DONOR ENGAGEMENT

Creating Highly Effective Online Forms

Bonterra™

Meet your Trainer...

Jaime

Training Specialist

Donor Engagement

EveryAction

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Agenda

1. Online Actions Overview
2. Types of Forms and their Uses
3. Creating Online Actions Forms
    1. Basics
    2. Building Your Page
    3. Customizing Your Form
    4. Creating Thank You Pages and Confirmations
    5. Sharing Your Form on Social Media
    6. Deactivating Your Form
    7. Publishing Your Form

4. Q&A

Online Actions Overview

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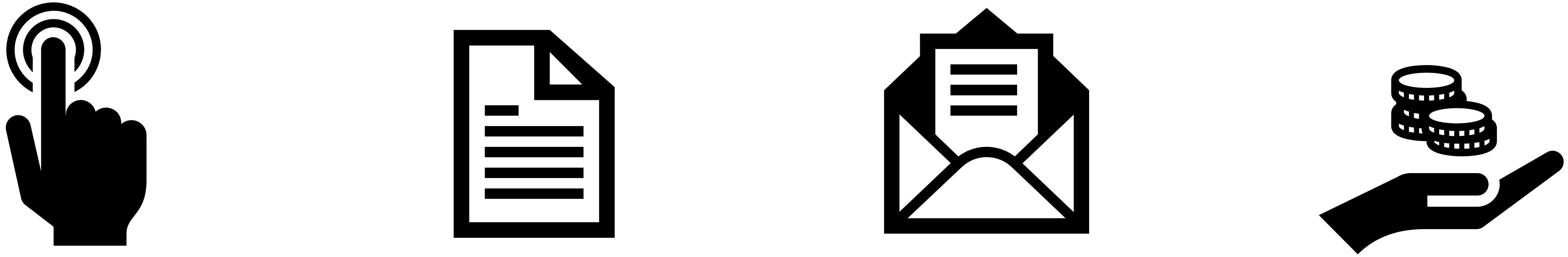
Online Actions Introduction



Online Actions:

- Successful network effect creates streamline form filling and supported by Fast Action
- Adaptable forms ensure your beautiful forms are compatible across devices
- Fast loading speeds and social media functionality engage audiences with prompt responses
- Limitless forms ensure you are reaching all your audiences for all your purposes
- 100% EveryAction integration means seamless data reporting and record updating in real time!

Online Actions

With **Online Actions** you can gather information from and share information with new and existing supporters.

Create Forms for advocacy, contributions, events, petitions, email and volunteer signups, and story collection.

Create Pages to publicize organizational updates, events, and election data. You can also use them for attendee check-in.

These tools **support organizational growth, fundraising goals, and the success of your overall mission.** Basic performance metrics display on your Dashboard. You can also run reports for a comprehensive reading.

Tracking Online Actions

Gather and share information with supporters using Online Actions forms that support organizational growth, fundraising goals, and the success of your overall mission. You can track supporters' engagement with your forms and create lists based on the information they shared, contributions given, or the events they signed up for.

There are many ways to track the results of your form submissions, including from:

- the Online Actions dashboard
- the Online Activity Report
- the Online Forms Comparison Report
- individual contact records

You'll also be able to use the results of form submissions to search for contacts using Create a List.

Types of Forms

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Type of Forms and their Packages:

	Advocacy	EA/EveryAction Digital	Online Contributions	Digital Organizing	Peer-to-Peer	Digital Stories
Advocacy	✓					
Contribution		✓	✓			
Event Host		✓		✓		
Ticketed Event		✓	✓			
Event Signup		✓		✓		
Peer-to-peer					✓	✓
Story Collection		✓		✓		
Volunteer		✓		✓		
Petition		✓		✓		
Signup						

Type of Forms and their Use Cases:

	Advocacy	EA/EveryAction Digital	Online Contributions	Digital Organizing	Peer-to-Peer	Digital Stories
Advocacy	✓					
Contribution		✓	✓			
Event Host		✓		✓		
Ticketed Event		✓	✓			
Event Signup		✓		✓		
Peer-to-peer					✓	
Story Collection						✓
Volunteer		✓		✓		
Petition		✓		✓		
Signup		✓		✓		

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Creating Online Actions Forms

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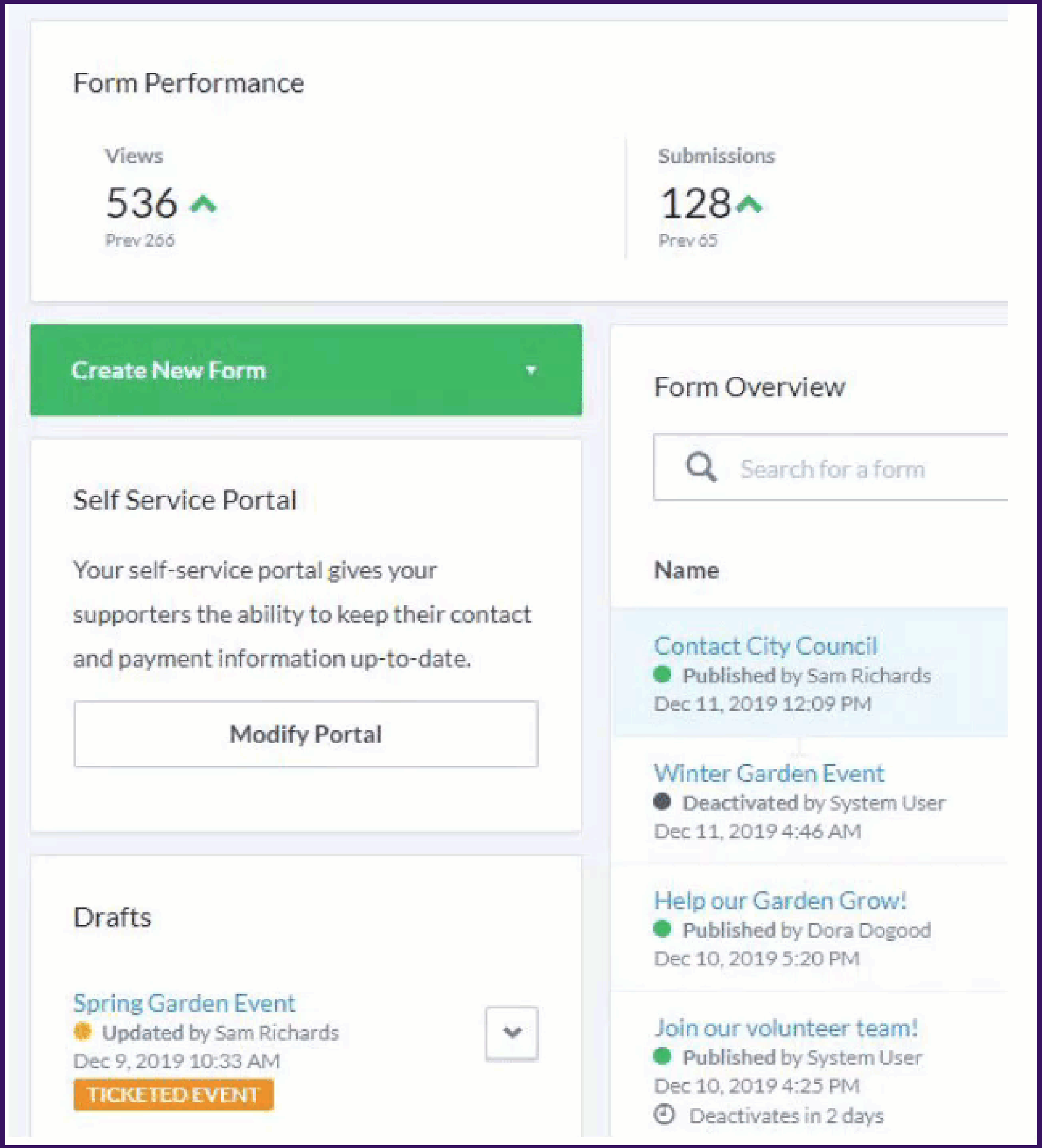
Creating Online Actions Forms

Each type of Online Actions form follows the same workflow. The forms available to you depend on the packages your organization purchased.

To create your form, open Online Actions from the sidebar and select **Create New Form** and the type of form to create.



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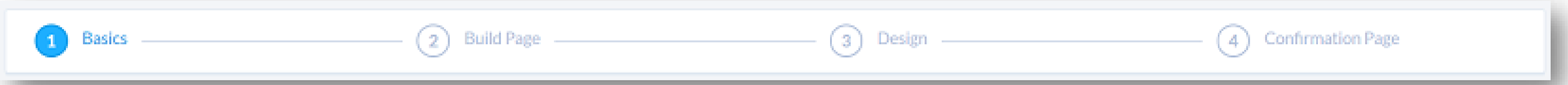
Form Types and their Uses

- **Advocacy** - Amplify your message by selecting targets for your supporters to contact with a message you draft.
- **Contribution** - Raise money with a form you link to from your website, Targeted Emails, and Mobile Messages.
- **Ticketed Event** - Register supporters for and sell or distribute tickets to events online.
- **Petition** - Collect digital signatures from your supporters.
- **Signup** - Get new supporters signed up with your organization.
- **Volunteer** - Gather supporter commitments to volunteer with you.
- **Peer-to-Peer Fundraising** - Empower supporters to fundraise on your behalf with personalized campaigns on social media.
- **Event Host** - Empower supporters to host events on your behalf.
- **Story Collection** - Empower supporters to share their perspective on advocacy positions and motivate others to join your cause.

Form Design Steps



Most form types have four steps:

•**Basics**

•**Build Page**

•**Design**

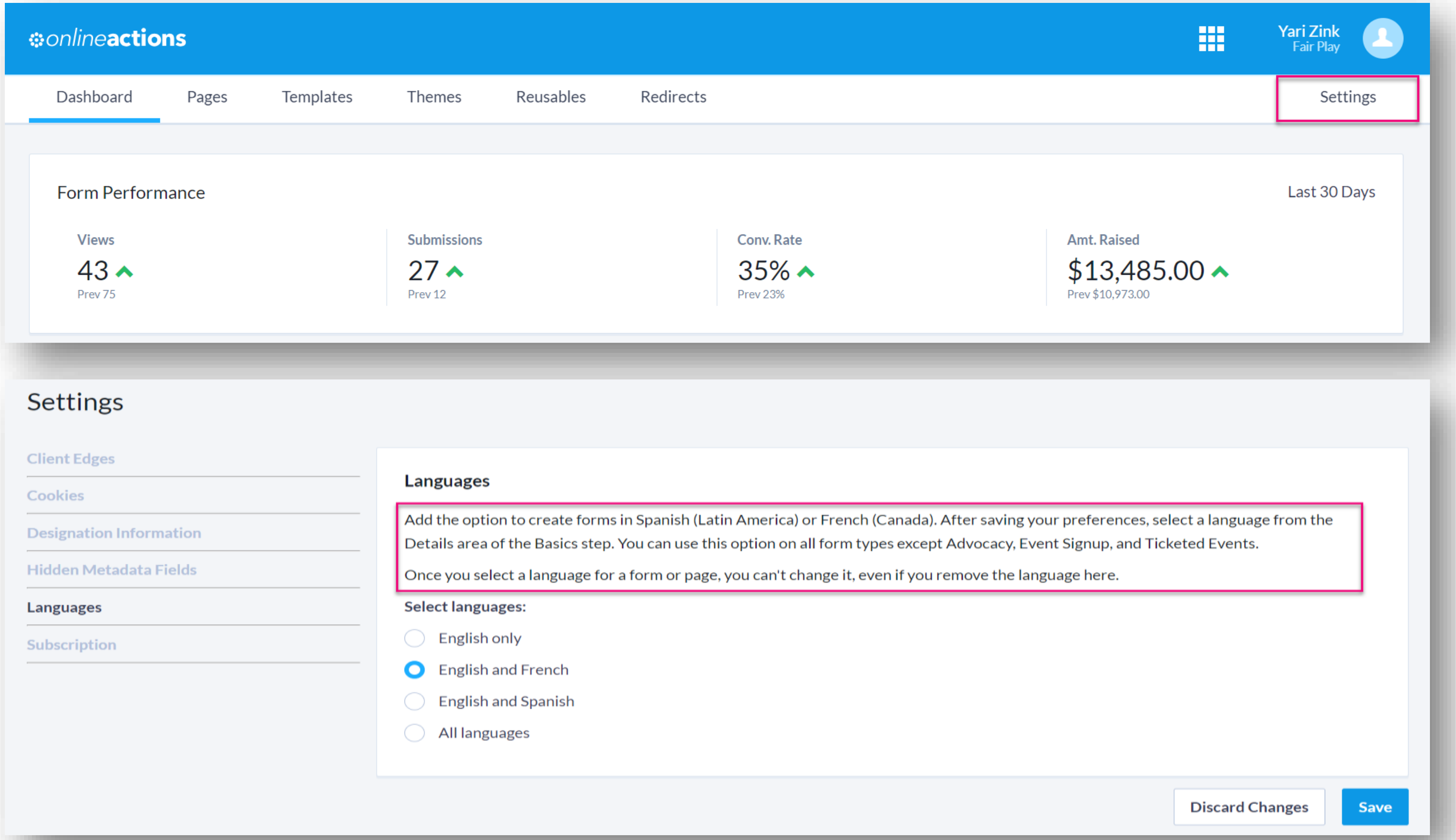
•**Confirmation Page**

Setting you language

Enable the option to create French and/or Spanish versions of your forms by **updating your Language settings**. You can apply multiple languages to the following form types:

- Contribution
- Event Host
- Peer-to-Peer
- Petition
- Volunteer

Navigate to **Settings** at the top of your Online Actions header.



Find **Languages on the left-hand menu** and choose to **enable English only** forms, or combination **English/French**, **English/Spanish**, or **All languages** forms. You can **change your language settings** at any time, but the **language selection for forms you have already created will not change**.

Basics

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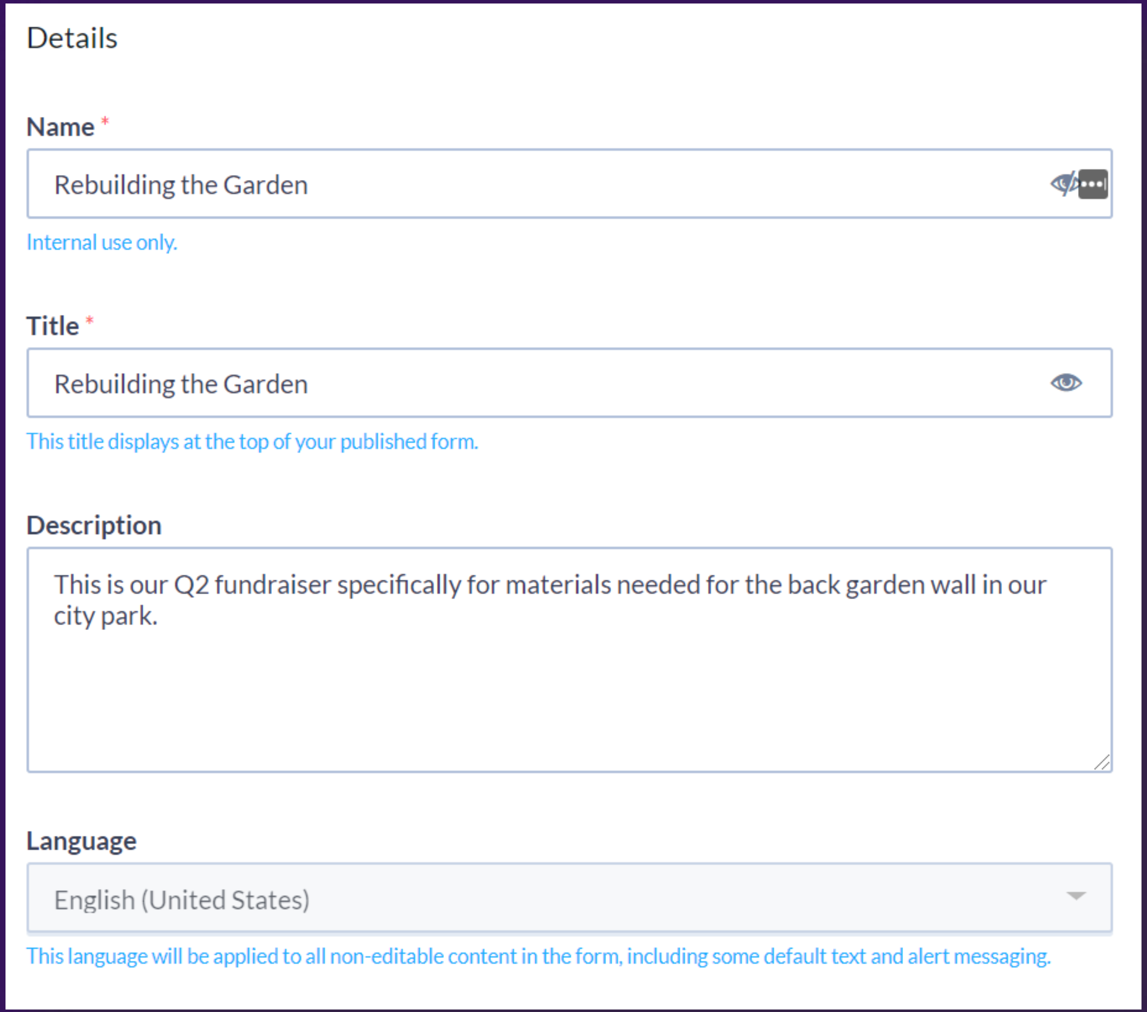
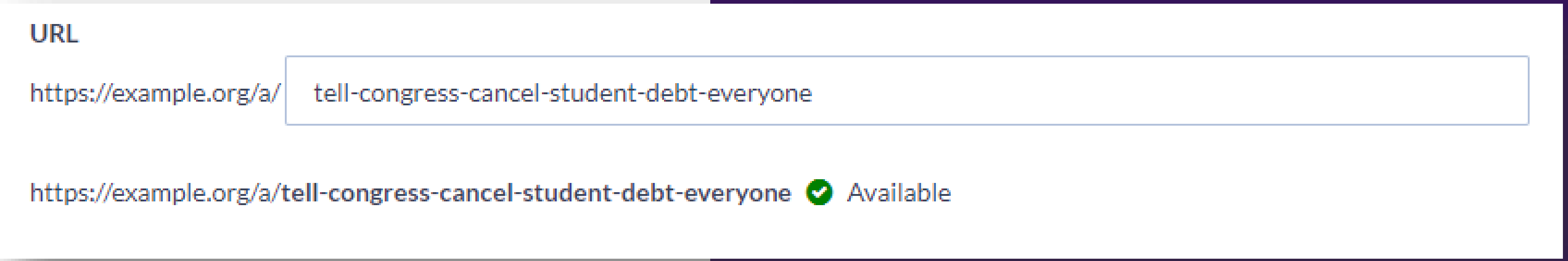
Setting Basics

Details - Provide a form name and description, which is for internal use, and the title you want your supporters to see. If you have multilingual capabilities activated for your account, you can set the default language for the form. Once a form has been published, you will not be able to update the language, even if you update your language settings.

If you have a Vanity Domain, you will also see an option to add a custom URL for your form





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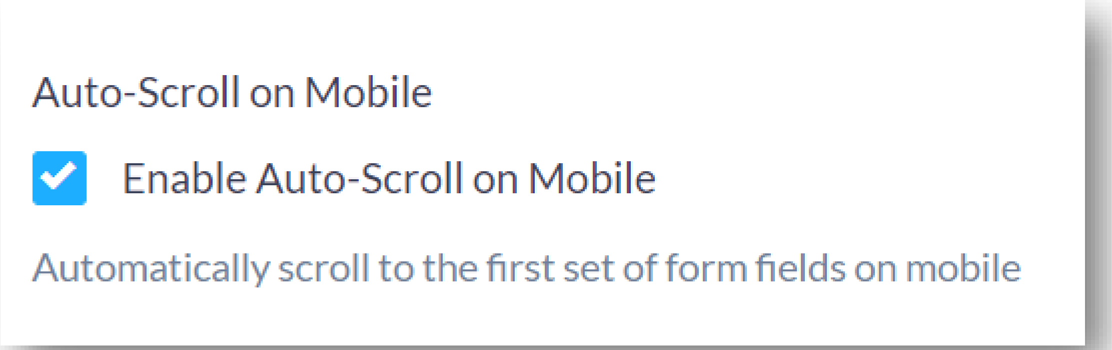
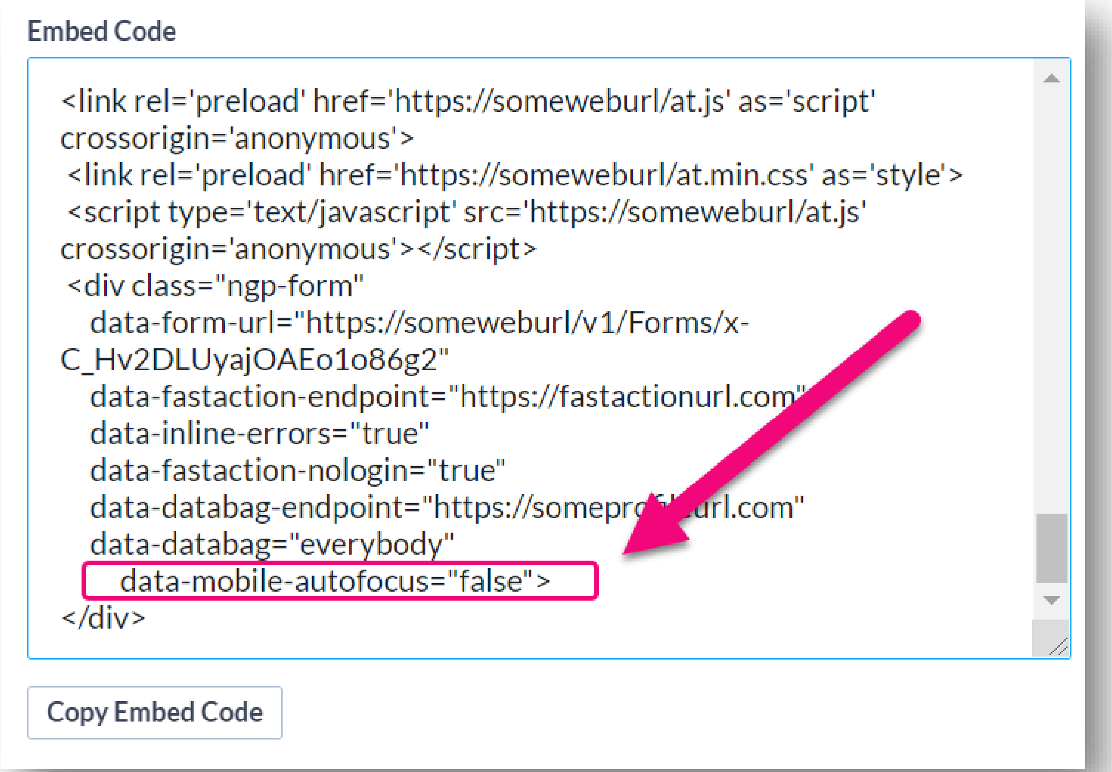
Auto-Scroll on Mobile

When enabled, **the form jumps, or automatically scrolls ahead to fields a supporter needs to fill to submit**, saving them the trouble of sifting through content before arriving at the actionable part of the form. This feature is off by default for embedded forms, but you can change this by setting the data-mobile-autofocus option to true in your embed code.

While the auto-scroll option is off by default for embedded forms, you can change this by setting the **data-mobile-autofocus** option to **true** in your embed code.

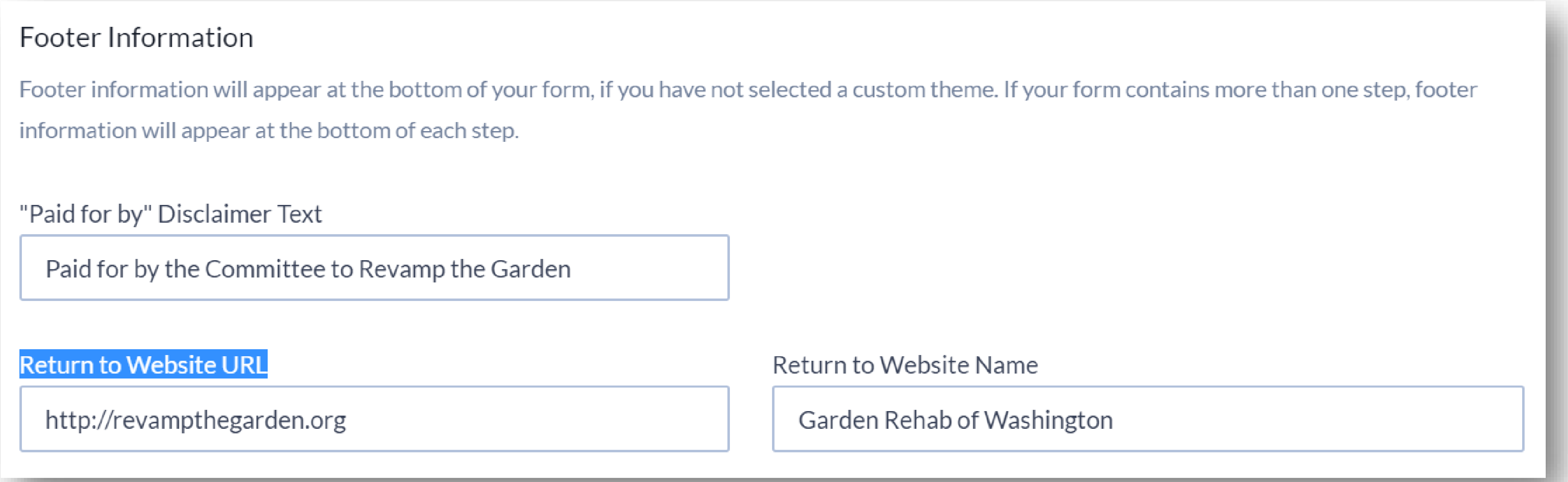




Adding a Footer

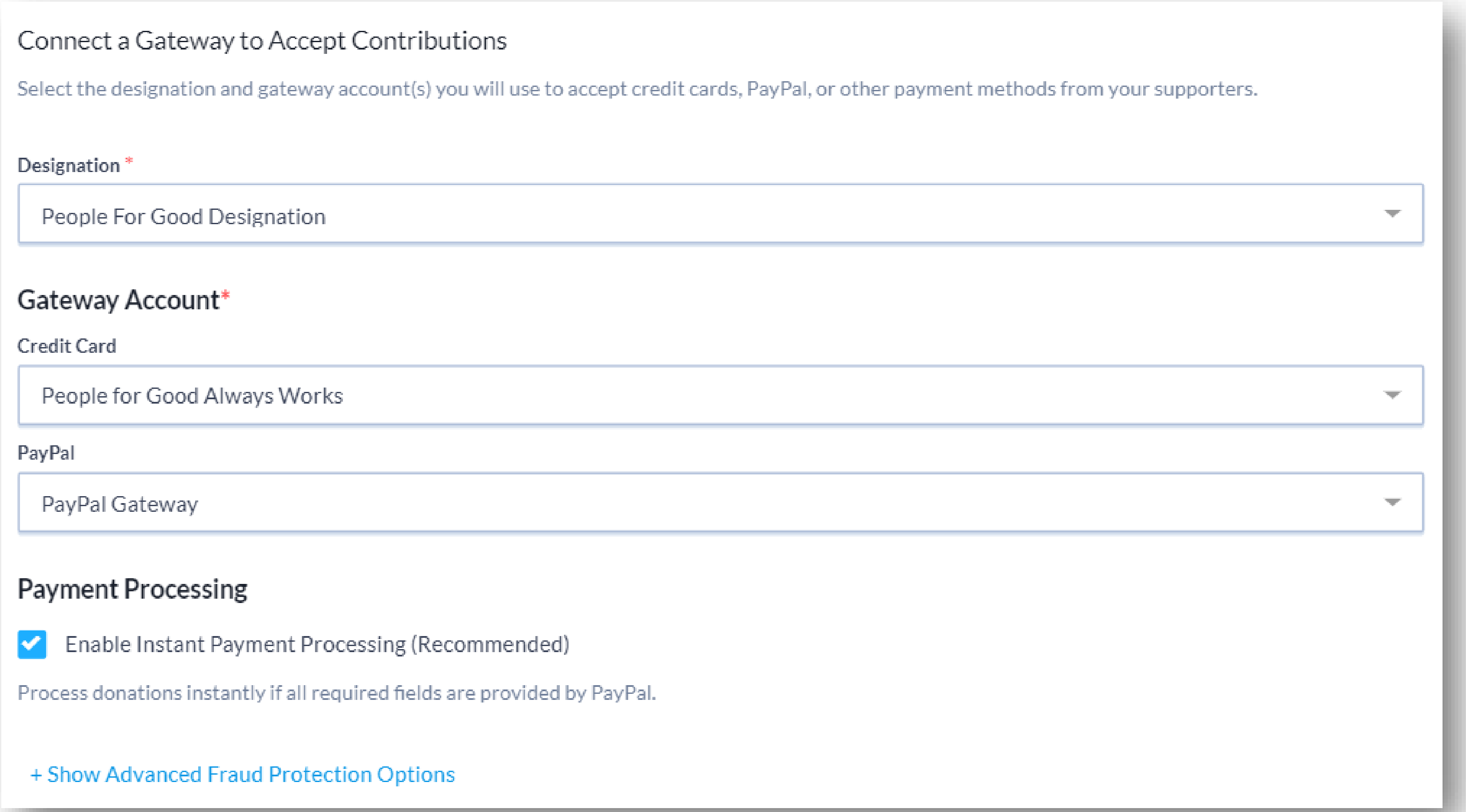
Add information in the footer of your form, including a disclaimer, a website URL, and a website name. If you are using a form for a political campaign, you can include your *Paid for by* disclaimer text here.

When you enter a website name in addition to a URL, the **link will be applied to the website name**. For example, if your URL is revampthegarden.org and you list Garden Rehab of Washington as the website name, Garden Rehab of Washington becomes a clickable link.



Connecting a Gateway

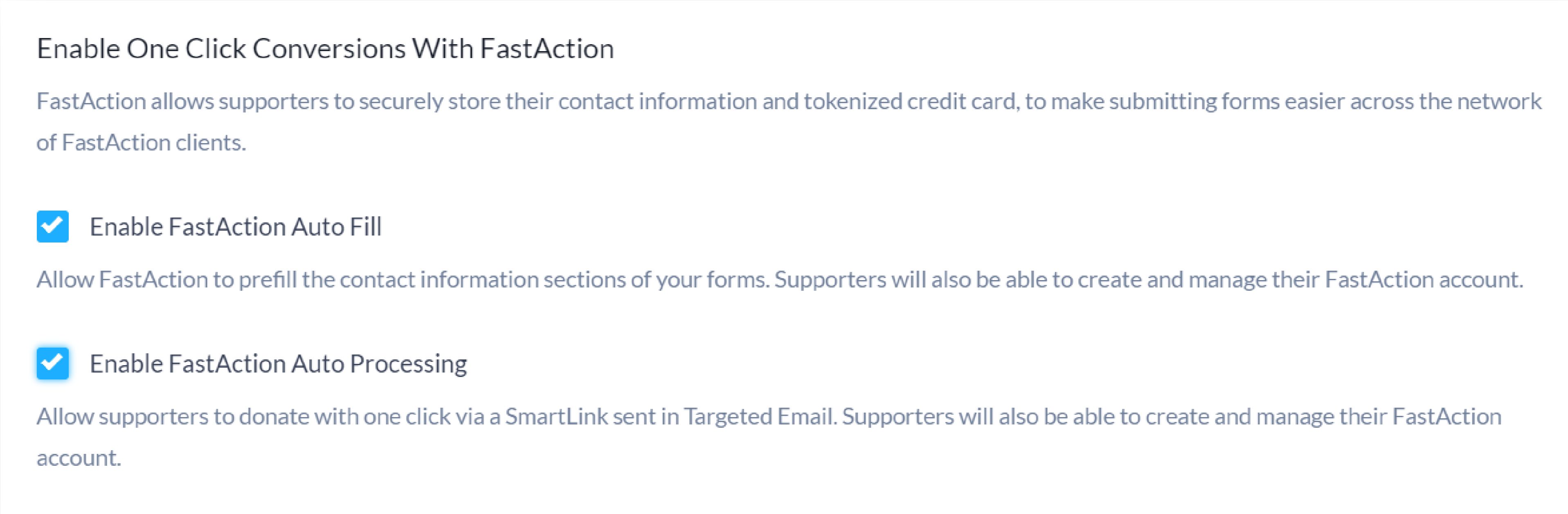
On **Contribution** and **Ticketed Event** forms, you'll need to indicate which **Designation** the form is associated with and link to a **Gateway** that can accept online payments.



FastAction

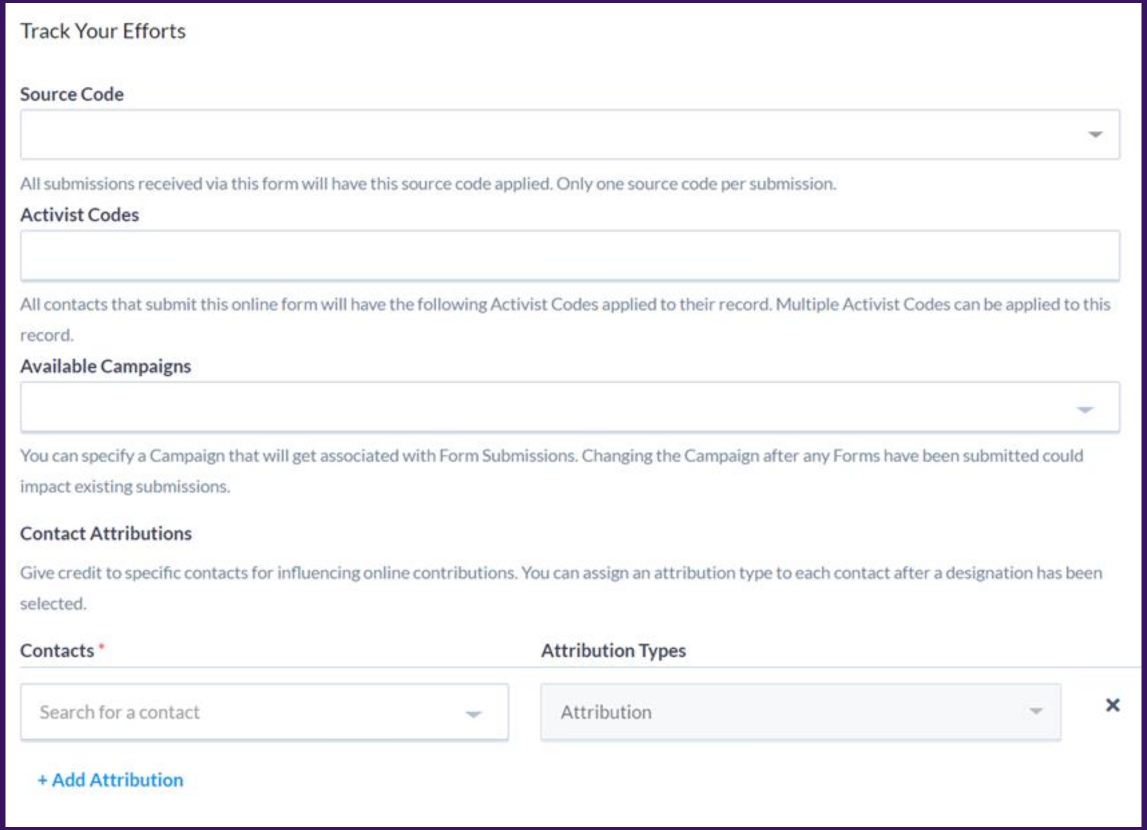
Enable FastAction so your **supporters can donate or take some other action with one click**. This feature can improve your conversions and donation rates. Supporters who have signed up for FastAction will open forms that have their personal information pre-filled. All they have to do is make choices in actionable fields, entering a donation amount.

If you are creating a **Contribution** form, you can also turn on one-click processing for **FastAction** users who take action directly from your **Targeted Emails**.



Track Your Efforts

Support your online fundraising and advocacy efforts by adding **codes** to form submissions and contact records that **track form performance over time and in comparison to other forms**. Associate your form responses with particular campaigns or even a specific contact.



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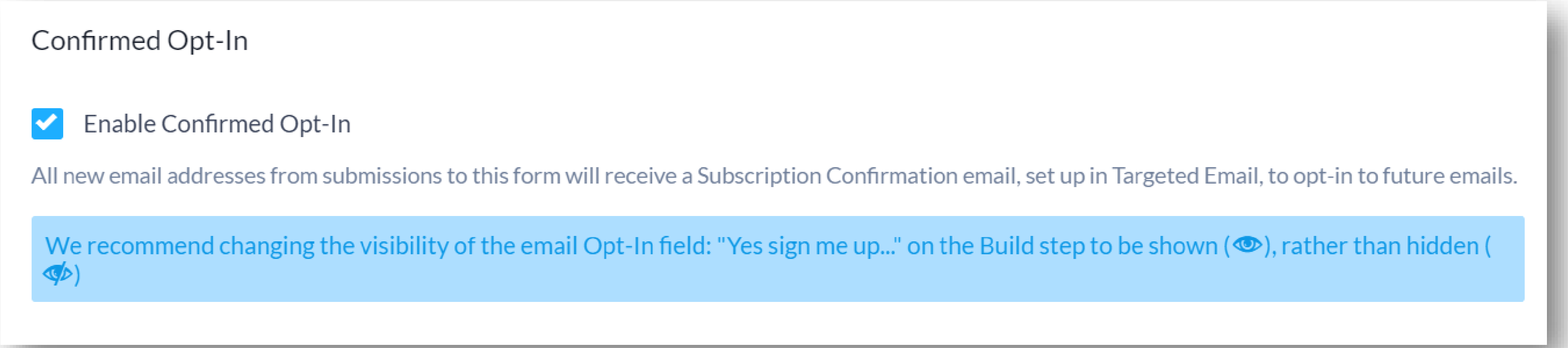
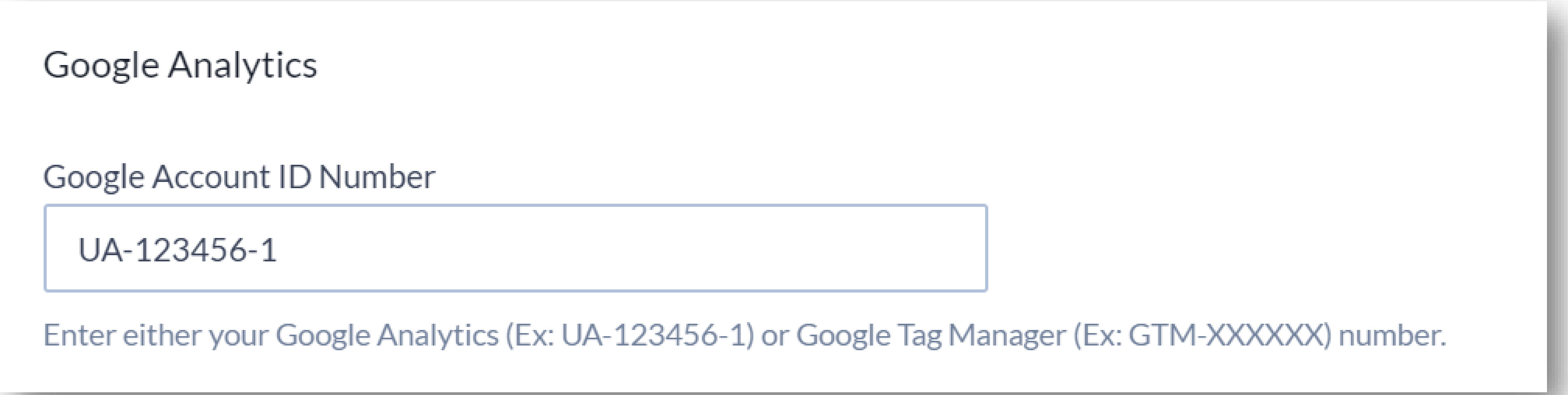
Confirmed Opt-in

When enabled, **supporters are asked to confirm their subscription via email** before you can add them to your email list. You can further configure this option using the Build Page step and using Targeted Email.



Google Analytics

Track your website traffic and marketing effectiveness. Visit *analytics.google.com* for more information.



Building Your Page

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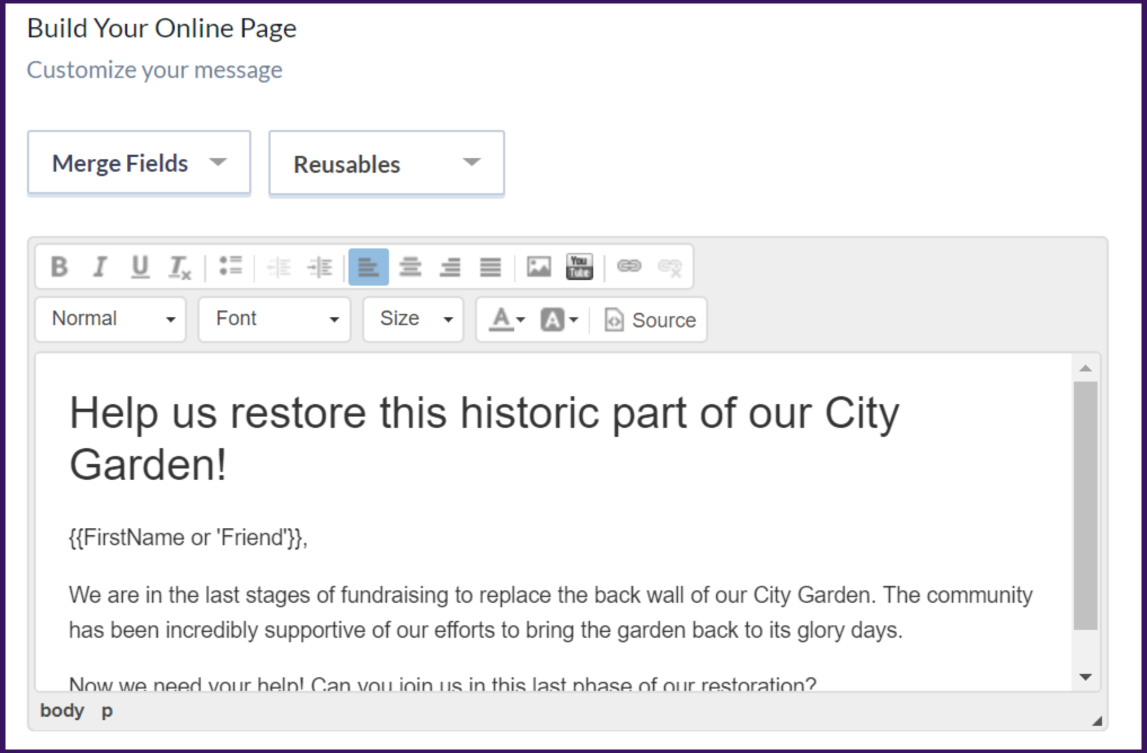
Building Your Page

In the **text editor** at the top of the Build Page step, enter **the messaging you want included in your form**. Format your text, insert images, embed videos, and personalize the form for your supporters with Merge Fields and Reusables.

With **Contribution and Advocacy forms**, you can choose to have your form **appear as a continuous page or a multi-part process**. The layout options available for Advocacy forms depend on the delivery method and target groups you select on the Configure Advocacy step.



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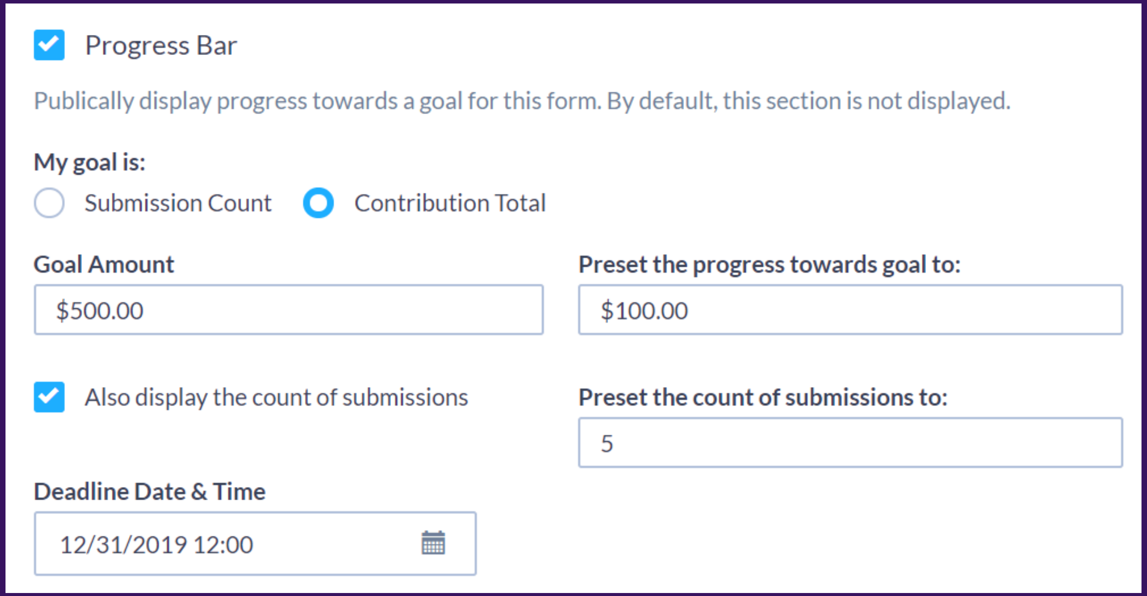
Progress Bar

Some forms can also be configured to display a **Progress Bar that shows your total number of signups and contributions, or amount given** to your organization. You can also display the deadline for supporters to take action.

Contribution forms may have additional sections, depending on the packages you have. These sections include Contribution Information, Premiums, and Tributes & Gift Memberships. At the bottom of this step you can also choose to add a Recurring Upsell Lightbox that encourages donors to convert one-time donations into a recurring commitment.



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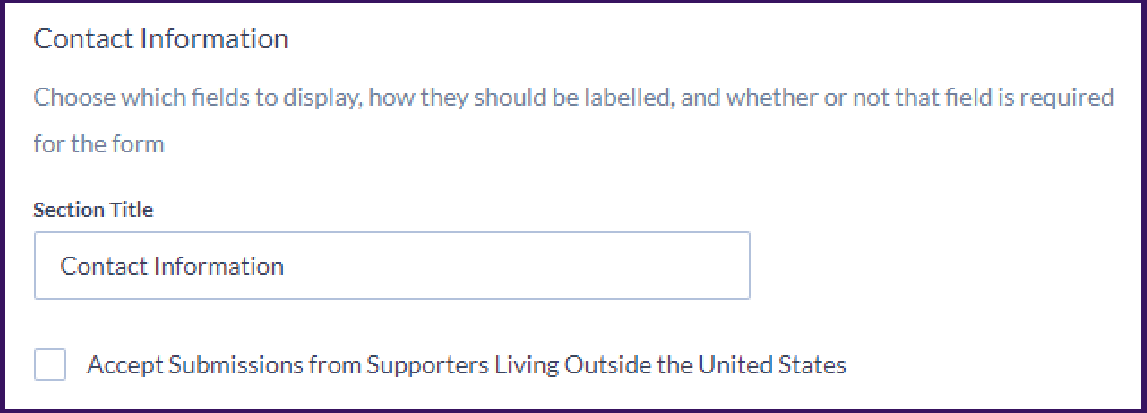
Contact Information

Select the information you want to collect from your supporter.

Toggle on the fields you want enabled and use the checkboxes to require those fields. Hide or unhide fields and enter default values for certain fields to make it easier for supporters to complete a form.

You have the option to change how the **Field Label name** displays online, but that does not change the field name in your contact records.

By default, new Online Actions forms are set to only allow submissions or contributions from supporters living in the United States. **To accept responses from supporters with non-US phone numbers or addresses**, **you can select to accept international submissions.**



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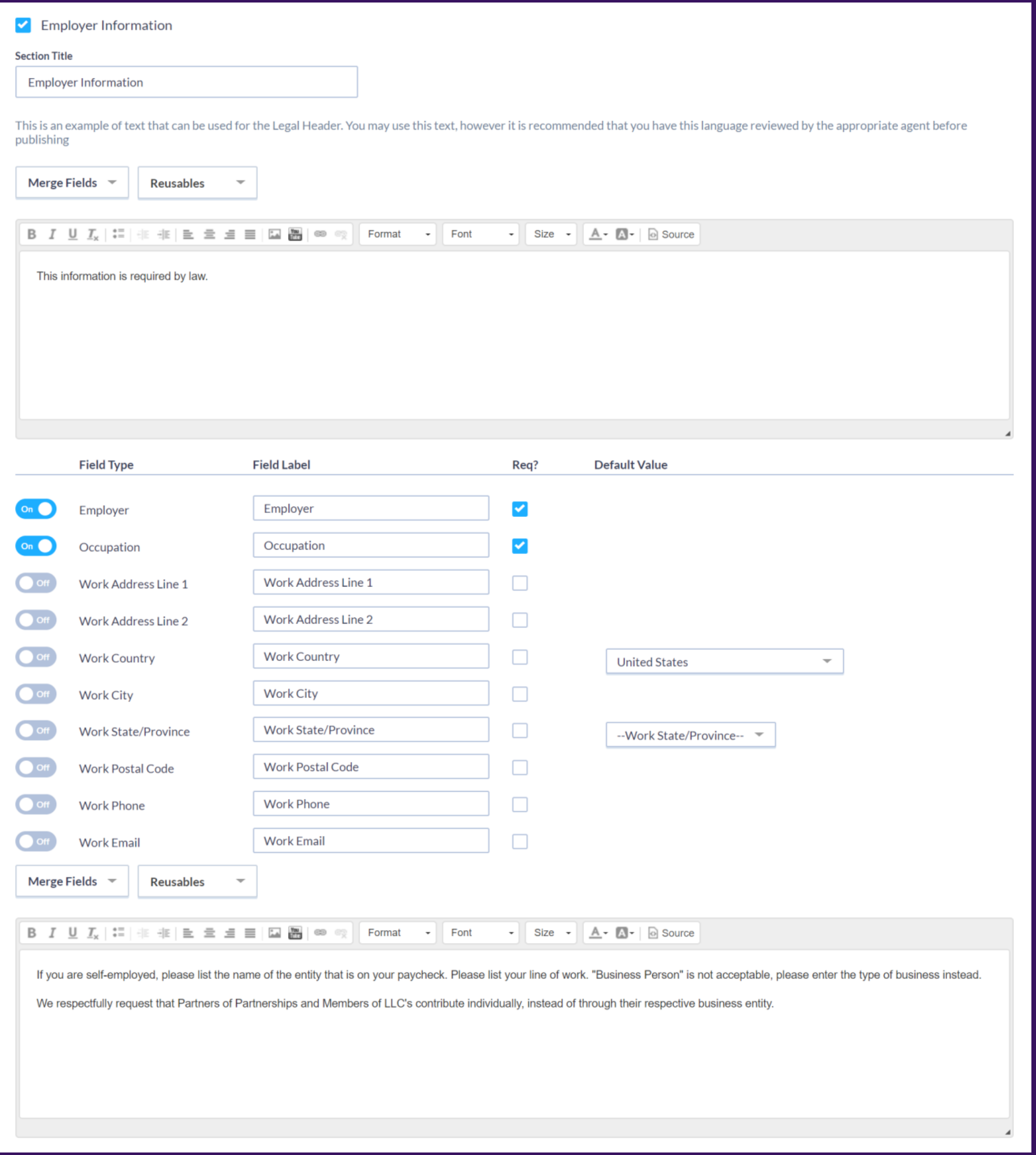
Employer and Occupation Information

If you want to collect **Employer and Occupation information**, enable this section and specify the data you want to collect. Supporter contact records will update and you can search on this criteria in Create a List.

If the Designation you are using has a disclosure report (such as with a political campaign), the Employer Information section may include additional fields needed for compliance purposes.



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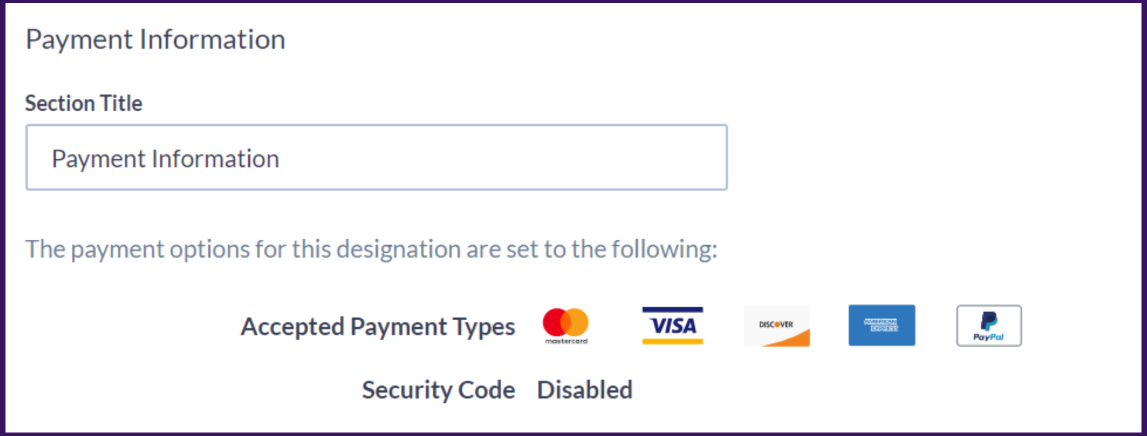
Payment Methods

If you are creating a Contribution form, you will see a section that lists available payment methods using the Designation and Gateway you selected above. You can change what this is called in your form.



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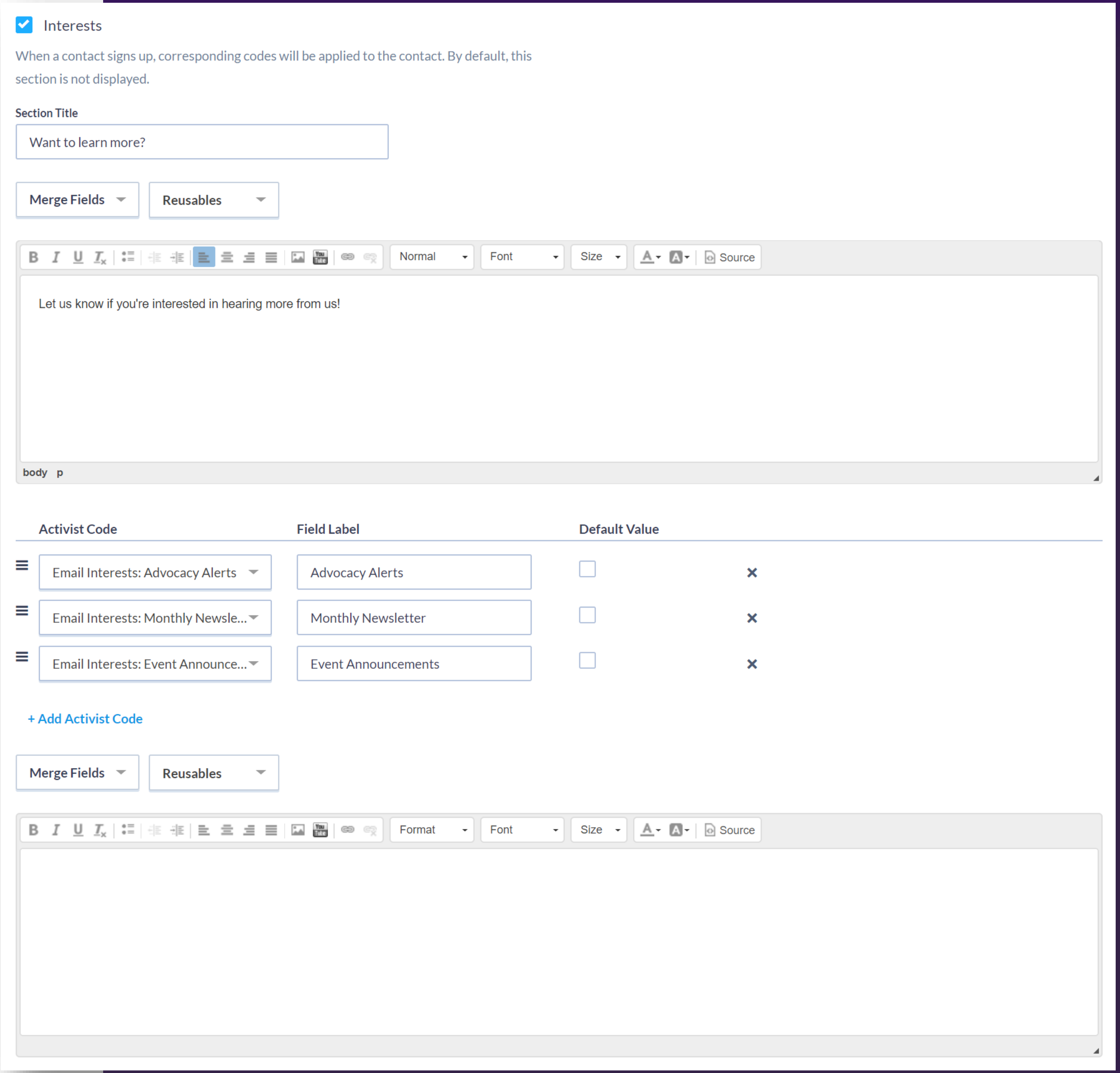
Interests

Collect information from your supporters about their interests.



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Activist Codes

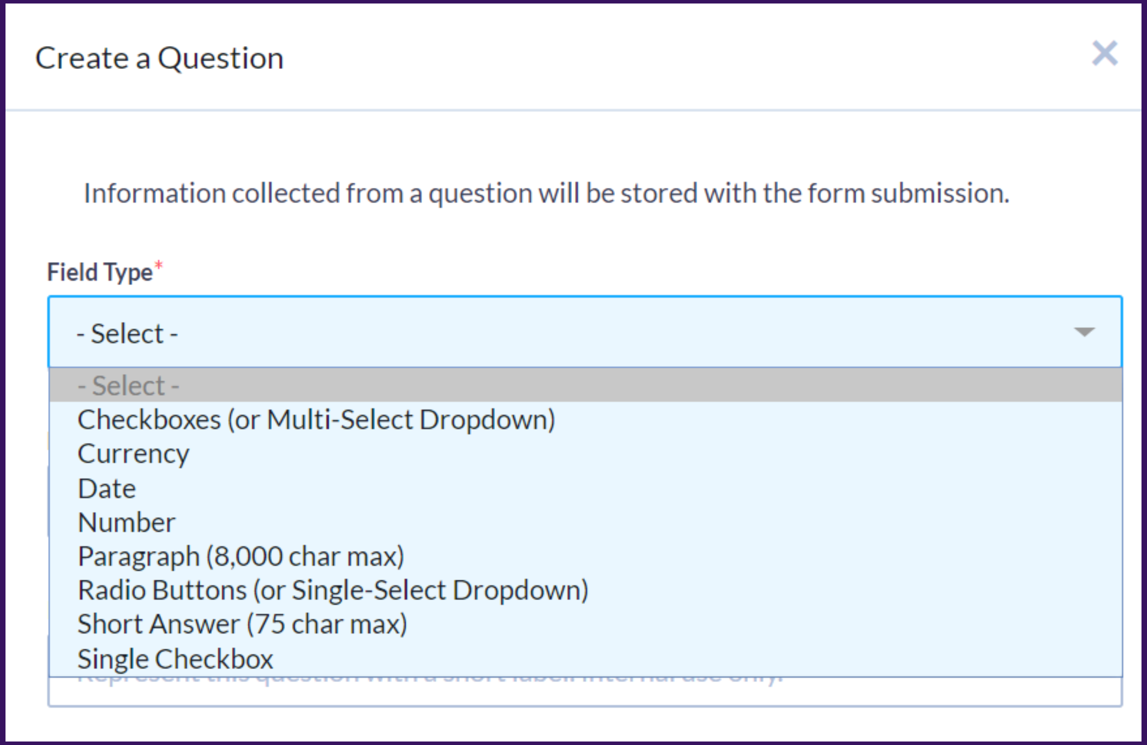
Capture areas of interest and contact preferences. When a supporter selects an interest on your form, a corresponding Activist Code is added to their contact record.

To collect or display **Additional Information**, **change the HTML code** or create a structured question to retrieve more information from supporters.

With **Create a Question**, specify the Field Type of your question (Checkboxes, Short Answer, etc.) that structure the responses supporters can give.

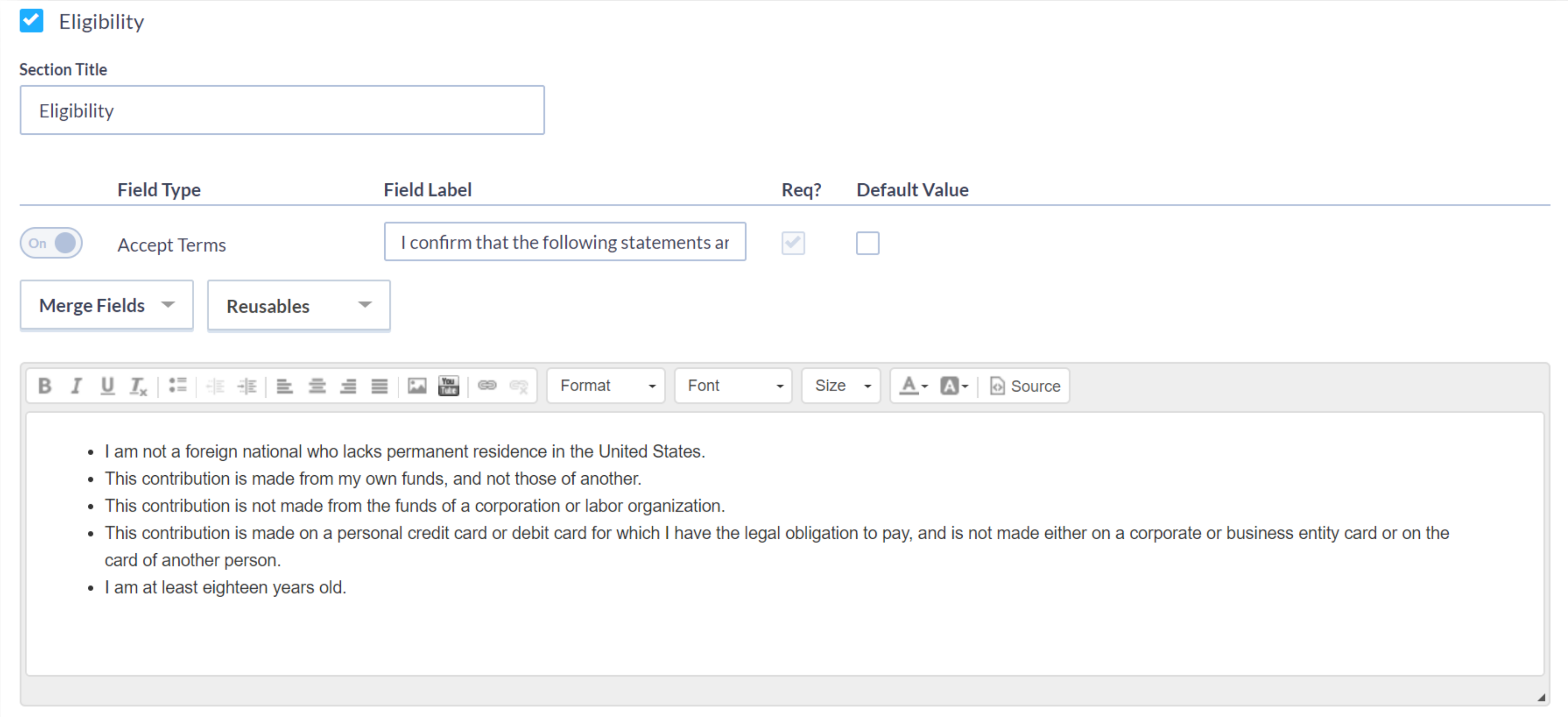
Depending on the field type you select, you can **map replies to contact record elements and track them later in your reports**.

- Map **Checkboxes (or Multi-Select Dropdown)** answers to **Activist Codes**
- Add **Paragraph** answers to the **Notes** section of a contact record
- Map **Radio Buttons** and **Single-Select Dropdowns** to either **Survey Questions** or custom contact fields
- Map **Currency**, **Date, Number, Short Answer,** and **Single Checkbox** answers to custom contact fields
- View replies in your **Online Form Custom Questions Report** without mapping them to contact records.



Eligibility of Terms

Some forms will include an **Eligibility or Terms section** that confirm a supporter's eligibility to participate or donate. Ticketed Event and Contribution forms have an Eligibility section. Event Host and Event Signup forms have, instead, a section called Terms.



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Submit Button

Choose what text appears on your form's Submit button. On the Contribution form, you can also include an {{Amount}} merge field in this section.

Submit Button

Customize the Submit button label. Include the {{Amount}} merge field to display the total contribution amount in the button label.

Contribute {{Amount}}

Customizing Your Form

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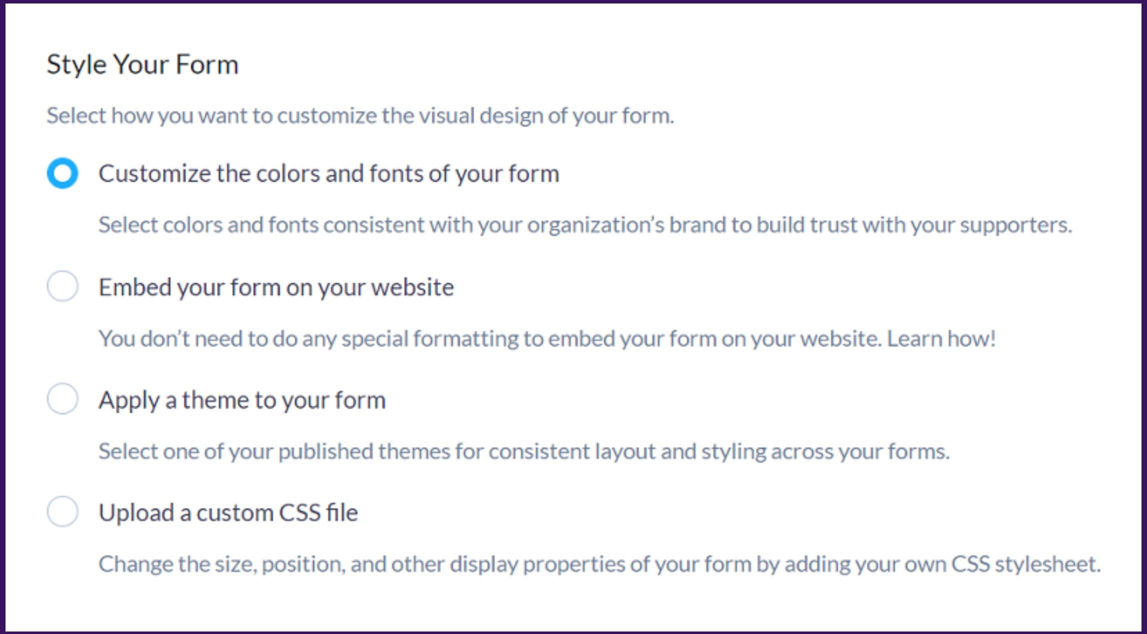
Customizing Your Form

Customize your forms to match the style of your website by applying Themes, applying your own CSS code, or using the Design feature in your form creation workflow.

When you are satisfied with your design choices, **select Preview before moving on to ensure the form has the desired look and feel**.



Creating Thank You Pages and Confirmation Emails

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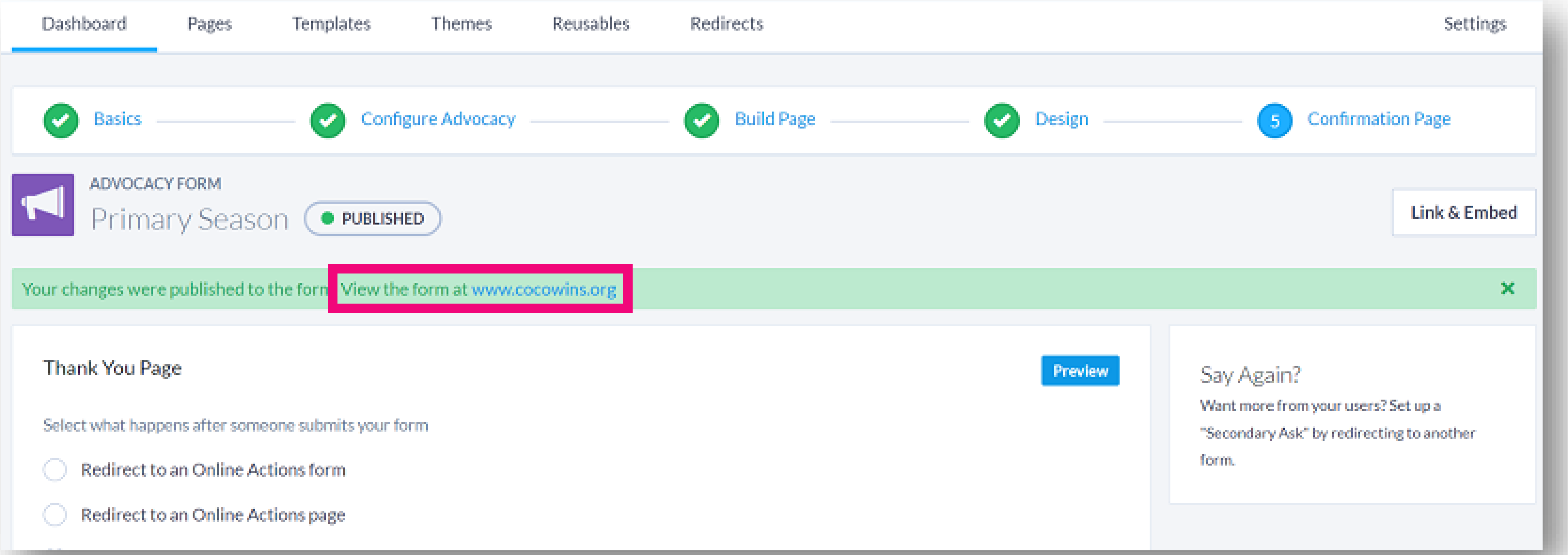
Creating Thank You Pages and Confirmation Emails

On **the final step, Confirmation Page**, choose to display a “Thank You” message after a supporter completes your form and/or send them an email confirming receipt of your form.

If you have a Vanity Domain, the URL you chose for the form appears above the Thank You Page section after you Publish.

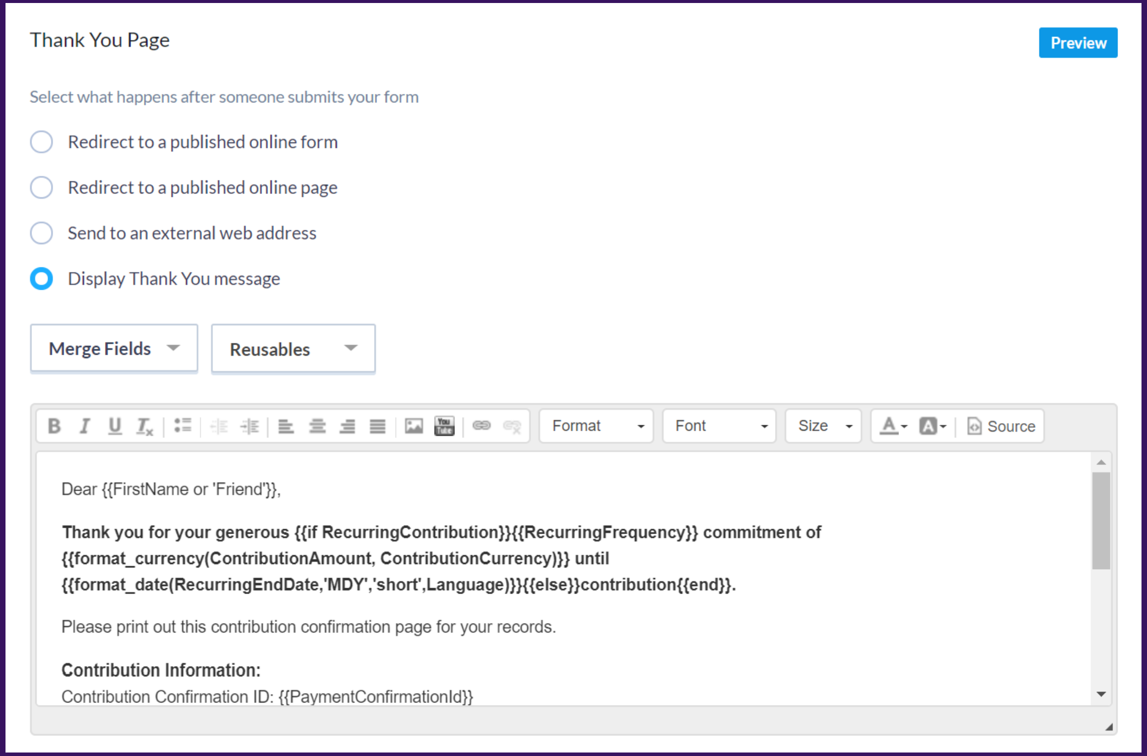
If you don’t want to create a **Thank You Page**, you can **redirect supporters to another Online Actions form, an Online Actions page, or an external URL**.



Creating Thank You Pages and Confirmation Emails

The editor in this section allows you to **format your text, include merge fields and reusables, and embed images and videos.** A default message is pre-filled and includes relevant merge fields for customizing a “Thank You” page to your supporters.

In the **Confirmation Email section**, draft your message in the primary text editor, as well as in the **plain text** box for recipients who cannot view HTML formatted emails. Provide **the address that displays as the Sender** and **the address supporters Reply-To**. You can also send a confirmation copy of your email to additional addresses.



Sharing Your Form on Social Media

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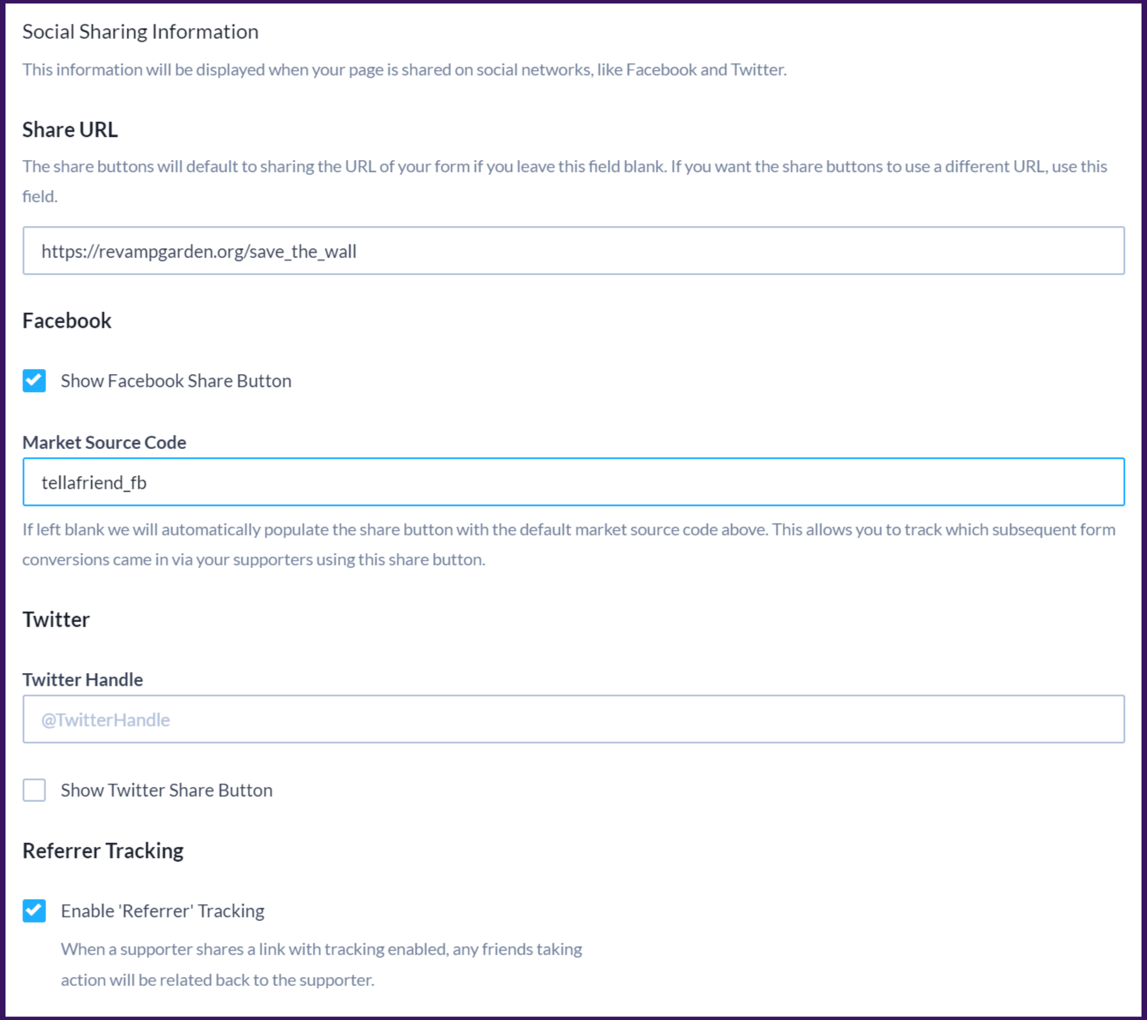
Sharing Your Form on Social Media

To **share your form on social media**, specify how it displays in the **Social Metadata** section. **Add an image, title, and brief description**. Review the requirements of the platforms you enable sharing for, to be certain your image works on their system.

You can also **empower supporters to share your form with their online networks** when you choose to include links to your social media. Allow your supporters to **share the form directly or share a page where the form is embedded or linked**. Set up tracking codes to trace supporters who donate or take action from one of your links.



Deactivating Your Form

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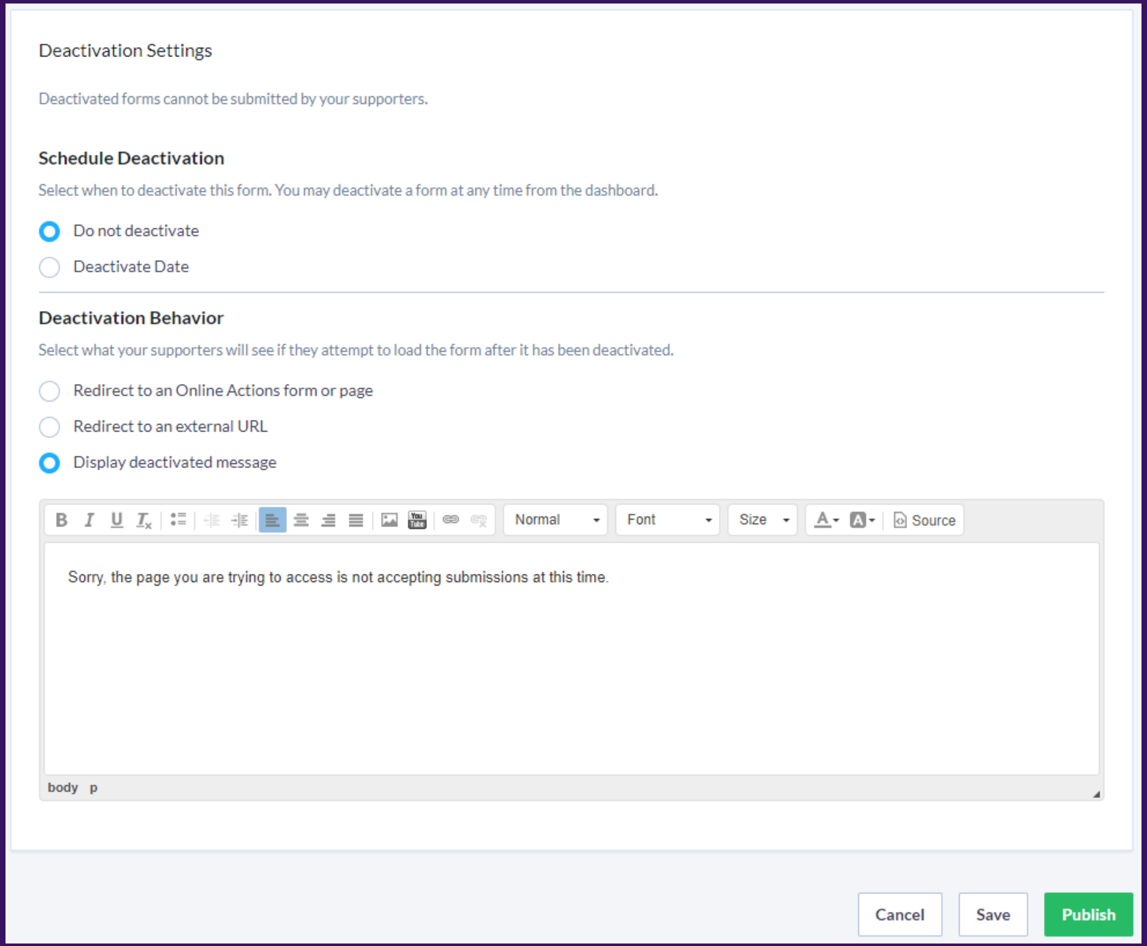
Deactivating Your Form

In the **Deactivation Settings** section, choose to have your form deactivate on a certain date and set a message to display when supporters reach a deactivated form.

Ticketed Event and **Event Signup** forms deactivate after your event concludes by default. Other form types remain active by default. In any case, you can choose when and if a form deactivates.



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Publishing Your Form

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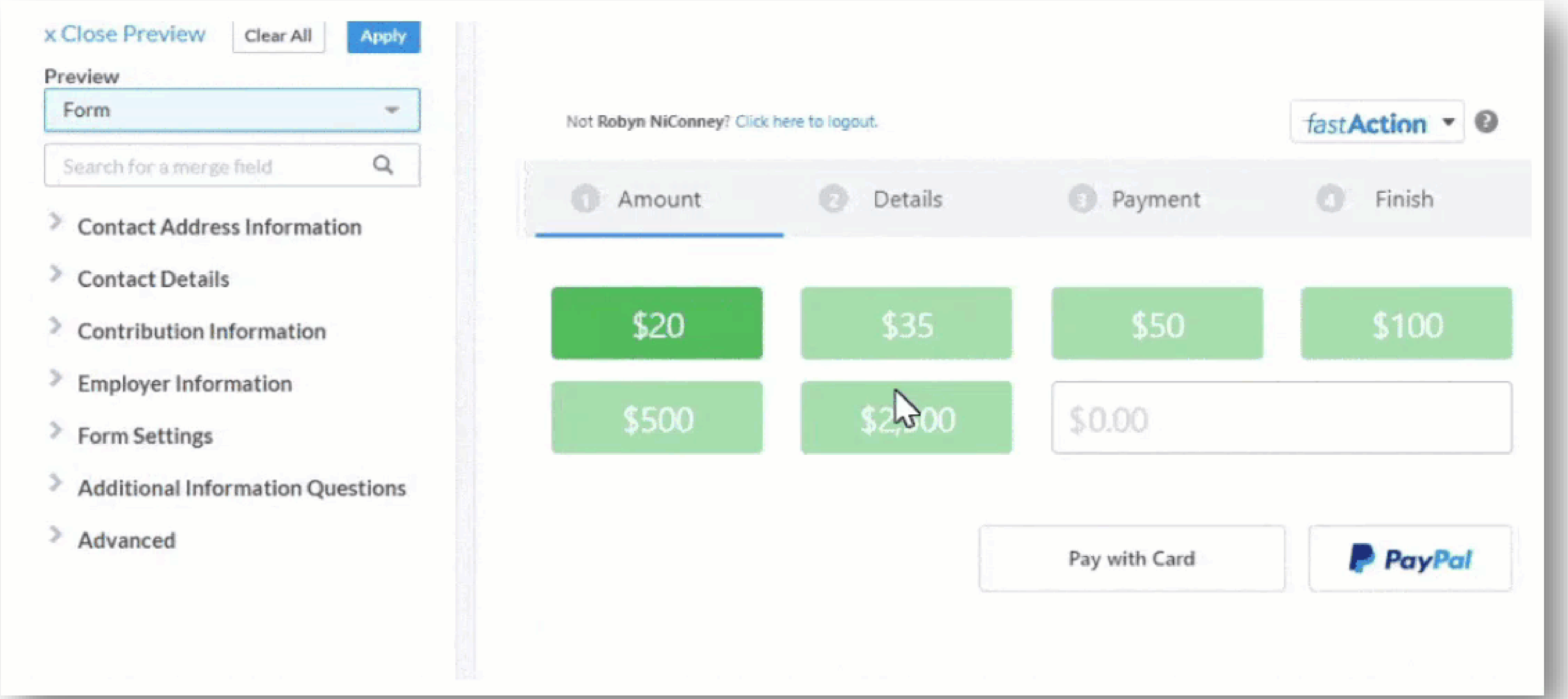
Publishing Your Form

At any point in the form creation process you can **Save and exit or Cancel your form**. Before you publish, select Preview to see how your “Thank You” page and confirmation email will look to your audience.



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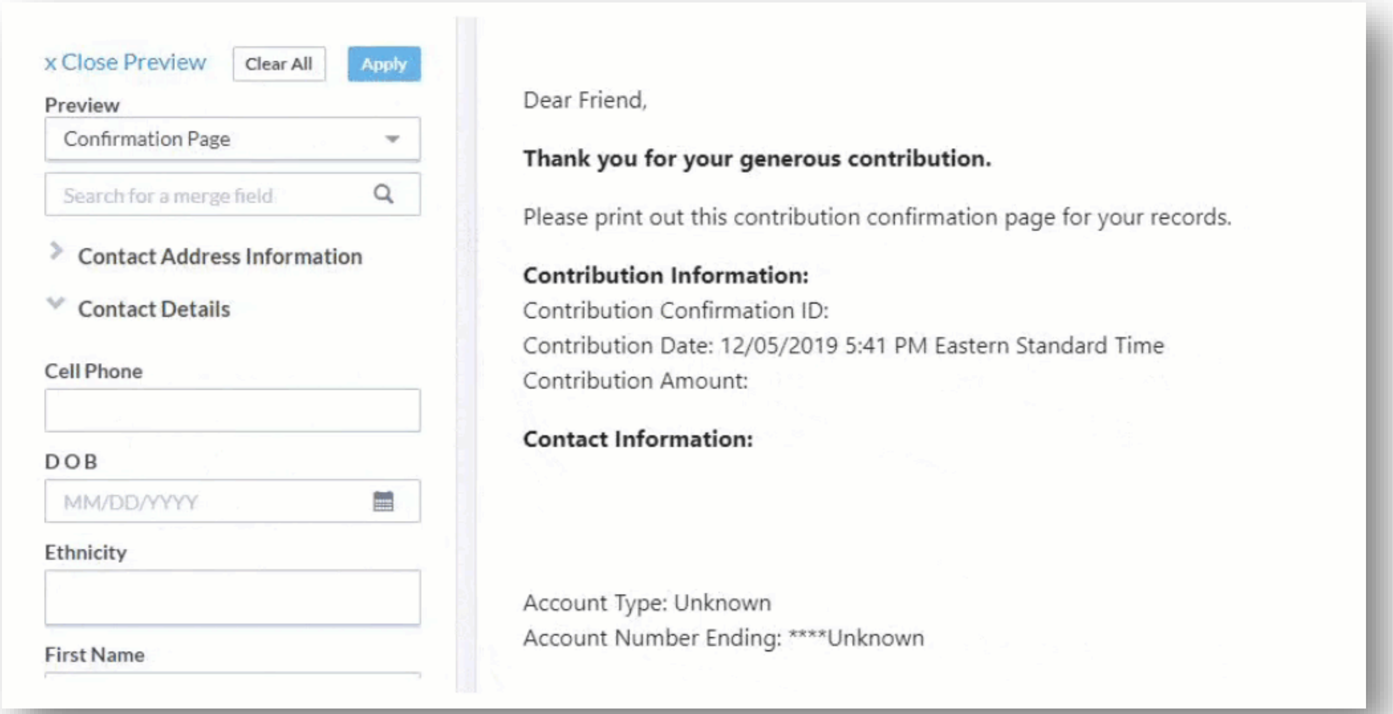
Publishing Your Form

Use the **dropdown menus** on the left side of your Preview page to **see how your form works with data in the fields**. Choose test values and select Apply and the form will render the information of an individual supporter.

After you **Publish your form**, **select Link & Embed** to retrieve your URL and the code for embedding the form on your website. If you embed your form, your banner image, *Paid for by* disclaimer, and custom CSS will not be visible.



Q&A

Q & A

Additional Resources

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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

Help Center Resources

- Overview: Online Actions
- How to: Create Online Actions Forms
- Navigating Online Actions Turorial
- How to: Use Themes to style Online Actions Forms
- How to: Use Questions on Online Actions Forms
- How to: Use custom CSS with Online Actions
- How to: Track responses to Online Actions

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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!

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