Create An Individual Contact

Management

View (/node/1088)

Edit (/node/1088/edit)

Track (/node/1088/track)

Convert (/node/1088/convert)

Submitted by Henry (/users/henry) on December 16, 2015 - 4:32pm 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:

 Contact Details 						
Prefix	Pirot Nome		Hiskle Name	Last Name	Suffix	
					-	
Current Employer 😣			Job Title	Nickname	Contact Type	
		P			- select -	• I
Druel add		On Hold?	Bulk Malings? ()			
Crivel add		Un note?				
	Home -		0			
 Sgnature 						
Phone		Phone Location	Phone Type			
	axt.	Home *	Phone •			
Add another Phone mu	rber					
Website 🕤		Website Type				
		Home •				
Add enother website						
			*			
Source 😡		External id 😡				
Browse/Uplaad Image	0					
Browse No fi	ile selected.					
Check for Matchin	on Contraction					
CINCK for Platchin	ing contract(s)					

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

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

Administration (/admin)



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.

Brow Br Che	rce ? Extern wse/Upload Image ? rowse No file selected. eck for Matching Contact(s)	nal Id 😧					
	Communication Preferences						
	Source External ld External ld Browse/Upload Image Browse No file selected. Check for Matching Contact(s)						
	Address Location Type Home Primary location for this contact Use another contact's address Street Address	Siling location for this contact	Delete this address				
	Addt'i Address 1 ? Addt'i Address 2 City Zip / Postal Code Suffix						
	Country State/Province United States Ohio Latitude, Longitude ? Override automatic geocoding ?	•					

Fields with a red asterisk are required.

Category:

Collecting and Managing Contact Information

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