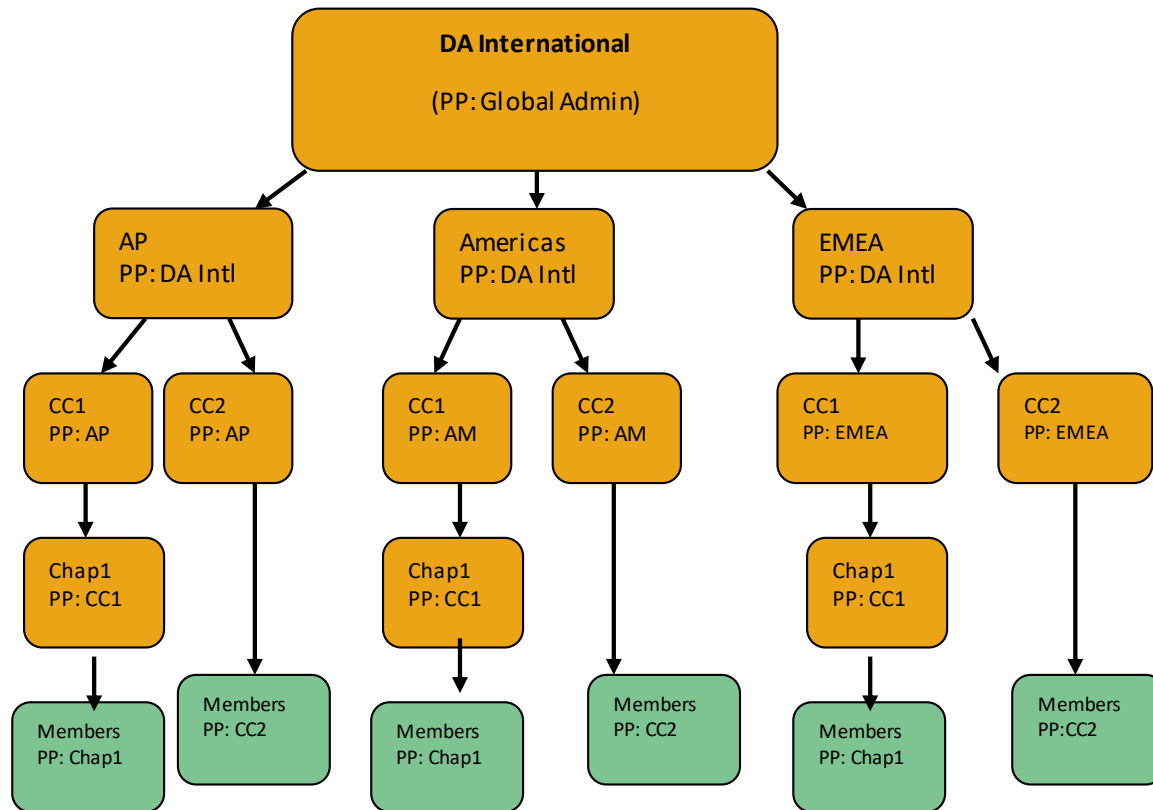# DA Country Committee Membership Management

AUGUST 2017

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 admin is no longer an individual person but the organization point person. If a group has more than 1 admin, the login is shared.

- You will work with a login like:
    Info-country@democratsabroad.org
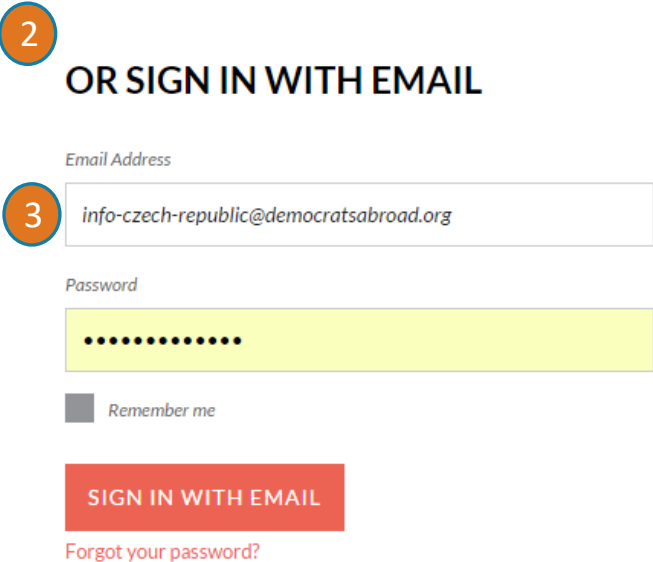   Info-CC-chapter@democratsabroad.org

How to login
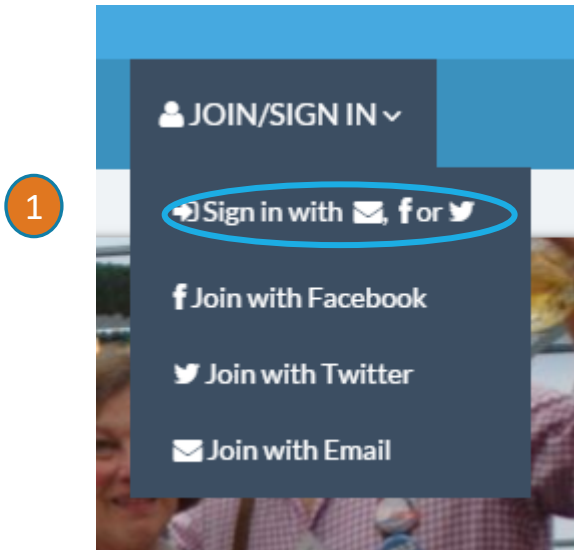
Go to www.democratsabroad.org
1. Mouse over the Join/Sign In button and click "Sign in with Email".
2. Once on the "Sign In" page, find "Sign in with Email".
3. Fill in the username and password and click "Sign in with email".
     Username = your organization login
   Password = password assigned to you

4. After signing in, to access your Control Panel for membership management, mouse over your name and click the Control Panel link
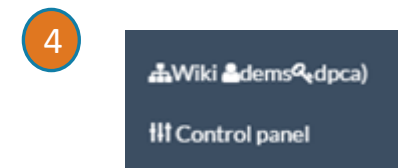
Rules for the membership admin login

- The **login to use** for membership and/or emailing is the one you receive after passing certification: info-yourcountry@democratsabroad.org or: info-CC-yourchapter@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 or anything. Simply enter the info-... email address and password.

- 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 this login with your personal facebook page* (nor, for the time being at least, with your country or chapter fb page). This changes the name of the login

Your main menu
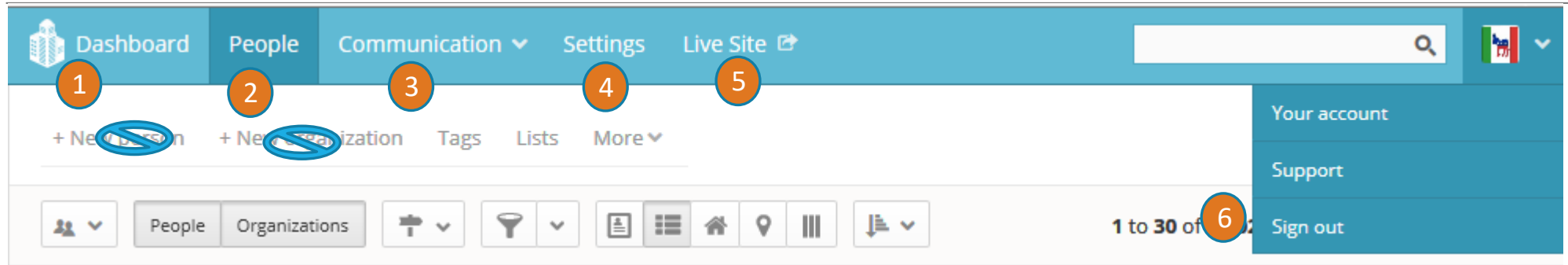
1. **Dashboard** – to view your activity, contacts made, and followups needed (slides 6-10)
2. **People** – find, edit, tag, group your members and much more (slides 11-23) – **Do NOT use this page to add new members as it does not create all the needed backend coding.**
3. **Communication** – the tab for email blasts and broadcasters
4. **Settings** – view your account settings (do ***NOT*** change these for your country/chapter Point Person account!)
5. **Live Site** – to view our web content
6. Account settings, the Nation Builder help pages and sign out

The Membership Process:
A new member joins or you enter a new member

1. The **ONLY WAY** **to add a member yourself is to use the join form** (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 more than one 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. A neat new feature is the sample phone number for each country.

The Membership Process:
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 or editing an existing member, 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 **16**).

- 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 her/him a unique email address*, using a slight trick*:
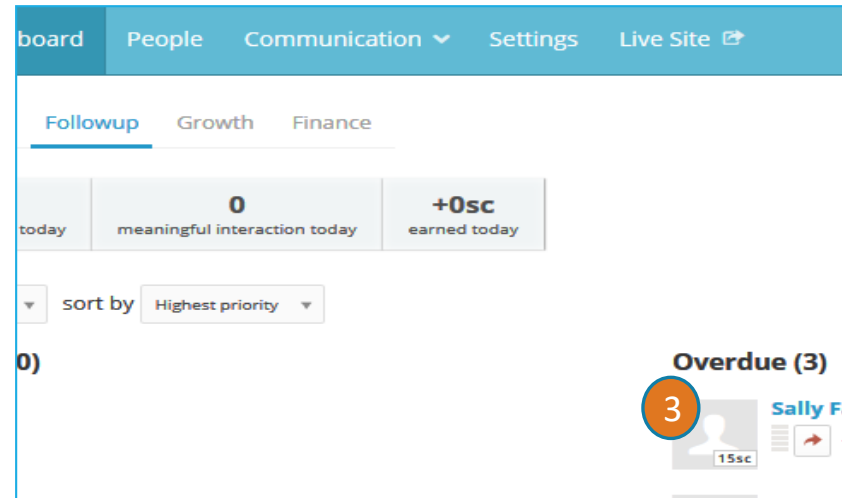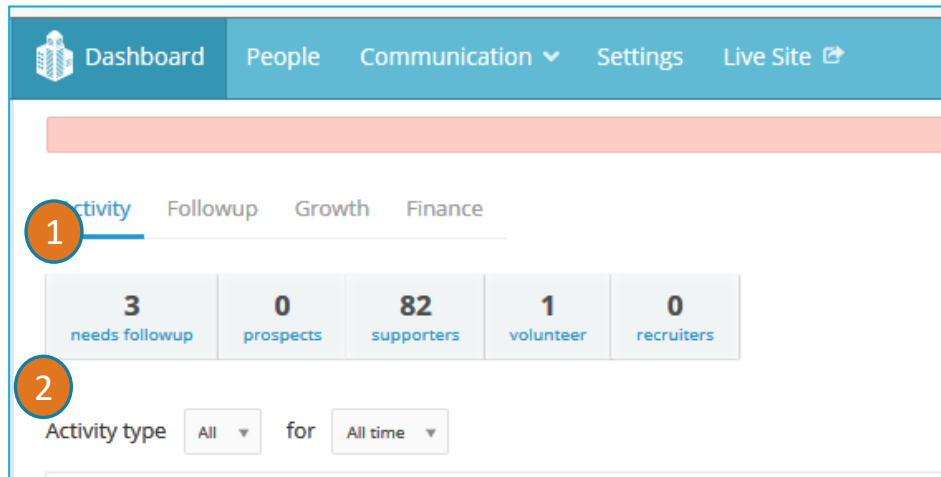
Example:
Existing member's address: Alreadymember@gmail.com
New member: Alreadymember**+shared1**@gmail.com
Second new member: Alreadymember**+shared2**@gmail.com

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

How to see the list of new members needing approval or other followup
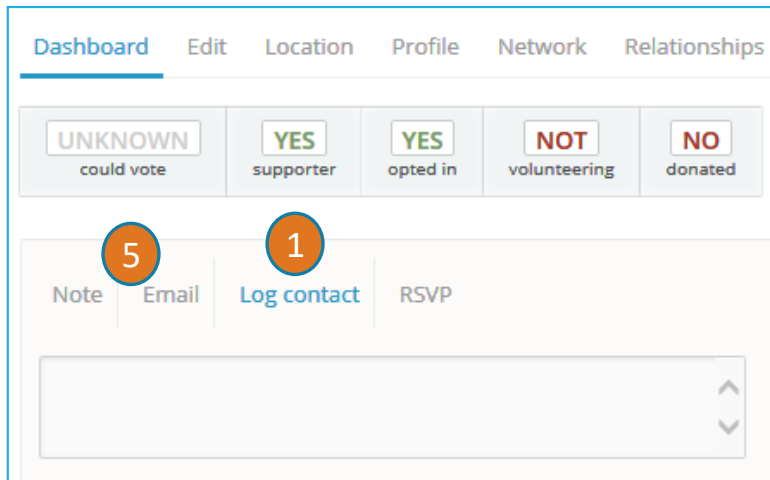

1. On the Dashboard click the Activity tab to see the list of people who need a followup.

2. Click the needs followup 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 filter for the type of follow-up needed: Open the 'All Types' box, then select Verify and Approve New Member
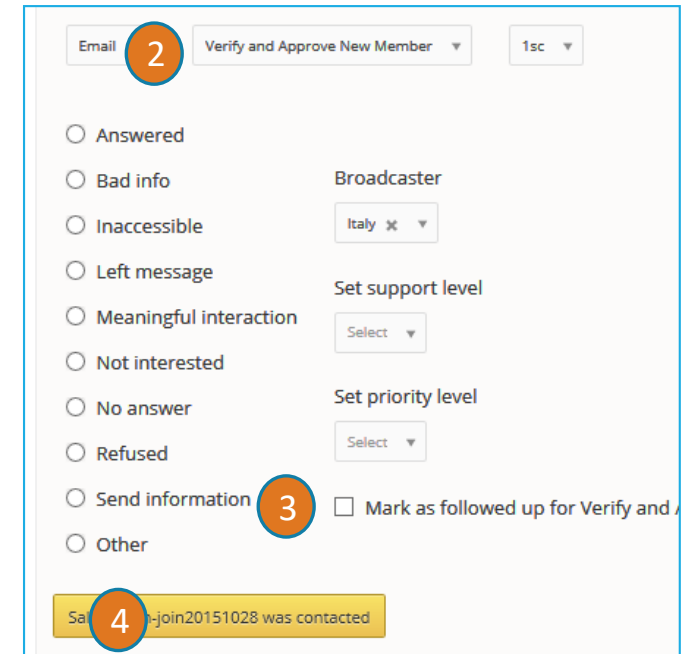
The Membership Process:
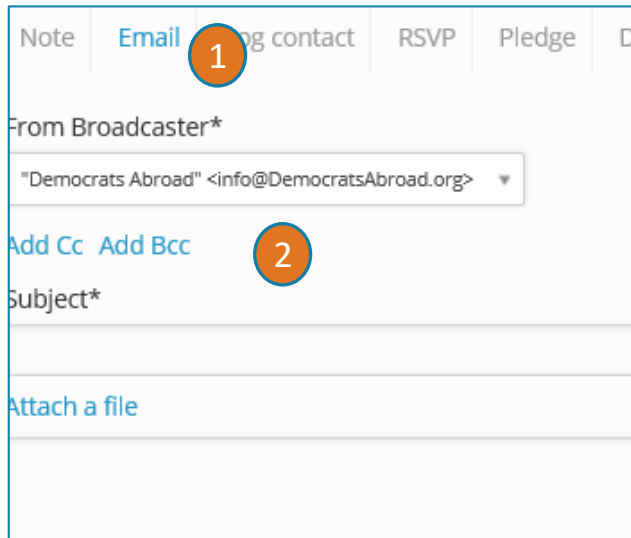# How to Approve a New Member

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

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

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

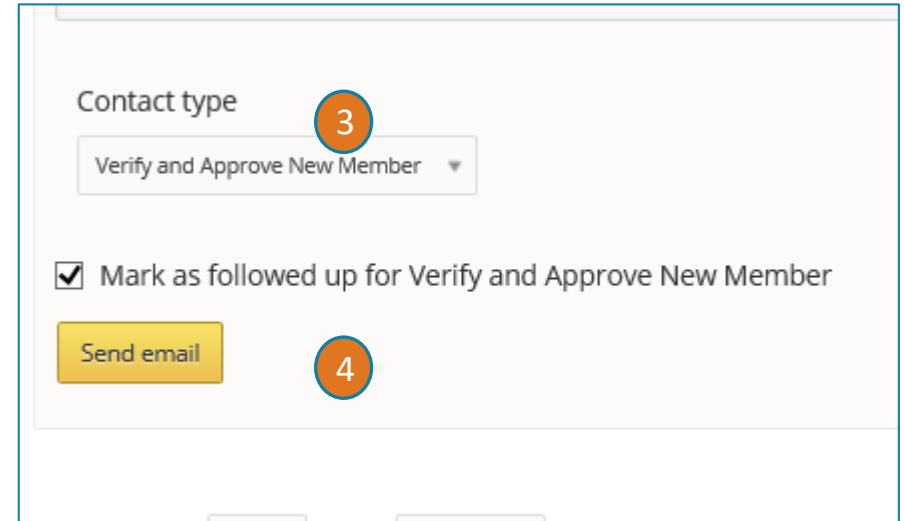5. **See the next slide on how to Approve and Welcome a new member in just one step**

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.

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

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

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

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"

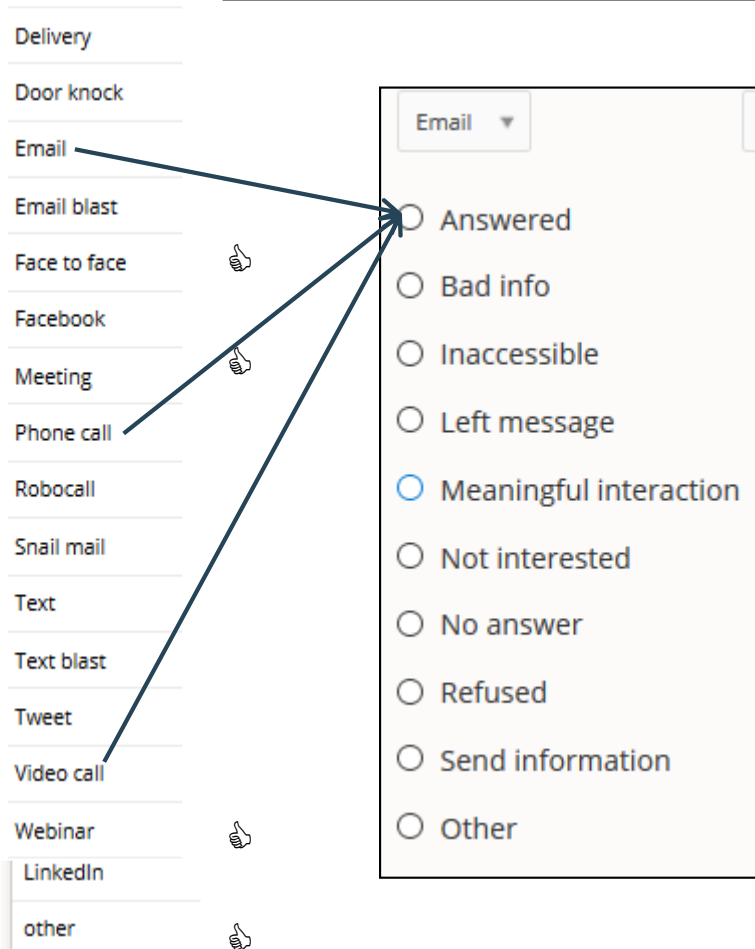4. Click the yellow button to send the Email to Approve the new member.

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

1. Use Log Contact to confirm that someone is still a member living in your country.
2. Open the contact type and select "Verify Still Living in Country"
3. Click the yellow button to confirm the contact with the member.

- The **Date last verified** is set or updated when a member joins, uses VotefromAbroad, verifies themselves, or when someone else (= you the admin) verifies them.

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

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

- "Expired members" 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

Delivery

Door knock

Email

Email blast

Face to face 👍

Facebook

Meeting 👍

Phone call

Robocall

Snail mail

Text

Text blast

Tweet

Video call

Webinar 👍

LinkedIn

other 👍

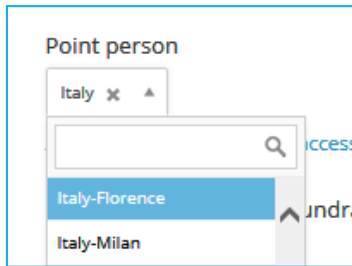| Email ▼ |
| --- |
| ○ Answered |
| ○ Bad info |
| ○ Inaccessible |
| ○ Left message |
| ○ Meaningful interaction |
| ○ Not interested |
| ○ No answer |
| ○ Refused |
| ○ Send information |
| ○ Other |

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 is more interactive the dates ARE updated: Other, Face to Face, Meeting, Webinar, Facebook

- 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. This is a good way to provide more precise information, rather than simply 'other'

- To check: Go to Edit/Memberships. The Expires on date should be 4 years from today's date:

Membership	Status	Expires on	Dues amount
Verified Member of DA	✔ active	August 19, 2021	Free

A couple things you can do on the Edit tab

Dashboard   Edit   Location

Point person

Italy ✕ ▲

[search box] 🔍   ccess

Italy-Florence

Italy-Milan   undr

To assign your member to a chapter, open the Point Person button and assign her to the appropriate chapter Point Person

Email · Primary
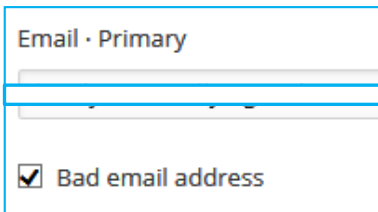
☑ Bad email address

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.

If you need to *delete a member*, scroll to the bottom of the screen, and click Delete Person's Name in the lower right corner

Delete Sal
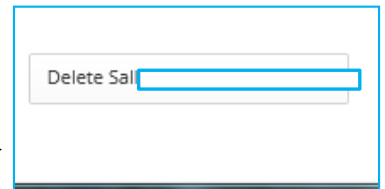
Save person

!!!

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

13

What you can do on the Location tab

Dashboard   Edit   **Location**

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: We don't use the other links.

!!!   Save address

IMPORTANT! Don't forget to scroll to the bottom of the page to save your edits!!!

NEW: Moving a member to a new country

1. *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. **IMPORTANT**: If you are moving someone to the **USA** Alumni Group (at their request) you need to Tag them as "Valid US Alumni"

2. Open the Location Tab and go to the **Home Address** – 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).

3. Open the Country scroll box and select the member's new country.

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 page

1. In the square at the top of the member's record, add the tag XX: Leader (where XX=ISO country code). Double click to select then click Add tags. 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 (on the right side): 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 at the top of your screen. Search for your country to see the result

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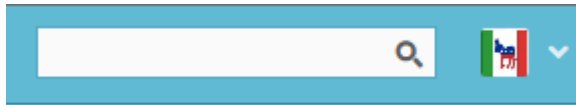
The quickest search is from the box in the upper righthand corner, next to your login icon

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: mylogin@ or @democratsabroad.org or @aol.com
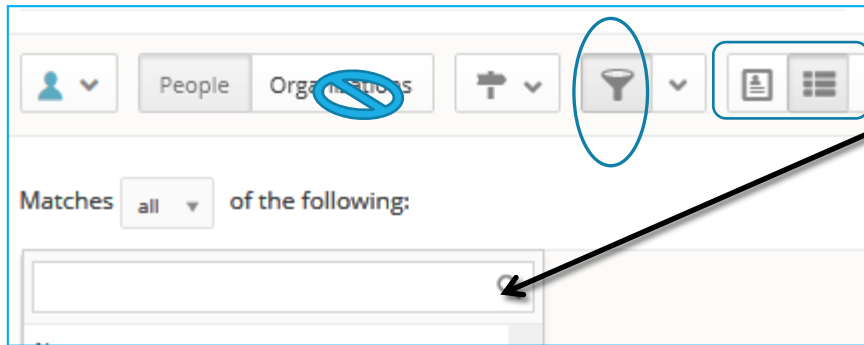
Using the filter to find your members - 1
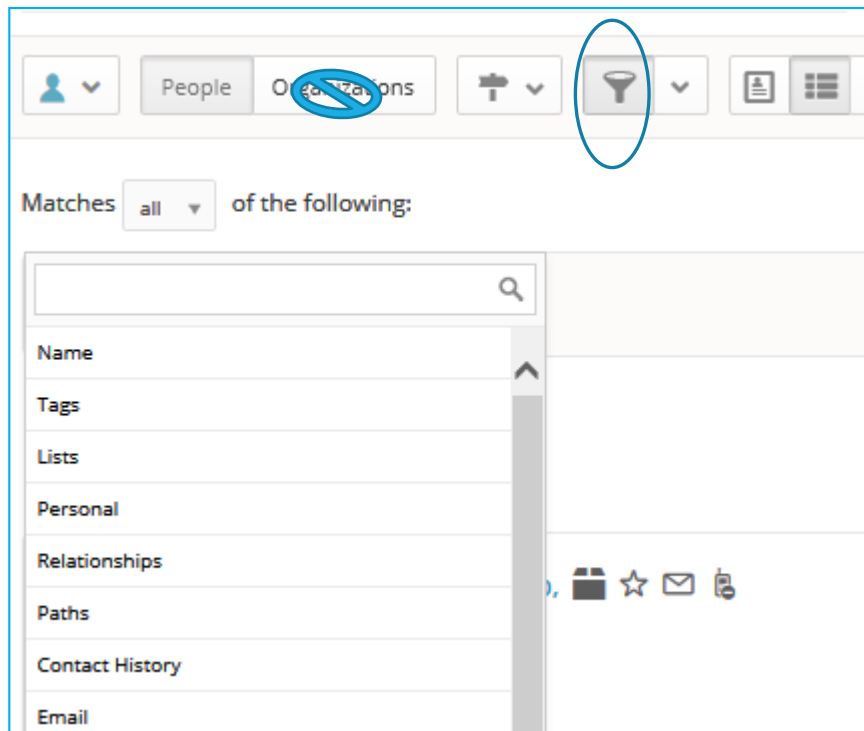
The **Filter** is a very complete Boolean search tool.
Click the funnel to open the tool. Choose all or any, and click Add Criteria to choose first the criteria type, then the actual data itself. Or else enter a field name in the search box.
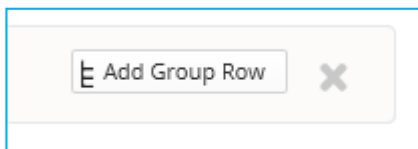
Important note for countries with chapters: Always make sure that you unclick Organizations (to have white background) before you search for your People! If not you risk taking the wrong action with one of your chapter organizations (like assigning one chapter to another chapter's point person)

How to find your members - 2

**The easiest way to enter search criteria is to begin typing the word**

Some helpful searches:

Your whole country: Membership Country (located in Custom Fields)

People in a specific chapter: Point Person

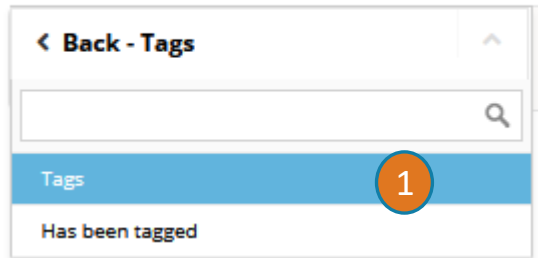Members by voting state: Voting Address State (located in Custom Fields)

Pending tasks: Needs followup

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
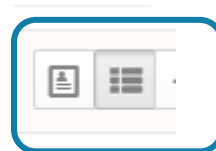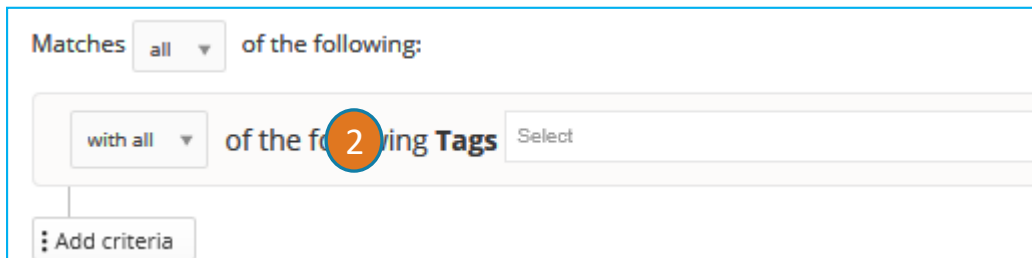
Choose Single-person View or List View

How to find your members - 3

Tags

To search on a certain tag:

1. Click Tags

2. Choose with all or any then click the Select box to display the name of tags

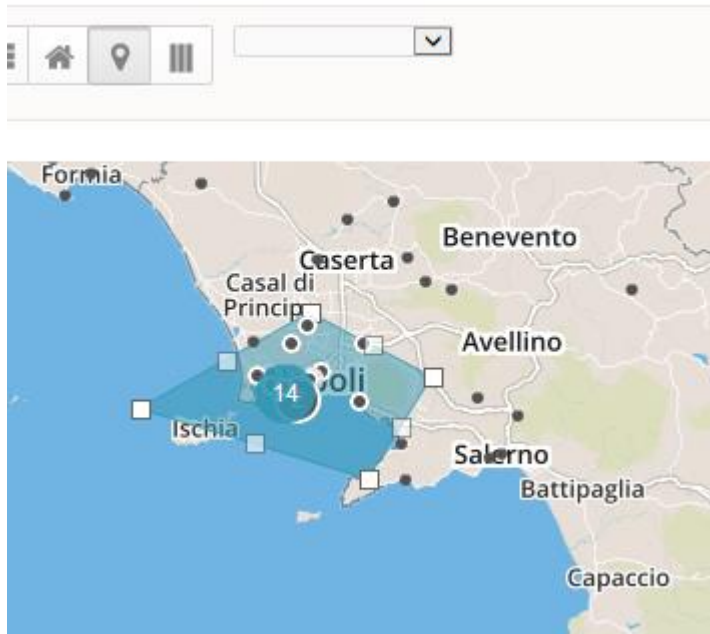# How to lasso in a group of members: Map View

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

See this page for instructions:
http://nationbuilder.com/how_to_use_map_view_and_turf_cut

I've found my people, now what do I do? Lists, Tags, and Saved Filters - 1

LISTS are a relatively static way to organize people within your database intended for <u>one-time use</u>. Any list members who no longer fit the original search criteria are NOT removed, and any 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.

BUT, BUT:

SAVED FILTERS are *dynamic* groupings of people who match certain criteria. Create filters to target people in your database by specific criteria.

Want to learn more? Go to:
http://nationbuilder.com/filters_lists_tags
http://nationbuilder.com/how_to_batch

RULE: Any list tag or filter you create must start with your country code, ex: DE-Berlin Young Dems, NZ-Wellington
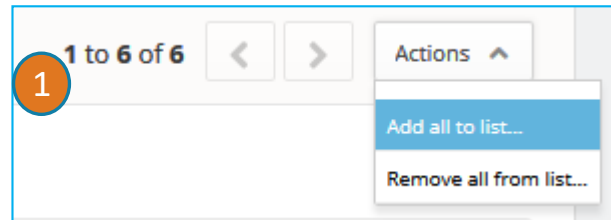
I've found my people, now what do I do?
Lists, Tags and Saved Filters – 2.1

Want to learn more? Go to:
http://nationbuilder.com/filters_lists_tags
http://nationbuilder.com/how_to_batch

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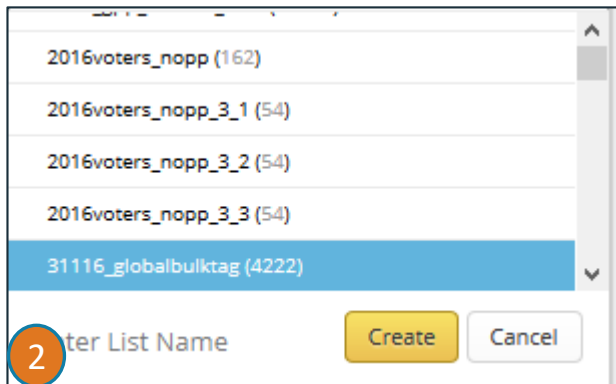
See **the next page for things you can do with a list**.

2. To create a new list, go to the field marked **+ Create List** bottom of the box and enter a name for the new list.

Click the pencil icon to the left of the name to edit the list, and delete it if needed. It's a good idea to delete a list when you're through using it and then create it again the next time.
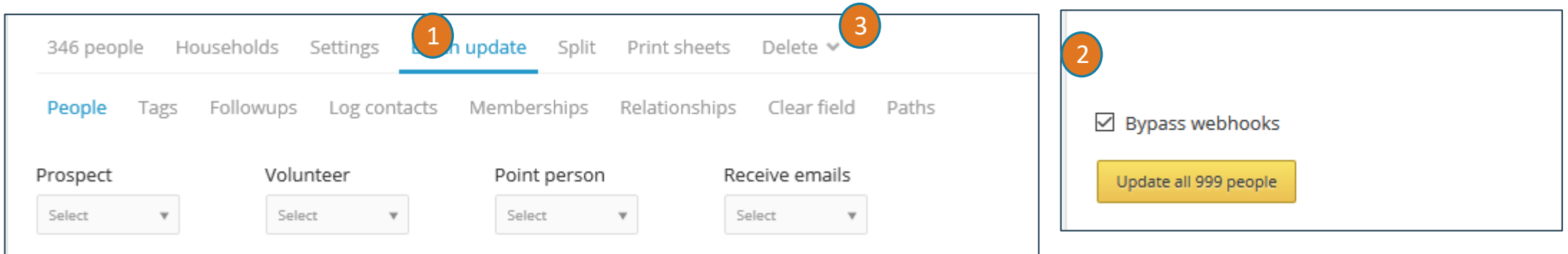
I've got my list, now what do I do?
Lists – 2.2

1. You can choose various actions – the most useful **is batch update** (ex: assign point person, update the Last Verified Date). OR to create call lists (we'll prepare a separate guide on this)

2. After the action scroll to the bottom of the page to click **Update all x** people

3. Open the **Delete link** to delete the list once you're through using it. This link can also be used to remove a series of people – permanently! – from the database, so be careful here!

Want to learn more? Go to:
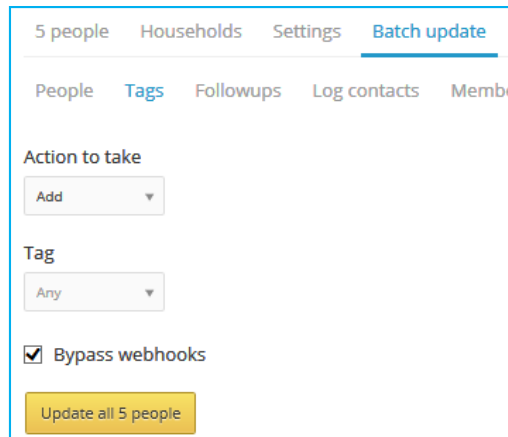http://nationbuilder.com/filters_lists_tags
http://nationbuilder.com/how_to_batch

I've found my people, now what do I do? Lists, **Tags** and Saved Filters - 3

You can tag people individually or else add or remove tags in bulk from a list.

Want to learn more? Go to:

http://nationbuilder.com/filters_lists_tags

http://nationbuilder.com/how_to_batch

I've found my people, now what do I do? Lists, Tags and **Saved Filters** – 4

Filter | Save Filter As...

Save Filter ✕

GR-voted

Save

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

Want to learn more? Go to:
http://nationbuilder.com/filters_lists_tags
http://nationbuilder.com/how_to_batch

+ More possibilities to come!

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