

Convio Source Code Best Practices

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Convio Source Codes are a means of tracking where users, transactions, and interactions came from—in short, their “source”. Source codes are automatically inserted into user, transaction, and interaction records by Convio, but they can also be overridden, using a consistent URL parameter syntax. Full documentation on source codes can be found here:

http://help.convio.net/site/PageServer?pagename=Admin_Origin_SourceSubSource_Understanding

Source Code Types:

- **Link parameters (s_src, s_subsrc)** are the most versatile way to store source codes. These can be manually added to the URL query string, or, when creating links in the Convio WYSIWYG, the interface allows an administrator to insert a source code string while creating the link. Client administrators should all know about this feature.
Best Practice: When creating links that you will syndicate to external sites, embed the entire link including source code parameter inside a URL Shortcut (from the Library menu). This essentially “hardcodes” the link, while at the same time making it much more user-friendly.
- **Email Campaigns automatically add source codes to all their links.** The Interaction/Transaction Source will be the email message name. If an administrator manually adds source codes to links in email messages, these sources will be overridden, **but it will negatively impact reporting** (see below).
Best Practice: If you wish to use manual source codes in email messages, bear in mind that the Email Clickthrough and Donations By Email Message reporting will be skewed by your manual source codes. These reports rely on the autogenerated source codes for email messages. You can, however, **preserve reporting by manually inserting the Email Message name in the s_src parameter of every link in the email message.** Client administrators must be trained to follow this procedure.
- **The referring site is automatically stored as the source code** if no other source code is stored. The Origin/Interaction/Transaction Source will be the domain of the referring site, and the Origin/Interaction/Transaction Subsource will be the path of the page on that referring site. Email Campaigns and link parameters will both override referring site source.
Best Practice: Referring sites ought to be the majority of your source codes if you’ve done little to establish source codes elsewhere. They are extremely useful in determining which of your linking sites lead to which actions, both in aggregate and in particular. However, if you notice a large, unexpected spike in referral traffic, along with a simultaneous drop in manually sourced traffic, you may have a problem with your manual source codes.
- **Default Source Code stored only if no other source exists, even referring site.** If there is no referrer in the browser—that is, the user went directly to the Convio site—and they

create a profile, interaction, or transaction, then the Default Source Code of the Survey, Action Alert, eCommerce Store, or Donation Form they filled out will be stored in their Origin, Interaction, or Transaction source.

Best Practice: Default Source Codes are a somewhat misleading term in the current product; the referrer mentioned above is really the “Default” source code, since almost all non-manually-sourced traffic will have a referrer. Default Source Codes are so low-priority that their use should be discouraged. They are not a reliable means of determining which Convio content item created a profile, interaction, or transaction.

General Usage Notes:

- Source and subsorce cannot be individually set and unset. If you try to set only `s_src`, then any existing `s_src` will be overwritten **and any `s_subsrc` code will be set to blank**. This has been identified as a product bug, and will be fixed in an upcoming release.
- Convio API methods all have “source” and “subsource” parameters
- The Site Option `SOURCE_CODE_FIRST_LINK_WINS` will prevent different source codes from being assigned during a session **while on the Convio site**. For instance, if a user clicks through an ad with source “ADBANNER”, and then clicks on a link on the Convio homepage which contains the source “HOMEPAGELINK”, then the ultimate interaction source will be ADBANNER. All subsequent source code assignments will be ignored.
- You can use JavaScript to programmatically attach source codes to all links on a page that follow a particular rule. This technique is only useful if `SOURCE_CODE_FIRST_LINK_WINS` is set to `FALSE`, so that Convio can reset the source code during a Convio session, before the interaction/transaction/profile is created.

Example: Let’s say you want to track on what page the user decides to stop looking at PageBuilder pages or StoryBuilder stories, and goes to a donation form. This JavaScript snippet will, if placed in the pagewrapper, change all links to Donation forms so that they record the page on which they were clicked in the Interaction/Transaction/Profile Source.

```
/**
 * Adds the current page title as the Source Code of all links to
 * Donation Forms.
 * Uses the utils.js JavaScript library present on every Convio page.
 */
addOnLoadHandler(function() {
    var allLinks = document.getElementsByTagName('a');
    for (var i = allLinks.length - 1; i >= 0; i--){
        if (allLinks[i].href.indexOf('Donation2')!==-1) {
            allLinks[i].href =
appendToUrl(allLinks[i].href, 's_src', encodeURIComponent(document.title.
substring(document.title.indexOf(':'), document.title.length)));
        }
    };
});
```