

DONOR ENGAGEMENT

Evaluating Your Impact Using Source Codes



Introduction & Learning Objective

Meet your Trainer...

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Agenda

1. Source Code Overview (2 minutes)
2. Creating Source Codes (5 minutes)
3. Application of Source Code Overview (1 minutes)
4. Applying Source Codes (5 minutes)
5. Viewing and Searching on Source Codes (3 minutes)
6. Tracking and Reporting on Source Codes (4 minutes)
7. Q&A (5 minutes)



Source Codes Overview

Source Codes: Track supporter responses and interactions with outreach efforts.

Source codes:

- Are unique identifiers applied to records when supporters respond to your forms and outreach efforts with a contribution or interaction.
- Track supporter responses that can later be used for searches and reporting to help you evaluate the effectiveness of your outreach or fundraising efforts.
- Hierarchical and can be configured to nest data accordingly.
- **Source codes** help answer questions like:
 - Where did this contribution/pledge come from?
 - How much money did this direct mail piece raise?
 - What effort caused this supporter to sign up?
 - How much money did we raise in the last 12 months from people who we first acquired via our Google Ads?

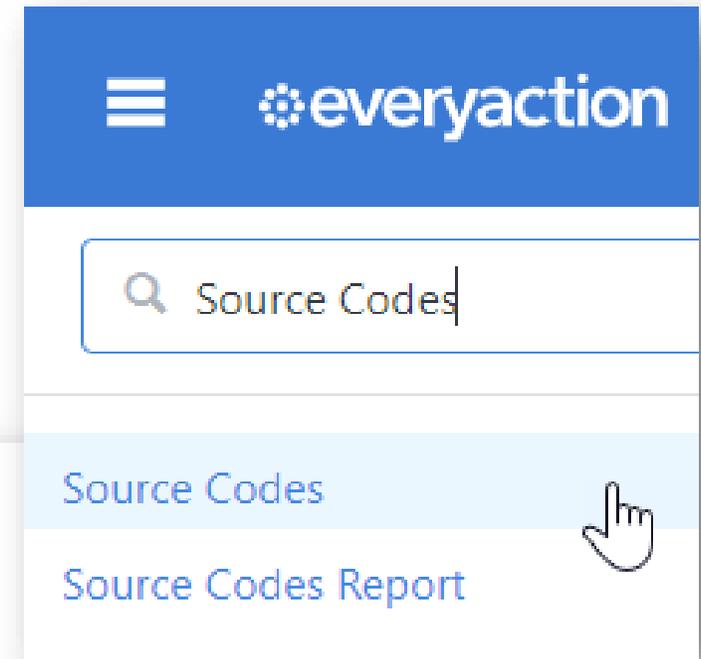
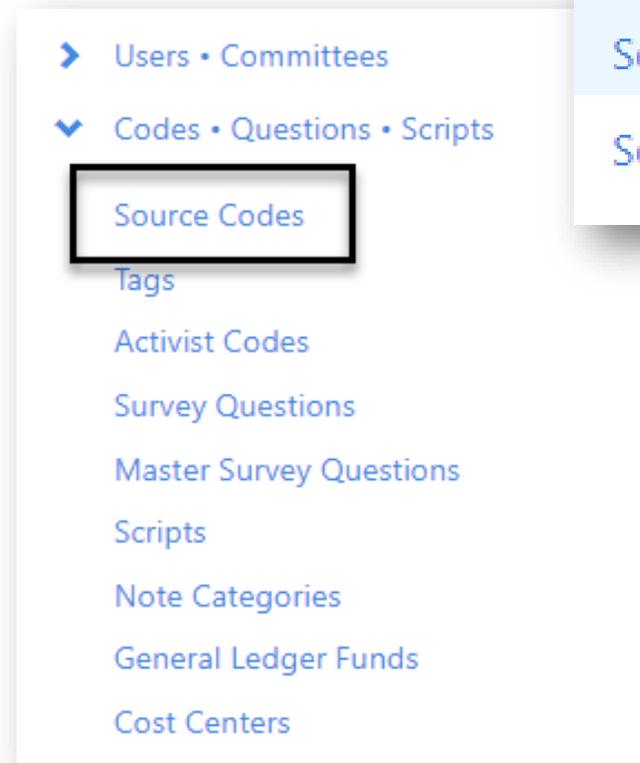


Creating Source Codes

Creating Source Codes

Two ways to navigate to Source Codes:

- Search on **Source Codes** in the **Sidebar**
- Select **Main Menu > Administrative Menu > Codes - Questions - Scripts > Source Codes.**



Creating Source Codes

- Your **Source Codes list page** displays current source codes in hierarchical order. Click on a source code name to edit it. You can select **Add New Source Code** at the top of the section.
- When adding a **Source Code**, you will be asked to enter:
 - Parent Code, Name, Description, and Owner Committee
 - **Tags** to help **Track Your Efforts**
 - Additional settings link your code to a **General Ledger** and **Cost Center**



Source Codes Application Overview

Source Code Applications

When you create a new code, depending on which package your organization has, you can also associate it with a specific:

- Campaign Type & Campaign
- Channel & Contact type
- Revenue Stream
- General Ledger Fund
- Cost Center
- Mail Merge Template

These codes can then be applied to both responses to outreach efforts and also associated with outreach efforts themselves.

You can also add source codes to these types of outreach efforts:

- Online Actions (applies the Source Code automatically to form submissions)
- Direct Response Plans (applies the Source Code automatically to contributions)
- Action Plans
- Moves Management
- Grants
- Call Time Asks

Source codes can also be applied to these types of responses:

- Contributions, including Recurring Commitments
- Pledges
- Disbursements
- Online Actions forms
- Ticketed Events
- Contact records - only as an Origin Source Code

Applying Source Codes

Applying Source Codes to Contributions

Once you've created a source code, it can be added to a contribution from the **Add New Contribution** page. Source codes can also be applied to **Pledges** and **Recurring Commitments**.

Applying a Source Code on financial entities such as a contribution or pledge will auto-populate data, like **General Ledger** and **Cost Center** information, that can be edited manually.

CONTRIBUTION

Add New Contribution

Contributor Abigail Adams

Designation* (Does not work) dev08 OA Automation Credit Gateway

Date Received* 9/20/23

Amount* 0.00

Source Code Split

General Ledger Fund

Cost Center

Extended Source Code

Add New Pledge for Abigail Adams

Pledge Details

Designation* (Does not work) dev08 OA Automation C

Pledge Date* 9/20/23

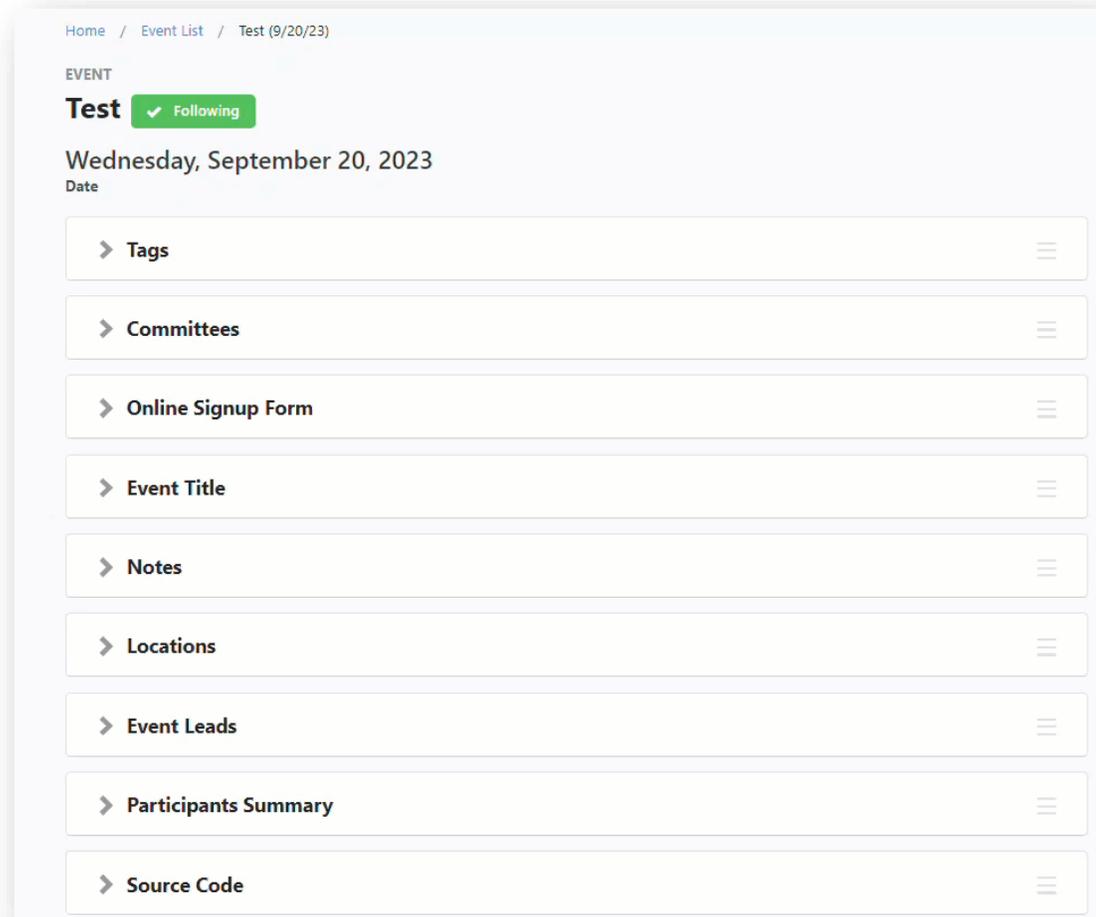
Amount Pledged* 0.00 Unknown

Source Code

Applying Source Codes to Events

You can add any of your codes from the Source Codes page section on the **Events details page**.

Once your **Event** has been created, you can scroll down from the Event details page to **add and remove Source Codes**.



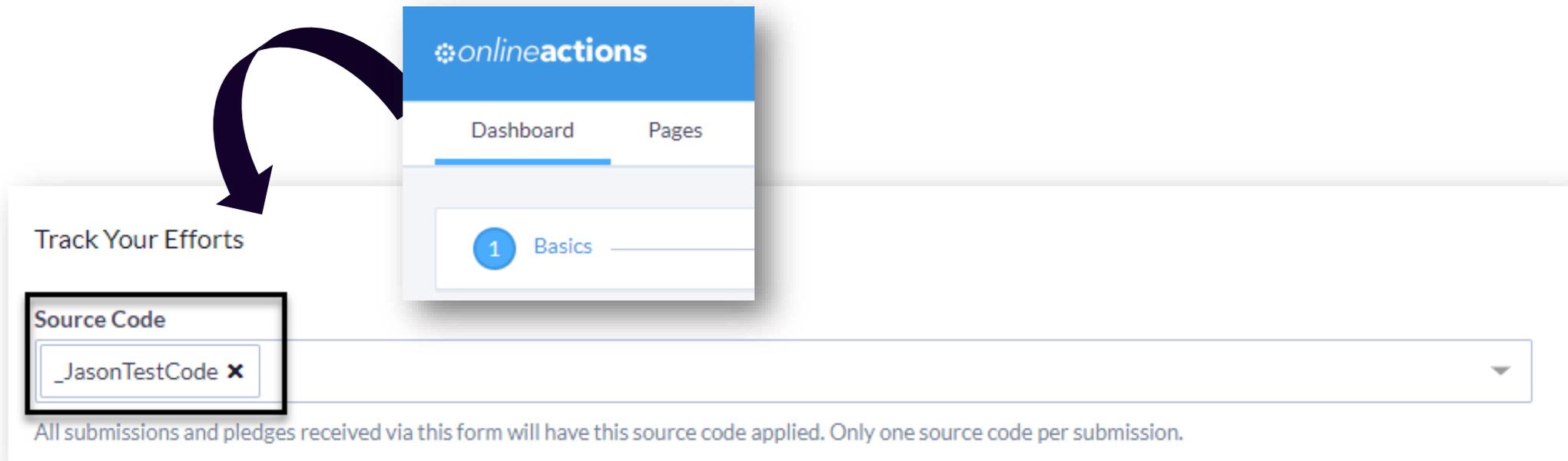
The screenshot shows the 'EVENT' details page for an event named 'Test'. The breadcrumb navigation at the top reads 'Home / Event List / Test (9/20/23)'. Below the event name, there is a green status indicator 'Following' with a checkmark. The event date is 'Wednesday, September 20, 2023'. A list of sections is displayed, each with a right-pointing chevron and a hamburger menu icon on the right:

- Tags
- Committees
- Online Signup Form
- Event Title
- Notes
- Locations
- Event Leads
- Participants Summary
- Source Code

Applying Source Codes to Online Actions Forms

A default source code can be applied to an **Online Actions** form in the **Track Your Efforts** section under **Basics** when creating your form.

Only one source code can be applied to a form and multiple forms can share the same code.



The image shows a screenshot of the 'onlineactions' dashboard. The dashboard has a blue header with the 'onlineactions' logo and two tabs: 'Dashboard' and 'Pages'. Below the tabs, there is a section labeled '1 Basics'. A large dark blue arrow points from the 'Basics' section to a 'Track Your Efforts' form. The form has a 'Source Code' field with a dropdown menu showing '_JasonTestCode' and a close button 'x'. Below the field, there is a note: 'All submissions and pledges received via this form will have this source code applied. Only one source code per submission.'

Applying Source Codes in Targeted Email

Apply a source code to the links in your **Targeted Email** from the **Compose Message** section.

Use **Track Your Efforts** to automatically add a query string to the links in your email that will append tracking information to the form submissions.

Applying a source code in this step overwrites whatever the default code is for your **Online Actions** form.

The image shows a screenshot of the Targeted Email interface. On the left, the 'Track Your Efforts' section is visible, featuring a heading, a descriptive paragraph, and a button labeled 'Add Query String Parameter'. Below this is a table with two columns: 'Name' and 'Value'. The 'Name' column contains 'Source Code', and the 'Value' column contains '_JasonTestCode'. On the right, a progress bar for the 'targetedemail' interface shows four steps: 'Dashboard', 'Emails', 'Triggered Emails', and 'Content Library'. The 'Compose Message' step is currently active, indicated by a blue circle with the number '2' and a checkmark icon. A large blue arrow points from the 'Compose Message' step towards the 'Track Your Efforts' section.

| Name | Value |
|-------------|----------------|
| Source Code | _JasonTestCode |

Viewing and Searching on Source Codes

Viewing Source Codes Usage

The details page for your source code will tell you more about how and where it is being used. From the **Sidebar**, open **Admin > Source Codes** to see the list of all your codes.

Select the source code you want to view by selecting the **Name** from the list. At the bottom of the details page, you will see a section for **Usage** that will indicate how many times it has been referenced in your plans, forms, and records.

Usage

| | |
|--------------------------|-------------|
| Action Plans | 35 |
| Contributions | 1003 |
| Direct Response Plans | 5 |
| Disbursements | 2 |
| Events | 10 |
| Online Form Submissions | 111 |
| Origin Source Codes | 12 |
| Planned Gifts | 2 |
| Pledges | 10 |
| Recurring Commitments | 38 |
| Total Occurrences | 1228 |

Viewing Source Codes on the Contact Record

- You can see the source codes associated with a particular contact record from the **All Details** section of the contact record.
- From the **Contribution** section of the contact details page, you can see the source codes associated with each contribution made by your donor.

| ▼ Contributions | | | | | | |
|-----------------|---------|----------------------|--------------------------------------|---------|-------------|----------------------|
| Date | Amount | | Designation | Status | Method | Source Code |
| 8/20/20 | \$50.00 | View | People For Good D... | Pending | Credit Card | DoMoreGoodAd |
| 7/13/20 | \$50.00 | View | People For Good D... | Settled | Check | 2020 New Online S... |
| 6/12/20 | \$50.00 | View | People For Good D... | Settled | Check | Fundraiser for Go... |

[Add New Contribution](#) [Send Year-End Gift Receipt](#)

Viewing Source Codes on the Contact Record

In the **Direct Response Efforts** section, you can view the source codes associated with the efforts that included your contact.

| ▼ Direct Response Efforts | | | |
|----------------------------|-------------------|----------------------|-------------|
| Effort Name | Source Code | Extended Source Code | Effort Date |
| Spring Call 2020 | Merged SC | | 5/5/20 |
| Spring Mailer 2020 | AutogeneratedB001 | | 5/4/20 |
| Garden Booster Spring 2020 | GBQ22020 | POIUYTF | 4/21/20 |

Viewing Source Codes on the Contact Record

If your contact acted via an **Online Actions** form, you will see the source codes associated with those forms in the **Online Forms** section.

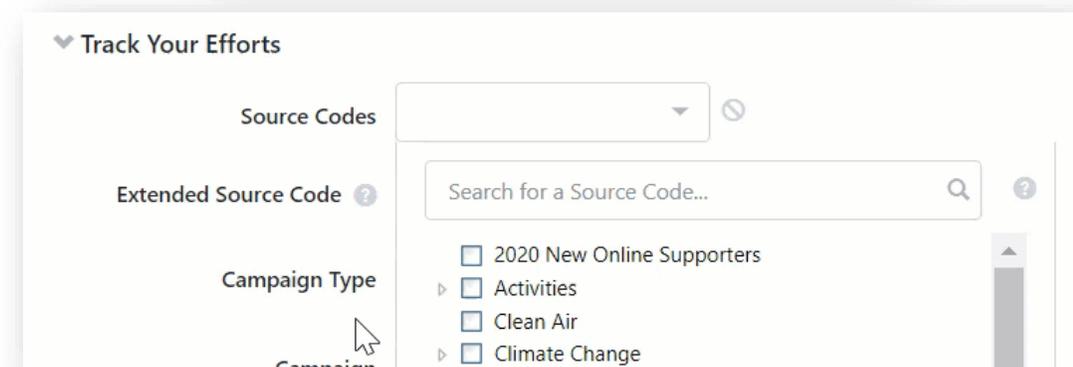
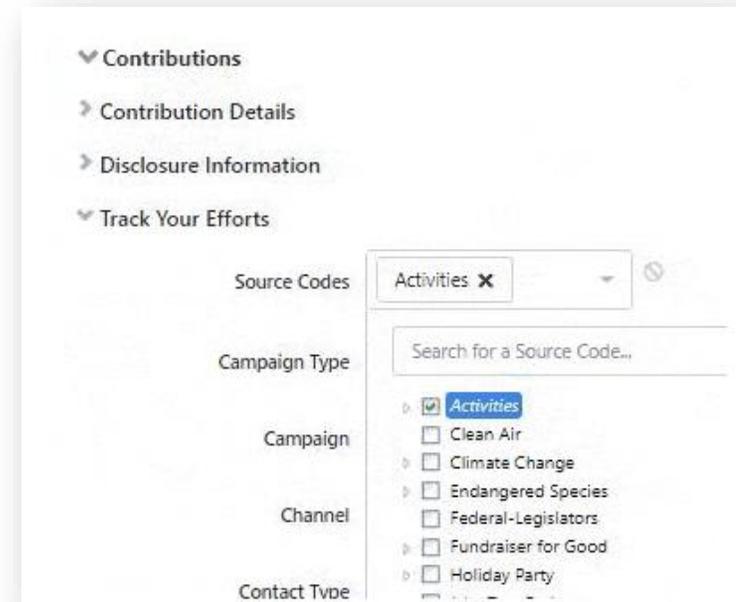
| ▼ Online Forms | | | | | |
|------------------------|-------------------|-----------------|-----------------|---------------|-------------|
| Form Name | Type | Committee | Source Code | Market Source | Referred By |
| Fight Childhood Asthma | Contribution Form | People for Good | Clean Air | | |
| Join Us | Contribution Form | People for Good | Donate Now Page | | |

Searching on Contribution Source Codes

Selecting a source code in the **Contributions** section of **Create a List** will return all contact records with a contribution that has that source code associated with it. You can choose multiple source codes if you wish to expand your search to contributions from more than one campaign or effort.

You can use a wildcard character (% or *) to filter on a broader range of source codes. Wildcards let you dynamically select all current and future children of a parent source code for creating things like **Saved Searches**.

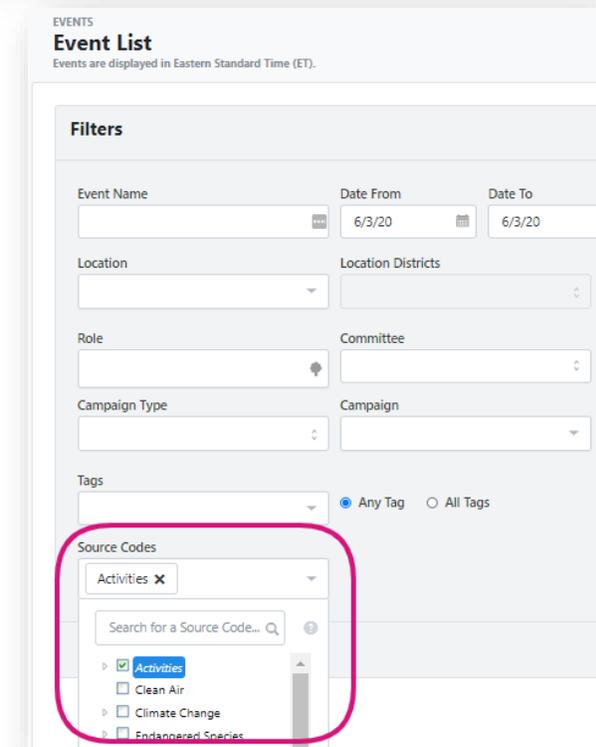
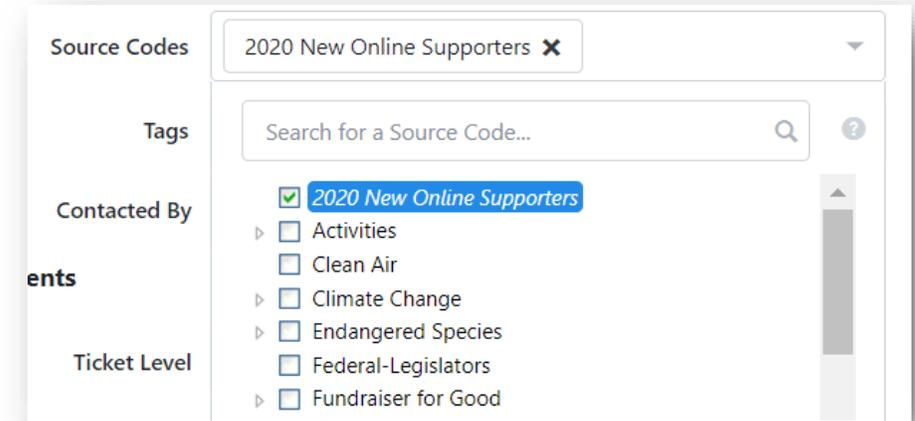
Source codes automatically created from query string links to your forms will appear under the parent code **Forms Autogenerated**.



Searching on Event Source Codes

To find all contacts that attended your events as a result of a particular outreach effort, you can search on **Source Codes** from the **Events** section of **Create a List**. You can then select either one or multiple codes from the dropdown menu or use a wildcard character as above to select a broader range of source codes.

If you want a list of all the events associated with a particular source code, you can filter the **Event List** page using one or more source codes.



Searching on Source Codes from Online Actions Form Submissions

To find all contacts who responded to an **Online Action** form using the same source code, select **Source Codes** from the **Online Forms** section of **Create a List**.

You can select from the dropdown list or manually enter characters to search or add a wildcard to expand your search to related source codes.

The screenshot shows the 'Online Forms' filter interface. The 'Source Codes' field is highlighted with a pink arrow, indicating the selection of '2020 New Online Supporters'. The dropdown menu for 'Source Codes' is open, showing a search bar and a list of options: '2020 New Online Supporters' (checked), 'Activities', 'Clean Air', and 'Climate Change'. Other filters include 'Committee' (People for Good), 'Form Type', 'Form Name', 'Date From', and 'Referred By'.

Tracking and Reporting on Source Codes

Tracking on Source Codes

The **Origin Source Code** is a special kind of source code that is automatically added to a contact's record the first time they respond to one of your outreach efforts. Whichever source code was associated with the form or outreach effort they responded to is assigned to their contact record and can later be used to identify supporters who first took action during specific campaigns.

From the contact details page, open the **Origin Source Code** section to see which source code was applied when they first responded to your outreach efforts.

You can also search in **Create a List** using the **Origin Source Code** section to find everyone associated with a particular **Origin Source Code**. You can choose multiple source codes to widen your search.

▼ **Origin Source Code**

| | |
|--------------|------------------|
| Origin Code | 2018 Annual Gala |
| Date | 7/10/18 |
| Campaign | 2018 Annual Fund |
| Channel | Direct Mail |
| Contact Type | Community Donor |

▼ **Origin Source Code**

Source Code

Date

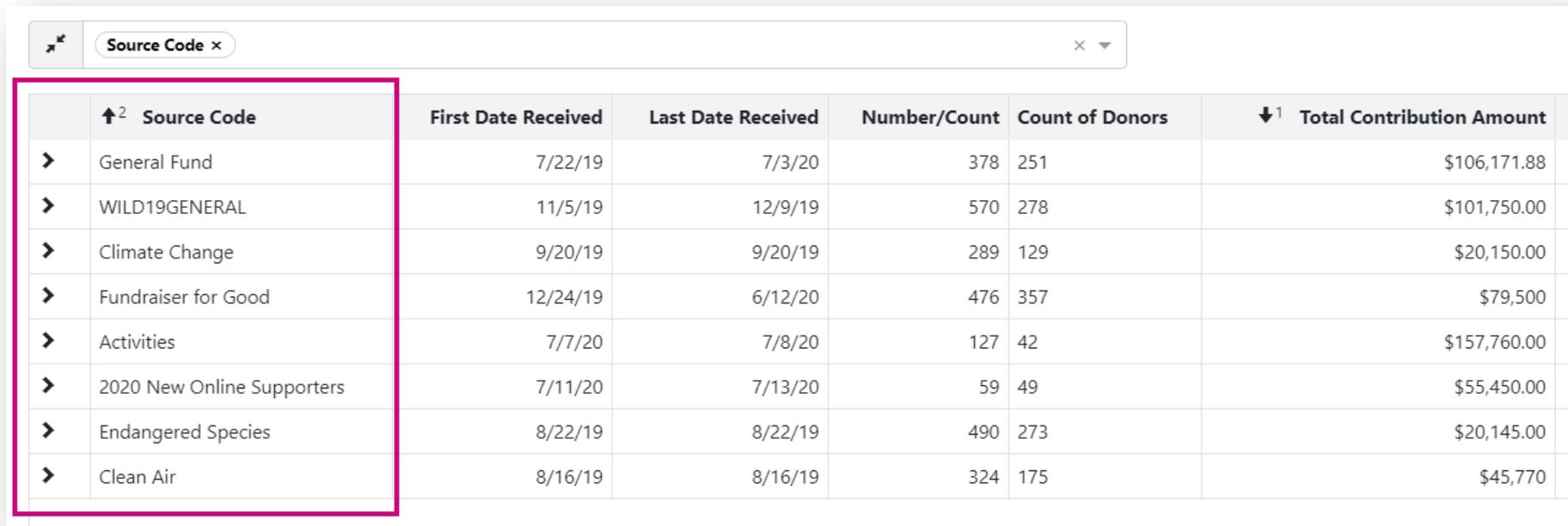
Build Reports with Source Codes

Source codes can be added as an option to view on feature-specific reports. For example, on the **Contribution Report**, source codes can be added to denote the source of individual contributions.

| Contribution ID | VANID | Contact Name | Date Received | Amount | Source Code | Designation |
|-----------------|-----------|--------------------------------|---------------|---------|----------------------------|-----------------------------|
| 6714191 | 109353564 | Rodriguez, Eva | 7/13/20 | \$50.00 | 2020 New Online Supporters | People For Good Designation |
| 6709864 | 100003683 | Haunold, Ernie | 7/11/20 | \$5.00 | 2020 New Online Supporters | People for Good 2 (main) |
| 6698096 | 108002717 | Chow, Heidi | 7/8/20 | \$60.00 | Activities | People For Good Designation |
| 6697065 | 104655658 | George, Marley | 7/7/20 | \$10.00 | Activities | People For Good Designation |
| 6689889 | 108058305 | Dunne, Jane | 7/7/20 | \$12.00 | Activities | People For Good Designation |

Build Reports with Source Codes

Source codes can also be used as a **Group By** option on reports. For example, on the **Contribution Report**, source codes can be used to group **Contributions** that have had a specific source code associated with them.



| | ↑ ² Source Code | First Date Received | Last Date Received | Number/Count | Count of Donors | ↓ ¹ Total Contribution Amount |
|---|----------------------------|---------------------|--------------------|--------------|-----------------|--|
| > | General Fund | 7/22/19 | 7/3/20 | 378 | 251 | \$106,171.88 |
| > | WILD19GENERAL | 11/5/19 | 12/9/19 | 570 | 278 | \$101,750.00 |
| > | Climate Change | 9/20/19 | 9/20/19 | 289 | 129 | \$20,150.00 |
| > | Fundraiser for Good | 12/24/19 | 6/12/20 | 476 | 357 | \$79,500 |
| > | Activities | 7/7/20 | 7/8/20 | 127 | 42 | \$157,760.00 |
| > | 2020 New Online Supporters | 7/11/20 | 7/13/20 | 59 | 49 | \$55,450.00 |
| > | Endangered Species | 8/22/19 | 8/22/19 | 490 | 273 | \$20,145.00 |
| > | Clean Air | 8/16/19 | 8/16/19 | 324 | 175 | \$45,770 |

Q & A



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



Help Center Resources

- [Overview: Source Codes](#)
- [Create and Apply Source Codes](#)
- [Search and Report on Source Codes](#)
- [Video: EveryAction Source Codes Feature Workshop](#)



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!

