

DA Country Committee Email Blasts

SUMMER 2019

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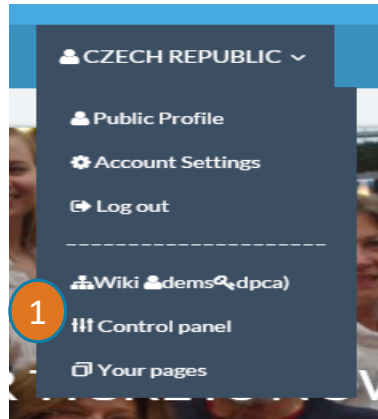
Rules for the emailing admin login

- The **login to use** for membership and/or emailing is the one you receive after passing certification. It looks something like:
info-yourcountry@democratsabroad.org or info-CC-yourchapter@democratsabroad.org
- The Global Helpdesk/IT team are the **only ones who can give out logins. Do NOT share yours with others.**
- For data safety, when writing to the Helpdesk, **NEVER ever send us the password!! We do not need it.**
- You **DON'T need to activate** this login and you **should never** reset the password yourself. Simply enter the info-... email address and password that you were assigned.
- If you get an **error message** that the email address and password don't match, check that a space hasn't snuck in somewhere at the start or end of the info-... email address or password.
- ***Do not link the login to your personal facebook page or add your personal data to the login record.*** Both actions will change the name making it impossible to assign people to your chapter/country.

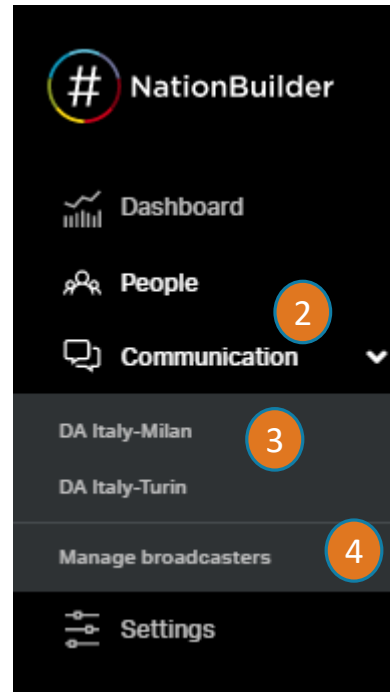
Broadcaster – What's that?

- Each DA country, chapter, etc. group or subject group has a “broadcaster” linked to its address. All our external email communications are organized around broadcasters.
- A broadcaster can send messages using various different ***sender names***, but it will always use the same ***email address*** – that of the organization it represents (global, country or chapter).

How to Access your Broadcaster



1. Open your tool bar & click “Control panel” to access your main Dashboard.



2. Click “Communication” to view broadcaster list.
3. Then click your broadcaster name.
4. If you don’t see your broadcaster name in the initial drop-down list, no worry – simply click Manage Broadcasters to open the whole list and use the browser’s search button to find your country/chapter name to open your broadcaster.

Broadcaster Dashboard

Communication > Search people...

DA Italy ONLY ITALY CAN SEND

New email blast 1

Email: Info-Italy@democratsabroad.org · 162 email blasts · [Passionate Democrats Serving You](#)

Text: none · [Add text messaging](#)

Twitter: none · [Connect Twitter account](#)

Facebook: none · [Connect Facebook page](#)

Dashboard Email Settings

+ New blast Blast Scheduled

Author	Name	Sent	Opened	Clicked	Donations	Unsubs
Italy	Italy Election Results	3183	725 (22.78%)	23 (0.72%)	0	0

1. When you open your broadcaster window you can Start a new email blast by clicking “New Email blast” at the top.
2. You can also click the Email link to either send a new blast or review past emails. Click on hyperlinked references for more detail on each message (for more information see [slide 23](#))

EMAIL BLASTS
Nationbuilder calls emails sent to groups of people “blasts.”

Naming, IDing and Cloning

1. NAME: and AUTOMATIC SLUG:

- Give your new blast a short name to identify the subject.

- Press the TAB button. This automatically generates the “slug” (a required document identifier that does not appear on the delivered emails).

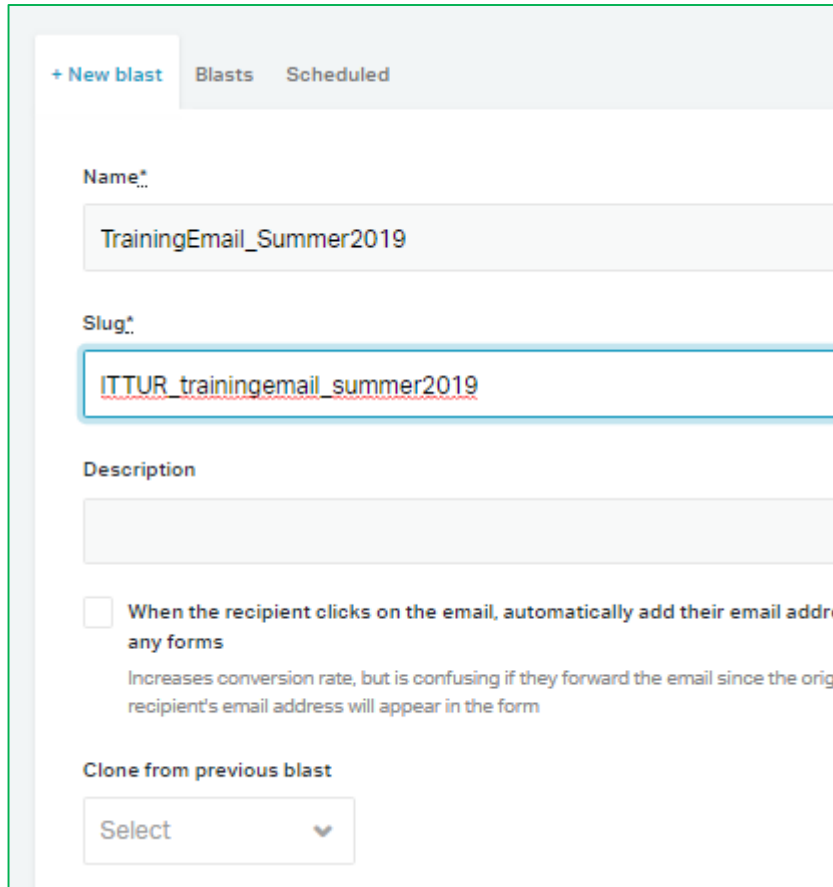
As the identifier is unique across whole platform, customize it by beginning your slug with your country’s ISO code and a 1-2 character chapter identifier (DE for Germany, CAVN for Canada-Vancouver, etc.) and possibly adding the date. The character-limit is 30.

DESCRIPTION: This not obligatory and actually no longer helpful since it does not show up on your Emailing dashboard.

2. CLONE:

You can clone a previous email, for example for reminders or similar emails you send out regularly. If you wish to clone an earlier email, select it from the dropdown list.

Click “**Create and edit email blast**” to move to the next screen.

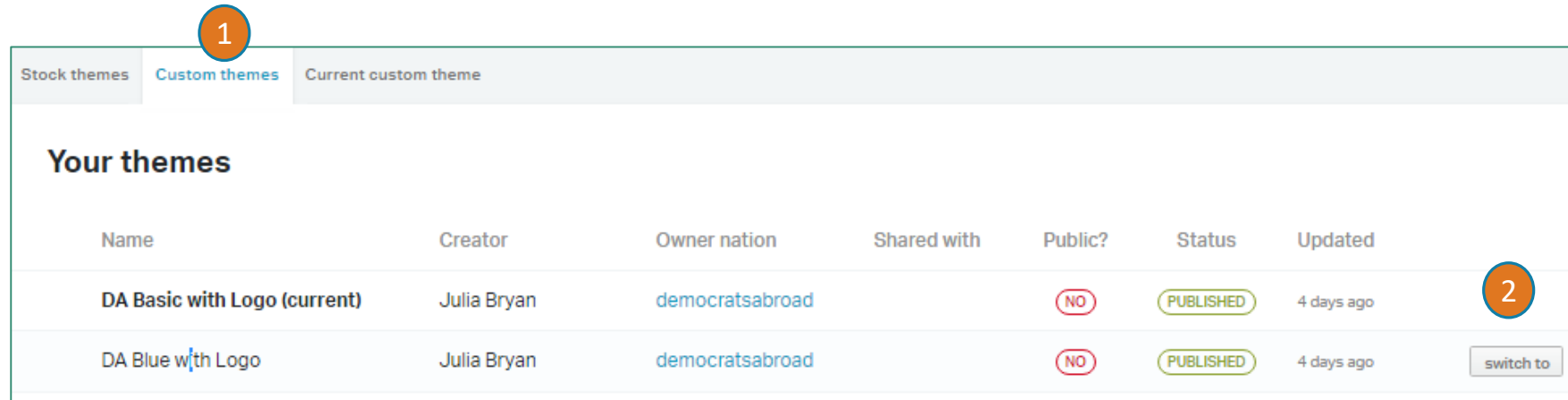


The screenshot shows a web form for creating a new email blast. At the top left, there is a '+ New blast' button and two tabs: 'Blasts' and 'Scheduled'. The form has three main sections: 'Name:', 'Slug:', and 'Description'. The 'Name:' field contains the text 'TrainingEmail_Summer2019'. The 'Slug:' field contains the text 'ITTUR_trainingemail_summer2019' and is highlighted with a blue border. The 'Description' field is empty. Below the 'Description' field, there is a checkbox labeled 'When the recipient clicks on the email, automatically add their email address to any forms'. Below this checkbox, there is a small text block: 'Increases conversion rate, but is confusing if they forward the email since the original recipient's email address will appear in the form'. At the bottom of the form, there is a section labeled 'Clone from previous blast' with a dropdown menu that currently shows 'Select'.

1

2

Choose a Theme



Name	Creator	Owner nation	Shared with	Public?	Status	Updated	
DA Basic with Logo (current)	Julia Bryan	democratsabroad		NO	PUBLISHED	4 days ago	
DA Blue with Logo	Julia Bryan	democratsabroad		NO	PUBLISHED	4 days ago	switch to

1. Choose the “ Custom themes” tab to access Democrats Abroad email themes (even though there are several themes listed, the only ones available for use are the first two).
2. To change your theme, click on the one not in Boldface and click the “switch to” that appears. (Note: when you clone a page, this option will probably not appear).
3. If you want to insert your own country logo at the top of an email, switch to the Custom Header “DA No Logo White” and insert your logo, as you would for any other image (see [slide 14](#)).

Note: It's vital to use DA custom themes as they include the DA footer with opt-out and address information.

Preparing ahead - Uploading & Hyperlinking Files and Images to go into the message



Adding .docs and .pdfs
Right click and copy the file link for pdfs and docs, then use the hyperlink button in the content editor.

1

2

3

4

File name	Size
 DemsAbroadBannerStar_(2018_04_02_17_18_37_UTC).jpg <- image	9.54 KB
 Emailing_FindBroadcaster.pptx <- file to hyperlink	105 KB

1. Add a file by clicking the “Files” * tab on the main screen. This is the place both for document files (ex: pdf) and for images (if easier than direct upload).
2. Click “Select files to upload” to browse files on your computer or drag them into the box.
3. **For hyperlinks to files (.pdf etc.)**– you need to have the url in your clipboard to link it.
Tip: If you have several files to hyperlink, select, copy and paste all the links on this page into a word file, so you can work one by one.
4. **Images** are simpler as they are listed on your message’s Image icon. See [slide 14](#) for more information.

* **Note:** You can open the Files tab at any time, but if you’ve added text in the Content tab make sure you SAVE it before leaving that page.

The Content screen – where it all comes together

We will review the various parts of this screen in the pages that follow, but here are the main changes:

Don't feel cramped by the content editor box on the right!

1. Click and drag the line between the 2 boxes to expand the editor box,
2. OR, click the Fullscreen button to create your message, then after clicking Save content (at the bottom) collapse the screen to review.
3. If you want more space, click the arrow at the bottom of the black side menu to collapse it.
4. The [Send test email](#) button is now just above the content box, to the right.

The screenshot shows the NationBuilder interface for editing an email. On the left is a black navigation sidebar with icons for Dashboard, People, Communication, and Settings. The main area is titled "ittur_trainingemail_summer2019" and includes a breadcrumb trail "Broadcasters > DA Italy-Turin > Emails". Below the title are tabs for Dashboard, Settings, Files, Theme, Content (selected), Recipients, and Review and send. The "From" field contains "Changeable Sender Name" and the "Subject" field contains "Obligatory Subject line". A "Send test email" button is located at the top right. The main content area displays a preview of the email with the "DEMOCRATS ABROAD" logo and text. A rich text editor is visible on the right side of the preview. A "Live site" button is at the bottom left of the sidebar. A "New layout!" text and a cartoon chick icon are in the bottom right corner. Four numbered callouts (1, 2, 3, 4) highlight specific UI elements: 1 points to the desktop/mobile/text tabs, 2 points to the rich text editor, 3 points to the bottom arrow in the sidebar, and 4 points to the "Send test email" button.

The Email Content Editor - Components of an email blast

The screenshot shows an email content editor interface. It is divided into several sections:

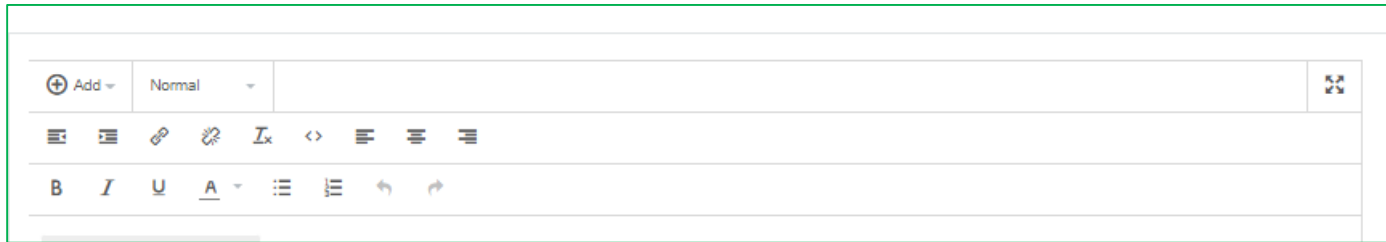
- From:** A text input field containing "Changeable Sender Name". To its right is a "+ Add variant" button. A blue bracket highlights this button and another "+ Add variant" button located below the Subject field.
- Subject:** A text input field containing "Obligatory Subject line".
- Rich Text Editor:** A toolbar with various icons for text formatting (bold, italic, underline, text color, background color, bulleted list, numbered list, link, unlink, indent, outdent) and a "Normal" dropdown menu. Below the toolbar, the text "First name or 'Friend' --" is visible, followed by "Broadcaster name" and a blue hyperlink "Primary site URL".
- Save Content:** A large grey button labeled "Save content" at the bottom left of the editor area.

Four orange circular callouts with numbers 1, 2, 3, and 4 are overlaid on the interface:

- 1: Points to the "From" field.
- 2: Points to the "Subject" field.
- 3: Points to the "First name or 'Friend' --" text in the rich text editor.
- 4: Points to the "Save content" button.

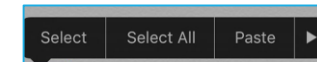
- 1. From:** Although you can't change the sender email address, you *can* edit the From name as you wish, for example: Mary Seat – Chapter Chair or Calen Dar – Events Chair.
- 2. Subject** – keep subjects short & pithy. (Only VERY experienced Comms experts should attempt the Variant options.).
- 3. Message:** The next pages will explain how to enter and format content, adding images and file hyperlinks. The template already includes a “first name” and broadcaster token. For spam-filter reasons your message should be written out in the box, not saved in a page-size jpg poster (see [slide 14](#)).
- 4. Once you've finished your text, click “Save content”.** Once your work is saved, you can move back and forth among the other links.

The New Email Editor - Entering content



You can obviously type directly in the screen, but it's easier to paste formatted text into the composition screen:

- **Keyboard:** Use **Ctrl+V** (PC), **Command ⌘ V** (Mac) - **Touch screens** follow the usual steps:



A few things to do directly on-screen:

Add the **colors** to your words in NationBuilder – they don't transfer from word processing.

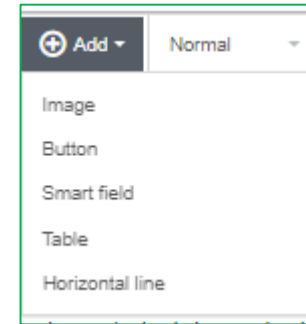
Don't spend a lot of time, entering complicated **paragraph numbering**. Do this in NB and in some cases you may have to cheat and simply type a number in front of your paragraph.


TIP: To keep a consistent **line spacing**, it's helpful in your Word file to replace the paragraph mark (^p) with a manual line break ^l (circumflex lower case l). You'll need to retain the paragraph mark though if you want special formatting for a paragraph.

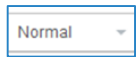
HTML coding – you can enter, paste, change or copy the source code by pressing the <> icon.

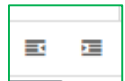
TIP: HTML experts will find it easier to fix the line spacing by substituting some <p> with

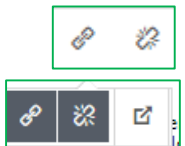
The new Email editor – Formatting 1




The main change here is the  that groups several advanced options (See pages 14-17), and the breakdown of the other formatting icons into 2 toolbars.

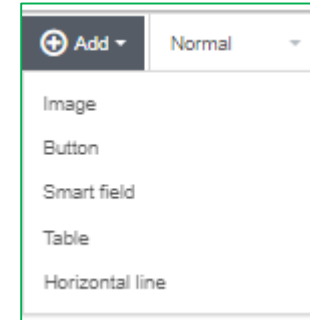
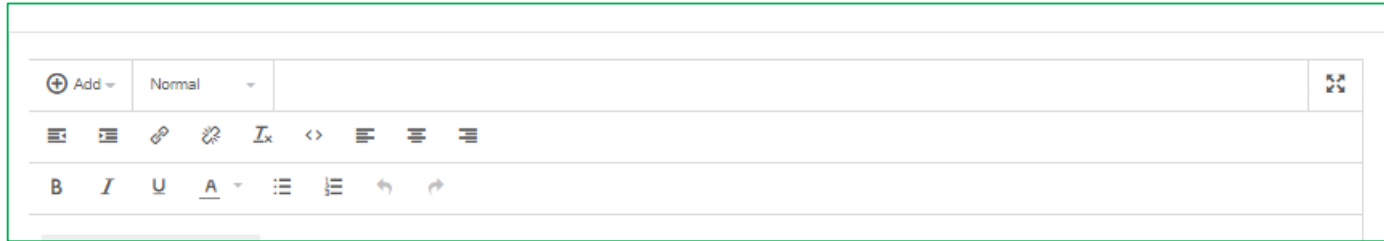
 To change **font size** open the Font style box and choose one of the Heading sizes. The results aren't always what we expect here, though, so play around with this and send test emails to a couple people with different email programs.


 **Indents:** This option has been slightly improved and functions like a normal paragraph indent command.

 **Hyperlinks:** The hyperlink icons are really handy for inserting/editing, unlinking and opening a hyperlink (available on the second icon set displayed when you mouse over a hyperlinked text).


 The **Remove Formatting** function may come in handy to start from scratch if the formatting you had set doesn't look like you had expected.

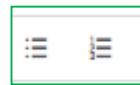
The new Email editor – Formatting 2



 The **Source code** icon is used to insert, copy and edit HTML code. It can be helpful when you want use your email as the basis of a web posting.

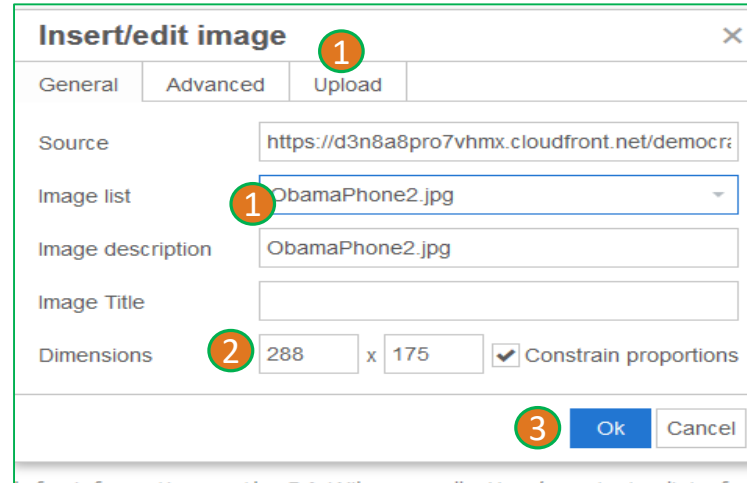
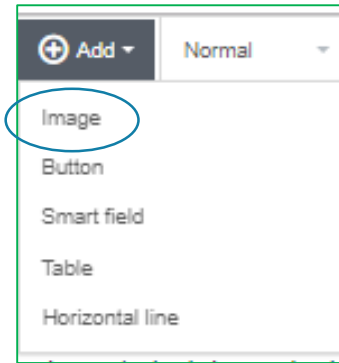
 The **text justification** buttons work both for text and images (see [slide 14](#) on images).

 The formatting buttons work like any other program and need very little explanation.

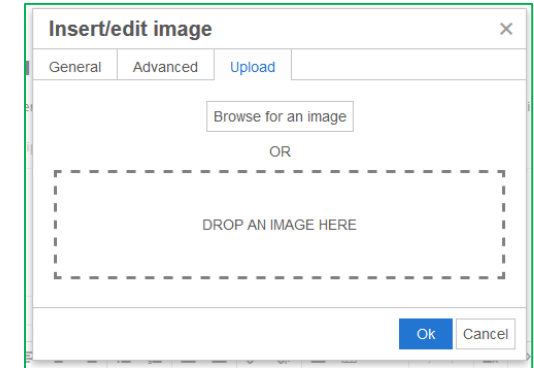
 Like any Numbered List or Bullet List, these formatting options take a bit of time to figure out. It's often best to add these here in NationBuilder rather than trying to get numbering set in word processing to work.

 And what would we do without our friends UNDO and REDO!!

The new Email editor – Add+ Box: Adding an Image

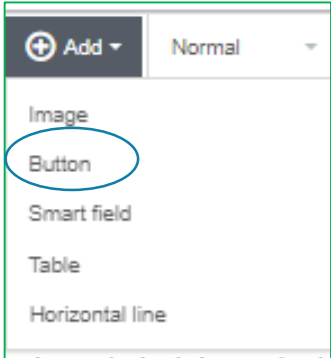


Browse screen after clicking upload →



1. Use the image icon on the text editor to insert an image (jpg or png) in the message screen.
 - You can upload an image from your PC using the **Upload** Button,
 - Or you can click the **Image List** to select a graphic file that you've already uploaded (see [slide 8](#)). Click **OK** to insert the image (there is no preview in the dialogue box).
2. Change the size in the General box or open Advanced settings to adjust horizontal and vertical spacing or border. Remember that the ratio between text and image affects whether email programs consider a message as spam or not.
3. To position the image use the alignment icons in the taskbar of the message itself. Left and right justified can be used to position your image next to your text.

The new Email editor – Add+ Box: Adding a Button



Buttons are great for grabbing your readers' attention – to get them to RSVP, volunteer or confirm their membership.

Button text: the message readers will see

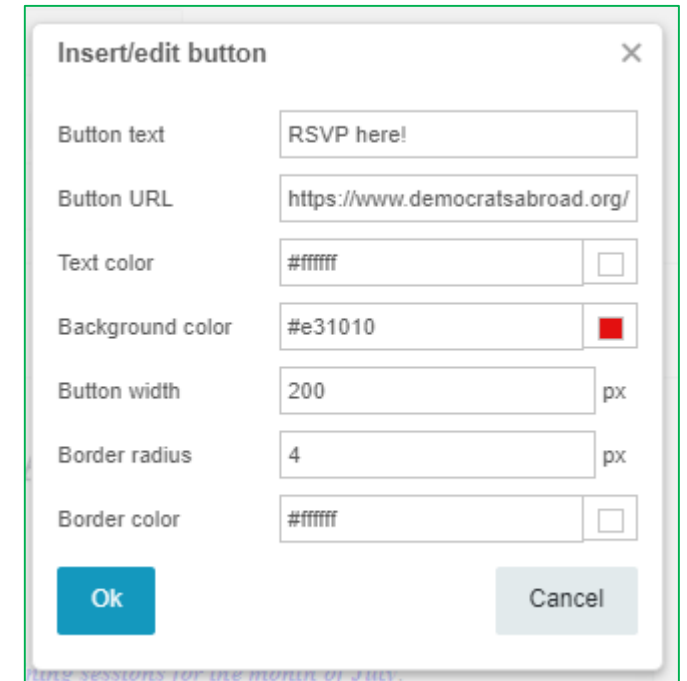
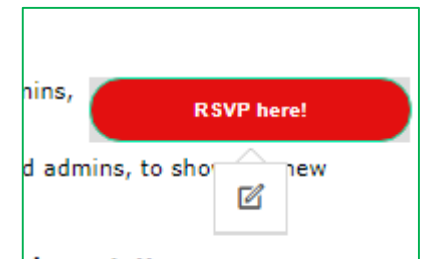
Button URL: where clicking will send them to

Colors: Text, Background, and Border: click the colored box on the right to choose your color

Button width: the one shown on this page is 200 – but you want to adapt it to the button text

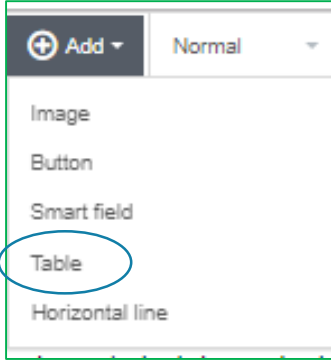
Border radius: this determines the roundness of your button. The higher the number, the rounder the edges will be

To re-edit, click on the button and a tiny Edit icon will appear

A screenshot of the 'Insert/edit button' dialog box. The dialog has a title bar with a close button (X). It contains several input fields: 'Button text' with the value 'RSVP here!', 'Button URL' with the value 'https://www.democratsabroad.org/', 'Text color' with a hex code '#ffffff' and a white color swatch, 'Background color' with a hex code '#e31010' and a red color swatch, 'Button width' with the value '200' and 'px' unit, 'Border radius' with the value '4' and 'px' unit, and 'Border color' with a hex code '#ffffff' and a white color swatch. At the bottom, there are 'Ok' and 'Cancel' buttons.



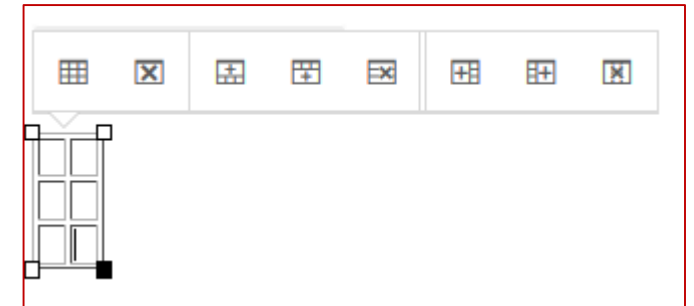
The new Email editor – Add+ Box: Adding a table simply



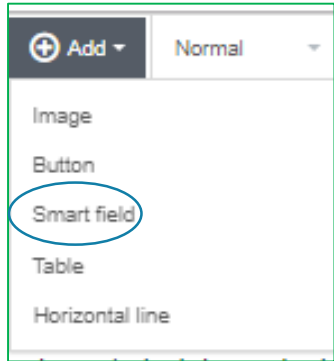
Tables can be interesting for various things – regular table purposes or else to align small images with text. It's best to take some time to play around.

- Start with parameters that are at least Width 40px and height 10px and add a border= 1.
- Use Advanced to choose the table border style and color or the background of the table itself.
- Click the individual icons to open the Table Properties, delete the table or add or remove rows or columns.
- You can generate a table like the one on the right. Click on any corner box to expand the table. But we still need to test ways to adjust the width of each individual column.

New feature!



The new Email editor – Add+ Box: Adding a Smart Field

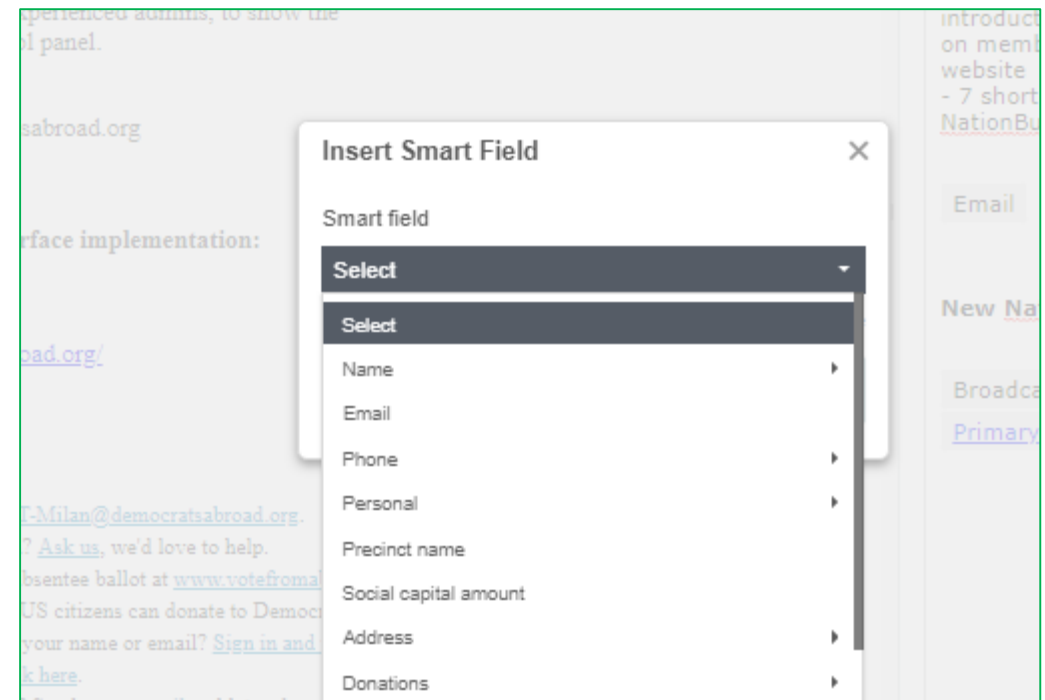
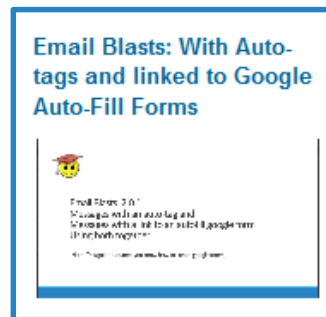


This is a new feature that hasn't been widely tested yet.

New feature!

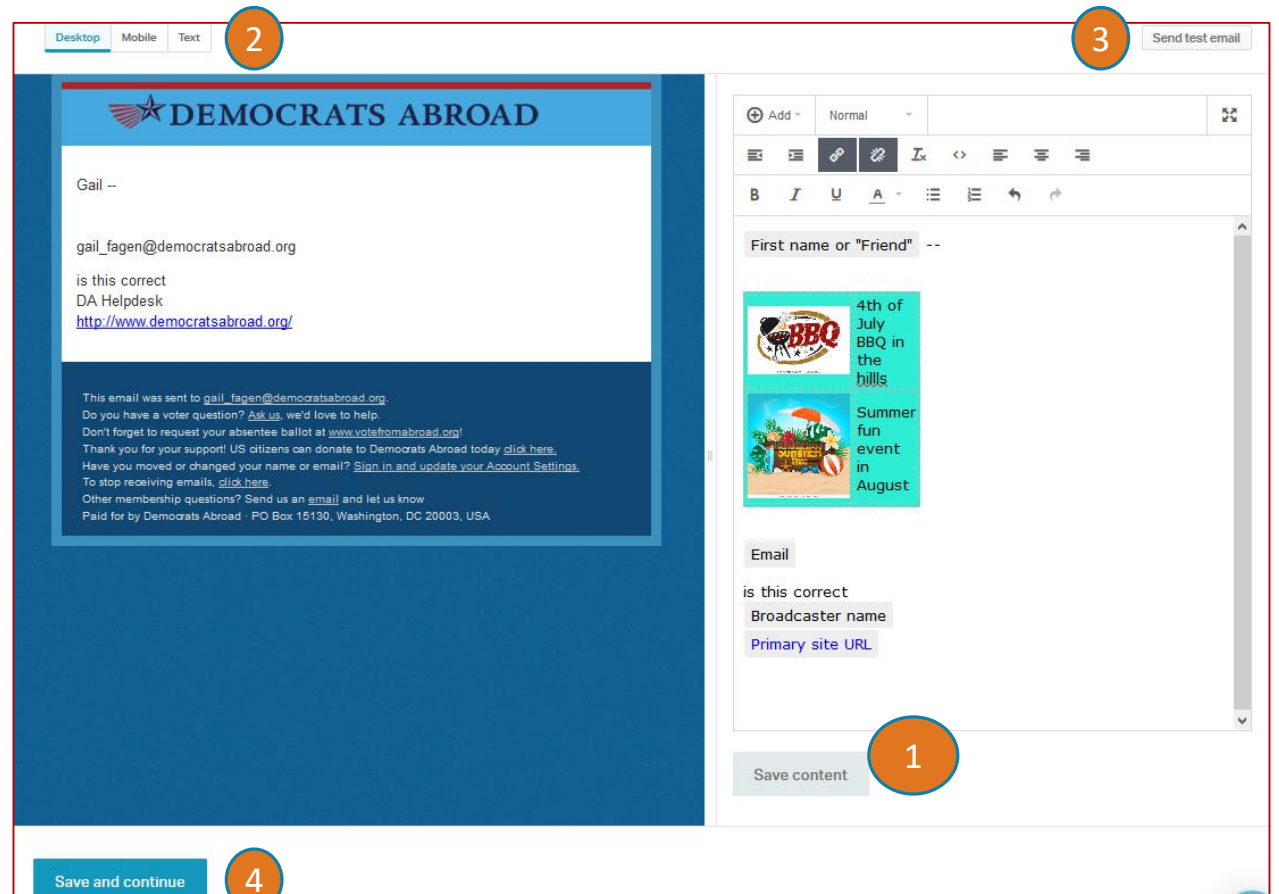
NationBuilder proposes a limited number of Smart fields, from the member recipient's record, that can be inserted in an email. Not all are relevant for our work, but some may be helpful for membership clean-up campaigns.

Experienced emailers can also consult a guide on how to add a more customized set of smart fields to their messages. Click here:



Saving your email - first Preview and Test Email

1. You can Save your message at any time and then Preview it in the screen to the left, adjusting the size of the 2 screens as shown on [Slide 14](#).
2. You can choose to Preview in Desktop or Mobile to have an approximate idea of the layout – spacing, image positions etc.
3. The **Send Test Email** button is now located just above the content screen. It's especially important to make sure all links work and that line spacing looks ok. You can add send to one or several addresses, separated by a comma. Note: The test email looks just like the real one, so warn people before you send them the test!

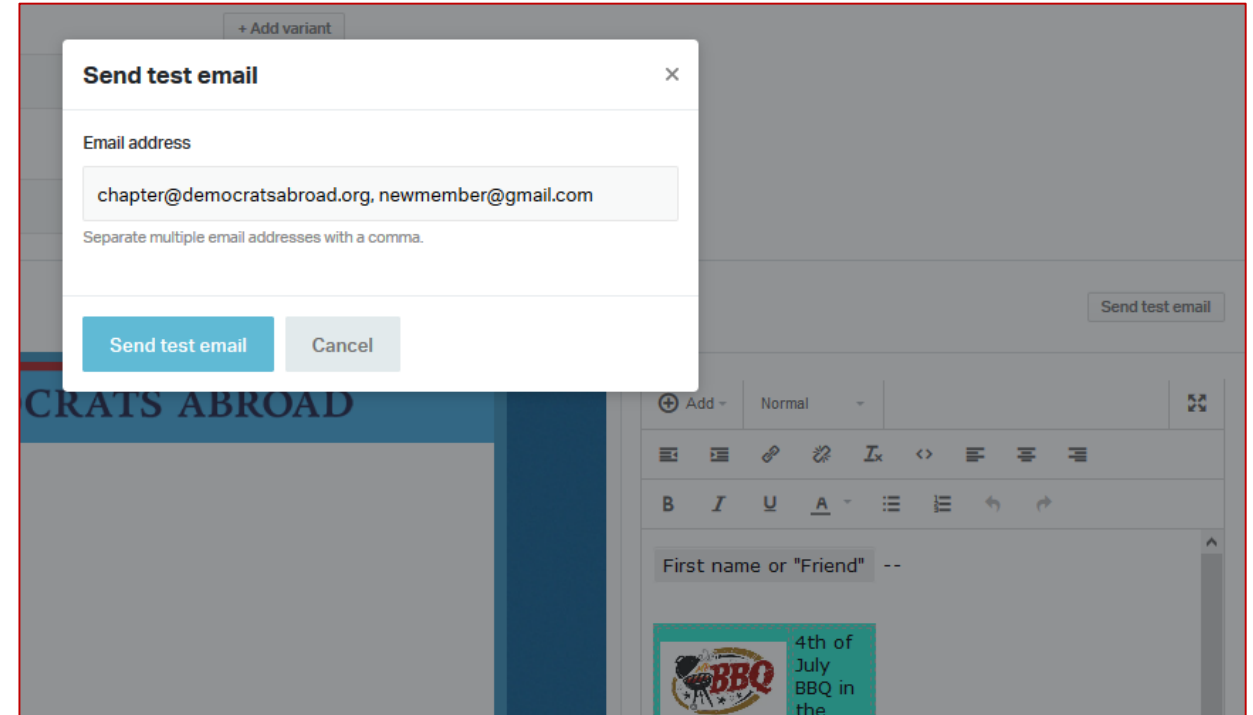


4. Once you're ready to move on to the next steps, click Save and Continue.

Other uses for a test email

Although it's highly recommended to send a test email each time to check formatting and links, the test email can be useful for other purposes:

1. Resend the email on an event to a newly joined member.
2. Copy one or several people on an email blast they wouldn't have received otherwise (ex: copying fellow chapter chairs, or country chair).
3. This may also be a way to send a formatted welcome message to someone who has just moved to your country or chapter, or else to one or several individual new members.



Recipients

Broadcasters > DA Helpdesk > Emails >

jp_august_newsletter_2019_kf

Dashboard Settings Files 2 Theme Content Recipients Review and send

Send to

Supporters

Prospects

Matching

List

Tags

Filter

filtered by

Global Hispanic Caucus

All

Will send to 481 of
60 people don't have en

Save recipients Save and review

On the next screen, choose the recipients.

- 1. Supporters:** this is the default – no need to touch
- 2. Matching:**
 - All** = everyone assigned to you as point person (=your whole chapter or country)
 - Tags** = members with a particular tag or any of a set of tags
 - Filter** = meeting the criteria of a saved (dynamic) filter
 - List** = static lists (“snapshots”) you can create in membership
- 3. FIRST** Click “Save recipients” to save and see your recipients.
- 4. THEN** Click “Save and Review” to move to the final screen.

Recipient Filters “Partial Opt-outs”

People who have opted out of all email messages are obviously left completely off our mailing list, **but** members also have the right to **opt-out of certain types of messages** (you can see this for yourself if you click the link in the opt-out sentence of the email footer).

Country and chapter broadcasters just need to ***select their Region’s filter.***

(EMEA is split into 2 filters:

- EMEA-1 = most European countries
- EMEA-2 = Finland, France, Italy, Romania, Switzerland, South Africa, Israel, Lebanon, Turkey, UAE)

Filter to choose if you are sending a message about:

Fundraising/Donations: Region-CC-Email-Fundraiser

Tax issues (FATCA, etc.): Region-CC-Email-Taxation

Voting information: Region-CC-Email-VoterAlerts

Tip: to find your tag begin typing either Email or Fundraiser, Taxation

Matching

List

Tags

Filter

All

filtered by

Select ▲

Email | ✕

- Americas-CC-Email
- Americas-CC-Email-Fundraiser
- Americas-CC-Email-Taxation
- Americas-cc-email-VoterAlerts
- AP-CC-Email
- AP-CC-Email-Fundraiser
- AP-CC-Email-taxation

Review and Send your Email Blast

Dashboard Settings Files 2 Theme Content Recipients **Review and send**

From: DA Helpdesk Karen F <helpdesk@democratsabroad.org>
Subject: test test
Recipients: supporters with filter Global Hispanic Caucus

Preview Desktop Mobile Text

DEMOCRATS ABROAD

Gail --

4th of July BBQ in the hills

Summer fun event in August

gail_fagen@democratsabroad.org
is this correct
DA Helpdesk
<http://www.democratsabroad.org/>

Send email now to 481 people Schedule

1. You can have a final look at your message in both PC or mobile format as well as flat text. (The layout just gives an approximate idea.)
2. You can still return to any screen to edit, add files or check.
3. When you're ready:
Click "Send email now to X people" OR
Click Schedule to send later (**time zone is D.C. Time, EST**).

Your email statistics

After you've sent your email, you can check how well it has been received, bounce statistics, clicked on, etc.

1. In Communications, go back to your Broadcaster's general Email list.
2. Click Dashboard and click on the Slug to open the details
3. Click the individual hyperlinks under each section to see who opened the file, what links were clicked, whose email bounced and so on.

Communication >
DA Helpdesk

New email blast

Email: helpdesk@democratsabroad.org · 203 email blasts · Today's Training: IT Admin Database, mail
Text: none · Add text messaging
Twitter: none · Connect Twitter account
Facebook: none · Connect Facebook page

Dashboard Email Settings

+ New blast Blasts Scheduled

Author	Name	Sent	Opened	Clicked	Donated
Susan Penrod	IT Admin Training 23072019	2	2 (100.00%)	1 (50.00%)	0

Broadcasters > DA Helpdesk > Emails >

wheres_wally_july_16_2019

Dashboard Settings Files 1 Theme Content Recipients Review and send

6 sent	83.33% 5 opened	66.67% 4 clicked	\$0.00 0 donated	0.00% 0 bounced	0.00% 0 bad	0.00% 0 spam reported	0.00% 0 unsubscribed
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When to contact a global admin



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

- Have forgotten your info-* login password – **do not try to change it yourself!**
- Need a data extract (Excel spreadsheet)
- Need a data re-import to update information (must be based on an initial export since we 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: <https://wiki.democratsabroad.org/display/ZORA/New+Admin+Access+Request+Form>