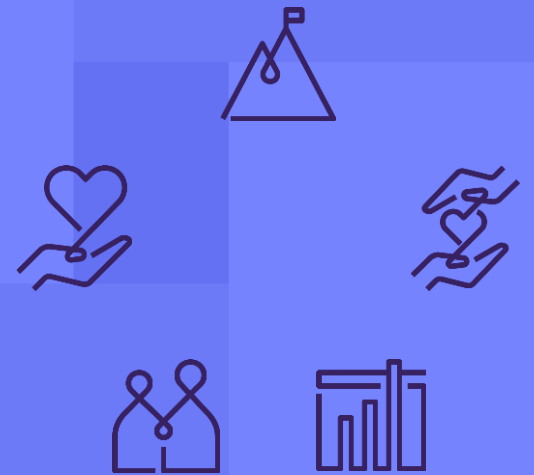


**DONOR ENGAGEMENT**

# Grouping Your Contact Via Activist Codes



# Introduction & Learning Objective

# Meet your Trainer...

Ryan Sauve

Training Specialist

Donor Engagement

EveryAction



# Agenda

# Agenda

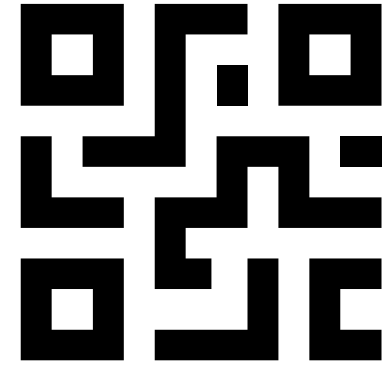
1. Codes Overview (2 minutes)
2. Creating Activist Codes (5 minutes)
3. Manually Adding Codes to Contact Records (3 minutes)
4. Using Online Actions to Apply Activist Codes (3 minutes)
5. Viewing and Searching on Activist Codes (3 minutes)
6. Reporting On and Deleting Activist Codes (3 minutes)
7. Q&A (5 minutes)

# Codes Overview

# Codes Overview:

There are many kinds of codes available to you to help you track your program and segment your contact lists.

Understanding what these codes are and how they are meant to be used can make a huge difference in how easy it will be to get meaningful data from your reports and searches.



There are several types of **codes** available:

- **Activist Codes:** Labels applied to track contact record data
- **Source codes:** Track supporter responses to outreach efforts
- **Extended Source Codes:** DevPro account users can use to track direct mail efforts
- **Origin Source Codes:** Track the first code associated with a contact record
- **First Contribution Codes:** Tracks the first time a supporter donates
- **Tags:** Tracks larger groups across code types
- **Market Source Codes:** Tracks the multiple channels you use for outreach

# Activist Codes Types:

Not everyone with an Activist Code is necessarily an activist in the traditional sense, they can be used to group records based on roles, issues, and interests.

**EveryAction Activist Codes** may differ from other brands as they are commonly used to differentiate between **specific roles and issues** related to a Campaign.

Common examples of Activist Codes for EveryAction might look something like this:

**Role:** Finance Committee Member

**Role:** High-Dollar Donor

**Role:** Press

**Role:** Prospect

**Role:** Union Leader

**Issue:** Racial justice

**Issue:** Jobs

**Issue:** Infrastructure

**Issue:** Education

**Issue:** Environment



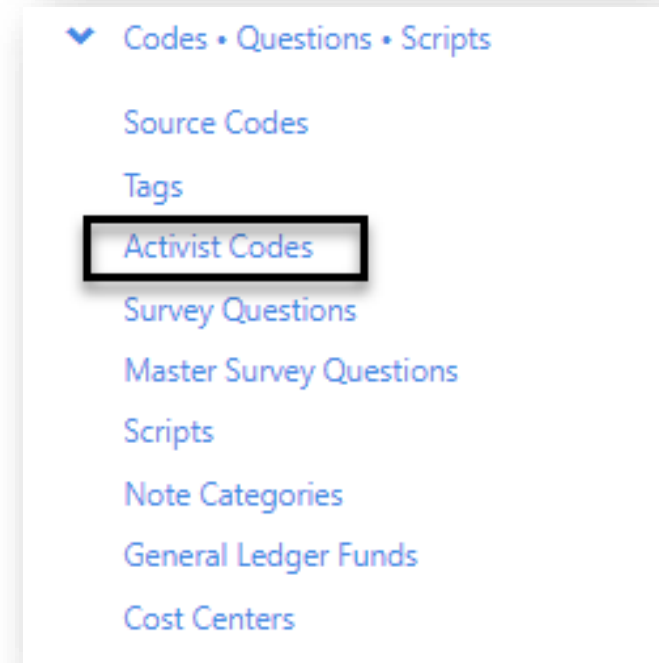
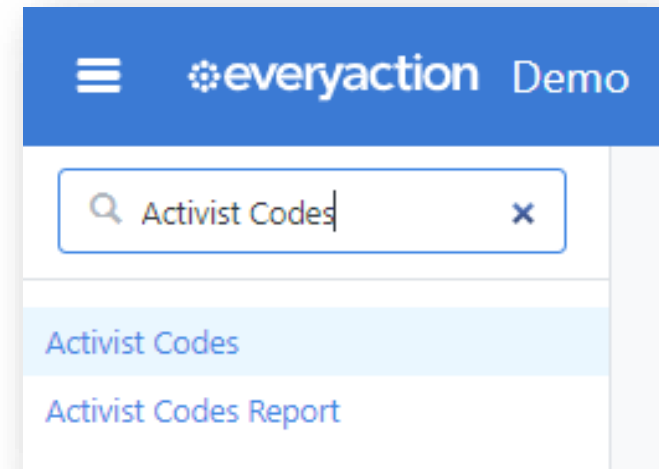
# Activist Codes-Detailed Overview:

- Are searchable labels applied to contact records used to track groups of individuals or organizations that share interests or specific relationships, such as group affiliations, subscriptions, licensures, or memberships.
- Help track donor support, making this feature useful in organizing critical information on contact records.
- Are used to group contact records by like issues individuals care about and ways in which they engage with an organization or campaign. For example, you could have Activist Codes for "Jobs," "Environment," or "Low Dollar Donor" that can help you quickly identify contacts who might be receptive to your outreach effort.
- Are unlimited in the number that can be created or applied to a contact record, and are not hierarchal, meaning no one code supersedes another, which supports referencing.
- Are reported on using the feature Activist Code Reporting that quickly references and manages code information.

# Creating Activist Codes

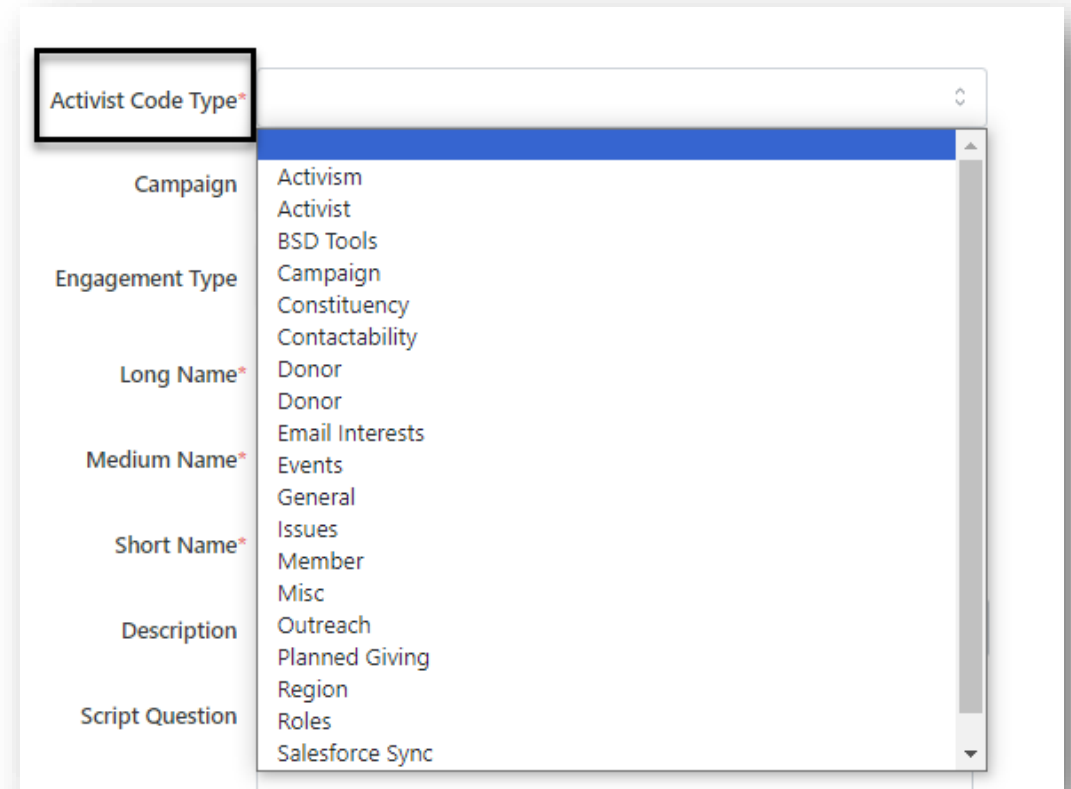
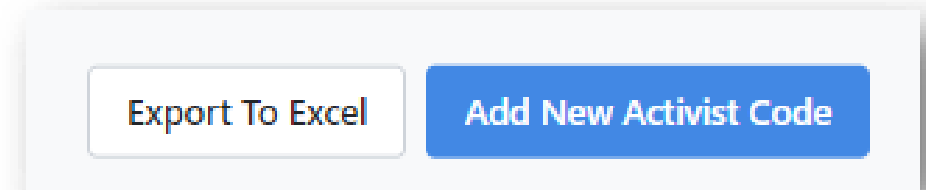
# Creating Activist Codes

- Creating Activist Codes in EveryAction is a process in which a user attaches Activist Codes to a contact record. The choices you have for Activist Codes vary depending on your package and settings.
- Changes to or requests for **Activist Code Types** can be considered upon request to EveryAction Support.
- Locate **Activist Codes** by searching in the **Sidebar**, or using the **Main Menu** to find Activist Codes under **Codes-Questions-Scripts** in the Administration Menu



# Creating Activist Codes

- From the Activist Codes list page, select **Add New Activist Code**
- Choosing your settings (**Selecting Activist Code Type**)
- The choices you have for Activist Codes vary depending on your package and settings. Changes to or requests for Activist Code Types can be considered upon request to the State or Site Administrator.
- Selecting an **Activist Code Type** simplifies sorting and managing your Activist Codes.
  - For example, the Email Interest type is used for subscription purposes. When supporters select unsubscribe in a Targeted Email or update their email on your self-service page, they will be given the option of opting out of all emails or specific lists.



# Creating Activist Codes

- **Choosing Naming Conventions**
  - The system chooses between **Long Name**, **Medium Name**, and **Short Name** based on the fit of a particular display. It displays the Long Name whenever possible, the Medium Name when space is an issue (such as on Reports and Mobile Devices), and the Short Name when space is limited (such as in column headings on Canvass Results).
- **Adding a Description**
  - The **Description** field explains details about the Activist Codes and defines what is meant to be understood about the assigned voter. The description can only be viewed on the Administration page.

Long Name*	Leslie Knope
Medium Name*	L. Knope
Short Name*	LNC

Description	Code used to identify a user who is a volunteer.
-------------	--

# Creating Activist Codes

- **Applying Script Questions**
  - Script Question is an optional feature added to the canvasser's walking or calling Script on MiniVAN (or printed Report) if the user wants to ask voters questions such as "Would you be willing to take a yard sign?"
  - If you have access to Scripts, you can use Activist Codes to create a Script for a Virtual Phone Bank and response tracking.

Script Question

Would you be willing to take a yard sign?

# Creating Activist Codes

Scope  Private  Public

- **Determining Scope**

- Scope determines who can see the records that have the Activist Code assigned to them. This is typically used in organizations that are working with voter files. A public or private Activist Code determines who can see the voters that have the Activist Code assigned to them.
- Applying a **public Activist Code** to a voter allows every user on the site with access to that voter to see the Activist Code.
- Applying a **private Activist Code** to a voter only allows users on the same Committee to see the Activist Code for that voter.

Is Also Activist

- **Understanding Activist Settings**

- While these people will have an Activist Code, there is no reason to assume that they are political activists. Thus, "**Is Also Activist**" distinguishes between people who have this Activist Code and those who are considered true activists on this issue or cause.
- On the Create a List page, a user may select all Activist Codes marked "**Is Also Activist**" at one time rather than creating separate lists by using the Activist Code picker.

# Creating Activist Codes

- **Assigning or Removing Activist Codes**

- **"Can be assigned or removed"** allows the Activist Code to be assigned or removed from a contact record and is checked by default. There may be instances where removing the ability to add or remove the Activist Code from records after it's been applied, for example, restricting assignment or removal would be appropriate for ballot language requests or party delegates. Un-checking the option after the initial group is set will make the Activist Code available for searching and reporting but not modifiable unless you are an administrator for your committee.

Can Be Assigned or Removed



# Creating Activist Codes

- **Designating Official Types and District Roles**
  - **Official Types** and **District Roles** associates the Activist Code with specific types of advanced organizational designations for voters.
- **Assigning Multiple Designations**
  - Multiple assigned designations are useful in tracking engagement levels, such as when someone makes multiple requests for planned giving information. If you apply the Activist Code when they make a request (through forms, mailers, or direct requests), you will then have a record of their interest level.
  - Multiple assignment used in conjunction with District Roles options enables the assignment of multiple unique districts. For example, this could be used to specify each of the districts a volunteer or staffer is engaged.

Can Be Assigned Multiple Times

District Roles\*  2011-2021 Congressional  2011-2021 State House

2011-2021 State Senate  Advocacy CD  Advocacy HD

Advocacy SD  Congressional  County  None

State  State House  State Senate

Applies To Organizations

# Creating Activist Codes

- **Choosing Status**

- Status determines the visibility and usage of the Activist Code. By default, Activist Codes default to Active. An Archived Activist Code can still be used in searching; however, it will not appear on normal lists. An Inactive Activist Code will no longer appear on the site unless an administrator reactivates it.

- **Identifying Owner Committee**

- The Owner committee records which committees created the Activist Code. In most cases, this will never change and is set to default.

Status  Inactive  Active  Archived

Owner Committee\*

# Manually Adding Activist Codes to Contact Records

# Manually Adding Activist Codes to Contact Records

- Select the **voter record**, from the **Overview**, select the pencil icon to edit the Activist Code section, add codes from the dropdown menu, and Save
- Or, add Activist Codes from the **All Details** page by scrolling to the Activist Codes page section and choosing Activist Codes from the dropdown menu, and **Add New**
- It is possible to add multiple Activist Codes using either selection workflow **by repeating the process.**

Abigail Adams [+ Follow](#)

(617) 555-1234 (Cell)

maddie@sink.sendgrid.net (Personal)

563 Broadway Somerville, MA 02145-2527 US (Home)

VANID

108163247 [Go](#)

▼ Activist Codes

No activist codes

[Save New](#)

[Add Multiple Activist Codes](#)

Home / Abigail Adams [Customize view](#)

Abigail Adams

VANID 108163247

[Add](#) [Schedule](#) [More](#)

Activity Financial **Notes**

**Activist Codes** >

No Activist Codes

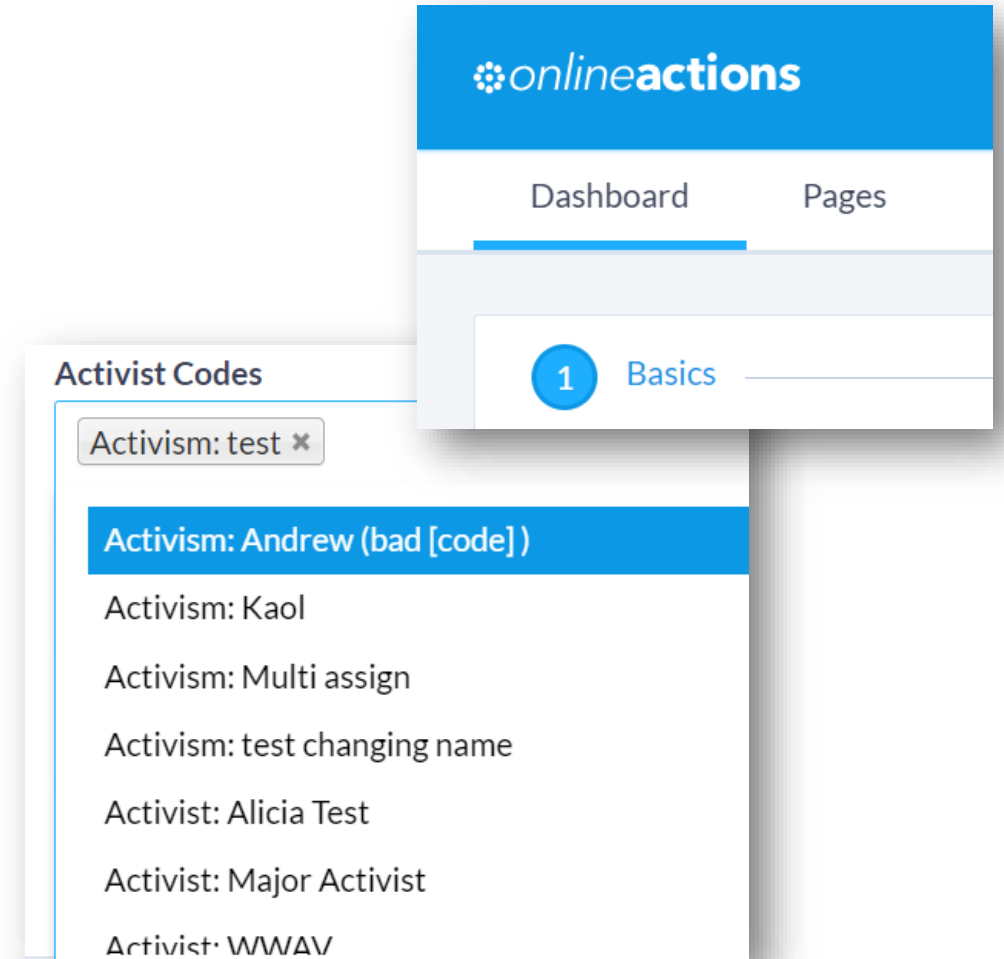
**Membership** >

This contact did not automatically qualify for any membership

# Using Online Actions to Apply Activist Codes

# Using Online Actions to Apply Activist Codes

- Activist Codes automatically apply to any contacts who fill in an **Online Actions form**.
- Add Activist Codes from the **Basics step in the Track Your Efforts** section, which applies the code to anyone who submits your form.
- You can also add individual Activist Codes from the **Build Page > Interests or Build Page > Additional Information**.



# More ways to apply Activist Codes

## More Ways to Apply Activist Codes (link out in resources)

- Apply Activist Codes to responses in **Virtual Phone Bank** or **MiniVAN**
  - [Read more on using Activist Codes with Scripts](#)
  - Whether you're launching a canvass or running a virtual phonebank, you will need a script. Your script is a roadmap for canvassers to follow during conversations on doors or on the phone. Activist Codes can be attached to scripts as labels you apply to contact records to track individuals according to their interests and their relationship to your organization.
- Manually apply Activist Codes during **Data Entry**
  - [Read more about Data Entry](#)
- Apply Activist Codes using **Bulk Apply** or **Bulk Upload**
  - [Read more on applying Activist Codes with Bulk Apply and Bulk Uploader](#)

# Viewing and Searching on Activist Codes



# Viewing Activist Codes on Contact Records

- **Viewing Activist Code on the Contact Records**
  - For performance reasons, the **Activist Code list** does not automatically display the counts for all the Activist Codes on the list. To see the number of records assigned Activist Codes, find the count drop down box on the Activist Code page and select **On**. Refresh to see how many voters have been assigned the Activist Codes. **Use the filters** at the top of the page to limit the number of Activist Codes the system must calculate to speed page loading.

Home / Activist Codes

ADMIN SETTINGS

## Activist Codes

Type Scope Activist

Count Committee

On VAN

Campaign Type Campaign

# Searching on Activist Codes

To build a list including the Activist Codes you have access to use the Activist Code section of **Create a List**.

OTHER SEARCH CRITERIA

▼ Activist Codes ★

Activist Code

Input Type  Contact Type

Contacted By

Entered by

Date Contacted

Date Entered

Origin

Count ⓘ  to

CONTACTS

## Create A New Search

**Step 1: (Start with anyone who meets the selected criteria)**

FAVORITES

Click the stars below to move search criteria to the top.

OTHER SEARCH CRITERIA

➤ Activist Codes

➤ Addresses

➤ Age • Registration Date

## Refine your search by:

- Adjusting metrics like the date the Activist Code was entered
- Using the person who entered the Activist Code
- Identifying the Origin Source, and more!

# Searching on Activist Codes

The dropdown in **Create a List** can only display up to 30 codes. To see the entire list, click on the **blue Field Name** rather than the dropdown menu. This will take you to a page that displays all of your Activist Codes.

CONTACTS

## Create A New Search

**Step 1: (Start with anyone who meets the selected criteria)**

FAVORITES

Click the stars below to move search criteria to the top.

OTHER SEARCH CRITERIA

▼ Activist Codes

Activist Code

[\[Check All\]](#) [\[Check All Activists\]](#) [\[Un-Check All\]](#)

### Activism [\[Check Type\]](#)

- Andrew (bad [code] ) (VAN)
- Kaol (VAN)
- Multi assign (VAN)
- test (VAN)
- test changing name (VAN)

### Activist [\[Check Type\]](#)

- Alicia Test (VAN)
- Major Activist (VAN)
- WWAV (VAN)

### Campaign [\[Check Type\]](#)

- Mobile Message Alert (VAN)

### Contactability [\[Check Type\]](#)

- ATS: Opted-In SMS (VAN)

### Donor [\[Check Type\]](#)

- Democracy Circle (VAN)

### Email Interests [\[Check Type\]](#)

- Chandni M1 (VAN)
- Chandni Multi 4 (VAN)
- Chandni Multi 5 (VAN)
- Chandni Non Multi 2 (VAN)
- Chandni Non Multi 3 (VAN)
- Chandni Test (VAN)
- Chandni Test 6 (VAN)

# Reporting On and Deleting Activist Codes

# Reporting On Activist Codes

Using **Report Manager** in the **Sidebar**, a user can **report on Activist Codes** by searching for Activist Codes in the search bar.

Once **Activist Codes Report** is selected, a user can select the **Activist Code Details drop box** to edit search filters.

After search filters are set, select **Run Report** to find the results of the **Activist Code search**.

EveryAction allows a user to **create custom reports** that reflect searchable data [using PDF Report Builder](#).

REPORTS

## Report Manager

To run a **Contacts Report**, use [Create a New List](#) and [My List](#) to view and filter contact records.

Recent

- Default Templates
- Saved Templates
- Scheduled Templates
- Data Integrity PDF
- Canned Reports
- Fundraising Analysis
- Counts and Crosstabs
- Canvass Results
- PDF Report Builder
- Call Sheets
- Export Formats

Recent

View recently run reports from all types

Filter by name

Report Name

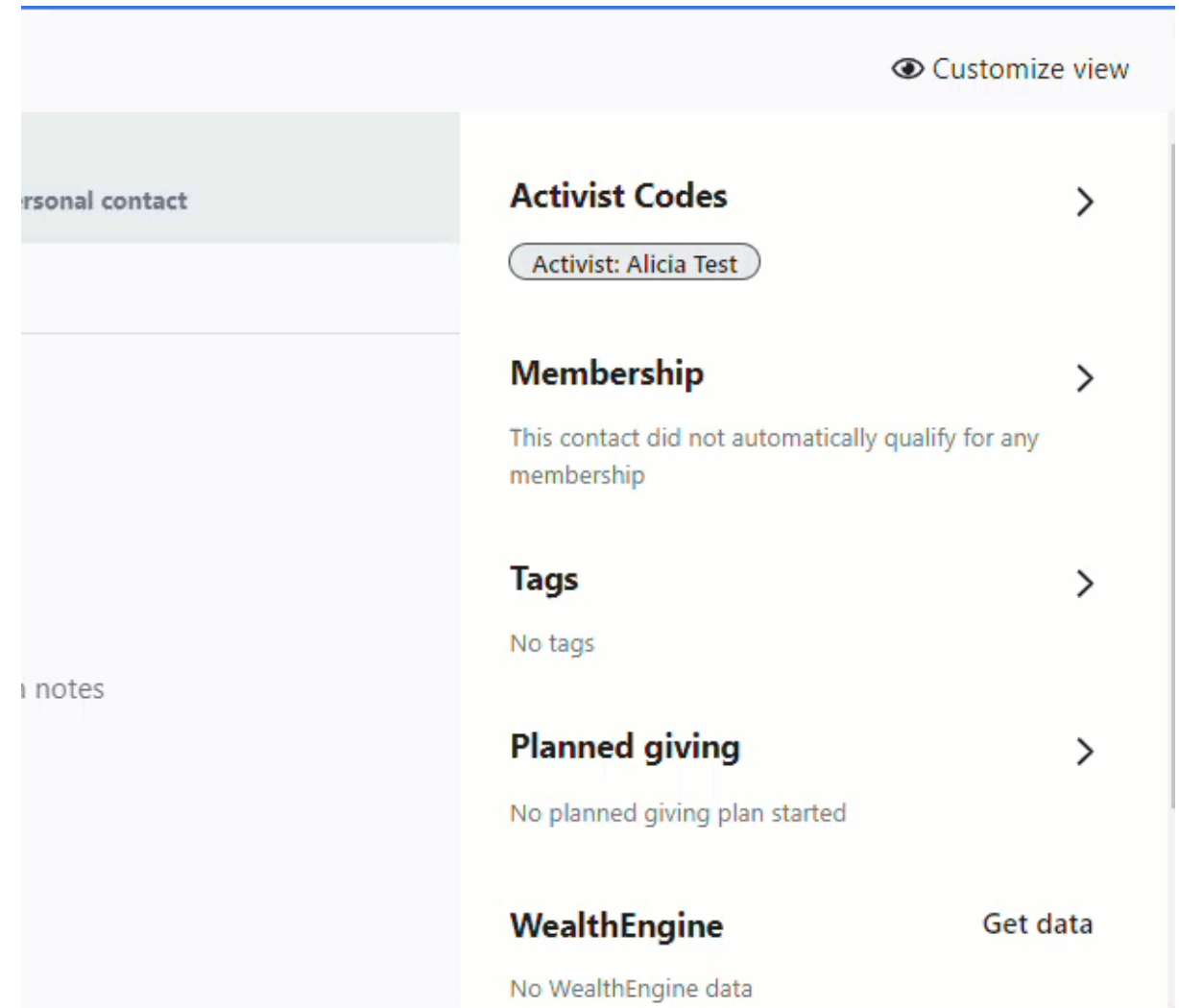
- [Acquisition ROI Report](#)  
Last viewed today at 4:34 PM • Type Fundraising, Contr
- [Activist Codes Report](#)**  
Last viewed September 14, 2023 • Type Activist Codes
- [Follow Ups Report](#)  
Last viewed over a month ago • Type Follow Ups
- [Independent Expenditure Tracker](#)  
Last viewed over a month ago • Type Independent Expe
- [Contribution Report](#)  
Last viewed over a month ago • Type Contributions

# Deleting Activist Codes

Activist Codes can be removed from a record.

If you do not see the option to remove an Activist Code, please follow up with your administrator and provide them with the information they will need to remove this Activist Code for you.

Your administrator will likely request the name of the record, the VAN ID, and Activist Code you would like removed. Users with the correct permissions can also **delete Activist Codes** in bulk using the **Bulk Upload tool**.



The screenshot shows a user interface for a contact record. At the top right, there is a "Customize view" link with an eye icon. The main content area is divided into two columns. The left column has a header "Personal contact" and a section "Notes" with a plus icon. The right column contains several sections, each with a right-pointing chevron: "Activist Codes" (with a sub-item "Activist: Alicia Test" in a rounded rectangle), "Membership" (with a note: "This contact did not automatically qualify for any membership"), "Tags" (with "No tags"), "Planned giving" (with "No planned giving plan started"), and "WealthEngine" (with "No WealthEngine data" and a "Get data" link).

# Q & A



# Additional Resources



# Support

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



# Help Center Resources

- [Fundamentals: Understanding Codes](#)
- [How to: Use Activist Codes](#)
- [Video: Activist Codes](#)
- [Overview: Activist Codes in EveryAction](#)



# 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!

