DA Country Committee Email Blasts

BY THE GLOBAL HELPDESK TEAM
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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, caucus, committee, etc. 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. Log in as your country/chapter, with the info-... address and password that were assigned to you. If you're logged in and on the DA website, open your tool bar and open your tool bar & click "Control panel" to access your main Dashboard.
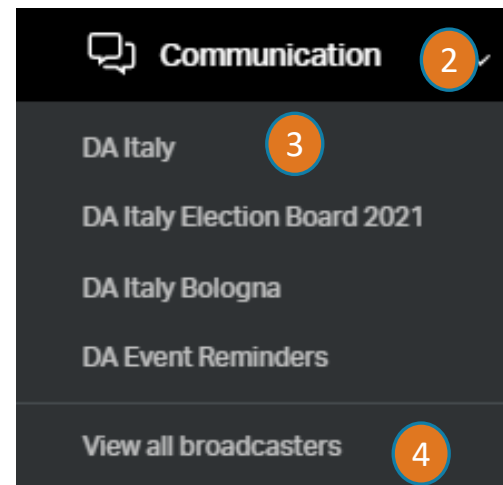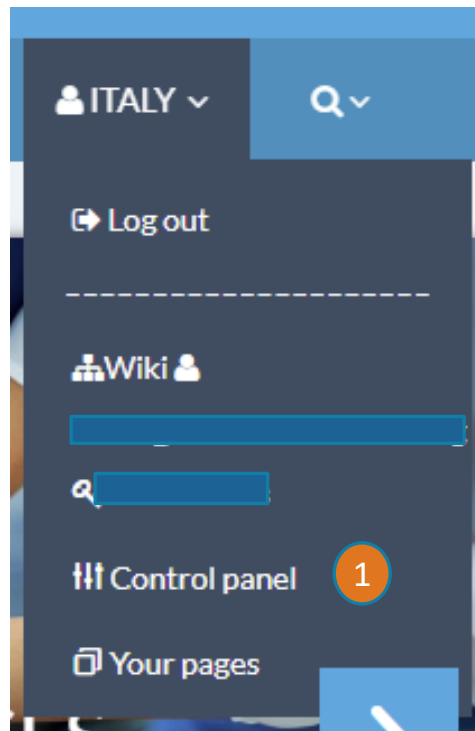
2. Click "Communication" to view broadcaster list.

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
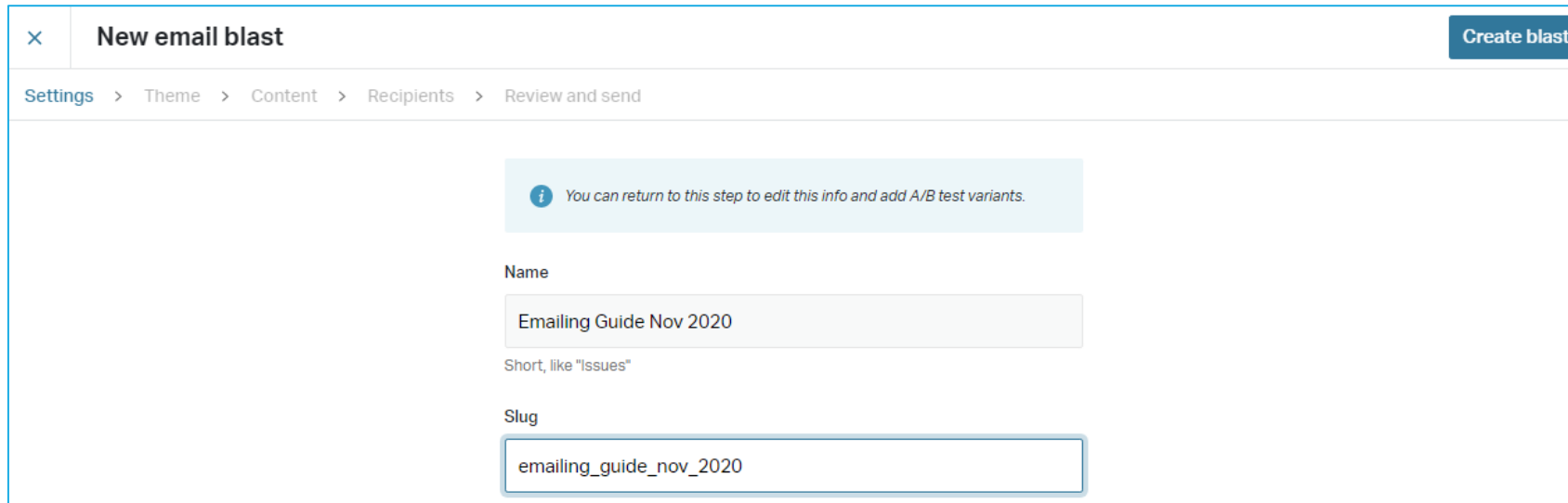
1. When you open your broadcaster window you can Start a new email blast by clicking "New Email blast" at the top.

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

1. NAME and AUTOMATIC SLUG

- Give your new blast a short but clear and unique 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: When creating an email blast you must move from one tab (step) to the next. Click "Save and Continue" in the upper right to move on to the next step.

Settings: From name, Subject line and Cloning

2. **From: (*no longer on the content tab*)**. You can change the sender's name to personalize your message, and also test with variants.

   Subject line: (*no longer on content tab*)
   You can always return to this Settings tab to edit the Subject line if you want.
   You can also test the effectiveness of a Sender name or Subject line by adding variants.

   Preview text – We intend to implement this option shortly.

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).

Theme: Choose a Theme

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

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.

The Email Content Editor - Components of an email blast
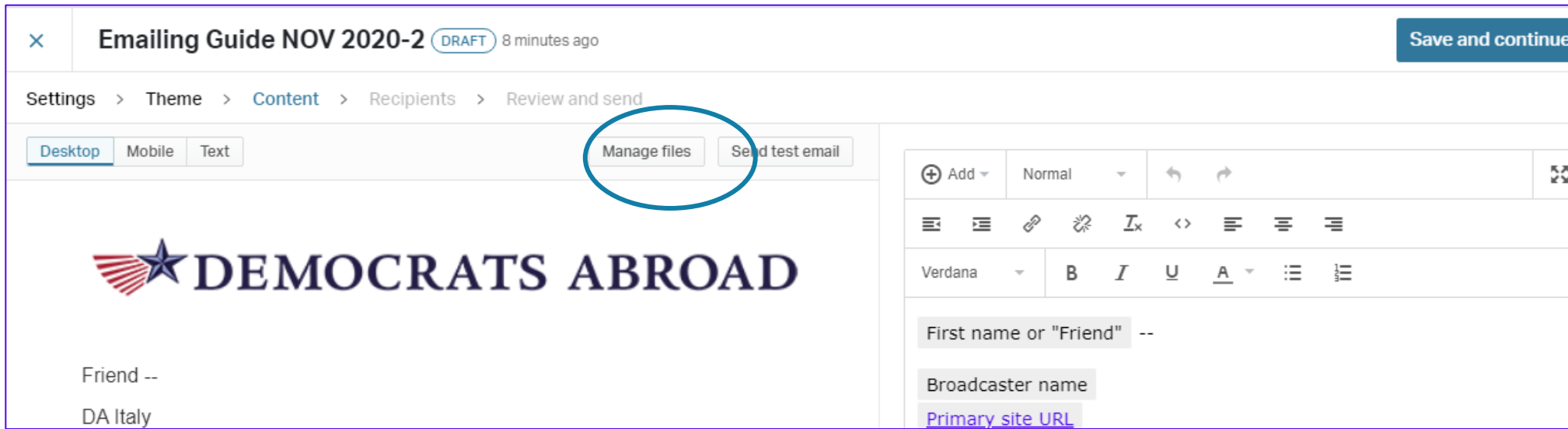
Manage files: You can now add files to hyperlink without having to leave the Content tab. After uploading the file, right click and copy the file link for pdfs and docs, then use the hyperlink button in the content editor.

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.
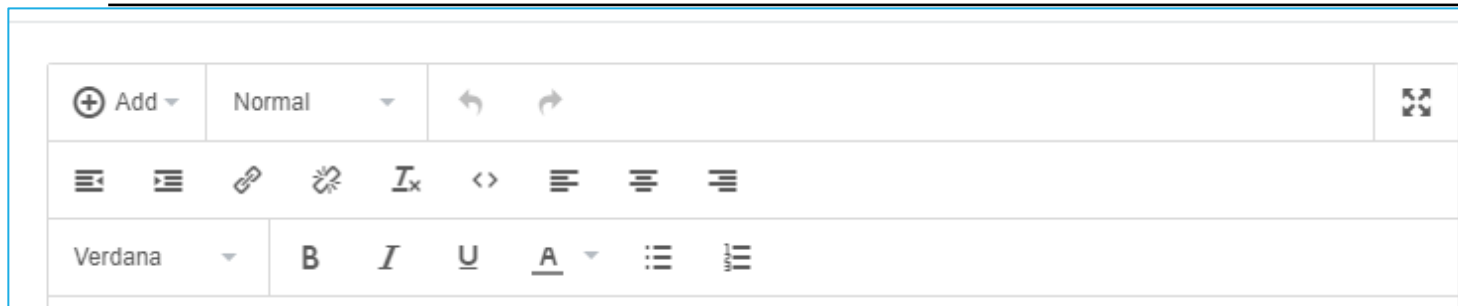
Once you've finished your text, click **Save and update preview**   **Click** **Save and continue** **to move to the recipients tab (step) (see slide 20).**
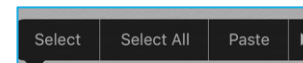
Entering content - general

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.
- Set up any **numbered lists** in the content box or simply type a number in front of your paragraph if it's easier.

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.
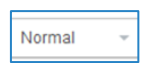
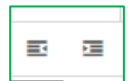**HTML coding** – you can enter, paste, change or copy the source code by pressing the <> icon.
TIP: HTML experts will find it easier to fix the line spacing by substituting some <p> with

The new Email editor – Formatting 1

See next page for these options
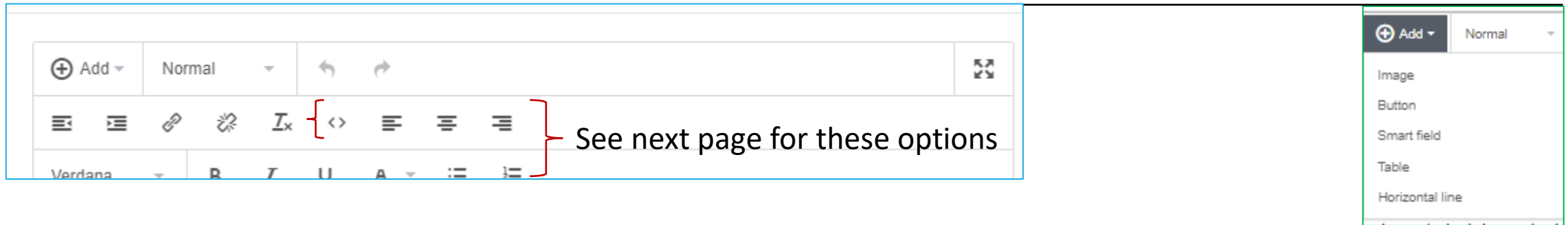
⊕ Add ▾ — This button groups several advanced options, described on slides 14-17.

Normal ▾ — To change **font <u>size</u>** 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).
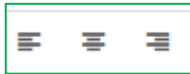
The **Remove Formatting** function may come in handy to start from scratch if the formatting you had set doesn't look like you had expected.
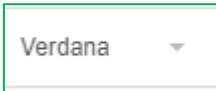
The new Email editor – Formatting 2
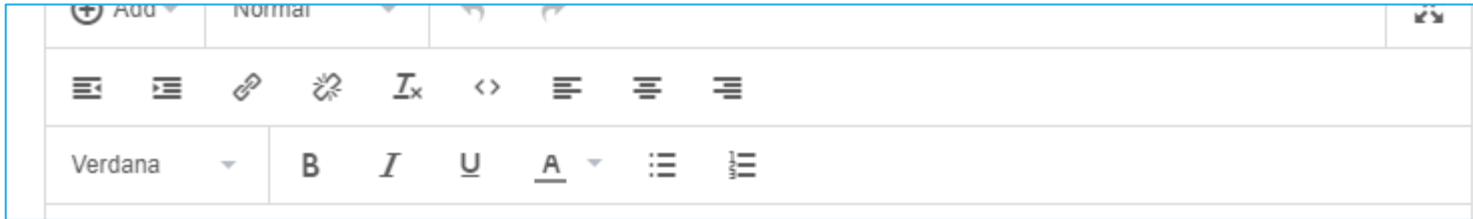
The **Source code** icon is used to insert, copy and edit HTML code. It can be helpful when you want use your email as the basis of a web posting.

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

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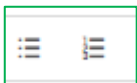
Like any Numbered List or Bullet List, these formatting options take a bit of time to figure out. It's often best to add these here in NationBuilder rather than trying to get numbering set in word processing to work.

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

The new Email editor – Add Menu: Inserting an Image -1

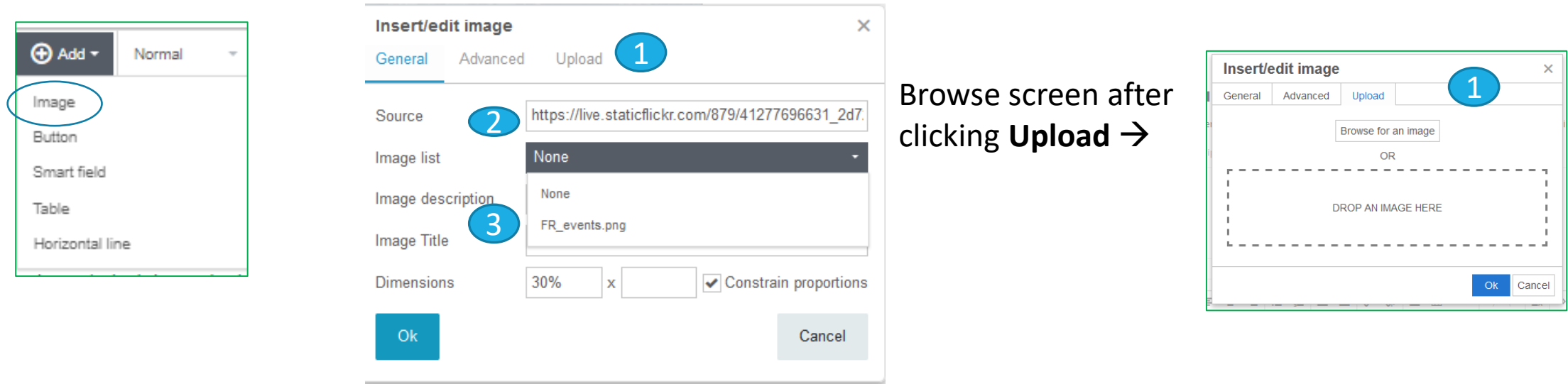Browse screen after clicking **Upload** →

Use the image icon on the text editor to insert an image (jpg or png) in the message screen.
There are 3 different ways to Insert an image:

1. You can upload an image directly from your PC using the **Upload** Button

2. You can paste the URL of an *public domain image* in the **Source** field

3. You can click the **Image List** to select a graphic file that you've already uploaded via Manage Files (see slide 10)

The new Email editor – Add Menu: Editing the Image - 2
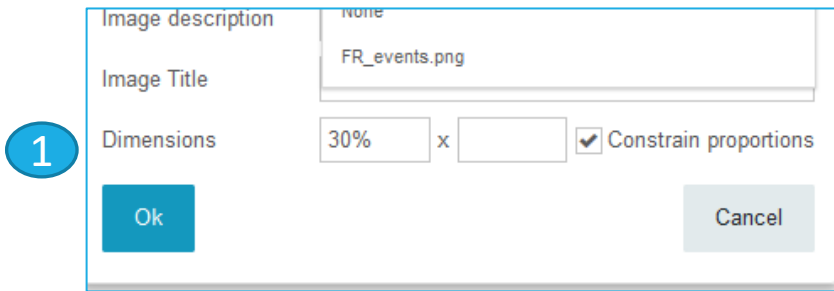
1. To change the image **Dimensions**, enter a % in the first box, and leave the second one empty. This will resize your image to that percent of any screen, and ensures that it displays well on any device.
If the image is still too large or small, return to this box to adjust the %.
Do not move the image's corner marks to adjust the size because that will 'freeze' it so it cannot adapt to all devices.
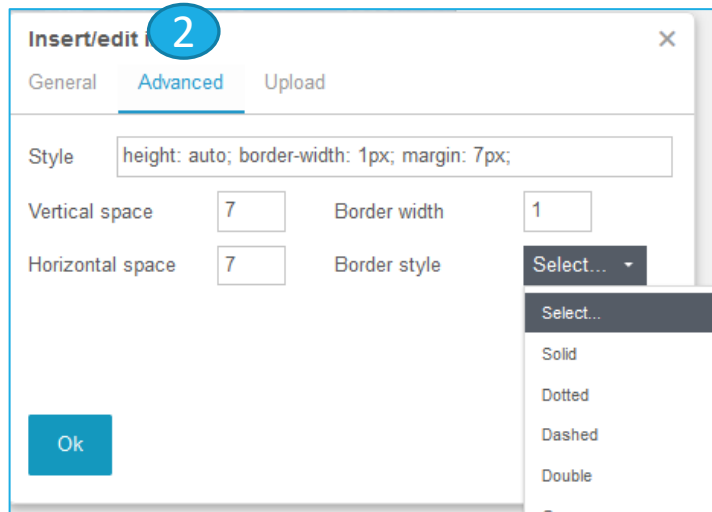
2. Open Advanced settings to add a border around the image, or to adjust horizontal and vertical spacing (i.e. the space between your text and the image).
To position the image use the alignment icons in the message taskbar.
Left and right justified can be used to position your image next to your text.

Remember that the ratio between the image size and text can affect whether an email program considers a message as spam or as safe. In other words, don't insert an enormous image, with just one teeny line of text.

The new Email editor – Add Menu: Adding a Button
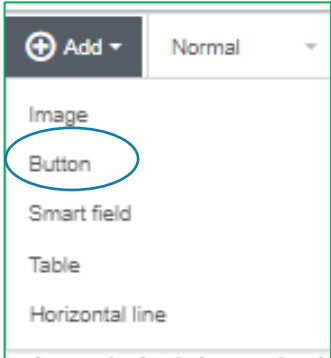
Buttons are great for grabbing your readers' attention – to get them to RSVP, volunteer or confirm their membership.

Button text: the message readers will see

Button URL: where clicking will send them to

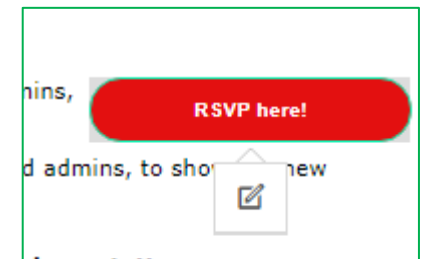**Colors: Text, Background, and Border:** click the colored box on the right to choose your color

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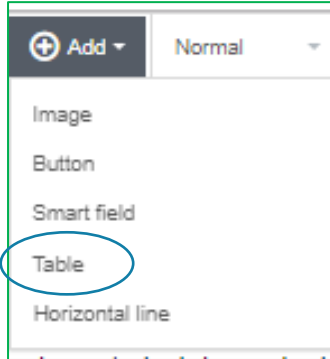
To re-edit, click on the button and a tiny Edit icon will appear

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.

- To help you see what you're working with, 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.
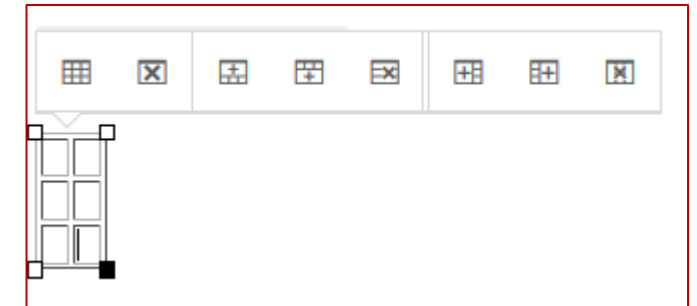
The new Email editor – Add Menu: Adding a Smart Field
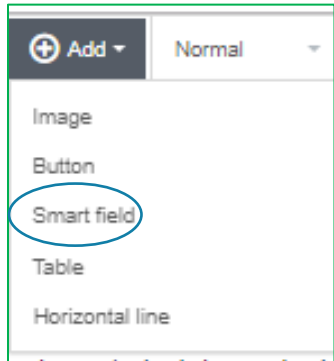
NationBuilder proposes a limited number of Smart fields, from the member recipient's record, that can be inserted in an email. Not all are relevant for our work, but some may be helpful for membership clean-up campaigns or member surveys.

Experienced emailers can also consult a guide on how to add a more customized set of smart fields to their messages.
Click on the image to the right ->

Email Blasts: With Auto-tags and linked to Google Auto-Fill Forms

Insert Smart Field

Smart field

Select

Select
Name
Email
Phone
Personal
Precinct name
Social capital amount
Address
Donations
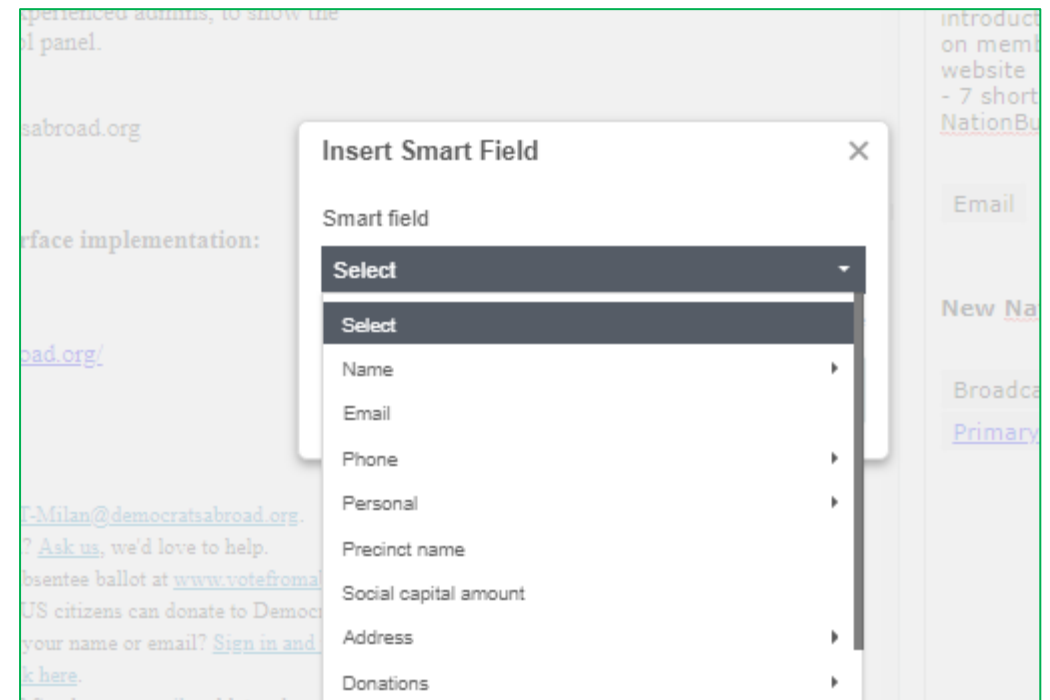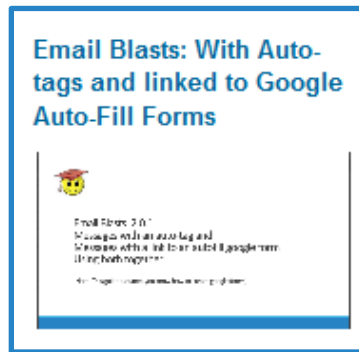
Saving your email - first Preview and Test Email

1. Click **Save and update preview**, to save your text. You can adjust the size of the 2 screens as shown on <u>Slide 9</u> 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.
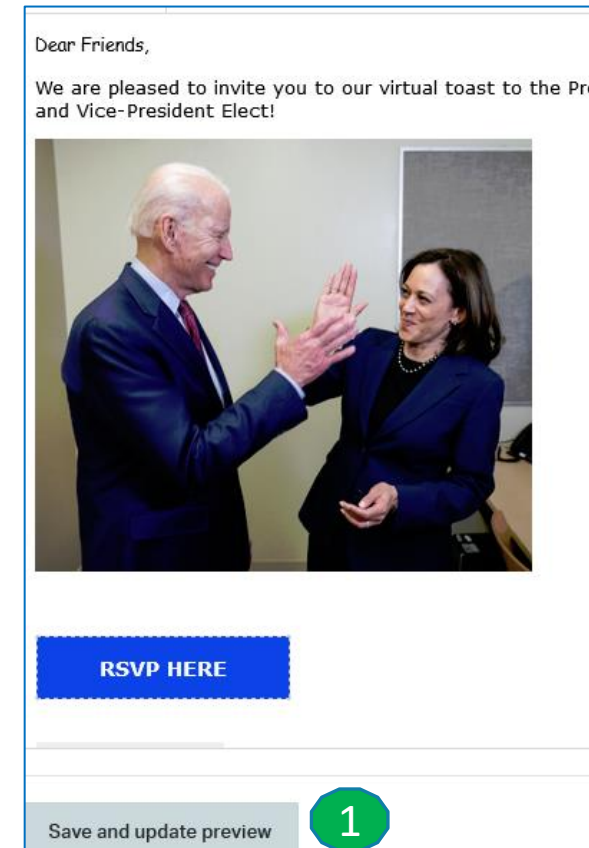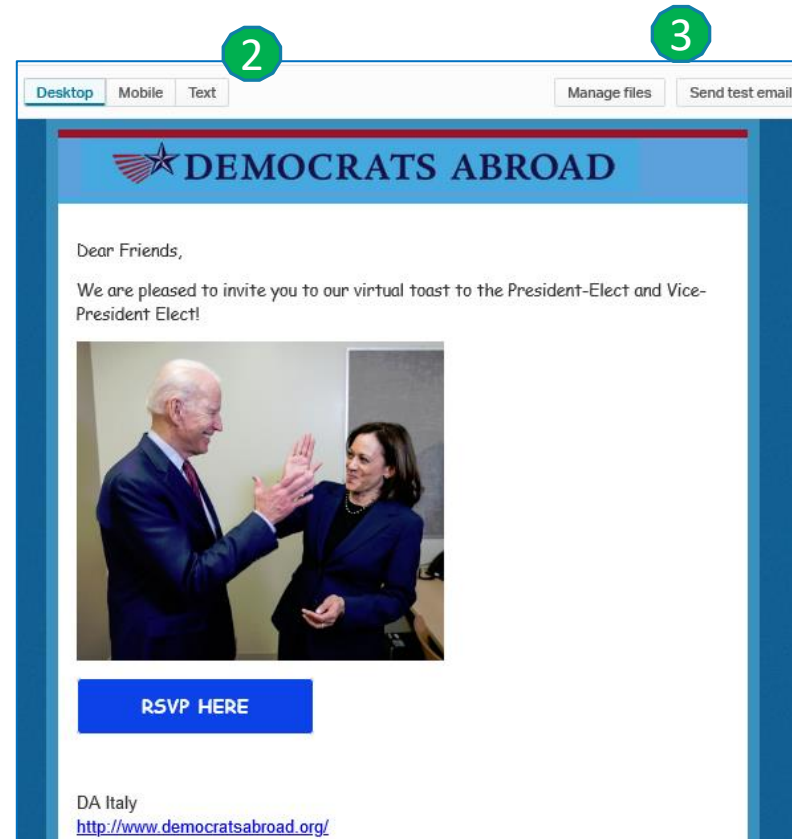
The many uses of a test email

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]. Thus, to avoid confusion you should warn the person who will be receiving it,.
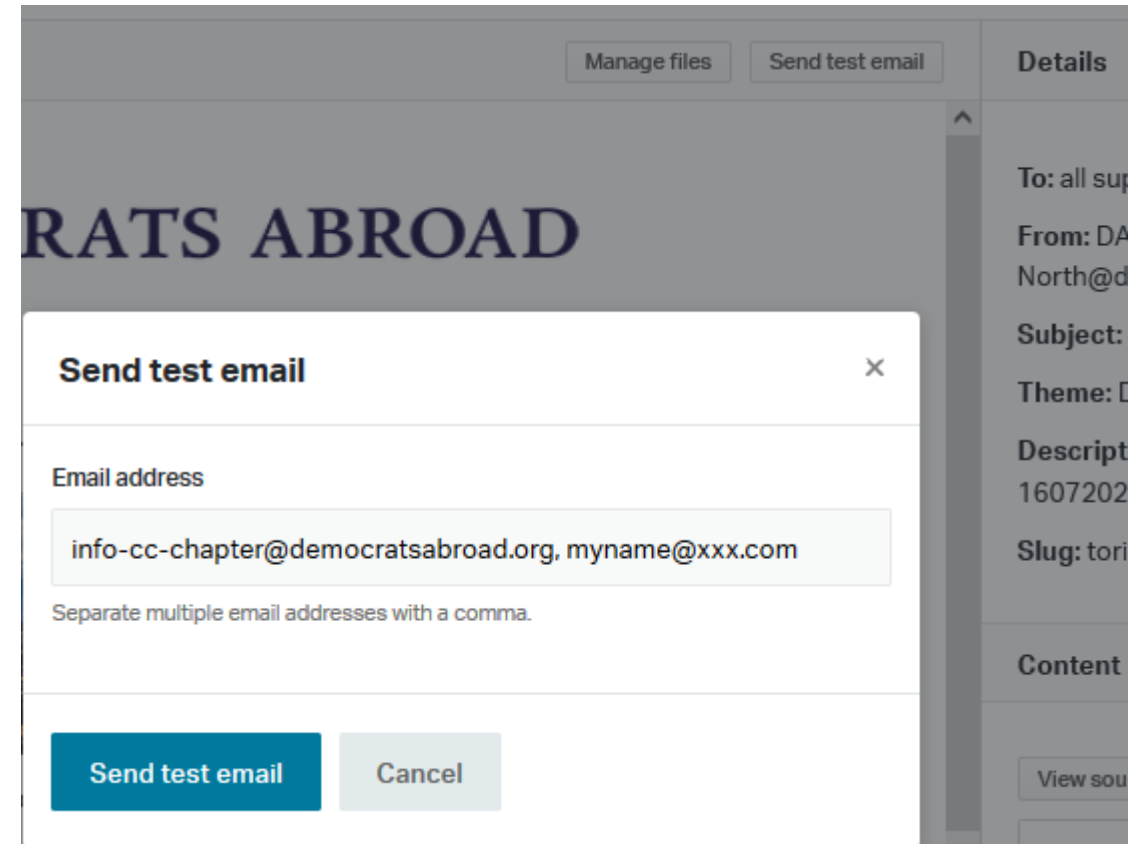
Recipients tab

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. **You can choose recipients who are:**

   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 slides.

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).

Recipients: Never send to ALL 👽

Members now have more fine-tuned possibilities to opt-out of certain types of emails (you can see this for yourself if you 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. Please do not rename it or create your own national copy. This filter will work for your chapter or your country without any changes

If you are sending to a <u>subset</u> 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.

Save and co

Choose recipients

Mailings must be sent to at least one person.

Supporters | Prospects

◯ On list

◯ With tag(s)

◯ In filter

⊖ All

Download a short reminder sheet here.

Recipient Filters – Building a more targeted filter

On the people (membership) view:

1. Look for the Saved Filter "Receive Local Emails", then click the funnel to see the criteria.

2. **ADD** your other requirements. For example, for emails to your members about taxation events, add the criteria as shown to the right:
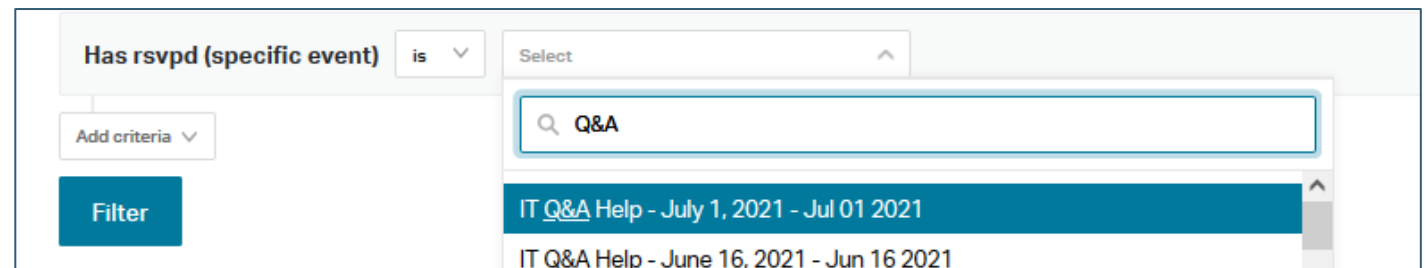To find other opt-out criteria tags, start typing: **Opt out:**

with none ∨	of the following Tags (multiple)	Opt out: Taxation emails ✕
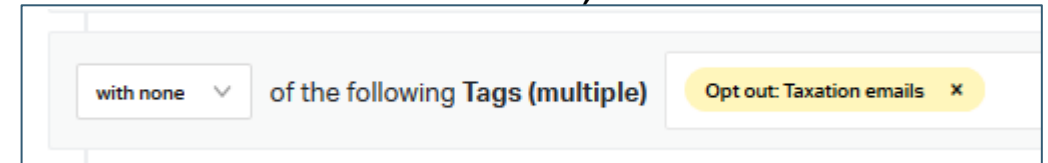
3.Use **Save Filter As** to **SAVE** your adapted filter with a name like "CC-ISSUE-Email" ("FI-Taxation-Email"). Be careful to use 'Save Filter As', and not 'Save Filter', which would change the filter for everyone.

EVENT REMINDERS AND LINKS:
Filter for people who have RSVP'd to an event as shown below. *Save the filter* to use in the broadcaster. As the filter is dynamic, it will contain people who have RSVP'd up to the last minute before sending, so you can easily schedule an email. For more global events create a reminder using the Event Reminders Broadcaster and inform the Helpdesk

==See the mini-guide on RSVPs==
==for full information==

Has rsvpd (specific event)	is ∨	Select ∧
Add criteria ∨		🔍 Q&A
Filter		IT Q&A Help - July 1, 2021 - Jul 01 2021
		IT Q&A Help - June 16, 2021 - Jun 16 2021

Review and Send your Email Blast

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 Email and click on the Name 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.

DA Helpdesk

Email: helpdesk@democratsabroad.org · 335 e
Text: none · Add text messaging
Twitter: none · Connect Twitter account
Facebook: none · Connect Facebook page

Dashboard   Email   Texting   Settings

Blasts   Scheduled   Custom themes

Author   Name

K̄   Email Opt Out How to for
F   Admins

Email Opt Out How to for Admins (SENT) Jun 11, 2021

Sent from DA Helpdesk to 325 supporters with tags Cert-Email,Cert-Memb

hboard   Recipients   View sent email

| 325 sent | 81.23% opened | 37.85% clicked | $0.00 0 donated | 0.00% bounced | 0.00% bad | 0.00% reported spam |

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!

• Wish to request an event RSVP autoresponse or have us send a scheduled Event Reminder

• 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