

# How to: Use Activist Codes

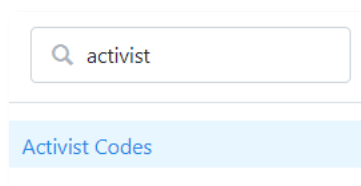
**Activist Codes** are labels applied to contact records used to track groups of individuals or organizations that share interests or specific relationships. Once an Activist Code is applied to a contact record, a person can easily find information related to the code such as group affiliations, subscriptions, licensures, or memberships.

Activist Codes also track donor support making this feature useful in organizing critical information on contact records. Activist Code Reporting is another feature that helps manage code information for quick referencing.

[Read more about Activist Codes](#)

## Creating Activist Codes

Locate **Activist Codes** by searching in the **Sidebar**, or using the **Main Menu** to find **Activist Codes** under **Codes-Questions-Scripts** in the **Administration Menu**



From the **Activist Codes** list page, select **Add New Activist Code**

ADMIN SETTINGS

## Activist Codes

Export To Excel Add New Activist Code

Type  Scope  Activist  Status

Count  Committee  Long Name  Engagement Type

Remember Filters Refresh Results

ID	Type	Long Name	Medium	Short	Scope	Activist
4307163	Activism	<a href="#">Declaw Ban</a>	Declaw	DCB	Private	<input checked="" type="checkbox"/>
4324996	Activism	<a href="#">Fight for 15</a>	FFor15	F15	Private	<input type="checkbox"/>

## Choosing your settings

### Selecting Activist Code Type

- The choices you have for **Activist Codes** vary depending on your package and settings. Changes to or requests for **Activist Code Types** can be considered upon request to the State or Site Administrator.
- Selecting an **Activist Code Type** simplifies sorting and managing your **Activist Codes**. For example, the **Email Interest type** is used for subscription purposes. When supporters select unsubscribe in a **Targeted Email** or update their email on your self-service page, they will be given the option of opting out of all emails or specific lists.

Activist Code Type\*

- Activism
- Activist
- BSD Tools
- Campaign
- Constituency
- Contactability
- Donor
- Email Interests
- Events
- General
- Issues
- Member
- Misc
- Outreach
- Planned Giving
- Region
- Roles
- Salesforce Sync
- Volunteer

## Choosing **Naming Conventions**

- The system chooses between **Long Name**, **Medium Name**, and **Short Name** based on the fit of a particular display. It displays the **Long Name** whenever possible, the **Medium Name** when space is an issue (such as on Reports and Mobile Devices), and the **Short Name** when space is limited (such as in column headings on Canvass Results).

## Adding a **Description**

- The **Description** field explains details about the **Activist Codes** and defines what is meant to be understood about the assigned voter. The description can only be viewed on the Administration page.

## Applying **Script Questions**

- **Script Question** is an optional feature added to the canvasser's walking or calling **Script** on **MiniVAN** (or printed **Report**) if the user wants to ask voters questions such as "Would you be willing to take a yard sign?"
- If you have access to Scripts, you can use Activist Codes to create a **Script** for a **Virtual Phone Bank** and response tracking.

## Determining **Scope**

- **Scope** determines who can see the records that have the Activist Code assigned to them. This is typically used in organizations that are working with voter files. A **public or private Activist Code** determines who can see the voters that have the Activist Code assigned to them.
- Applying a **public Activist Code** to a voter allows every user on the site with access to that voter to see the Activist Code.
- Applying a **private Activist Code** to a voter only allows users on the same Committee to see the Activist Code for that voter.

## Understanding **Activist Settings**

- While these people will have an Activist Code, there is no reason to assume that they are political activists. Thus, "**Is Also Activist**" distinguishes between people who have this Activist Code and those who are considered true activists on this issue or cause.
- On the **Create a List** page, a user may select all Activist Codes marked "**Is Also Activist**" at one time rather than creating separate lists by using the **Activist Code picker**.

## **Assigning or Removing** Activist Codes

- "**Can be assigned or removed**" allows the Activist Code to be assigned or removed from a contact record and is checked by default. There may be instances where removing the ability to add or remove the Activist Code from records after its been applied, for example, restricting assignment or removal would be appropriate for ballot language requests or party delegates. Un-checking the option after the initial group is set will make the Activist Code available for searching and reporting but not modifiable unless you are an administrator for your committee.

## Designating **Official Types and District Roles**

- **Official Types and District Roles** associates the Activist Code with specific types of advanced organizational designations for voters.

## Assigning **multiple designations**

- **Multiple assigned designations** are useful in tracking engagement levels, such as when someone makes multiple requests for planned giving information. If you apply the Activist Code when they make a request (through forms, mailers, or direct requests), you will then have a record of their interest level.
- Multiple assignment used in conjunction with **District Roles** options enables the assignment of multiple unique districts. For example, this could be used to specify each of the districts a volunteer or staffer is engaged.

## Choosing **Status**

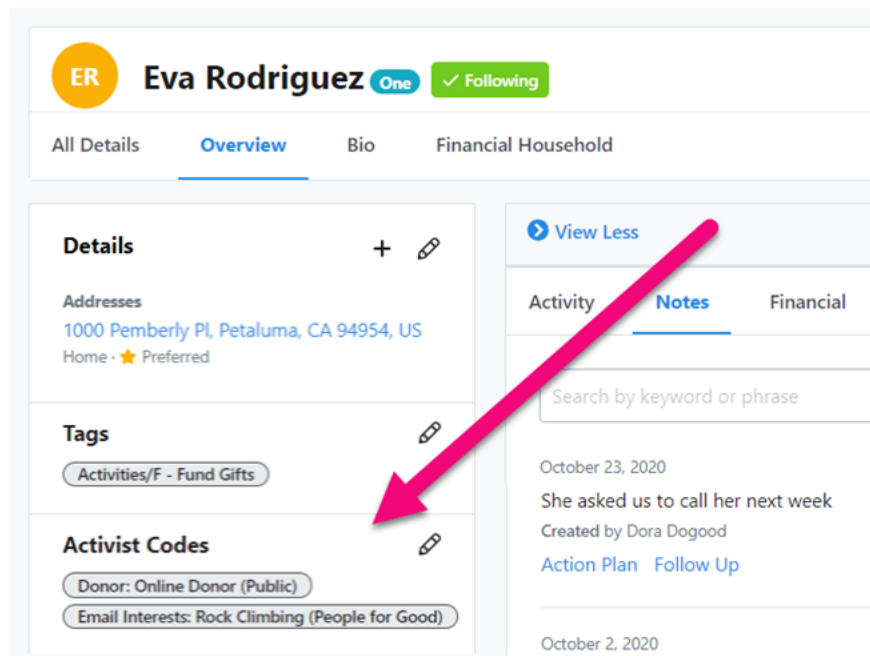
- **Status** determines the visibility and usage of the Activist Code. By default, Activist Codes default to **Active**. An **Archived Activist Code** can still be used in searching, however it will not appear on normal lists. An **Inactive Activist Code** will no longer appear on the site unless an administrator reactivates it.

## Identifying **Owner committee**

- The **Owner committee** records which committees created the Activist Code. In most cases, this will never change and is **set to default**.

# Manually adding Activist Codes to contact records

Select the voter record, from the **Overview**, select the pencil icon to edit the **Activist Code section**, add codes from the dropdown menu, and **Save**



Or, add **Activist Codes** from the **All Details page** by scrolling to the Activist Codes page section and choosing Activist Codes from the dropdown menu, and **Add New**

Activist Codes		
Activist Codes	District	Date
Activist: Yard Sign		8/18/16
<input type="text"/>		<a href="#">Delete</a>  <a href="#">Save New</a>
<a href="#">Add Multiple Activist Codes</a>		

It is possible to **add multiple Activist Codes** using either selection workflow by repeating the process.

## Using Online Actions forms to apply Activist Codes

**Activist Codes** automatically apply to any contacts who fill in an **Online Actions form**. Add Activist Codes from the **Basics step** in the **Track Your Efforts** section, which applies the code to anyone who submits your form.

Track Your Efforts

Source Code

Activities ✕
▼

Activist Codes

- Activism: Declaw Ban
- Activism: Fight for 15
- Activism: Food Banks
- Activism: Gun Control
- Activism: Money Out of Politic
- Activism: Multi
- Activism: Save Arctic

You can also add individual Activist Codes from the **Build Page > Interests** or **Build Page > Additional Information**.

Interests

Section Title

Interests

Activist Code	Field Label
Default Value	
<div style="display: flex; align-items: center;"> <span>☰</span> <input type="text" value="Activism: Food Banks"/> </div>	<input type="text" value="Food Banks"/>

[+ Add Activist Code](#)

[Read more about creating Online Actions forms](#)

[Read more about adding Questions to online forms](#)

## More ways to apply Activist Codes

- Apply Activist Codes to responses in **Virtual Phone Bank** or **MiniVAN**
  - [Read more on using Activist Codes with Scripts](#)
- Manually apply Activist Codes during **Data Entry**
  - [Read more about Data Entry](#)
- Apply Activist Codes using **Bulk Apply** or **Bulk Upload**
  - [Read more on applying Activist Codes with Bulk Apply and Bulk Uploader](#)
- Use **Automation** to automatically apply or remove Activist Codes from contacts who are part of a workflow
  - [Read more about Automation](#)

## Searching on Activist Codes

To build a list including the **Activist Codes** the **User's Committee** has access to, use the Activist Code section of **Create a New List** to include only people with specific Activist Codes applied to them in the system.

Once you have selected an Activist Code to search, there are additional options to choose that allow you to **refine your search** based on metrics like the date the Activist Code was entered or who entered the information.

▼ **Activist Codes**

Activist Code Campaign: Global Warming (People for Good) ▾

Input Type ▾ Contact Type ▾

Contacted By

Entered by ▾

Date Contacted --Select a Date Range Type-- ▾

Date Entered --Select a Date Range Type-- ▾

The dropdown in **Create a List** can only display up to 30 codes. To see the entire list, click on the **blue Field Name** rather than the dropdown menu. This will take you to a page that displays all of your Activist Codes.

**By default**, the list is sorted by **Activist Code Type**. Click on any of the other headings to sort the list.

CUSTOM

▼ **Activist Codes**

Activist Code

➤ **Addresses**

➤ **Age • Registration Date**

➤ **Attached Files**

➤ **Automation**

➤ **Contact Status**

➤ **Contribution Summaries**

➤ **Contributions**

Activist Codes do not have dates on them since they are intended to be a more static condition than items like **Survey Questions** which are used to track varying conditions or changes over time. However, it is possible to create a list that is narrowed to when certain activist codes were applied. This might be useful if you would like to find older records.

## Viewing Activist Codes on the contact record

For performance reasons, the **Activist Code list** does not automatically display the counts for all the Activist Codes on the list. To see the number of records assigned Activist Codes, find the count drop down box on the Activist Code list page and select **On**. Refresh to see how many voters have been assigned the Activist Codes. **Use the filters** at the top of the page to limit the number of Activist Codes the system must calculate to speed page loading.

## Deleting an Activist Code

Activist Codes can be removed from a record. If you do not see the option to remove an Activist Code, please follow up with your administrator and provide them with the information they will need to remove this Activist Code for you. Your administrator will likely request the name of the record, the VAN ID, and Activist Code you would like removed. Users with the correct permissions can also **delete Activist Codes** in bulk using the **Bulk Upload tool**.