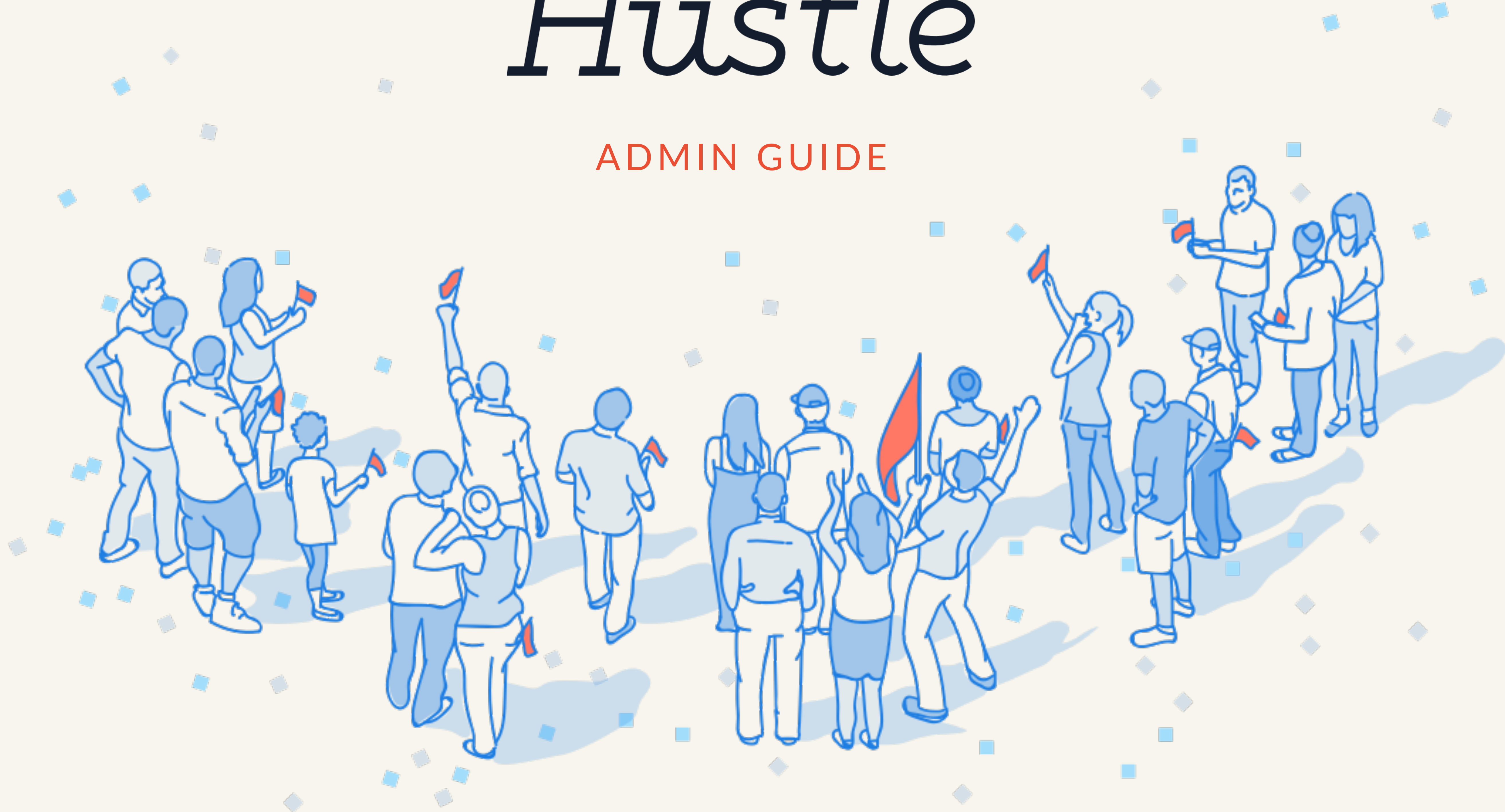
Hustle

ADMIN GUIDE



STEP 1

Accessing the admin panel

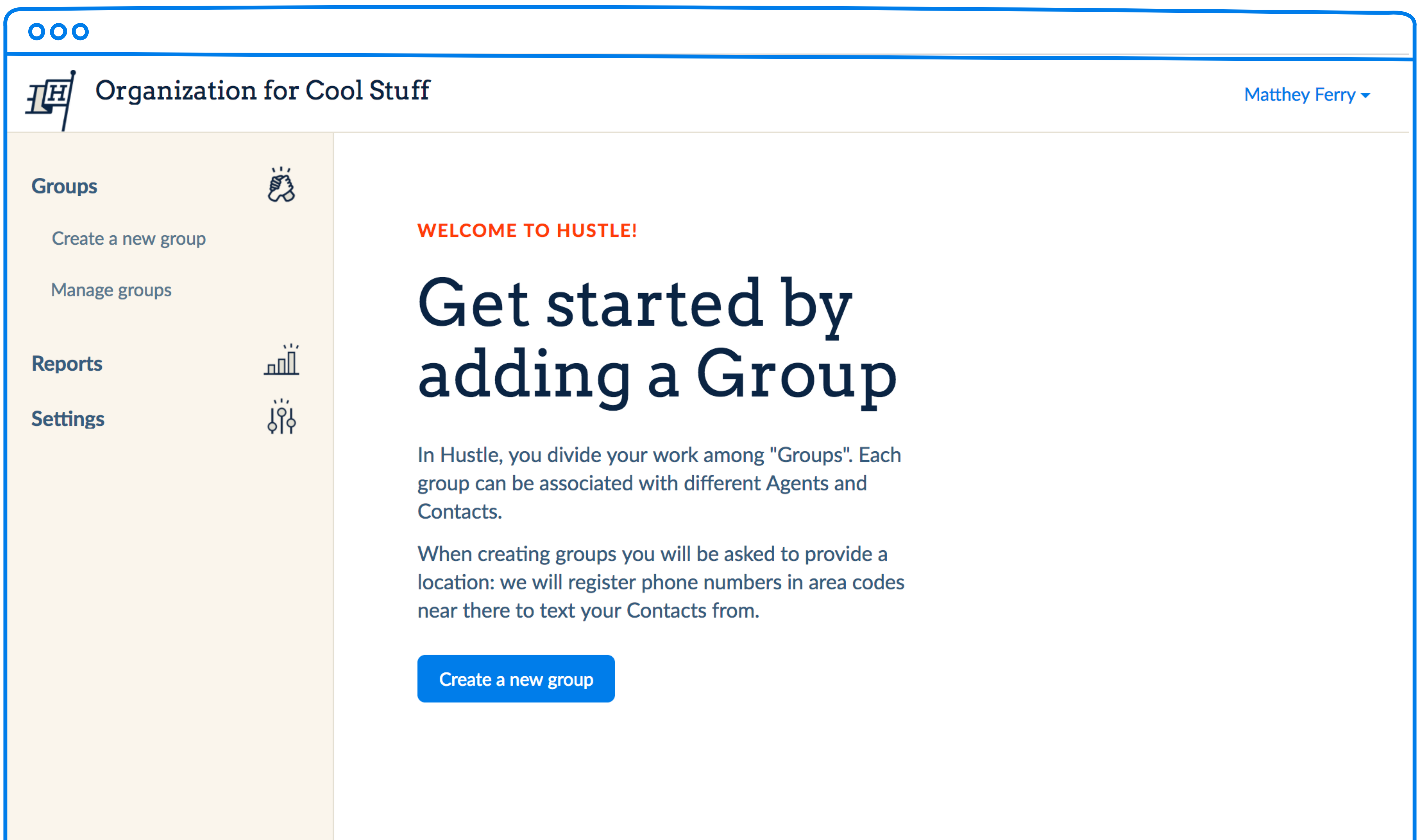
Log in

You must have a Hustle user account in order to be made an organization admin. Ask your Hustle point person or organization admin to give you admin access.

WHAT TO DO

- Go to admin.hustle.life
- Use your Hustle username and password to log in

Welcome to your organization's admin panel!



STEP 2

Add a group

Groups

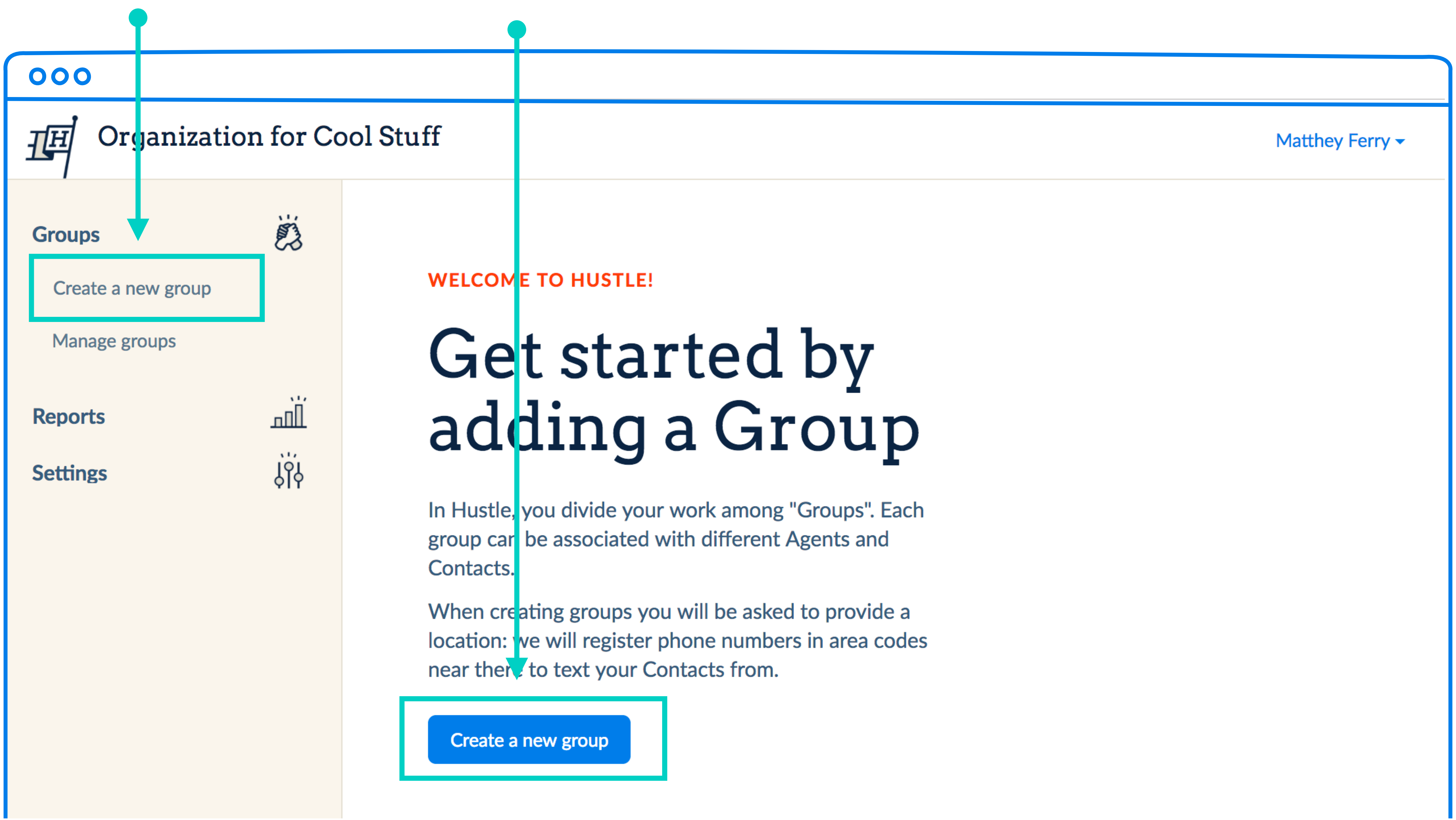
Groups are where you manage goals, agents, and contacts. Think about groups as communities of people your agents are reaching to.

WHAT TO DO

- In the left sidebar navigation, click “Create group”
- Enter a name and specify a location
- Click “Save”

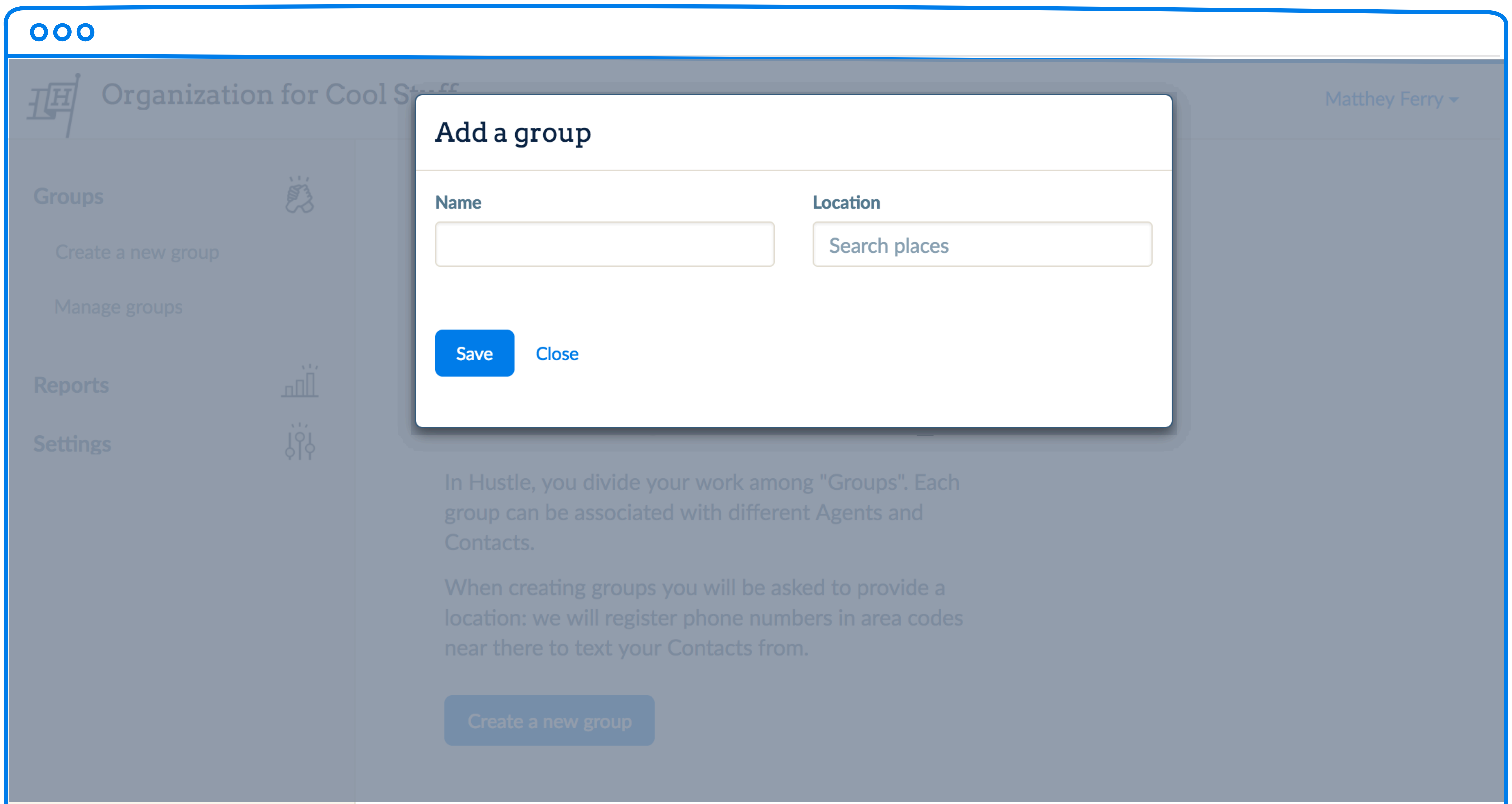
Create your first group!

When you first log in to Hustle, you will be greeted with a welcome message. At the bottom is a button to create your first group. In the future, you can create new groups by clicking the link in the sidebar.



Give it a name and a location

The location is used to determine the area codes for phone numbers that your agents will be texting from via Hustle.



STEP 4

Add agents to a group

Agents

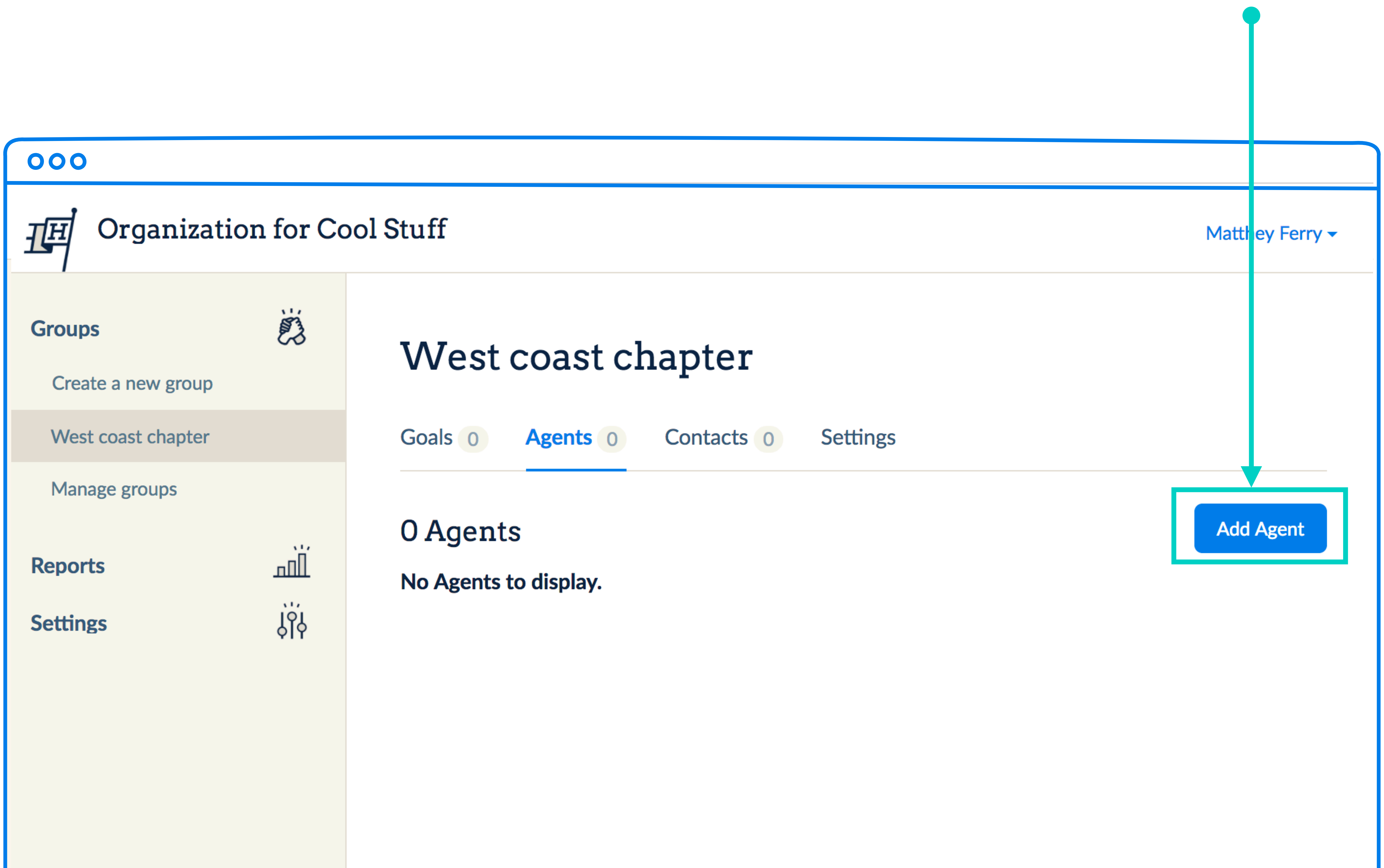
Agents use the web or mobile app to send messages. You can view agents in each group by clicking on the agents tab.

WHAT TO DO

- In the sidebar navigation, click on the group you'd like to add agents to
- Click on the "agents" tab
- Click the "add agents" button to add agent name, phone number and email
- Send agents an activation code

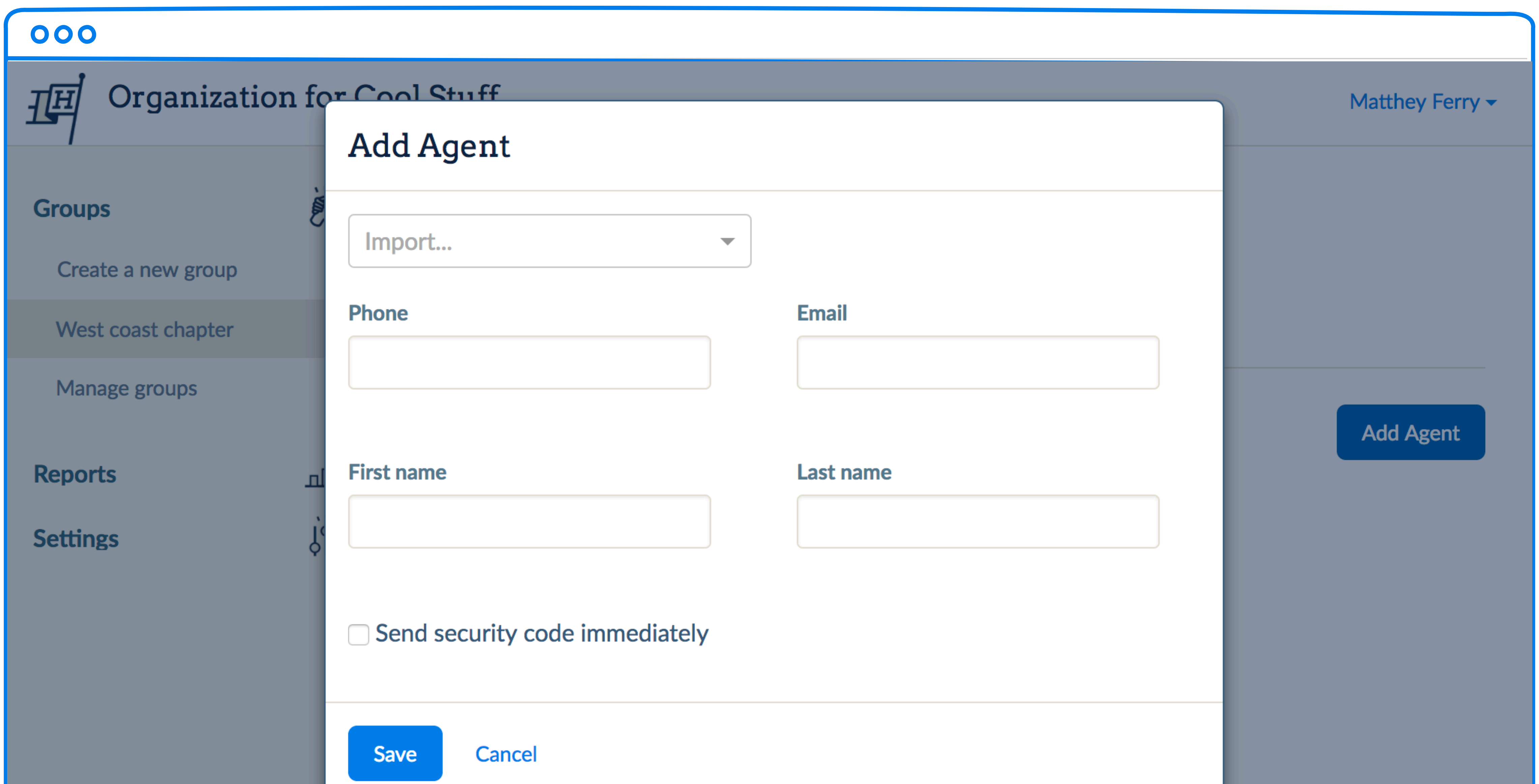
Add an agent

Navigate to a group, then to the “Agents" tab. Click the button on the right to add an agent.



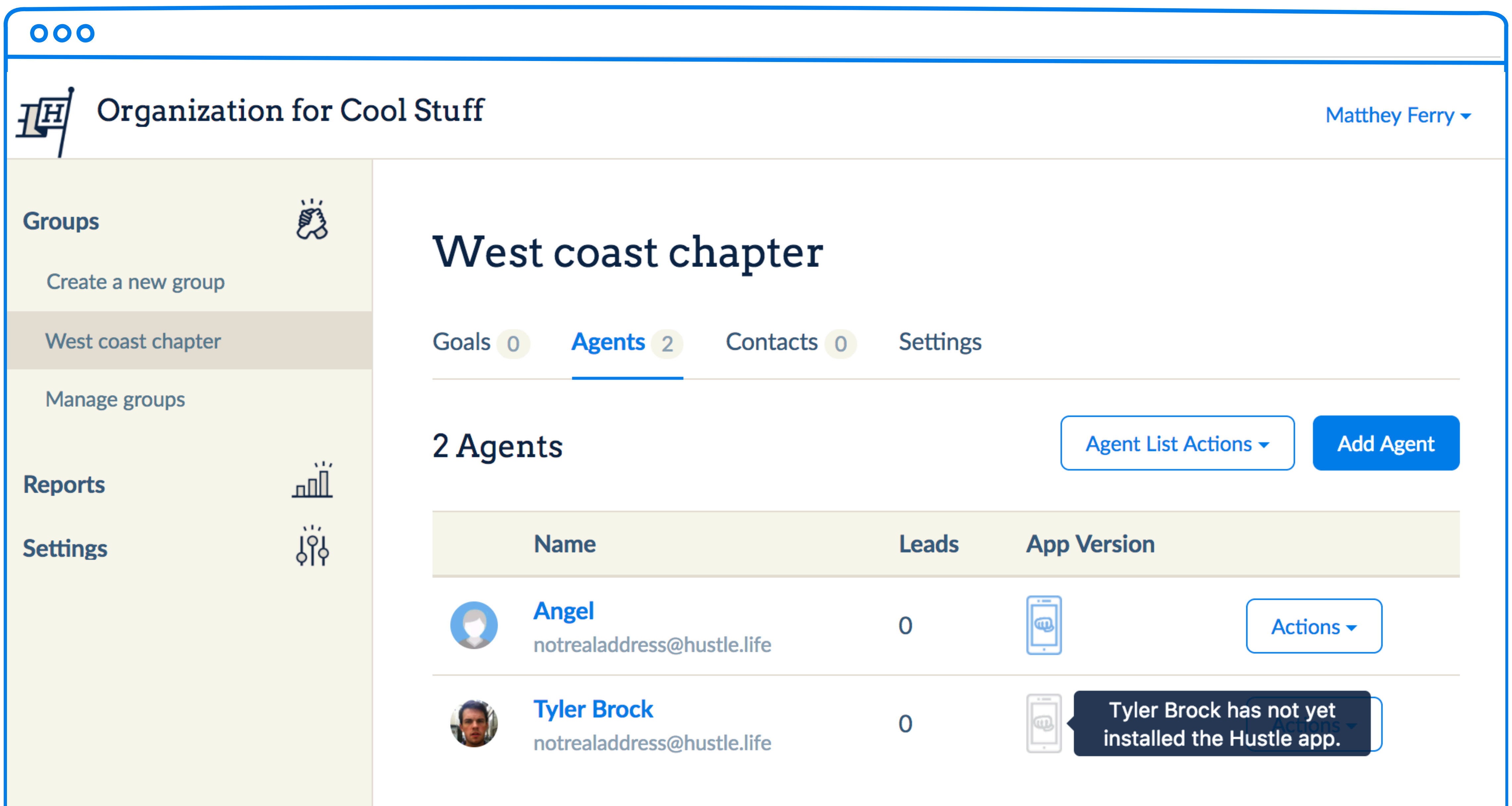
Fill out the agent’s information

If the agent is new to your organization, fill out the form and click “send security code”. The new agent will receive an SMS with a link to enter their security code and create their user account. If you’ve added this agent in another group, click on the “import” dropdown to import this agent.



Confirm your agents have installed the apps

A blue icon means the organizer has installed app successfully. A gray icon means the agent has not installed the app yet.



STEP 3

Add contacts to a group

Contacts

Contacts are the list your agents are sending messages to.

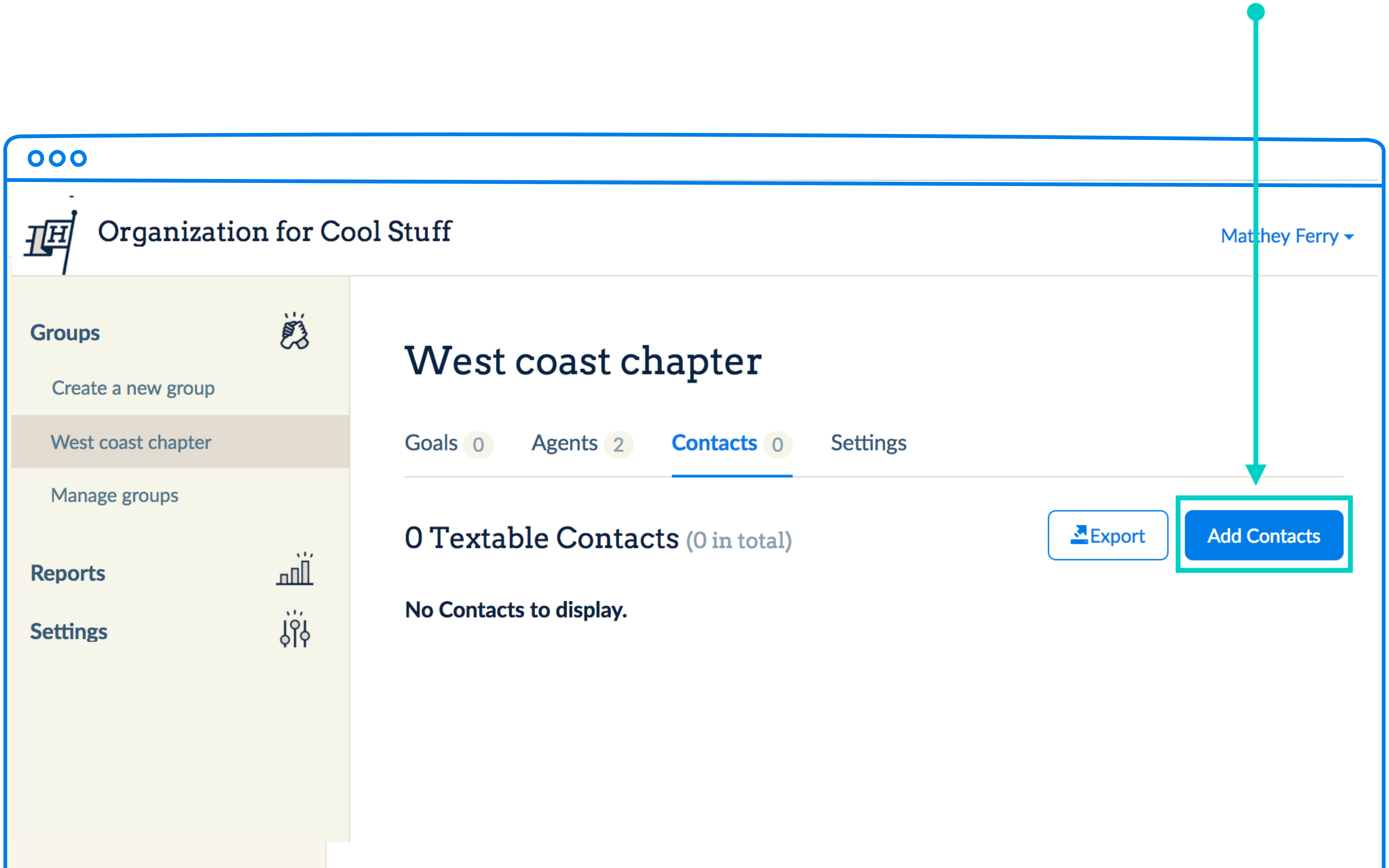
You can have a maximum of 10,000 contacts per group.

WHAT TO DO

- In the sidebar navigation, click on the group you'd like to add agents to
- Click on the "contacts" tab
- Click the "add contacts" button
- Choose to add one contact or upload a CSV

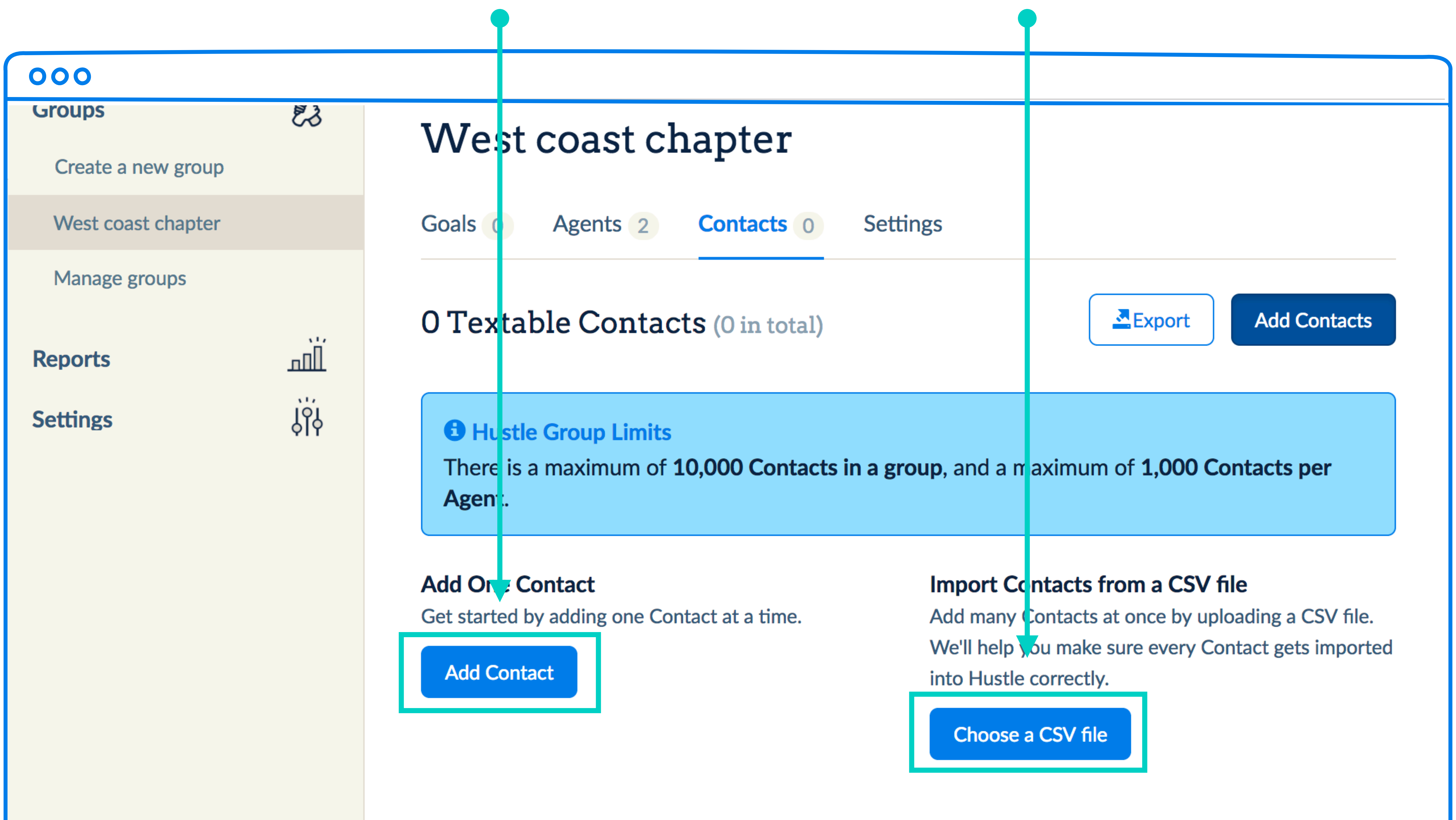
Add contacts

Navigate to a group, then to the “Contacts" tab. Click the button on the right to add contacts.



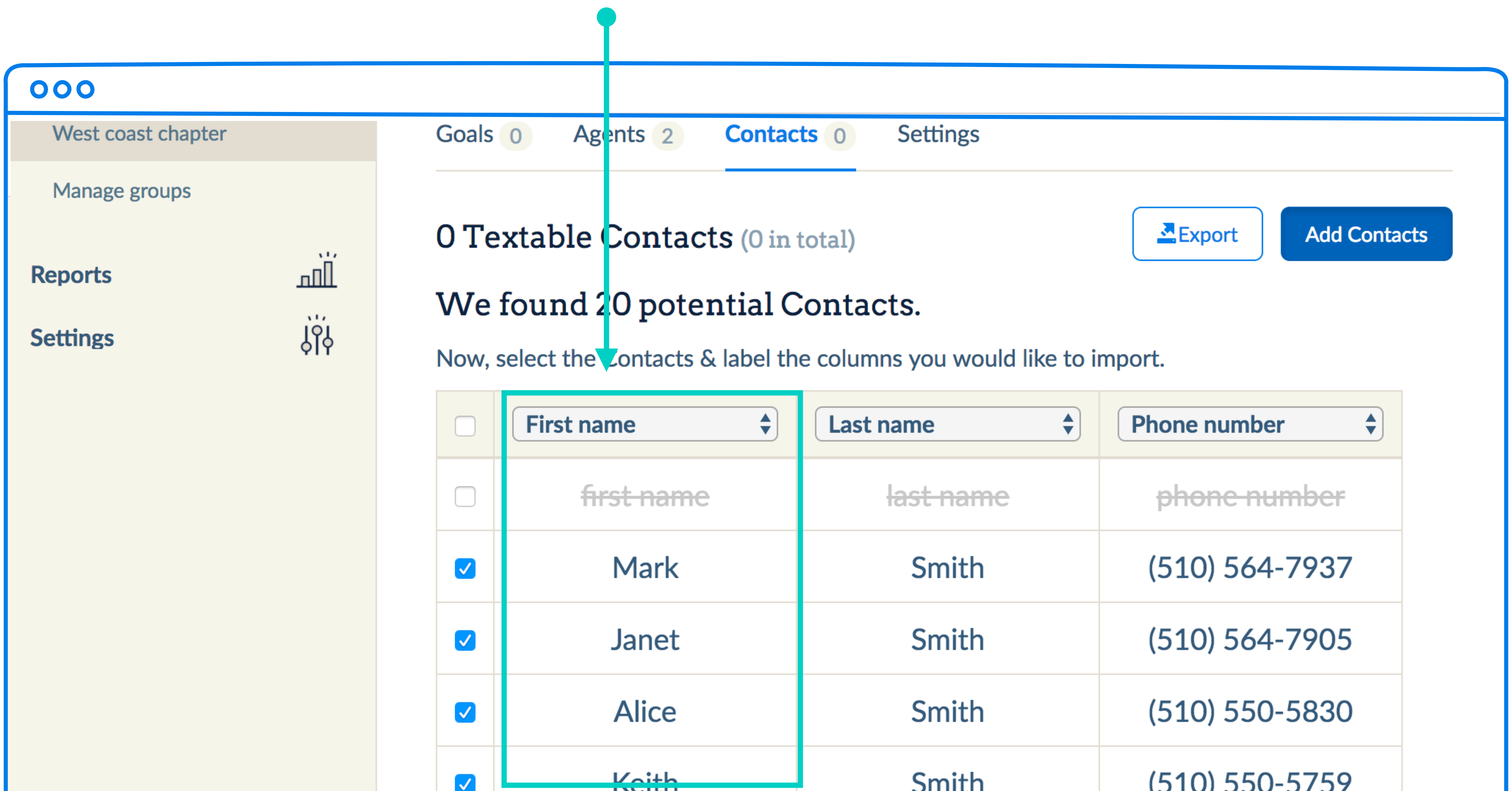
Choose to upload a CSV or add individually

There is a limit of 10,000 contacts per group. Files must be a **.csv**, and must have a minimum of “First name”, “Last name”, and “Phone number.”



When uploading, ensure the columns and headers match

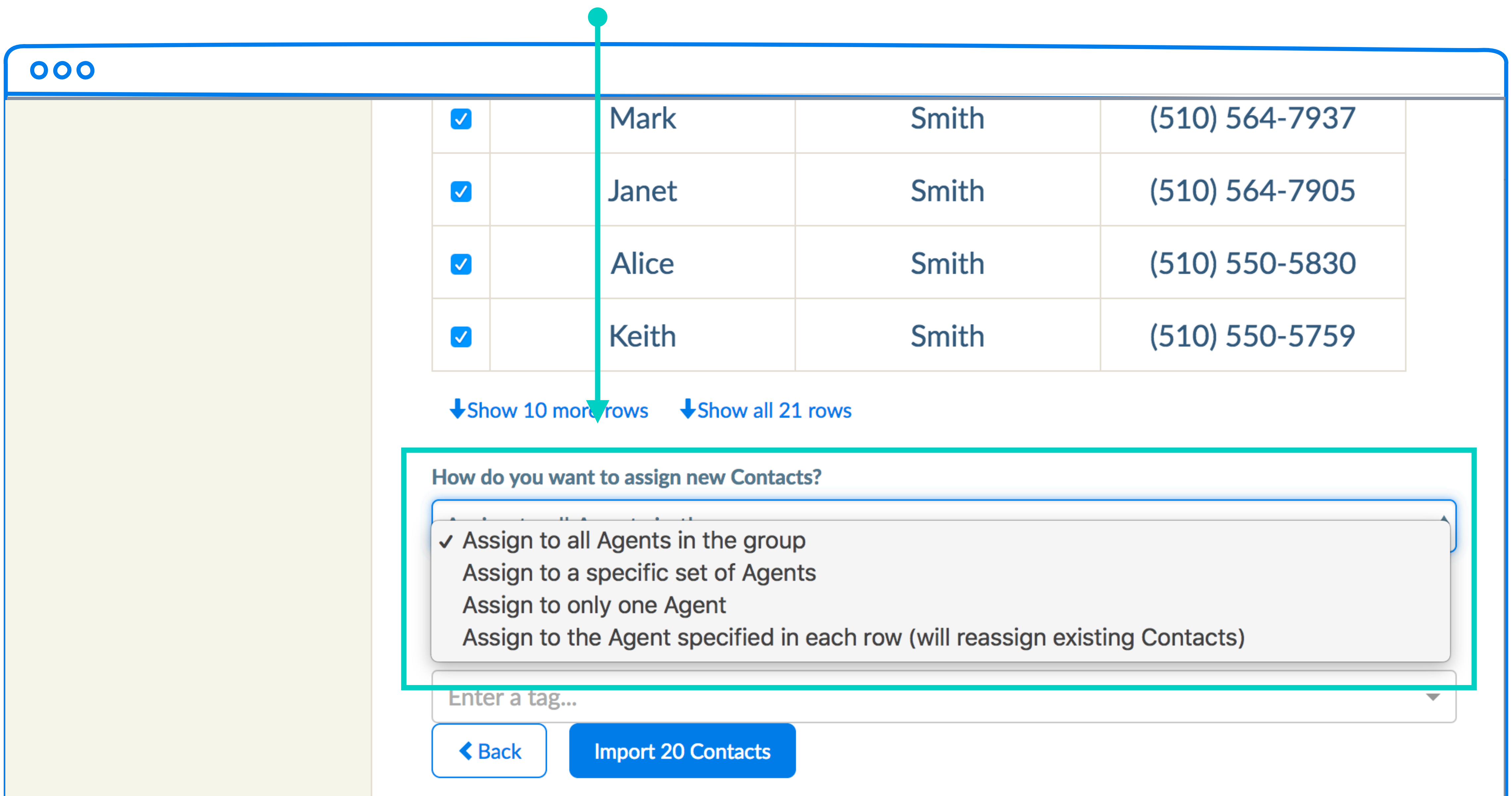
When you choose a CSV file, ensure that the column headers match the content of the column, e.g. the dropdown "First name" should correspond to the content of that column.



OPTIONAL

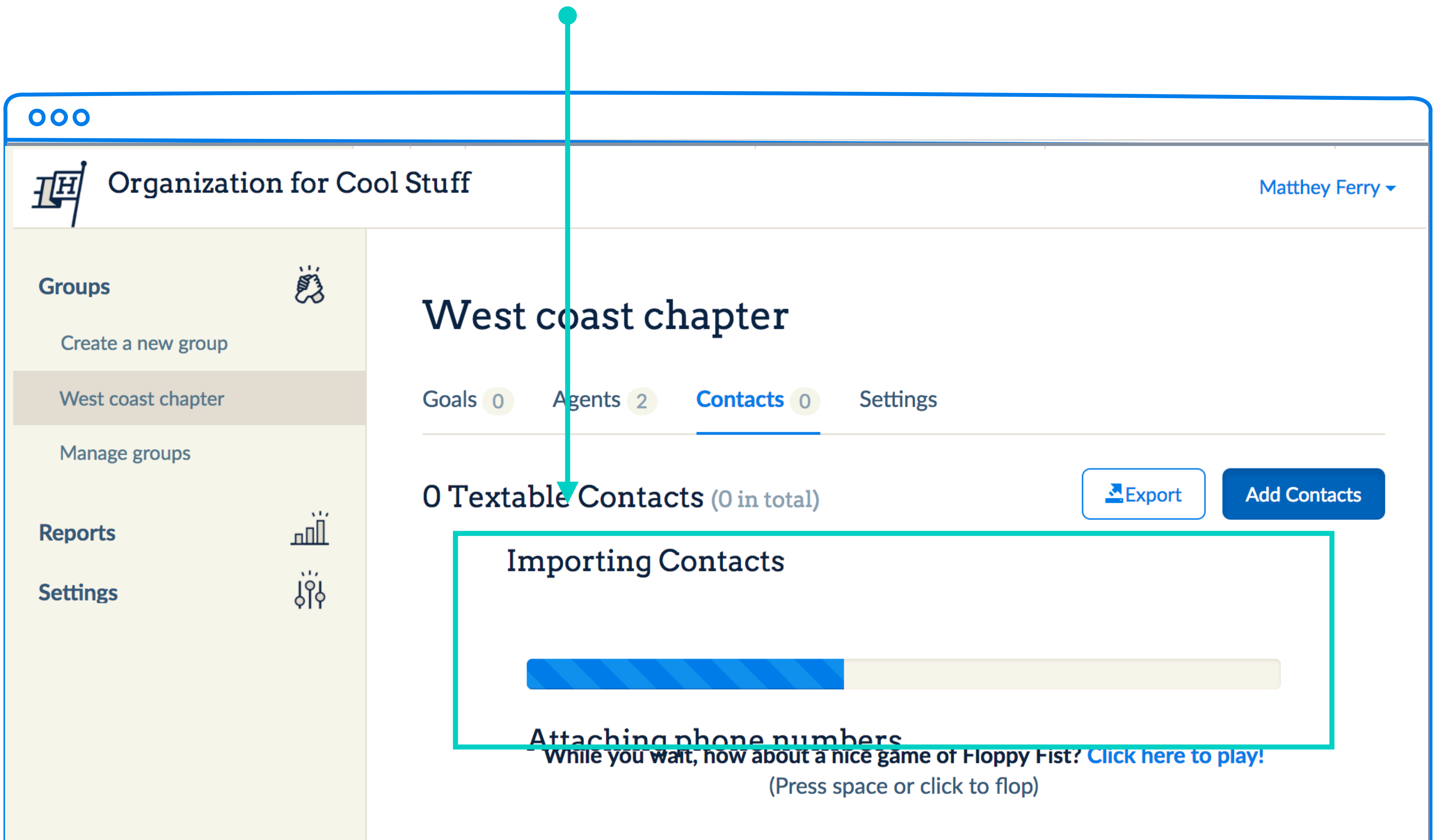
Assign the contacts to your agents

In order to create goals that only allow agents to message contacts they are assigned to, you must add agents first, then **assign the contacts to agents**. You can choose from a set of options on how to assign the contacts, including using a column in the CSV.



Finish the import

Click the “import contacts” button to kick off the upload process. This may take a few minutes, depending on how large the file is.



STEP 5

Create a goal and start Hustlin'!

Goals

Goals create the workflows that your agents will use to send messages to contacts. You can choose from a number of different goal "types:"

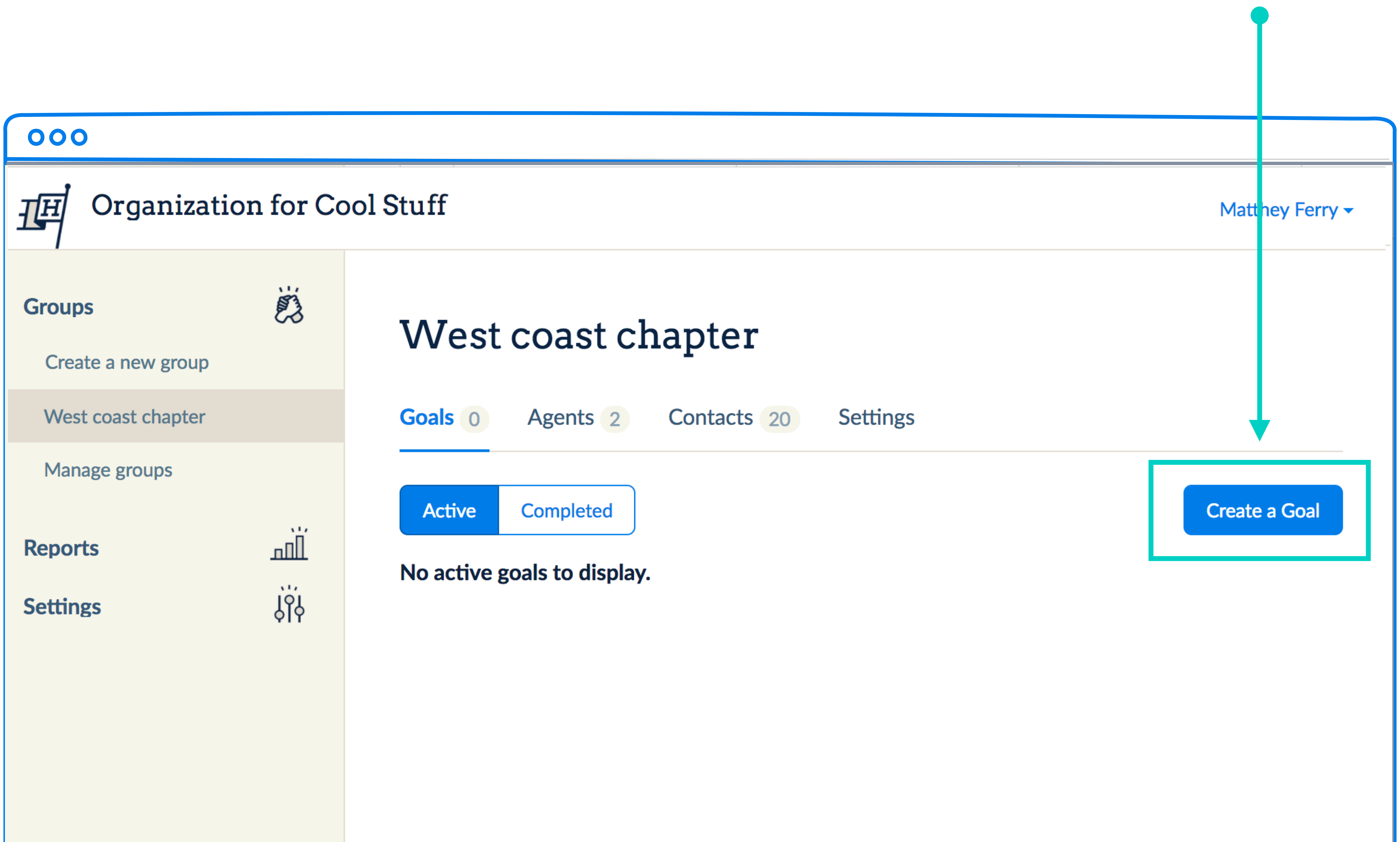
- Event attendance
- Volunteer staffing
- Raise money
- Legislative contact
- Re-engagement

WHAT TO DO

- In the sidebar navigation, click on the group you want to create a goal for
- Click on the "Goals" tab
- Click the "Create a goal" button
- Choose a goal "type"
- Follow the instructions to fill out the form

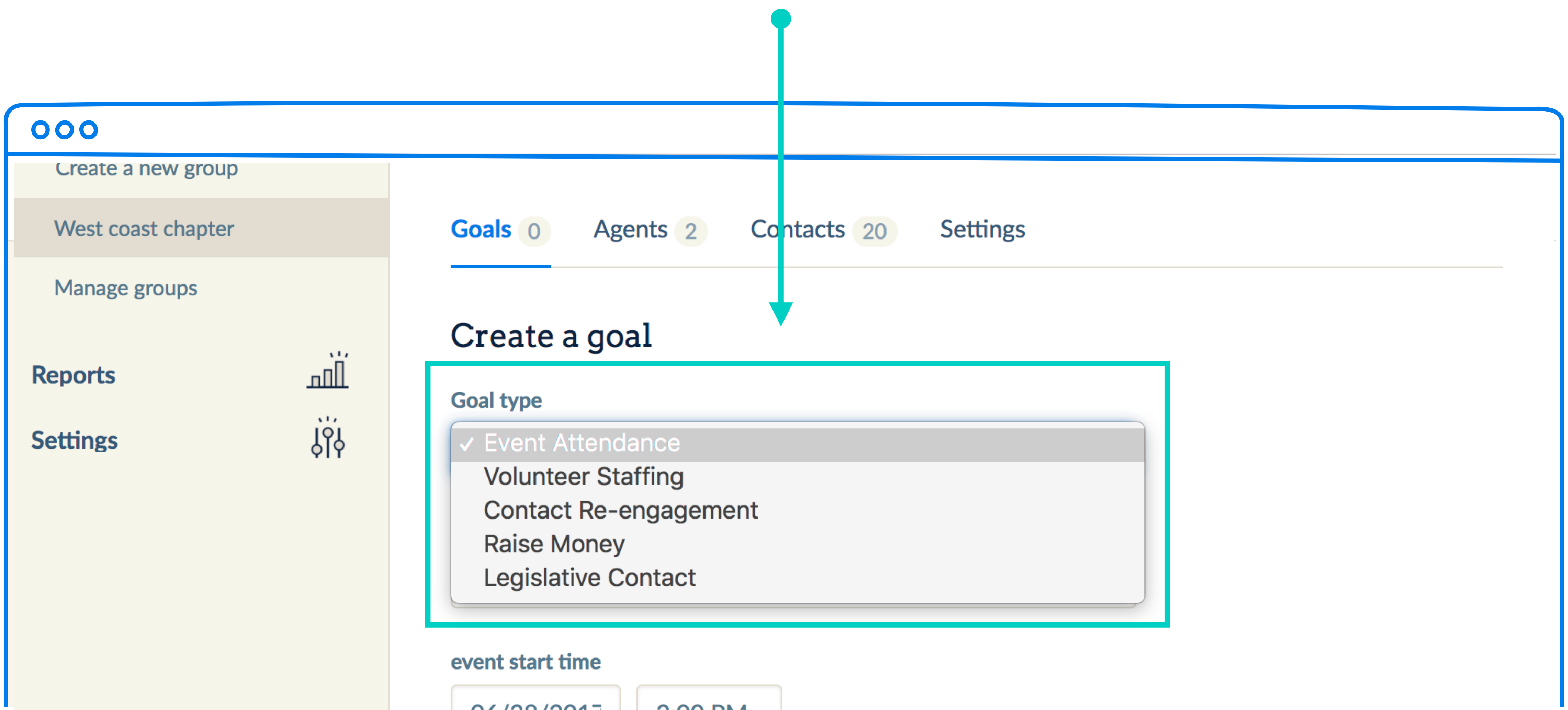
Add a goal

Navigate to the “goal” tab, and click “create new goal”.



Select a goal type

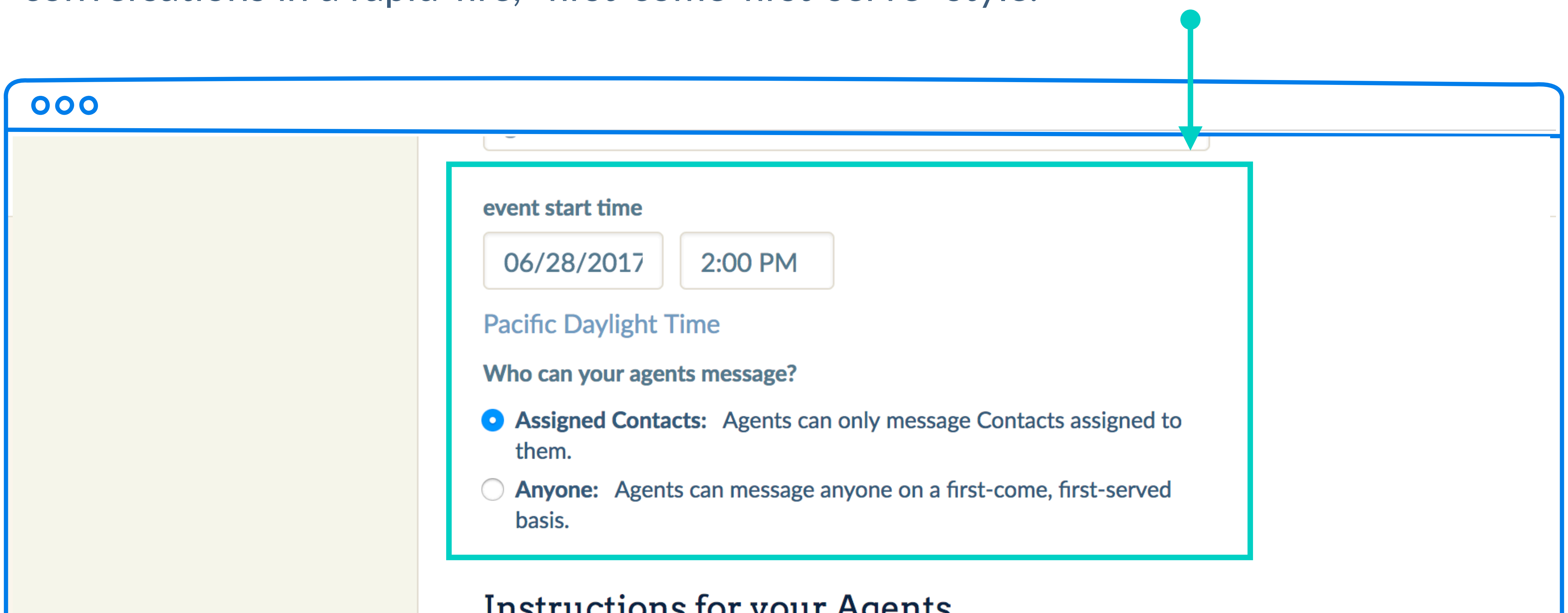
Choose a goal type from the dropdown depending on what you want to ask your contacts to do. Event Attendance, Volunteer Recruitment, and Legislative Contact have two steps: Invitation and Reminders . Raise Money and Re-engage only have one step. All goal types allow agents to track yes/no replies from contacts.



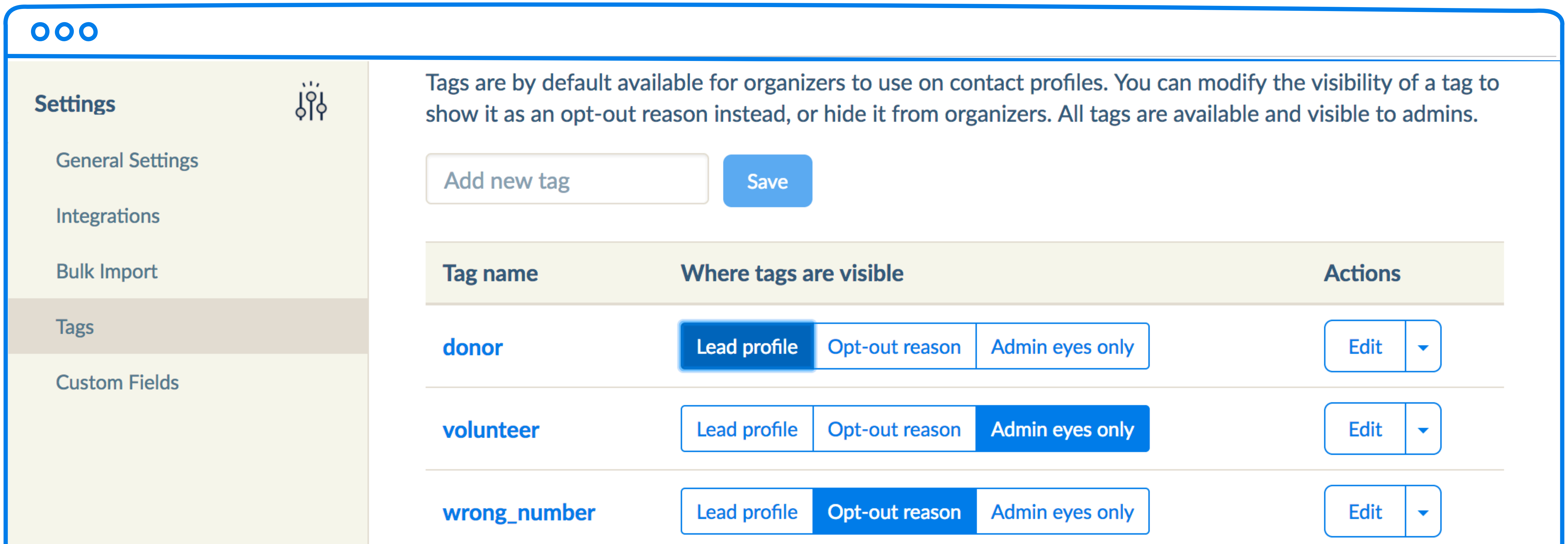
Create a name, a deadline for the goal, and the messaging strategy.

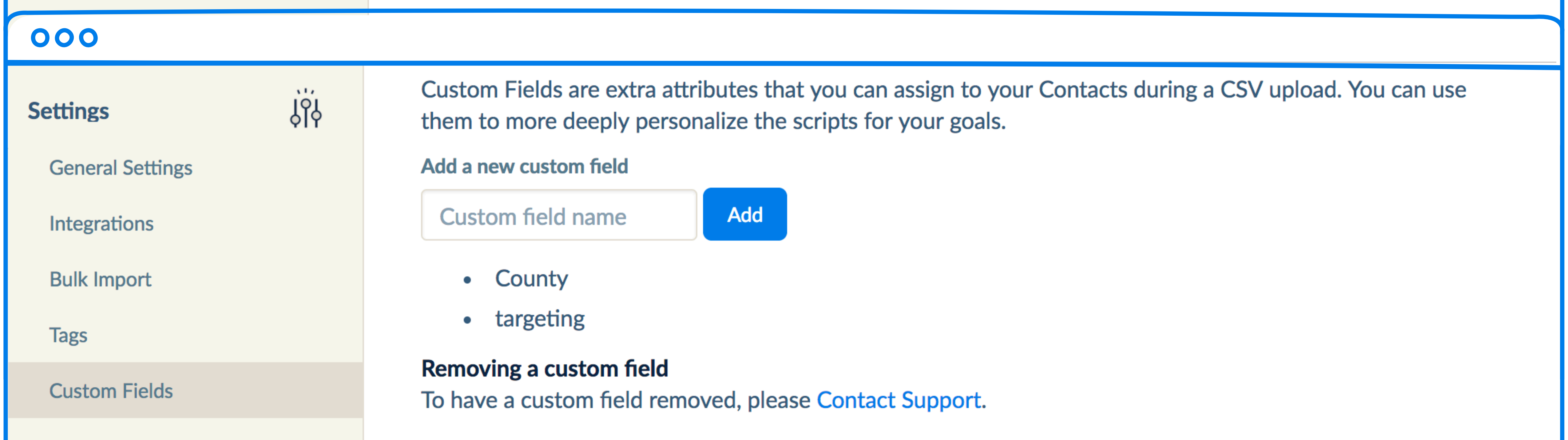
The time corresponds to when the goal will end. For event goals, you should choose the event's starting day/time. For fundraising, you'd select a date you want the drive to end.

The messaging strategy determines if your agents can hustle only contacts they are assigned to, or if you prefer, allow agents to pull from a queue and start conversations in a rapid-fire, "first-come-first-serve" style.



Adding tags and custom fields





Target specific contacts

By default, the goal will target all of the group's contacts. You can optionally use custom fields or tags in order to target specific sets of your contacts. To create tags and custom fields go to "Settings" in the sidebar navigation, then click "Tags" or "Custom Fields."

CUSTOM FIELDS

Create the custom field name
In the section for Custom fields, add a unique name for the custom field.

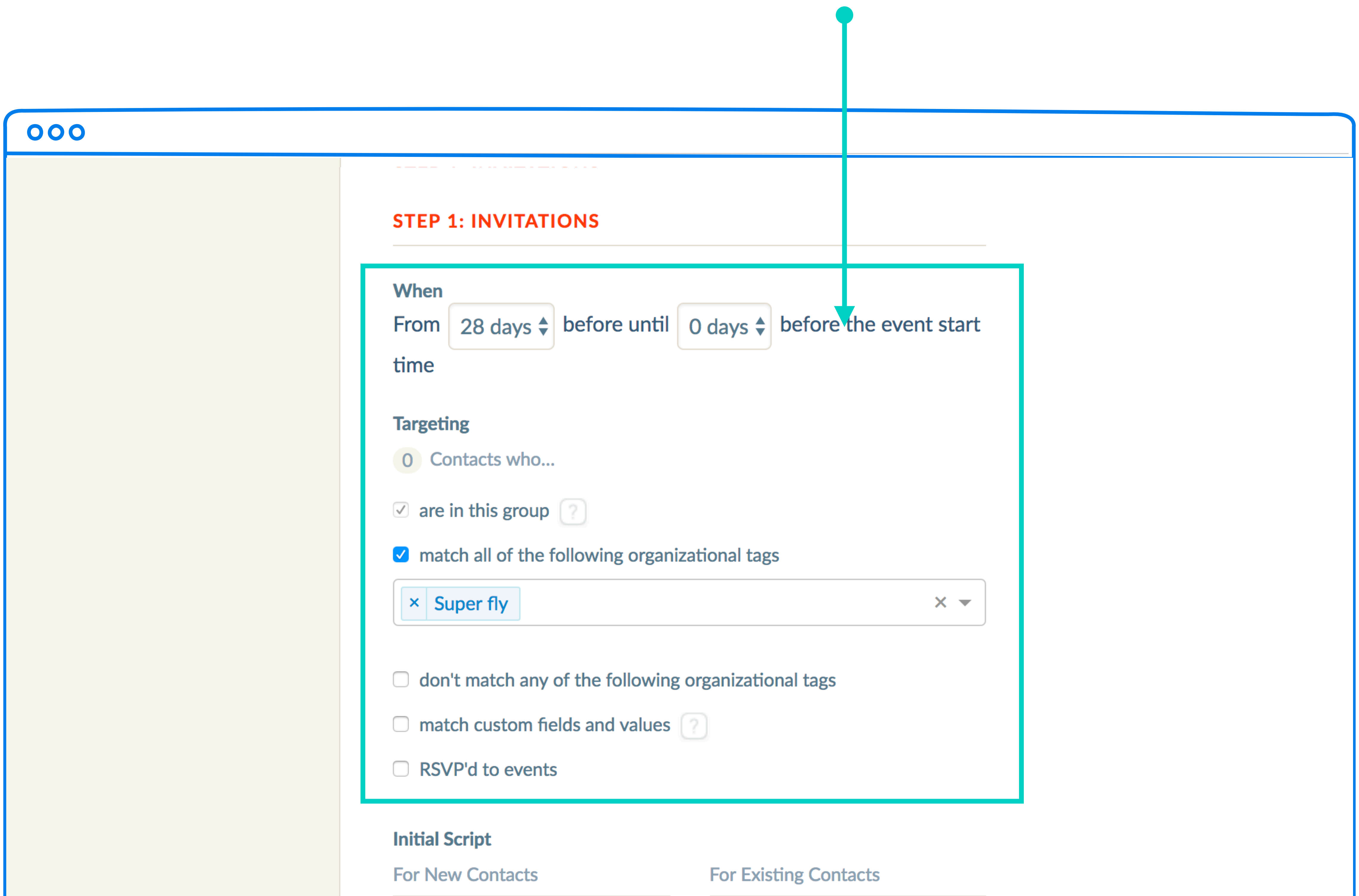
Ensure contacts have the field
Upload a CSV with a column for the custom field, using the field name in the header row, with values for the field each contact row.

TAGS

Create tags
In the tag section, add unique tag names, and adjust level of visibility for each tag.

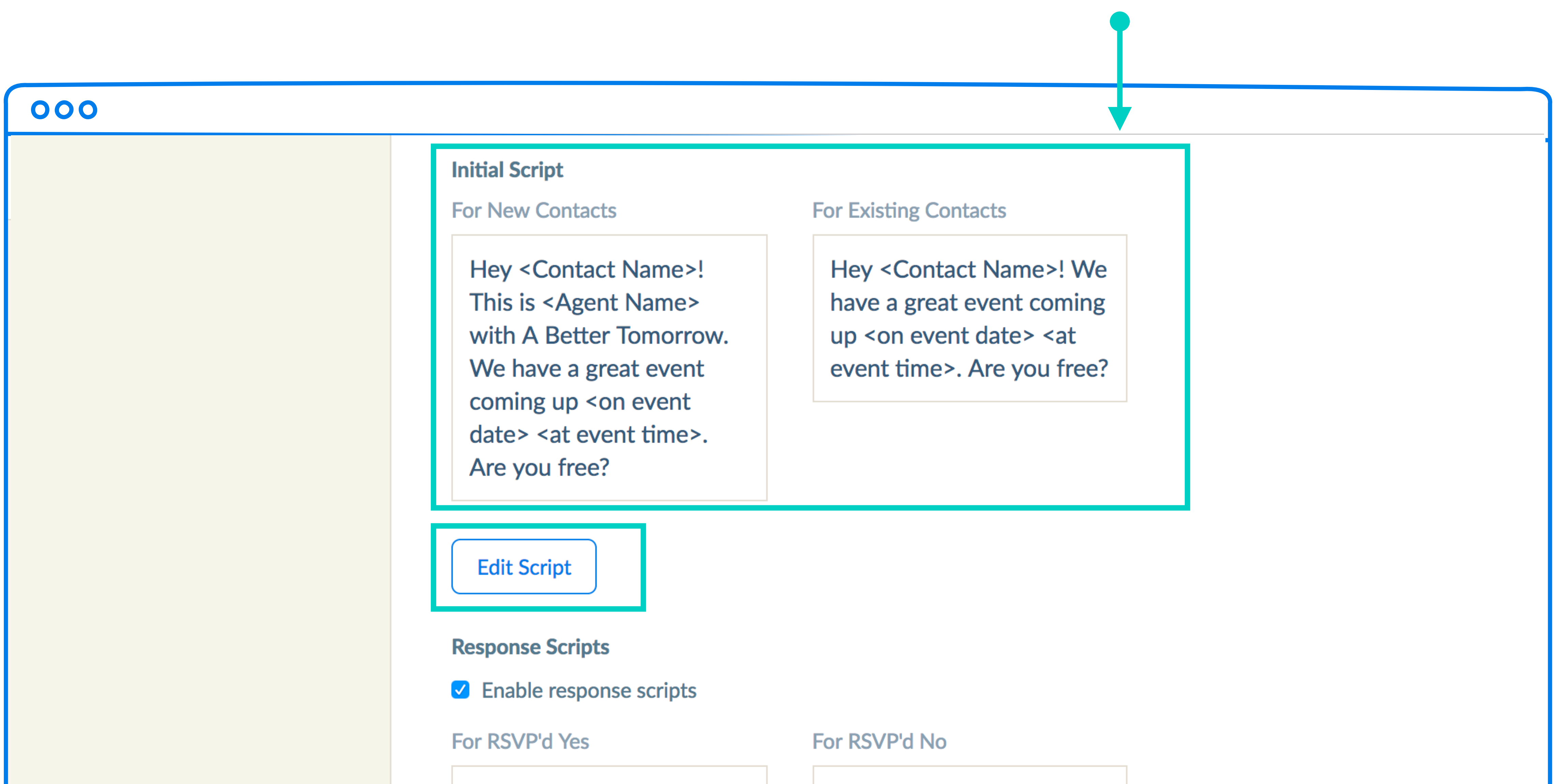
Ensure contacts have the tag
Upload a CSV for the contacts you want to tag. Choose the tags you want to apply on the upload screen.

Use the tags and custom fields to target contacts in goal creation



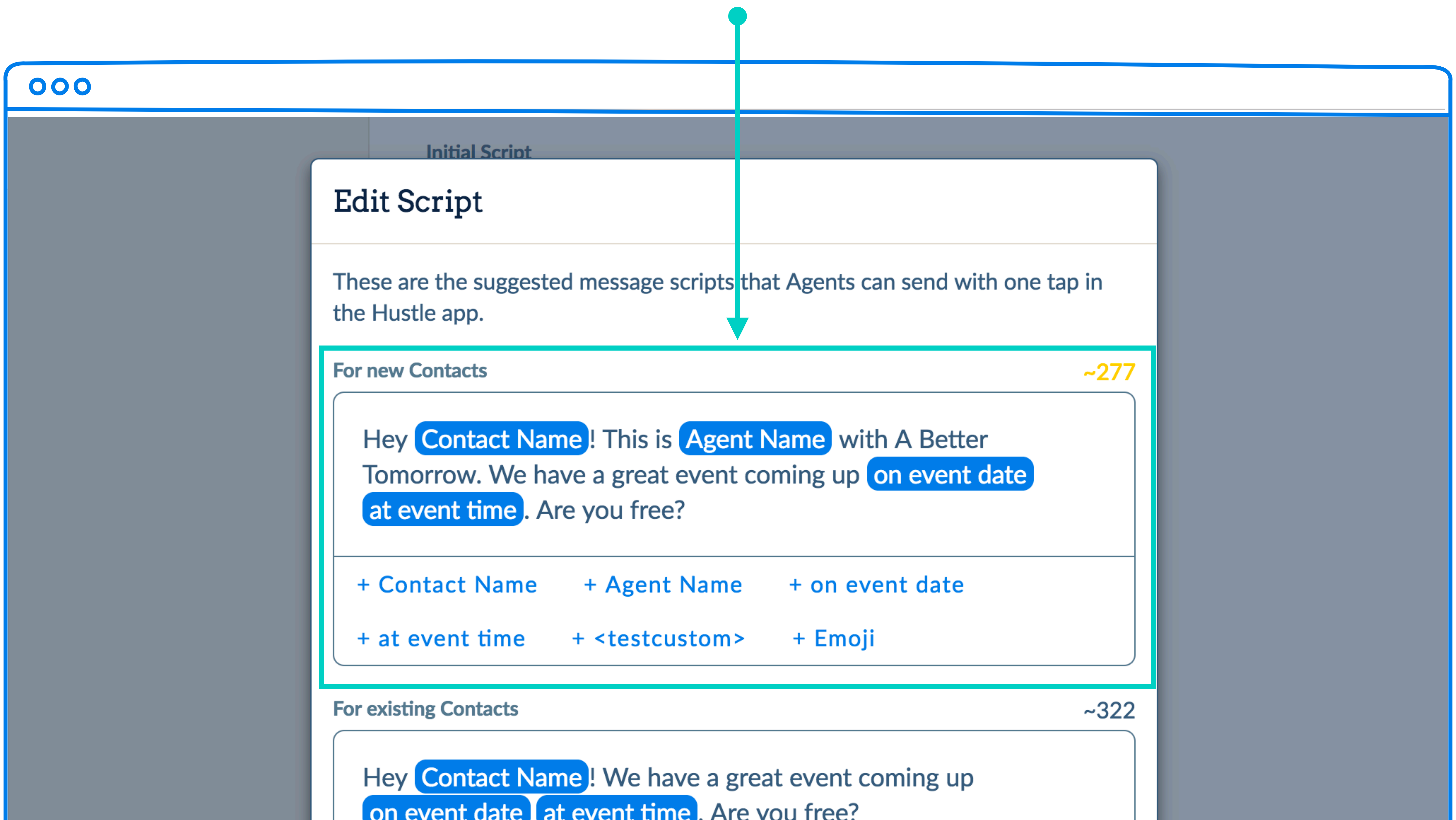
Texts should read like texts from people, not robots.

Each agent's workflow has your scripts pre-populated and personalized. Scripts allow you to guide your agents on what to say. You can edit the scripts to suit the specifics of your goal and manner of speaking.



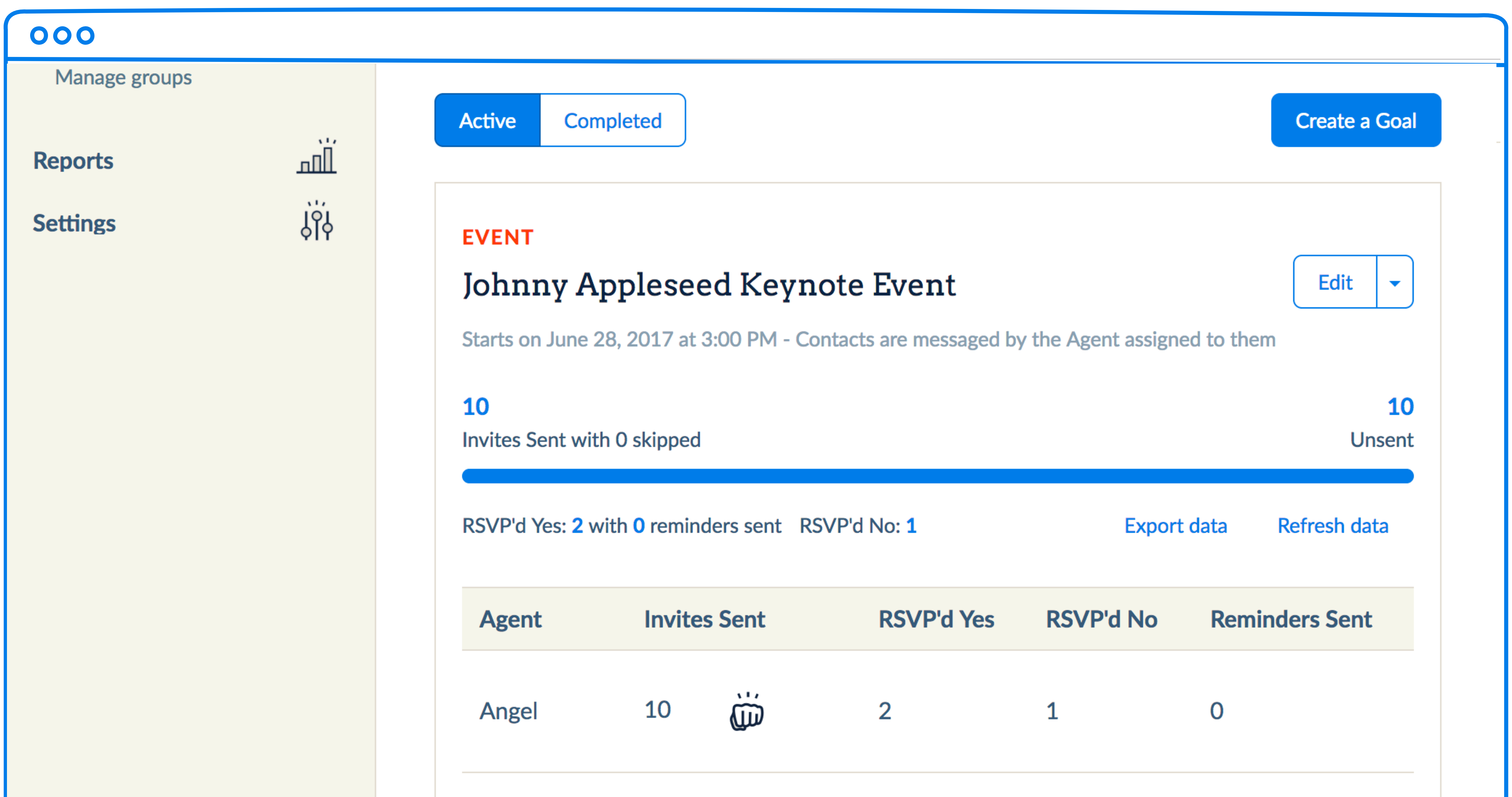
You can use variables in scripts

Scripts can make use of special variables (the blue bubbles). There are preset variables that are customized in each message sent. You can also use your custom fields as variables for things like donation amount or legislator phone number.



Launch your new goal!

Once you've finished creating the scripts, targeting filters, and filled out the correct ending time, go ahead and click "Create goal." You'll now see it in the "active" goals tab.



STEP 6

Check out the guides for hustling with the web and native apps