DONOR ENGAGEMENT

Getting Started with EveryAction

Bonterra™

Meet your Trainer...

Ryan Sauve

Training Specialist

Donor Engagement

EveryAction

Bonterra

Agenda

1. Accessing the Database with ActionID
2. Introduction to EveryAction
3. Database Feature Overview
4. Accessing Resources and Support
5. Q&A

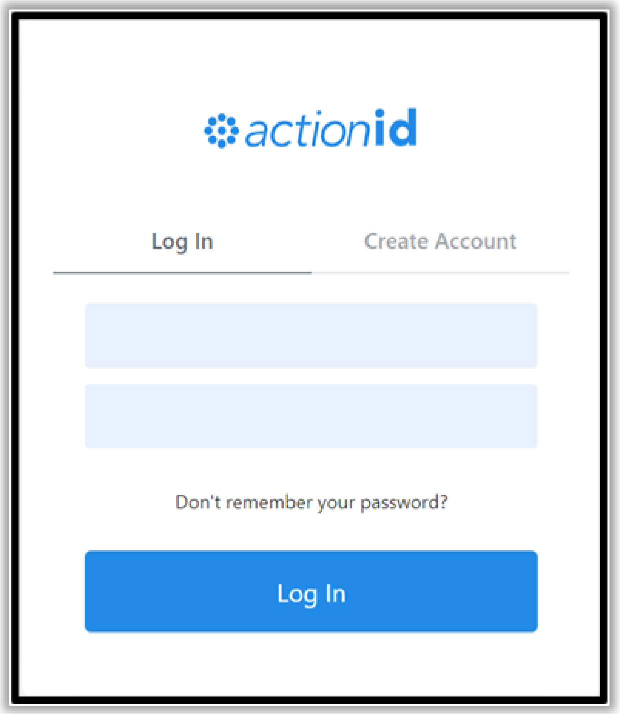
Bonterra

User Access for the Database with ActionID

Bonterra™

Understanding the ActionID

ActionID is your login credential that consists of your email address and a password. This is what you use to log into your database



Logging into Multiple Accounts

If you have more than one User Account, your ActionID can be linked to all of your User Accounts, making for easy switching between your User Accounts on the same platform.

If you are working for or volunteering with multiple organizations, you may need to log in at different URLs.

Helpful Hint! To streamline access to your organization(s) login site, bookmark the web address provided in your login email.

Understanding the ActionID

Using ActionIDs for your volunteers gives your most loyal supporters access to information in the database that you designate. Volunteers can even enter information based on their reporting and roles!

Using ActionID for Volunteers

Some campaigns or organizations manage many volunteers. In cases where volunteers are making phone calls or knocking doors, ActionID can be very helpful in saving time for staff and making it easier for supporters to volunteer.

You can send out an invitation to volunteers, who create their own ActionID to make calls or knock on doors.

People with an ActionID that do not have access to the database itself (i.e. they don't have a User Account) are called Public Users.

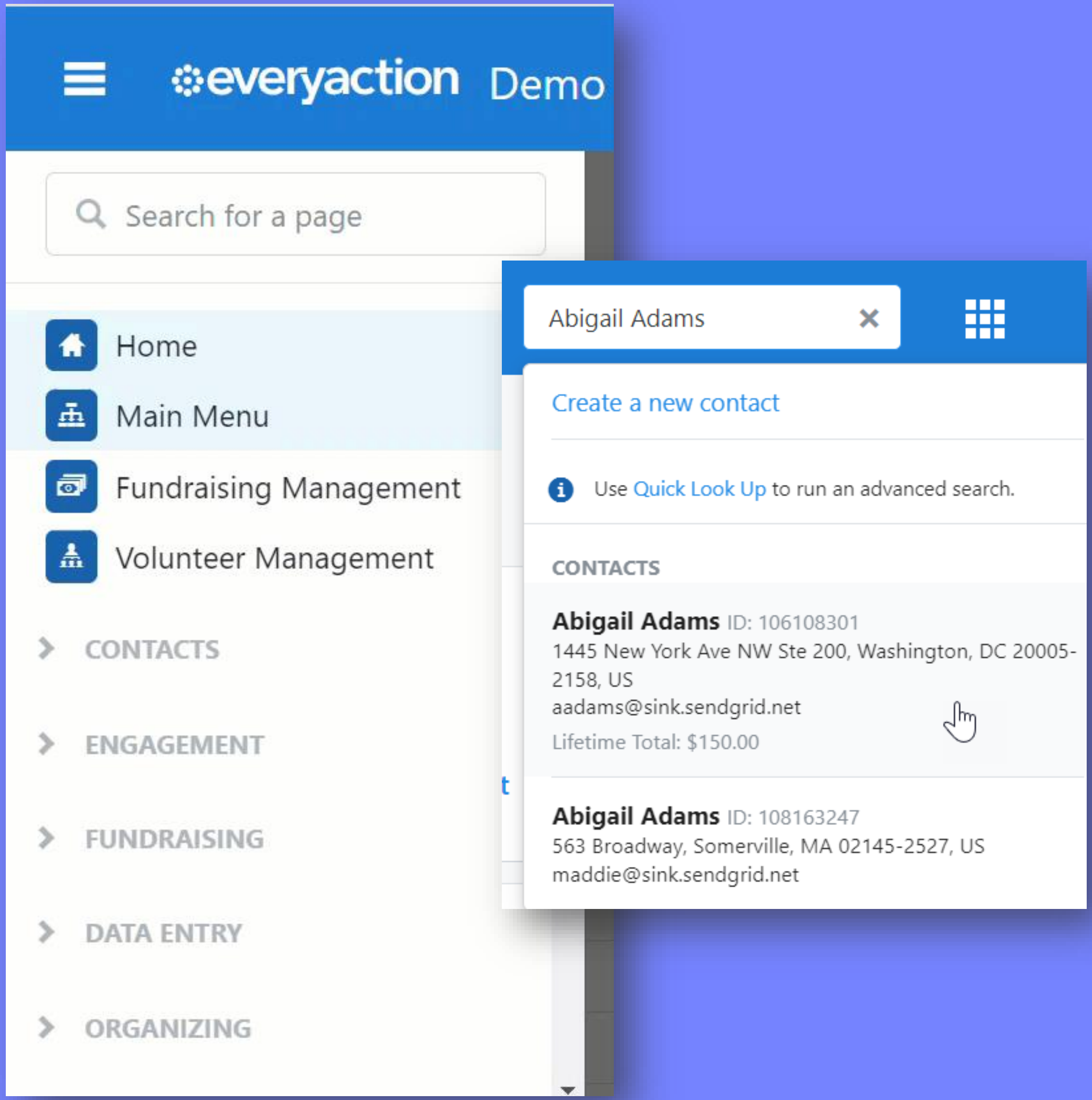
Database Walkthrough

Bonterra™

Left Hand Sidebar Navigation and Search Bar

Using the three-slash "hamburger icon" you can open the **Sidebar.** The **Sidebar** menu:

- Allows you to search for a page from the search field which auto populates as you type
- Gives you quick access to your Home, Main Menu, Fundraising, and Volunteer Management Dashboards
- Uses drawers to host features grouped into like categories for easy location
- Contains drawer categories such as Contacts, Engagement, Fundraising, Data Entry, Organizing, Disclosure, Reporting, Help & Support, and Admin
- Contact Record Search in upper right



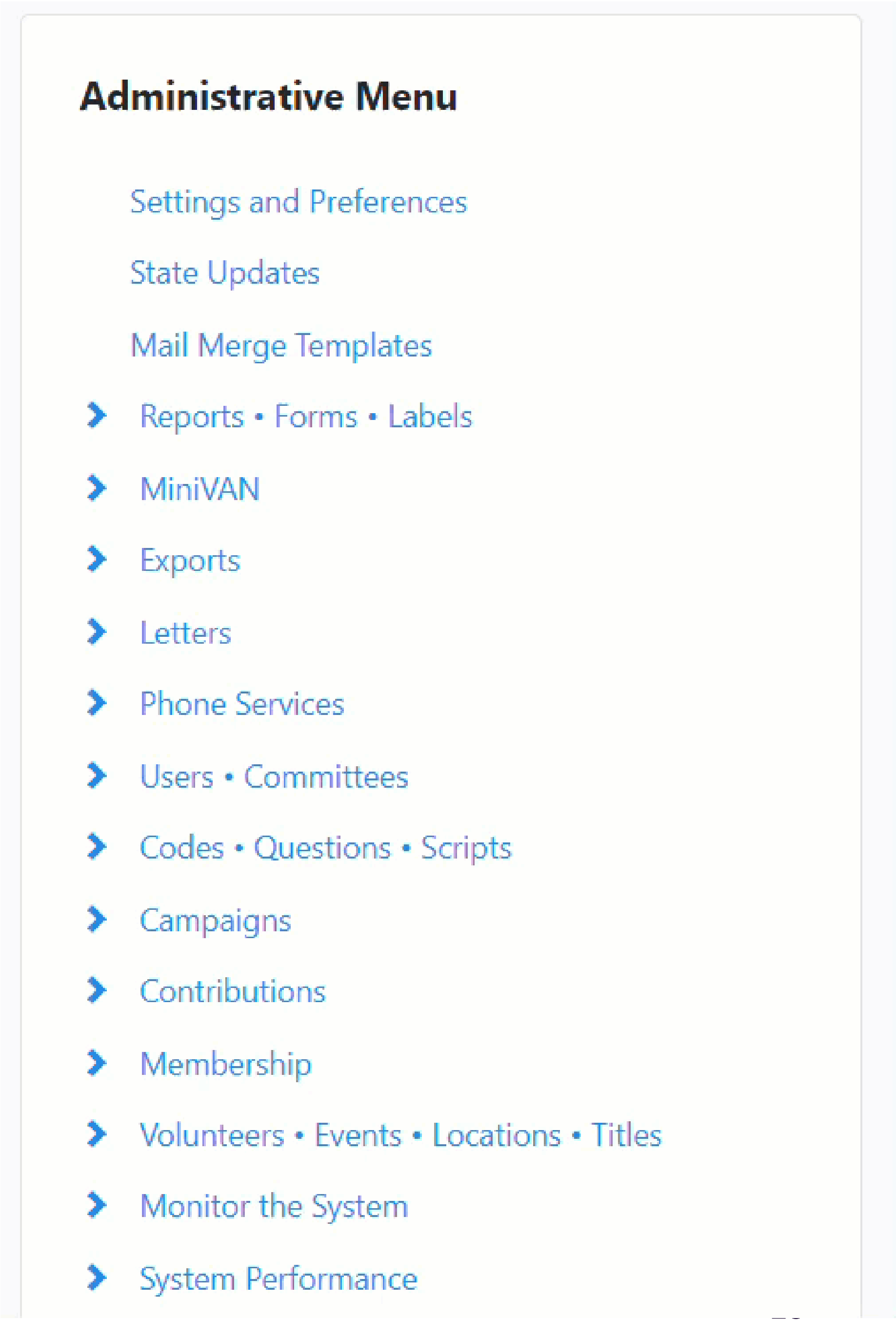
Bonterra

Main Page>Left: Administrative Tools

The **Administrative Menu** groups together your functions and features that allow you to run specific administrative actions, such as:

- Creating and assigning User Profiles
- Creating Users and linking access permissions
- Monitoring system data
- Setting system preferences
- Perform top-down function such as assigning management tasks

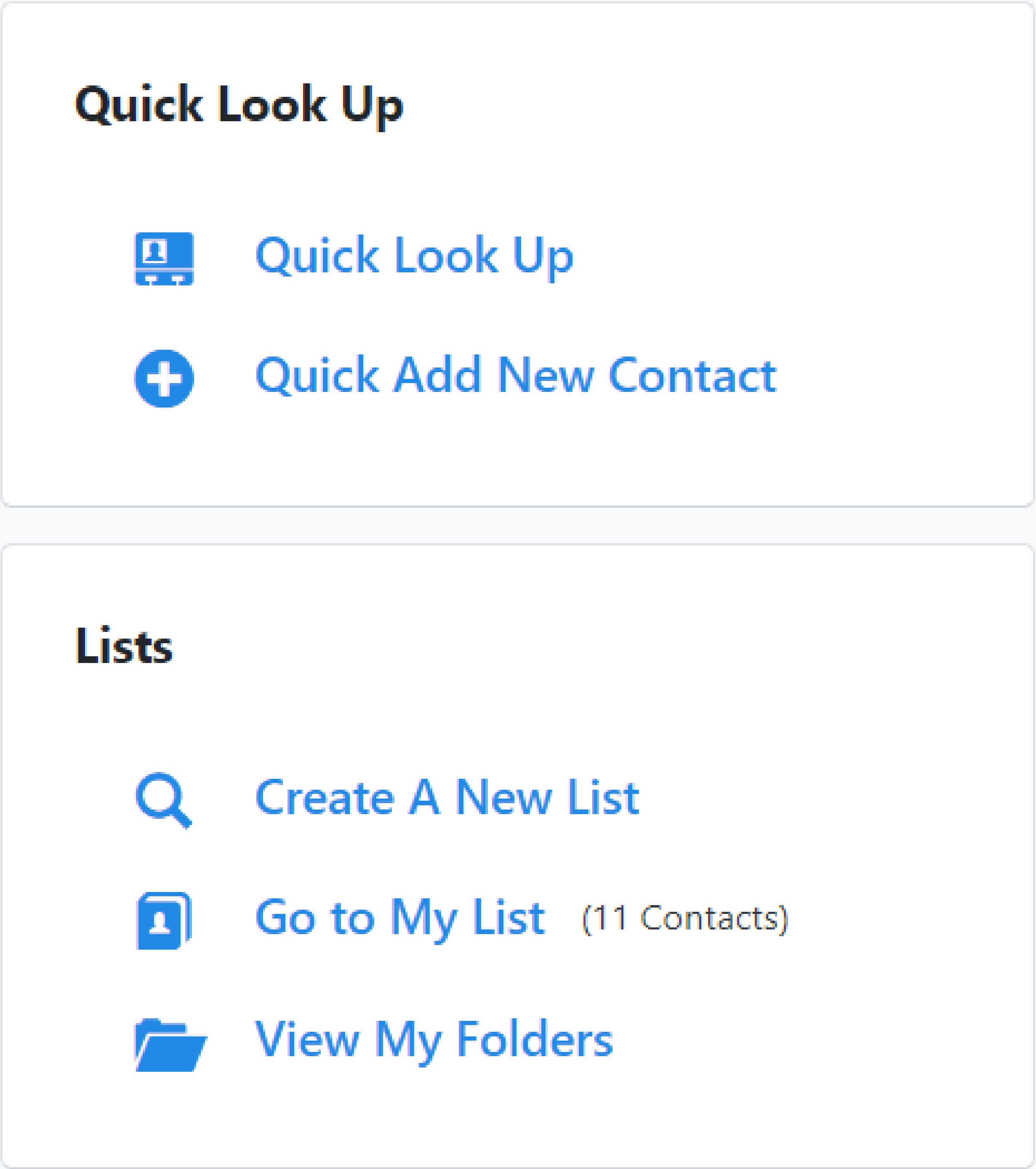
Remember that Administrative menus vary depending on the package that your organization has selected.



Main Page>Middle: Finding and Searching Records

From the Middle section of the Main Page, you will find:

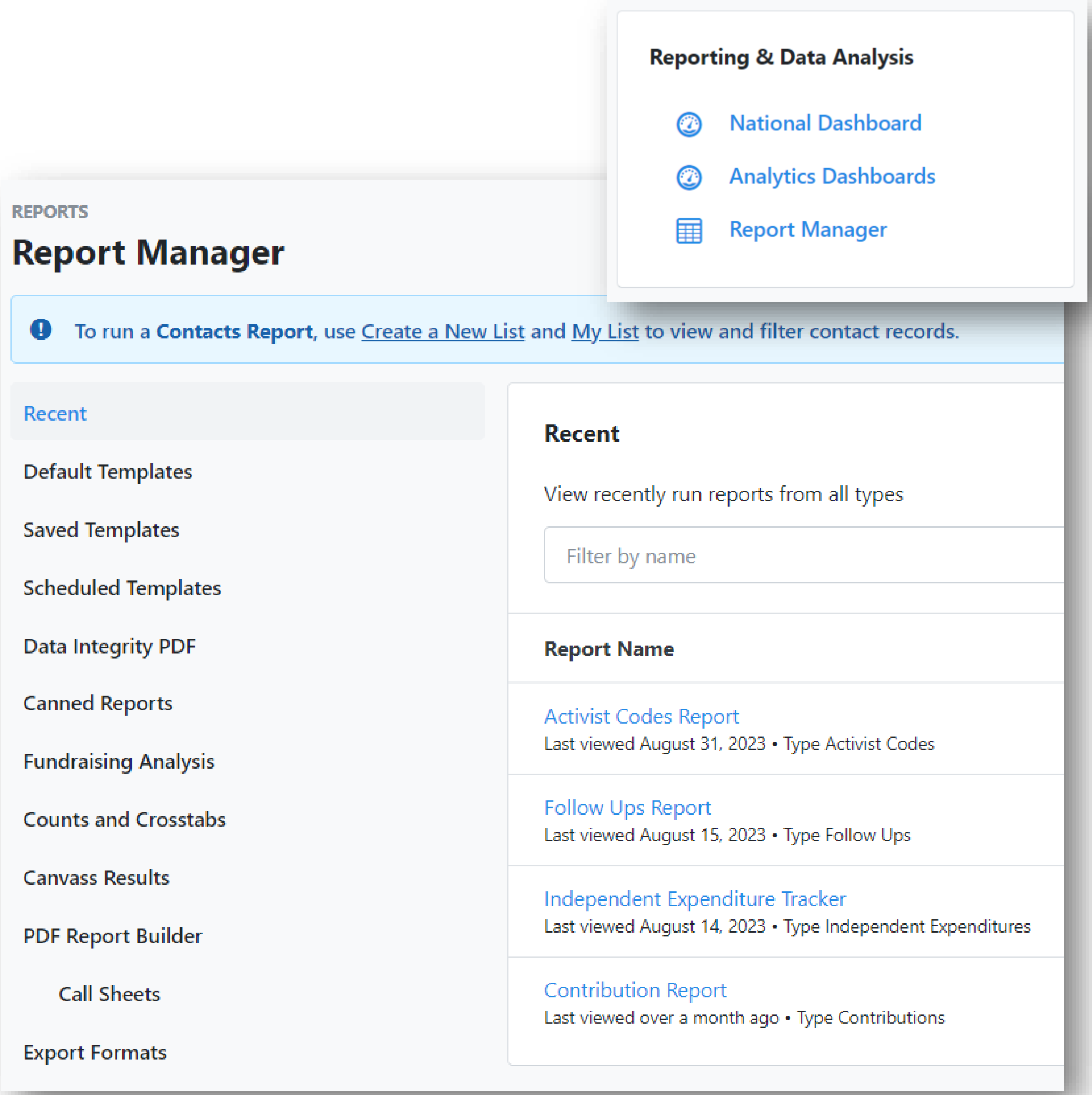
- Tools to look up individual records using the **Quick Look Up (QLU)** Tool
- **Quick Add** features to upload a new contact record
- **Create A List (CAL)** which creates lists based on several identifiers for groups of contact records
- **My List** for any saved lists that you have populated
- **My Folders** where you would house organized lists based on your preferences



Main Page>Middle: Data Analysis and Reports

From the Middle section of the Main Page, you will find:

- **National Dashboard** to see the effects of initiatives and their performances
- Customizable **Analytics Dashboards** to track your most requested or needed information
- **Report Manger**-Your one stop location for finding and managing data such as:
  - Activist Code Report
  - Follow Ups Report
  - Expenditure Tracker
  - Contribution Report

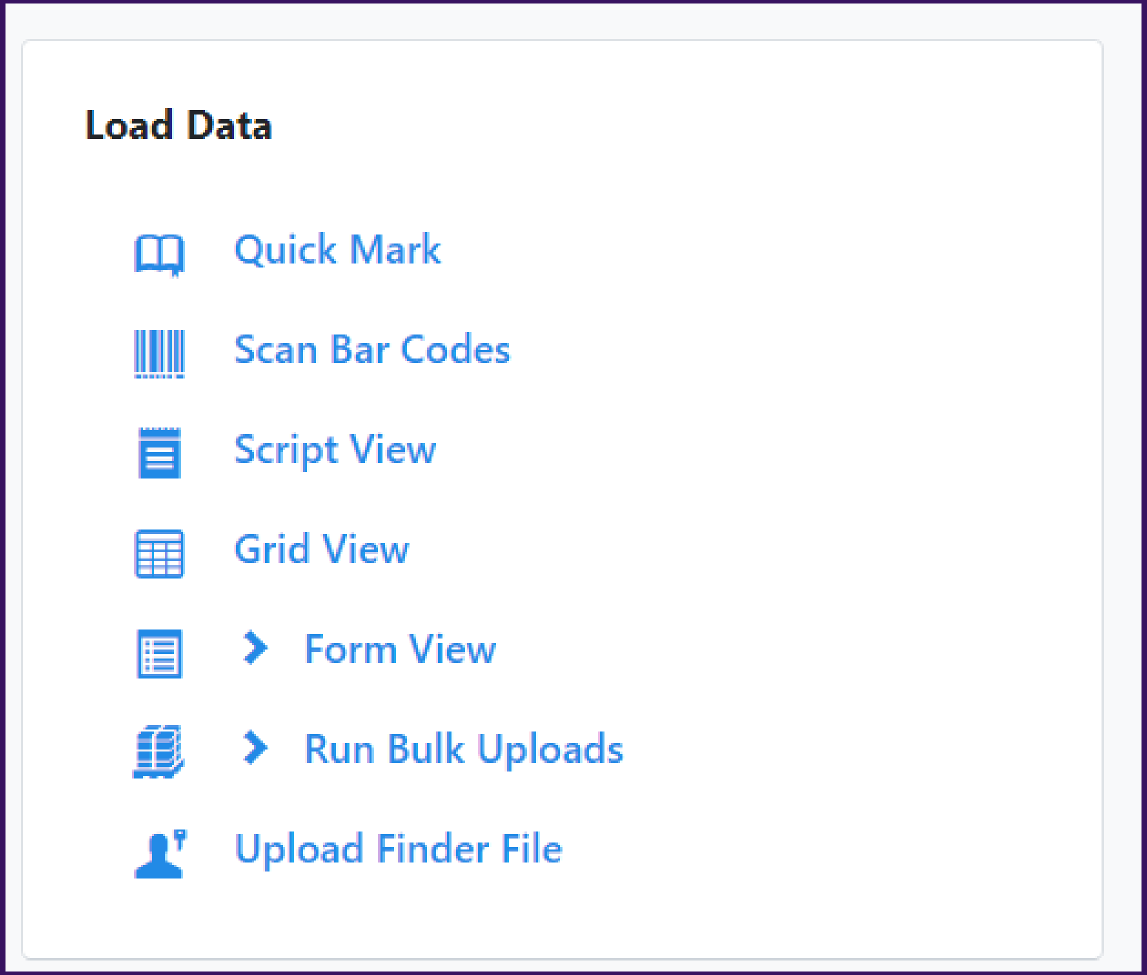


Bonterra

Main Page>Right: Data Entry

From the Right section of the Main Page, you will find:

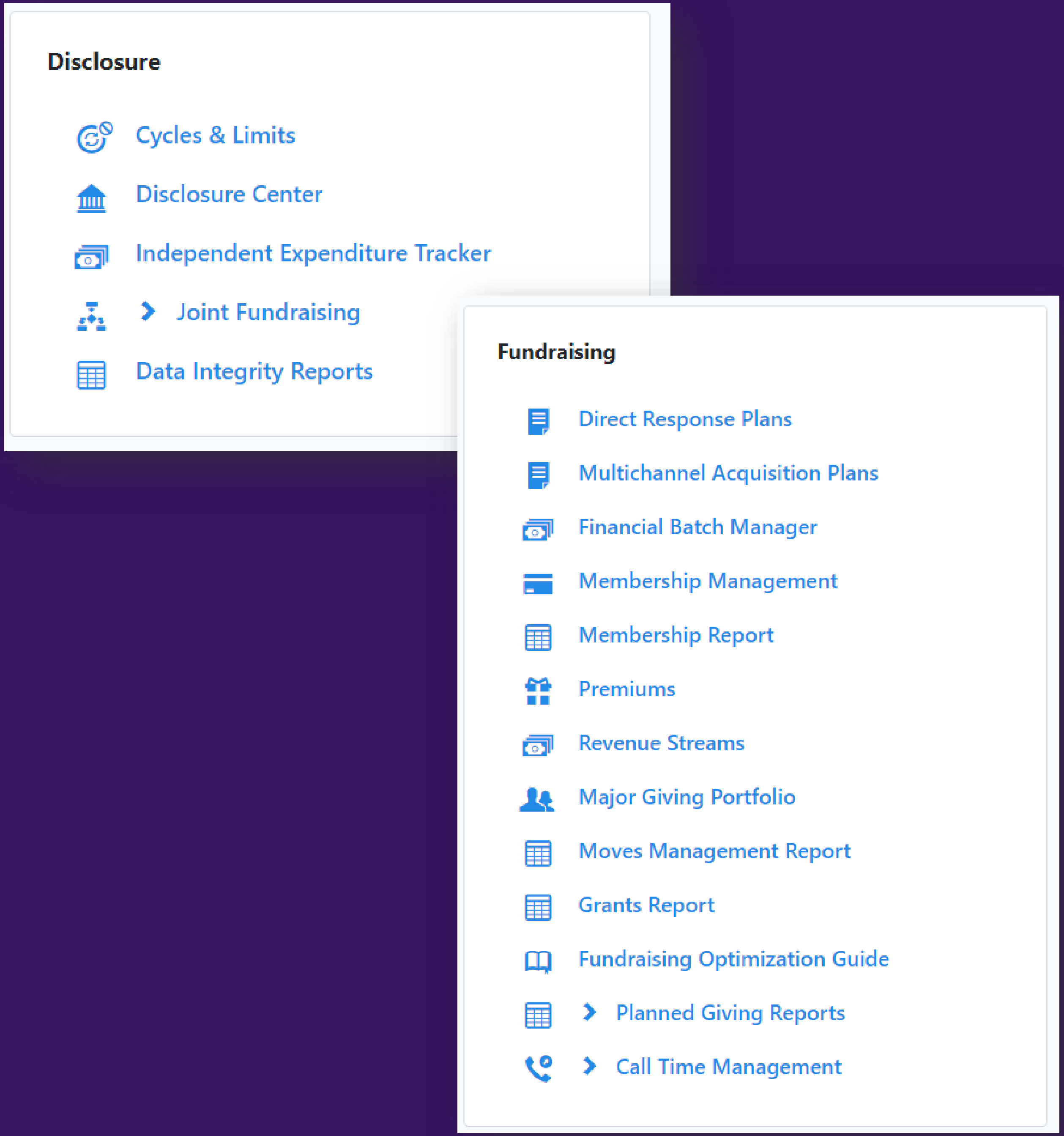
- **Data Entry** measurements that make your data management a streamlined process
- Add data using **Quick Mark** to look up a contact and add data on one screen
- **Scan Bar Codes** to add data with a scan
- Load a list to edit using **Script View or Grid View**
- Enter data using custom-built forms
- Upload data from a text file using the **Bulk Upload Wizard**
- Find recent **Bulk Uploads**



Main Page>Right: Disclosures and Fundraising

From the Right section of the Main Page, you will find:

- Your **Disclosure Reporting** section
- A comprehensive **Fundraising tool** section which includes:
  - Direct Response Plans
  - Financial Batch Manager
  - Grants Reports
  - Call Time Management

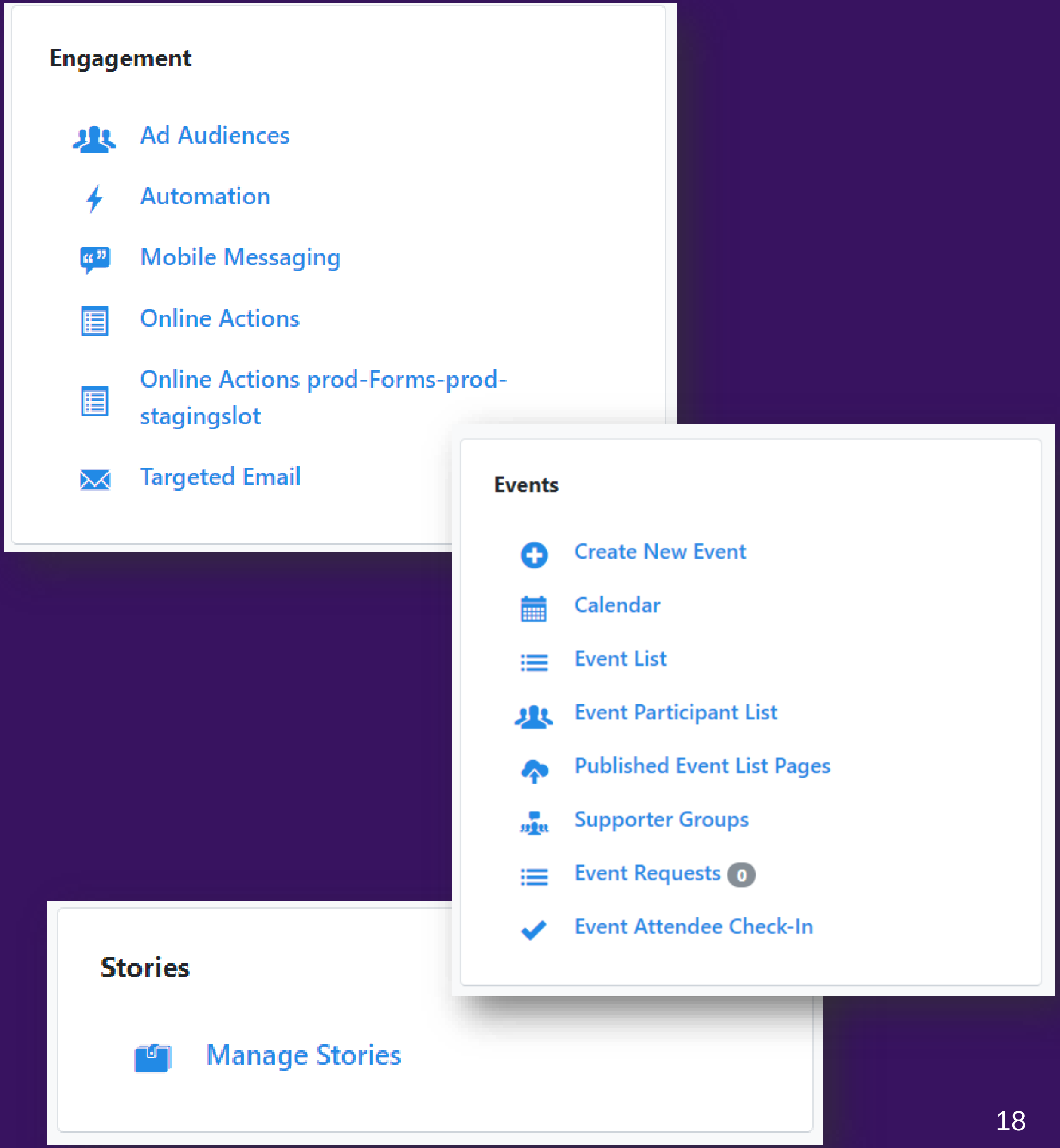


Bonterra

Main Page>Right: Engagement

From the Right section of the Main Page, you will find:

- Engagement tools such as **Targeted Email and Online Actions**
  - Access through the Waffle Icon in the upper right side as well
- Your **Event management** and planning dashboard of tools
- **Stories** to collect testimonies from your contact

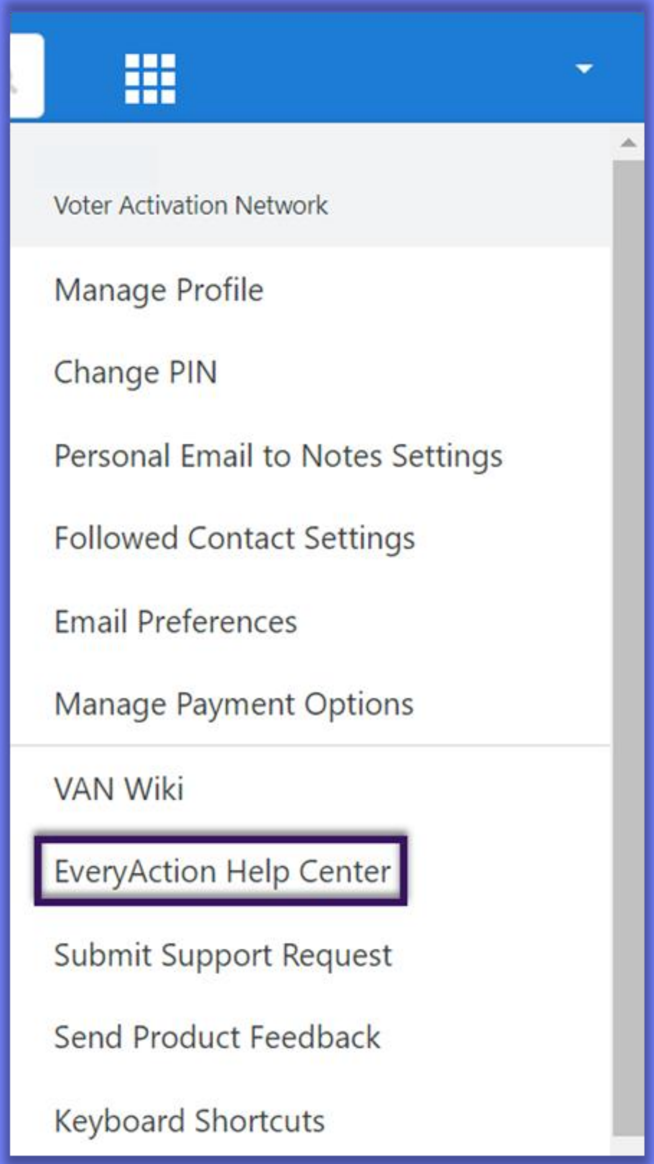


Accessing Resources and Support

Bonterra™

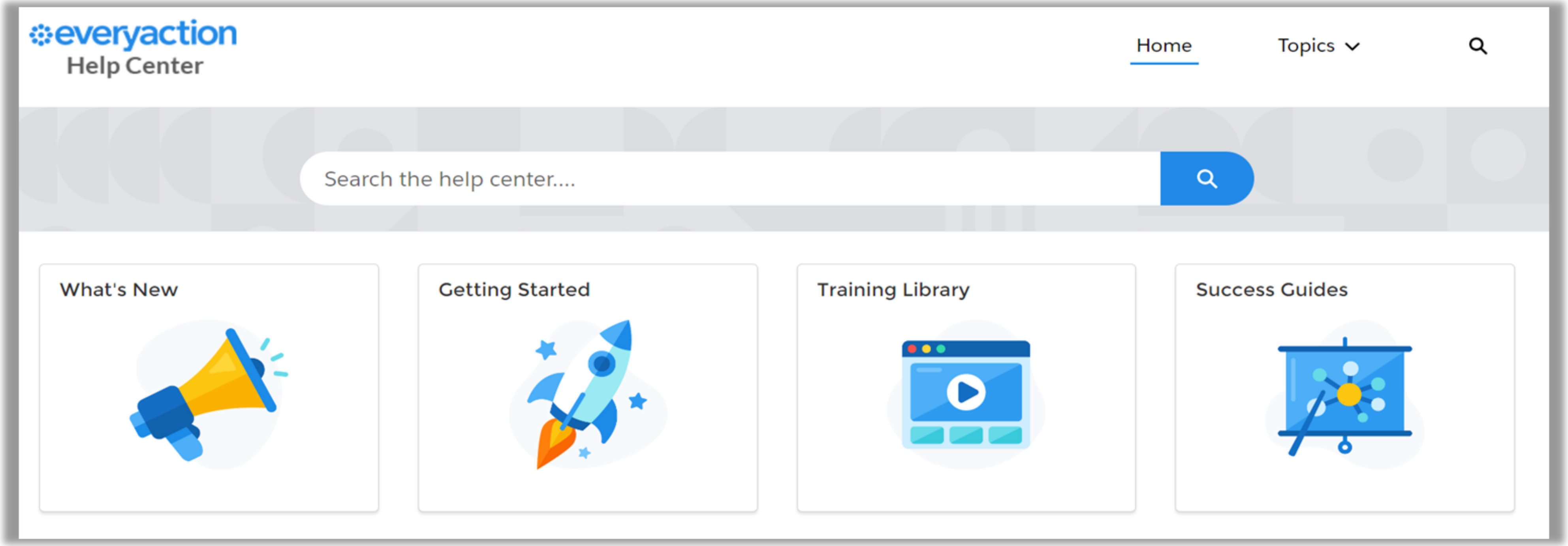
Accessing the Help Center

- To access the Help Center from EveryAction, open the right-hand navigation drop down, open the **EveryAction Help Center**
- You can also access the **Help Center** at https://help.everyaction.com/s/
- If you do not see the Help Center, you may need to adjust your browser's ad blocker setting for our site.



EveryAction Help Center

Help and Training: Training webinar registration and webinar recordings
Extend Your Experience: Feature webinars and help documentation
Product Updates: New feature announcements
Service Announcements: Site maintenance information



Bonterra

Contacting Client Support

Client support is always ready and willing to help!

You can access support by:

Contacting your System Administrator

Emailing help@EveryAction.com

Phone (202) 686-9330

Submitting a Support Request Ticket from the Main Menu of the EveryAction CRM

Before you reach out, please consider these best practices to enable our support team to provide with the highest quality responses!

When reporting an issue to **EveryAction Support**, provide as many details as possible. Include things like:

- The workflow being used
- Examples of relevant contact records
- Names of saved lists or searches
- Usernames (more efficient than first/last name)
- Your organizations name

Q&A

Bonterra™

Additional Resources

Bonterra™

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

Bonterra™

Help Center Resources

- Getting Started with EveryAction
- Welcome to EveryAction!
- Contacting EveryAction Support
- Bonterra Academy-EveryAction 101

Additional Training

- Bonterra Academy: Bonterra Academy Self Signup
  - Foundational Webinar Series
  - Upcoming initiatives
  - Videos in Bonterra Academy

Bonterra

Thank You for Attending!

Bonterra™