

## Advanced Organizing Track

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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

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1. Scenarios: Break into small groups and plan your organizing strategy for the given scenario.
2. Measuring Engagement: Techniques for searching your database for the most engaged leaders.
3. Segmenting: Using advanced search techniques to filter your contacts to create useful groups.
4. Importing: Bring in new contacts easily and quickly via imports.
5. Online organizing: Build public web forms to collect data from new contacts and direct folks from your social networks.
6. Mobilize: Advanced techniques for sending email, including drip campaigns.

## Scenario 1: Healthy Food Campaign

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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

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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

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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 since January 1, 2010:  
\_\_\_\_\_
2. Find all contacts attending 10 more events of the type meeting:  
\_\_\_\_\_
3. Find all contacts in the FR 2011 group that have registered for at least 2 events..
4. Find all contacts in the "ORG Northside Neighbors" group that have attended at least one event since the beginning of 2013: \_\_\_\_\_
5. Find all contacts that participated in the "Lead poisoning Abatement" Campaign with an engagement level over 3: \_\_\_\_\_
6. Find all contacts with four or more scheduled activities: \_\_\_\_\_

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 4 of 41

## People with Valid Postal Addresses

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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 row. This row contains four dropdown menus: 'Contacts', 'Postal Code', 'Primary', and 'IS NOT NULL'. Below these dropdowns, there are two links: '» Another search field' and '» Also include contacts where'. At the bottom left of the criteria section is a 'Search' button.

## People with Valid Email Addresses

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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. This section contains several search fields and options: 'Complete OR Partial Name' (text input), 'Complete OR Partial Email' (text input with a yellow highlight showing '%@%'), 'Search Views' (dropdown menu showing 'Name Address Constituent type'), 'Display Results As' (dropdown menu showing 'Contacts'), 'Contact Type(s)' (dropdown menu showing '- select -'), 'Group(s) (search by group type)' (dropdown menu showing '- select -'), 'Search Operator' (dropdown menu showing 'AND'), 'Select Tag(s)' (dropdown menu showing '- select -'), 'All Tags' (text input), 'Phone Number' (text input), 'Phone Location' (dropdown menu showing '- any -'), 'Phone Type' (dropdown menu showing '- any -'), 'Exclude' (radio button), 'Include by Privacy Option(s)' (radio button), and 'Preferred Communication Method' (checkboxes for Phone, Email, Postal Mail, SMS, and Fax). A note at the bottom left states 'Punctuation and spaces are ignored.'

# Fundraisers Cheat Sheet for Creating Donor Smart Groups Page 5 of 41

## Donors who gave last year but not this year:

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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:

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FR SYBUNT Group

Search>Advanced Search

Custom Fields

# Fundraisers Cheat Sheet for Creating Donor Smart Groups Page 6 of 41

▼ Summary Fields

Total Lifetime Contributions	<input type="text" value="1"/>	To	<input type="text"/>
From			
Total Contributions this Year	<input type="text"/>	To	<input type="text" value="1"/>
From			
Total Contributions last Year	<input type="text"/>	To	<input type="text" value="1"/>
From			
Amount of last contribution	<input type="text"/>	To	<input type="text"/>
From			
Date of Last Contribution -	<input type="text"/>	(clear)	To <input type="text"/>
From			(clear)
Date of First Contribution -	<input type="text"/>	(clear)	To <input type="text"/>
From			(clear)
Largest Contribution From	<input type="text"/>	To	<input type="text"/>
Count of Contributions From	<input type="text"/>	To	<input type="text"/>
Average Annual (Calendar Year) Contribution From	<input type="text"/>	To	<input type="text"/>
Date of Last Membership Payment -	<input type="text"/>	(clear)	To <input type="text"/>
From			(clear)
Amount of Last Membership Payment	<input type="text"/>	To	<input type="text"/>
From			
Name of the last attended event	<input type="text"/>	To	<input type="text"/>
From			
Date of the last attended event -	<input type="text"/>	(clear)	To <input type="text"/>
From			(clear)

# Fundraisers Cheat Sheet for Creating Donor Smart Groups Page 7 of 41

To find who responded to a specific appeal method:

The screenshot displays a web-based filter interface for 'Contributions'. The form is organized into several sections with various input fields and checkboxes. At the bottom, a 'Contributions' dropdown menu is expanded, showing a list of appeal methods with 'Donor Responded To' selected and checked.

**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)

**Contributions**

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

# Fundraisers Cheat Sheet for Creating Donor Smart Groups Page 8 of 41

## This year's donors who could be asked again:

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**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

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**Smart Groups: Donors Prior Years**

Search>Advanced Search

Contributions Tab



# Fundraisers Cheat Sheet for Creating Donor Smart Groups Page 9 of 41

The screenshot shows a 'Contributions' search form with various filters. The 'Contribution Dates' section has a dropdown set to 'Prior to Previous Year'. The 'Contribution Amounts' section has 'From' and 'To' input fields. The 'Payment Method' is set to '- any -'. There are radio button options for 'Thank-you sent?', 'Receipt sent?', and 'Contribution is a Test?'. The 'Financial Type' is set to '- any -'. The 'In Honor Of' field is empty. The 'Personal Campaign Page' is set to '- any -'. The 'Currency' is set to '- any -'. The 'Campaigns' dropdown is set to '- select -'. On the right, there are checkboxes for 'Contribution Status' (Completed, Pending, Cancelled, Failed, Refunded), a 'Transaction ID' input field, and radio button options for 'Contribution is Pay Later?' and 'Contribution is Recurring?'. At the bottom right, there are dropdowns for 'Contribution Page' (set to '- any -') and 'Contribution Source', and a radio button for 'Personal Campaign Page Honor Roll?'.

Search>Search Builder

The screenshot shows the 'Search Builder' interface. Under the 'Search Criteria' section, there is a heading 'Include contacts where'. Below this, there are two identical rows of search criteria. Each row consists of a 'Contacts' dropdown, a 'Group(s)' input field, and an 'IN' dropdown. To the right of each row is a list of search results. The first row's results are: FR Donor Solicitors, FR Donors, FR Non Donors, and FR Donors 2011 (highlighted in blue). The second row's results are: 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)

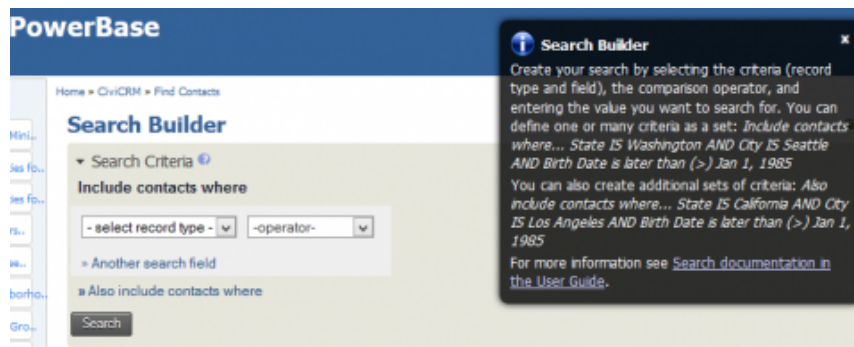
Submitted by Henry (/users/henry) on December 28, 2015 - 2:35pm

### 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

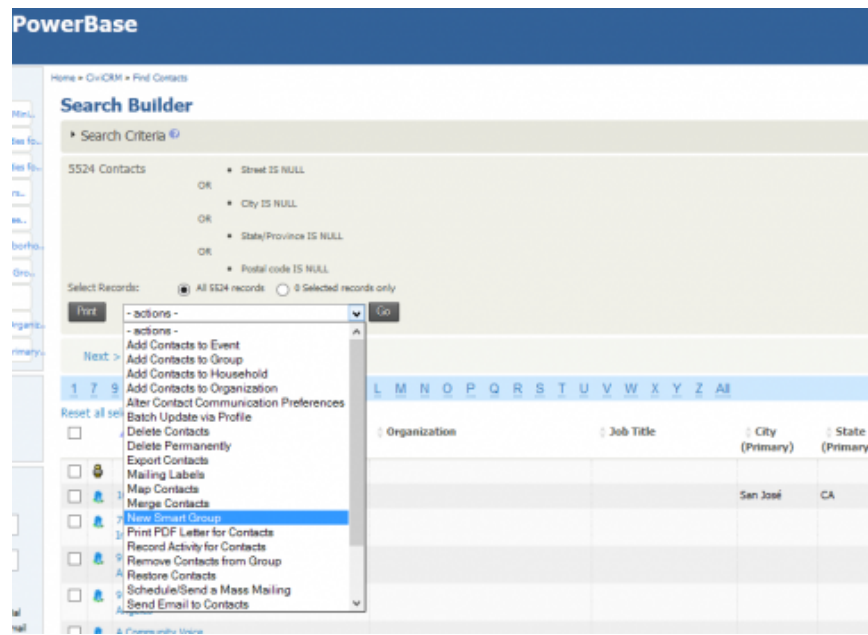
» Also include contacts where

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

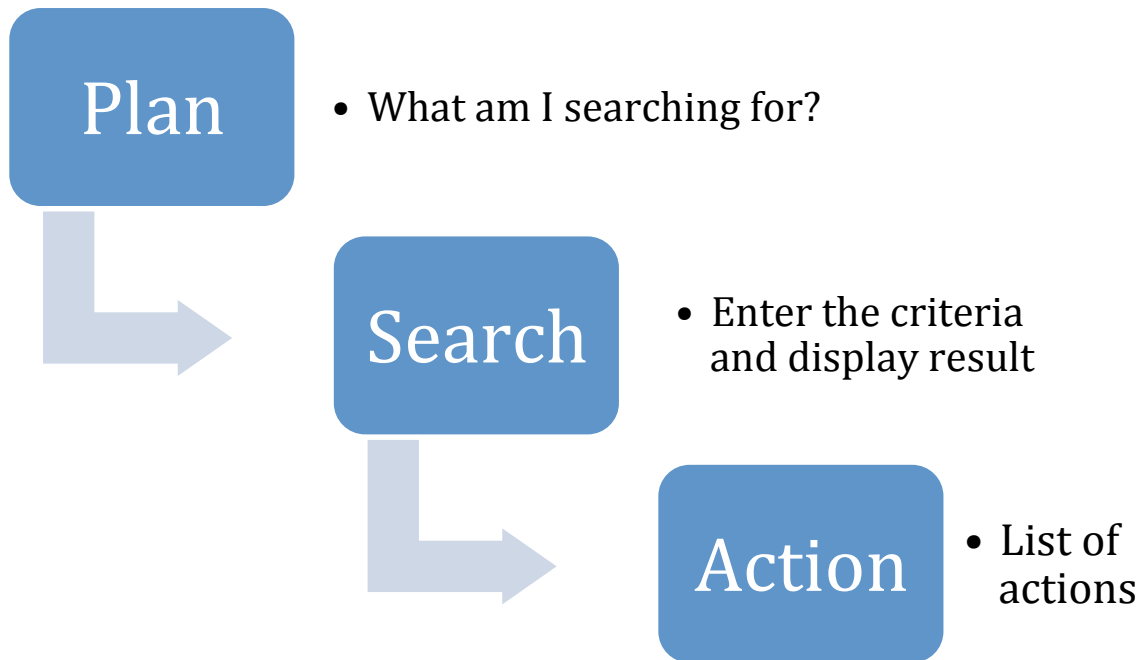
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## Tips on Advanced Search



### 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, revealing various search fields. Key elements highlighted with red circles include the 'Search Views' dropdown menu and the 'Display Results As' dropdown menu. 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 top navigation bar includes links for Home, Search, Contacts, Contributions, Mailings, Events, Memberships, Campaigns, Reports, Administer, Help, Data Entry, and Logout. The left sidebar shows 'Recent Items' with 'Mark Sherman' and 'Management' with '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', 'External ID', 'CMS User?', 'Preferred Communication Method', 'Job Title', and 'Preferred Language'. The 'Search Operator' is set to 'AND', and the 'Display Results As' dropdown is open, showing a list of categories: 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 for Member, Volunteer, Activist, Consultant, Elected Official, Intern (checked), Funder, Constituent, Board Member, Donor, Ally, Staff (checked), and Media Contact. A checkbox for 'Check to match ANY; uncheck to match ALL' is checked.
  - Other Name:** A text input field.
  - Staff Responsible:** A dropdown menu set to '-select-'.
  - Date Started - From:** A date picker field.
  - 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 for Immigrant Rights, Workers Rights, Lead Poisoning, Transportation Equity, Economic Justice, Environmental Justice, Computer Lab, and Parks. A checkbox for 'Check to match ANY; uncheck to match ALL' is checked.
  - Volunteer Interests:** A grid of checkboxes for Canvassing, Office/Admin, Event Support, Phone Banking, and Tabling. A checkbox for 'Check to match ANY; uncheck to match ALL' is checked.

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.

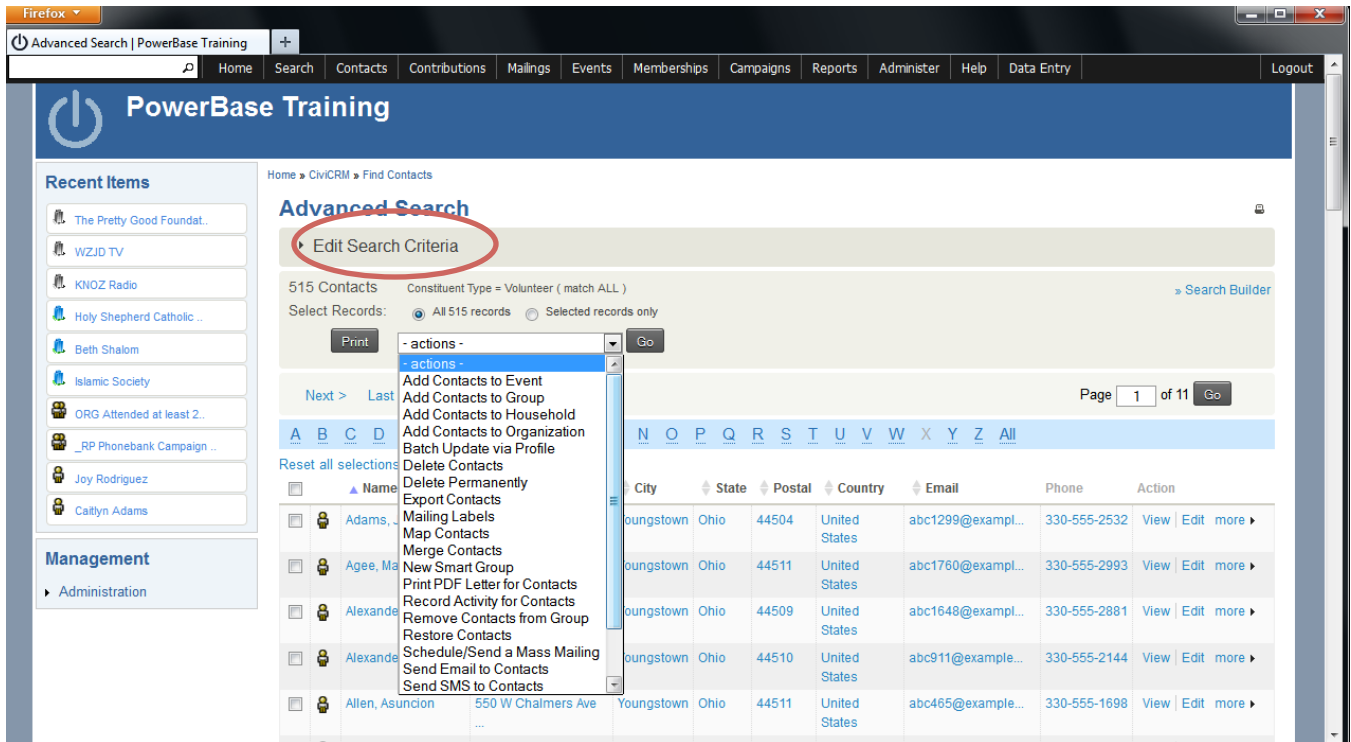
### Action

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 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 dropdown menu labeled '-actions-' which is circled in red. 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"

Firefox Advanced Search | PowerBase Training

Home Search Contacts Contributions Mailings Events Memberships Campaigns Reports Administer Help Data Entry Logout

**PowerBase Training**

Home » CivicRM » Find Contacts

**Advanced Search**

**Edit Search Criteria**

**Basic Criteria**

Complete OR Partial Name  Complete OR Partial Email  Search Views  **Display Results As  Event Participants** Search Search Reset Form

Contact Type(s)  Group(s)  Search Operator  ☐ Search in Trash (deleted contacts)

Select Tag(s)  All Tags

☒ Exclude ☐ Include by Privacy Option(s)  OR  Preferred Communication Method ☐ Phone ☐ Email ☐ Postal Mail ☐ SMS ☐ Fax ☐ Email On Hold

Contact Source  CMS User? ☐ Yes ☒ No (clear) Does the contact have a Drupal Account? Job Title

Contact ID  External ID  Preferred Language

Address Fields

Custom Fields

Communication Details

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

Firefox Advanced Search | PowerBase Training

Home Search Contacts Contributions Mailings Events Memberships Campaigns Reports Administer Help Data Entry Logout

**PowerBase Training**

Home » CivicRM » Find Contacts

**Advanced Search**

**Edit Search Criteria**

**881 Results - Event Participants** Constituent Type = Volunteer ( match ALL )

Select Records: ☒ All 881 records ☐ Selected records only

Print  - actions - Go

Next > Last >> Event 1 - 50 of 881 Page 1 of 18 Go

	Participant	Event	Fee Level	Amount	Registered	Event Date(s)	Status	Role	
<input type="checkbox"/>	Morley, Harold	2011 Event 1	(no fee)		January 4th, 2011	January 4th, 2011 - January 5th, 2011	Attended	Attendee	<a href="#">View</a>   <a href="#">Edit</a>   <a href="#">Delete</a>
<input type="checkbox"/>	Mccain, Katrina	2011 Event 1	(no fee)		January 4th, 2011	January 4th, 2011 - January 5th, 2011	No-show	Attendee	<a href="#">View</a>   <a href="#">Edit</a>   <a href="#">Delete</a>
<input type="checkbox"/>	Murphy, Mary	2011 Event 1	(no fee)		January 4th, 2011	January 4th, 2011 - January 5th, 2011	Attended	Attendee	<a href="#">View</a>   <a href="#">Edit</a>   <a href="#">Delete</a>
<input type="checkbox"/>	Mitulinski, Thomas	2011 Event 1	(no fee)		January 4th, 2011	January 4th, 2011 - January 5th, 2011	Attended	Attendee	<a href="#">View</a>   <a href="#">Edit</a>   <a href="#">Delete</a>
<input type="checkbox"/>	Robinson, Mildred	2011 Event 1	(no fee)		January 4th, 2011	January 4th, 2011 - January 5th, 2011	Attended	Attendee	<a href="#">View</a>   <a href="#">Edit</a>   <a href="#">Delete</a>
<input type="checkbox"/>	Dixon, William	2011 Event 1	(no fee)		January 4th, 2011	January 4th, 2011 - January 5th, 2011	Attended	Attendee	<a href="#">View</a>   <a href="#">Edit</a>   <a href="#">Delete</a>

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

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

Collecting and Managing Contact Information

116 reads

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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"

### Category:

Collecting and Managing Contact Information

2 reads



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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  ?

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

Dedupe Rule  ?

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.

√1. Choose Data Source    »2. Match Fields    3. Preview    4. Summary

**Match Fields (step 2 of 4)**

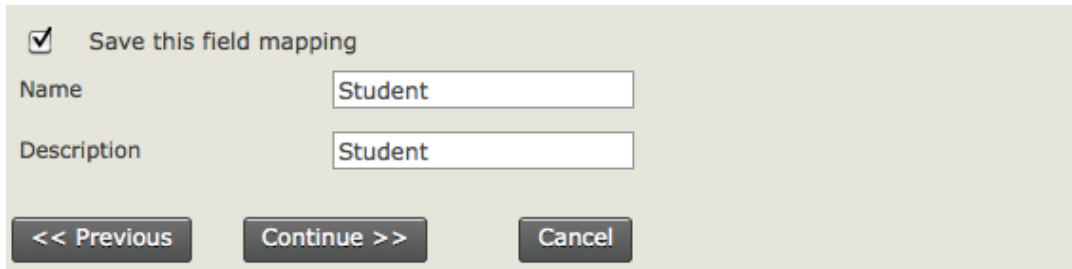
Column Names	Import Data (row 1)	Import Data (row 2)	Matching CiviCRM Field
Title	MS	Mr	<input type="text" value="Individual Prefix"/>
First Name	Paula	Peter	<input type="text" value="First Name *"/>
Middle Name	A	William	<input type="text" value="Middle Name"/>
Last Name	Smarts	Smarts	<input type="text"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

Home

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). <a href="#">» Download Errors</a>
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.

Home » CivCRM » Administer CivCRM

### Profiles

CivCRM Profile(s) allow you to aggregate groups of fields and include them in your site as input forms, contact display pages, and search and listings features. They provide a powerful set of tools for you to collect information from constituents and selectively share contact information. [?](#)

[Add Profile](#)

**User-defined Profiles** [Reserved Profiles](#)

Profile Title	Type	ID	Used For	Fields	Settings	more
Name and Address	Individual, Contact	1	Standalone Form or Directory, CivEvent, Search Views, View/Edit Drupal User Account, CivEvent_Additional	<a href="#">Fields</a>	<a href="#">Settings</a>	<a href="#">more</a>
Update Contact Information	Individual, Contact	3	Standalone Form or Directory, CivEvent, CivEvent_Additional	<a href="#">Fields</a>	<a href="#">Settings</a>	<a href="#">more</a>
Update Grassroots Info	Individual, Contact	4	Standalone Form or Directory	<a href="#">Fields</a>	<a href="#">Settings</a>	<a href="#">more</a>
Participant Dietary & Lodging Info	Participant	5	Standalone Form or Directory, CivEvent, CivEvent_Additional	<a href="#">Fields</a>	<a href="#">Settings</a>	<a href="#">more</a>

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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