacts, the group will get smaller.

Why the prefix GEN in both of these groups? We recommend adopting a naming convention to manage groups. For groups that will be of general use, we recommend starting their name with "GEN". Feel free to use something else if you prefer.



Category:

Collecting and Managing Contact Information

266 reads

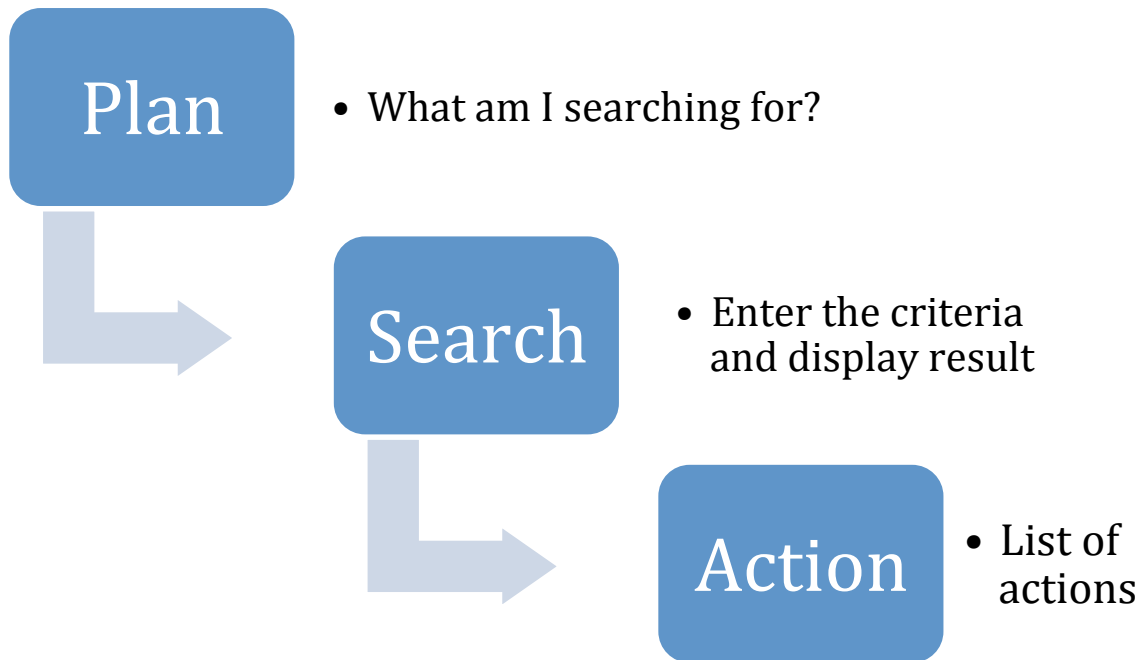
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Tips on Advanced Search



PLAN

Advanced Search requires two major decisions:

- ➡ 1. What are the criteria that I want to use to filter the data?
- ➡ 2. What type of data do I want to display on the list?

It leads to the next step that follows advanced search, which is: what action, if any, do I want to do to the results of my search?

Ask yourself these questions:

Where is the data that I will use for the criteria?

- Is it in the contact record?
- Or is it in one or more related tables such as an activity or event participation?
- Does the target of the search have to meet *all* of my criteria? Or am I looking for *any* results that meet *some* of the criteria?
- Will I be looking inside an existing group of contacts? Or contacts, activities or contributions with a specific tag?
- Can I reuse a prior search that I or someone else saved?

What result do I want?

- Am I looking for individuals? For organizations?
- Am I looking for a list of Activities? Contributions? Event Participation? Memberships?

2012 Progressive Technology Project Powerbase Curriculum

SEARCH

You will find the advanced search by going to **Search->Advanced Search**

The Advanced Search Screen is full of fields to select from and it can be quite intimidating.

Here are some guidelines:

- Not all fields that can be searched are exposed when you first open it. You can expand the dark grey bar (we sometimes call them accordians) by clicking on the triangle to the left of the title.

The screenshot shows the 'Advanced Search' page in the PowerBase Training system. The 'Search Criteria' section is expanded, showing various search fields. Key elements highlighted with red circles include the 'Search Views' dropdown menu (currently set to 'default view'), the 'Display Results As' dropdown menu (currently set to 'Contacts'), and the 'Search' button. A blue arrow points to the 'Communication Details' section at the bottom of the form.

- The “Basic Criteria” section has some noteworthy options that can determine the *appearance* of your results as well as some of the *content*. The “Search views” option lets you pick which contact data should appear on the search results (this only applies to Contacts search results.) You can change which record types you see from default view showing contact recordss to seeing event participation records, or activities or contributions just by selecting the “Display Results as” box as shown in the next screen shot.

The screenshot displays the 'Advanced Search' page in the PowerBase Training system. The page has a navigation bar at the top with links like Home, Search, Contacts, Contributions, Mailings, Events, Memberships, Campaigns, Reports, Administer, Help, Data Entry, and Logout. On the left, there's a sidebar with 'Recent Items' (Mark Sherman) and 'Management' (Administration). The main content area is titled 'Advanced Search' and contains a 'Search Criteria' section. This section includes fields for 'Complete OR Partial Name', 'Complete OR Partial Email', 'Contact Type(s)', 'Group(s)', 'Select Tag(s)', 'All Tags', 'Exclude/Include by Privacy Option(s)', 'Contact Source', 'Contact ID', 'CMS User?', 'External ID', 'Preferred Communication Method', 'Job Title', and 'Preferred Language'. A 'Search Operator' dropdown is set to 'AND', and a 'Display Results As' dropdown is open, showing a list of options: Contacts, Contributions, Event Participants, Activities, Memberships, Cases, and Related Contacts. Red circles highlight the 'Search Operator' and 'Display Results As' dropdowns.

OR/AND Options

Advanced Search is designed to narrow your result set as you select more and more criteria. This is the idea that it “ANDs” criteria together so it must have all the criteria to pass the filter. So for example, if you select that the contact type must be an individual AND that their preferred language must be Spanish, you will get only Spanish speakers as a result. You can change that, if you like, by switching the “Search Operator” to “OR”. This will cause the test to be whether the contact is an individual OR speaks Spanish. That’s a nonsense search as you will get all the individuals and you don’t need the Spanish language test but hopefully it gives you the idea of how it might work.

That being said, Advanced Search mostly “ANDs” criteria together and the more you add criteria, the smaller the list. In some cases, though, it will “OR” criteria together even if you’ve selected “AND” as the “Search Operator.” The next screen gives an example of where this would happen.

The screenshot shows the 'Advanced Search | PowerBase Training' interface. The top navigation bar includes links for Home, Search, Contacts, Contributions, Mailings, Events, Memberships, Campaigns, Reports, Administer, Help, Data Entry, and Logout. The main content area is divided into two sections:

- Constituent Info - Individuals:**
 - Constituent Type:** A grid of checkboxes. 'Staff' and 'Intern' are checked. Below the grid is a checked box labeled 'Check to match ANY; uncheck to match ALL'.
 - Other Name:** A text input field.
 - Staff Responsible:** A dropdown menu set to '-select-'.
 - Date Started - From:** A date picker.
 - How Started:** A dropdown menu set to '-select-'.
- Grassroots Info:**
 - Member Status:** A dropdown menu set to '-select-'.
 - Leadership Level:** A dropdown menu set to '-select-'.
 - Issues Interest:** A grid of checkboxes including 'Immigrant Rights', 'Economic Justice', 'Workers Rights', 'Environmental Justice', 'Lead Poisoning', 'Computer Lab', 'Transportation Equity', and 'Parks'. A checked box labeled 'Check to match ANY; uncheck to match ALL' is at the bottom.
 - Volunteer Interests:** A grid of checkboxes including 'Canvassing', 'Phone Banking', 'Office/Admin', 'Tabling', and 'Event Support'. A checked box labeled 'Check to match ANY; uncheck to match ALL' is at the bottom.

Take a look at “Constituent Type.” Say that we’re looking for a list of staff members and interns, so we check the boxes next to them. If we want to bring up a list of the staff members and the interns, we need to work with the box labeled “Check to match ANY, uncheck to match ALL”. By checking it, we’ve asked for anyone labeled “Staff” OR labeled “Intern”. If we don’t check the box labeled “Check to match ANY, uncheck to match ALL”, we’ll get only those people are who are marked as “Intern” AND “Staff”.

The Tables That are Searchable

PowerBase is an enhanced version of CiviCRM. It has been changed to track more information about individuals and organizations that is of specific interest to community organizing. Most of these fields are kept in the “accordion” group called “Custom Fields”. Expand it and you’ll see the “Constituent Info – Individuals”, “Grassroots Info”, “Demographics”, “Voter Info”, “Media Info”, and “Funder Info”; all of which apply to individuals. Look further and you’ll see similar groups of fields for Organizations: “Constituent Info – Organizations”, “Organizational Details”, “Media Outlet Info” and so on. “Communications Details” applies to both organizations and individuals.

All of the custom fields just listed apply to the Contact table, which is designed to have one contact entry for every person or organization in your database. CiviCRM and PowerBase also include more standard fields for Contacts, such as “Address Fields” and “Demographics”, which round out the list of field groups that specifically describe a Contact on a one per one basis. In case you’re wondering, it’s easy to add or subtract fields and their related options to the “Custom Fields”; it’s not so easy to do so with many of the standard fields that are part of the core CiviCRM software.

Searching with Related Tables

There are other tables used in PowerBase and all of them may have more than one entry per organization or individual (Contact). These are “Activities”, “Relationships”, “Notes”, “Contributions”, “Memberships”, “Events” (participation), “Change Log”, “Mailings”, and “Pledges”.

You can unlock the power of your PowerBase by combining search fields from multiple tables. For instance, you can use the fields in these tables to find people that made donations during a period of time, or attended a type of event, such as leadership meetings. You can combine those criteria to find which leaders have attended events AND made a contribution. Or you can find out which of your media contacts has clicked on the links in your email. This is data mining – looking through all your data to build a picture of who you are engaged with and then acting on that information.

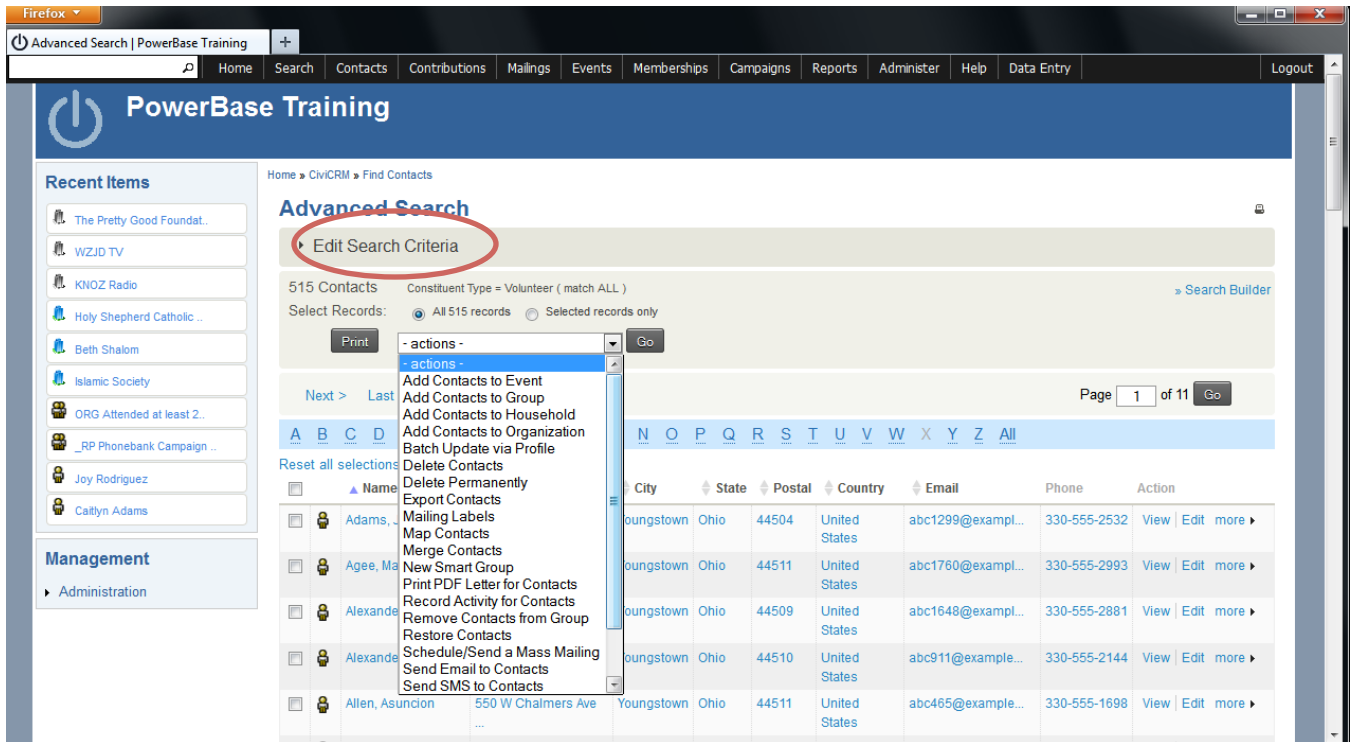
Action

Once you have your criteria selected, the next step is to hit the “Search” button and see what you get. If there aren’t any matches, you’ll get a message to that effect at the bottom of the screen. If there are matches, you’ll get a list similar to this one:

The screenshot shows the PowerBase Training Advanced Search interface. The top navigation bar includes links for Home, Search, Contacts, Contributions, Mailings, Events, Memberships, Campaigns, Reports, Administer, Help, Data Entry, and Logout. The main header displays the PowerBase Training logo and the breadcrumb path: Home » CivCRM » Find Contacts. The Advanced Search section shows 515 contacts with the filter 'Constituent Type = Volunteer (match ALL)'. The 'Select Records' section has a red circle around the '-actions-' dropdown menu. Below this, there is a table of contacts with columns for Name, Address, City, State, Postal, Country, Email, Phone, and Action. The table lists 10 contacts, including Adams, Jacqueline, Agee, Mary, Alexander, Joseph, and others.

Name	Address	City	State	Postal	Country	Email	Phone	Action
Adams, Jacqueline	2352 Coronado Ave	Youngstown	Ohio	44504	United States	abc1299@email.com	330-555-2532	View Edit more ▶
Agee, Mary	532 W Princeton Ave	Youngstown	Ohio	44511	United States	abc1760@email.com	330-555-2993	View Edit more ▶
Alexander, Joseph	645 N Hazelwood Ave	Youngstown	Ohio	44509	United States	abc1648@email.com	330-555-2881	View Edit more ▶
Alexander, Scottie	808 Crandall Ave	Youngstown	Ohio	44510	United States	abc911@email.com	330-555-2144	View Edit more ▶
Allen, Asuncion	550 W Chalmers Ave ...	Youngstown	Ohio	44511	United States	abc465@email.com	330-555-1698	View Edit more ▶
Allen, Rosilee	1216 5Th Ave	Youngstown	Ohio	44504	United States	abc2060@email.com	330-555-3293	View Edit more ▶
Alt, Ida	250 Tod Ln	Youngstown	Ohio	44504	United States	abc1300@email.com	330-555-2533	View Edit more ▶
Alvarez, Cruz	23 N Montgomery Ave	Youngstown	Ohio	44506	United States	abc1048@email.com	330-555-2281	View Edit more ▶
Anderson, Idella	226 S Jackson St	Youngstown	Ohio	44506	United States	abc2361@email.com	330-555-3594	View Edit more ▶
Anderson, John	3871 S Schenley Ave	Youngstown	Ohio	44511	United States	abc1977@email.com	330-555-3210	View Edit more ▶

Note the field with the word “-actions-” in it. If you click on the triangle next to it, you’ll get a dropdown list of all the things you can do with the records on the list. Whenever you see a list like this, whether you get it from Advanced Search or some other search, check out the action list, there are lots of things that you can do from it. See the next screenshot for a partial list.



We're not able to go into all the actions in this document, but there is one that we'd like to highlight – "New Smart Group".

If you select "All nnnn records" and "New Smart Group", PowerBase will remember the criteria of your search and update the list of contacts with the latest selection the next time you open a group.

When you create the smart group or if you create a static group, make sure you mark the group as "Mailing List" if you intend to send an email to them.

Action with Other Tables

Let's say you did a search of your volunteers and you realize that you want to see what events they've gone to. You can change the search results by clicking on the "Edit Search Criteria", which will take us back to our original search criteria. Once we are there, we can change the "Display Results As" to "Event Participants"

The screenshot shows the 'Advanced Search' page in the PowerBase Training system. The 'Edit Search Criteria' section is active, and the 'Display Results As' dropdown menu is highlighted with a red circle, showing 'Event Participants' as the selected option. Other search criteria include 'Complete OR Partial Name', 'Complete OR Partial Email', 'Contact Type(s)', 'Group(s)', 'Select Tag(s)', 'All Tags', 'Search Views', 'Search Operator', 'Preferred Communication Method', 'Contact Source', 'CMS User?', 'Contact ID', 'External ID', 'Job Title', and 'Preferred Language'.

Once we click “Search” again, we now have an entirely different list: all the events that these contacts have been registered for.

The screenshot shows the 'Advanced Search' results page. The '881 Results - Event Participants' text is circled in red. Below the search criteria, a table displays the results for 881 records. The table has columns for Participant, Event, Fee Level, Amount, Registered, Event Date(s), Status, and Role. The results show a list of participants and their registration details for various events.

Participant	Event	Fee Level	Amount	Registered	Event Date(s)	Status	Role
Morley, Harold	2011 Event 1	(no fee)		January 4th, 2011	January 4th, 2011 - January 5th, 2011	Attended	Attendee
Mccain, Katrina	2011 Event 1	(no fee)		January 4th, 2011	January 4th, 2011 - January 5th, 2011	No-show	Attendee
Murphy, Mary	2011 Event 1	(no fee)		January 4th, 2011	January 4th, 2011 - January 5th, 2011	Attended	Attendee
Mitulinski, Thomas	2011 Event 1	(no fee)		January 4th, 2011	January 4th, 2011 - January 5th, 2011	Attended	Attendee
Robinson, Mildred	2011 Event 1	(no fee)		January 4th, 2011	January 4th, 2011 - January 5th, 2011	Attended	Attendee
Dixon, William	2011 Event 1	(no fee)		January 4th, 2011	January 4th, 2011 - January 5th, 2011	Attended	Attendee

The actions available are different from those available on a contact list, as they are targeted towards participant records.

The screenshot shows the PowerBase Training web application. The top navigation bar includes links for Home, Search, Contacts, Contributions, Mailings, Events, Memberships, Campaigns, Reports, Administer, Help, Data Entry, and Logout. The main header displays the PowerBase Training logo and the breadcrumb path: Home > CIVICRM > Find Contacts.

The "Advanced Search" section shows 881 results for "Event Participants" with the filter "Constituent Type = Volunteer (match ALL)". Below this, there are buttons for "Print", "Actions", and "Go". A dropdown menu is open under the "Actions" button, listing the following options:

- Batch Update Participants Via Profile
- Cancel Registration
- Change Participant Status
- Delete Participants
- Export Participants
- New Smart Group
- Print Event Name Badges
- Send Email to Contacts

The main table displays a list of participant records. The columns are: Name, Event, Fee Level, Amount, Registered, Event Date(s), Status, and Role. The first few rows of the table are as follows:

Name	Event	Fee Level	Amount	Registered	Event Date(s)	Status	Role
Murphy, Mary	2011 Event 1	(no fee)		January 4th, 2011	January 4th, 2011 - January 5th, 2011	Attended	Attendee
Mitulinski, Thomas	2011 Event 1	(no fee)		January 4th, 2011	January 4th, 2011 - January 5th, 2011	Attended	Attendee
Robinson, Mildred	2011 Event 1	(no fee)		January 4th, 2011	January 4th, 2011 - January 5th, 2011	Attended	Attendee
Dixon, William	2011 Event 1	(no fee)		January 4th, 2011	January 4th, 2011 - January 5th, 2011	Attended	Attendee

Participant records are just one type of output, we could also retrieve contribution records or activities or memberships.

Case Study: Purging useless contacts from your Database

Management

Administration
(/admin)

[View \(/node/1103\)](/node/1103)[Edit \(/node/1103/edit\)](/node/1103/edit)[Track \(/node/1103/track\)](/node/1103/track)[Convert \(/node/1103/convert\)](/node/1103/convert)

Submitted by Jamie McClelland (/users/jamie-mcclelland) on March 8, 2016 - 3:52pm

One PowerBase group with over 150,000 records wanted to purge their database. They knew they had a lot of contacts that were just dead weight: no contact information or bad contact information or incomplete names or duplicate records.

Here is the process we went through to clean things up.

First - we identified that we would take two approaches:

- Delete contacts
- De-dupe contacts

We decided that deleting contacts first made more sense - since there would be less contacts to dedupe - which is the far more time-consuming processes.

Deleting Contacts

There are many ways to find and delete contacts, but the hard part is coming up with the criteria.

We started with the idea that if we can't contact the person, they should be removed.

So, we began searching for everyone who didn't have an email address AND didn't have a phone number AND didn't have a city. Since you can't do this type of search in Advanced search, we did it in Search Builder. We used "Primary" as the location type and "Is Empty" as the criteria.

We later changed city to street address - because some people had a city but no street address.

At this point we got to a list of about 4,000. However, we noticed two problems:

- Some people had contribution or event records. We don't want to lose them.
- Some contacts were Organizations that had relationships to contacts with contact information. Probably want to keep this data

To avoid deleting these contacts, we created two more groups using advanced search:

- Everyone with a contribution OR an attendance record (We used the and/or search option for this). We expanded both the contribution and event accordions. For contribution - we simply but both contributions and soft credits to get every conceivable donation. For event, we put an end date of today to match all participation records.
- All organizations with an employer relationship. It does not seem possible to

search for all organizations with any relationship - and all the organization relationships seem to be employer relationships - so this search got all that we needed.

Now that we had these three groups we were ready.

We did an include/exclude search that included everyone without an email/phone /address and excluded everyone *with* a contribution or attendance record and excluded every organization with an employer relationship.

About 3500 records, all of which were deleted.

More criteria needed

3500 records removed from a database with 150,000 records is a great start, but doesn't add up to much.

Next we proposed:

- Delete everyone without a first name OR without a last name (provided they are not in any of our two exclusion groups)
- Delete everyone with just an asterisk as a first name or last name (quite a few of these)

Still waiting to hear back.

Now let's dedupe.... not so fast.

First and last name are critical to de-duping. However, our contacts had some atrocious data in the first and last name.

It turns out that there are many contacts with a last name or first name *plus* an asterisk or a number. It seems these characters were some kind of code in the imported data.

There is no point in de-duping with these characters because we won't get a clean match on first and last name.

Category:

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116 reads

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Strategies around duplicate contacts and merging

Submitted by Jamie McClelland on February 27, 2018 - 1:22pm

Balancing Act

This article covers the concepts around de-duplicating contacts. If you want to jump to the chase and learn how to run the de-dupe process, please see our screen cast on de-duping (</kb/powerbase/getting-rid-of-duplicates-screencast>).

Every organizing strategy has to manage a balancing act when it comes to entering contacts into your database:

1. *On the one hand, we don't want to create duplicates.* If we are importing a record for Alberto, and Alberto is already in the database, we want to update his record, not create a duplicate.
2. *On the other hand, we don't want to update the wrong record.* What if the new Alberto we are bringing into the database is different from the one in our database? If we update our existing record, it will create a big mess.

This balancing act has to be re-enacted in many very different situations. For example:

- When importing a spread sheet
- When a staff person enters a record by hand
- When a person makes a contribution via a public contribution page
- When a person registers for an event
- When someone fills out a profile online or fills out a webform

Dedupe rules

CiviCRM decides whether to create a duplicate or merge with an existing contact based on a set of de-dupe rules.

A de-dupe rule essentially says: Every time a new contact is about to be entered, see if there are any existing contacts in which the following field is the same. If there is an existing contact, then update that contact rather than creating a new one (if there is more than one matching contact, the first one found is updated).

As you can imagine "the following fields" is the critical part.

Some organizers rely exclusively on email address matching rules. If the email address is the same, then we declare it to be the same.

Other situations require more nuance. For example, what if someone registers several people to an event but doesn't know all of their email addresses? They might enter their own email address for all of them.

Some organizers require that the first name, last name and one of the following match: email, phone or street address.

Your dedupe rules page

The best place to start thinking about de-duplication and merging is with your de-dupe rules page.

This page lists the rules that CiviCRM follows when determining if two contacts are the same person or not.

You can access it via: Contacts -> Find and Merge duplicate contacts

The default settings look like this:

Find and Merge Duplicate Contacts

Manage the rules used to identify potentially duplicate contact records. Scan for duplicates using a selected rule and merge duplicate contact data as needed.

[View the Dedupe Exceptions](#)

Household Rules	Usage	
Name and Email	Supervised	Use Rule Edit Rule Delete
Name and Email	Unsupervised	Use Rule Edit Rule Delete

[Add Rule for Households](#)

Individual Rules	Usage	
Name and Address (reserved)	General	Use Rule Edit Rule
Name and Email (reserved)	Supervised	Use Rule Edit Rule
Email (reserved)	Unsupervised	Use Rule Edit Rule

[Add Rule for Individuals](#)

Organization Rules	Usage	
Name and Email	Supervised	Use Rule Edit Rule Delete
Name and Email	Unsupervised	Use Rule Edit Rule Delete

[Access Keys](#) [Add Rule for Organizations](#)

Since we don't use Households, you can ignore those rules.

That leaves rules for handling organizations and rules for handling individuals.

Let's focus on individuals.

You can create as many rules as you want, but you always must have at least one "Unsupervised" rule and at least one "Supervised" rule.

The "Supervised" rule is used by default anytime a contact is added by someone who is logged in and paying attention. In other words, when you manually add a contact.

The "Unsupervised" rule is used all other times. For example: when a user registers for an event or makes a contribution or fills out a profile. In ac (and this is a bit unintuitive), it is also used during imports. While there is a logged in user who is paying attention, they are not able to review even single one of the imported contacts. As a result, the "Unsupervised" rule is used.

What a dedupe rule looks like

If you click to edit a dedupe rule, you can see how it works.

If you pick one that is "reserved" (meaning you can't change the rule), it might look like this:

The screenshot shows a configuration window for a dedupe rule. At the top, a green banner reads: "Configure up to five fields to evaluate when searching for 'suspected' duplicate contact records. ?". Below this are "Save" and "Cancel" buttons. The "Rule Name" field contains "Name and Email (reserved)" with a subtext "Enter descriptive name for this matching rule." The "Usage" section has three radio buttons: "Unsupervised", "Supervised" (which is selected), and "General ?". The "Reserved?" checkbox is checked, indicated by "[x]". A yellow box contains the text: "This reserved rule is pre-configured with matching fields to optimize dedupe scanning performance. It matches on:" followed by a bulleted list: "• Email", "• First Name", and "• Last Name". At the bottom, there are "Save" and "Cancel" buttons.

This rule is pre-configured to trigger if the first name, last name and email address all match.

This screen also shows you how to change a rule's settings from General to Supervised or Unsupervised.

Additionally, you can create your own rules, but that is best left for later.

How do I use these rules?

At any time, you can use these rules to find duplicate records in your database and merge them. That process is covered in our Dedupe screencast (</kb/powerbase/getting-rid-of-duplicates-screencast>).

However, there are many other ways to use these rules.

Importing

When importing contacts, you can choose what to do with duplicate records.

But there's more... you can also choose which dedupe rule you want to use for every individual import.

Import Options

Contact Type ☒ Individual ☐ Household ☐ Organization Subtype

For Duplicate Contacts ☒ Skip ☐ Update ☐ Fill ☐ No Duplicate Checking

Dedupe Rule

For example, your default unsupervised rule might be to match on email address only. That could work for most imports. But one day you might import records that don't have an email address. For that import, you may need to use an import rule that matches on name and street address.

Profiles

If you are collecting data via profiles, you can click the Settings link, then expand the Advanced accordion and modify what action to take if a duplicate is found (note: profiles always use the Unsupervised rule):

What to do upon duplicate match ☐ Issue warning and do not save ☐ Update the matching contact ☒ Allow duplicate contact to be created

This setting only applies to stand-alone forms. If a profile is part of a contribution or event registration form, then the contribution/registration information will always be added to the matched contact (if one is found).

Events

With online event registration pages, you can specify which dedupe rule should be used. By default, the unsupervised rule will be chosen, but you can change it:

Configure Event - Test

Event Links
Find Participants
?

Info and Settings
Event Location
Fees
Online Registration
Volunteers
Sch

If you want to provide an Online Registration page for this event, check the first box

Save
Save and Done
Cancel

Allow Online Registration ☒ Online registration enabled?

Registration Link Text ?

Registration Start Date Time

Registration End Date Time

Register multiple participants? ☐ ?

Same email address? ☐ ?

Duplicate matching rule ?


For example, if you always want duplicates created for event registration, you could specify an impossible to match de-dupe rule for a particular e

How to create your own dedupe rule

Now that you have the big picture, you may want to create some custom de-dupe rules.


You can do that by going to Contact -> Find and merge duplicates and clicking the button to add a new rule.

Here's an example rule that can be useful:

Configure up to five fields to evaluate when searching for 'suspected' duplicate contact records. 

✓ Save ✕ Cancel

Rule Name *
Enter descriptive name for this matching rule.

Usage * ☐ Unsupervised ☐ Supervised ☒ General 

Reserved? ☐

WARNING: Once a rule is marked as reserved it can not be deleted and the fields and weight

Field	Length	Weight
<input type="text" value="First Name"/>	<input type="text" value=""/>	<input type="text" value="3"/>
<input type="text" value="Last Name"/>	<input type="text" value=""/>	<input type="text" value="3"/>
<input type="text" value="Email"/>	<input type="text" value=""/>	<input type="text" value="1"/>
<input type="text" value="Street Address"/>	<input type="text" value=""/>	<input type="text" value="1"/>
<input type="text" value="Phone"/>	<input type="text" value=""/>	<input type="text" value="1"/>
Weight Threshold to Consider Contacts 'Matching':		<input type="text" value="7"/>

✓ Save ✕ Cancel

You can select any field you want from the field drop down.

The length column allows you to specify the length of the field you want to search. For example, if you chose First Name and length 3, then it would match the first 3 characters of the first name, so "Jamie" and "James" would be considered a match. **Despite the usefulness of this feature we discourage its use because it causes your database queries to slow to a crawl and often timeout.**

The weight column describes what score a match should get.

Lastly, the Threshold column determines what total score should decide if it's a duplicate or not.

In the example above, if the first name, last name and email address match, the score would be 3 + 3 + 1, or 7. Since that matches the threshold, it would be considered a duplicate. If the email, phone and street address matched, it would only add up to 3, not enough for the score to match.

So, what should my strategy be?

If in doubt, set your Unsupervised rule to be quite strict (like first name, last name and email address) and regularly search for and merge duplicate records. It's far better to have a database full of duplicates than to try to untangle records that were merged that should not have been merged.

Category:

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Spreadsheet Tips for Importaing

Management

Administration
(/admin)

Tip Sheet or Instructions *Spreadsheet Tips for Importaing* has been updated. 

[View \(/node/1108\)](/node/1108)

[Edit \(/node/1108/edit\)](/node/1108/edit)

[Track \(/node/1108/track\)](/node/1108/track)

[Convert \(/node/1108/convert\)](/node/1108/convert)

Submitted by Jamie McClelland (/users/jamie-mcclelland) on May 6, 2016 - 3:09pm

Before you import a spread sheet, carefully review it to make sure the data makes sense. Importing garbage will cause you pain!

Data -> Text to Columns...

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

Copying values, not functions

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

Function: PROPER

Formula: =PROPER(A1)

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

= PROPER() capitalises the first letter of each word (like Title Case) = UPPER() - forces all letters to be UPPER CASE = LOWER() - forces all letters to be lower case

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

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

Function: VLOOKUP

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

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

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

Function: TRIM

Formula: =TRIM(A1)

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

Function: RIGHT, LEFT, MID

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

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

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

=UPPER(LEFT(A2,1))&LOWER(RIGHT(A2,LEN(A2)-1)) will capitalize only the First letter of a sentence.

Function: IF

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

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

Function: CONCATENATE

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

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Importing Data into CiviCRM

Most organisations have data in sources outside CiviCRM, such as previously used database platforms, spreadsheets created on the fly for specific events or other purposes, and email address books. Because manually entering large amounts of data can be tedious, CiviCRM provides a way to import data en masse if the source can export it into some common format such as a Comma Separated Version (CSV) file.

Imports can also be used to update existing data. This will be covered in the final section of this chapter.

Considerations before importing

For more details on how to think about your data before importing into CiviCRM, please read the section on "Organizing your data", especially "Mapping your data into CiviCRM".

Preparing to import data

Importing data requires considerable attention and care, so we'll present some concepts here that you should know before you start your first import. You can import both core and custom data for contacts, as well as data for event attendance, activities, memberships and contributions. This chapter will focus on the import process for contacts. The processes for other data are similar.

There are two ways to import data:

- from CSV files. Most database and spreadsheet applications (e.g. OpenOffice.org Calc, Google Spreadsheets, Microsoft Excel) can create and manipulate files in this format. It is often easier to view and clean your data when it's in a CSV file than while it's still inside your old database.

Each column in your CSV file will map to a field in CiviCRM, so make sure you use a different column for every distinct bit of information.

Depending on your country or region, fields in your CSV files might be separated by semicolons (;) instead of commas. If so, you'll need to change the Import/Export Field Separator value in the CiviCRM Localization settings by going to the navigation menu and choosing Administer > Configure > Global Settings > Localization.

- from another SQL or MySQL database stored on the same server, using an SQL query. (This option is only for advanced users who have a clear understanding of server and database administration.)

The following rules and recommendations will help you to import data with minimal problems:

- Always test your data import with a small subset of your records. After importing the test set, visit the records within CiviCRM and ensure that the data was imported and functions as you expected.
- It can be helpful to create a test contact that has every attribute you've defined in your existing data set. Then import the contact and check results to ensure that CiviCRM correctly represents all the data.
- When you map the columns or fields from your source data to CiviCRM fields during the import, CiviCRM can save this field mapping as an *import map* for future use. This is helpful if you will be importing multiple files with the same structure. To save an import map for future use, click the "Save this field mapping" check-box at the bottom of the Match Fields screen of the import wizard and enter an appropriate name and description. To reuse a saved import map, select it from the Load Saved Field Mapping dropdown menu on the Choose Data Source screen (step 1) of the import wizard.
- If your imports are timing out or taking too long, try splitting up the imports into smaller batches. If you have the appropriate permissions on your web server, you can also increase the `memory_limit` and `max_execution_time` values in the file `php.ini`.
- You can add all of the contacts imported in an import to new or existing groups or tags. All of the contacts in a single import will be given the same groups and tags. This limitation has a couple effects on your import:
 - Make sure that you assign groups and tags that are applicable to every contact in the imported set. If you need to assign groups or tags on a contact-by-contact basis, import contacts in small, discrete batches in which all contacts share the same tags and groups. Alternatively, you can create searchable custom data fields in CiviCRM that contain the groups and tags that you want to assign to imported contacts. After the import you can run searches on those fields and use the "Add Contacts to Group" or "Tag Contacts" batch actions on the search results.
 - You can use this feature to manage the import. Consider adding contacts to a new group or tag that indicates what batch of imports the contacts were a part of, thereby allowing you to easily identify when a contact was imported and undo an entire import if necessary.
- CiviCRM stores first names and last names in separate fields, so these should appear as separate columns in your CSV file. The same goes for city and postal code/zip code. Most spreadsheet programs contain tools that automate the process of splitting text across fields.
- Ensure that your country names are expressed in the same way as they are in CiviCRM, i.e., 'United States', not 'United States of America', and 'United Kingdom', not 'Britain'.
- If you are importing multiple locations, the first location will be set as the primary location address. You may want to move your columns around to ensure that the desired location becomes the Primary Location. You may also need to split your import so that some records have one type of record as their Primary Location, while others have a different one.
- If you are importing data into multi-choice (e.g. check-box or radio button) custom fields, your data source can use either the label (what's visible to the user in the CiviCRM front end) or the value (what's actually stored in the database for that choice). CiviCRM will recognise it and import it appropriately. When importing into multi-choice core data fields, you can specify only the value(s) in your data source, not the

label.

- If you are updating multiple choice options, new values will replace the entire field. For example, if you update the value of the Colors field to be "orange" for a contact that currently has Colors set to "blue", the result will be that Colors is set to orange, not orange and blue.
- Make sure your data source uses an accepted date format and that you select the same date format on the Choose Data Source screen of the import wizard.
- Make sure any name prefixes and suffixes you use have been set up in the administration interface (go to: Administer > Option Lists****in the navigation menu).
- If you plan to do additional imports of related data that's associated with your contact data, e.g. contribution data, event participation data, membership data, you can make things easier by ensuring that your contact records have unique IDs that are also associated with the related data. When you do the initial import of your contact data, import these unique IDs and map them to CiviCRM's External ID field, so that you can then use your original (or legacy data) IDs to match to the contact records records for later imports of the related data.
- Master Address Belongs To is a special import field that only works with the CiviCRM_Address.id. The information needed to use this field for imports is only available directly from the MySQL database tables directly. They are not shown anywhere in CiviCRM including on data screens, link urls, profiles, or exports. [Information on how to use this special field is available in the Wiki.](#)

Required Fields for Contact Imports

When preparing your data import it is helpful to know what fields are required for Import. You'll want to be sure that these fields are included in your CSV import file. Below is a list of the required fields. They are marked red and starred in the interface. In case you have less data, **selecting one field is enough**. The External Identifier field is only useful if you want to update existing contacts. Please note that the field with the identifier (**Match to Contact**) is required for deduplication purposes.

- Email (Match to Contact)
- External Identifier
- First Name
- Last Name

Setting up a CSV file for importing

Example of spreadsheet .csv format

First Name	Last Name	Grade	Student Number	Contact SubType	Father First Name	Father Last Name
Yonce	Johns	1	Student-111	Student	Meeka	Colla
Sophia	Camp	1	Student-112	Student	Jan	Rodney
Bel	Jason	1	Student-113	Student	Jillie	Jason
Lizzy	Bell	1	Student-114	Student	Martia	Bell
Helen	White	1	Student-115	Student	Karen	White
Isaac	Bell	2	Student-221	Student	Martia	Bell
Josie	Zen	2	Student-222	Student	Betty	Zen
Jenny	Zen	2	Student-223	Student	Betty	Zen
Anni	Stinson	2	Student-224	Student	Maggie	Stinson
Shane	Stinson	2	Student-225	Student	Maggie	Stinson
Al	Jason	3	Student-333	Student	Jillie	Jason
Ella	White	3	Student-334	Student	Karen	White
Greg	Camp	3	Student-335	Student	Jan	Rodney
Smita	Johns	3	Student-336	Student	Meeka	Colla
Lee	Stinson	3	Student-337	Student	Maqqle	Stinson

When thinking about setting up your spreadsheet, think about the data that you are collecting and plan out your column headings. Keep in mind that you may need to create more than one .csv file and perform multiple imports before you are finished.

If you plan to import related data that pertains to a specific contact, e.g. event participant information, contribution data, etc., you will need to make sure that each contact record has a unique identifier or the contact record should have First Name, Last Name and Email, so that you can link their related data during later imports. If you have unique ID, you would map the ID to CiviCRM's External Identifier on import.

Running an import

The import process has four steps.

Step 1: Setup

Setup lets you specify the basic details of your import, including the source of the data. Data can come from either a CSV file, or an SQL query of a database on your server. A check-box lets you indicate whether the first row of your file contains column headers.

The screenshot shows the 'Import Contacts' wizard interface. At the top, there's a progress bar with four steps: '1. Choose Data Source' (active), '2. Match Fields', '3. Preview', and '4. Summary'. Below the progress bar, the title 'Choose Data Source (step 1 of 4)' is displayed. A yellow-bordered box contains a helpful note: 'The Import Wizard allows you to easily import contact records from other applications into CiviCRM. For example, if your organization has contacts in MS Access® or Excel®, and you want to start using CiviCRM to store these contacts, you can 'import' them here. ?'. Below this, there are 'Continue' and 'Cancel' buttons. The 'Choose Data Source' section has a 'Data Source' dropdown menu set to 'Comma-Separated Values (CSV)'. The 'Upload CSV File' section includes an 'Import Data File' field with a 'Choose File' button and 'No file chosen' text. Below this, it states: 'File format must be comma-separated-values (CSV). File must be UTF8 encoded if it contains special characters (e.g. accented letters, etc.). Maximum Upload File Size: 2 MB'. There is a checked checkbox for 'First row contains column headers' with a note: 'Check this box if the first row of your file consists of field names (Example: 'First Name','Last Name','Email')'.

Note that imports use the default **unsupervised** rule to decide whether a contact record is a duplicate (refer to the *Deduping and Merging* chapter in this section for information on duplicate matching rules in CiviCRM). You can specify what action to take when an import encounters a duplicate:

- **Skip**: skip the duplicate contact, i.e. leave the original record as it is.
- **Update**: update the original record with the database fields from the import data. Fields that are not included in the import data will be left as they are.
- **Fill**: fill in the additional contact data from the import data fields that are missing or blank in the original records, and leave fields which currently have values as they are.

- **No Duplicate Checking:** this inserts all valid records without comparing them to existing contact records for possible duplicates.

Import Options

Contact Type ☒ Individual ☐ Household ☐ Organization ? Subtype - select - ?

For Duplicate Contacts ☒ Skip ☐ Update ☐ Fill ☐ No Duplicate Checking ?

Dedupe Rule - select - ?

Import Field Separator , ?

Date Format ☒ yyyy-mm-dd OR yyyymmdd (1998-12-25 OR 19981225) OR (2008-9-1 OR 20080901)
☐ mm/dd/yy OR mm-dd-yy (12/25/98 OR 12-25-98) OR (9/1/08 OR 9-1-08)
☐ mm/dd/yyyy OR mm-dd-yyyy (12/25/1998 OR 12-25-1998) OR (9/1/2008 OR 9-1-2008)
☐ Month dd, yyyy (December 12, 1998)
☐ dd-mon-yy OR dd/mm/yy (25-Dec-98 OR 25/12/98)
☐ dd/mm/yyyy (25/12/1998) OR (1/9/2008)
 Select the format that is used for date fields in your import data.

Import mappings tell CiviCRM how the fields of data in your import file correspond to the fields in CiviCRM. The first time you import from a particular data source, it's a good idea to check the box to "Save this field mapping" at the bottom of the page before continuing. The saved mapping can then be easily reused the next time similar data is imported, by requesting that it be loaded at this step.

Step 2: Match the fields

If you had column headings in your file, these headings will appear in the first column on the left-hand side of the Field Map, while the next two columns show two rows of data in your file to be imported, and the fourth column is the Matching CiviCRM Field. If you loaded an import mapping in Step 1, your choices will be reflected here. You can change them if they are inappropriate for this import.

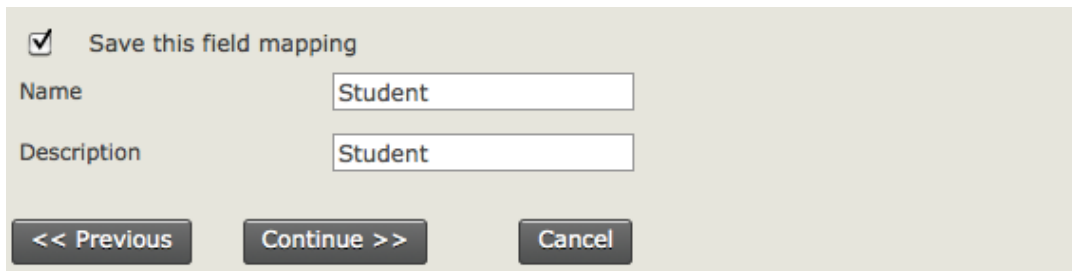
Match Fields (step 2 of 4)

Column Names	Import Data (row 1)	Import Data (row 2)	Matching CiviCRM Field
Title	MS	Mr	Individual Prefix
First Name	Paula	Peter	First Name *
Middle Name	A	William	Middle Name
Last Name	Smarts	Smarts	Last Name *
Nick Name		Pete	Nick Name
Email	psmarts@gmail.com	petesmarts@gmail.com	Email *

The matching CiviCRM fields include standard CiviCRM data such as First Name and Last Name as well as any custom data fields that have been configured for use with contact records on your site. Match the fields by clicking the dropdown list and selecting the appropriate data. For example, if the heading of the second column in your input is Surname, you should choose Last Name as your Matching CiviCRM Field.

Select "- do not import -" for any columns in the import file that you don't want to import into CiviCRM.

If you have a saved mapping for a specific set of spreadsheet columns, and your spreadsheet layout has changed (for instance, you need to import additional fields, so you add the appropriate columns of data in the spreadsheet), you can modify and save the field mapping. One tip to ease the mapping process when you need to import additional fields is to place the additional columns of data in your import spreadsheet to the right of the columns you've previously mapped in CiviCRM. This allows you to use the existing saved field mapping to map the initial import fields, and then continue mapping the new data fields.



Note that if you add new data columns in your spreadsheet and do not position the columns AFTER the columns you previously mapped, you then can't use the saved mapping and will have to map all your import fields again.

Once you've mapped your fields, you can decide if you want to keep the original saved mapping unchanged, or check the box to "Update this field mapping" to include the new field mappings.

Step 3: Preview

This screen previews the results of importing your data, reports the number of rows to be imported, and allows you to double check your field matches.

If some of the rows in your spreadsheet contain data that doesn't match CiviCRM's requirements for one or more fields, you'll see an error message with a count of the invalid rows (see the screenshot below). Click the Download Errors link and review the errors reported in the downloaded file, so you can fix them before doing the import.

Preview (step 3 of 4)

Total Rows	6	Total number of rows in the imported data.
Rows with Errors	6	Rows with invalid data in one or more fields (for example, invalid email address formatting). These rows will be skipped (not imported). » Download Errors
Valid Rows	0	Total rows to be imported.

At the bottom of the form, you can choose to add the contacts to an existing group, import to a new group, create a new tag, or tag imported records. Adding imported records to a separate group is strongly recommended in order to be able to quickly find the imports and, if necessary, delete and reimport them.

Home Phone	415-586-1000	415-282-5000	- do not import -
Fatheremail	rello@sbcglobal.net	jrody@yahoo.com	- do not import -
Motheremail	c3jon@yahoo.com	dean@tworks.com	- do not import -
Grade SIS	1	1	Grade SIS :: School Information

► Add imported records to a new group

▼ Add imported records to existing group(s)

Keeping Up with the Joneses

Newsletter Subscribers

School

Student_Parent

Summer Program Volunteers

► Create a new tag and assign it to imported records

► Tag imported records

<< Previous

Import Now >>

Cancel

Step 4: Summary

The final screen reports the successful imports along with Duplicate Contacts and Errors. If you have set the import to add all contacts to a Group or Tag, you can click through to see your imported contact records.

Import has completed successfully. The information below summarizes the results.

√1. Choose Data Source

√2. Match Fields

√3. Preview

»4. Summary

Summary (step 4 of 4)

Total Rows	15	Total number of rows in the imported data.
Total Contacts	15	Total number of contact records created or modified during the import.
Import to Groups	School: 15 contacts added to this existing group.	

Done

At this point it makes sense to check to make sure that your import has worked as expected. Search for the contacts that you just imported and examine their fields and custom data to make sure all is as expected.

Importing relational data

We have just described the process of importing one data file. But what about if you want to import related data, like organizational addresses with employees, parent child relationships, activities, contributions, etc.? For each type of data you want to import, you will need to import a separate CSV file.

CiviCRM has specific tools for importing related contact data and a set of specific import tools for contributions, memberships, event participation etc. (and you should see specific chapters for details of how to use these tools). To import relationships, you should run multiple contact imports.

For example if we want to import data for children and then for both parents, we run three imports, one for the child, one for the father and one for the mother.

We first import the child remembering to include an external identifier that we can use to match the child to their parents. We then import the father, and then the mother, as related contacts, linking them to the child using the child's external identifier.

In the example below we have one CSV file which contains father and mother information. We use this CSV file twice as part of the import. Have a look at the fields below to understand what is happening.

Review the values shown below from the first 2 rows of your import file and select the matching CiviCRM database fields from the drop-down lists in the right-hand column. Select '- do not import -' for any columns in the import file that you want ignored.

If you think you may be importing additional data from the same data source, check 'Save this field mapping' at the bottom of the page before continuing. The saved mapping can then be easily reused the next time data is imported.

√1. Choose Data Source

»2. Match Fields

3. Preview

4. Summary

Match Fields (step 2 of 4)

Column Names	Import Data (row 1)	Import Data (row 2)	Matching CiviCRM Field
First Name	Yonce	Sophia	First Name *
Last Name	Johns	Camp	Last Name *
Grade Level	1	1	- do not import -
Student Number	Student-111	Student-112	External Identifier *
Contact SubType	Student	Student	- do not import -
Father First Name	Meeka	Jan	Child of First Name *
Father Last Name	Colla	Rodney	Child of Last Name *
Contact SubType	Parent	Parent	Child of SubType :: School Information

Mother First Name	Cento	Dean	- do not import -
Mother Last Name	Johns	Camp	- do not import -
Contact SubType	Parent	Parent	- do not import -
Home Phone	415-586-1000	415-282-5000	Child of Phone Home Phone
Fatheremail	rello@sbcglobal.net	jrody@yahoo.com	Child of Email * Home
Motheremail	c3jon@yahoo.com	dean@tworks.com	- do not import -
Grade SIS	1	1	- do not import -

☒ Save this field mapping
 Name
Description

We are linking the father to the original child using the external identifier and are then importing the related father name using the 'Child of' relationship type.

When the import is done, go back and verify the data by searching for the parent and examining the relationship tab. They should have a relationship linking them to the child.

You can then repeat this process for the mother, and also for other relationships as necessary.

Address standardisation

For many organisations, an important element of cleaning your data is standardising addresses. In the US, this means conform to conventions defined by the United States Postal Service's Standards for Addresses. Standardising how addresses are entered into CiviCRM will allow for more accurate search results when searching by address, as CiviCRM can parse addresses based on the USPS standards if you choose to do so. To find out more about how Address Parsing is handled and used in CiviCRM, refer to the Installation chapter of the Configuration section of this manual. When adding or editing contacts, you will enter and edit such address elements as street number, street name, and Apt/Unit/Suite number according to these standards.

Import Activities

When preparing your data import it is helpful to know what fields are required for Import. You'll want to be sure that these fields are included in your CSV import file. Below is a list of the required fields.

10 of 13 The Contact ID field is used to cross reference and attach the activity to the contact so it must match the contact ID of the contact in the system exactly. <http://docs.civicrm.org/user/e...>

- Activity Date
- Activity Type IDs
- Activity Type Label
- Contact ID (Match to Contact)
- Subject

The import tool for Activities is similar to that of contacts, but there are some pre-requisites which must be met before running the import. Firstly, Activities cannot be imported unless the contacts and Activity Types already exist in the database. If you need to import Activities for contacts that are not yet available, run a contact import first, preferably including a unique external identifier (most often an ID assigned by the database or application you are importing records from).

Remember, CSV files must be less than 2MB in size. If the file size exceeds this, create multiple CSV files and distribute the data between them.

Import Contributions

You can insert new contributions or update existing ones.

If you **insert new contributions**, your CSV file must include at least the following fields:

- Contact Id or External Identifier or all the fields used in your Unsupervised Duplicate Matching rule (to match to an existing contact)
- Financial Type
- Total Amount

If you want to **update existing contributions**, your CSV file must include at least the following fields:

- Transaction ID or Invoice ID or Payment ID (to match to an existing contribution)
- Financial Type
- Total Amount

You can also use **update existing contributions** to import new or change existing data in other core or custom contribution fields. When doing this you will still need to include an ID to match to an existing contribution and the Financial Type and Total Amount fields in your CSV file, even if the values you import for those fields are no different from the values already in your database.

Import Memberships

You can insert new memberships or update existing memberships.

If you **insert new memberships** your CSV file must include at least the following fields:

- Membership Type
- Membership Start Date

If you want to **update existing memberships** your CSV file must include at least the following fields:

- Membership Id (to match to an existing membership)
- Membership Type
- Membership Start Date

You can also use **update existing memberships** to import new or change existing data in other core or custom membership fields. When doing this you will still need to include Membership ID to match to an existing membership, and the Membership Type and Membership Start Date fields in your CSV file, even if the values you import for those fields are no different from the values already in your database.

Import Participants

In each import session you can either insert new registrations or update existing participant records.

If you **insert new registrations** you need to decide whether to restrict registrations for each event to just one per person (set **On duplicate entries** to **Skip**) or to allow duplicate registrations for the same event from a given contact (set **On duplicate entries** to **No Duplicate Checking**). In either case your CSV file must include at least the following fields:

- Contact Id or External Identifier or all the fields used in your Unsupervised Duplicate Matching rule (to match to an existing contact)
- Event ID
- Participant Status

If you want to **update existing registrations**, you should set **On duplicate entries** to **Update**. Your CSV file must include at least the following fields:

- Participant ID (to match to an existing registration)
- Event ID or Event Title
- Participant Status

You can also use **update existing registrations** to import new or change existing data in custom participant fields. When doing this you will still need to include Participant ID to match to an existing registration, and the Event ID or Event Title and Participant Status fields in your CSV file, even if the values you import for those fields are no different from the values already in your database.

Import Tags

There is currently no inbuilt way of importing tags into GiveCRM. You can use [this plugin extension](http://docs.giveworm.com/user/e...) though.

If you want to assign individual tags during your contacts import, you will have to either:

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- split your CSV file by individual tags and import each subset separately as described above,
- create temporary custom fields and import tags into them as standard data, then after the import use advanced searches to isolate contacts with particular values and mass tag them. Once you're done, you can remove the custom fields.

Creating Profiles for Online Data Collection

Management

Administration
(/admin)

[View \(/node/1091\)](/node/1091)
[Edit \(/node/1091/edit\)](/node/1091/edit)
[Track \(/node/1091/track\)](/node/1091/track)
[Convert \(/node/1091/convert\)](/node/1091/convert)

Submitted by Henry (/users/henry) on December 22, 2015 - 2:53pm

Preparing a Profile Form for Online Event Registration Signups, Contributions or to Collect Email Addresses

Introduction

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

First Name

Last Name

E-mail address

Home Zip code

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

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

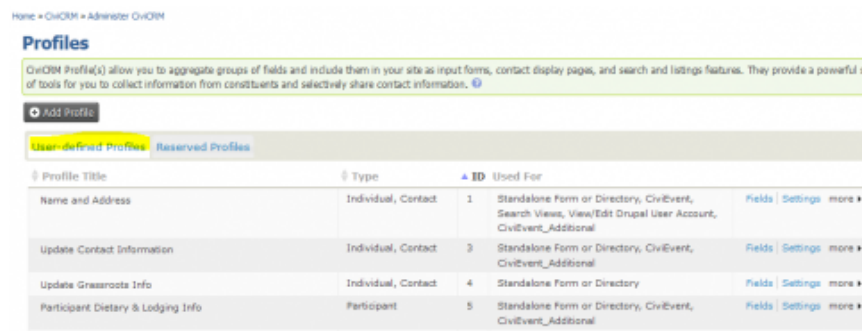
Once you define the information you would like to collect, you will need to create a "profile". Profile is an arrangement of one or more data fields that are in your database. Profiles can be used to collect new data, change field data or to display data. Profiles can contain information from the contact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

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**.

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.



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.

Preparing for a Profile

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

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

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.

Category:

Collecting and Managing Contact Information

253 reads

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