Email Blasts 2.0.1:
- Messages with an auto-tag
- Messages with field labels used to populate a google form
- Using both together

(Note: This guide assumes you know how to create google forms)

Updated December 2020

Short introduction

Inserting field labels in an email blast is an interesting way to create hyperlinks that can be used to tag your members or even partially pre-fill reply forms.

This guide, intended for people already familiar with the fields in our database and who also know a bit about google forms, starts from the most basic use, then moves on to more complex combinations of tags and tokens.

The simplest use (1.) is an auto-tag to identify members (ex: voting status) or tag them for a bulk operation (ex: to update their last verified date).
The principle is for the member to click a link that tags their record and then directs them to a specific page on the DA website.

You can also use field labels to direct members to a google form where some fields are automatically filled (2.). This can be useful in updating your members' data, sending a survey or even voting in your country/chapter officer elections.

An auto-tag can also be combined with a google form, in the same email, for a multi-purpose message (3.).

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1. Using an auto-tag to identify and manage members

The auto-tag is useful when you want to identify members (such as voting status) or tag them for a bulk operation (ex: to update their last verified date).

To do so:

1. Create the tag or (even better) choose an existing global tag such as: new-volunteer, or one recommended for a specific membership verification campaign (like 2021selfverifyCC).

2. Here is the base code to adapt for the link in your email blast (IMPORTANT – add this link in the email itself, not in your source Word document because some of the characters – like the squiggly brackets – may not be coded correctly!!):
   http://response.democratsabroad.org/tagger/?id={{recipient.id}}&tag=tagtitle&redirect=pageslug

3. Change these variables to:
   tagtitle= name of your tag (ex: 2021selfverifyCC or 2020 Submitted Ballot)
   pageslug= landing page (the part of the url that follows democratsabroad.org/) ex: volunteer, fr, be_events or thanks

   Example: The following example will tag members as confirmed and redirect them to the main country page for Spain: http://response.democratsabroad.org/tagger/?id={{recipient.id}}&tag=2021selfverifyCC&redirect=es

2. Using hyperlinks with an auto-filled google form

This is particularly useful when you want your members to fill in a form to update their member data, or even vote online for your country/chapter officer elections.
You can create a form that is automatically populated with data in your members' records, especially member id, email address and so on.

The steps involved are described in the following pages.

2.1 Know which fields you want to be autofilled – and ideally have them ready to copy/paste.

2.2 Prepare the complete google form – both auto-filled and non-filled questions

2.3 Finalize the form in a special way and create the response sheet

2.1. Know which fields you want to autofill and have the codes ready to copy/paste

Below are the most common field labels – it's **best to copy/paste them** from this file rather than typing them in (especially the squiggly brackets). (Contact the Helpdesk if you need a specific field.)

A recent feature in email blasts now enables you to insert some of the basic labels in the form of "smart fields".

Membership id: {{recipient.id}}

First name and last name: {{recipient.first_name}} {{recipient.last_name}}

Email address: {{recipient.email}}

Home (primary) address: {{recipient.home_address.address1}} {{recipient.home_address.city}}, {{recipient.home_address.state}}, {{recipient.home_address.zip}}, {{recipient.home_address.country_code}}

Voting (registered) address: {{recipient.registered_address.address1}} {{recipient.registered_address.city}}, {{recipient.registered_address.state}}, {{recipient.registered_address.zip}}, {{recipient.registered_address.country_code}}

Phone numbers: {{recipient.phone_number}} {{recipient.mobile_number}}

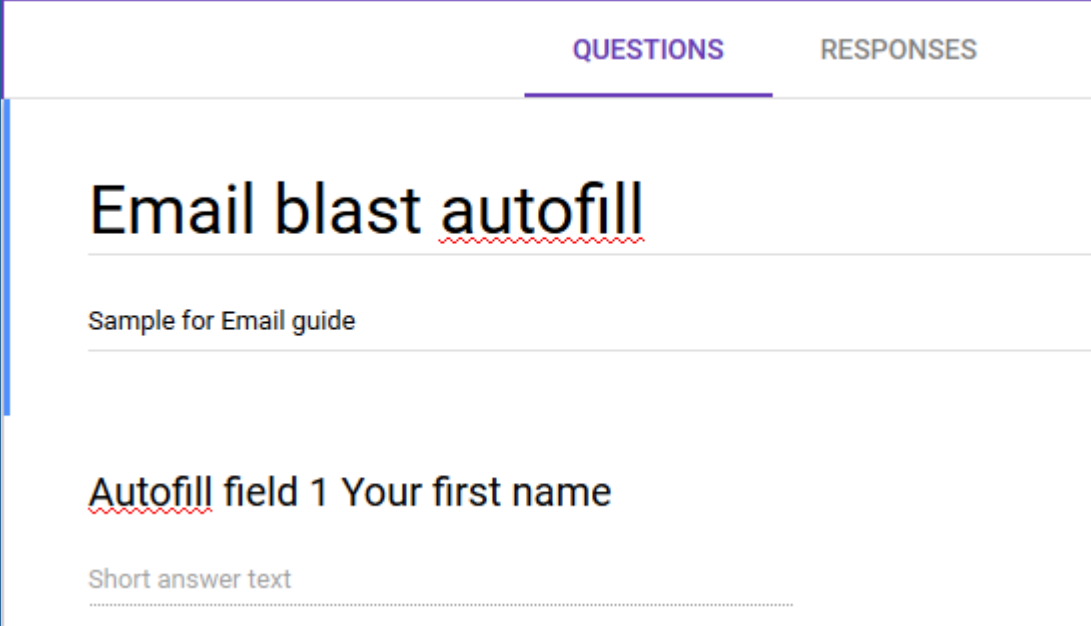Membership Expiry Date: {{recipient.membership_expires_at}}
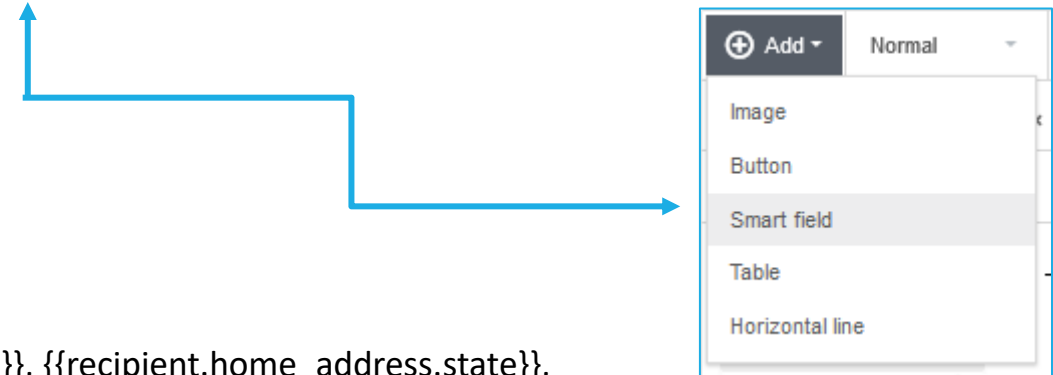
TIP: Before you finalize your google form don't forget to prepare and send a simple test message with the field codes you want - to make sure they are correct.

2.2. Prepare the google form

- Create a new google form
- Add all the questions, both those to be filled in automatically (member id, email address, address on file, etc.) as well as all the other questions.

Tip: Before you go on to the next step, it's a really good idea to have your google form as finalized as possible to make sure you will not need to add the the field codes again.

QUESTIONS   RESPONSES

Email blast autofill

Sample for Email guide

Autofill field 1 Your first name

Short answer text

## 2.3.1 Finalize the form in a special way

1. Once you've added all your questions to the google form, click the little MORE dots in the upper right of the screen to open the menu and click Get pre-filled link

2. This will open a new screen with the prompt "Answer questions you want to pre-fill, then click submit" - Copy and paste the appropriate field label(s) in the answer section of each question.

3. When finished click Submit, and then carefully select and copy the link that will be displayed at the top of the screen. Paste it into Notepad to keep it safe for now.

2.3.2 Match the Response spreadsheet to the google form

To make sure you have a separate response form for your google form:

1. Click **RESPONSES**
2. Click Select Response destination.
3. On the next screen click Create a new Spreadsheet and accept the default name written in (so it will have the same name as your google form).
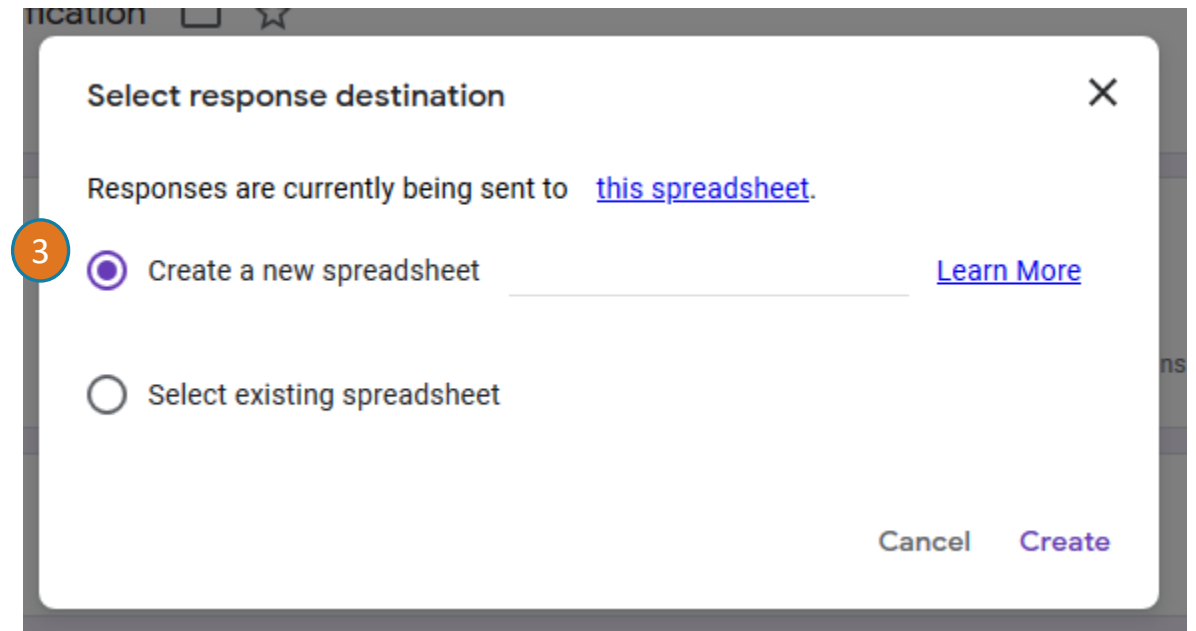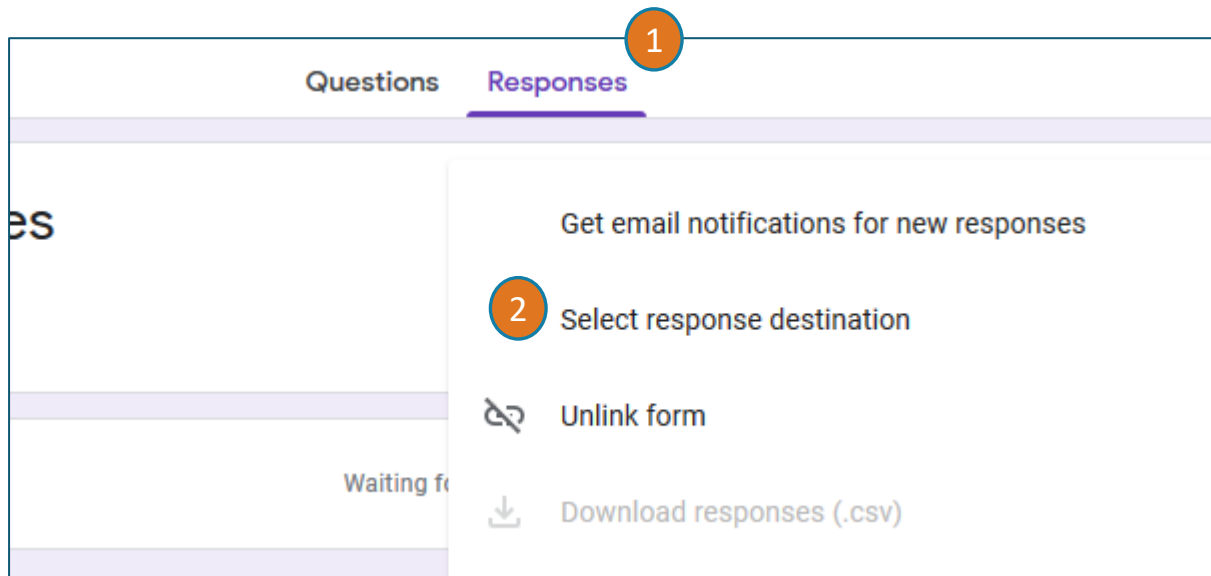
3. Elements of an email combining both an auto-tag and the link to a google form

Here are some sample elements (field labels or smart fields) to include in an email where you:

-Display some data from the members' records:

Are you still a US citizen?
Do you still live in
{{recipient.home_address.city}}, {{recipient.home_address.state}}, {{recipient.home_address.country_code}}?

Is your voting address in **{{recipient.registered_address.city}},**
{{recipient.registered_address.state}} {{recipient.registered_address.zip}}?

- Invite them to either confirm the above information is correct and be auto-tagged (1) or else open a google form where their data is pre-filled (2)

1) If you can answer "YES" to all of the above questions, please <u>click here to confirm</u>.
2) If updates are needed - or if you'd like to provide us with a phone number so we can call you with urgent voting updates, please <u>fill in this quick form</u>.

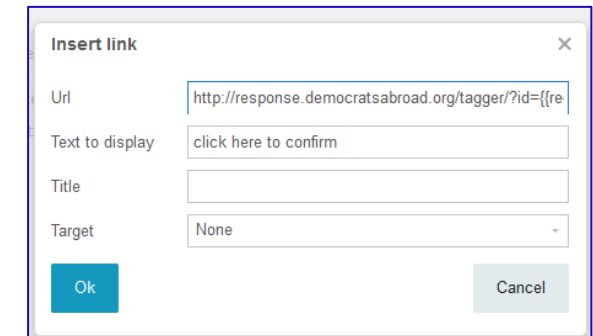# 4. Your email blast: Hyperlink in your email blast

1. In the body of the message, click the word(s) you wish to hyperlink, paste the auto-tag link (see slide 4) or the google form hyperlink (see slide 8) in the dialogue box. Then click OK to insert.

2. It's a good idea to add a few words in the email explaining the form opened by the link.

Make sure you send yourself a test mail to check the fields.

And Voila!

If you can answer "YES" to all the above questions, please **click here to confirm.**
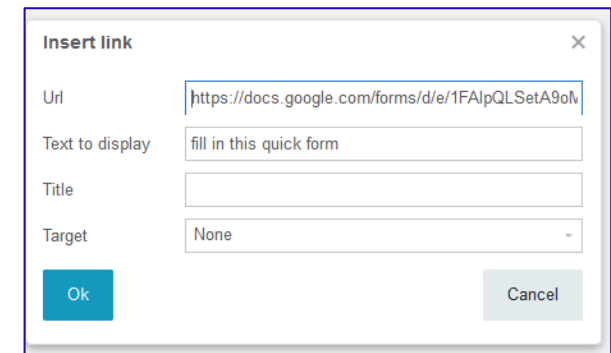
If updates are needed - or if you'd like to provide us with a phone number so we can call you with urgent voting updates, please **fill in this quick form**.

5. Reusing a google form
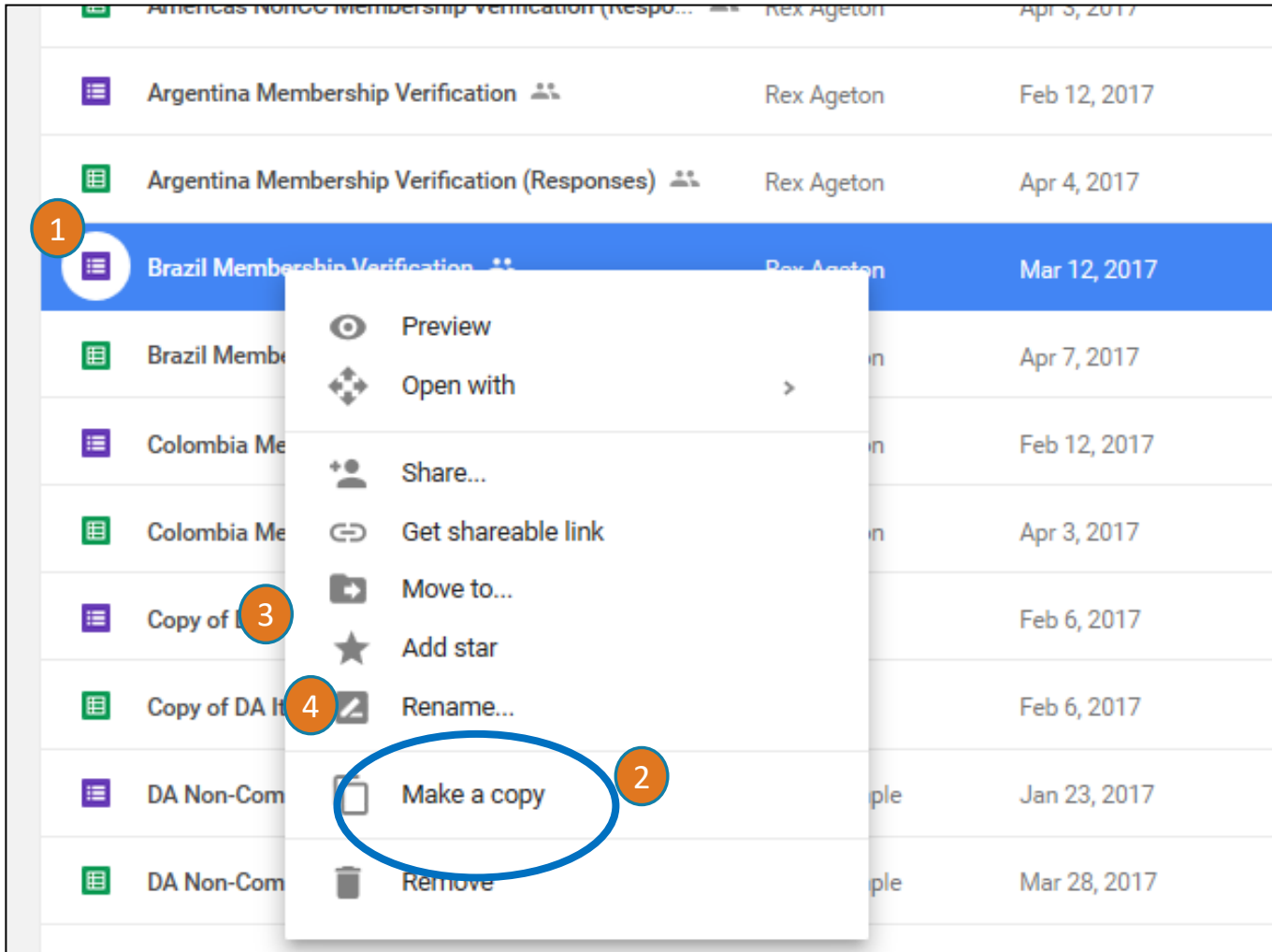
If you decide you'd like to re-use an earlier form, to make sure you don't mix things up you need to make a copy of the original form.

1. Right-click the file
2. Choose Make a Copy. The copied file will be named Copy of......).

3. Right-click on this Copy of.... File.

4. Select Rename and give it a completely different name AND also see slide 9 on how to create a new spreadsheet for the Responses.

When to contact a global admin

Contact the Global Admin mailbox   helpdesk@democratsabroad.org * if you

• Have forgotten your info-* login password – do not change it yourself – this is being done centrally

• Need data extract (Excel spreadsheet)

• Need an import of data (must have had an export first since need the member ID in the file)

• Have questions not covered in anything on the wiki under FAQ, training video, training material – you are expected to look there before asking

•If you need to **add or remove a person from membership access rights**, use our wiki page:
http://wiki.demsabroad.org/display/MembDBcnda/DA+Website+and+MembDB+Admin+Requests