

# DA Country Committee Email Blasts

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ESSENTIAL UPDATE: MARCH 2021

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# Rules for the emailing admin login

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- 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.

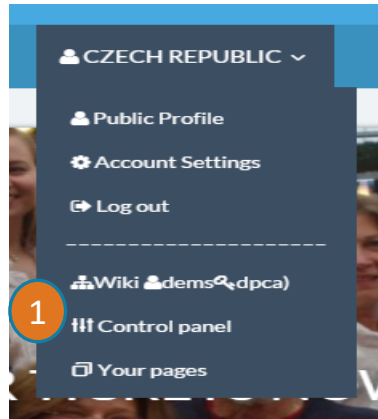
# Broadcaster – What's that?

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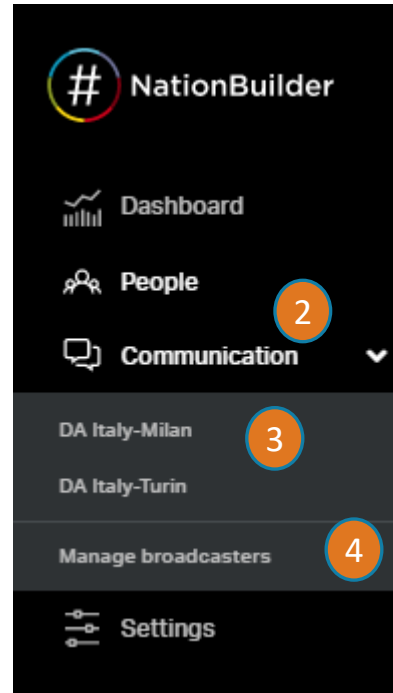
- Each DA country, chapter, etc. group or subject group has a “broadcaster” linked to its address. All our external email communications are organized around broadcasters.
- A broadcaster can send messages using various different ***sender names***, but it will always use the same ***email address***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

# How to Access your Broadcaster

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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

**Email:** Info-Italy@democratsabroad.org · 220 email blasts · AZ, GA, NC, NV voters please help: check your ballot TODAY! 10 days ago

**Text:** none · Add text messaging

**Twitter:** none · Connect Twitter account

**Facebook:** none · Connect Facebook page

Dashboard Email Texting Settings

**New email blast**

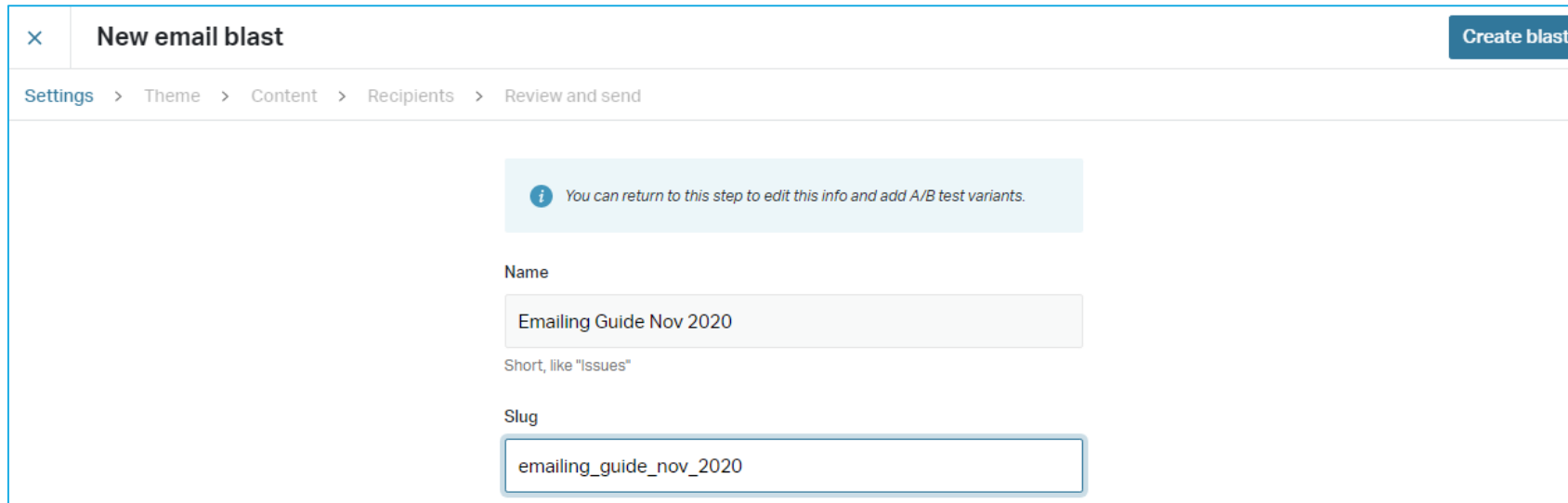
Activity for All time

Italy started a new email blast from DA Italy

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.”

# Settings: Giving a Name and ID (“slug”) to your new blast



The screenshot shows a web interface for creating a new email blast. At the top, there's a tab labeled 'New email blast' with a close button (x) on the left and a 'Create blast' button on the right. Below the tab is a breadcrumb trail: 'Settings > Theme > Content > Recipients > Review and send'. A light blue information box contains the text: 'You can return to this step to edit this info and add A/B test variants.' Below this, there are two input fields. The first is labeled 'Name' and contains the text 'Emailing Guide Nov 2020'. Below the name field is a smaller text label: 'Short, like "Issues"'. The second input field is labeled 'Slug' and contains the text 'emailing\_guide\_nov\_2020'.

## 1. NAME and AUTOMATIC SLUG

- Give your new blast a short but clear name to identify it. (Note: this does not appear anywhere on the email)
- Click in the “Slug” field to automatically generate the unique document identifier (a required document identifier that does not appear on the delivered emails). The slug can be edited if needed to make it shorter (30 character limit) or render it unique.

**IMPORTANT NOTE: One recent change** is that when creating an email blast you must move from one tab (step) to the next, and in the following tabs (steps) click **“Save and Continue”** in the upper right to move on.

# Settings: From name, Subject line and Cloning

The screenshot shows two input fields. The first is labeled 'From' and contains the text 'DA Italy' with a small email address '<Info-Italy@democratsabroad.org>' below it. To the right of the 'From' field is a '+ Add variant' link. The second field is labeled 'Subject' and contains the text 'Subject line for my email', also with a '+ Add variant' link to its right. Below these fields is a 'Preview text' label and an empty input field.

This section shows a descriptive text: 'Increases conversion rate, but is confusing if they forward the email since the original recipient's email address will appear in the form'. Below this is a label 'Clone from previous blast' and a dropdown menu with the word 'Select' and a downward arrow.

2. **New -> From: Now on the settings tab (not the content tab).** You can change the sender name to personalize your message, and also test with variants.

**New -> Subject line field is also on this settings tab (no longer on content tab)**

You can always return to this Settings tab to edit the Subject line if you want. Here is where you can add variants to test.

**Preview text** This option is presently not used in our templates, so simply ignore.

3. **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.

When finished, you must click **Create blast** at the top of the screen to move to the next tab (step).

Create blast



# Theme: Choose a Theme

× Emailing Guide NOV 2020-2 DRAFT less than a minute ago Save and continue

Settings > Theme > Content > Recipients > Review and send

Stock themes Custom themes **1**

Name	Creator	Owner nation	Shared with	Status	Updated	
<b>DA Basic with Logo (current)</b>	Julia Bryan	democratsabroad		<span>PUBLISHED</span>	11 days ago	
DA No Logo White	Julia Bryan	democratsabroad		<span>PUBLISHED</span>	11 days ago	switch to
DA Blue with Logo	Julia Bryan	democratsabroad		<span>PUBLISHED</span>	11 days ago	switch to

**2**

Once you've chosen your theme, click **Save and continue** to move to the next tab, or Click **x** in the upper left to return to the Dashboard.

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 three).
2. To choose a different 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.**

# The Content tab – where it all comes together

Emailing Guide NOV 2020-2 **DRAFT** 8 minutes ago Save and continue

Settings > Theme > **Content** > Recipients > Review and send

Desktop Mobile Text Manage files Send test email

**DEMOCRATS ABROAD**

Friend --  
DA Italy

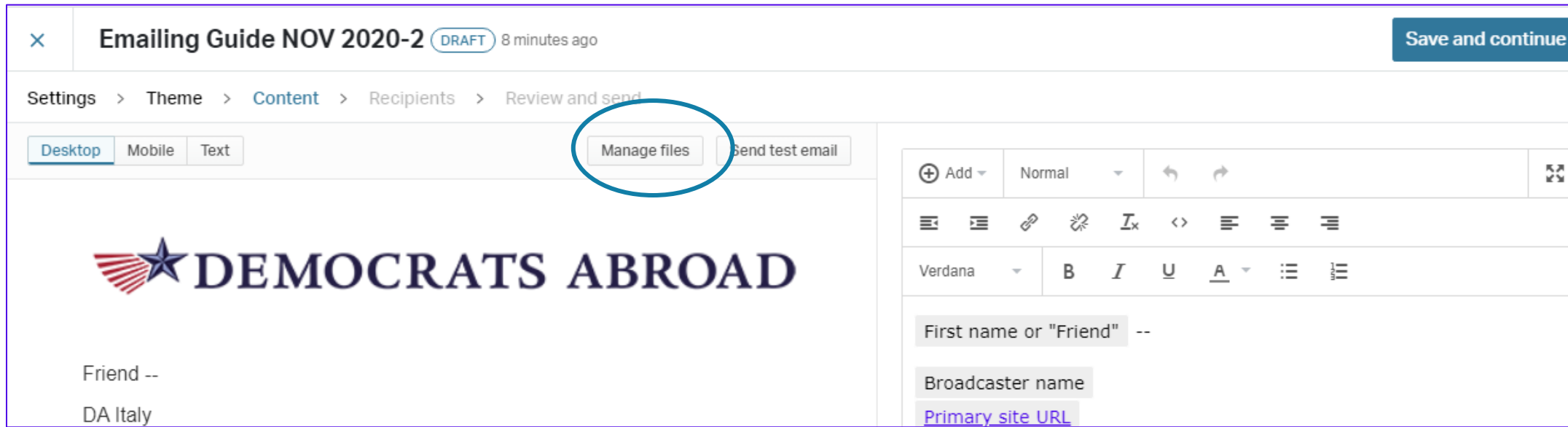
First name or "Friend" --  
Broadcaster name  
[Primary site URL](#)

We will review the various parts of this tab in the pages that follow, but here are a few main features:

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 click the button again to collapse the screen.
3. Click the **Save and update preview** (at the bottom of the page) to review your message.
4. To **change the Sender name or Subject line**, return to the Settings after clicking Save and update.

**Save and update preview**

# The Email Content Editor - Components of an email blast



**Manage files:** You can now add files to hyperlink without having to leave the Content tab: Right click and copy the file link for pdfs and docs, then use the hyperlink button in the content editor.

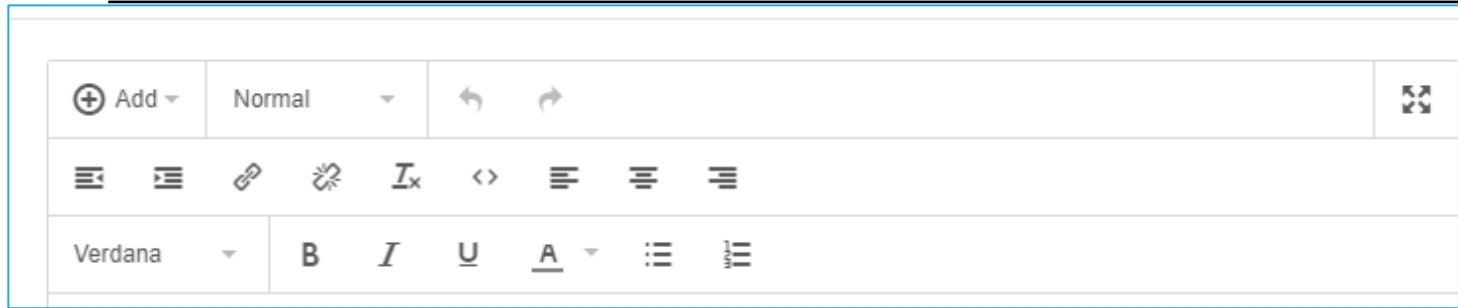
**Content box:** The next pages will explain how to enter and format content, adding images and file hyperlinks. The template already includes a “first name” and broadcaster token. For spam-filter reasons your message should be written out in the box, not saved in a page-size jpg poster.

Once you’ve finished your text, click (step) (see [slide 20](#)).

Save and update preview

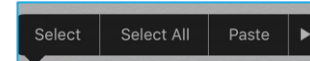
Click **Save and continue** to move to the recipients tab

# Entering content - general



**You can obviously type directly in the content box, but it's easier to paste in formatted text.**

- **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.

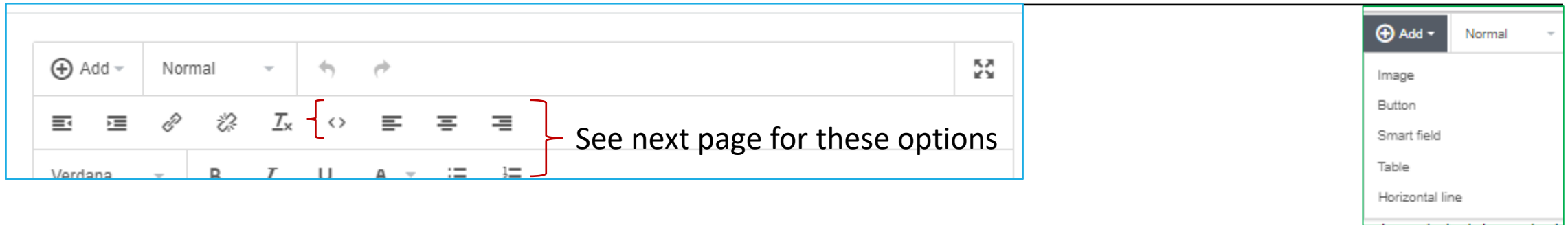
- Don't spend a lot of time in Word, formatting **numbered lists**. Do this in NB - in many cases it's easier to simply type a number in front of your paragraph.

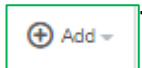
**TIP:** To keep a consistent **line spacing**, it's helpful in your Word file to replace the paragraph mark (^p) with a manual line break ^l (circumflex lower case l). You'll need to retain the paragraph mark though if you want special formatting for a paragraph.

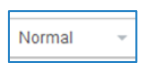
**HTML coding** – you can enter, paste, change or copy the source code by pressing the <> icon.

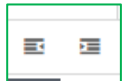
**TIP:** HTML experts will find it easier to fix the line spacing by substituting some <p> with <br>

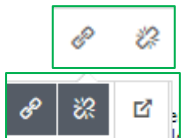
# The new Email editor – Formatting 1




 This button groups several advanced options, described on [slides 14-17](#).

 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.

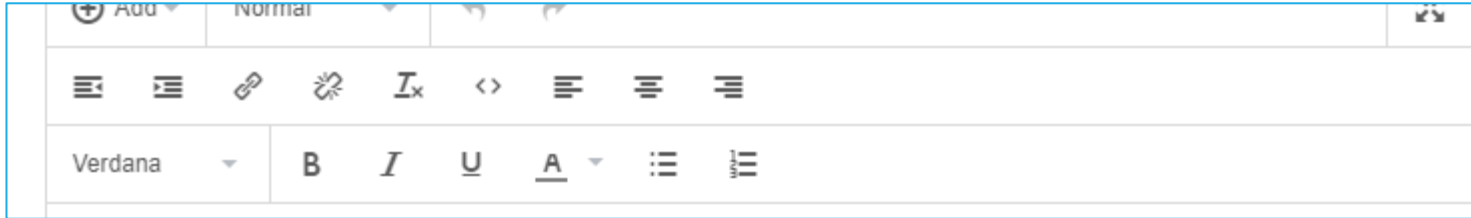
 **Indents:** This option has been slightly improved and functions like a normal paragraph indent command.

 **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).

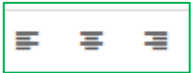
 The **Remove Formatting** function may come in handy to start from scratch if the formatting you had set doesn't look like you had expected.

# The new Email editor – Formatting 2

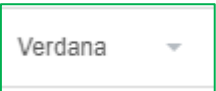
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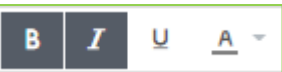
The **Source code** icon is used to insert, copy and edit HTML code. It can be helpful when you want use your email as the basis of a web posting.



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



**New!** You can now set the font for the whole text or certain sections. The font changes might not appear in all email platforms, however.



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

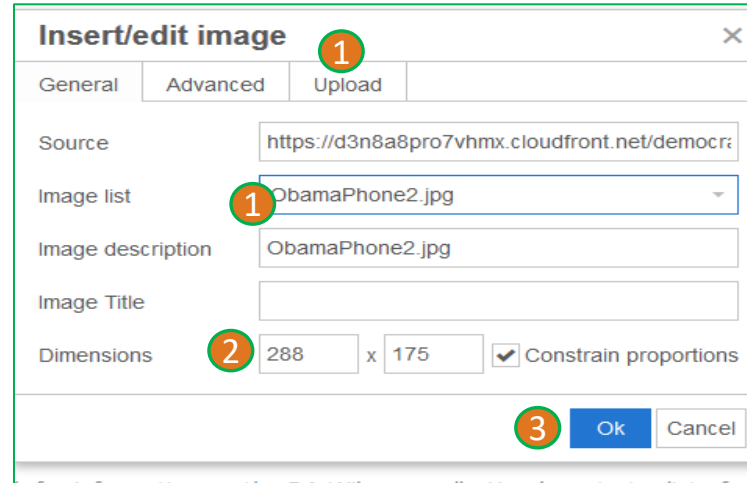
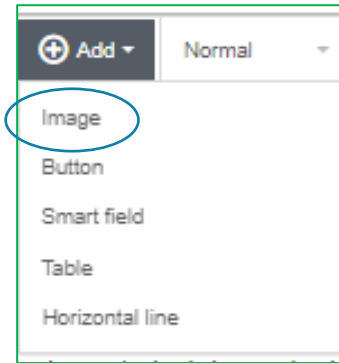


Like any Numbered List or Bullet List, these formatting options take a bit of time to figure out. It's often best to add these here in NationBuilder rather than trying to get numbering set in word processing to work.

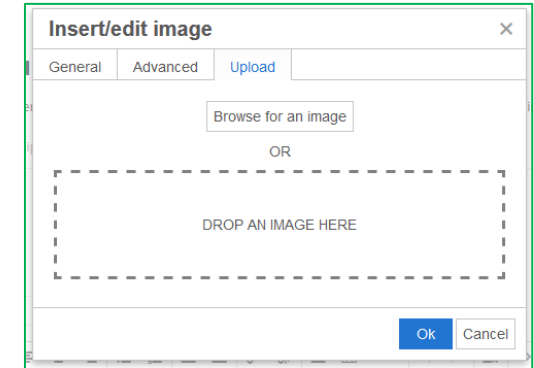


And what would we do without our friends UNDO and REDO!!

# The new Email editor – Add menu: Adding an Image

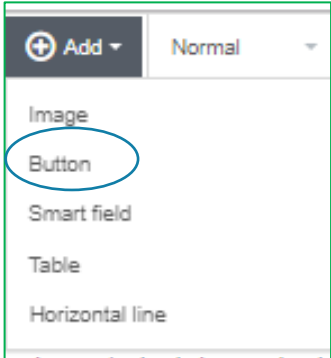


Browse screen after clicking upload →



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 10](#)). 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 menu: 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

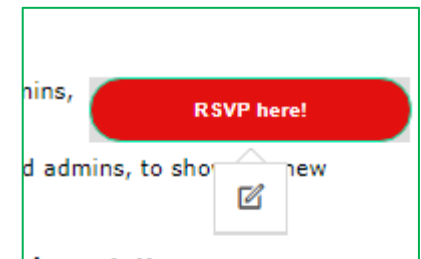
**Colors: Text, Background, and Border:** click the colored box on the right to choose your color

**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

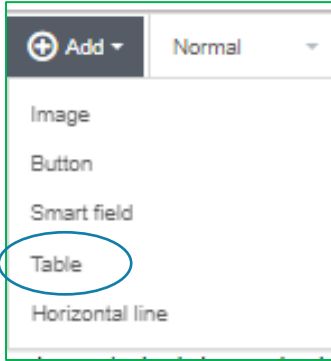
**To re-edit,** click on the button and a tiny Edit icon will appear

Button text	<input type="text" value="RSVP here!"/>
Button URL	<input type="text" value="https://www.democratsabroad.org/"/>
Text color	<input type="text" value="#ffffff"/> <input type="checkbox"/>
Background color	<input type="text" value="#e31010"/> <input checked="" type="checkbox"/>
Button width	<input type="text" value="200"/> px
Border radius	<input type="text" value="4"/> px
Border color	<input type="text" value="#ffffff"/> <input type="checkbox"/>



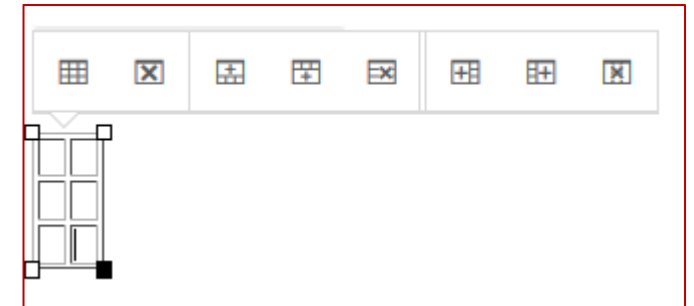


# The new Email editor – Add menu: A simple way to add a table

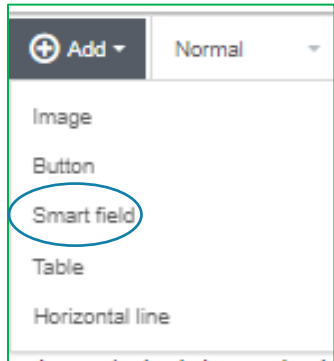


Tables can be interesting for various things – regular table purposes or else to align small images with text. It's best to take some time to play around.

- 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.



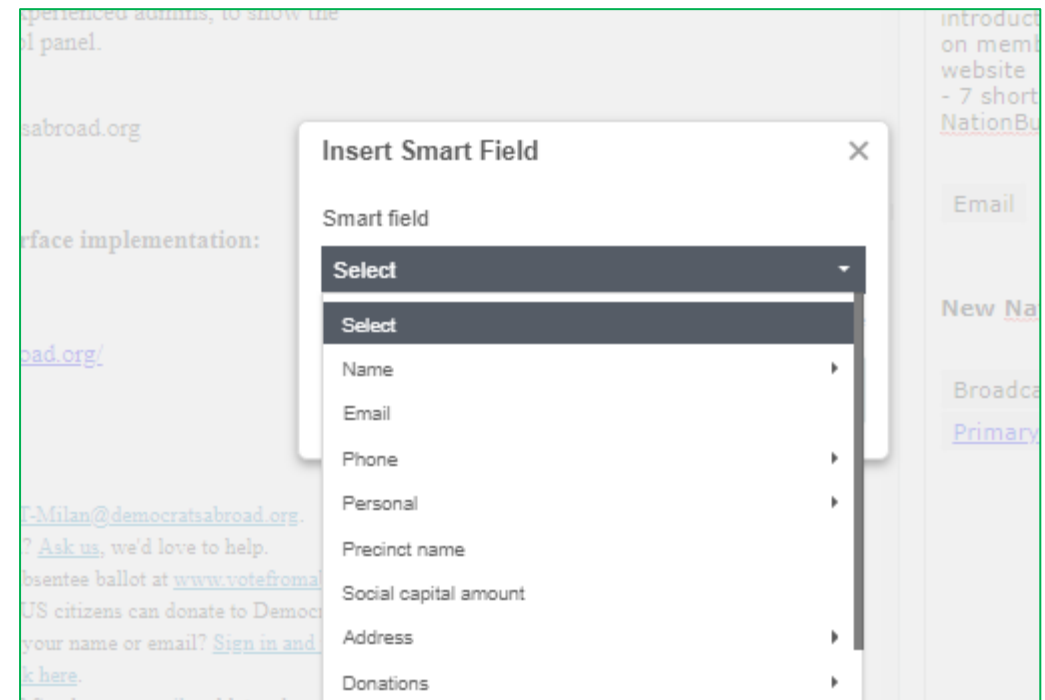
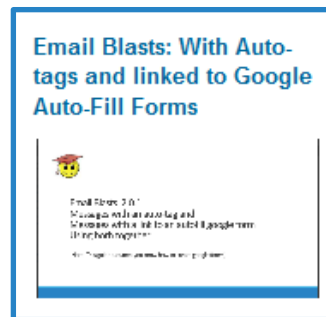
# The new Email editor – Add menu: Adding a Smart Field



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

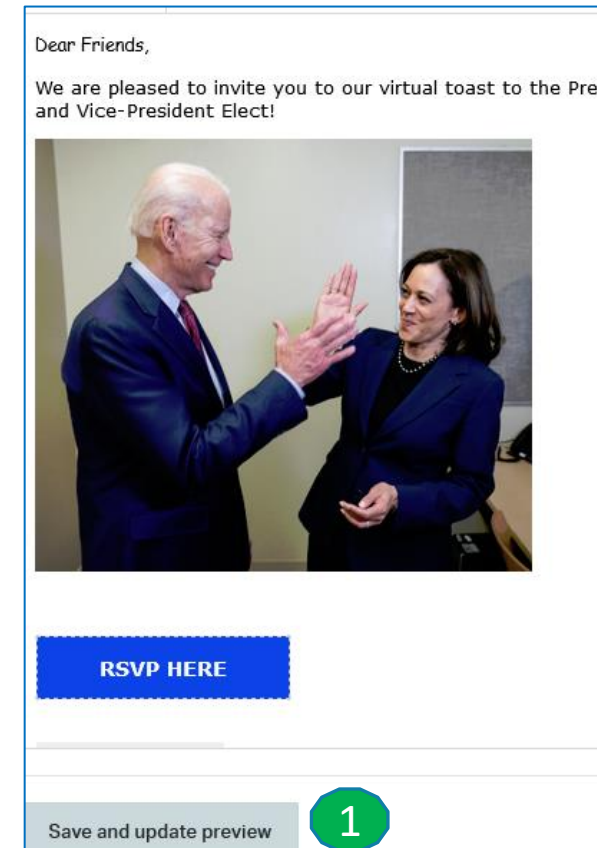
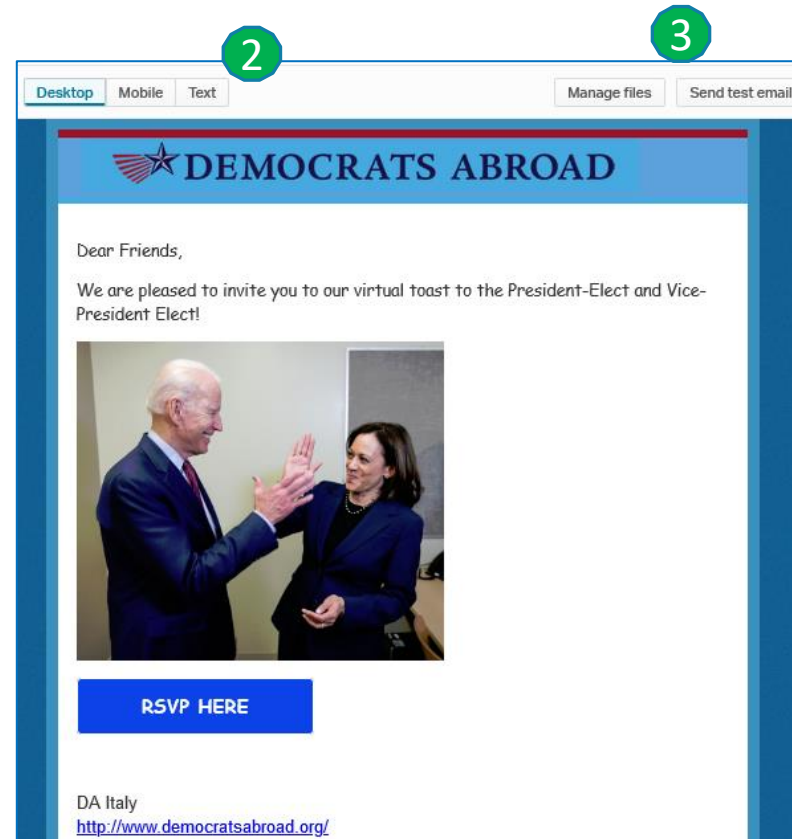
NationBuilder proposes a limited number of Smart fields, from the member recipient's record, that can be inserted in an email. Not all are relevant for our work, but some may be helpful for membership clean-up campaigns.

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. Click **Save and update preview**, to save your text. You can adjust the size of the 2 screens as shown on [Slide 9](#) to view and edit.
2. You can **Desktop** or **Mobile** preview 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 box. It's especially important to make sure all links work and that line spacing looks ok.
4. Once you're ready to move on to the next tabs, click **Save and Continue** at the top of the screen, or else **x** in the upper left to close and return to the Dashboard.



✕ Emailing Guide NOV 2020-2 **DRAFT** less than a minute ago

4  
Save and continue

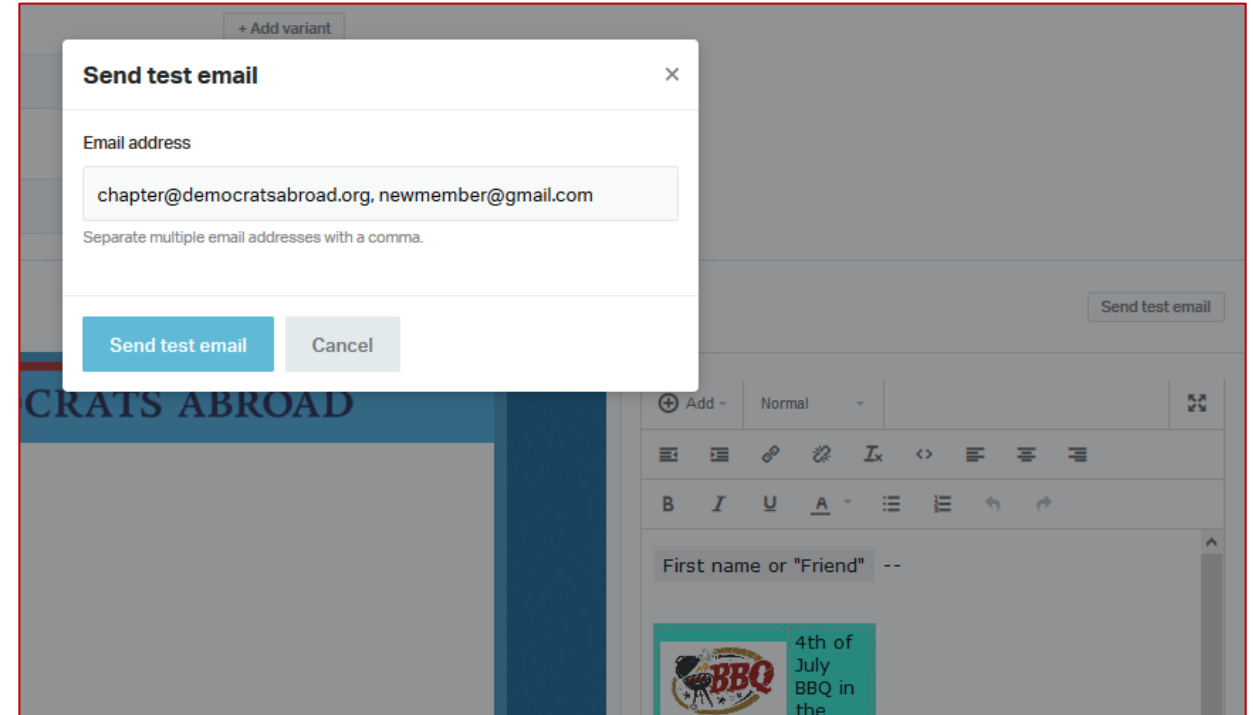
# The many uses of a test email

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Send to one or several addresses, separated with a comma.

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. The only slight drawback is that the subject line of a test email always contains the word [TEST], so you should warn the person who will be receiving it, to avoid confusion.



# Recipients tab

4 Save and continue

## Choose recipients

1

Supporters Prospects

On list

2

With tag(s)

In filter

× Receive Local Emails ▾

All 

3

Update recipients

There are important changes now in the choice of recipients so please read this slide and the next very carefully!

1. **Supporters:** this is the default – no need to touch
2. **Matching:**  
**On list** = static lists (“snapshots”) created in membership  
**With tags** = members with a particular tag or set of tags  
**In filter** = meeting the criteria of a saved (dynamic) set of criteria  
**All** = ***You should no longer use this option.*** –See details on the next slide.
3. FIRST Click “Update recipients” to save and see your recipients on the left
4. THEN Click “**Save and Continue**” to move to the final tab (step).

**Contact the [Helpdesk](#) for more information about recipients and the required filters (see next page).**

# Recipient Filters for “Partial Opt-outs”

**You should no longer send to ALL, but use a special filter.**

We have introduced more fine-tuned possibilities for members to opt-out of certain types of emails (you can see this for yourself if you click the link in the opt-out sentence of the email footer, or open the email preferences in your own account).

We have created filters and updated some existing ones so you won't have to worry about the new tags for most of your emails.

**Country and Chapter Admins:** Use **Filter** “Receive Local Emails” to email your members.

***If you are sending to a subset of your members:*** in your list or filter, make sure you've excluded people with the **Tag** “Opt out: local news events” (filter criteria: tag/none of/)

**For GOTV emails:** Please use **Filter** “Receive Voter Alerts”.

**For Fundraising emails:** Please use **Filter** “Receive Fundraising Emails”.

**For Caucus emails:** No change, just send to your caucus group. We hope this change will also help grow your membership.

The screenshot shows a web interface for selecting recipients. At the top right is a button labeled "Save and co". Below it is a section titled "Choose recipients". A message box states "Mailings must be sent to at least one person." There are two tabs: "Supporters" (selected) and "Prospects". Below the tabs are four radio button options: "On list", "With tag(s)", "In filter", and "All". The "All" option is accompanied by a red circle with a diagonal line through it, indicating it is disabled or restricted.

# 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 tab 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 or EDT**).

# 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.

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

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

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Contact the Global Admin mailbox [helpdesk@democratsabroad.org](mailto: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