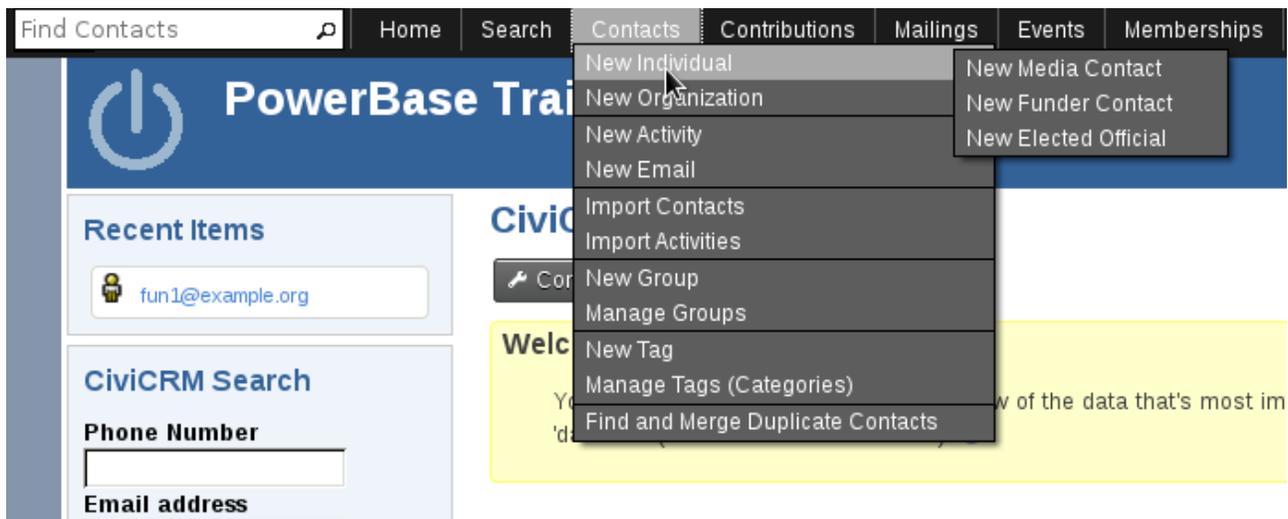


Creating an individual Contact

Creating a contact is one of the first steps in learning how to use PowerBase. Begin by clicking the Contact menu and selecting New Individual.



You have the option of creating a Media, Funder or Elected official contact. However, if you simply click the New Individual link you will create a generic new individual, which is the most common type of individual contact you will be using.

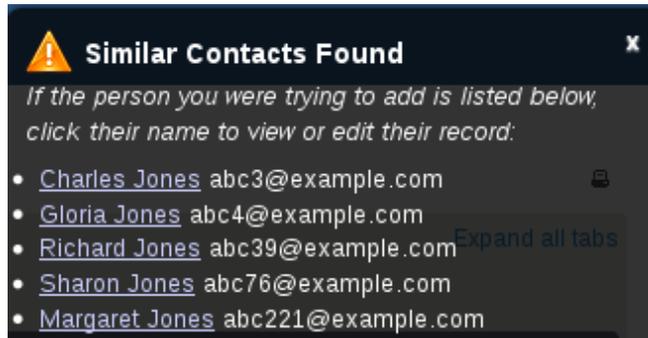
The most common fields to fill in are in the Contact Details section at the top:

A screenshot of the 'Contact Details' form in the PowerBase application. The form is organized into several sections. The top section contains fields for 'Prefix', 'First Name', 'Middle Name', 'Last Name', and 'Suffix'. Below this is the 'Current Employer' field with a search icon, and 'Job Title' and 'Nickname' fields. The 'Contact Type' is set to '- select -'. The next section includes 'Email' (with an 'add' link and a 'Home' dropdown), 'On Hold?' (checkbox), and 'Bulk Mailings?' (radio button). There is also a 'Signature' dropdown. The 'Phone' section has fields for 'Phone', 'ext.', 'Phone Location' (set to 'Home'), and 'Phone Type' (set to 'Phone'). Below this are 'Add another Phone number' and 'Website' fields with an 'Add another website' link. The 'Website Type' is set to 'Home'. The 'Source' and 'External Id' fields are at the bottom. At the very bottom, there is a 'Browse/Upload Image' section with a 'Browse...' button and 'No file selected.' text, and a 'Check for Matching Contact(s)' button.

The "Check for Matching Contacts" button allows you to find any potential duplicates before adding a record.

Creating an individual Contact

In addition, while adding a name, PowerBase may automatically find a potential duplicate and show you a message like the following.



If the person you are entering is not a duplicate of any of those contacts, you can click the "x" in the top right corner of the message box to dismiss the message.

By clicking on one of the blue grey bars, you can expand that section to enter more details.

Fields with a red asterisk are required.