

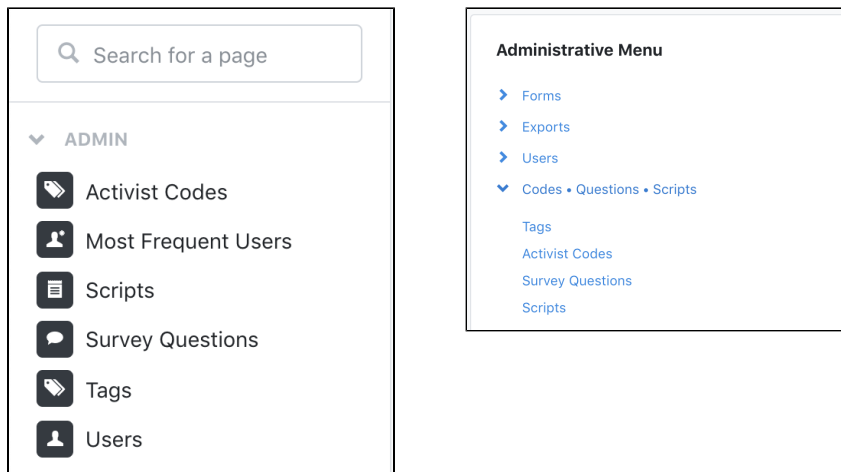
Local Managers: Creating State- and Center-Specific Activist Codes

Activist codes in [EveryAction](#) are primarily used by Audubon to indicate interests and affiliations that are relevant to anyone at Audubon.

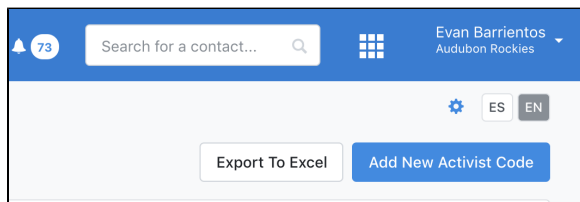
Example: Audubon Rockies has a program called "**Habitat Hero**" about native plants.. The Habitat Hero branding has **local relevance** to Audubon Rockies staff, but to the National Plants for Birds team, it may have less relevance. That's why it's important to add the "**Native Plants - interest**" activist code to the records of Habitat Hero participants, because that information has **universal relevance** (to Audubon).

However, it may be useful for clearer segmentation for the Audubon Rockies team to also have a "Habitat Hero" activist code that ALSO would be applied to the records of these people. For this reason, "**Local Manager**" users in [EveryAction](#) have the ability to create Activist Codes specific to their programs and affiliations. Here's how to do that.

To navigate to the [Activist Code administration page](#), you can either use the "Admin" section of the "home" page, or the same in the left-side menu of any page.



The "Add New Activist Code" button is in the top-right of the page.



There are four required fields: **Type**, and three names, **Long**, **Medium**, and **Short**.

The image shows the 'Add New Activist Code' form. It has several fields: 'Activist Code Type*' is a dropdown menu with 'Bird Friendly Comm' selected; 'Campaign' and 'Engagement Type' are also dropdown menus; 'Long Name*' has two input fields, the first containing 'Habitat Hero - inter' and the second with '(Español)' next to it; 'Medium Name*' has two input fields, the first containing 'HabHeroIn' and the second with '(Español)' next to it; 'Short Name*' has two input fields, the first containing 'HHI' and the second with '(Español)' next to it.

Some conventions: Audubon's activist codes often have a sort of "engagement type" tacked on to the end after a hyphen. Common ones are:

- interest
- action (to be applied AFTER a completed action in the pre-hyphen topic or program)
- donated
- only (to indicate someone wants ONLY communications about the pre-hyphen topic or program)

- no (to indicate someone DOES NOT want communications about the pre-hyphen topic or program)

Not all Activist Codes have these sub-type indicators, but it's useful to have them when they're relevant. Note that these are (a) conventions primarily for the LONG name, and (b) often get cut off due to character limits, as they were in our current example. Just use sound judgement and do your best.

Scrolling down, you'll see some additional settings.

Scope
☒ Private
☐ Public

☐ Is Also Activist

☒ Can Be Assigned or Removed

☐ Can Be Assigned Multiple Times

Status
☐ Inactive
☒ Active
☐ Archived

Owner Committee*

Audubon Rockies

Usually you can leave these as-is. The most notable exception would be "Can Be Assigned Multiple Times" which may be useful if you're using an activist code to indicate an action that can be done more than once, AND it's important for people to see that fact, AND it's an action where the repetition can't be captured in other ways, such as Event Participations, Online Actions submissions, Survey Questions, etc. But you should weigh this consideration against the downside, which is cluttering up the activist code section of a contact record with a lot of the same code.

The Public/Private Scope choice is a bit counter-intuitive: all it means is that when it's applied to a record, the Activist Code "remembers" which committee it's applied in, and if you're using "Committee Sharing" being applied in more than one committee can override the setting for multiple applications being off. Since these codes will generally be in one committee only anyway, it's fine to leave it Private.

Status: Determines where and how the **Activist Code** appears and can be used. By default, **Activist Codes** start out as *active*. An *archived Activist Code* can still be used in searching. However, to avoid clutter, it does not appear on normal lists. An *inactive Activist Code* will no longer appear on the site unless an administrator reactivates it.

The "Save" button is in the bottom left corner, as it tends to be. Click that, and your new Activist Code is ready to go!

IMPORTANT NOTE: When you're applying this active code, **don't forget to also apply the more universally relevant activist code** (in this example, that would be the "Native Plants - interest" code).