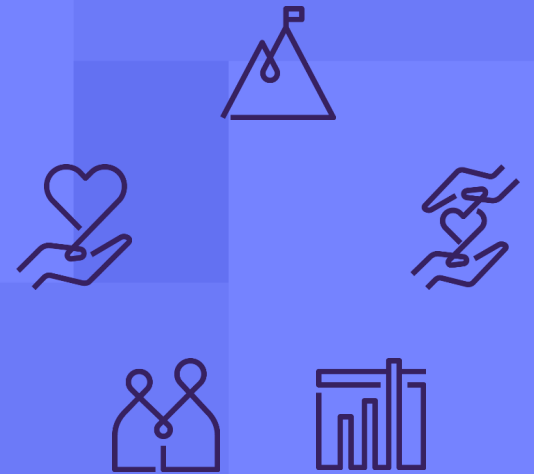


**DONOR ENGAGEMENT**

# Getting Started with EveryAction



# Meet your Trainer...

Ryan Sauve

Training Specialist

Donor Engagement

EveryAction



# Agenda

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



# User Access for the Database with ActionID

# Understanding the ActionID

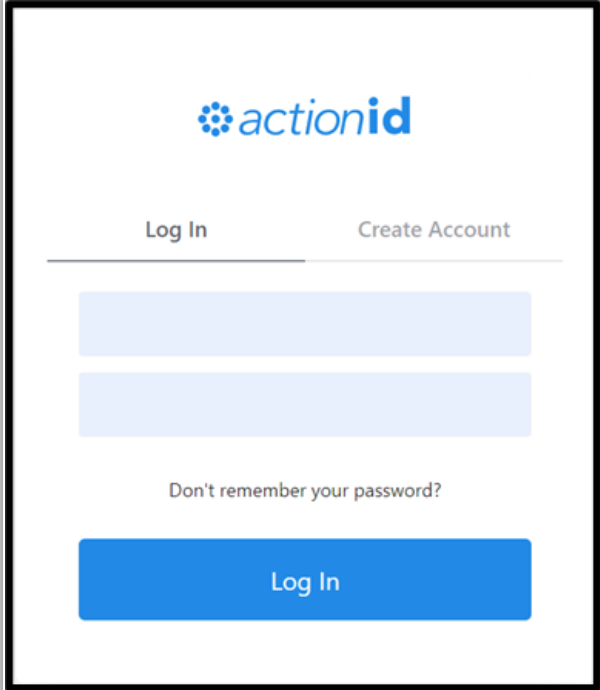
ActionID is your login credential that consists of your email address and a password. This is what you use to log into your database

## 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.

A screenshot of the ActionID login interface. At the top center is the ActionID logo, which consists of a blue gear icon followed by the text "actionid" in a blue sans-serif font. Below the logo are two links: "Log In" and "Create Account", both in a smaller blue font. A horizontal line separates these links from the input fields. There are two light blue rectangular input fields, one for the email address and one for the password. Below the password field is a link that says "Don't remember your password?". At the bottom of the form is a large blue rectangular button with the text "Log In" in white.

# 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.

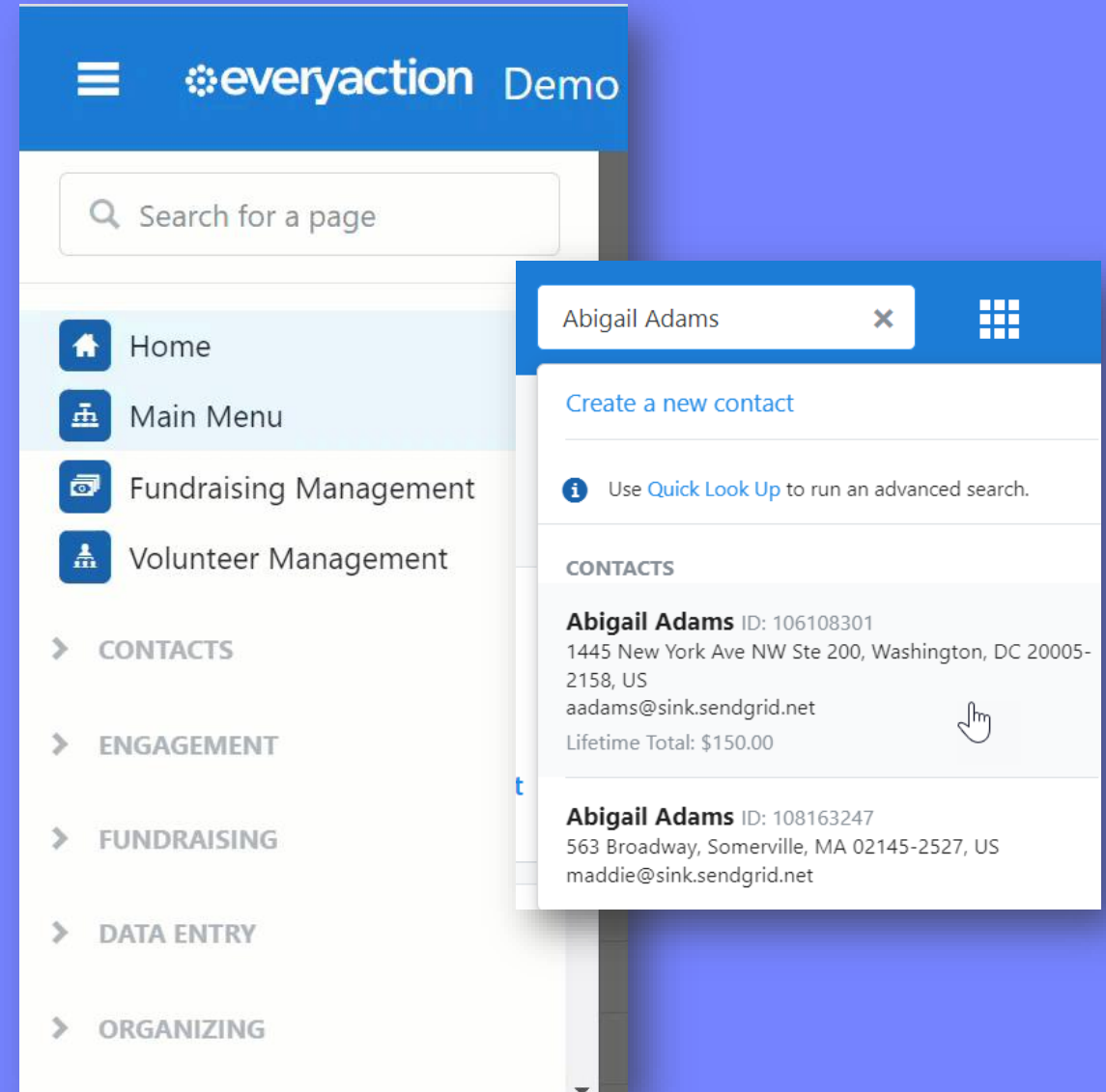
People with an ActionID that do not have access to the database itself (i.e. they don't have a User Account) are called Public Users.

# Database Walkthrough

# 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



The screenshot displays the EveryAction Demo interface. At the top, there is a blue header with the EveryAction logo and the word "Demo". Below the header is a search bar with the placeholder text "Search for a page". To the left, a sidebar menu is visible, featuring a hamburger icon at the top. The menu items include: Home, Main Menu, Fundraising Management, and Volunteer Management. Below these are several categories with expandable arrows: CONTACTS, ENGAGEMENT, FUNDRAISING, DATA ENTRY, and ORGANIZING. On the right side, a contact search overlay is shown. It has a search bar containing "Abigail Adams" and a close button. Below the search bar, there is a "Create a new contact" link and a tip: "Use Quick Look Up to run an advanced search." The overlay lists two contact records for Abigail Adams. The first record has ID: 106108301, address: 1445 New York Ave NW Ste 200, Washington, DC 20005-2158, US, email: aadams@sink.sendgrid.net, and Lifetime Total: \$150.00. The second record has ID: 108163247, address: 563 Broadway, Somerville, MA 02145-2527, US, and email: maddie@sink.sendgrid.net. A hand cursor is pointing at the first record.



# 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.

## Administrative Menu

Settings and Preferences

State Updates

Mail Merge Templates

➤ Reports • Forms • Labels

➤ MiniVAN

➤ Exports

➤ Letters

➤ Phone Services

➤ Users • Committees

➤ Codes • Questions • Scripts

➤ Campaigns

➤ Contributions

➤ Membership

➤ Volunteers • Events • Locations • Titles

➤ Monitor the System

➤ System Performance

# 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

## Quick Look Up



Quick Look Up



Quick Add New Contact

## Lists



Create A New List



Go to My List (11 Contacts)



View My Folders

# 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








The screenshot displays the 'Report Manager' interface. At the top right, a 'Reporting & Data Analysis' menu is visible, containing 'National Dashboard', 'Analytics Dashboards', and 'Report Manager'. The main interface has a header 'REPORTS Report Manager'. Below the header is a blue informational banner: 'To run a Contacts Report, use [Create a New List](#) and [My List](#) to view and filter contact records.' The left sidebar lists report categories: 'Recent', 'Default Templates', 'Saved Templates', 'Scheduled Templates', 'Data Integrity PDF', 'Canned Reports', 'Fundraising Analysis', 'Counts and Crosstabs', 'Canvass Results', 'PDF Report Builder', 'Call Sheets', and 'Export Formats'. The main content area shows a 'Recent' section with a 'Filter by name' input field. Below this, a 'Report Name' section lists three reports: 'Activist Codes Report' (last viewed August 31, 2023), 'Follow Ups Report' (last viewed August 15, 2023), and 'Independent Expenditure Tracker' (last viewed August 14, 2023). A fourth report, 'Contribution Report', is partially visible at the bottom.

# 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**

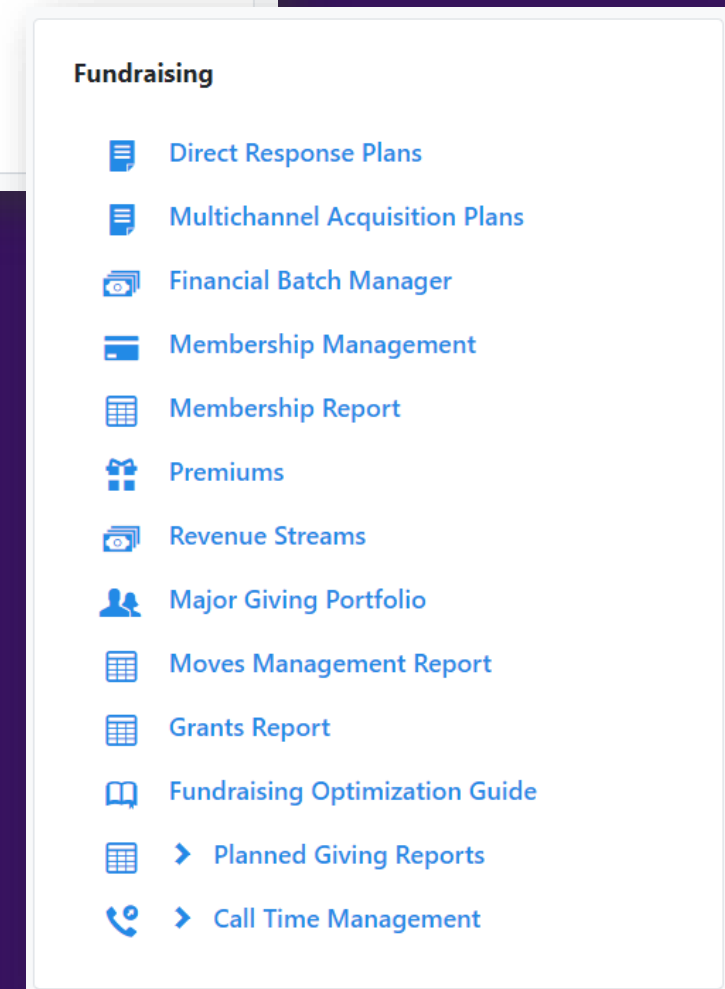
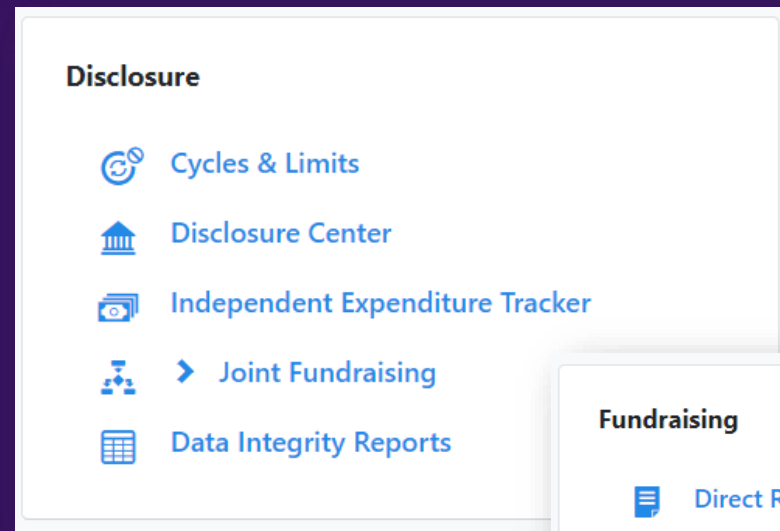
## Load Data

-  Quick Mark
-  Scan Bar Codes
-  Script View
-  Grid View
-  > Form View
-  > Run Bulk Uploads
-  Upload Finder File

# 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









# 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

## Engagement

-  Ad Audiences
-  Automation
-  Mobile Messaging
-  Online Actions
-  Online Actions prod-Forms-prod-stagingslot
-  Targeted Email

## Events

-  Create New Event
-  Calendar
-  Event List
-  Event Participant List
-  Published Event List Pages
-  Supporter Groups
-  Event Requests **0**
-  Event Attendee Check-In

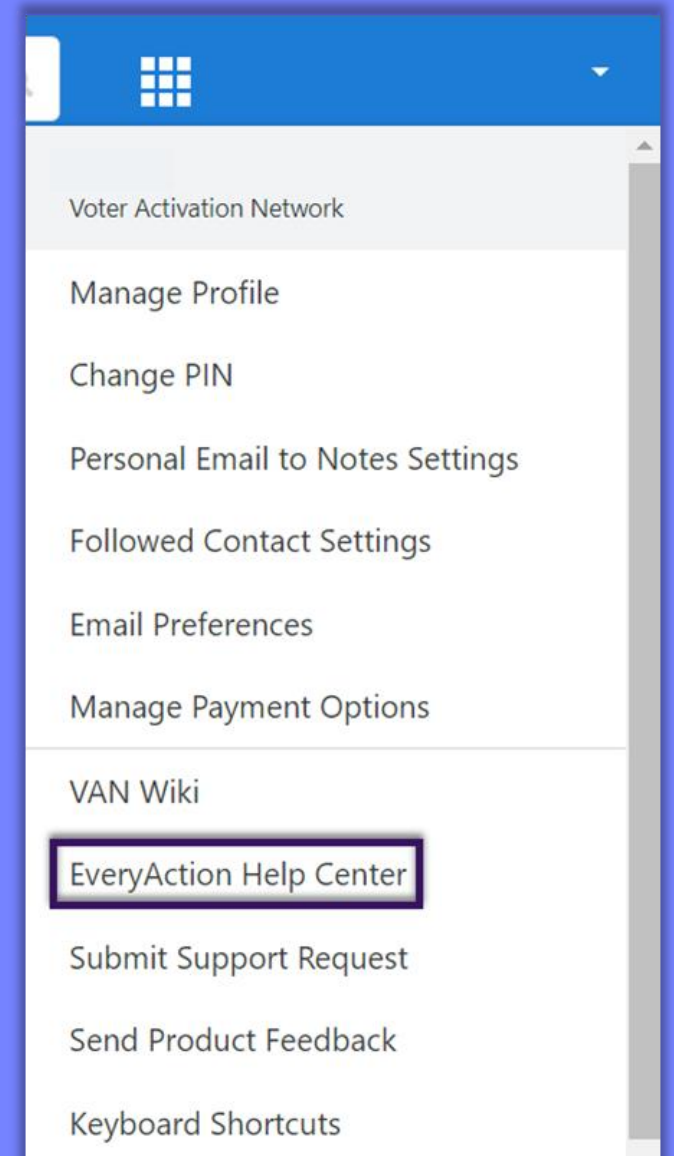
## Stories

-  Manage Stories

# Accessing Resources and Support

# 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.





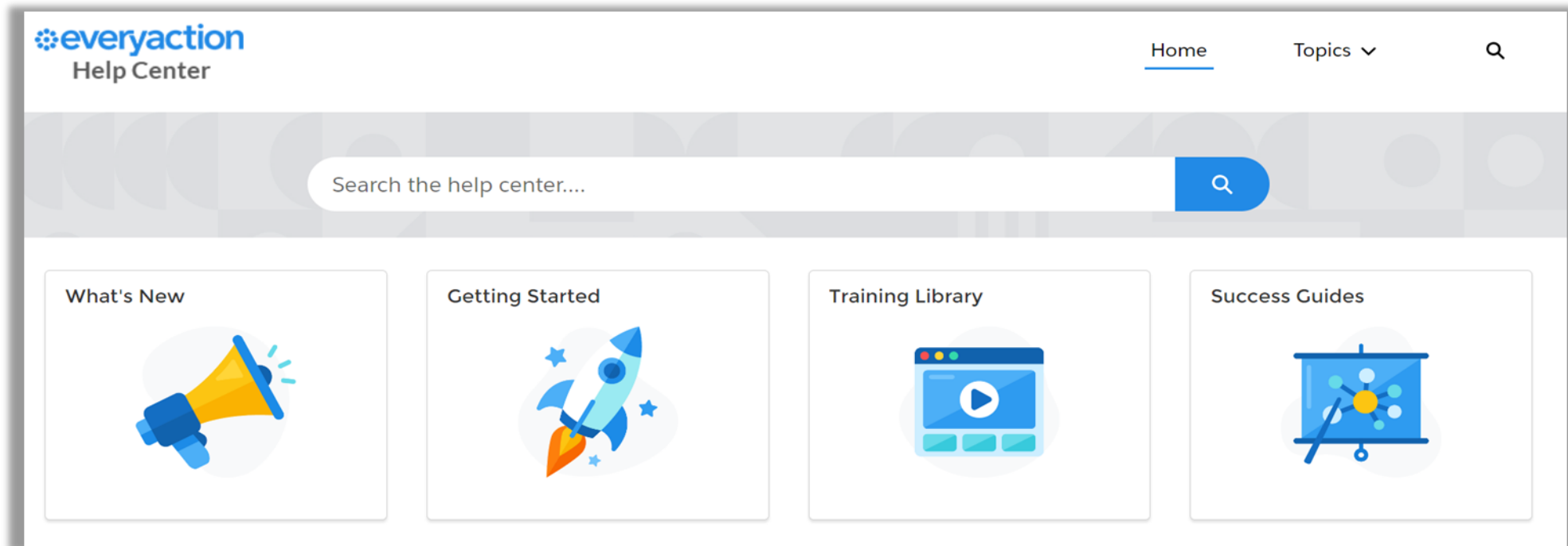
# EveryAction Help Center

**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



# 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](mailto: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

# 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

- [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



Thank You for Attending!

