

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!


The screenshot shows a web interface for an organization named "Organization for Cool Stuff". The user is identified as "Matthey Ferry". The left sidebar contains navigation options: "Groups" (with a group icon), "Reports" (with a bar chart icon), and "Settings" (with a gear icon). Under "Groups", there are links for "Create a new group" and "Manage groups". The main content area features a "WELCOME TO HUSTLE!" message, followed by the heading "Get started by adding a Group". Below this, there is explanatory text about how groups are used in Hustle and a blue button labeled "Create a new group".


Organization for Cool Stuff Matthey Ferry ▾

Groups 

Create a new group

Manage groups

Reports 

Settings 

WELCOME TO HUSTLE!

Get started by adding a Group

In Hustle, you divide your work among "Groups". Each group can be associated with different Agents and Contacts.

When creating groups you will be asked to provide a location: we will register phone numbers in area codes near there to text your Contacts from.

[Create a new group](#)

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”

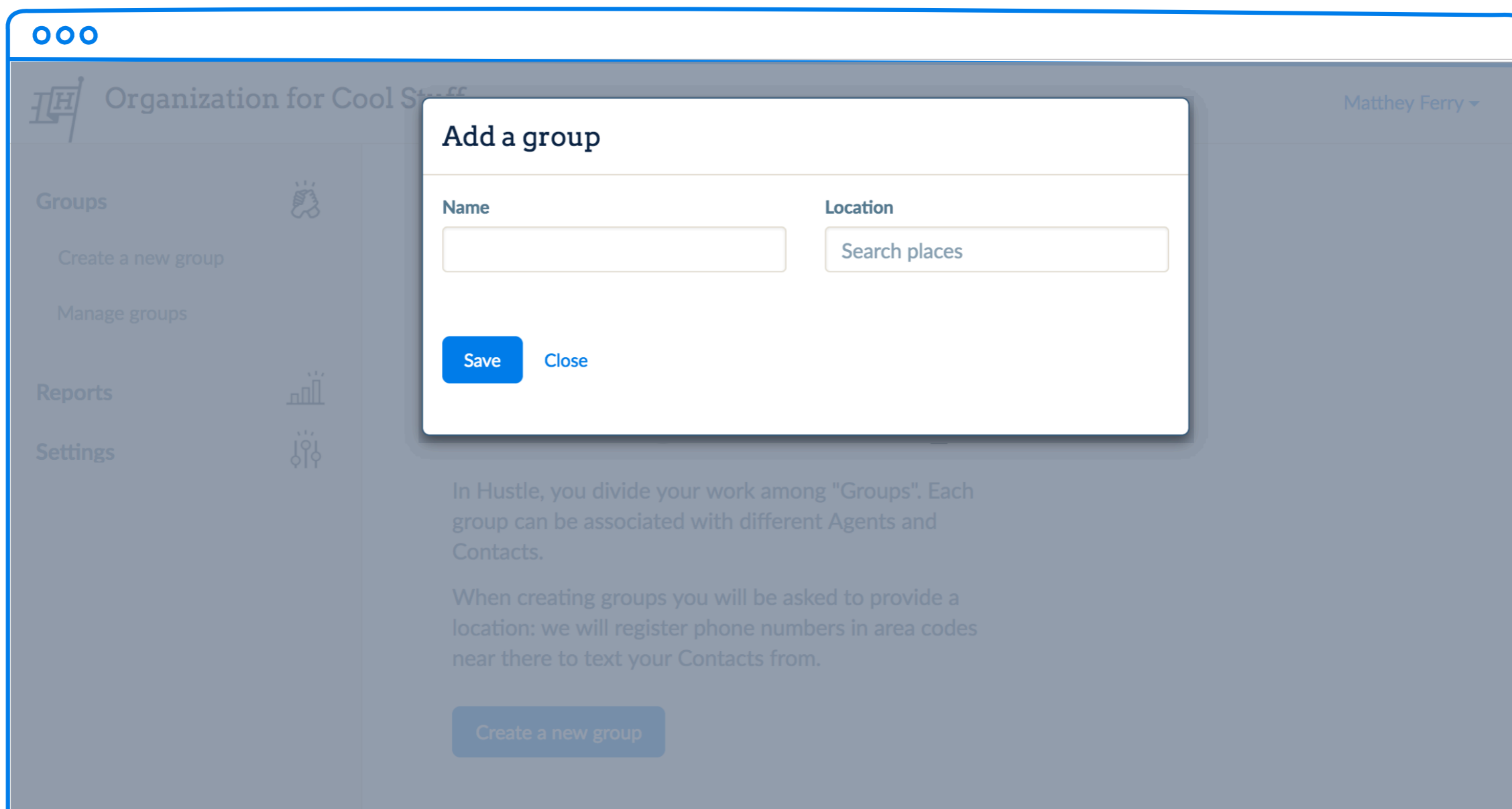
Create your first group!

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.

The screenshot displays the Hustle dashboard interface. At the top left, there are three blue circles representing a menu. Below them is the Hustle logo (a stylized 'H' in a square) and the text 'Organization for Cool Stuff'. On the top right, the user's name 'Matthey Ferry' is shown with a dropdown arrow. The left sidebar is highlighted in a light beige color and contains several menu items: 'Groups' (with a group icon), 'Reports' (with a bar chart icon), and 'Settings' (with a gear icon). The 'Groups' section is expanded, showing two options: 'Create a new group' (highlighted with a red box) and 'Manage groups'. The main content area features a large heading 'Get started by adding a Group' and a sub-heading 'WELCOME TO HUSTLE!'. Below the heading, there is a paragraph of text explaining that groups are used to divide work among agents and contacts, and that phone numbers are registered with area codes near their location. At the bottom of the main content area, there is a blue button labeled 'Create a new group' (highlighted with a red box). Two red arrows point from the top of the page to the 'Create a new group' link in the sidebar and the 'Create a new group' button in the main content area.

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.



The screenshot shows a web application interface for Hustle. At the top left, there are three blue circles. Below them is the Hustle logo and the text "Organization for Cool Stuff". On the right, the user's name "Matthey Ferry" is displayed with a dropdown arrow. A sidebar on the left contains navigation options: "Groups" (with a group icon), "Reports" (with a bar chart icon), and "Settings" (with a gear icon). Under "Groups", there are links for "Create a new group" and "Manage groups". A modal dialog box titled "Add a group" is centered on the screen. It has two input fields: "Name" and "Location". The "Location" field has a placeholder text "Search places". At the bottom of the dialog are two buttons: "Save" (in blue) and "Close". Below the dialog, there is explanatory text: "In Hustle, you divide your work among 'Groups'. Each group can be associated with different Agents and Contacts." and "When creating groups you will be asked to provide a location: we will register phone numbers in area codes near there to text your Contacts from." At the bottom of the page, there is a button labeled "Create a new group".

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

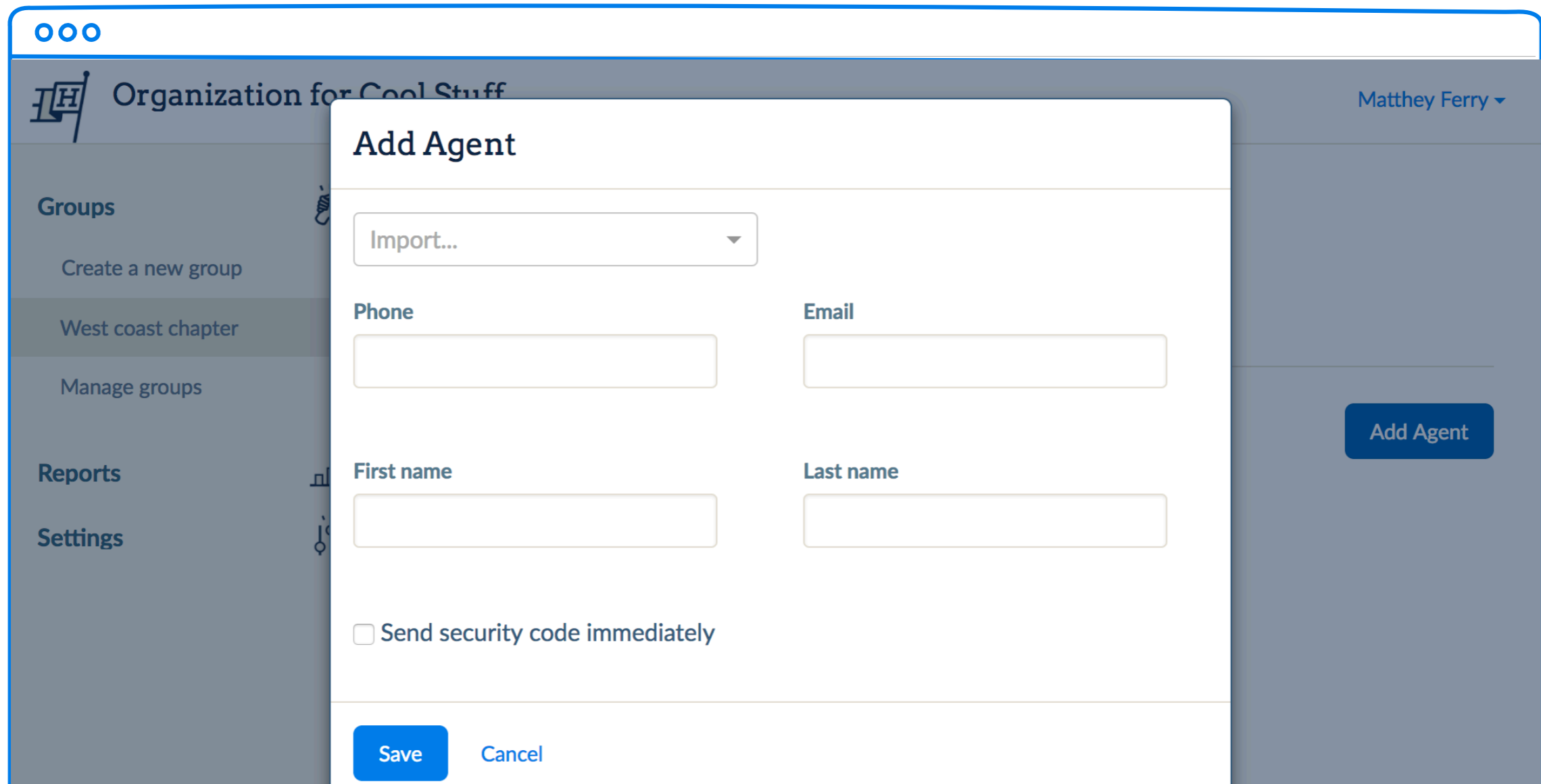
Add an agent

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

The screenshot shows a web application interface for an organization named "Organization for Cool Stuff". The user is logged in as "Matthey Ferry". The interface is divided into a left sidebar and a main content area. The sidebar contains navigation options: "Groups" (with a lightbulb icon), "Reports" (with a bar chart icon), and "Settings" (with a gear icon). Under "Groups", there is a link to "Create a new group" and a selected group named "West coast chapter" with a "Manage groups" link below it. The main content area is titled "West coast chapter" and has four tabs: "Goals" (0), "Agents" (0), "Contacts" (0), and "Settings". The "Agents" tab is active, showing "0 Agents" and the message "No Agents to display.". A blue "Add Agent" button is located in the bottom right corner of the main content area, highlighted with a red box. A red arrow points from the top right of the image down to this button.

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.







The screenshot shows a web application interface for managing agents. The main header displays the organization name "Organization for Cool Stuff" and the user name "Matthey Ferry". A sidebar on the left contains navigation options: "Groups", "Reports", and "Settings". Under "Groups", there are links for "Create a new group", "West coast chapter", and "Manage groups". A modal window titled "Add Agent" is open in the center, featuring an "Import..." dropdown menu, input fields for "Phone", "Email", "First name", and "Last name", and a checkbox for "Send security code immediately". At the bottom of the modal are "Save" and "Cancel" buttons. In the background, a blue "Add Agent" button is visible on the right side of the page.

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.

The screenshot shows the Hustle CRM interface for an organization named "Organization for Cool Stuff". The user "Matthey Ferry" is logged in. The main view is for the "West coast chapter" group, which has 2 agents, 0 goals, 0 contacts, and 0 settings. The "Agents" tab is selected. There are two agents listed:

- Angel** (notrealaddress@hustle.life): 0 leads, app version 1.1.1, and a blue app icon indicating successful installation.
- Tyler Brock** (notrealaddress@hustle.life): 0 leads, app version 1.1.1, and a gray app icon indicating the app has not been installed. A tooltip message says: "Tyler Brock has not yet installed the Hustle app."

| Name | Leads | App Version |
|--|-------|--|
|  Angel notrealaddress@hustle.life | 0 |  Actions ▾ |
|  Tyler Brock notrealaddress@hustle.life | 0 |  Tyler Brock has not yet installed the Hustle app. |

STEP 3

Add contacts to a group

Contacts

Contacts are the list your agents are sending messages to.

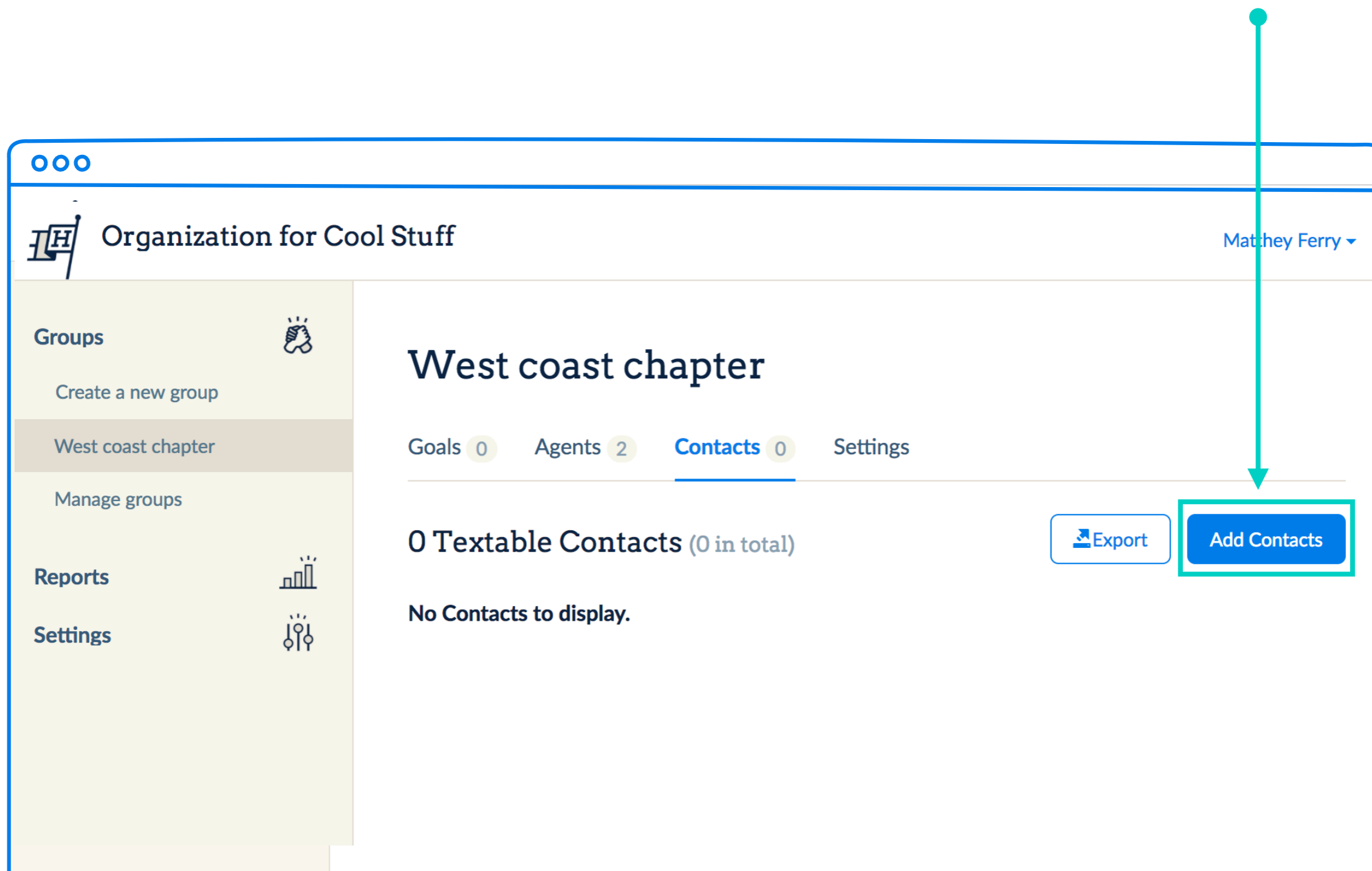
You can have a maximum of 10,000 contacts per group.

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.”

West coast chapter

Goals 0 Agents 2 **Contacts 0** Settings

0 Textable Contacts (0 in total) [Export](#) [Add Contacts](#)

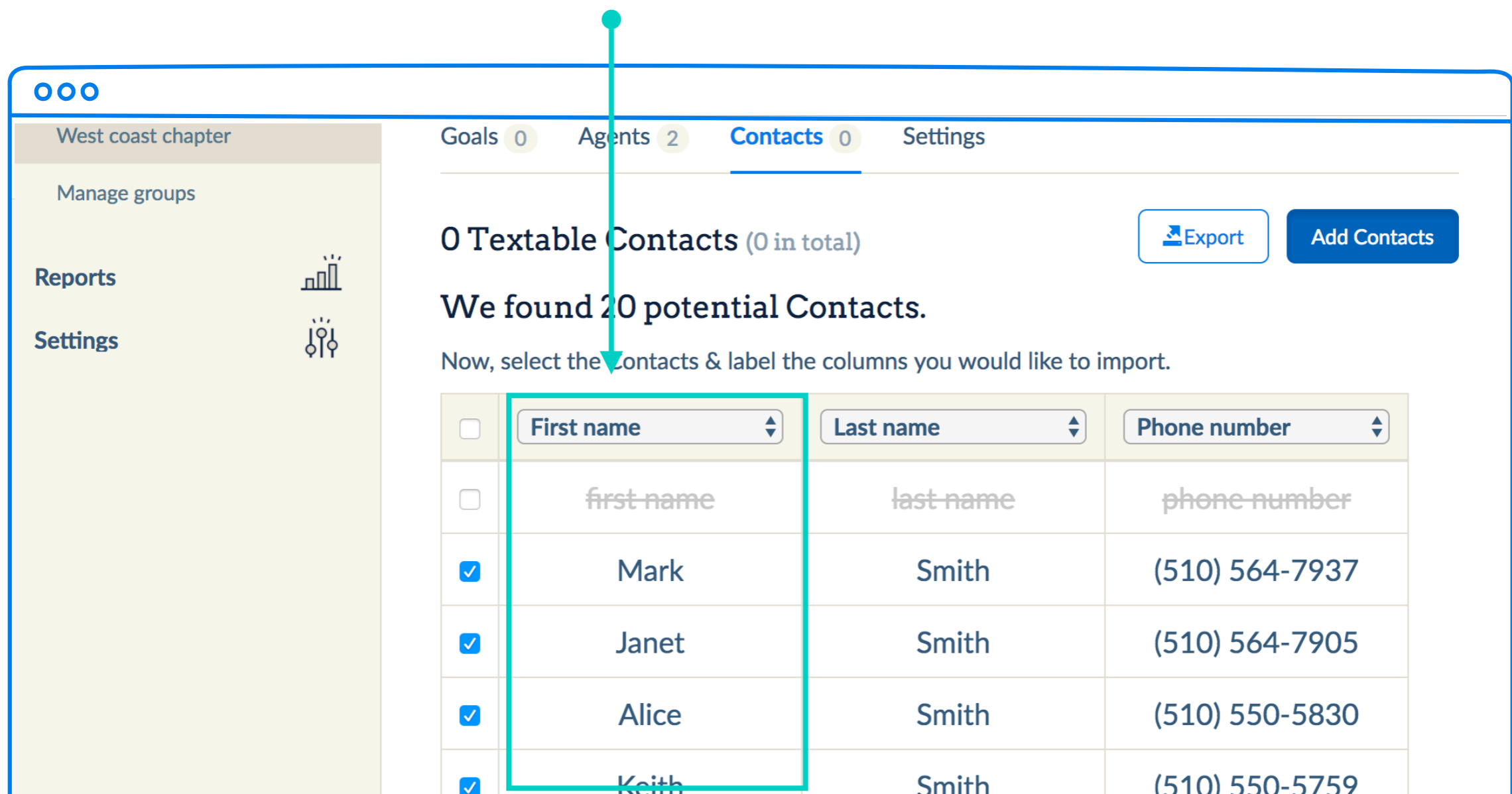
Hustle Group Limits
There is a maximum of **10,000 Contacts in a group**, and a maximum of **1,000 Contacts per Agent**.

Add One Contact
Get started by adding one Contact at a time.
[Add Contact](#)

Import Contacts from a CSV file
Add many Contacts at once by uploading a CSV file. We'll help you make sure every Contact gets imported into Hustle correctly.
[Choose a CSV file](#)

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.




West coast chapter

Goals 0 Agents 2 **Contacts 0** Settings

Manage groups

Reports 

Settings 

0 Textable Contacts (0 in total) [Export](#) [Add Contacts](#)

We found 20 potential Contacts.

Now, select the Contacts & label the columns you would like to import.

| <input type="checkbox"/> | First name | Last name | Phone number |
|-------------------------------------|------------|-----------|----------------|
| <input type="checkbox"/> | first-name | last-name | phone-number |
| <input checked="" type="checkbox"/> | Mark | Smith | (510) 564-7937 |
| <input checked="" type="checkbox"/> | Janet | Smith | (510) 564-7905 |
| <input checked="" type="checkbox"/> | Alice | Smith | (510) 550-5830 |
| <input checked="" type="checkbox"/> | Keith | Smith | (510) 550-5759 |

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.

| | | | |
|-------------------------------------|-------|-------|----------------|
| <input checked="" type="checkbox"/> | Mark | Smith | (510) 564-7937 |
| <input checked="" type="checkbox"/> | Janet | Smith | (510) 564-7905 |
| <input checked="" type="checkbox"/> | Alice | Smith | (510) 550-5830 |
| <input checked="" type="checkbox"/> | Keith | Smith | (510) 550-5759 |

↓ Show 10 more rows ↓ Show all 21 rows

How do you want to assign new Contacts?

- Assign to all Agents in the group
- Assign to a specific set of Agents
- Assign to only one Agent
- Assign to the Agent specified in each row (will reassign existing Contacts)

Enter a tag...

[← Back](#) [Import 20 Contacts](#)

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.

The screenshot shows a web application interface for an organization named "Organization for Cool Stuff". The user is logged in as "Matthey Ferry". The main content area is titled "West coast chapter" and displays statistics for "Goals 0", "Agents 2", and "Contacts 0". A red box highlights the "Importing Contacts" progress bar, which is partially filled with a blue and white striped pattern. Below the progress bar, there is a text overlay that reads "Attaching phone numbers" and "While you wait, how about a nice game of Floppy Fist? Click here to play! (Press space or click to flop)".

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”.

The screenshot shows a web application interface for an organization named "Organization for Cool Stuff". The user is logged in as "Matthey Ferry". The main navigation menu on the left includes "Groups", "Reports", and "Settings". The "Groups" section is expanded, showing "West coast chapter" as the selected group. The main content area displays the "West coast chapter" page, which includes a "Goals" tab (0), "Agents" (2), "Contacts" (20), and "Settings". Below the tabs, there are "Active" and "Completed" filters. The text "No active goals to display." is shown. A blue button labeled "Create a Goal" is highlighted with a red box and a red arrow pointing to it from the top right.

Select a goal type

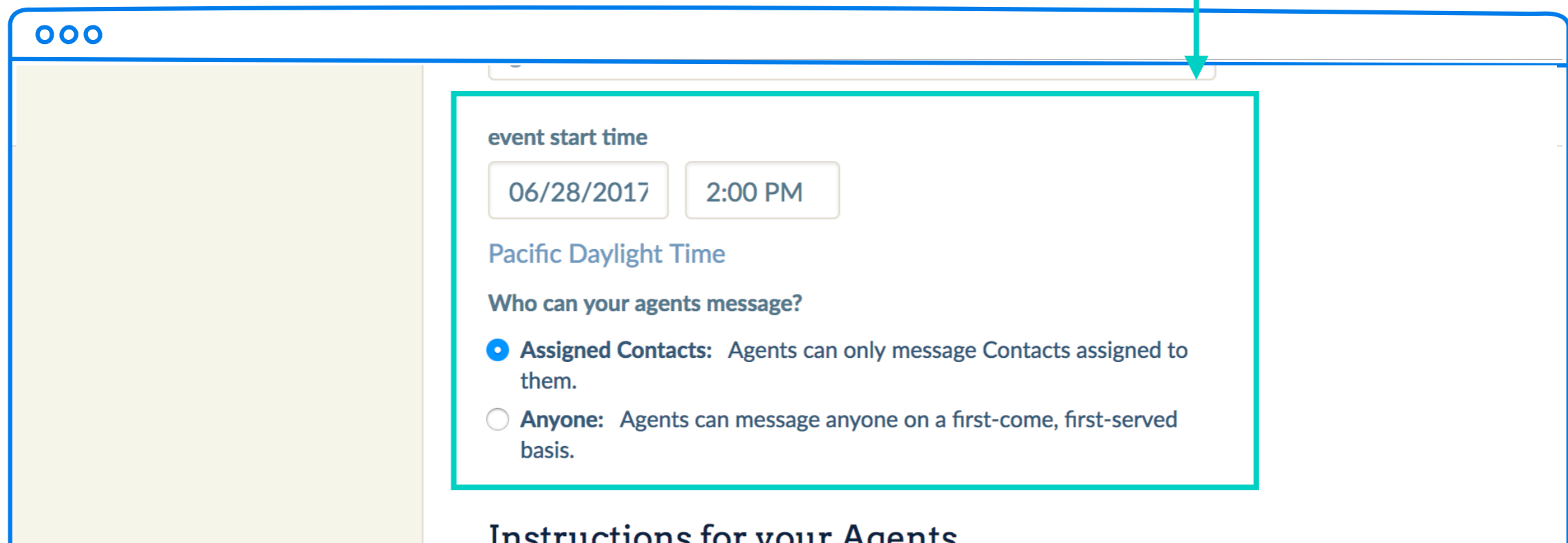
Choose a goal type from the dropdown depending on what you want to ask your contacts to do. Event Attendance, Volunteer Recruitment, and Legislative Contact have two steps: Invitation and Reminders . Raise Money and Re-engage only have one step. All goal types allow agents to track yes/no replies from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

The screenshot shows a web application interface for creating a goal. On the left is a sidebar with navigation options: 'Create a new group', 'West coast chapter', 'Manage groups', 'Reports', and 'Settings'. The main content area has a header with 'Goals 0', 'Agents 2', 'Contacts 20', and 'Settings'. Below the header is the 'Create a goal' section, which features a 'Goal type' dropdown menu. The dropdown menu is open, showing five options: 'Event Attendance' (selected with a checkmark), 'Volunteer Staffing', 'Contact Re-engagement', 'Raise Money', and 'Legislative Contact'. Below the dropdown, there is a field for 'event start time' with a date picker set to '01/28/2017' and a time picker set to '2:00 PM'. A teal arrow points from the text above to the 'Goal type' dropdown menu.

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.



The screenshot shows a configuration window for a goal. A teal box highlights the 'event start time' section, which includes two input fields: '06/28/2017' and '2:00 PM'. Below these fields, the text 'Pacific Daylight Time' is displayed. The 'Who can your agents message?' section has two radio button options: 'Assigned Contacts' (selected) and 'Anyone'. A teal arrow points from the top of the page down to the top of the teal box.

event start time

06/28/2017 2:00 PM

Pacific Daylight Time

Who can your agents message?


Assigned Contacts: Agents can only message Contacts assigned to them.

Anyone: Agents can message anyone on a first-come, first-served basis.

Instructions for your Agents

Adding tags and custom fields

○○○

Settings 

General Settings

Integrations

Bulk Import


Tags

Custom Fields

Tags are by default available for organizers to use on contact profiles. You can modify the visibility of a tag to show it as an opt-out reason instead, or hide it from organizers. All tags are available and visible to admins.

| Tag name | Where tags are visible | Actions |
|--------------|---|--|
| donor | <input checked="" type="checkbox"/> Lead profile <input type="checkbox"/> Opt-out reason <input type="checkbox"/> Admin eyes only | <input type="button" value="Edit"/> <input type="button" value="▼"/> |
| volunteer | <input type="checkbox"/> Lead profile <input type="checkbox"/> Opt-out reason <input checked="" type="checkbox"/> Admin eyes only | <input type="button" value="Edit"/> <input type="button" value="▼"/> |
| wrong_number | <input type="checkbox"/> Lead profile <input checked="" type="checkbox"/> Opt-out reason <input type="checkbox"/> Admin eyes only | <input type="button" value="Edit"/> <input type="button" value="▼"/> |

○○○

Settings 

General Settings

Integrations

Bulk Import

Tags

Custom Fields

Custom Fields are extra attributes that you can assign to your Contacts during a CSV upload. You can use them to more deeply personalize the scripts for your goals.

Add a new custom field

- County
- targeting

Removing a custom field

To have a custom field removed, please [Contact Support](#).

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

STEP 1: INVITATIONS

When
From before until before the event start time

Targeting

Contacts who...

are in this group

match all of the following organizational tags

don't match any of the following organizational tags

match custom fields and values

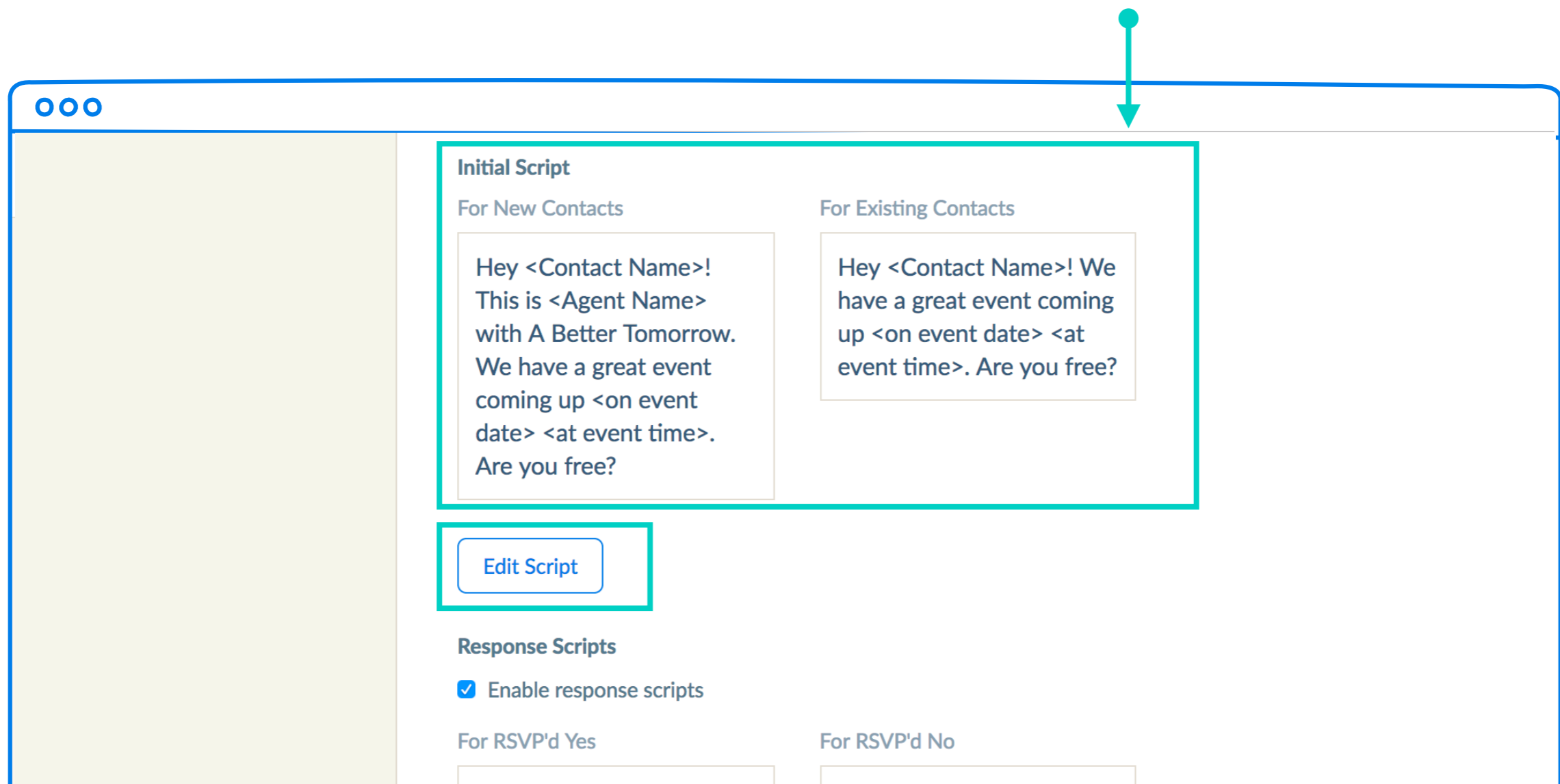
RSVP'd to events

Initial Script

For New Contacts For Existing Contacts

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.



The screenshot shows a user interface for editing scripts. A teal arrow points from the top of the page down to a teal-bordered box containing the 'Initial Script' section. Below this box is an 'Edit Script' button, also highlighted with a teal border. The 'Initial Script' section is divided into two columns: 'For New Contacts' and 'For Existing Contacts'. The 'For New Contacts' column contains the text: 'Hey <Contact Name>! This is <Agent Name> with A Better Tomorrow. We have a great event coming up <on event date> <at event time>. Are you free?'. The 'For Existing Contacts' column contains the text: 'Hey <Contact Name>! We have a great event coming up <on event date> <at event time>. Are you free?'. Below the 'Initial Script' section is the 'Response Scripts' section, which includes a checked checkbox for 'Enable response scripts' and two columns for 'For RSVP'd Yes' and 'For RSVP'd No'.

Initial Script

For New Contacts

Hey <Contact Name>! This is <Agent Name> with A Better Tomorrow. We have a great event coming up <on event date> <at event time>. Are you free?

For Existing Contacts

Hey <Contact Name>! We have a great event coming up <on event date> <at event time>. Are you free?

[Edit Script](#)

Response Scripts

Enable response scripts

For RSVP'd Yes

For RSVP'd No

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.

Initial Script

Edit Script

These are the suggested message scripts that Agents can send with one tap in the Hustle app.

For new Contacts ~277

Hey **Contact Name**! This is **Agent Name** with A Better Tomorrow. We have a great event coming up **on event date** **at event time**. Are you free?

+ Contact Name + Agent Name + on event date
+ at event time + <testcustom> + Emoji

For existing Contacts ~322

Hey **Contact Name**! We have a great event coming up **on event date** **at event time**. Are you free?

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.

The screenshot shows a web interface for managing goals. On the left is a sidebar with 'Manage groups', 'Reports', and 'Settings'. The main area has tabs for 'Active' and 'Completed', and a 'Create a Goal' button. A goal card for 'Johnny Appleseed Keynote Event' is displayed, showing it starts on June 28, 2017 at 3:00 PM. It has 10 invites sent (0 skipped) and 10 unresent. Below this is a progress bar and summary statistics: RSVP'd Yes: 2 with 0 reminders sent, and RSVP'd No: 1. There are 'Export data' and 'Refresh data' links. A table below lists the agent 'Angel' with 10 invites sent, 2 RSVP'd Yes, 1 RSVP'd No, and 0 reminders sent.

| Agent | Invites Sent | RSVP'd Yes | RSVP'd No | Reminders Sent |
|-------|--------------|------------|-----------|----------------|
| Angel | 10 | 2 | 1 | 0 |

STEP 6

Check out [the guides for hustling](#) with the web and native apps

