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

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?

<table>
<thead>
<tr>
<th>Interaction</th>
<th>Available Reports</th>
</tr>
</thead>
<tbody>
<tr>
<td>Donation</td>
<td>Fundraising Analysis Report, Donations by Source Report</td>
</tr>
<tr>
<td>Action Alert</td>
<td>Advocacy Analysis Report, Alert Respondent Report</td>
</tr>
<tr>
<td>TeamRaiser™ Registration</td>
<td>Participant Registration Report</td>
</tr>
<tr>
<td>eCommerce</td>
<td>Orders by Source Code Report</td>
</tr>
</tbody>
</table>
Active Source Codes

- Administrators Can Create Source Codes
  - Involves appending extra information onto links that point to your 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
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.
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:
By selecting the “Options” action you are provided with an interface to do a number of different things to update the link.

<table>
<thead>
<tr>
<th>Name</th>
<th>Actions</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>AFI Annual Giving</td>
<td>Options</td>
<td>generic annual giving donation form with levels for all general donations</td>
</tr>
<tr>
<td>General Online Form</td>
<td>Insert</td>
<td></td>
</tr>
<tr>
<td>Basic Donation Form</td>
<td>Options</td>
<td></td>
</tr>
<tr>
<td>Insert</td>
<td></td>
<td></td>
</tr>
<tr>
<td>BRL Donation Form</td>
<td>Options</td>
<td>donations for the kids</td>
</tr>
<tr>
<td>Insert</td>
<td></td>
<td></td>
</tr>
<tr>
<td>BRL General Donation Form</td>
<td>Options</td>
<td>BRL general funds - donation form</td>
</tr>
<tr>
<td>Insert</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Catherine’s Pampering Form</td>
<td>Options</td>
<td>basic with suggested levels on homepage</td>
</tr>
<tr>
<td>Insert</td>
<td></td>
<td></td>
</tr>
<tr>
<td>EWMI General Donation Form</td>
<td>Options</td>
<td>standard form for general donations</td>
</tr>
<tr>
<td>Insert</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Exercise - General Donation</td>
<td>Options</td>
<td>General donation form for final push for community building</td>
</tr>
<tr>
<td>Insert</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Exercise - Major Donation Form</td>
<td>Options</td>
<td>Major Donation form for final email push for community building</td>
</tr>
<tr>
<td>Insert</td>
<td></td>
<td></td>
</tr>
<tr>
<td>General Donation Form</td>
<td>Options</td>
<td>basic form with suggested levels - to be used on postcards and homepage</td>
</tr>
<tr>
<td>Insert</td>
<td></td>
<td></td>
</tr>
<tr>
<td>KMR General Fund Form</td>
<td>Options</td>
<td>Basic form with suggested levels to be used for KMR General Fund on homepage</td>
</tr>
</tbody>
</table>
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:

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

### 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=bannerad&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=bannerad
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.

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*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.