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# Using Source Codes and Subsource Codes in Luminate Online

Presented by  
BLACKBAUD CUSTOMER SUCCESS





# Hi!

I'm Erik Leaver  
Customer Success Manager, Senior

Joined Blackbaud: 2016

Based: Washington, DC

- Worked in non-profits for two decades
- Love being outdoors, especially bicycling
- I don't track my wife or my two children



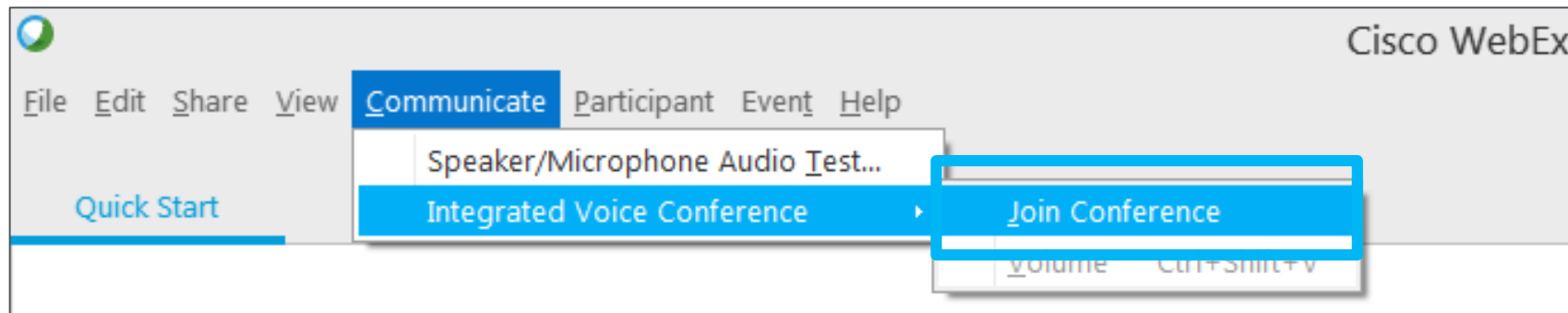




# Connecting to Audio

If you have not already joined the Audio conference, follow these steps:

1. Click **Communicate** on the menu bar
2. Select **Integrated Voice Conference**
3. Click **Join Conference**



Note: If you see **Leave Conference**, you're already connected!





# Join the conversation

Ask questions and add your expertise through **Chat**:

The screenshot shows a web interface with a chat feature. On the left, there are several green geometric shapes. In the center, a white box with a blue border contains the text "Send your question to **All Panelists**". At the bottom, there is a toolbar with five circular icons: a microphone, a person icon, a chat bubble icon (highlighted with a blue box), a three-dot menu icon, and a red close icon. To the right of the toolbar is a green circular logo with a white 'b' and a right-pointing arrow. On the right side of the interface, there is a chat window titled "Chat" with a close button. The chat window shows "To: All Panelists" and a text input field with the placeholder "Enter chat message here". A blue callout line connects the highlighted chat icon in the toolbar to the chat input area.



# Agenda

- 1 Introduction to Source Codes
- 2 Using Source Codes
- 3 Reporting on Source Codes
- 4 Final Thoughts and Questions



# Introduction to Source Codes



# What is a Source Code?

## Source Code

A source code is a mechanism for determining the origin of users who do something on your Luminate web, donation, or advocacy pages.

Source Codes can be recorded when a user:

- Clicks a link on a PageBuilder page
- Makes a donation
- Responds to an action alert



# Why Use a Source Code?

- Understand **where** your constituents come from
- Understand **what** drives action on your site
- Identify the **effectiveness** of ads hosted on external sites (Google AdWords, Facebook ads, banner ads, etc.)
- Leverage that knowledge to **improve** how you engage with your constituents in the future.





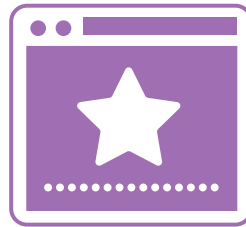
# Why Use a Source Code?

Organizations will focus on different uses of Source Codes depending on their strategic objectives:



## Channels

What channels (Facebook, Email, Twitter, Direct Mail, etc.) are driving supporters to action?



## Areas of Your Site

Which areas of your site (About Us, Get Involved, etc.) are driving supporters to action?



## Areas of Your Emails

Which areas of your emails (newsletters, fundraising, advocacy, etc.) are driving supporters to action?



**Source codes won't solve all of your tracking problems.**  
There will always be some mystery traffic that comes in without a source code.

But source codes provide more visibility into the success of various tactics than you will get without them.



# Using Source Codes

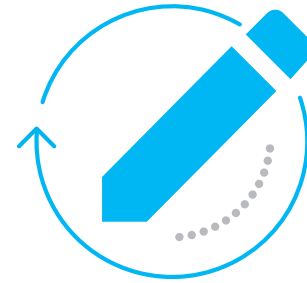


# Types of Luminate Source Codes



## Passive Source Codes

Interactions that are *automatically* tracked in Luminate.



## Active Source Codes

Admin/Staff created *custom codes* to track user activities.





# Passive Source Codes

## Passive Source Code

Interactions that are ***automatically*** tracked in Luminate Online.

- Donations
- Action Alerts
- Survey Responses
- TeamRaiser Registrations
- eCommerce purchases
- Event RSVP's
- Ticket Sales
- Site Registrations





## Passive Source Codes

Source Code Type	Source Code	Subsource Code
Email (original)	Name of the email message	URL of the link
Email (forwarded)	Name of the email message	URL of the link
Tell-A-Friend	The forwarding users name	blank
eCard	Name of the eCard Campaign	Name of Stationery
Referrer	Hostname of the referrer	Path of referrer / search engine





# Passive Source Codes

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Email (forwarded)	Name of the email message	URL of the link
Tell-A-Friend	The forwarding users name	blank

LAST	FIRST	CAMPAIGN_NAME	FORM_NAME	DONATION_TYPE	SOURCE_TYPE	SOURCE_CODE	SUBSOURCE_CODE
Jake	Sally	Jake's Event Donation Campaign	Jake's Event Donation Form	Donation	E-mail	JAKE TEST 2	<a href="http://vateam.convio.net/site/PageServer?pagename=homepage_old">http://vateam.convio.net/site/PageServer?pagename=homepage_old</a>
McZaika	Matty	marcus_donation_campaign	marcus_donation_form	Donation	Forwarded E-mail	Marcus TeamRaiser	<a href="http://vateam.convio.net/site/TR/Events/General?fr_id=8960&amp;pg=entry">http://vateam.convio.net/site/TR/Events/General?fr_id=8960&amp;pg=entry</a>
Taylor	Peyton	Peyton's Test Campaign	DDFL Test	Donation	Tell-A-Friend	Peyton Taylor	





# Active Source Codes

## Active Source Code

Administrator created *custom codes* to track user activities.

- Track traffic coming in from external sites:
  - Partner Organizations
  - Paid Ads
  - Social Media
  - Direct Mail
- Track the effectiveness of different aspects of your site:
  - Different pathways to the same form (ex. Navigation, modal box, slider, etc.)
- Track the effectiveness of different aspects of your emails:
  - Different pathways to the same form (ex. sections of an email)





# Active Source Codes

Ask your Member of Congress

← → ↻ 🏠 [https://secure.feedingamerica.org/site/Advocacy?pagename=homepage&page=UserAction&id=141&s\\_src=W167ORGSC](https://secure.feedingamerica.org/site/Advocacy?pagename=homepage&page=UserAction&id=141&s_src=W167ORGSC) ☆

Apps + Erik Leaver's RSS Feed Wunderlist Evernote Salesforce Meebee Workday Perusable

FEEDING AMERICA

Need Help Sign Up

HUNGER IN AMERICA ABOUT US TAKE ACTION FIND A FOOD BANK

## Ask your Member of Congress to visit a food bank

The best way to help legislators understand the scope of hunger in America is to see it for themselves.

With Child Nutrition Reauthorization right around the corner, help us urge Members of Congress to visit a food bank in their district to see how these programs are making an impact in your community.

**Your information**

- Required fields
- Title:
- First Name:

**Message**

Visiting a food bank

Dear Representative/Senator,

- Personalize your message

As my Member of Congress, you have a unique ability to help Americans struggling with hunger, either by supporting funding for federal hunger-relief programs or by bringing attention to the great work being done in

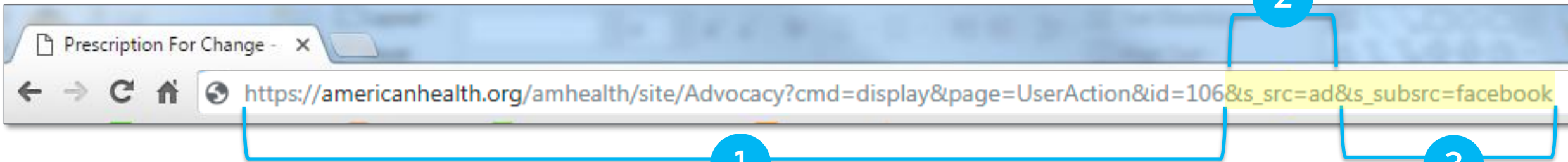




# Active Source Codes: Anatomy

A link that has an embedded source code and an embedded subsource code is comprised of three parts:

A code that describes the **source**:  
*&s\_src=ad*



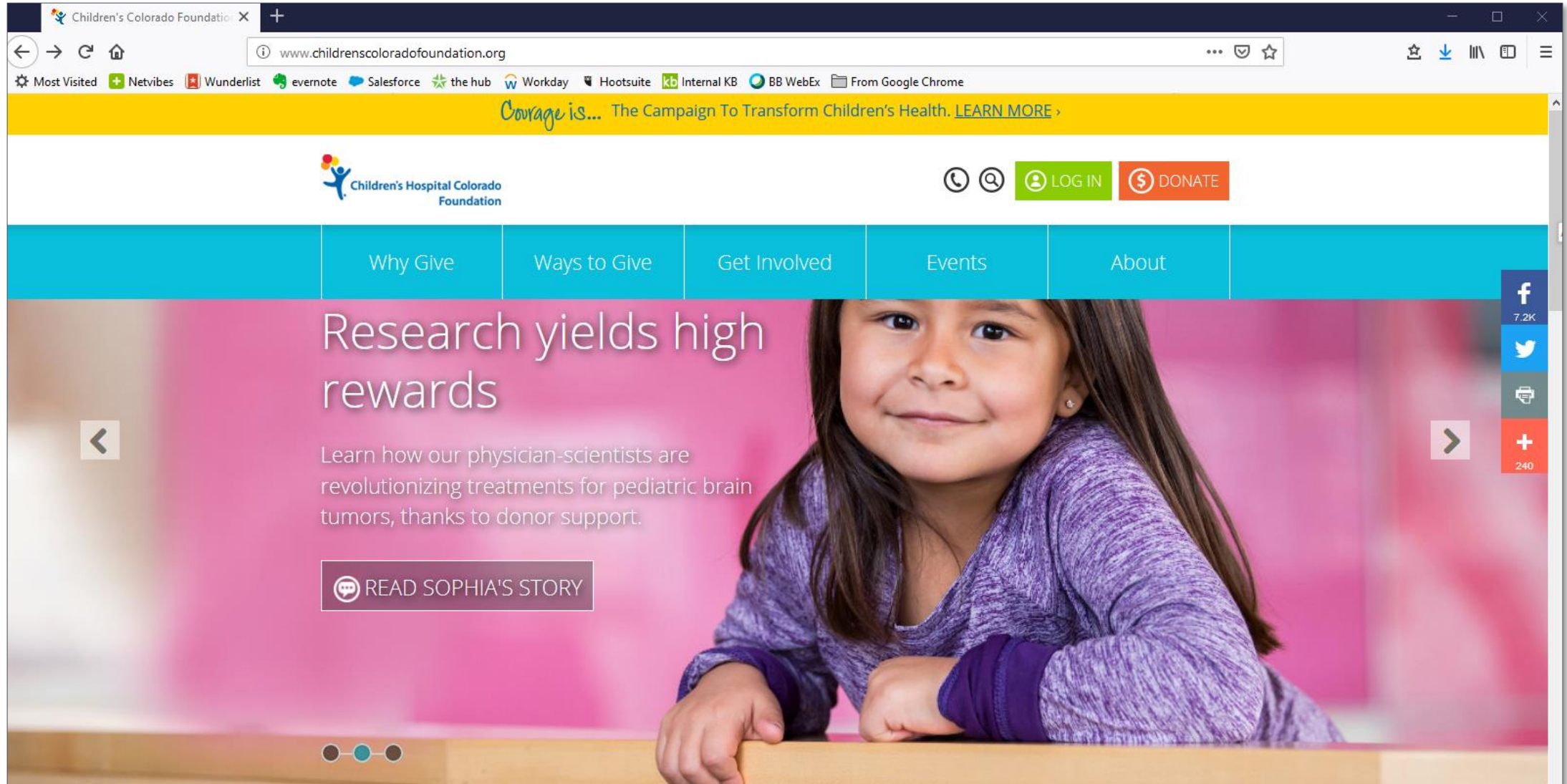
**Standard URL** pointing to some page or form:  
*http://americanhealth.org/amhealth/site/Advocacy  
?cmd=display&page=UserAction&id=106*

A code that describes the **subsource**:  
*&s\_subsrc=facebook*





# Active Source Codes: Example







# Active Source Codes: Example

Donate to Healthy Futures - Ch. X

+

←

→

↺

🏠

🔒

https://secure.childrenscoloradofoundation.org/site/Donation2?df\_id=1660&1660.donation=form1

⋮

🔒

☆

⚙️ Most Visited

➕ Netvibes

📌 Wunderlist

📁 evernote

☁️ Salesforce

🌱 the hub

📅 Workday

📧 Hootsuite

kb Internal KB

🌐 BB WebEx

📁 From Google Chrome

🔒 SSL ENCRYPTION



Children's Hospital Colorado  
Foundation

Returning User?  
[Login](#)

## Thank you for your support!

When you give to Children's Hospital Colorado Foundation, you are helping to advance patient care, education, research and advocacy at Children's Hospital Colorado, one of the top children's hospitals in the nation. Because of you, Children's Colorado delivers some of the best health outcomes in the country, offers the most innovative treatments, and gives all children a chance to live long, healthy lives.

\$50

\$500

\$100

\$1,000

\$200

\$ Other

☐ Make this a monthly donation ?

☐ Yes, this is an honor or memorial gift



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# Active Source Codes: Example

Donate to Healthy Futures - Ch X

+

←

→

↺

🏠

🔍

https://secure.childrenscoloradofoundation.org/site/Donation2?df\_id=1660&1660.donation=form1&s\_src=web&s\_subsrc=header

⚙️ Most Visited

➕ Netvibes

📅 Wunderlist

🌿 evernote

☁ Salesforce

🌱 the hub

🔗 Workday


📧 Hootsuite

📖 kb Internal KB

💻 BB WebEx

📁 From Google Chrome

🔒 SSL ENCRYPTION

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## Thank you for your support!

When you give to Children's Hospital Colorado Foundation, you are helping to advance patient care, education, research and advocacy at Children's Hospital Colorado, one of the top children's hospitals in the nation. Because of you, Children's Colorado delivers some of the best health outcomes in the country, offers the most innovative treatments, and gives all children a chance to live long, healthy lives.

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\$ Other

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# Active Source Codes: Special Considerations

- Be careful about overwriting passive source codes
  - Use Subsource codes to get more specific
- A/B testing may be more appropriate for certain scenarios
- Set clear objectives first – know what and why you are tracking something
- Make sure you know which source code is which
- Watch out for analysis paralysis



# Reporting on Active Source Codes



# Reporting: Source Codes

What Luminate reports track source codes?

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



# Donation Form Analysis Report

Reports Classic

Report Writer

Report Results

Configure Report Options

Campaign Analysis Report

Report Date: Jul 1, 2016

Campaign/Donation Form Selection:

(includes Donations 2.0 Campaigns and Donations Classic forms)

--- Report on all campaigns/donation forms ---  
AF - Children's Hospital Colorado Foundation (ID: 1583)  
AF Capital Campaign (ID: 1345)  
AF Scientists Retreat Public Donation Form (ID: 1444)  
Annual Campaign (ID: 1201)

Analysis Dimension:

Analyze by Donation Form and Donation Level ▾  
Analyze by Donation Form and Donation Level  
In Analyze by Constituent Creation Date  
Analyze by Date of First Gift  
Analyze by Geography  
N Analyze by Constituent Origin  
Analyze by Email Message  
In Analyze by Premium Selected  
Analyze by Online vs. Offline  
In Analyze by Donor Status  
Analyze by Advocacy Status  
Analyze by Source Code

Donation Date:

☒ Predefined Date Range: All Dates ▾  
☐ Custom Date Range: Jan ▾ 1 ▾ 2016 ▾ to: Jul ▾ 1 ▾ 2016 ▾



# Advocacy Analysis Report

Reports Classic

Report Writer

Report Results

Configure Report Options

Advocacy Analysis Report

Report Date: Jul 1, 2016

Available Alerts:

- Health care for children - SC (ID: 170)
- JH - All Children Deserve Healthcare! (ID: 168)
- JV - All Children Deserve Healthcare (ID: 166)
- AF All Villagers Deserve Healthcare! (ID: 164)

☐ All action alerts

Analysis Dimension:

- Analyze by Alert name, Recipient Type and Recipient Name
- Analyze by Alert name, Recipient Type and Recipient Name
- Analyze by Recipient Type, Recipient Name and Alert Name
- Analyze by State, City and ZIP
- Analyze by State, Federal District ID and ZIP
- Analyze by State, State House District ID and ZIP
- Analyze by State, State Senate District ID and ZIP
- Analyze by Donor Status
- Analyze by Source Code

Interpretive to Chart:

All Responses

Response Date:

☒ Predefined Date Range:

All Dates

☐ Custom Date Range:

Jan

1

2016

to:

Jul

1

2016





Other Constituent Actions

Donor Actions

**Actions Processed by Channel**

One constituent action can lead to multiple channel actions being processed.

**1,263**

Emails

**11**

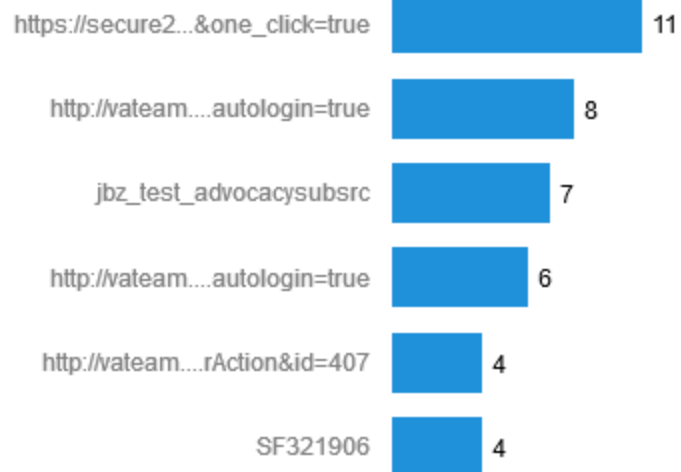
Calls

**11**

Printouts

**184**

Faxes

**Top Actions by Sub-Source**[View All](#)**Actions by Location**



# Sample EOY Campaign



# Sample: 2018 End of Year Campaign

Marketing Channel	Marketing Effort	Marketing Date	SOURCE_CODE	SUBSOURCE_CODE
Website	Lightbox	12/17-12/31/2018	Web	2018EOY-Lightbox
Website	Top Ribbon	12/1-12/31/2018	Web	2018EOY-Top_Ribbon
Website	HomeSlider	12/1-12/31/2018	Web	2018EOY-Home_Slider
Social	FB_Ads	12/1-12/31/2018	FB	2018EOY-Ad_LYBNTY
Social	FB_Posts	12/17/2018	FB	2018EOY-Post_12-17-1
Social	FB_Posts	12/17/2018	FB	2018EOY-Post_12-17-2
Social	TW_Posts	12/31/2018	TW	2018EOY-Post_12-31-1
Email	EOY #1-Donors EOY #1-	12/17/2018		2018EOY-EM-1-Donor
Email	NonDonors	12/17/2018		2018EOY-EM-1-ND
Email	EOY #2-Donors EOY #2-	12/26/2018		2018EOY-EM-2-Donor
Email	NonDonors	12/26/2018		2018EOY-EM-2-ND



# Final Thoughts



## Key Points

- Use Source & Subsource codes to understand where your actions are coming from
- Keep track of the codes you use
- Don't get paralyzed with your analysis



# Additional Resources



## Training

Register for interactive courses and best practice workshops through [Blackbaud University](#).



## Community

Connect with other users and stay updated on new features on our [Blackbaud Community](#).



## Support

Chat with our [Support Team](#) if you have any additional questions or issues.



# Additional Resources

- Help Resource: [Track Site Interactions with Source Codes](#)
- Knowledgebase Article: [What is the difference between an origin source code and a donation/interaction source code?](#)
- Knowledgebase Article: [How do I add a source code to a donation form link?](#)
- Community Discussion: [Source Code 101](#)



Questions?



Thank you!

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