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.

Find	Contacts	A Ho	me	Search	Contacts	Contributions	Mailings	Events	Memberships	
	PowerBase Trai				New Individual New Organization			New Media Contact New Funder Contact		
	Recent Items Civio			New Activity New Email			w Elected (Official		
				Civi	Import Cor Import Activ	ntacts vities				
	🔓 fun 1@example.(org		🖋 Cor	New Group Manage Gr	o roups				
	CiviCRM Search Phone Number			Welc Yi 'd	New Tag Manage Tags (Categories) Find and Merge Duplicate Contacts			w of the data that's most in		
	Email address									

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:

Prefix First Name		Middle Name	Last N	lame	Suffix		
Current Employer 😯		Job Title	Nickna	ame	Contact Type		
	٩				- select -		
Email add	On Hold? 🕜	Bulk Mailings? 🕢					
Home		0					
Phone	Phone Location	Phone Type					
ext.	Home 💌	Phone 🔻					
Add another Phone number							
Website 😧	Website Type						
	Home 🗾						
Add another website		▶					
Source 😧	External Id 😯						
Browse/Upload Image ?							
Browse INO THE selected.							
Check for Matching Contact(s)							

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

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

🛕 Similar Contacts Found	x
If the person you were trying to add is listed below, click their name to view or edit their record:	
<u>Charles Jones</u> abc3@example.com <u>Gloria Jones</u> abc4@example.com <u>Richard Jones</u> abc39@example.com <u>Sharon Jones</u> abc76@example.com <u>Margaret Jones</u> abc221@example.com	

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.

Source ? Extern	nal Id ?	External Id ?	
Browse/Upload Image ?	Browse/Upload Im	Image ?	
Browse No file selected.	Browse	No file selected.	
Check for Matching Contact(s)	Check for Ma	atching Contact(s)	
Address Communication Preferences	Address Location Type H Use another of Street Address Addr1 Address Addr1 Address City Country United State Latitude, Longitu Override au	Home Primary location for this contact Billing location for this contact Delete this i contact's address? 2 2 2 2 2 2 2 2 2 2 2 2 2	address

Fields with a red asterisk are required.

Constituent Type * Potential Member Constituent Volunteer Board Member Activist Supporter Consultant Ally Elected Official Staff Intern Media Contact Funder

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