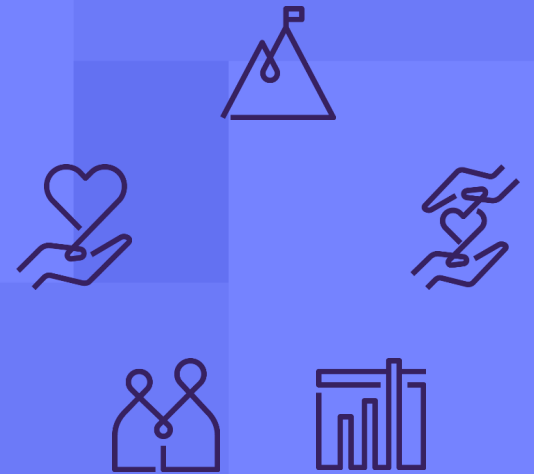


DONOR ENGAGEMENT

Flagging Your Contacts for Segmentation



Meet your Trainer...

Jaime

Training Specialist

Donor Engagement

EveryAction



Agenda

1. Extended Source Codes (2 minutes)
2. Origin Codes (4 minutes)
3. First Contribution Source Codes (2 minutes)
4. Tags (2 minutes)
5. Market Source Codes (3 minutes)
6. Q&A (5 minutes)



Extended Source Code Overview

Extended Source Codes: Available on our Development Pro Packages

Extended Source Codes:

- Further tracks and segments recipients in your direct mail efforts
- Helps to track more granular details about your mailings
- Establish mapping that will automatically track specific values from your codes and displays them as separate columns in your reports
- Established with the help of Client Support

Origin Source Codes

Origin Source Codes

Origin Source Codes:

- First code associated with a contact record within **24 hrs.** of creation
- Associated with a contact record through **Online Actions, Form Submissions, Events, Contributions, or Bulk Upload**
- Viewable in the **Origin Source Code** page section on a **contact record**
- Searchable in the **Origin Source Code** page section in **Create a List**

The screenshot displays a contact record for Abigail Adams (VANID 108163247). The contact management section includes options to Add, Schedule, or view more. The 'Assigned staff' section is empty. The 'Last modified' section shows the record was last modified by 'Online Actions' on April 12, 2022. The 'Category' is 'Disclosure Information'. The 'Origin' section shows the 'Origin source code' as '_JasonTestCode'. The 'Source' is 'Advocacy form'. The 'Date created' and 'Date acquired' are both 'April 12, 2022'. The 'Phones' section shows a phone number '(617) 555-1234' with a star icon for 'Preferred', a disclosure icon for 'Disclosure', and a mobile phone icon for 'Likely Not a Cell • Cell'. The SMS status is 'SMS unknown'. A large blue arrow points from the 'Origin source code' field in the main record to the 'Phones' section in the expanded view.

Manually Adding Origin Source Code

If you need to apply an **Origin Source Code** to a record, you can use the **Quick Mark** feature to easily add the code to a record.

If your committee is set to require an **Origin Source Code** on all contacts, you'll be prompted to include the Origin Source Code when using **Quick Add New Contacts**. If you are also entering a contribution at the same time, the Origin Source Code will instead use the source code for that contribution.

The **Origin Source Code** can also be populated if a source code is applied to a contact record as it's created via **Bulk Upload** or **Bulk Apply**. The mapping option is called **Apply Origin Source Code**.

DATA ENTRY
Quick Mark


Step 1 of 2


What do you want to do?

- Add a Survey Response
- Add an Activist Code
- Add a Contact Result Code
- Archive Mailing Address
- Apply Tag
- Apply Origin Source Code
- Schedule for Event
- Schedule for Event (Using Event Scheduler)

Next

Quick Look Up

 Quick Look Up

 Quick Add New Contact

First Contribution Source Codes

First Contribution Source Codes

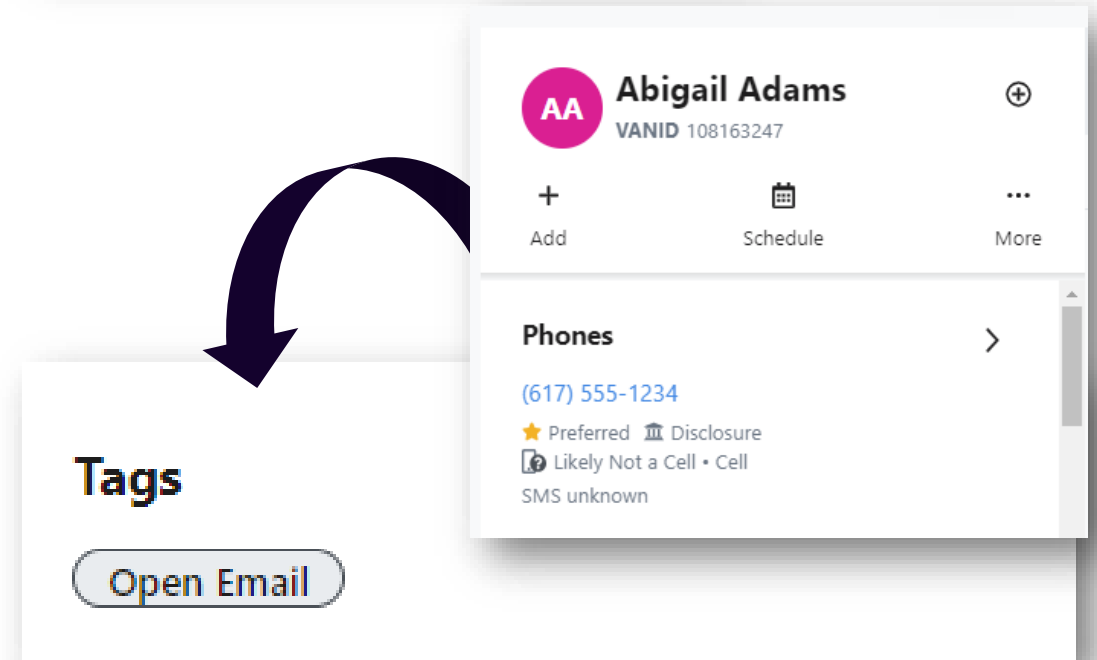
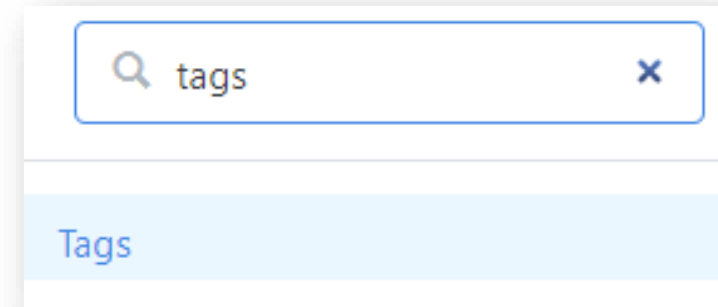
- Automatically apply to a **contact record** the first time a supporter donates
- Applied through a donation resulting from interaction with an **Online Actions Form**
- Can be manually added with a source code or the first time a contribution is recorded with a source code using **Bulk Upload**
- Helping in fundraising because tracking supporter donations from their first contribution can **predict donation patterns** and **help target further outreach efforts**



Tags

Tags

- Designed to work across other types of codes to see how broader efforts are doing
- Overlapping functionality with Activist Codes
- Can be applied to Contact Records, Events, and Locations
- Are hierarchal, and there are no limits to the number that can be created or applied
- Tags can be applied to:
 - Contact records
 - Events
 - Locations



Market Source Codes

Market Source Codes

- Tracks the different channels you use for outreach efforts.
- Query strings added to the end of Online Actions Form URLs
- Tracks outreach efforts on channels such as Facebook, online ads, etc.
- Added to the contact record and can be used to build searches or reports in the same way you would use any Activist Codes or Source Codes

The screenshot shows a web interface for filtering 'Online Forms'. The 'Market Source Codes' field is highlighted with a red rounded rectangle and contains two tags: 'FacebookAd' and 'twitter'. Other fields include 'Include' (set to 'Include'), 'Committee' (set to 'People for Good Demo - Sales'), 'Campaign Type', 'Campaign', 'Form Type', 'Form Name', 'Date From' (set to '--Select a Date Range Type--'), and 'Source Codes'.

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

- [How to: Use Extended Source Codes](#)
- [How to: Search and report on source codes](#)
- [Fundamentals: Understanding Codes](#)
- [How to: Add and use Tags](#)
- [How to: Use Market Source Codes](#)



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!

