
Administrator Training Using Source Codes

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Source Codes Presentation

What is a Source Code?

- A mechanism for determining the origin of users who do something specific on your Web site
- Examples
 - ▶ Click a link
 - ▶ Make a donation
 - ▶ Respond to an action alert

Why Use Source Codes?

- Understand Where Your Constituents Come From
- Understand What Drives Actions on Your Site
- Identify Affinity Groups or Partners Online
- Determine Cost Effectiveness of Banner Ads Hosted on External Sites
- Evaluate What Sections of Your Site are Most Effective at Driving Users to Take Action

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Different organizations will focus on different uses of Source Codes depending upon what their strategic objectives are.

For some organizations, the main focus is determining which partner organizations are driving the greatest number of constituents to their organization. This represents one method of identifying natural partnerships and affinity groups. Other organizations may be more focused on identifying which areas of their site (ex: “About Us” section, “Get Involved” section) are the most successful at leading constituents to take action on their site. Any organization that is using banner advertisements on external sites can benefit from using source codes as it provides an easy method of tracking how many users are coming from one banner ad or another.

Source Codes: Today's Presentation

- **Passive Source Codes:** Interactions that are automatically tracked by design in the Convio product
- **Active Source Codes:** Convio administrator-created additional codes to track user activities more specifically; examples:
 - ▶ Embedding a chosen source code into Convio PageBuilder pages
 - ▶ Embedding a chosen source code into any link on the Internet

Passive Source Codes

- Interactions that are automatically tracked
 - ▶ Donations
 - ▶ Action Alerts
 - ▶ Survey Responses
 - ▶ TeamRaiser™ Registrations
 - ▶ eCommerce purchases
 - ▶ Event RSVPs
 - ▶ Ticket Sales
 - ▶ Site Registrations

Passive Source Codes

- Possible originating **Convio** locations/sources:
 - ▶ Email
 - ▶ Tell-a-Friend
 - ▶ Web link
 - ▶ Other (No Value)
 - ▶ A specified source code that was embedded in a link
- Possible originating **outside** locations/sources:
 - ▶ A specified source code embedded in a link

Passive Source Codes

What Convio reports track passive source codes?

Interaction	Available Reports
Donation	Fundraising Analysis Report Donations by Source Report
Action Alert	Advocacy Analysis Report Alert Respondent Report
TeamRaiser™ Registration	Participant Registration Report
eCommerce	Orders by Source Code Report

Active Source Codes

- Administrators Can Create Source Codes
 - ▶ Involves appending extra information onto links that point to you site
- Used to Track Traffic That is Coming from External Sites
 - ▶ Partner organizations
 - ▶ Paid banner ads
 - ▶ Printed materials
- Used to Track the Effectiveness of Different Aspects of Your Site
 - ▶ Different pathways to the same form (e.g., left nav, banner, link in home page content)
 - ▶ Different sections of an email

URL Shortcuts

- Shortcuts are Invaluable to Effectively Utilizing Source Codes
 - ▶ Allows for easy distribution to external sites and use in printed materials
 - ▶ Administrator can change the target of any shortcut at a later date
 - ▶ For more information, view [Library Basics](#) on-demand class on Convio Customer Center

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The best way to develop links with source and sub-source codes for use outside your site (partner websites, banner ads, printed materials) is by using URL shortcuts. URL Shortcuts are under the “Library” category in your Convio admin area.

The screenshot shows the Convio admin interface. At the top, there is a navigation bar with links: Home, Content, Fundraising, Advocacy, Email, Constituent360, Library, Data Management, Site Setup, and Help. The 'Library' menu is open, showing options: Image Library, Document Library, Imported Content, Contributed Content, Navigation Bar, and URL Shortcuts (which is highlighted by a mouse cursor). Below the navigation bar, the page title is 'URL Shortcut Admin'. There is a sub-header 'URL Shortcuts List' and a main section 'URL Shortcuts'. A descriptive text reads: 'Use this application to manage URL shortcuts of the form training103.convio.com/short which can be used in banner ads, radio, TV or other media where the user must transcribe them by hand.' Below this is a 'Create New Entry' section with the following fields: '* Shortcut:' with a text input containing 'training103.convio.com/' and a dropdown menu; '* Link to go to:' with a text input and a dropdown menu labeled 'Select Target'; and a checkbox labeled 'External to the Convio system'.

Logged in as: SiteAdmin Administrator | [Logout](#) |

[Home](#) | [Content](#) | [Fundraising](#) | [Advocacy](#) | [Email](#) | [Constituent360](#) | [Library](#) | [Data Management](#)

URL Shortcut Admin

URL Shortcuts List

URL Shortcuts

Use this application to manage URL shortcuts of the form `training101.convio.com/short` which can be used in print collateral, radio, TV or other media where the user must transcribe them by hand.

Create New Entry

* Shortcut:

* Link to go to:

External to the Convio system

Administrator's Notes:

Records 1 - 1 of 1 [First](#) | [Previous](#) | [Next](#) | [Last](#)

Shortcut	Actions	Target URL	External	Notes
Home		PageServer?pagename=homepage	No	For example only - just delete this

Records 1 - 1 of 1 [First](#) | [Previous](#) | [Next](#) | [Last](#)

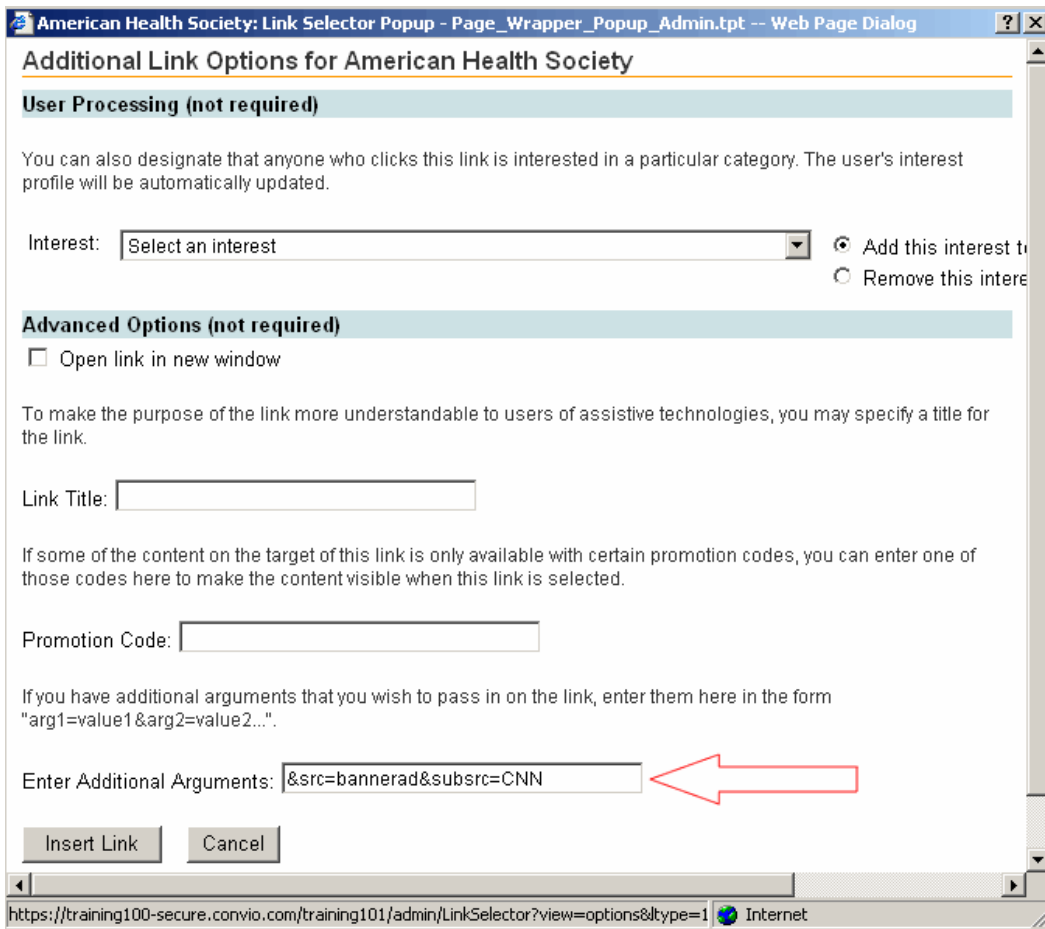
As demonstrated above, the URL that is being created will go to <http://www.yoursite.org/cnn>. By selecting the drop-down menu, you will have a number of categories to pick from. For this example, we'll select a Donation Classic Form, which launches the following pop-up box:

American Health Society: Link Selector Popup - Page_Wrapper_Popup_Admin.tpt -- Web Page Dialog

Link Types	Link Targets		
<ul style="list-style-type: none"> ⊖ Action Alert ⊖ Calendar ⊖ Club ⊖ Congressional Bill ⊖ Directory ⊖ Document Library ⊖ Donation Classic Form ⊖ Donation Form ⊖ Donation Level ⊖ eCard Campaign ⊖ eCommerce Product ⊖ eCommerce Store ⊖ Email Message ⊖ Gift Service Center ⊖ Page Navigator ⊖ PageBuilder ⊖ Photo Album ⊖ Premium Selector ⊖ Rewards ⊖ Roll Call Vote ⊖ Scorecard ⊖ StoryBuilder Article ⊖ Survey 	Records 1 - 10 of 27 First Previous Next Last <input type="text"/> <input type="button" value="Search"/> <input type="button" value="Show All"/> Page 1 of 3 <input type="text"/> <input type="button" value="To Page"/>		
	Name	Actions	Description
	AFI Annual Giving General Online Form	Options Insert	generic annual giving donation form with levels for all general donations
	Basic Donation Form	Options Insert	
	Brat Donation Form	Options Insert	donations for the kids
	BRL General Donation Form	Options Insert	BRL general funds - donation form
	Catherine's Pampering Form	Options Insert	basic with suggested levels on homepage
	EWMI General Donation Form	Options Insert	standard form for general donations
	Exercise - General Donation Form	Options Insert	General donation form for final email push for community building
	Exercise - Major Donor Donation Form	Options Insert	Major Donor donation form for final email push for community building
	General Donation Form	Options Insert	basic form with suggested levels - to be used on postcards and homepage
	KMR General Fund form	Options Insert	Basic form with suggested levels to be used for KMR General Fund on homepage
	Records 1 - 10 of 27 First Previous Next Last		

https://training100-secure.convio.com/training101/admin/LinkSelector?init=t&linkType=10448 Internet

By selecting the “Options” action you are provided with an interface to do a number of different things to update the link.



In the case of updating a link with source and sub-source codes, we want to add additional arguments onto the end of the URL. Using the Additional Arguments field, allows you to simply enter the extra s_src and s_subsrc formatting. This will render a link in that is pointing to whatever component of your site you were pointing to, with the source and sub-source information passed through.

Special Considerations

- Be Careful about Overwriting Passive Source Codes
 - ▶ Use sub-source to get more specific
- A/B Testing May Be More Appropriate for Certain Scenarios
- Set Clear Objectives First – What Information is Really Critical?
- Watch Out for Analysis Paralysis

Takeaway Points

- You Can Learn a Great Deal about How Your Engaged Constituents are Coming to Your Site by Using Source Codes
 - ▶ Gain a better understanding of how to appeal to your members online
 - ▶ Gain a better understanding of where constituents are coming to your site *from*
 - ▶ Leverage that knowledge to improve how you engage constituents in the future

Source Codes Documentation

You can use source codes to better understand the origin(s) of your constituents' interactions on your Convio powered site. When your constituents perform certain interactions on your Convio powered site Convio will automatically assign a source code. You can also take it a step further and actively assign source codes to a hyper link enabling you to set a source code for a constituent's visit to your site. To better understand these source codes, there are three pieces of information we need to look at.

- Source Code Type
- Source Code
- Sub-source code

Source Code Type

The sources are associated with a **source code type**. The source code type will be one of the following values.

- Email (original)
- Email (forwarded)
- Link with source code value
- Tell-A-Friend
- eCard
- Referrer
- Other (Not Defined)

The source code type is set based on information that is stored in the session. The code goes through a progression of checks in priority order (highest to lowest) and it will then assign the source code of the transaction based on the first source code type check that succeeds. Here is the list of checks in the order in which they are performed:

1. Did the user follow a link that was part of an eCard?
2. Did the user follow a link from a Tell-A-Friend message?
3. Did the user follow a link that was specially coded with the `s_src` argument?
4. Did the user follow a trackable link from a Convio-powered email?
5. Did the user follow a link that was specially coded with the `s_oo` argument?
(Note that the codes that are acceptable for use with this argument are provided by Convio and must be specifically generated for individual customers). These are the "Other" values that are logged.
6. If no other valid source code, and there is a "referrer" URL that initiated the Convio session that is valid (e.g. not within the same site and not a web-based mail reader), then use that as the source code.

Source Codes and Sub-source Codes

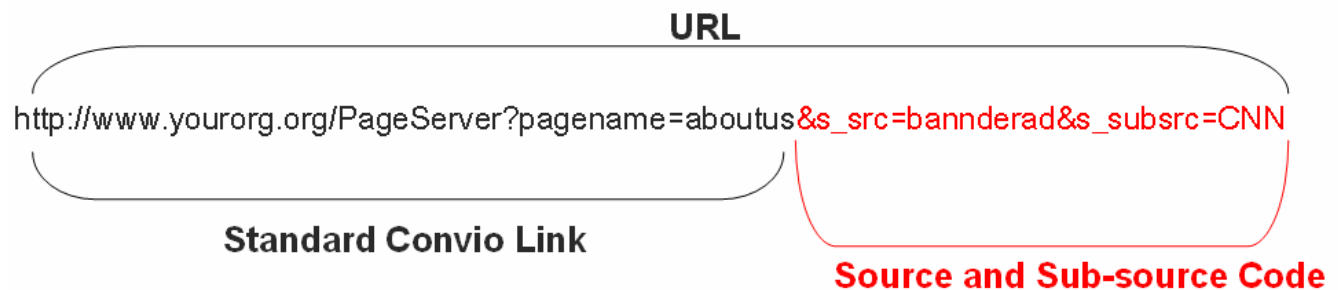
Once a source code type has been set for a given interaction, Convio then assigns a source code and it may assign a sub-source code. For each of the above listed source code types, the source codes and sub-source codes are defined as follows:

Source Code Type	Source Code	Sub-source Code
Email (original)	Name of the email message	URL of the link
Email (forwarded)	Name of the email message	URL of the link
Link with source code value	Text value passed in as the s_src argument	Text value passed in as the s_subsrc argument
Tell-A-Friend	The forwarding user's name	It will be blank
eCard	Name of the eCard campaign	Name of the Stationery Layout
Referrer	Hostname of the referrer	Path of the referrer unless it is a known search engine, in which case it will be the search terms
Other (Not Defined)	N/A	N/A

The Anatomy of a Source Code

If you would like to actively set a source code for a link, you will need to understand the anatomy of a link with a source code embedded in it. A link that has an embedded source code and an embedded sub-source code will look like this:

http://www.yourorg.org/PageServer?pagename=aboutus&s_src=bannderad&s_subsrc=CNN



A URL that will track source and sub-source is comprised of three parts

1.) Standard URL pointing to some page or form on your site

http://www.yourorg.org/PageServer?pagename=aboutus

2.) A code that sets describes the source of the user

&s_src=bannderad

3.) A code that describes the sub source of the user

&s_subsrc=CNN

Viewing Source Codes in Convio Reports

There are a variety of reports within Convio that include source code information. For each of the different types of interactions there are reports which focus on the sources of those interactions.

Interaction	Available Reports
Donation	Fundraising Analysis Report* Donations by Source Report
Action Alert	Advocacy Analysis Report* Alert Respondent Report
TeamRaiser Registration	Participant Registration Report
eCommerce	Orders by Source Code Report

**Analysis reports in Convio usually have drill down features. Use your mouse to roll over the visual graphics and click to take a closer look at that segment of data.*

Exercise: Create a URL shortcut that will track source and sub-source

Menu: *Library > URL Shortcuts*

- Enter a meaningful shortcut name in the “Shortcut” field
- Select the drop-down to the right of “Link to go to” and select “Donation Form”
- Locate a donation form that you want to point to and in the column for “actions” select “options”
- In the following screen, scroll to the bottom of the options list to the option for “Enter Additional Arguments”
- Enter in the source and sub-source formatting by entering the following:

`&s_src=value1&s_subsrc=value2`

- The source code will now be equal to “value1” and the sub-source code will be “value2”
- You can see this new source code at work by using the new URL shortcut you’ve created to visit your donation form and making a donation. Then view the Convio reports which will include source information for that donation (Fundraising Analysis Report and Donations by Source Report).

Source Codes and Email

It is important to understand that Convio is already creating a source code for actions that originate from an email message which was sent using Convio’s Email Campaign tools. You should not add the “s_src=” argument to any link inside of an email message because this will override the Convio source code which is automatically set to be the name of the email message. The best way to take advantage of source codes within Email Campaigns, is to utilize the “s_subsrc=” argument to set a sub-source code.