Feature Summary: Advocacy Contact Fields

Module: Advocacy

Release: Fall 2010
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Overview

In 2008, Convio introduced new layouts that supported the ability for clients to reduce the number of constituent fields that are collected on an Action Alert when there is a custom target. In this release, Convio is adding additional flexibility to the number of required constituent fields for all targets. This additional flexibility will enable clients to lower the barrier to participation on a greater number of forms (by reducing the number of contact information fields that a constituent must fill out).

Key Features & Benefits

Features
- Actions that target the White House no longer require Title, Street, City, or State
- Phone number field may be hidden on all forms, regardless of target

Benefits
- Greater participation in action alert campaigns; faster email house file growth.

Considerations for Clients

- There is a tension between lowering the barrier to participation and increasing the impact of constituent communications; Convio encourages organizations to be cautious about decreasing the "quality" and perceived legitimacy of their constituent communications by not including full address in the message that is delivered.
- For White House forms, there is a chance that the fields required by the Obama webform could be changed. That could cause our clients' messages to fail, unless they add the required fields back onto the forms. This would need to be performed by an admin, manually, on a form-by-form basis.
- Existing action alerts will not be impacted by this feature. Any desired changes to existing action alerts would need to be configured by an administrator.

Feature Configuration

To customize contact fields, you must have advanced layouts enabled for an Action Alert.

1. Make sure Advanced Layouts are enabled (**Yes, Enable Layouts and Themes** is selected) on the Design Alert page.

2. In Step 5 of the Action Alert process flow, Select Contact Fields, specify whether each contact field is required, optional, or hidden. Fields that are required by the selected target are grayed out so you cannot change them. Consequently, the contact fields that you can configure will vary by target. To illustrate this point, in the example below, you can see the contact fields that you can configure when the President is selected as a target. Because the White House requires First Name, Last Name, Email, and Zip, those fields are grayed out.

Target – President

Contact Fields for the President

The following table lists all the contact fields by target and whether they can be set as Required, Optional, or Hidden.

Title	First Name	Last Name	Street 1	Street 2	City	State	Zip	Country	Phone	Email
Federal Officials - White House (President, Vice President, and First Lady)										
ROH	R	R	ROH	OH	ROH	ROH	R	OH	ROH	R
Federal Officials - US Congress, Federal Cabinet, Federal Agency, Federal Presidential Candidate, Regulations.gov, and Federal Reserve.gov										
R	R	R	R	OH	R	R	R	OH	ROH	R

State Officials - Governor, State Senator, State Representative, Lt. Governor, or State Agency										
R	R	R	R	OH	R	R	R	OH	ROH	R
Custom Targets										
ROH	R	R	ROH	OH	ROH	ROH	ROH	ROH	ROH	R

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