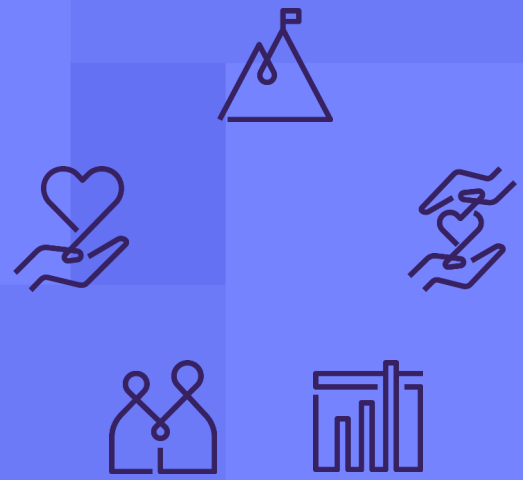
DONOR ENGAGEMENT

Evaluating Your Impact Using Source Codes



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Introduction & Learning Objective

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Meet your Trainer...

Jaime

Training Specialist

Donor Engagement

EveryAction

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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

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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?

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Creating Source Codes

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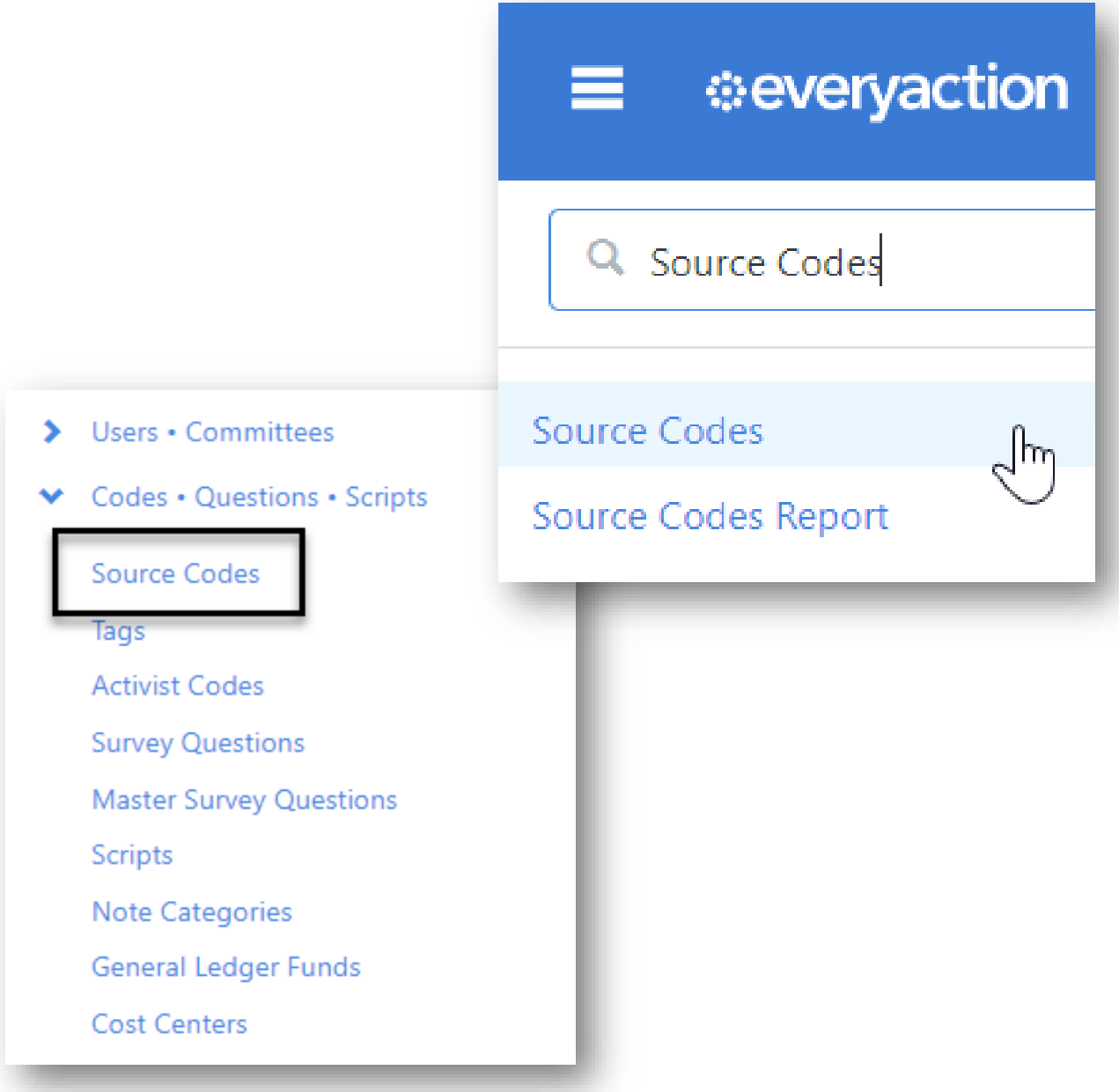
Creating Source Codes

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**

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Source Codes Application Overview

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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

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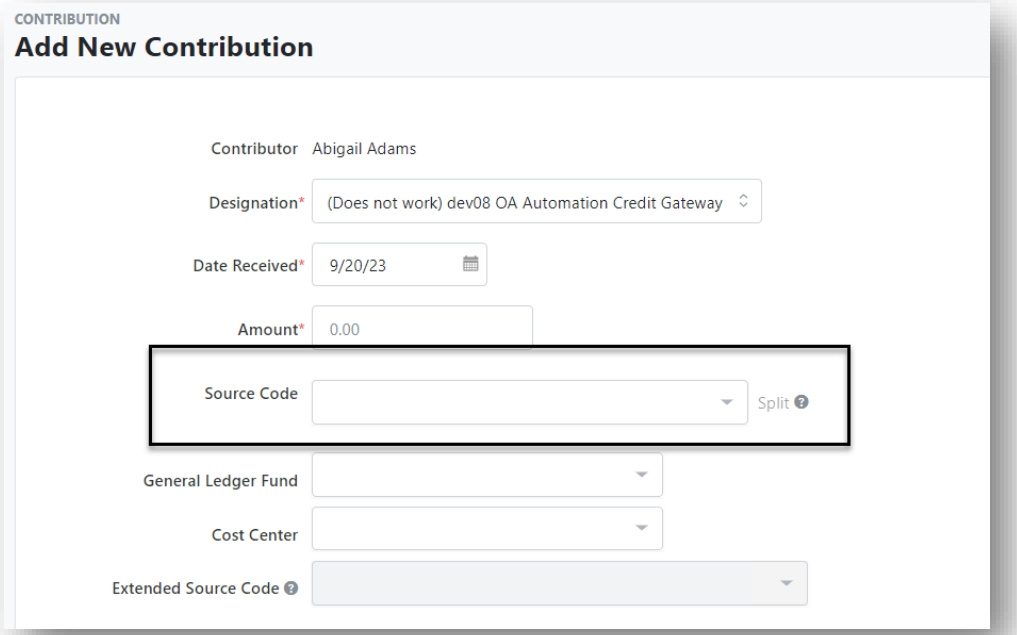
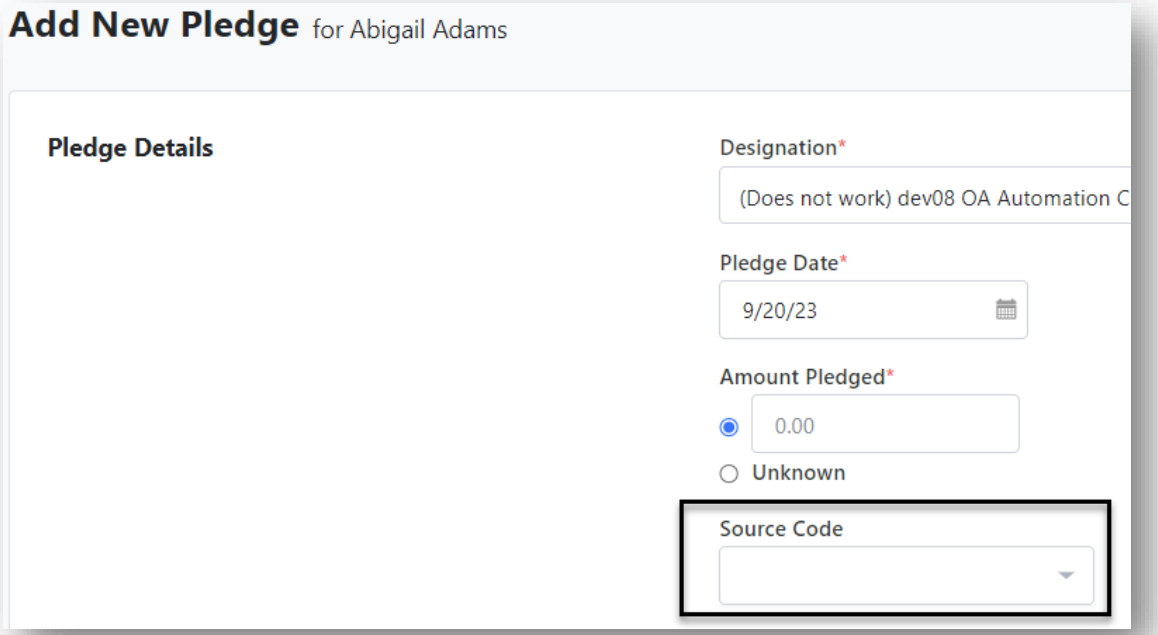
Applying Source Codes to Contributions

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.

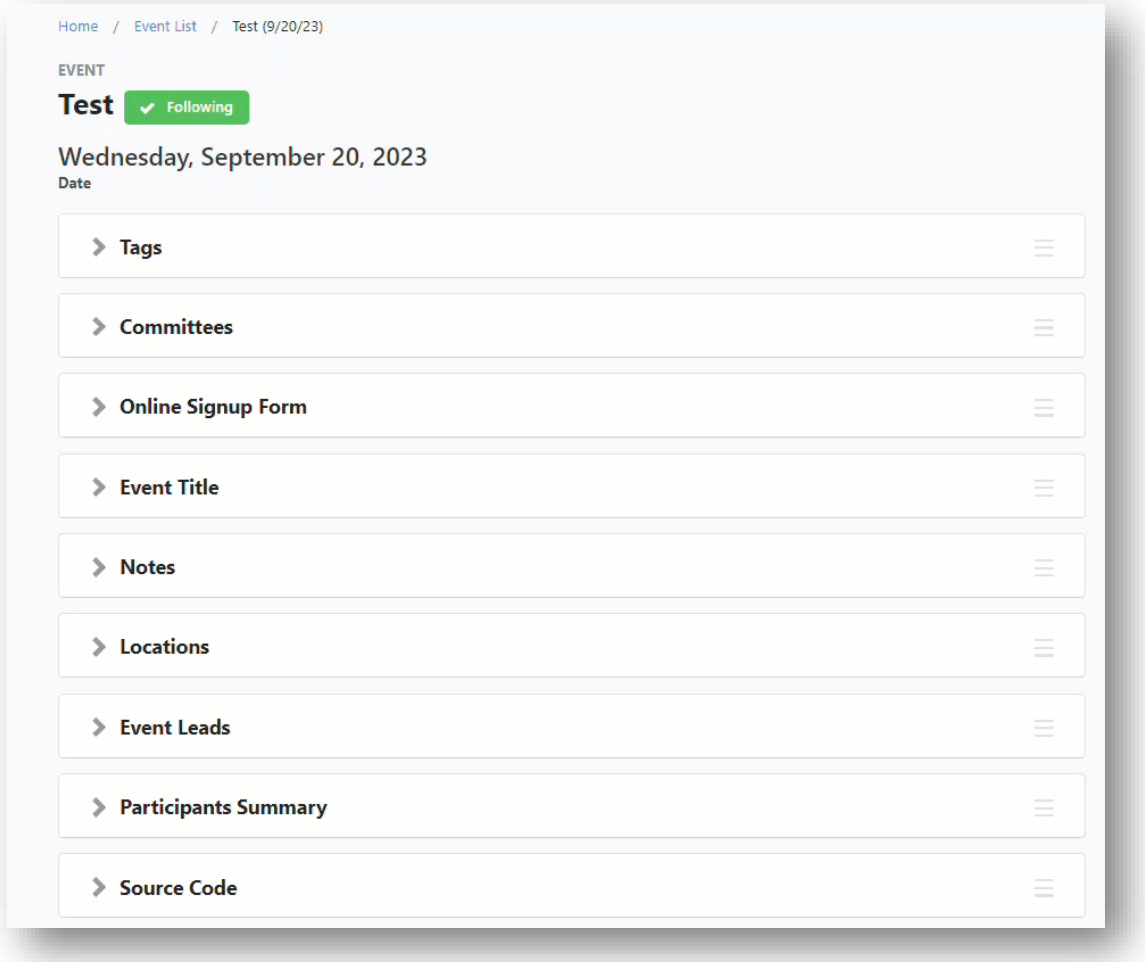




Applying Source Codes to Events

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

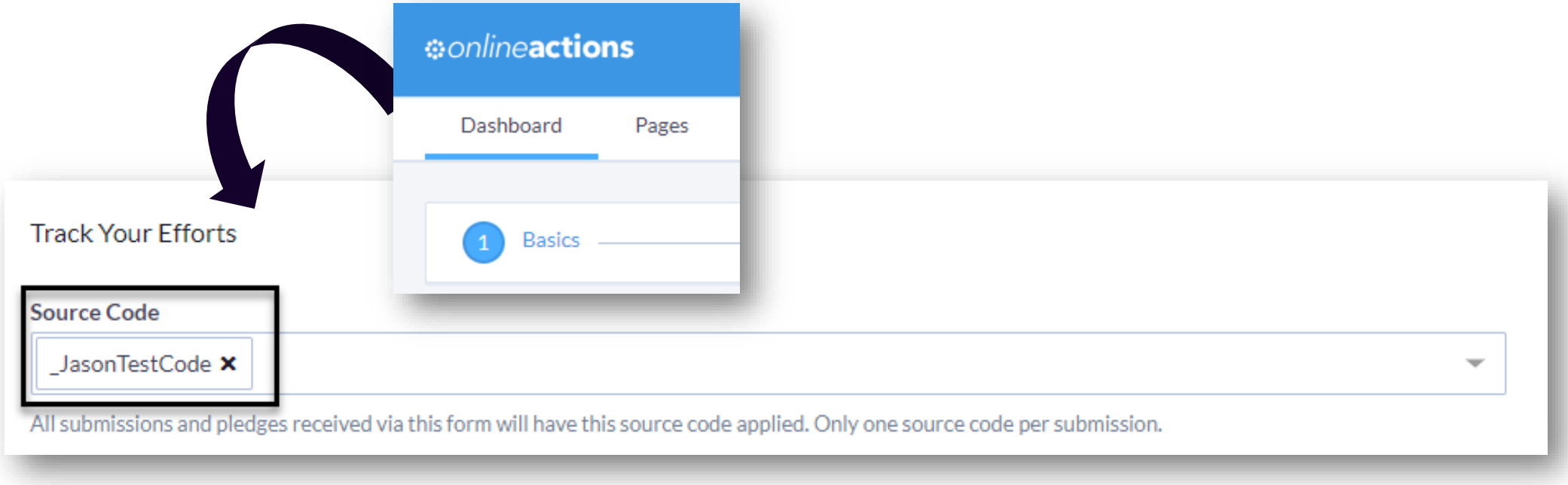
Once your **Event** has been created, you can scroll down from the Event details page to **add and remove** Source Codes.



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.

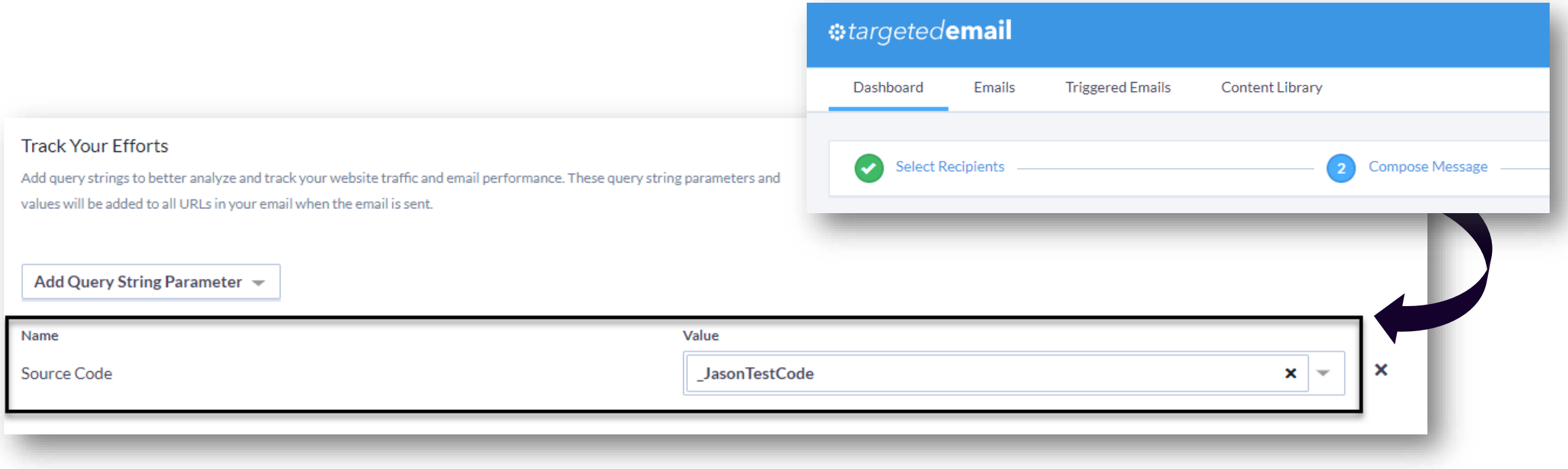


Applying Source Codes in Targeted Email

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.



Viewing and Searching on Source Codes

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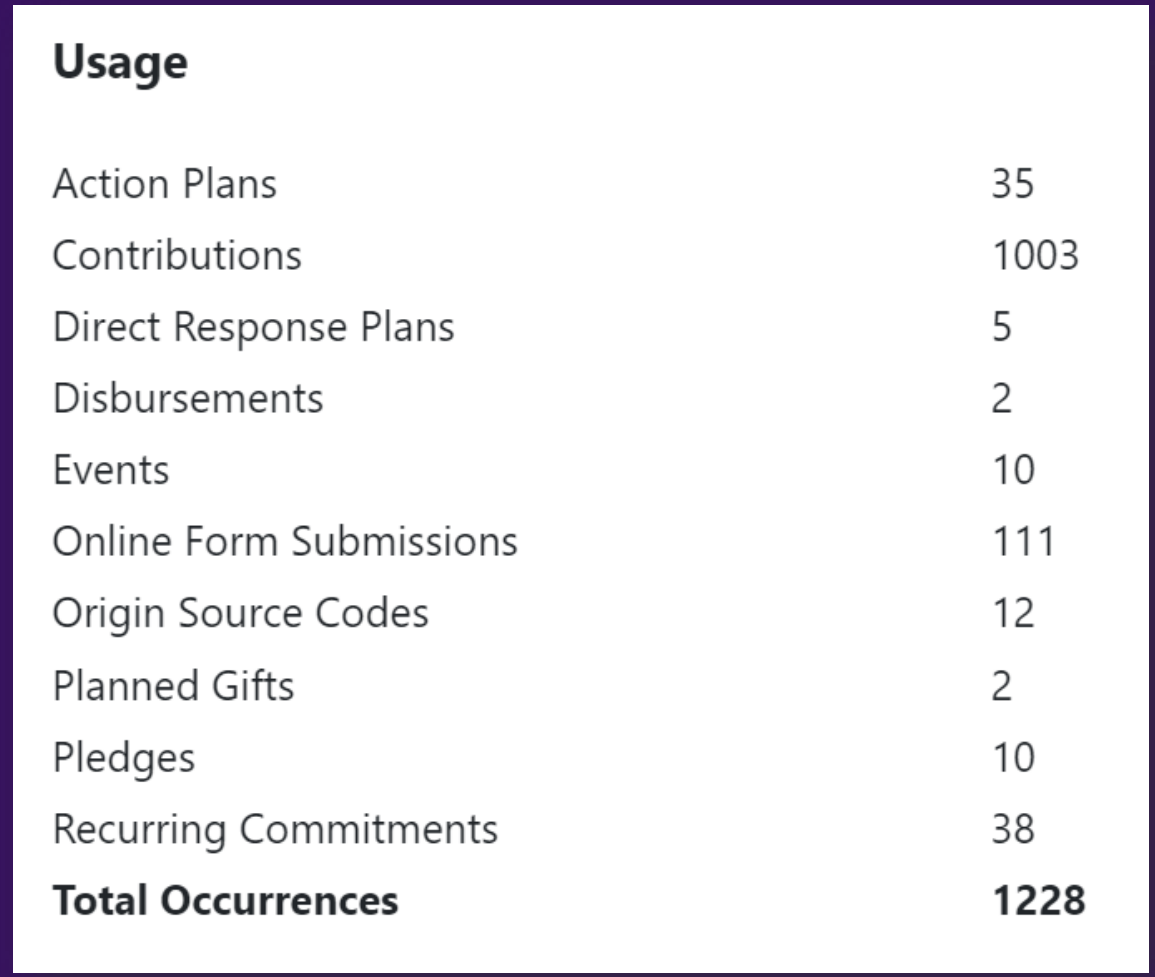
Viewing Source Codes Usage

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.

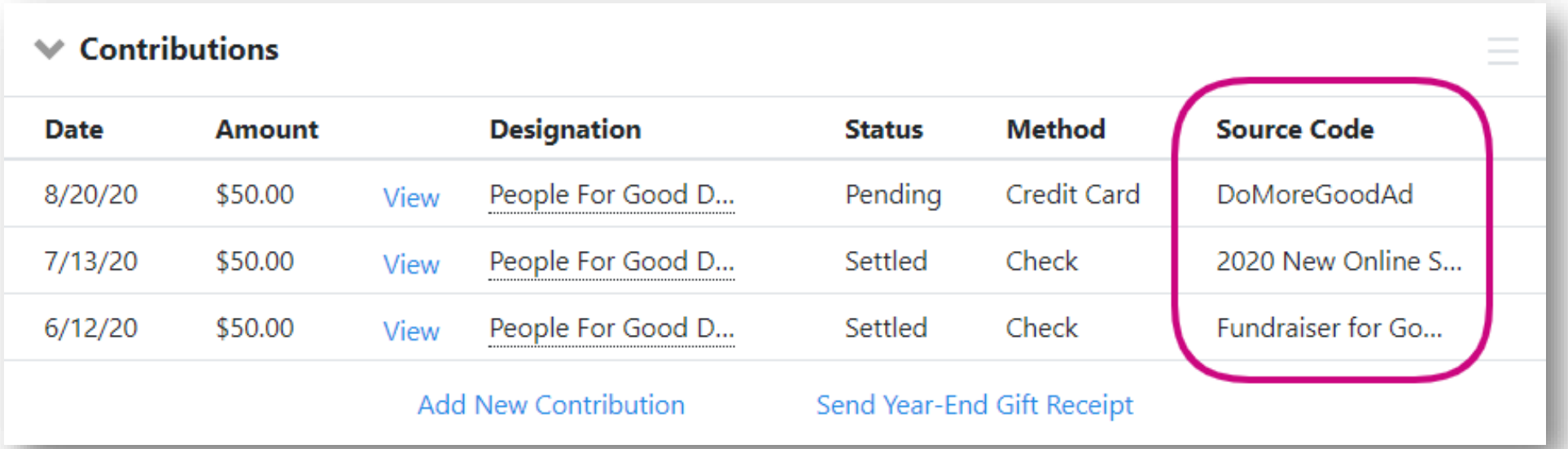
Select the source code you want to view by selecting the **Name** from the list. At the bottom of the details page, you will see a section for **Usage** that will indicate how many times it has been referenced in your plans, forms, and records.



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**

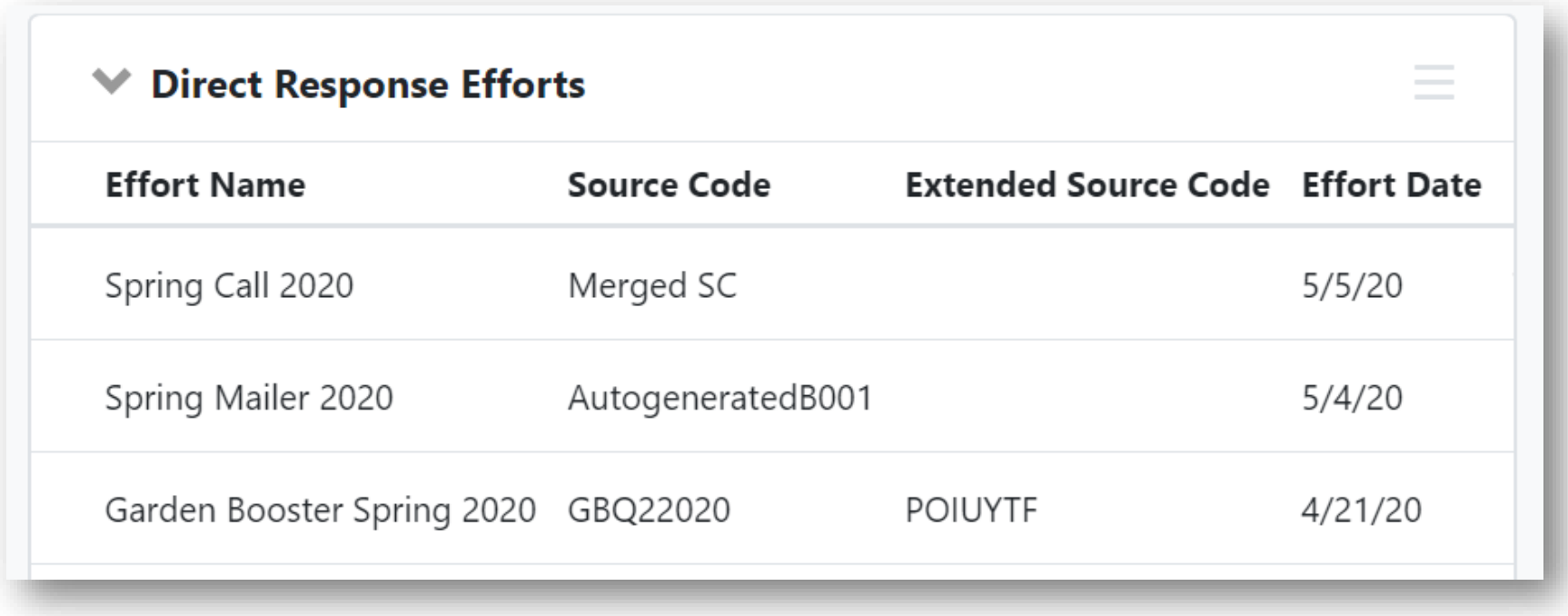
Viewing Source Codes on the Contact Record

- 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.



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.

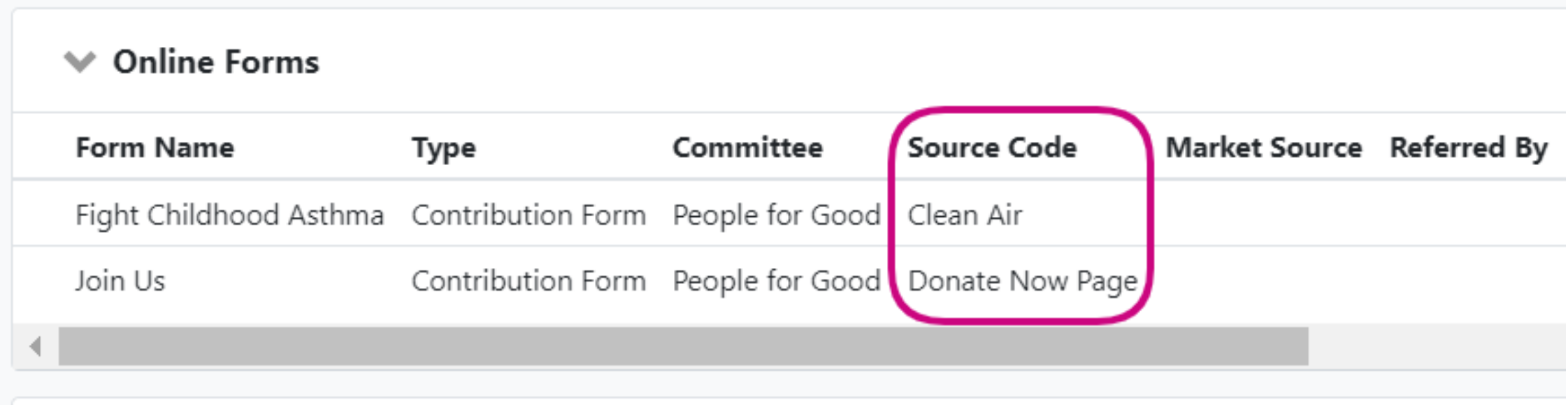


Direct Response Efforts

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.

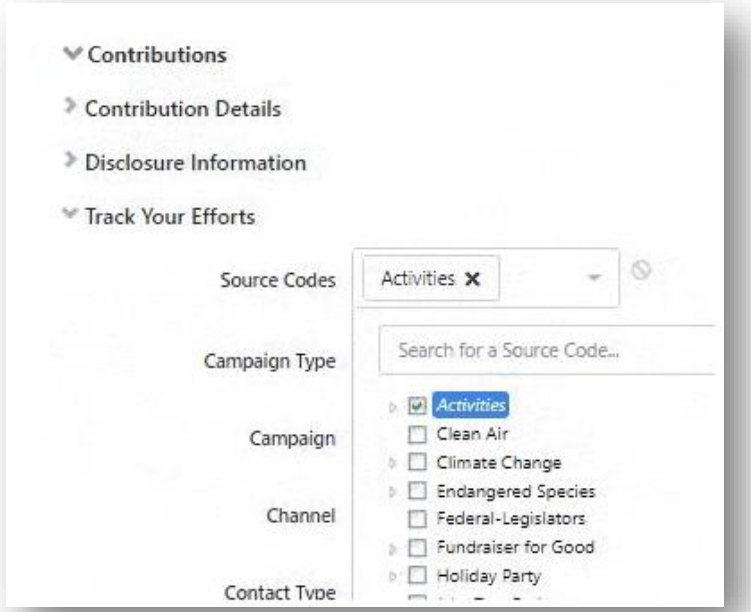


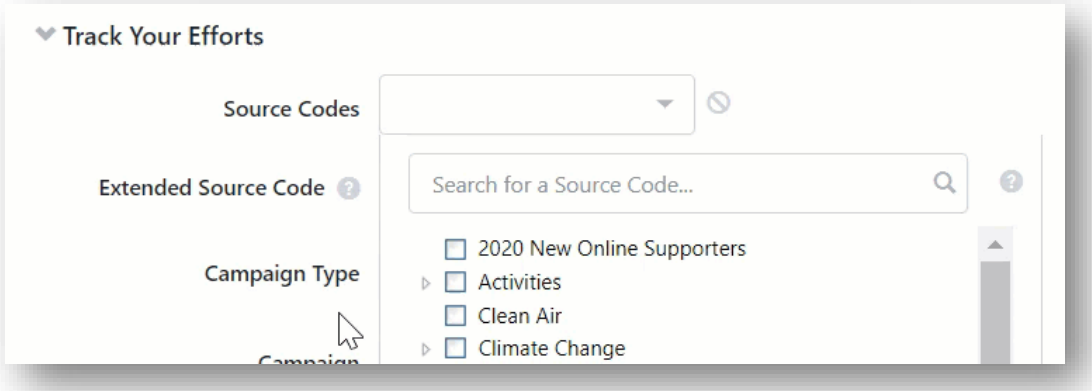
Searching on Contribution Source Codes

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**.

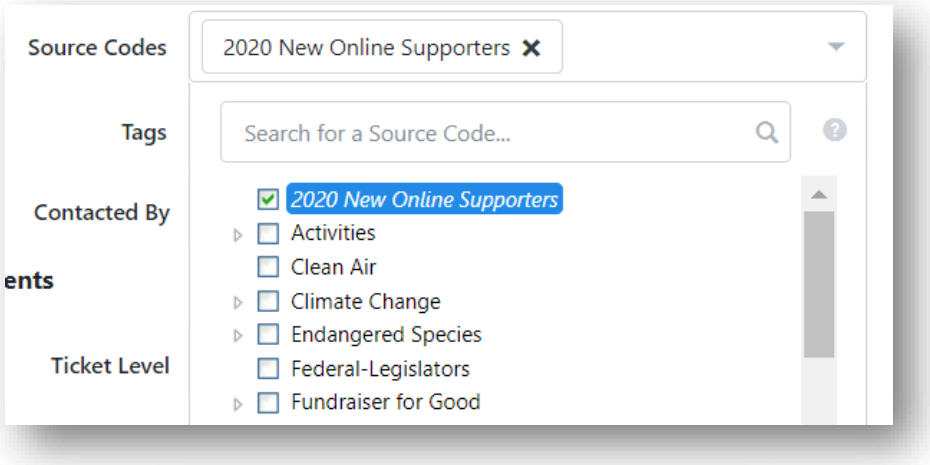
Source codes automatically created from query string links to your forms will appear under the parent code **Forms Autogenerated.**



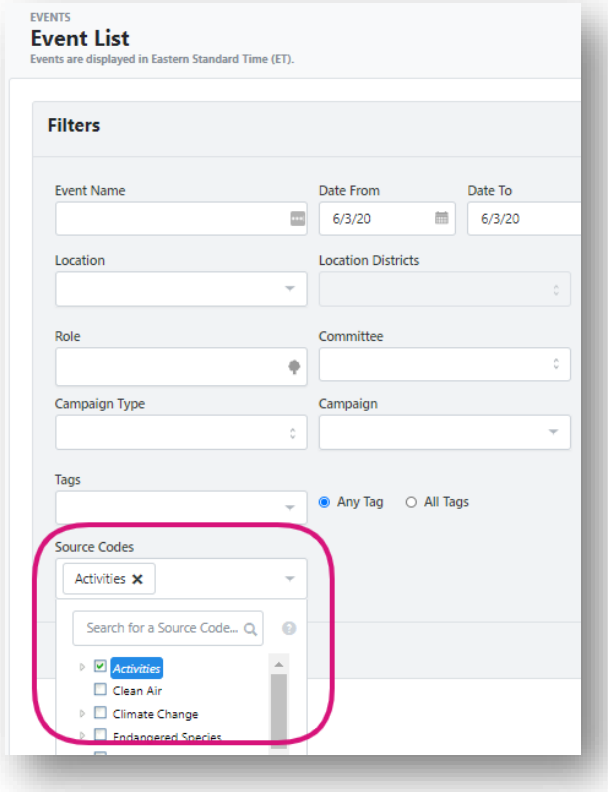


Searching on Event Source Codes

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.



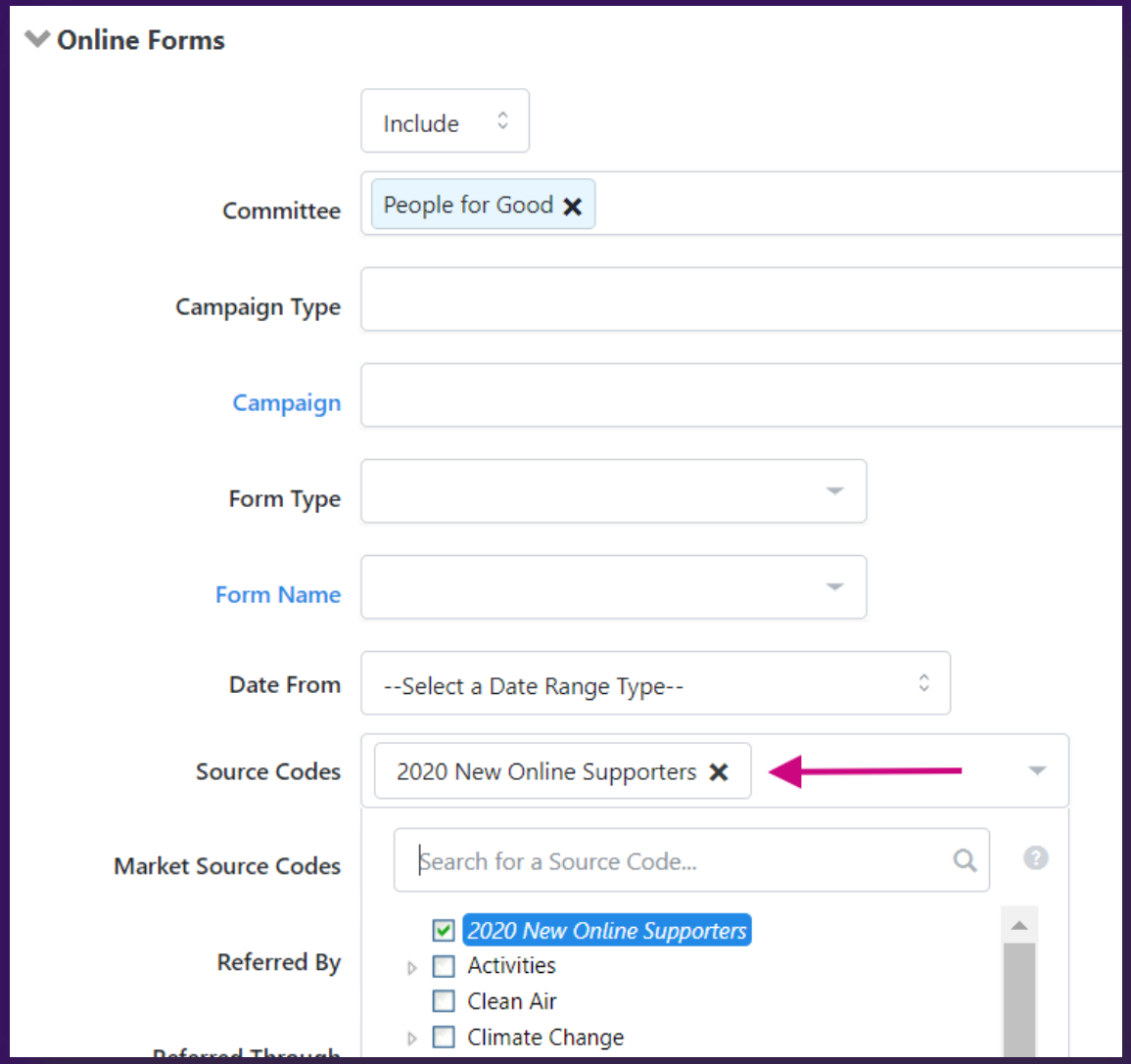
If you want a list of all the events associated with a particular source code, you can filter the **Event List** page using one or more source codes.



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.



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Tracking and Reporting on Source Codes

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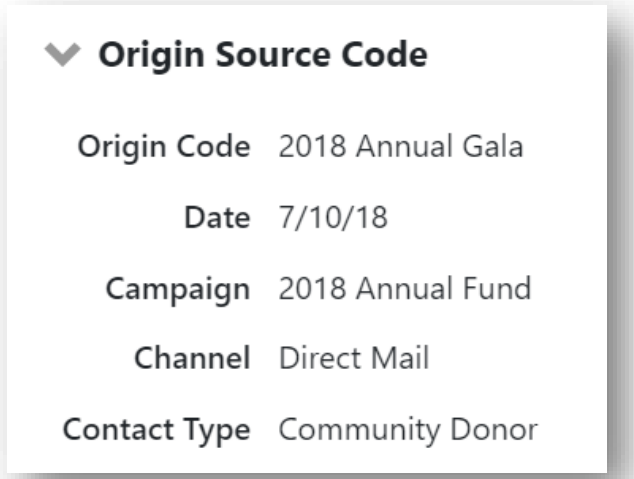
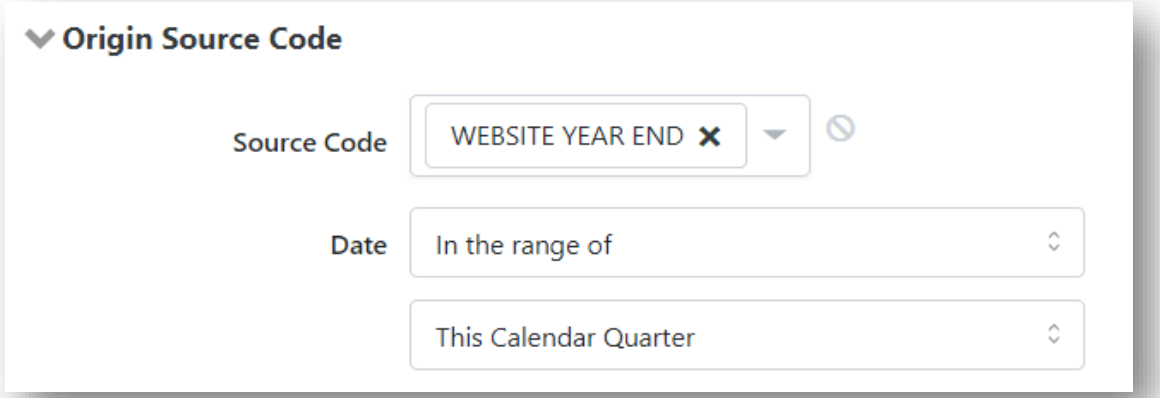
Tracking on Source Codes

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.

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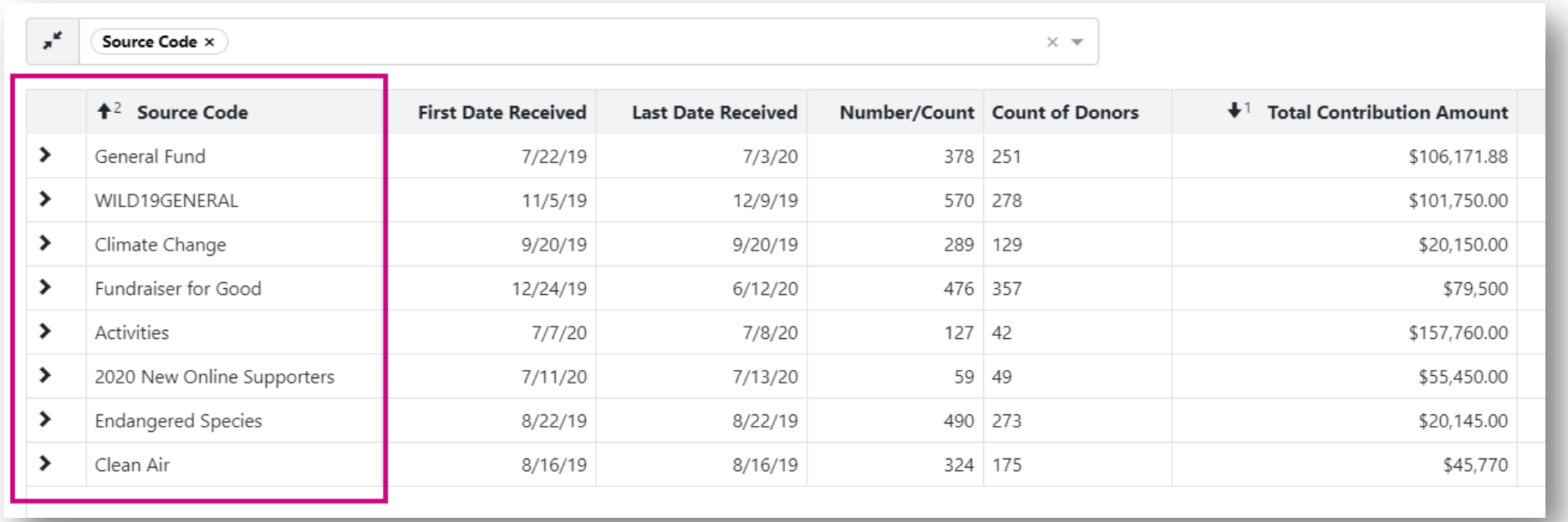
Build Reports with Source Codes

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.



Source Code	First Date Received	Last Date Received	Number/Count	Count of Donors	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

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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: 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!

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