DA Committee
Membership & Email Management

MARCH 2023

Contents of this Guide

The database structure

- A cascade or hierarchy structure where each 'organization' (region, country, chapter group) is a 'point person' for all those downstream.

- The membership/email admin is assigned one of four logins allowed for each country or chapter. They use this login, rather than their own personal one to work in the database/emailing.

How to login

Go to www.democratsabroad.org

1. Click "Sign in with email, fb, or twitter".
2. Once on the "Sign In" page, find "Sign in with Email".
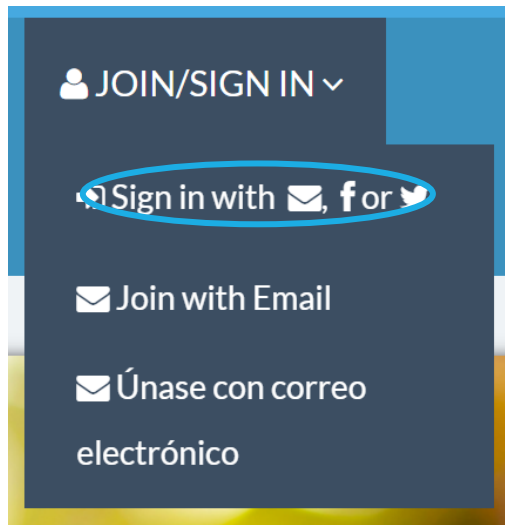3. Fill in the username and password and click "Sign in with email".
    Username = your organization login
    Password = password assigned to you

① JOIN/SIGN IN ﹀

Sign in with ✉, f or 🐦

✉ Join with Email

✉ Únase con correo electrónico

② SIGN IN WITH EMAIL

Email Address

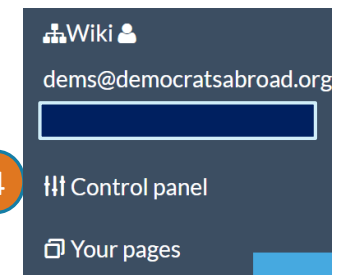Info-Czech-Republic@democratsabroad.org ③

Password

•••••••••••••

☑ Remember me

SIGN IN WITH EMAIL

4. After signing in, to access your Control Panel, mouse over your country name & click the Control Panel link

⛓Wiki 👤

dems@democratsabroad.org

④ **⊞ Control panel**

⊡ Your pages

Rules for the admin login

-   The **login to use** for membership and/or emailing is the one you receive after passing certification: info-yourcountry+AA@democratsabroad.org or info-CC-yourchapter+AA@democratsabroad.org

- The Global Helpdesk/IT team are the **only ones who can give out this login. Do NOT give it to others.**

- For data safety, when writing to the Helpdesk**, NEVER ever send the login and password in the same email!**

-   You **DON'T need to activate** this login and you **must not reset the password and do not edit any of the data**. Simply enter the info-... email address and password on the sign-in page.

-   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. If it's still not working contact the Helpdesk right away.

-   *Do NOT link this login with your personal facebook page* (nor with your country or chapter fb page). This may change the name of the login.

Your left nav menu

NationBuilder

- Dashboard
- People
- Communication >
- Settings
- Live site

Once you've logged in you'll see the main navigation menu on the left side of the page. Here are the key features.
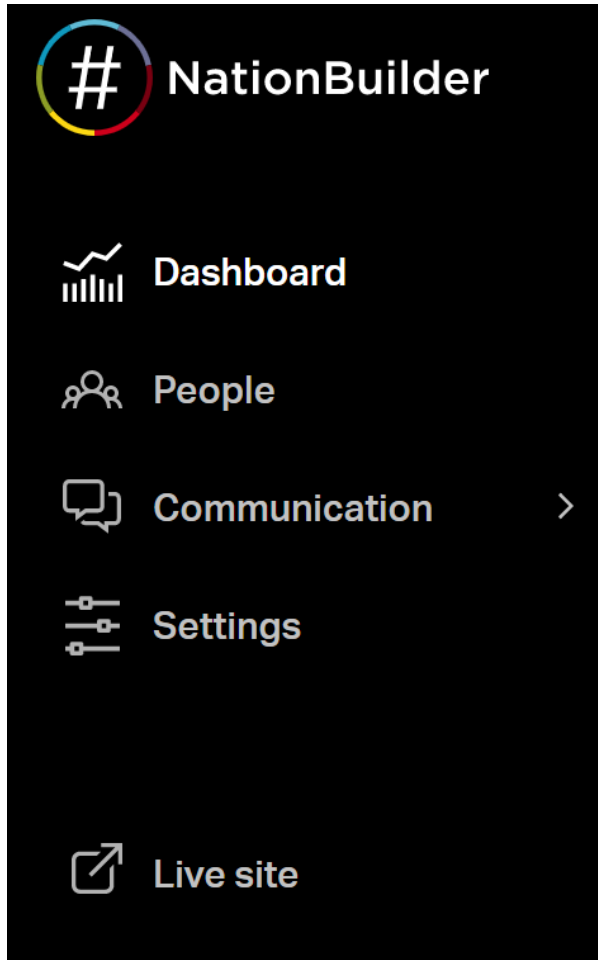
Dashboard – to view your activity, contacts made, and follow-ups needed (slides 6-10)

People – find, edit, tag, group your members and much more (slides 11-26) – **Do NOT use this page to add new members because it does not create all the needed backend coding.**

Communication – the tab for email blasts and broadcasters

Settings – view your account settings (do ***NOT*** change any of these fields for your country/chapter Point Person account!)

**Live Site** – a quick and easy way to move from the database side to our website – the public side

New Member process: How to know when you have a new member in your country or chapter – Method 1

*Techie messages from NationBuilder (our database platform):*

- When a member joins, or moves to your country or is assigned to your chapter. You will receive a message with a subject line: *You are the new point person for XXX*

- If a member uses VoteFromAbroad to join DA, the subject may be: *XX has answered a survey* (the database's way of telling you that the person has entered your country as their residence)

- If someone has moved from your country or been assigned to a new chapter, the subject will be: *XX is the new point person for YYY*

<u>Let us know</u> if you should be receiving these messages and don't or suddenly stop receiving such messages!

New Member process: How to know when you have a new member – Method 2
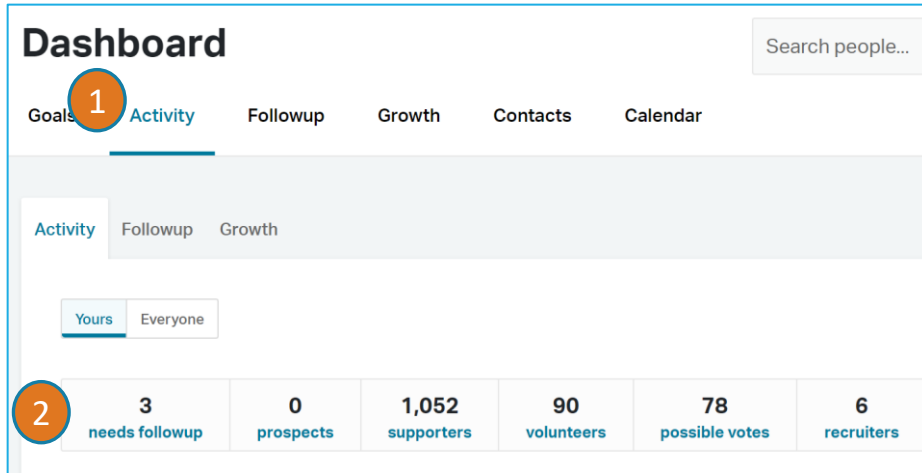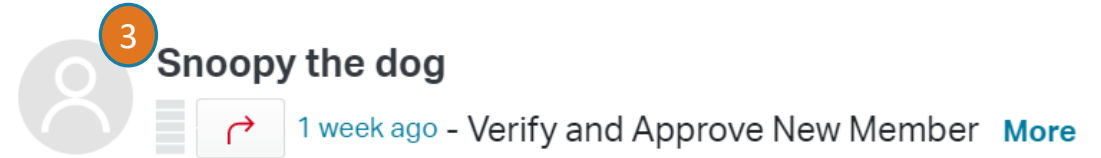
1. On the Dashboard click the Activity tab to see the list of people who need a follow-up. Make sure you have selected the "YOURS" tab to see just our own members.

2. Click the needs follow-up link to see the pending members.

3. Click on the person's name to open the record and verify their membership data

Note: Another way to find new members is to search (filter) for the type of follow-up needed: Open the 'All Types' box, then select Verify and Approve New Member. See slide 20 on filters.

And in general the most recent members, those pending approval, appear at the top of the full membership list on the person tab.

Special case: A new member asks you to 'join' them

1. The **ONLY WAY to add a member yourself is to fill out the join form at the member's request** (the form you used when you joined Democrats Abroad). Make sure you are signed out or using a different browser.
Click Join with Email or www.democratsabroad.org/join

2. **Double check that you are creating a separate new member join.** There have been instances where 2 or 3 new member were mixed in the same join form – or with the info-*-@ login!

3. Enter the member's information in the join form.
When you reach the final screen and click finish, the point person (probably you) will receive an email from Nation Builder that a new member "has filled in a survey" and the member will also receive confirmation.

4. **Never EVER use the New Person** button at the top of the screen. This creates an incomplete record and a real mess!

Special case:
Email Addresses: Duplicate or Shared address?

Like almost all databases, Nation Builder considers the email address to be a unique identifier.

So if, when joining a new member or editing an existing one, the program says that the email address already exists, you should search your database for the email address (see how to do this on slide **17**).

- If you **find your member already** in the database, then you should update this member record instead of creating a new one. And remember to set the Last Verified Date **(see slide 11)**

- If the email address **belongs to someone else in the family**, then you can nevertheless create the new member giving them a unique email address**, using a slight trick**:
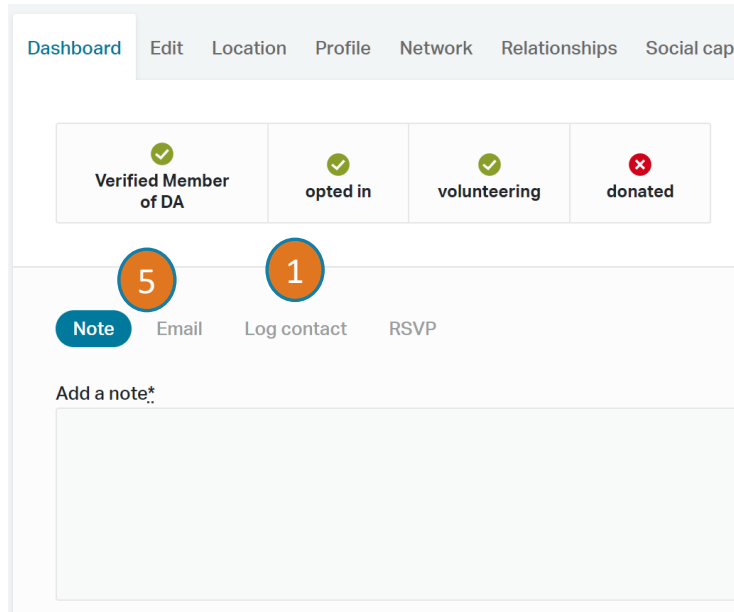
Example:
Existing member's address: Alreadymember@gmail.com
New member: Alreadymember**+shared1**@gmail.com
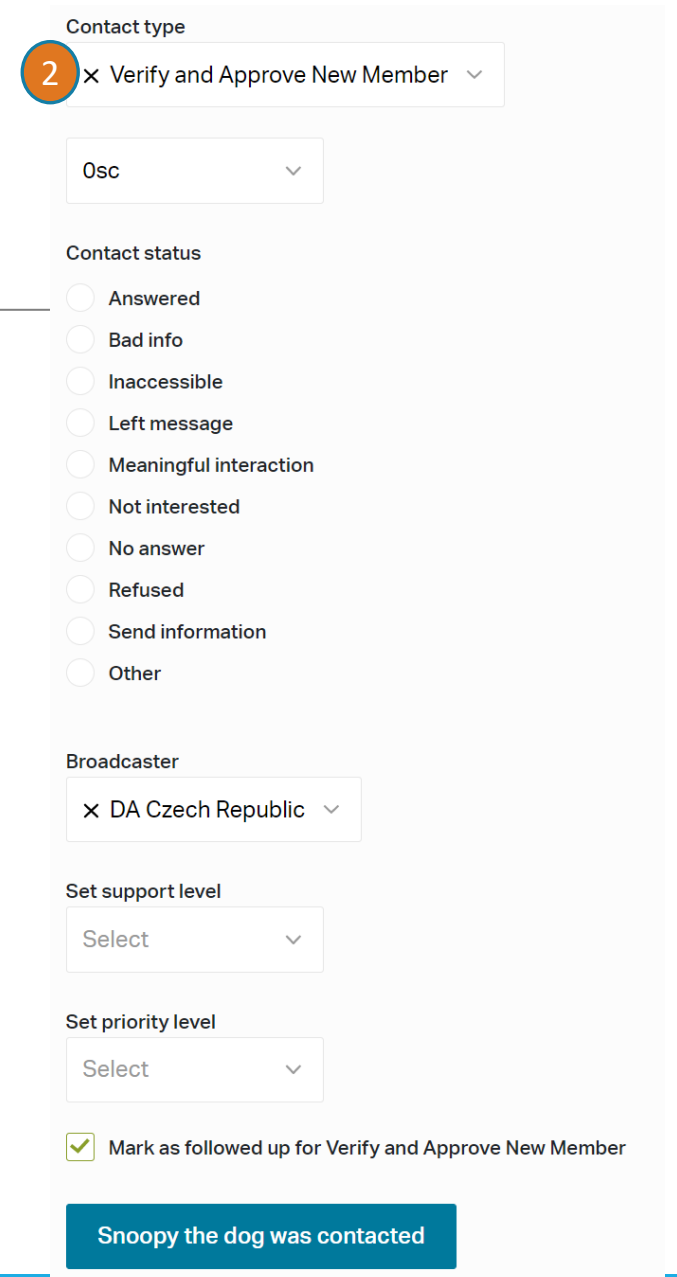Second new member: Alreadymember**+shared2**@gmail.com

If you **CAN'T find the member** with the matching email address, send it to the Helpdesk and we will search for it globally.

The Membership Process:
How to Approve a New Member

Contact type

2 ✕ Verify and Approve New Member ⌄

Osc ⌄

Contact status

○ Answered
○ Bad info
○ Inaccessible
○ Left message
○ Meaningful interaction
○ Not interested
○ No answer
○ Refused
○ Send information
○ Other

2. Make sure you see "Verify and Approve New Member"

3. Click "Mark as followed up for Verify and Approve"

4. Click the blue button to confirm the contact with the member.

5. **See the next slide on how to Approve and Welcome a new member in just one step**

1. To log the first contact between DA and the new member, after verifying the member scroll midway down the screen and click Log Contact.

Broadcaster

✕ DA Czech Republic ⌄

Set support level

Select ⌄

Set priority level

Select ⌄

3 ☑ Mark as followed up for Verify and Approve New Member

4 **Snoopy the dog was contacted**

The Membership Process: Do 2 things at once: Approve and Welcome a New Member

1. Countries that approve and welcome new members at the country level can do both at the same time.
Click the Email link in the Dashboard**.**

1. You can send a copy to anyone else of choice (such as the chapter chair)**.**

Note: there is also a method to welcome a group of members in one more sophisticated email, sent from the country/chapter broadcaster. Contact the Helpdesk for information on this.

3. Write your message and scroll below to make sure you see "Verify and Approve New Member" and click "Mark as followed up for Verify and Approve**"**

4. Click the blue button to send the Email and Approve the new member.

The Membership Process:
Last Verified Date/Expiry Date - Updating

Contact type

2 × Verified Still Living in Country ∨

Osc ∨

Contact status

○ Answered
○ Bad info
○ Inaccessible
○ Left message
○ Meaningful interaction
○ Not interested
○ No answer
○ Refused
○ Send information
○ Other

Broadcaster

× DA Czech Republic ∨

Set support level

Select ∨

Set priority level

Select ∨

3 Mascot the cat was contacted

1. Use Log Contact (see previous slide) to **confirm that someone is still a member** living in your country. <u>See our guide</u> on things you can do all year long to verify your members.

2. Open the contact type and select "Verify Still Living in Country"

3. Click the blue button to confirm the contact with the member.

- The **Date last verified** is set or updated automatically when a member joins, uses VotefromAbroad, verifies themselves, RSVPs to an event, is contacted via CallHub or when someone else (= you the admin) verifies them.

- Setting this Verified contact will set an "Expiry Date" 4 years later. (**Tip**: You can find this date on a person's record by clicking the Edit tab, then Memberships.)

- When the expiration date approaches you will be warned that the member needs follow-up.

- **Important note:** *"Expired memberships" will not be included in the official membership count*, ***BUT are members in every other sense of the word***.

The Membership Process: Last Verified Date/Expiry Date - tips

Not all Types of Contact update the Last Verified Date/Membership Expires date
General principle: the Type of Action refers to your (DA's) action NOT the member's

- When the contact type is more ***inter***active the dates ARE updated: Face to Face, Meeting, 1-1 Text, Webinar, or Other.

- The LVD/Expiry is NOT updated when we contact someone via ***Email, Phone Call, Video Call - UNLESS you combine contact type with certain types of results***, (such as Email / Answered or Meaningful Interaction. This is a good way to provide more precise information, rather than simply 'other'

- To check: Go to Edit/Memberships. The Expiration Date should be 4 years from today's date (this field may not be updated immediately however).

- <u>See our Guide</u> for information on how to verify your members regularly throughout the year.
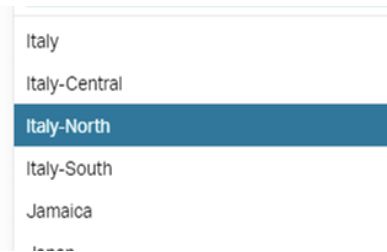
A couple of things you can do on the Edit tab and a thing you shouldn't do

Dashboard | **Edit** | Location

Important note: Be sure to consult the <u>GDPR guide</u> for instructions on when you can and CANNOT edit a member's data!

Italy
Italy-Central
Italy-North
Italy-South
Jamaica

To ***assign your member to a chapter***, scroll down to the Point Person (on the right about half-way down and open the list assign the appropriate chapter Point Person
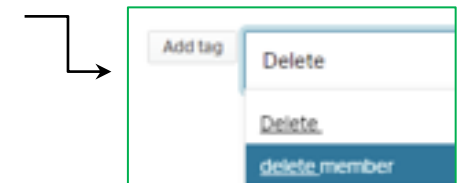
Email

snoopythedog@fakemail.com

When ***updating an email address***, if "Bad email address" is clicked this means the old address was on hold. So make sure you **unclick** this button.

☑ Bad email address

But DON'T use the delete button on the edit page:
If you need to ***delete a member***, ***add the tag "delete member"***.
This record will then be processed for full deletion within 48 hours. Do not delete them yourself because some important steps do not get done.

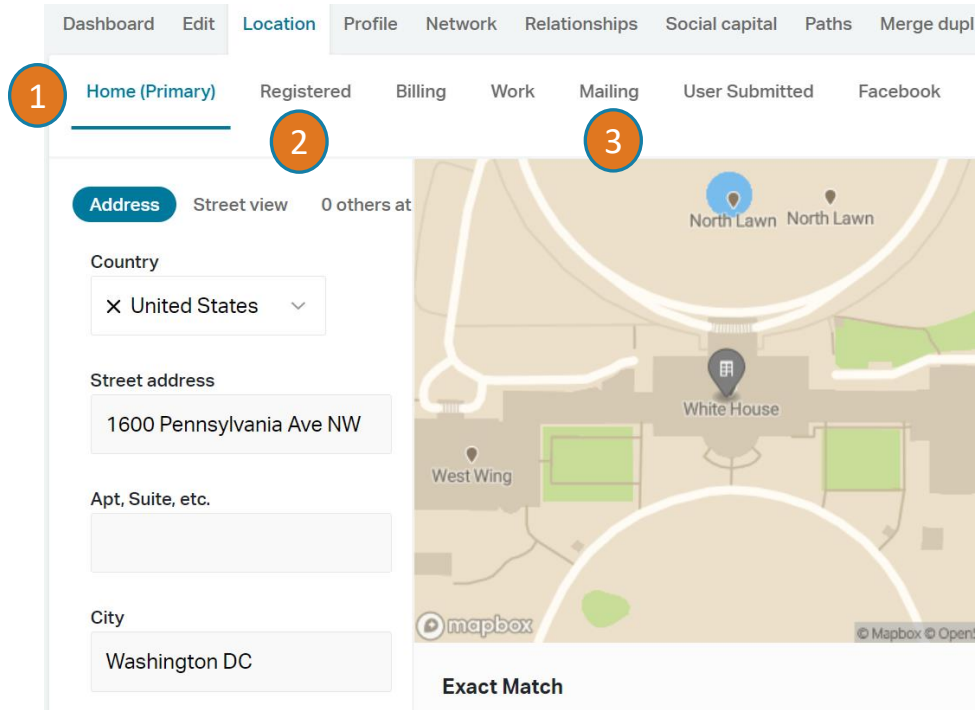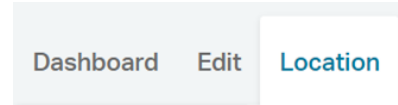Add tag | Delete
Delete.
delete member

!!! Save person

IMPORTANT: ALWAYS scroll to the bottom of the page to save your edits

What you can do on the Location tab

A neat feature is the map next to the address!

1. **Home (primary)** – the address abroad, in your country
2. **Registered** – the US address where the member is *registered* to vote
3. **Mailing** – used for APO addresses or mail services

NOTE: You don't need to do anything with the other address tabs.

!!! **IMPORTANT! Don't forget to click Save Location!!!**

Moving a member to a new country **+** special case for the **U**S**A**

Back to USA: **For people who have asked to join the "US Alumni Group" after returning to the USA simply tag the record as "Move to US".** They will be processed as a "returned member" withing 24-48 hours.

For all other cases (moving to countries other than the USA):

1. **BEFORE going to the location tab, first Edit** any new non-street address data you have, like email address, phone number, etc. This is because **once you change the address (country) you will no longer have access to this record**.

2. Open the Location Tab and go to the **Home (Primary) Address** – Open the Country scroll box and select the member's new country.

3. Remove the old address and enter the address in the new country if you have it. If you don't, enter as much info as possible (city at least).

4. This will update the Point Person to the new country. Both you and the new country's admin will receive an email from Nation Builder about this point person change.

# How to set up the Leadership list on your country / chapter page

1. In the square just under the member's basic data, add the tag XX: Leader (where XX=ISO country code, for chapters: XX-Chapter: Leader). Click to select then click Save. In this example IT=Italy

2. Click the Profile link, then scroll down to Headline and enter the person's office.

3. Set the Priority: 5= Chair, 4= VC, 3= Secretary and/or Treasurer, 2= Legal Counsel and/or Voting Rep, 1= other officers.
   There are 2 ways to do this: Click the little bars next to the add tag icon under the person's name, select level then DOUBLE click to set. Or go to Edit, Priority and choose.

4. Click on Live Site near the bottom of the black navigation menu. Search for your country to see the result

The easiest search box
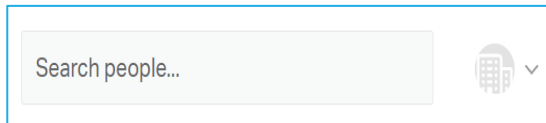
The quickest search is from the box in the upper right-hand corner, next to your login icon

Search is "contains" Here are the easiest quick searches:

- Sure-fire quick finds**: ID number or full email address**

- Quick finds:
    - Last name (unless the name is super common)
    - Part of email address ex: myaddress@ or @serviceprovider.com. You have to include the @ so the search knows to look for emails.
    - % is the wildcard to use when you don't know if the person uses full name, double last name, etc. For example: Ale%Cort would help you find *Ale*xandra Ocasio-*Cort*ez. R%Bur% will find Richard Burton and Raymond Burr.

Using the filter to find your members - 1
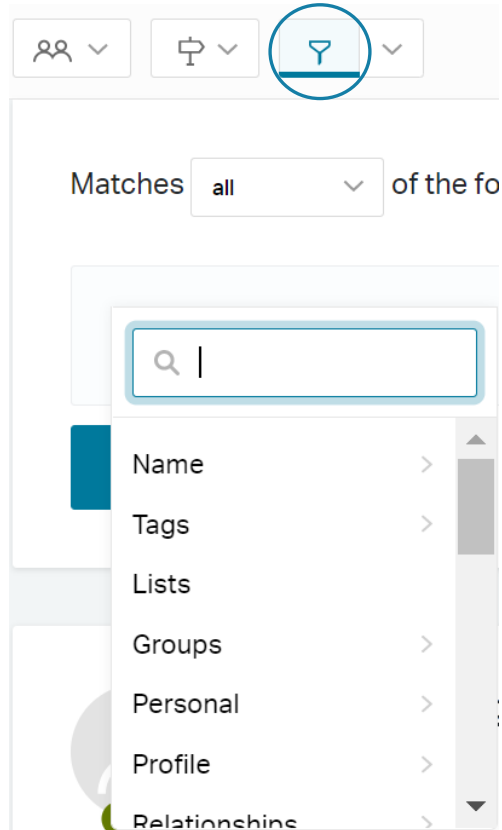
The **Filter** is a very complete Boolean search tool.
Click the funnel to open the tool. Choose all or any, and click Add Criteria to choose first the criteria type, then the actual data itself. Or else enter a field name in the search box.

Important note for countries with chapters: Always make sure that you select "Showing: People" before you search for your People! If you select People and Organizations you risk taking the wrong action with one of your chapter organizations (like assigning one chapter to another chapter's point person)
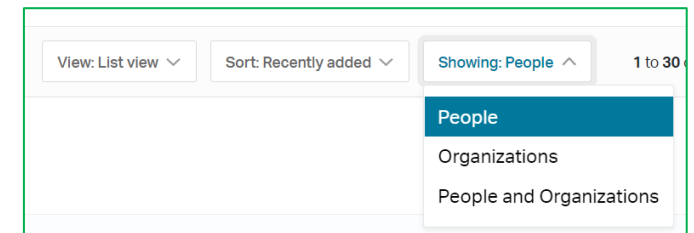
How to find your members - 2

The easiest way to enter search criteria is to just begin typing the word
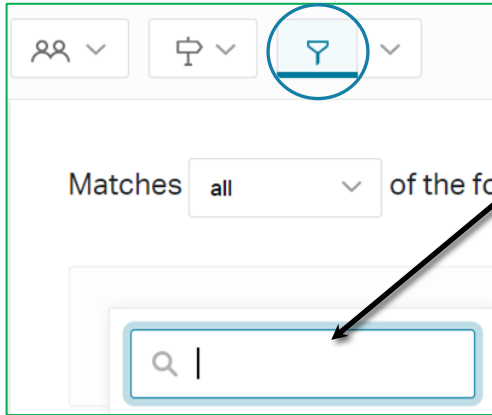
Some helpful searches:

Your whole country: <u>Membership Country</u> (located in Custom Fields)

People in a specific chapter: <u>Point Person</u>

Members by voting state: Registered Address <u>State</u>

Pending tasks: <u>Needs follow-up</u>
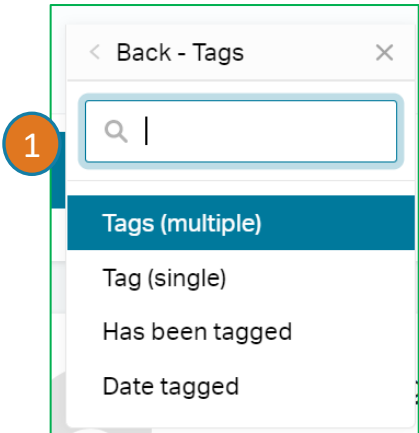
To add criteria click Add Group Row on the right or Add Criteria on the left.
To cancel a criteria click the X on the right
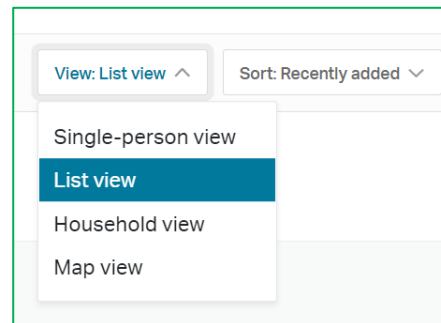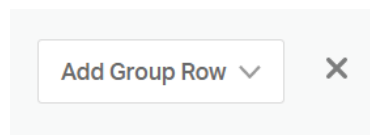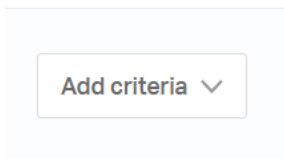
Choose Single-person View or List View from the drop down navigation in the top right

How to find your members - 3
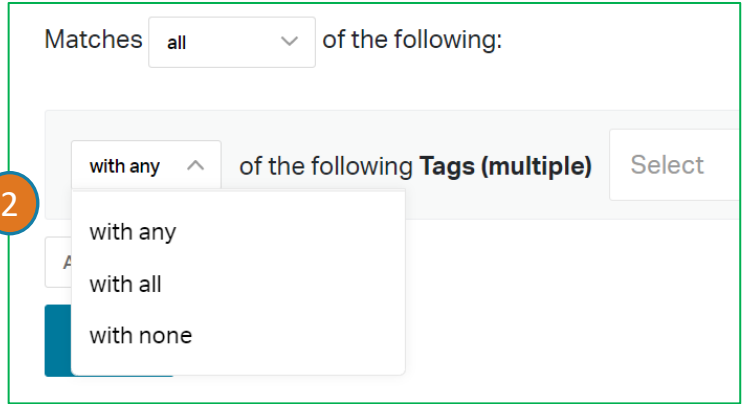
Tags

To search on a certain tag:

1. Click "Tags (multiple)"

2. Choose with all or any - or with none - then click the Select box to display the name of tags

3. You can also add another row to a search group to include one type of tag and exclude another – useful for emailing. For example, choose a tag to include people people tagged, then Add a Group Row to add other criteria excluding people who have opted out of certain types of emails.
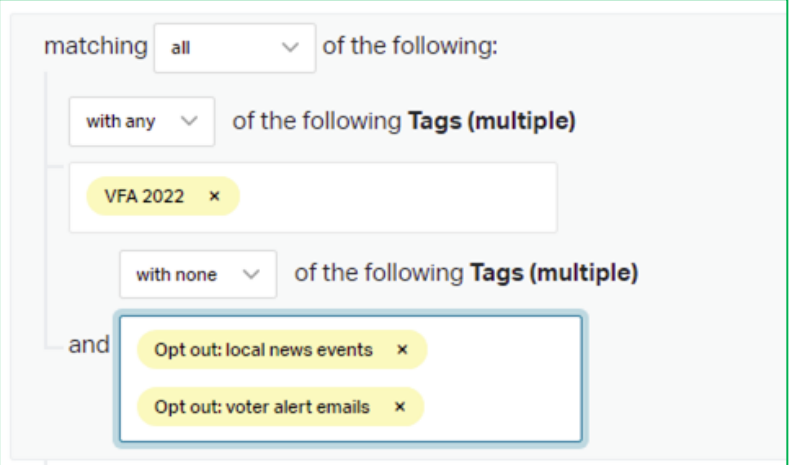
How to lasso in a group of members: Map View
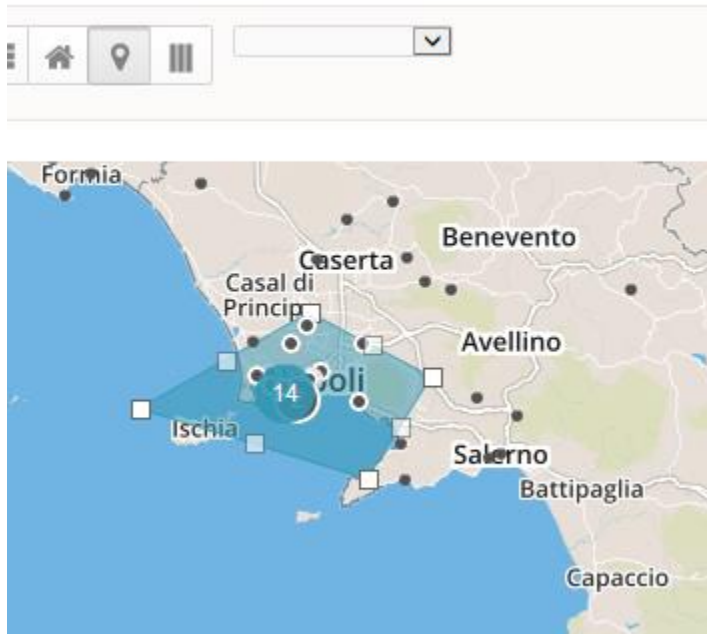
Use Map View to visually locate members living in a specific area, for example for a targeted mailing. Zoom into the area and use turf cut to trace an area. Then you can tag them or add them to a list

For our special Guide on the Map View, click here

I've found my people, now what do I do? Saved Filters, Lists and Tags

SAVED FILTERS are one of our most powerful tools. They are **dynamic** groupings of people who match certain criteria. Create filters to target people in your database by specific criteria.

LISTS are a relatively static way to organize people within your database intended for <u>one-time use</u> or for <u>batch updates</u>. They are not dynamic, however, meaning that list members who no longer fit the original search criteria are NOT removed, and people newly fitting the criteria are not added.

TAGS are used to find people who have characteristics in common, so you can generate lists and filters, and group people according to your needs. Tags are also permanent, and won't change or update unless you do so manually, or via batch update.
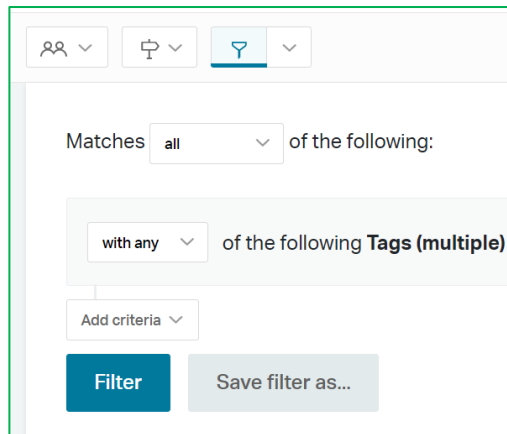
Want to learn more about filters, tags and lists? Here's a <u>general explanation by Nation Builder</u> (some aspects explained, however, may not apply to Democrats Abroad)

RULE: Any list tag or filter you create must start with your country or group code, ex: DE-Berlin Young Dems, NZ-Wellington, GWC-ERA
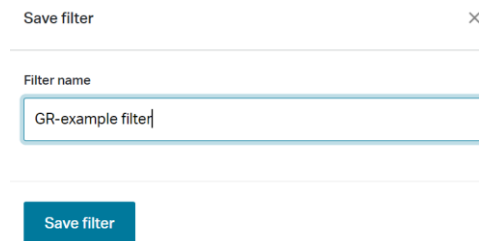
I've found my people, now what do I do?
## *Saved Filters*, Lists and Tags - 1

Save dynamic filters of criteria you need regularly (city, zip codes, etc.)
For example: a local group that's not a chapter
Remember to preface the Saved filter with your country code: Ex: NZ-Wellington, FR-Young Dems

You can create a new Saved Filter by adding criteria to an existing Saved Filter (ex: adapting GOTV TX VOTERS to limit your filter to voters who are also in the Women's Caucus). Add the additional criterion (Tag is any= Global Womens Caucus), then make VERY sure you click **Save Filter As** and give your own filter a new name (DE-TX-and-GWC). If not, you'll render the original filter unusable.

Want to learn more about filters, tags and lists?
Here's a general explanation by Nation Builder (some aspects explained, however, may not apply to Democrats Abroad)

# I've found my people, now what do I do?
Lists – 2.1
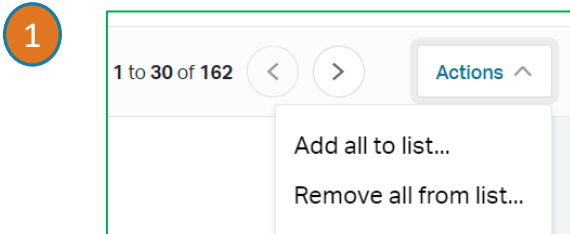
1. Add the members found to a list so you can (for example):
- Send them a targeted email
- Add them to or remove them from a chapter, etc.

To add (or remove) several people at once you must filter for them, and then make sure you are in LIST VIEW
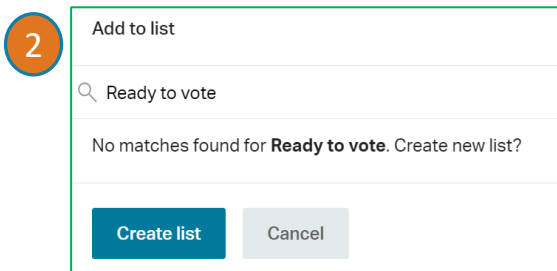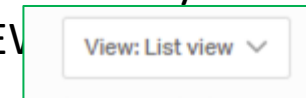
2. To find the list, start typing the name. For a new list, type the name and when prompted click **Create List**
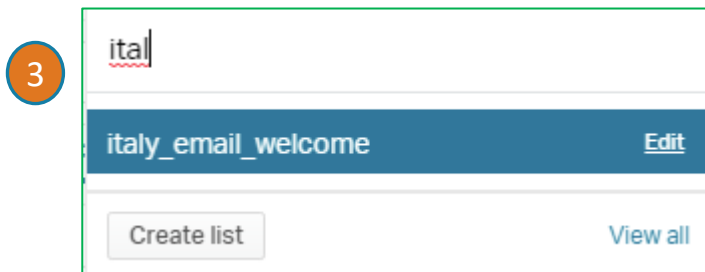
3. To edit - or delete - a list, look for the name then click mouse over the number of people in the list to display EDIT. (You can also create a new empty list here as well)
It's a good idea to delete a list when you're through using it and then create it again the next time.

See **the next slide for things you can do with a list**.

I've got my list, now what do I do?
Lists – 2.2

1. You can choose various actions – the most useful **is batch update** (ex: assign point person, add or remove tags for a series of people, etc.) – see the next slide.
2. After the action scroll to the bottom of the page to click **Update all x** people – make sure Bypass webhooks is clicked.
3. To **Delete the list** once you're through using it, click Delete this list on the bottom right.

Want to learn more about batch updates?
Here's a <u>general explanation by Nation Builder</u> (some aspects explained, however, may not apply to Democrats Abroad)

I've found my people, now what do I do?
Tags - 3

Tags are used to highlight certain criteria or characteristics. They can be added *manually* (ex: to tag people who voted in your last AGM or who are members of your local caucus).
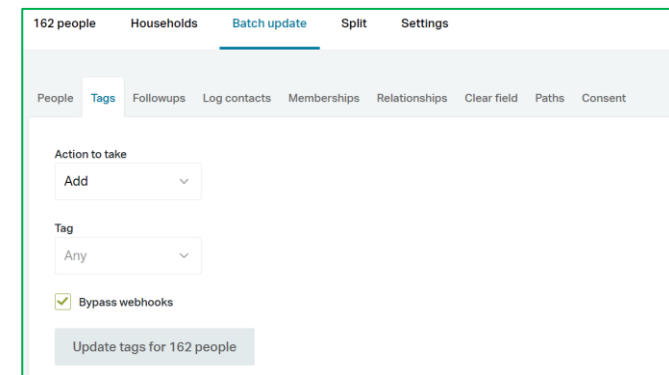
Some tags are also added automatically, like when someone is contacted via CallHub, or uses Vote From Abroad.

You can also set up an autotag to be applied when people click a button in an email – but this takes a bit of expertise. See the Guide here.

If you create a tag, make sure you preface it with your country or group code.

You will see that some members have lots of tags – please do not delete any just because they may look meaningless to you.

You can also use the List function to add or remove tags in bulk for several people at once.

EMAILING: 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.
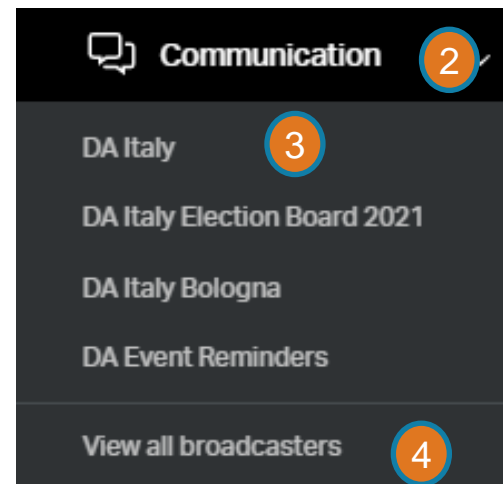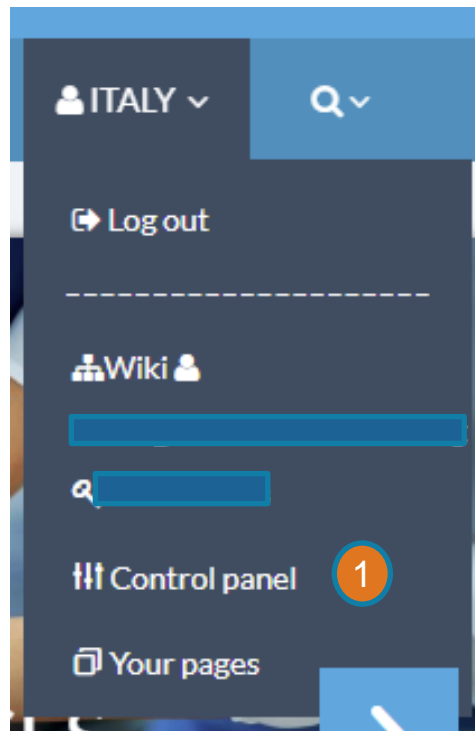
2. Click "Communication" to view broadcaster list.

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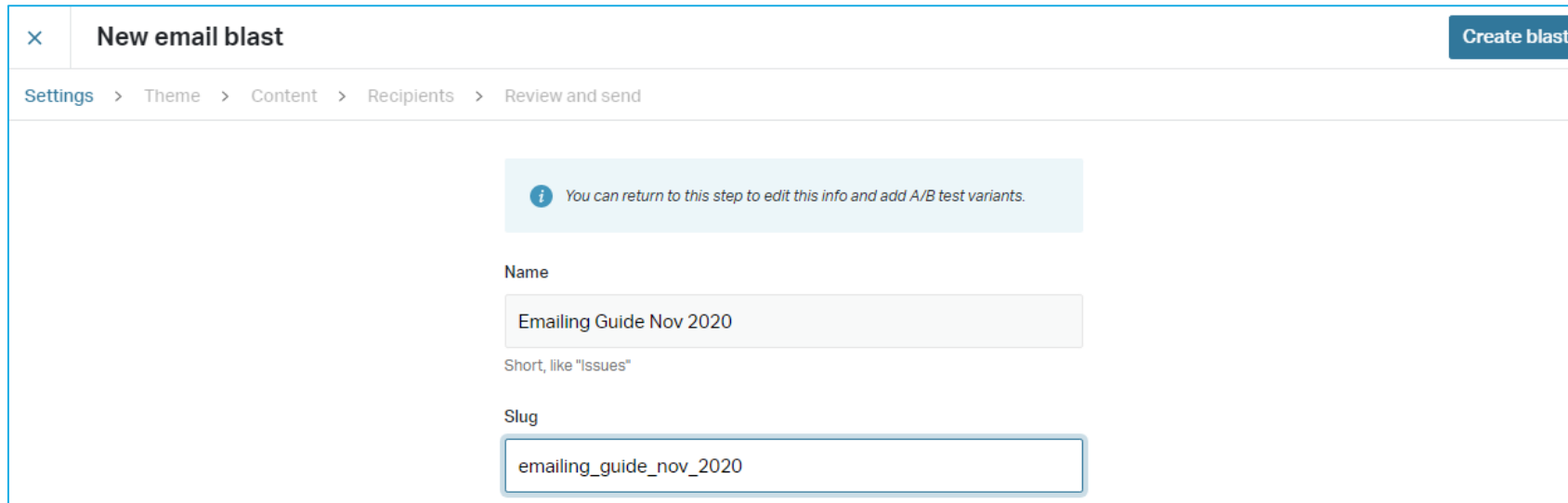
1. When you open your broadcaster window you can Start a new email blast by clicking "New Email blast" at the top.

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)

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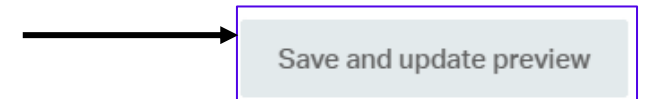
# The Email Content Editor - Components of an email blast
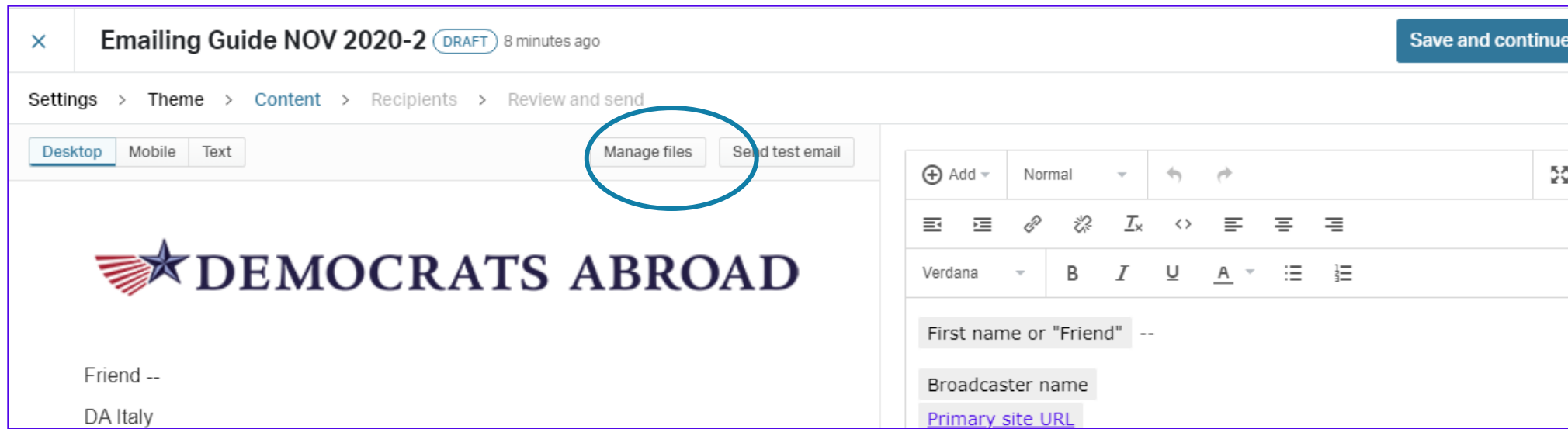
Manage files: You can now add files to hyperlink without having to leave the Content tab. After uploading the file, right click and copy the file link for pdfs and docs, then use the hyperlink button in the content editor.

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 an image like a blog poster.
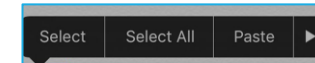
Once you've finished your text, click [Save and update preview] **Click** [Save and continue] **to move to the recipients tab (step) (see slide 20).**

Entering content - general
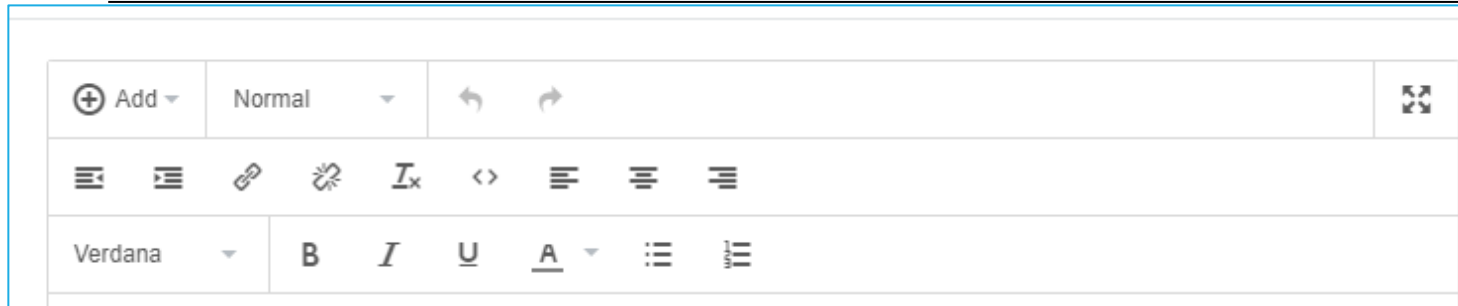
You can obviously type directly in the content box, but it's easier to paste in formatted text.
- **Keyboard**: Use **Ctrl+V** (PC), **Command ⌘ V** (Mac) **- Touch screens** follow the usual steps:


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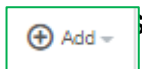
TIP: To keep a consistent **line spacing**, it's helpful in your Word file to replace the paragraph mark (^p) with a manual line break ^l (circumflex lower case l). You'll need to retain the paragraph mark though if you want special formatting for a paragraph.

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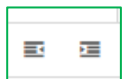**TIP**: HTML experts will find it easier to fix the line spacing by substituting some <p> with

The new Email editor – Formatting 1

See next page for these options
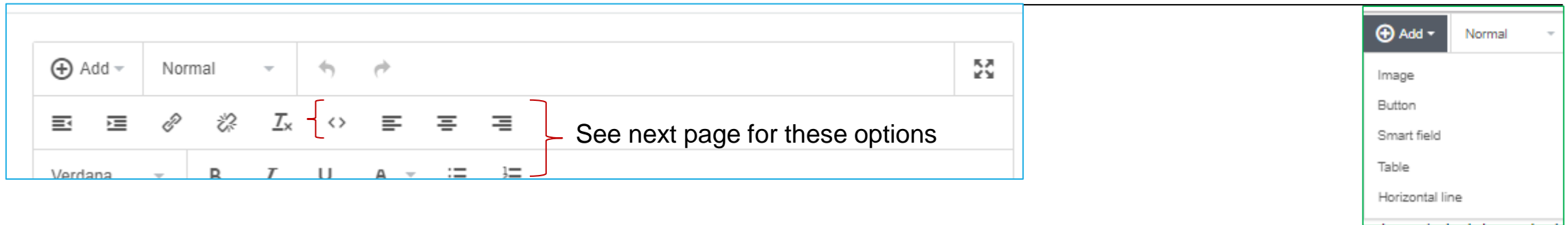
button groups several advanced options, described on slides 14-17.

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.
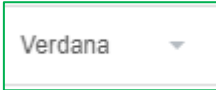
The new Email editor – Formatting 2
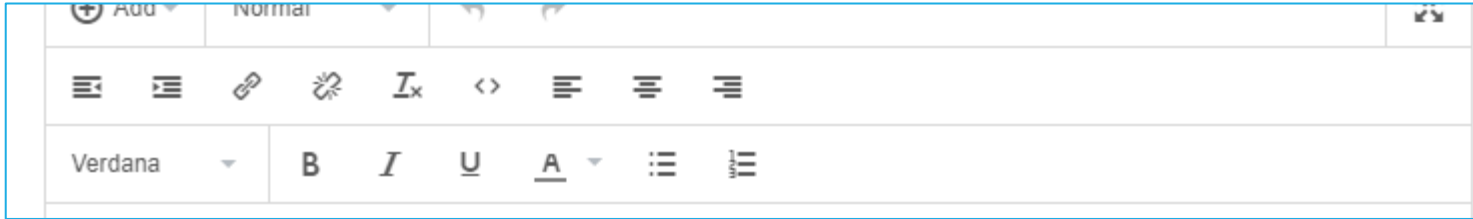
The **Source code** icon is used to insert, copy and edit HTML code. It can be helpful when you want use your email as the basis of a web posting.

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!!

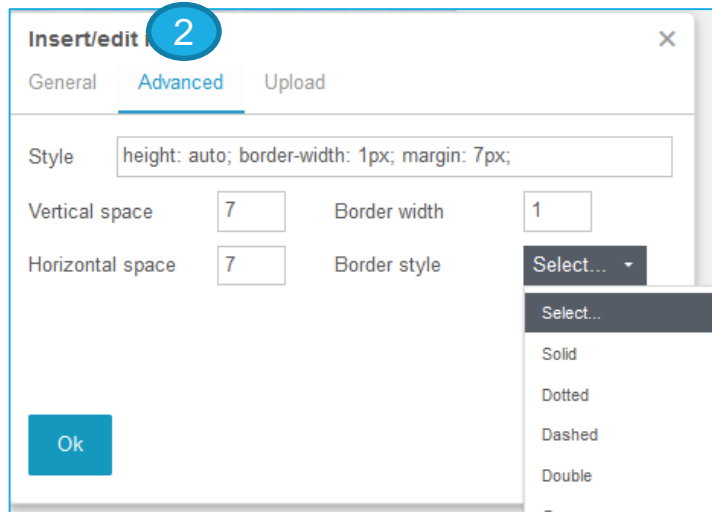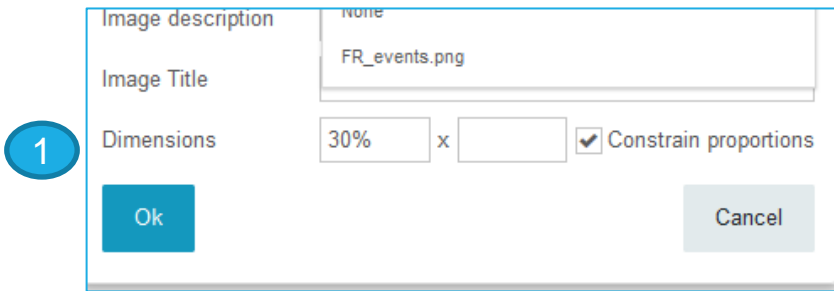# The new Email editor – Add Menu: Inserting an Image -1
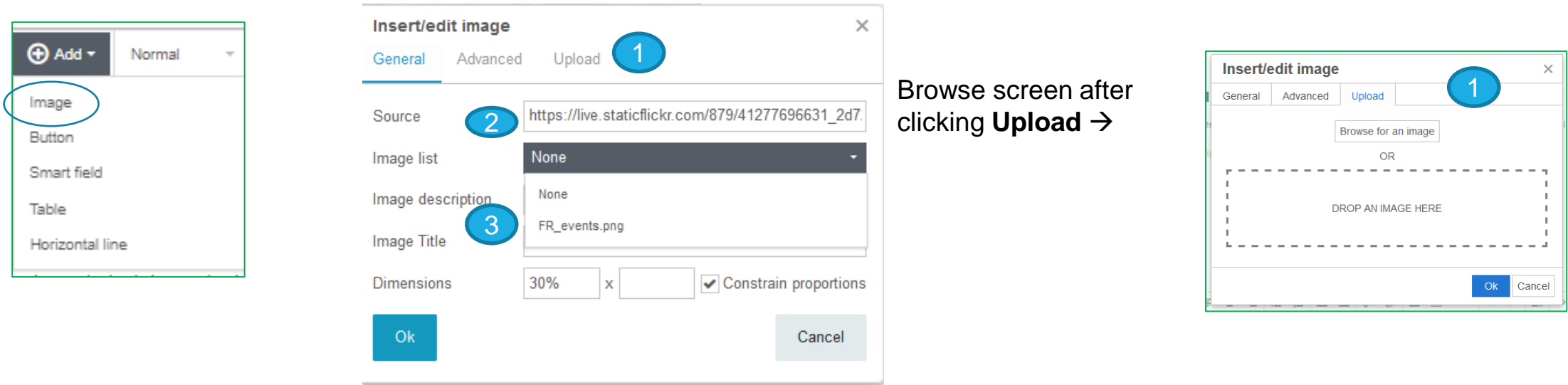
Browse screen after clicking **Upload** →

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

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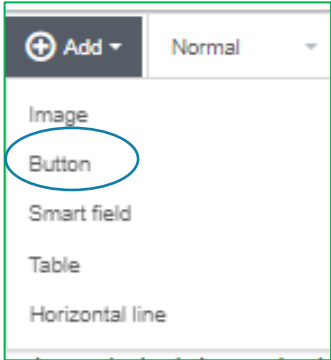
Buttons are great for grabbing your readers' attention – to get them to RSVP, volunteer or confirm their membership.

Button text: the message readers will see

Button URL: where clicking will send them to

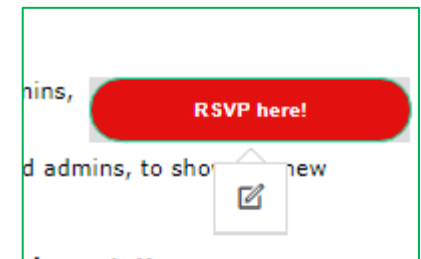**Colors: Text, Background, and Border:** click the colored box on the right to choose your color

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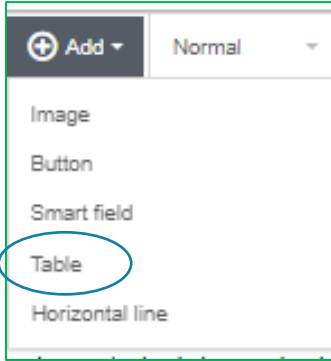
**To re-edit**, click on the button and a tiny Edit icon will appear

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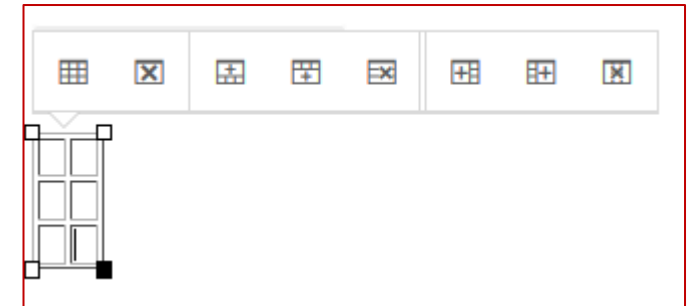
The new Email editor – Add Menu: Adding a Smart Field
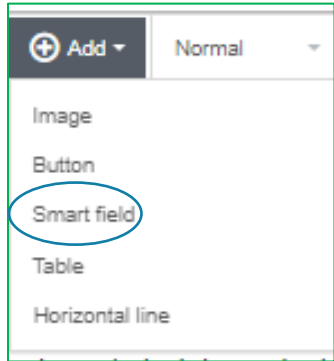
NationBuilder proposes a limited number of Smart fields, from the member recipient's record, that can be inserted in an email. Not all are relevant for our work, but some may be helpful for membership clean-up campaigns or member surveys.

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
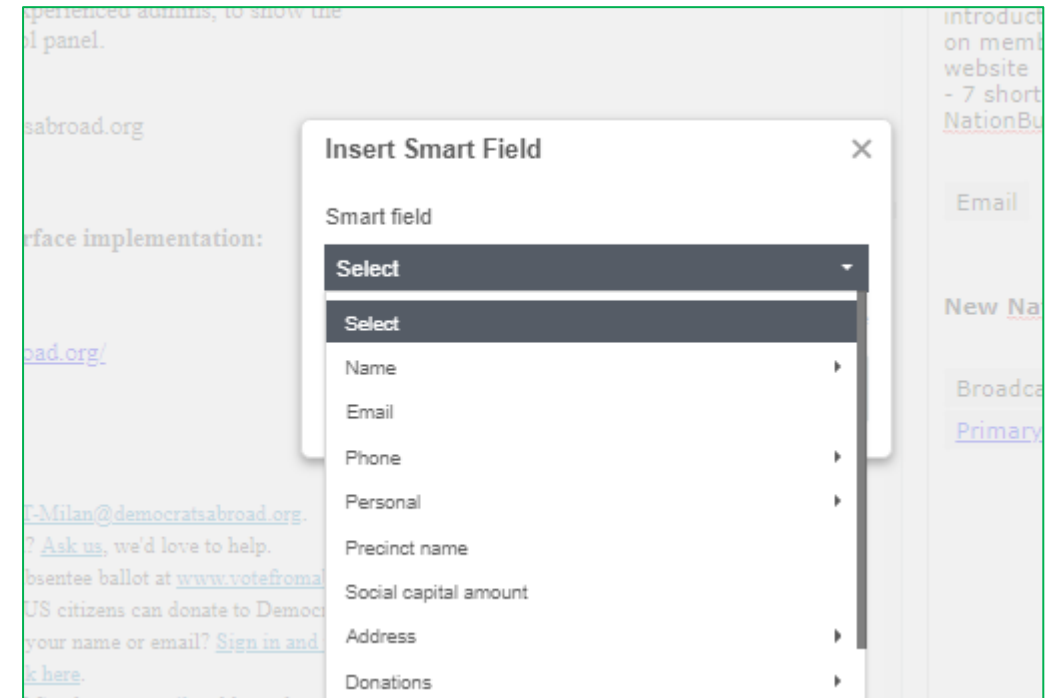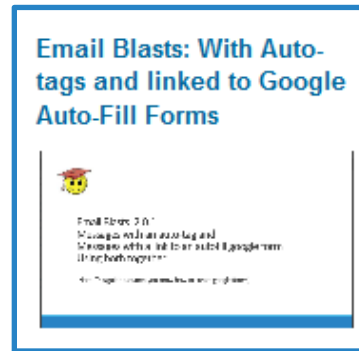
Saving your email - first Preview and Test Email

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 preview **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 box.
Don't send to the info-* address, but to your or your colleagues' own member email address to make sure all links work the way they should for recipients, and check the line spacing etc.

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.
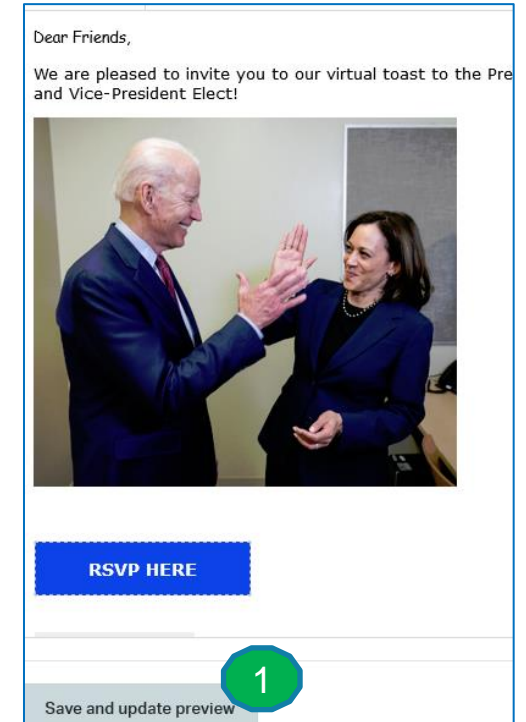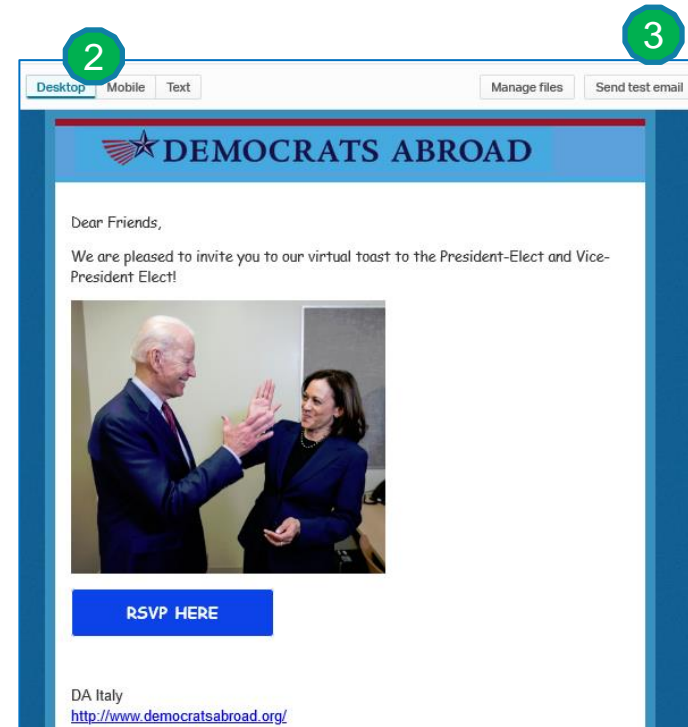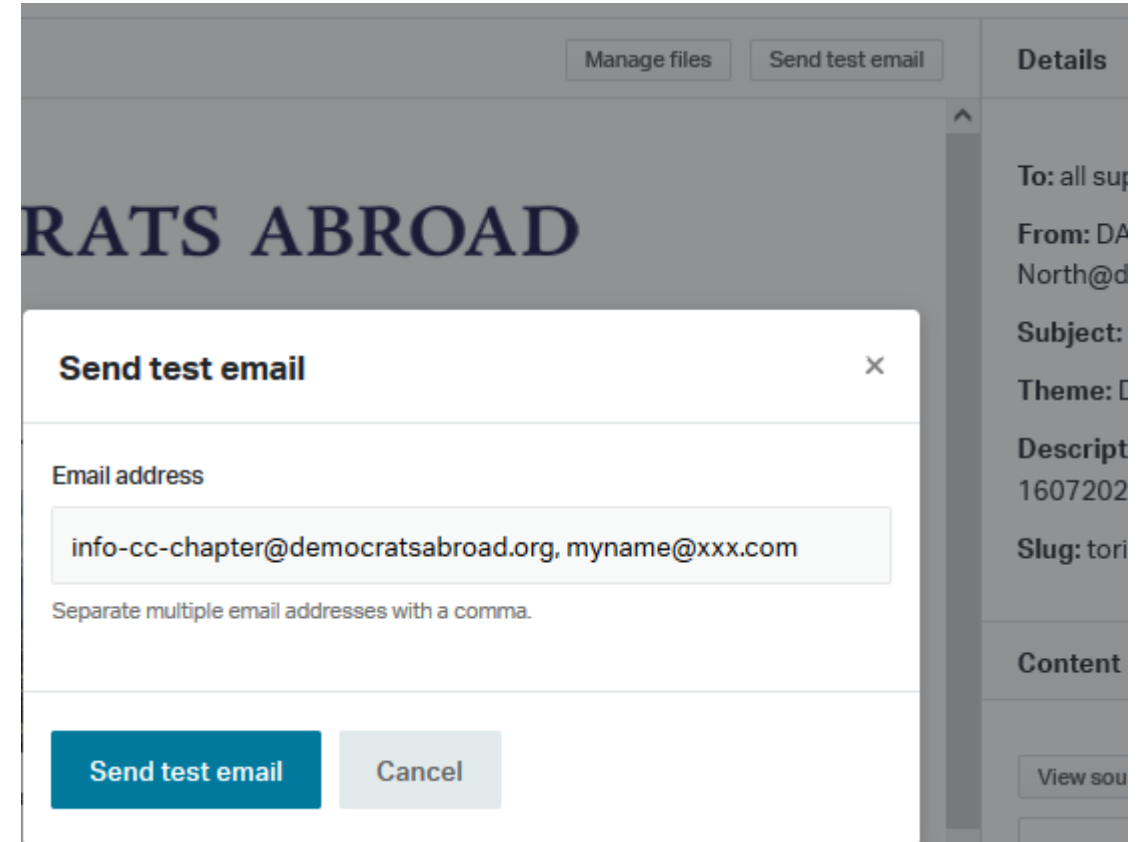
The many uses of a test email

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,.

Manage files   Send test email   Details

RATS ABROAD

To: all sup

From: DA

North@d

Subject:

Theme: [

Descript

1607202

Slug: tori

Send test email   ✕

Email address

info-cc-chapter@democratsabroad.org, myname@xxx.com

Separate multiple email addresses with a comma.

Content

Send test email   Cancel

View sou

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.
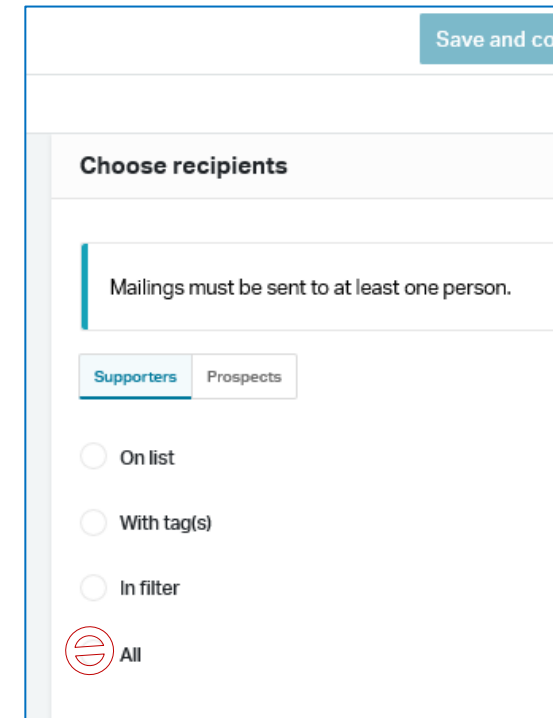
Country and Chapter Admins: Use **Filter** "**Receive Local Emails**" to email your members. Please do not rename it or create your own national copy. This filter will work for your chapter or your country without any changes

If you are sending to a 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.

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:**
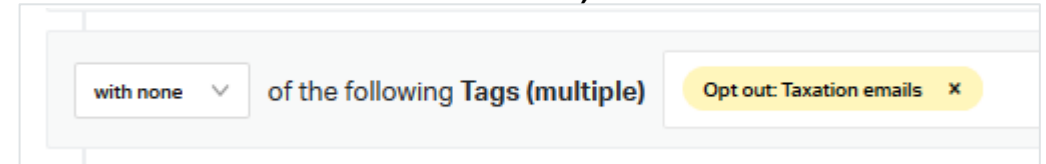
3.Use **Save Filter As** to **SAVE** your adapted filter with a name like "CC-ISSUE-Email" ("FI-Taxation-Email"). Be careful to use 'Save Filter As', and not 'Save Filter', which would change the filter for everyone.

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
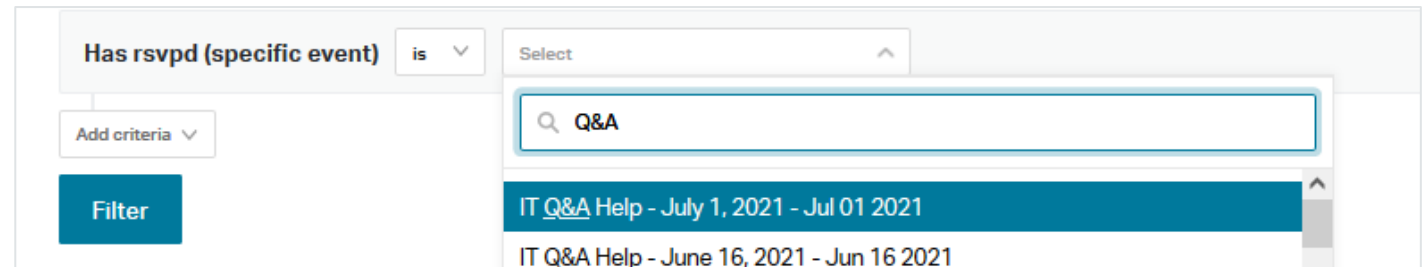
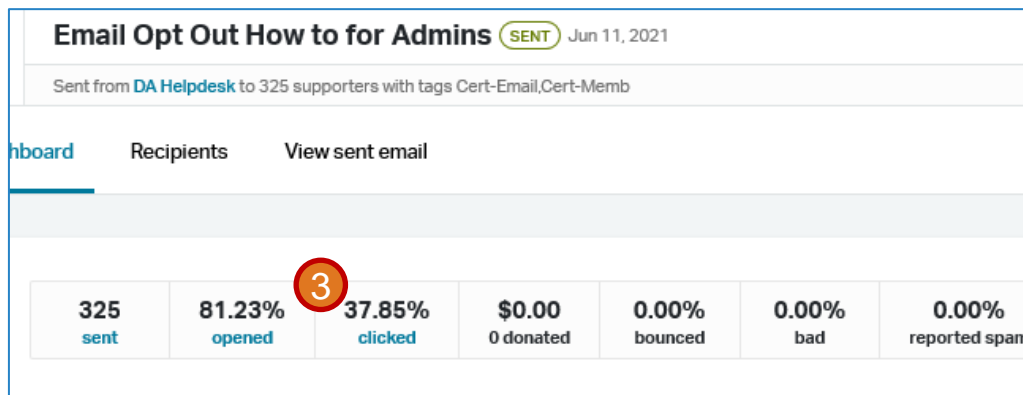# Review and Send your Email Blast

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.

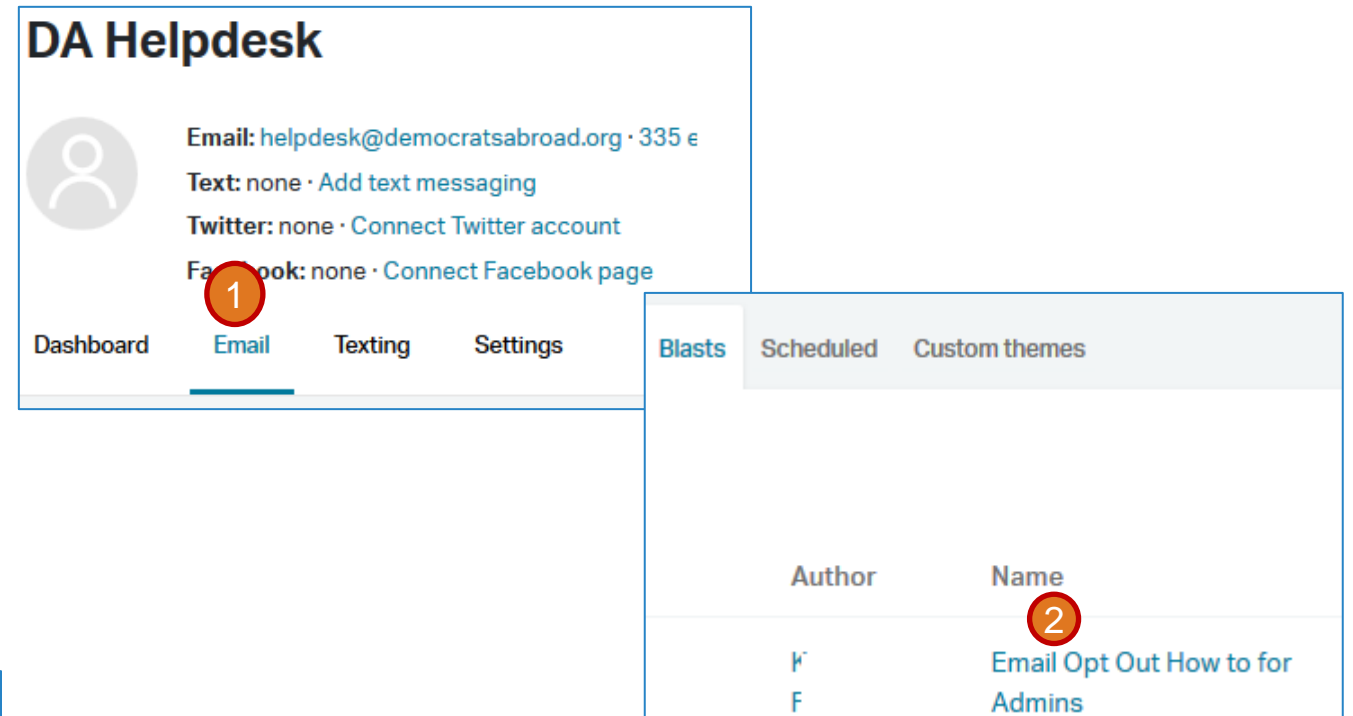2. Click Email and click on the Name to open the details

3. Click the individual hyperlinks under each section to see who opened the file, what links were clicked, whose email bounced and so on.

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