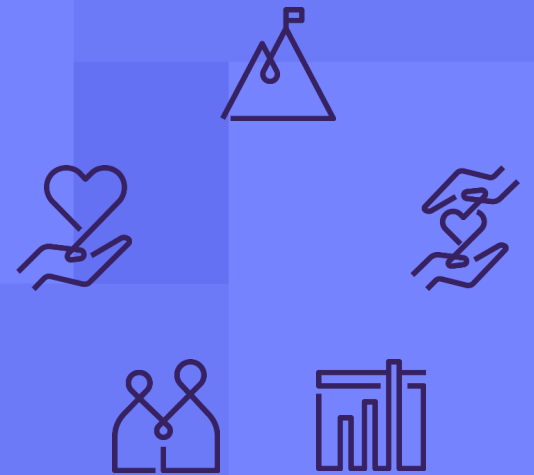


DONOR ENGAGEMENT

Volunteering In EveryAction



Meet your Trainer...

Ryan Sauve

Training Specialist

Donor Engagement

EveryAction



Agenda

1. Organizing your Volunteers
 1. Why Volunteer IDs are Important
2. Volunteering Actions
 1. Events
 2. Phone Banking
3. The Volunteer Management Dashboard
4. Engagement Points



Creating Your Volunteers

Understanding the ActionID

Some organizations can create and edit their own **User Profiles (roles)** and will be able to define customized permission sets that will allow staff the right amount of access while limiting the changes they can make.

In this case, you will see the option "**User Profiles**" listed under your **Administrative Menu** or from the **Sidebar**.

For more information on **User Profiles in EveryAction**, please see our help documentation listed in the reference section of this webinar.

Administrative Menu

Settings and Preferences

State Updates

Mail Merge Templates

➤ Reports • Forms • Labels

➤ MiniVAN

➤ Exports

➤ Letters

➤ Phone Services

▼ Users • Committees

Users

Canvasser and User Look Up

User Profiles

User Profile Comparison

Understanding Users and Roles

In EveryAction, each User is assigned a User Profile, which determines their access to features and types of data. User Profiles represent a certain level of access and are named based on the packages.

- Admin level User Profiles have access to all offered features in the packages their Committee has purchased and can create other Users.
- Manager level User Profiles have access to all offered features in the packages their Committee has purchased but CAN NOT create other Users.
- Staff level User Profiles are intended for low-to-mid level department-specific staff, and typically do not need access to some Committee specific tools.
- Intern level User Profiles perform basic tasks like looking up contact records, viewing Events, and create lists and searches.

Creating a User Account

- To create a new User, start by opening the Users list page by searching for Users in the Sidebar or Main Menu > Users * Committees > Users.
- Select **Add New User** and enter the **Contact Information** and **Committee** for your new user.
- Select an Account Name and then select a User Profile or User Role. If necessary, set an expiration date. The Assign Access option will also appear for state-based databases.

USERS

Add New User

Contact Information

First Name* Last Name*

Jane Good

Email Address*

email@address.com

A welcome email will be sent to your new user to join your selected committee. After confirming their email address, they'll create or login with their own ActionID account. [What's ActionID?](#)

Do not send this user a welcome email

Send a copy of this email to yourself

User Details

Committee*

People for Good

Suggested Account Names

email

PeopleforGoodemail

emailPeopleforGood

Custom Account Name...

User Profile*

Activate this user account at a later date?

Expire this account after a set amount of time

Welcome Email

- New users will automatically receive a Welcome email unless you selected ***“Do not send this user a welcome email.”***
- The invitation will contain the **Committee** name and the site name, as well as the URL to use for login going forward.
- The invite expires after 48 hours.



You've been invited to join Baughman for Massachusetts on VoteBuilder Massachusetts

To join, click the link below. This link will expire in 48 hours

Accept Invitation

To easily log in later, save this URL:

<https://votebuilder.com>

Why Volunteer IDs Are Important

Volunteer Accounts

While we understand that your organization may have many volunteers who assist you, it is paramount that you do not create centralized "blanket" accounts for volunteer users, but to rather give each volunteer their own ID. Individual accounts will give you greater:

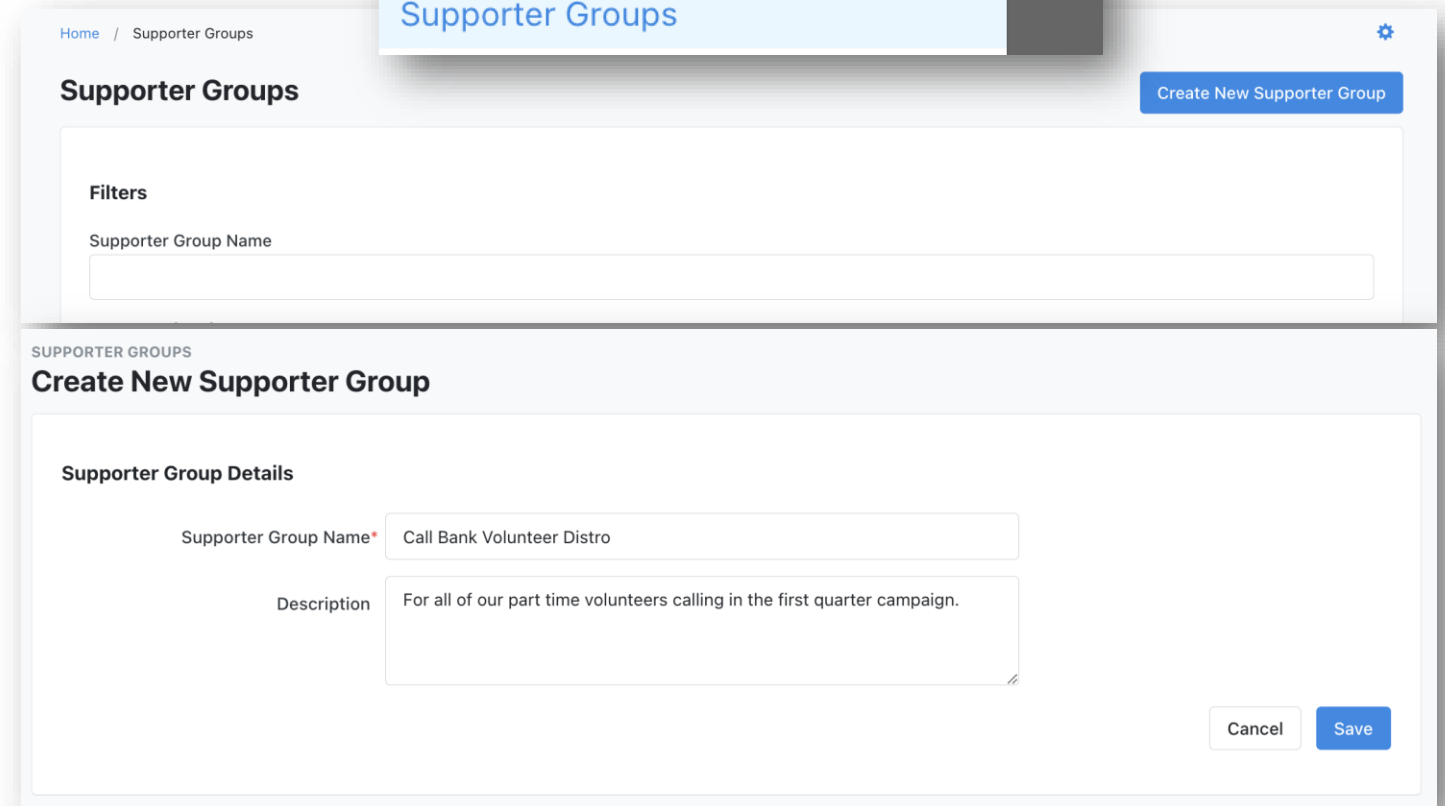
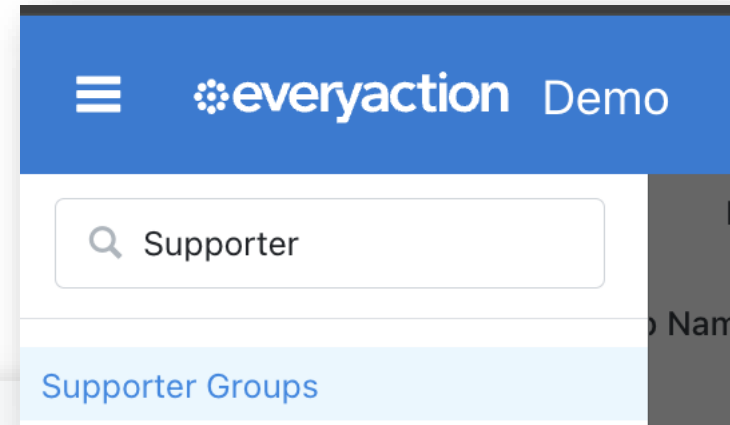
- **Transparency:** If someone makes a mistake when entering data, editing a contact record, or while doing anything else in the database, it is easier to identify which person performed that task if your users are not sharing accounts. It will also make it easier to resolve the issue, such as wiping inaccurate data from contact records.
- **Ease:** Volunteers who are doing phone banking and canvassing can simply create their own ActionID and then canvass with MiniVAN and make calls via Open Virtual Phone Bank.
- **Security:** Should any volunteer appear to be doing anything dubious or submitting fake data, it is easier to identify that person and shut down or limit their access if each person has their own user account.

Supporter Groups for Volunteer Organization

Keeping Volunteers Together

The use of **Supporter Groups** can allow volunteer accounts to be bundled together for easier management of functions and access.

Supporter Groups can be assigned specific names and descriptions through the creation process, and once completed, members can be added to these groups for later use.



Adding Members to Groups

Once created, members can either be individually added to these groups if they have an existing Contact record within EveryAction directly from the Supporter Groups screen, or through a Bulk Apply/Upload.

The image shows two overlapping screenshots from the EveryAction interface. The background screenshot is the 'Members' section of a Supporter Group, featuring a search bar and a table of members. The foreground screenshot is the 'BULK APPLY Your List' dialog box, which includes a warning message, an 'Edits' section with a dropdown menu, and a table for selecting edit types. A modal window titled 'Apply Supporter Groups' is also visible, showing a dropdown for 'Supporter Group' and a 'Next' button.

Members

Search for existing Contacts to add as Members of this Supporter Group

Add a New Contact

Please enter 3 more characters

	ted Event	Last Completed Event Date	# of Events Complete
<input type="checkbox"/>	Mays, Carla	8/2/24	0
<input type="checkbox"/>	Cheek, Charles	8/2/24	0
<input type="checkbox"/>	Armwood, Creshona	8/2/24	0
<input type="checkbox"/>	Banks, Yetta	8/2/24	0

BULK APPLY Your List

Mappings must be applied to one or more records before finishing the Bulk Apply.

Edits

Select the edits that you would like to bulk apply to the contact records from your list, then click **Finish**.

--Apply New Mapping--

Edit Type	Record's Column	Applied Value
-----------	-----------------	---------------

Apply Supporter Groups

Supporter Group* Apply One Value to All Records

Next

Volunteering Actions

Enabling Volunteers

Within EveryAction, there are 2 main functions wherein volunteering is leveraged:

- Event Shifts
- Virtual Phone Bank

As our main focuses are centered around these two facets, we'll dive a bit deeper into using the Volunteering tool to track how well your volunteers are performing and how much time they're able to dedicate to assisting your organization.



Event Based Volunteering

Volunteering Event Flow

At the outset, there is no way for volunteers to indicate themselves as such in EveryAction.

While you may have an established list of contacts who wish to be considered as such, for those who wish to contacts self-identify as wanting to actively volunteer with your organization, this process flow is key in enabling your supporters.

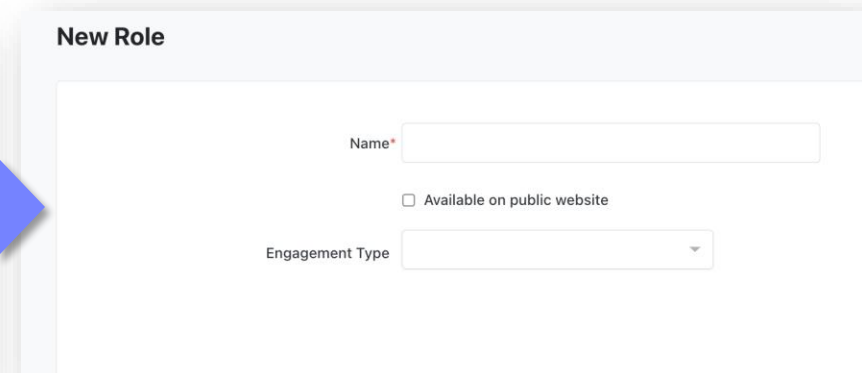
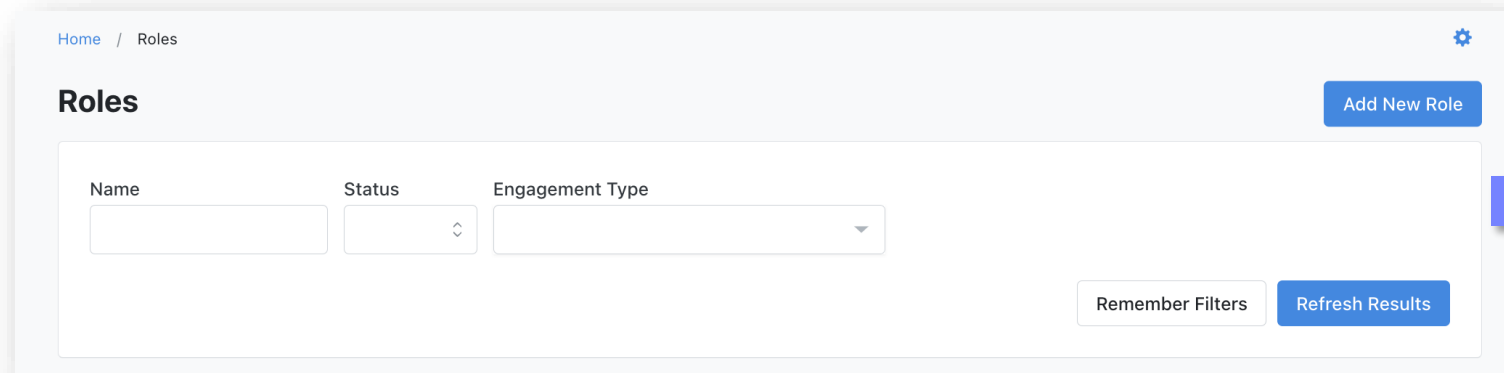
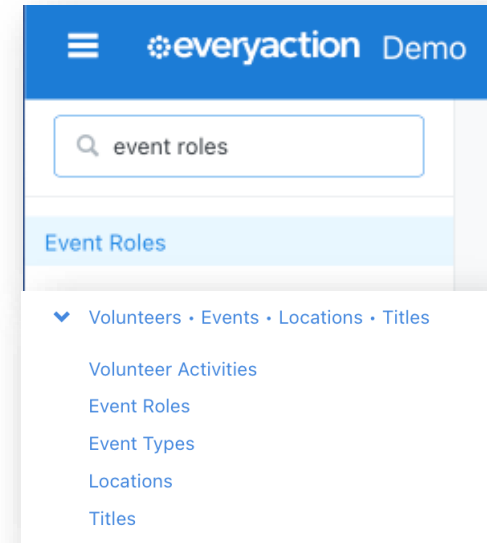
We'll cover each step of the process moving forward.



Creating Volunteer Event Roles

You must first establish an Event Role specific to Volunteers, which can be done by using the **Search for a Page** option at the left of the screen, or by heading to the **Administrative Menu > Volunteers-Events-Locations-Titles** and selecting **Event Roles**.

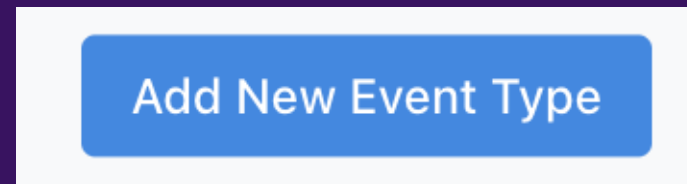
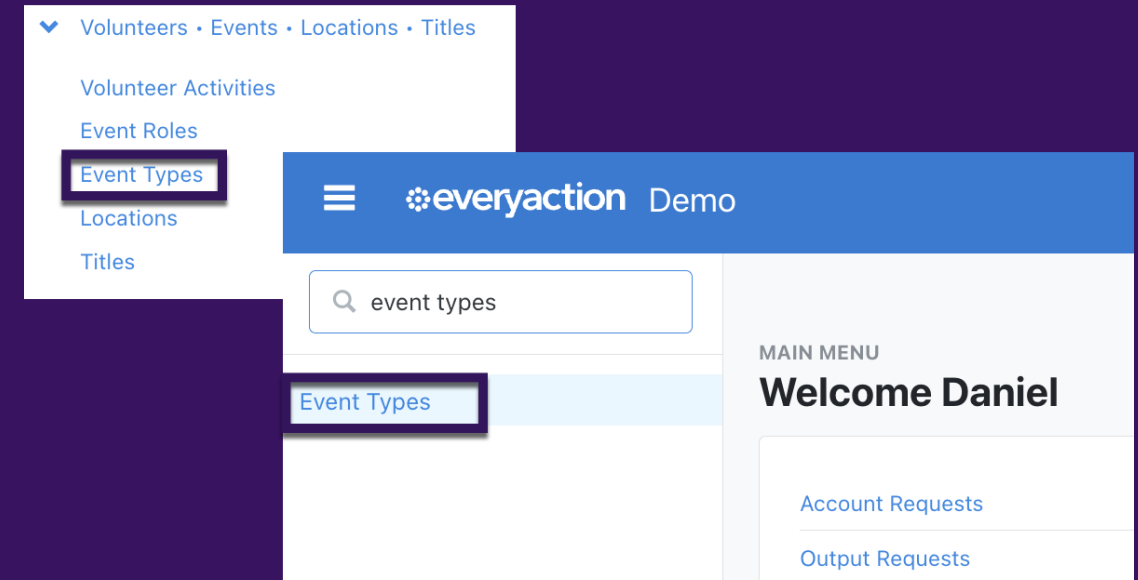
Then, choose to **Add New Role**. As the intent of this process is to publish this online to gain new Volunteers, it is recommended to check the “Available on Public Website” checkbox.



Creating Event Types

As EA does not have a natively available Volunteering type of event, we'll first need to establish this. From your **Search for a Page** menu, or from the **Administrative Menu > Volunteers-Events-Locations-Titles**, choose the **Event Types** option.

Once in the Event Types screen, choose to **Add New Event Type** at the top right of the screen.



Adding New Event Types

When adding a new Event Type, we're given setup options regarding the details of the Event itself.


The main focuses in this flow will be to establish:

- A type name.
- Whether the event will have multiple shifts, as well as if it will be recurring.
- If this should be available to publish as an Online Action.
- What Roles are linked to this Event Type.

Add New Event Type

Name/Type Roles Statuses Locations

Name*

Color 

Can be multi-shift event

Can be repeating event

Display archived info

Available on public websites

Can be available for Online Actions

Status* Active Inactive

Roles in Events

When setting roles for a new Event Type, it is extremely important to ensure that our Volunteer role is selected as “**Can Include**”, and “**Is Available for Online Actions**”, as this will be integral to allowing interested parties to register themselves as volunteers online. If this event type is to have a maximum limit of volunteers, we can choose to set that by checking the **Maximum Capacity** box as well.

Edit Event Type

Name/Type Roles Statuses Locations

Set minimum requirements for some roles

Set maximum capacity for some roles

Set goals for some roles

Available Roles	Can Include	Is Available for Online Actions ?	Is Event Lead
Role	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Attendee	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Canvasser	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Data Entry	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Dog Walker	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Host	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Host Committee Member	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Organizer	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Phonebanker	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Ticket Purchaser	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Volunteer	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

Prev Next Finish

Statuses and Locations for New Event Types

Event Type Statuses are meant to define what status can a prospective registrant have. In most cases, we would see examples of:

- Confirmed
- Completed
- No Show
- Sched-Web (Indicating they registered online)

However, you are not limited to only these statuses if your registration process or statuses are more complex.

Event Locations are only meant to dictate the *default* expected physical location of the event. By choosing a location from this screen, this does not lock the location for when a new event of this type is created.

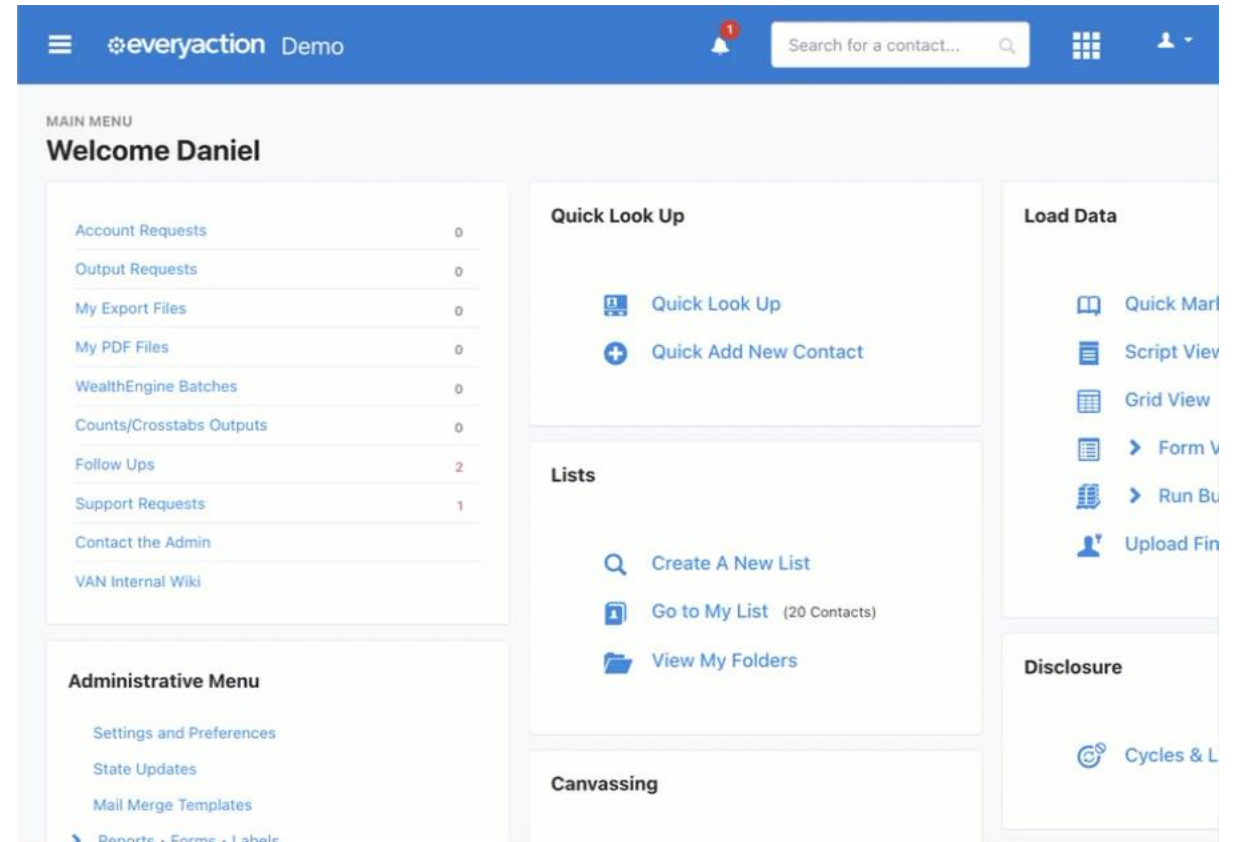
Creating Form Templates in Online Actions

“Free” events are unique in that they’re the only type of true *template* that can be created through Online Actions.

To create these, access **Online Actions**, and **choose the Templates tab**. Choose to *Create New Form Template* and select **Event Signup**.

The process for creating Form Templates is nearly identical to the process for creating any other form in OA, with the exception of the following fields included in the Build Page step:

- Event Information
- Terms



The screenshot displays the 'everyaction Demo' interface. At the top, there is a blue header with a search bar containing 'Search for a contact...', a notification bell with a red '1', and a user profile icon. Below the header, the 'MAIN MENU' section is titled 'Welcome Daniel'. It features a list of items with counts: Account Requests (0), Output Requests (0), My Export Files (0), My PDF Files (0), WealthEngine Batches (0), Counts/Crosstabs Outputs (0), Follow Ups (2), Support Requests (1), Contact the Admin, and VAN Internal Wiki. To the right, there are three main panels: 'Quick Look Up' with 'Quick Look Up' and 'Quick Add New Contact' buttons; 'Lists' with 'Create A New List', 'Go to My List (20 Contacts)', and 'View My Folders' buttons; and 'Load Data' with 'Quick Mar...', 'Script View', 'Grid View', 'Form V', 'Run Bu', and 'Upload Fin' buttons. At the bottom, there is an 'Administrative Menu' with 'Settings and Preferences', 'State Updates', 'Mail Merge Templates', and 'Reports • Forms • Labels'. A 'Canvassing' section is also visible at the bottom. On the far right, a 'Disclosure' section includes a 'Cycles & L' button.

Creating the Volunteer Event

Now that a template has been established for Event Signups, the Event List in the CRM must be accessed to establish a new event to track registrations.

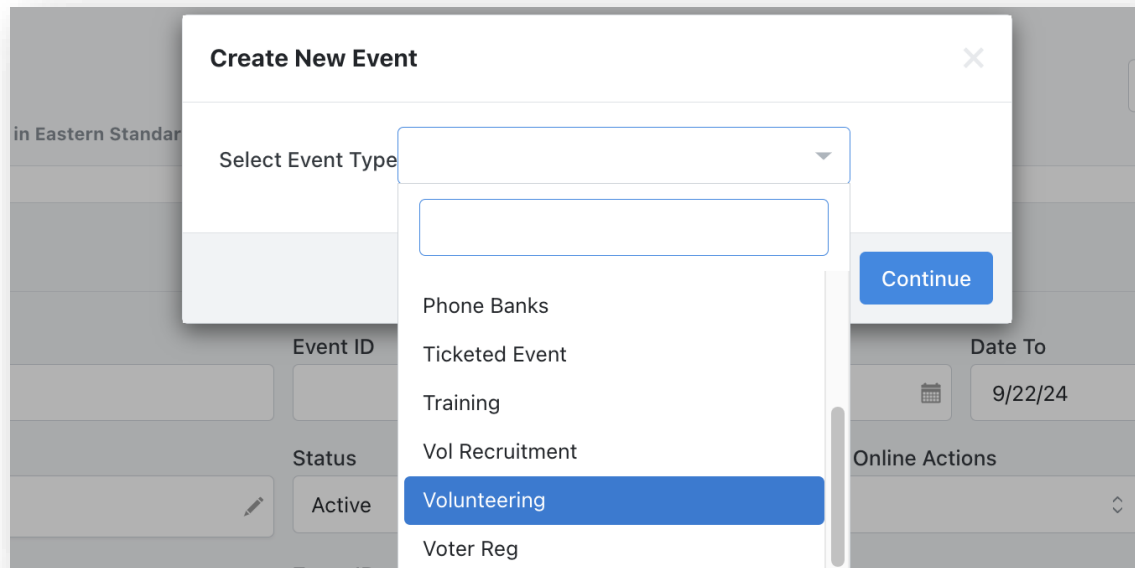
From the EveryAction main menu, you may either **Search for a Page** and enter **Event List** or navigate to the bottom right of your main menu to the Events section, and click **Event List**, then choose to **Add New Event** at the top right of the page.



Event Creation Workflow

Name

When selecting an Event Type, use the newly created "Volunteering" category.



The screenshot shows a 'Create New Event' modal window. At the top, there is a 'Select Event Type' dropdown menu. The dropdown is open, displaying a list of event categories: 'Phone Banks', 'Ticketed Event', 'Training', 'Vol Recruitment', 'Volunteering' (which is highlighted in blue), and 'Voter Reg'. To the right of the dropdown list is a blue 'Continue' button. In the background, parts of the event creation form are visible, including fields for 'Event ID', 'Date To' (set to 9/22/24), 'Status' (set to Active), and 'Online Actions'.

Within the Event Details, set your default information for the event itself as needed, but now that an Event Signup template has been created, we can also link this event to a public-facing signup form.

Online Signup Form

Collect signups for this event online by publishing an event form in Online Actions. The form will be published based on the specified template upon clicking Finish. If this event repeats, one form per occurrence will be published.

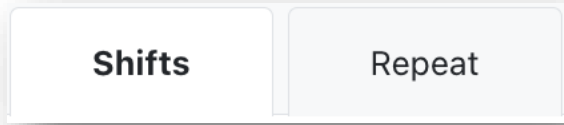
Publish Online Signup Form(s)

Event Signup Form Template: Volunteering Events Default

Public-Facing Name [?]*: Specify the event name shown on the published form

Public-Facing Description [?]: Describe your event to supporters. This will appear on published event signup forms.

Event Creation Workflow



If your Event contains multiple shifts wherein the volunteers can work, we can establish up to 9 separate shift windows in this step. This step is integral in reporting time worked for your volunteers.

Number of Shifts* 4

Shift Name	Start Time	End Time	Total Shift Time
Shift 1			
Shift 2			
Shift 3			
Shift 4			

The Repeat tab will allow for the event to recur at regular intervals, whether those are daily, weekly, or monthly.

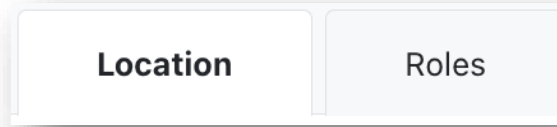
Repeat* Never Daily Weekly Monthly

Every 1 week(s) on

Sunday Monday Tuesday Wednesday Thursday Friday Saturday

End After mm/dd/yyyy After occurrences

Event Creation Workflow



Location allows your Event to be set at a specific physical or digital location. This setting is important as it will directly tie to the use of the Event Detail-adjacent Merge Fields for your Online Actions and outbound communications regarding the Event.

Roles will directly tie into the selections made during the creation of this Event Type and represent what Roles a supporter may register themselves as when submitting a form online.

Add Locations

Remove Locations

LocationID

Location Name

998

Teams

Roles

Selected event roles marked as "Available for Online Actions" will be shown to supporters if an event signup form is published for this event.

Uncheck All

Goal

Volunteer
(Available for Online Actions)



Event Creation Workflow

Sharing

The final step in the Event Creation process will be to enable/disable specific sharing settings. These include the ability to allow the event to be edited by only you or other admins within your committee, if the page can be published on public sites, and finally if the event should be shared across committees for those organizations that have satellite or central committee links.

Editable* Other users can edit this event.
 Only I can edit this event

Publishing options* Publish on public website
 Not published on public website

Committee Access

With Access	Without Access
National Association of Dog Owners (Demo)	

Reporting on Volunteered Time

The culmination of the efforts put forth in creating our own custom Volunteer Event Type or by including the Volunteer role in Events will show through in reporting on time logged. This can be shown by running the **Event Participant Report** for raw data on who has registered, under what shift, date, and their hours completed.

Event Participant Report

View event signups and attendance.

Export As... ▾ Report Actions ▾

Applied Filters | [Edit Filters](#)

Contact Records: All Contacts Event Type: Volunteering ✕

Report Summary

First Shift Start	Last Shift End	Number of Events	Number of Signups	Hours Completed	Number of Individuals
8/25/24 8:30 AM	8/25/24 8:00 PM	1	2	16	2

Group By ▾

[Edit Columns](#)

VANID	Contact Name	Signup Date	Status	Role	Event Name	Event Type	Event Date	Hours Completed	Shift Start Time	Shift End Time	Location Name	Recruited By	Assigned Staff
112389414	Logan, Virginia	8/20/24	Completed	Volunteer	Volunteer Event Weekly	Volunteering	8/25/24	8.0	12:00 PM	8:00 PM	Teams		Alexander, AJ
112389714	Thompson, Lenora	8/20/24	Completed	Volunteer	Volunteer Event Weekly	Volunteering	8/25/24	8.0	8:30 AM	4:30 PM	Teams	Mathias, Daniel	Alexander, AJ

Phone Bank Volunteering

The Call is Coming from Inside the System

While EveryAction's calling system does support external access through [OpenVPB](#), allowing Volunteers to be added to your user base via an assigned ActionID is a secondary option for call banking through local or loyal Volunteers.

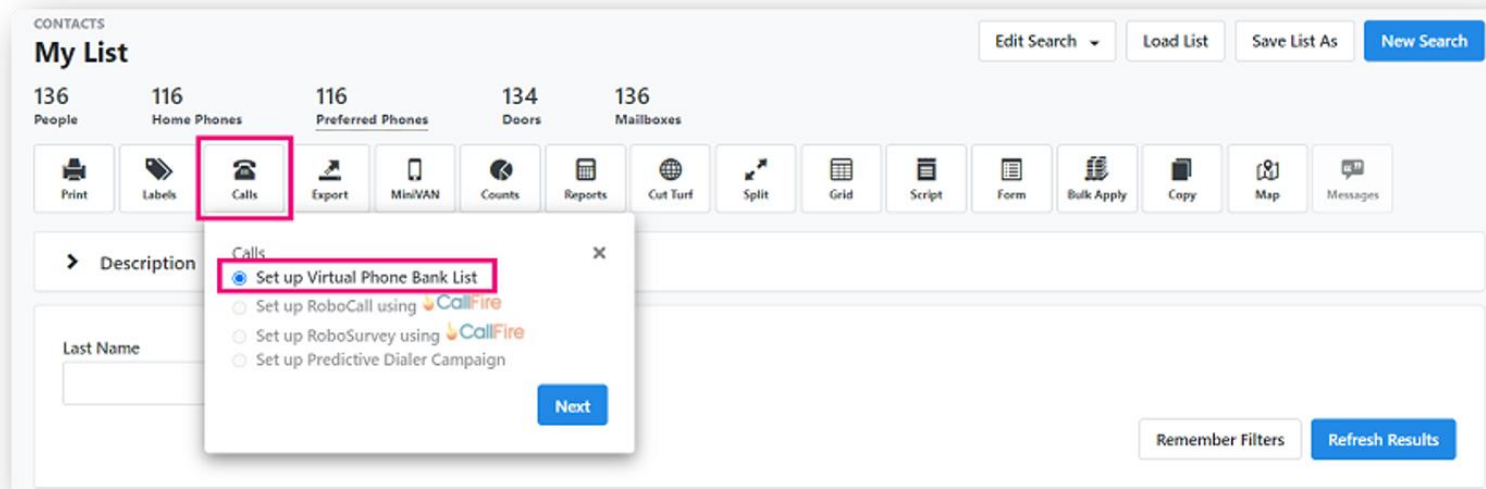
While the main overviews of creating [Scripts](#) and Calling Campaigns are covered in more detail through the training section on Phone Banking, this section will cover the basic steps needed and what it looks like for a Volunteer to engage with a calling campaign directly through the EveryAction interface.



Configuring your scripts & lists

Within EveryAction, we can access **Scripts** from the Search for a Page menu to create linear or branched text and questions for your volunteers to use guidelines for your outreach efforts. This will also allow for assignment of **what data volunteers can access or change during a call, through the “Display Settings” in Script setup.**

A list must then be created to narrow down who will be called. This can be done through Create-A-List, and by choosing the **Calls** button as shown below, or by simply saving your list.



ADMIN SETTINGS

Edit Script VPB Demo 1

Script Details

Name ^{*} ⓘ VPB Demo 1

Description



Status Active Archived Inactive

Owner Committee National Association of Dog Owners (Demo) ▾

Campaign ▾

Created By Daniel Mathias, National Association of Dog Owners (Demo) (4/4/24)

Script Type

- Script Type  Linear
Linear scripts offer the format of stacked elements with no conditional statements.
-  Branched
Branched scripts are reserved for **Open Virtual Phone Bank and MiniVAN use only**. Create multiple script paths for your canvassers.

Linear Script Preview


No Script Elements




Add script elements from the available options below. Your script preview will be shown here.

VPB: The Volunteer Experience

For those volunteers that are making calls, the typical process would be:

- Logging into EveryAction using their ActionID
- Accessing the **Virtual Phone Bank** module, either from Quick Tasks or the Search for a Page menu.
- Once within the Phone Bank, Volunteers will either enter a specific VPB Code or select a list saved and assigned to the specific Volunteer.
- The Volunteer will also be asked to enter their ZIP Code.

Quick Tasks

-  Manage Relationships
-  Virtual Phone Bank
-  ReactVPB

 virtual

Virtual Phone Bank

PHONE SERVICES

Virtual Phone Bank

Which Virtual Phone Bank do you want to use?

Let me select by VPB Code

E585C5C - 124195

Next

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You are currently impersonating AJ Alexander [Click here to return to yourself](#)

The Phone Bank Layout

Based on the settings defined when creating the phone bank, callers will be shown the details of Contacts included in the list of reachable phones.

The script linked to the Phone Bank will be displayed at the left of the screen for the caller to follow, along with the potential to link call recipients to events, activist codes, as well as survey responses.

Home / Virtual Phone Bank

VIRTUAL PHONE BANK

Membership Outreach Pre-Registration Skip Save & Next Call

Phone Bank Progress (2/158)

Danielle Bowers **(717) 571-6253**
VANID: 112389185
I Couldn't Reach Danielle

Additional Info

Joe Caller
(412) 888-8988
joecaller@callplace.com

Script

Hey, thanks for picking up today, how are you [name]?

We'd like to inform you of our newly formed membership program, would you be interested in more details?

DL - Iron

Would you be interested in having benefits such as being included in our regular circulation? Ad space?

Additional Info

Home City, Harrisburg, PA 17104
State, Zip

Home Street
Address

Preferred (717) 571-6253
Phone

Name • Salutation

Viewing Results

Monitor your progress and measure the effectiveness of your phone outreach using these reports:

- Phone Contact History Report
- Phone Number Report
- Survey Response Report
- Virtual Phone Bank Report
- Canvass Results Report

While Canvass Results Reports are not specific to phone campaigns, you can use the report filters to narrow results to phone outreach or survey responses.

The screenshot displays the 'Report Manager' interface. At the top, it says 'REPORTS Report Manager'. Below this is a blue banner with an information icon and the text: 'To run a Contacts Report, use [Create a New List](#) and [My List](#) to view and filter contact records.' The main area is divided into two columns. The left column is a sidebar with a list of report categories, each with an icon and a count in a grey circle. The 'Canvass Results' category is highlighted with a red box. The right column shows the 'Canvass Results' section, which includes a search bar and a list of report titles with brief descriptions. A red box highlights this list of reports.

Report Name	Count
Default Report Templates	78
All Saved Report Templates	27
My Saved Report Templates	0
Scheduled Reports	4
Data Integrity PDF Reports	10
Canned Reports	5
Fundraising Analysis Reports	4
Counts and Crosstabs	3
Canvass Results	5
PDF Report Builder	2
Call Sheets	1
Export Formats	1

Canvass Results
Canvass results and summary reports

Search

Report Name

- [Contacting Summary](#)
View all contact results activity by team or political jurisdiction
- [Survey Question Summary](#)
Select a survey question and view results by team or political jurisdiction
- [Contact Results by Hour of the Day](#)
View contact results by hour of the day
- [Contact Results by Day of the Week](#)
View contact results by Day of the Week
- [Contact Results by Day and Hour](#)
View contact results by Day and Hour

The Volunteer Management Dashboard

Dashboard Overview

Active Volunteers are contacts who have completed at least one shift in the last 30 days.

Hot Leads are contacts added in the last 7 days but who have not signed up for an even shift in the last 30 days.

Lapsed Volunteers is a list of previously active volunteers who have not completed a shift in the last 30 days.

Selecting one of these will give you a description of the search, as well as, the option to Load to My List, Create a Virtual Phone Bank, and Run Event Participant Report.

The Track Activity Card:

- Event Shifts will predefine reports to be pulled in the Event Participant Reports

- Contact History will send users to the Contact History Report for the selected time frame.

Enter Data allows users to Bulk Upload, Quick Mark, or generate lists in Form or Grid View.

Visualize Data will bring users to the Analytics Dashboard

VOLUNTEER MANAGEMENT
Welcome AJ
Main Menu | Quick Look Up | My List | View My Folders | My PDF Files (0) | My Export Files (0) | Manage Users | Volunteer Management Settings | Quick Add Contact

Recruit Volunteers
Engage with your volunteers by using existing lists of contacts or create your own custom lists.

- Active Volunteers ▾
- Lapsed Volunteers ▾
- Hot Leads ▾

Create A List
Load a List
My List (0 People)

Track Activity
View the latest activity and performance of your efforts by running default and custom reports.

- Event Shifts ▾
- Contact History ▾
- View All Reports

Enter Data ▾
Commit MiniVAN Data
Visualize Data

Phone Banks
Create New | Join a Phone Bank | View All
1 Total Calls
Assigned to Me
No Assigned Phone Banks

Events
Create New | View All | Open Shifts (0)
Past | Today | Upcoming
No events today
Followed and auto-followed events that occur today will appear here.

Recent Contacts
Quick Look Up
No Recent Contacts Yet
Looking for someone?
Find a Contact

The Phone Bank Card


When a Volunteer is assigned to a Phone Bank, the user will be available to review their progress on those phone banking efforts.

Depending on the degree of permissions assigned to the Volunteer, they may also have the ability to join additional created Phone Banks in your list, as well as to create new Phone Banks directly from this card.

Phone Banks
[Create New](#) | [Join a Phone Bank](#) | [View All](#)

1
Total Calls

Assigned to Me

 [Membership Outreach Pre-Registration](#) 1%

The screenshot shows a user interface for managing phone banks. At the top, there's a title 'Phone Banks' with three links: 'Create New', 'Join a Phone Bank', and 'View All'. Below this, a large number '1' is displayed above the text 'Total Calls'. Underneath, there's a section titled 'Assigned to Me' which contains a single entry: 'Membership Outreach Pre-Registration' with a phone icon and a progress indicator showing '1%'.

The Events Card

From the Events card, Volunteers can view any followed events or any Events that they've created and auto-followed.

This card will only show anything occurring in the last 7 days in the past or up to 7 days in the future.

Clicking on any eligible Events will enable the Volunteer to manage attendees or any other facets of the event their permission level may allow.

The screenshot displays the 'Events' section of a user interface. At the top, there is a title 'Events' followed by three links: 'Create New', 'View All', and 'Open Shifts (0)'. Below this, there are three tabs: 'Past', 'Today', and 'Upcoming'. The 'Today' tab is currently selected and underlined. Under the 'Today' tab, there is a calendar view for 'Aug 27' showing a single event: 'Shelter Crew Cleanup - Aug...' with a time range of '12:00 AM - 11:30 PM'. To the right of the event, there are three status indicators: '0 Scheduled', '0 Confirmed', and '0 Completed'.

Engagement Points

Tracking Those Who Support You Most

Engagement points should be considered the most passive way to determine who, of your engaged Contacts, interacts with your organization the most.

In that sense, Engagement Points proactively apply based on your supporter's actions in a variety of Engagement Types such as contributions, form submissions, or event participation.

While the system has a default set of Engagement points, most organizations will opt to create their own Engagement Types and decide how many points to assign for each kind of action. You can then link them to Activist Codes, Master Survey Questions, Event Roles, Contributions, and Form submissions.



How Are Engagement Points Assigned?

As Engagement Points are a system-default, these are currently being tallied in the system using pre-defined coding to append to a Contact. While the point amounts per action type and names of the categories can be adjusted, the System Labeled options cannot be altered otherwise.

Advocacy Form	1
Contact Contribution	1
Contribution Form	1
Event Host Form	1
Event Signup Form	1
Peer to Peer Form	1
Petition Form	1
Self Service Portal	1
Self Service Portal Request	1
Signup Form	1
Story Collection Form	1
Ticketed Event Form	1
Volunteer Form	1
Volunteering	20

Customizing Engagement Types

When creating your own Engagement Types, EveryAction only allows application of points to a total in 3 ways:

- Creating/editing an Activist Code
- Addition/editing of an Event Role
- Master Survey Questions

This will be indicated by the Engagement Type in each of these sections upon creation.

New Master Survey Question

Master Survey Question

Cycle

Type*

Campaign

Engagement Type

New Activist Code

Activist Code Type*

Campaign

Engagement Type

New Role

Name*

Available on public website

Engagement Type

Leveraging Engagement Data

Once your Engagement Points have been tweaked to your preferred specifications, these can be used either directly through the **Engagement Points Report** or through Create A List.

This way, you can ensure that high-tier communications or invitations that need to be sent to your most engaged contacts are ready for quick access.

Engagement Points

contacts with Engagement Points based on the following:

Committee

Campaign Type

Campaign

Engagement Type

Engagement Source

Engagement Date --Select a Date Range Type--

Engagement Points 1 to 1

Home / Engagement Points Report

Engagement Points Report

View when engagement points are earned and the activities driving engagement.

Export As... Report Actions

Applied Filters Edit Filters

Contact Records: All Contacts Engagement Date: 6/8/23 - 10/1/24

Report Summary

First Engagement Date	Last Engagement Date	Engagement Points	Engagement Count	Number of Contacts
6/8/23	9/30/24	1.36K	1.27K	926

Group By

VANID	Contact Name	Engagement Date	Engagement Points	Engagement Count	Engagement Type	Engagement Source	Campaign	Campaign Type
112405930	Lawrence, Ilona	9/30/24	1	1	Contact Contribution	Contributions		
112388951	Jones, Annetra	9/29/24	20	1	Volunteering	Events		
112721060	Jonathans, Jonathan	9/26/24	1	1	Advocacy Form	Online Form Submissions		
112388722	Brown-Spencer, Bonita	9/25/24	1	1	Contact Contribution	Contributions		
112388723	Rhone, Carlette	9/25/24	1	1	Contact Contribution	Contributions		
112388724	Cross-Johnson, Courtney	9/25/24	1	1	Contact Contribution	Contributions		
112388725	Taylor, Kerene	9/25/24	1	1	Contact Contribution	Contributions		
112388726	Taylor, Tandra	9/25/24	1	1	Contact Contribution	Contributions		

Edit Columns

Additional Resources

Support

- Contact your System Administrator
- Email help@EveryAction.com
- Call (202) 370-8050
- Submit a Support Request Ticket from the Main Menu of the EveryAction CRM



Knowledge Base Articles

- [Manage Your Users with User Roles in EveryAction](#)
- [User Profiles in EveryAction](#)
- [Creating Event Signup Templates](#)
- [Engagement Points](#)



Additional Training

- Bonterra Academy: <https://help.everyaction.com/s/article/Bonterra-Academy-Self-Signup>
- Foundational Webinar Series
- Upcoming initiatives
- Videos in Bonterra Academy



Thank You for Attending!

