DA Country Committee Membership Management
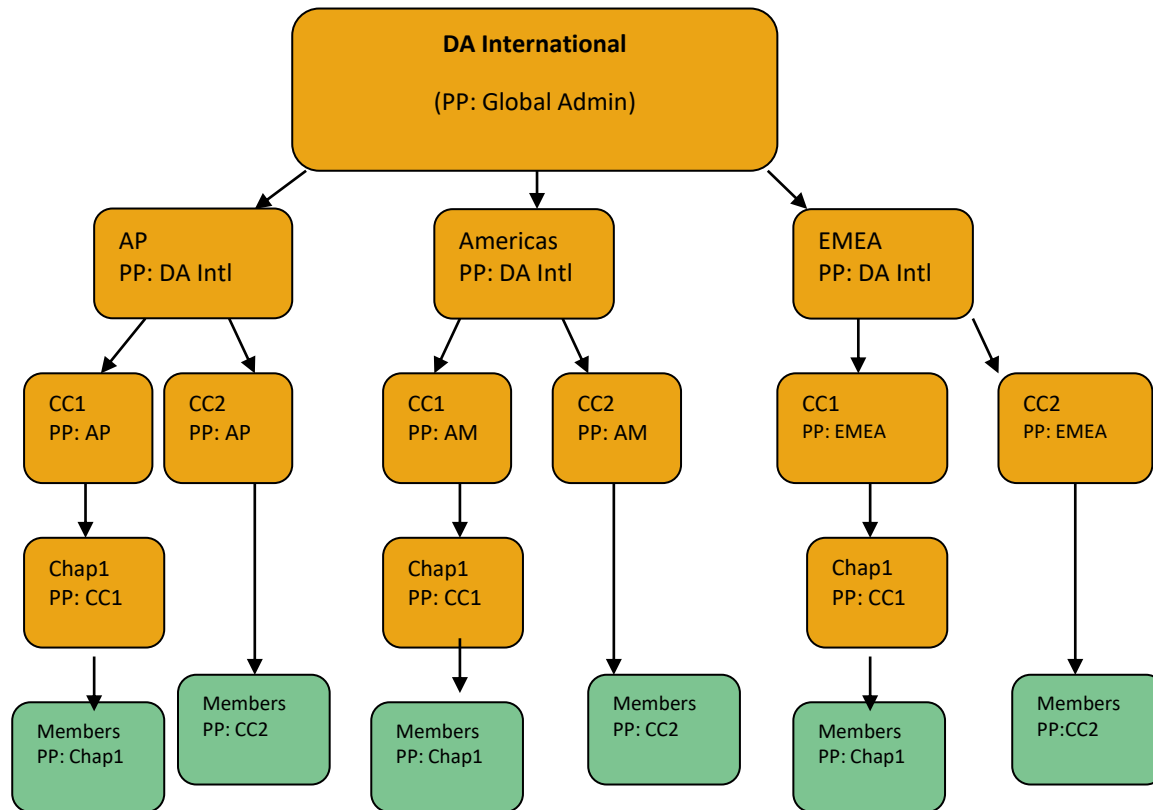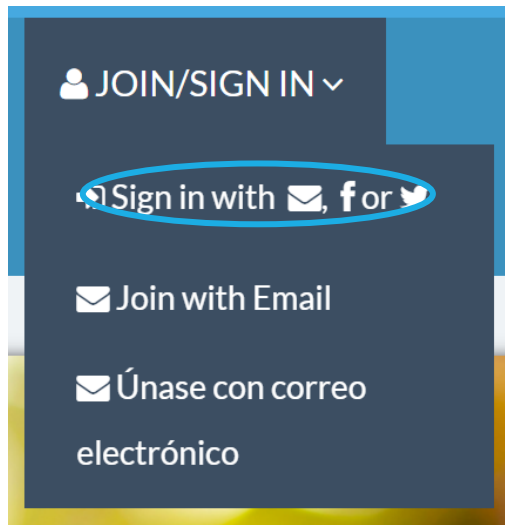
MAY 2022

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 admin is assigned one of four logins allowed for each country or chapter. They do no do membership work with their own personal login.

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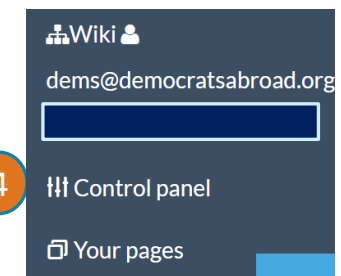
4. After signing in, to access your Control Panel for membership management, mouse over your country name & click the Control Panel link

SIGN IN WITH EMAIL

Email Address

Info-Czech-Republic@democratsabroad.org

Password

••••••••••••

✓ Remember me

SIGN IN WITH EMAIL

Wiki 👤
dems@democratsabroad.org

Control panel

Your pages

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+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

Account settings, the Nation Builder help pages and sign out

Once you've logged in you'll see the main navigation menu on the left side of the page. Here are the key features.

NationBuilder

Dashboard

People

Communication

Settings

Live site
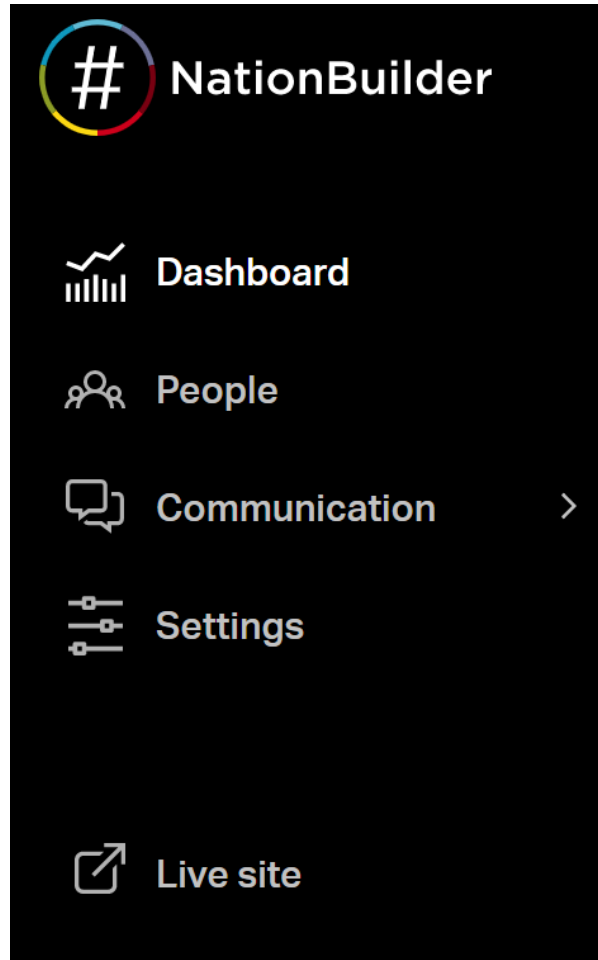
Dashboard – to view your activity, contacts made, and follow-ups needed (slides 6-10)

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 – used by admins certified for emailing

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*

Let us know 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
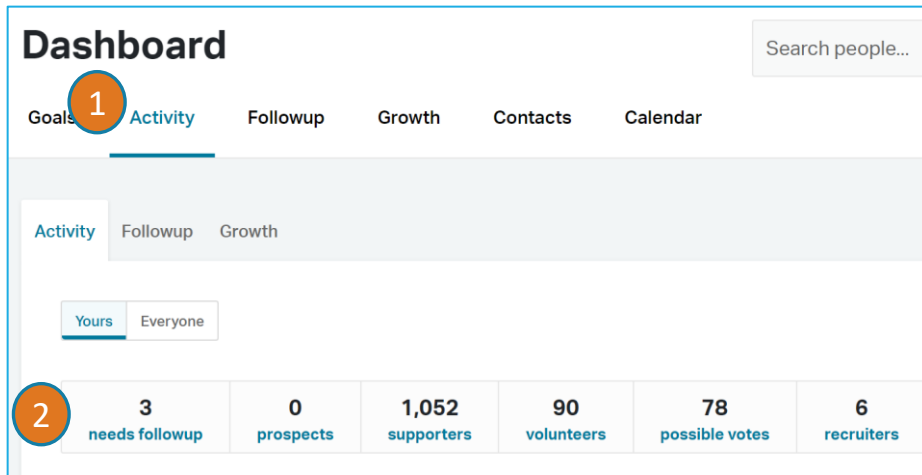
1. On the Dashboard click the Activity tab to see the list of people who need a follow-up. Make sure you have selected the "YOURS" tab to see just our own members.

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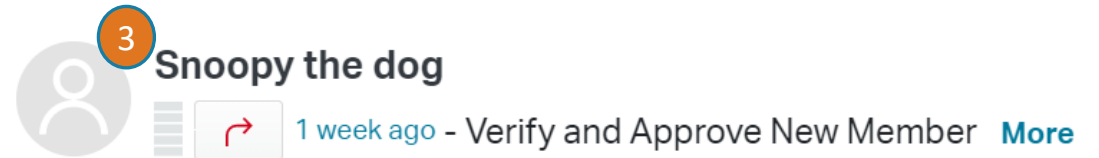
Note: Another way to find new members is to search (filter) for the type of follow-up needed: Open the 'All Types' box, then select Verify and Approve New Member. See slide 20 on filters.

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!
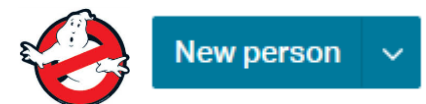
Special case:
Email Addresses: Duplicate or Shared address?

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**:
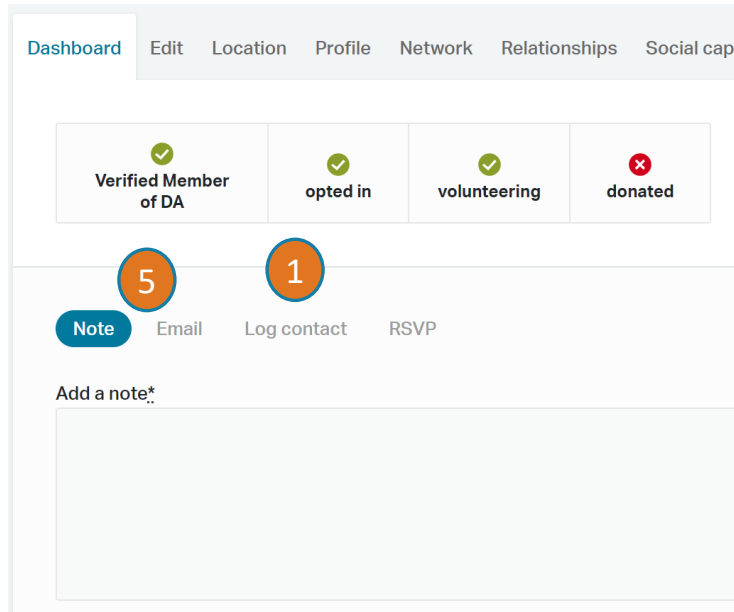
Example:
Existing member's address: Alreadymember@gmail.com
New member: Alreadymember**+shared1**@gmail.com
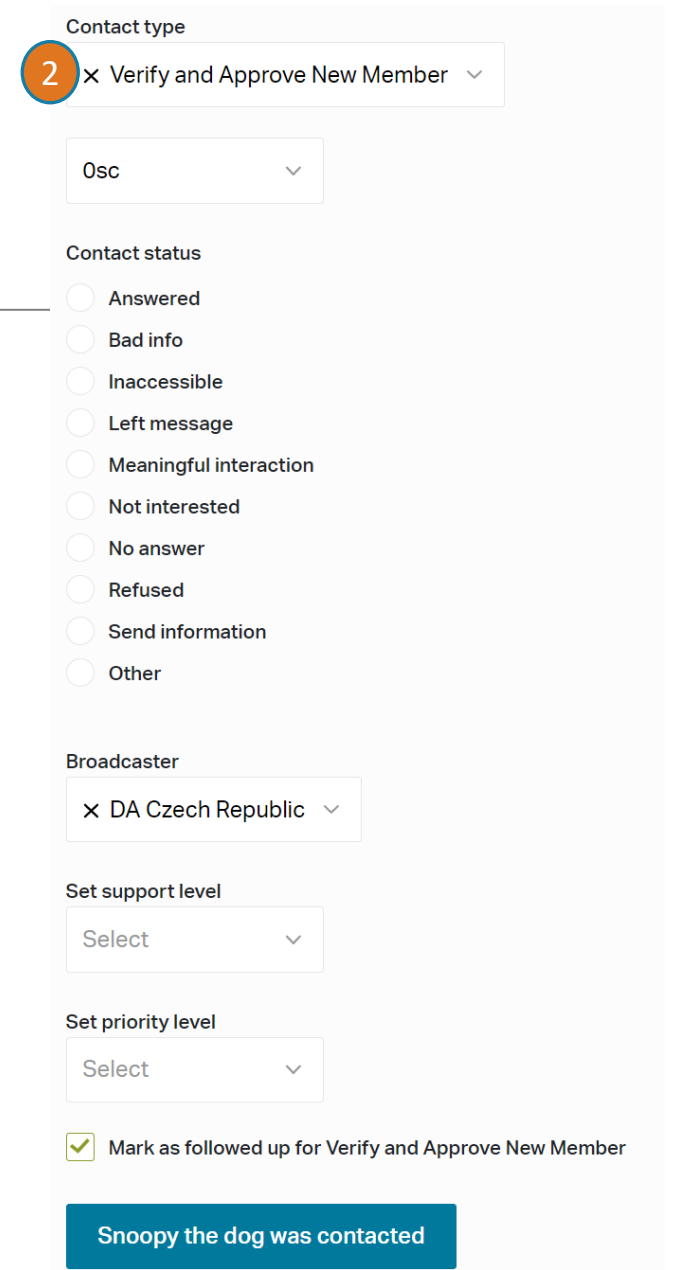Second new member: Alreadymember**+shared2**@gmail.com

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

Dashboard tabs
Dashboard | Edit | Location | Profile | Network | Relationships | Social cap

- ✓ Verified Member of DA
- ✓ opted in
- ✓ volunteering
- ✗ donated

5 **1**

Note | Email | Log contact | RSVP

Add a note*

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.

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**

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

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).

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.

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.

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

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).

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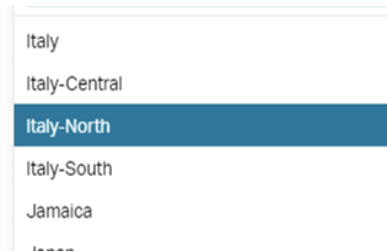
A couple of things you can do on the Edit tab and a thing you shouldn't do

Dashboard | **Edit** | Location

Important note: Be sure to consult the GDPR guide 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
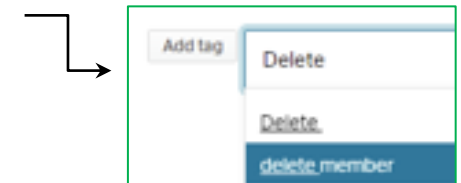
Email

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.
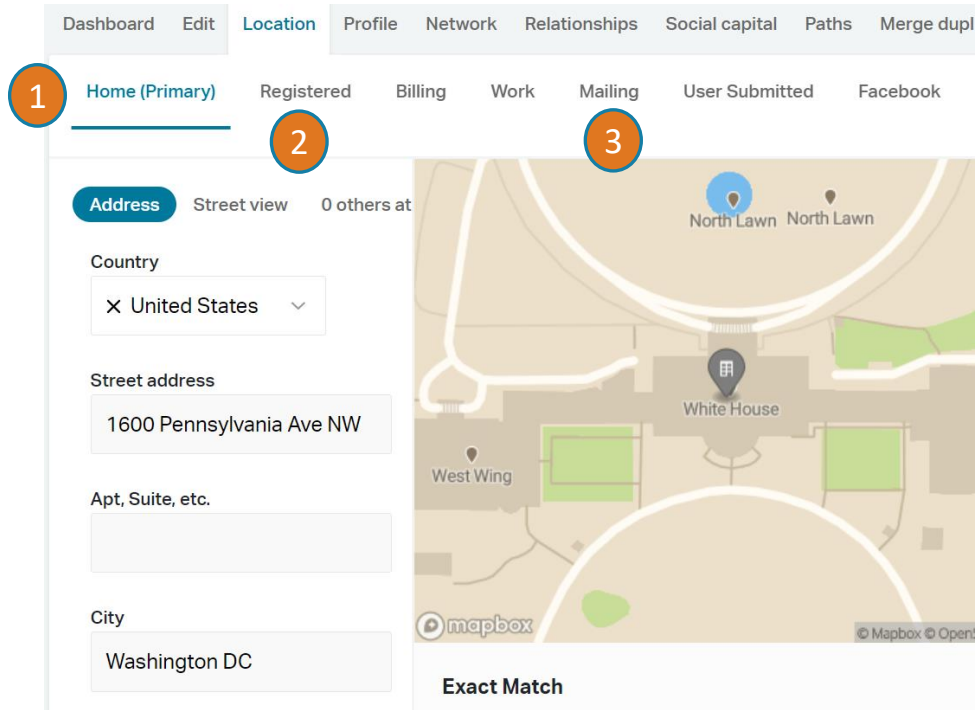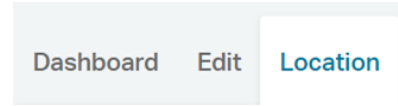
Add tag | Delete
Delete.
delete member

!!! 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.

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

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

1

Dashboard Edit Location Finances Profile Network Re

Home (Primary) Registered Billing Work Mailing

Address Street view 0 others at this address

Country

2 ✕ Zambia ⌄

Street address

dambwa north

3

Apt, Suite, etc.

City

Livingstone

State

Southern

Livingstone, Southern Province

Exact Match

Livingstone, Southern Province

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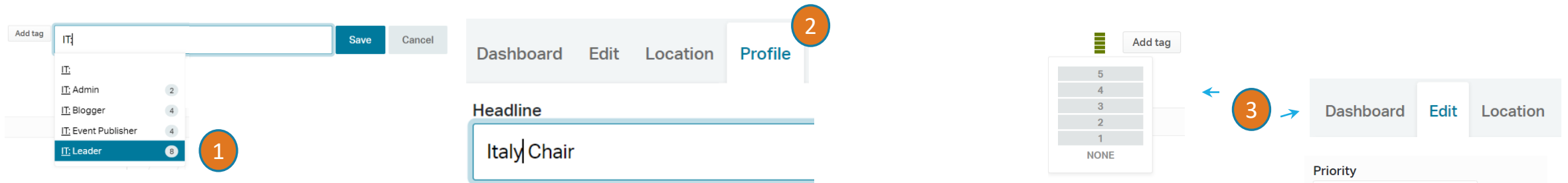
1. In the square just under the member's basic data, add the tag XX: Leader (where XX=ISO country code). Click to select then click Save. In this example IT=Italy

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

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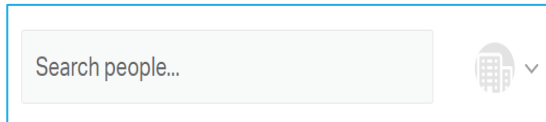
The quickest search is from the box in the upper right-hand corner, next to your login icon

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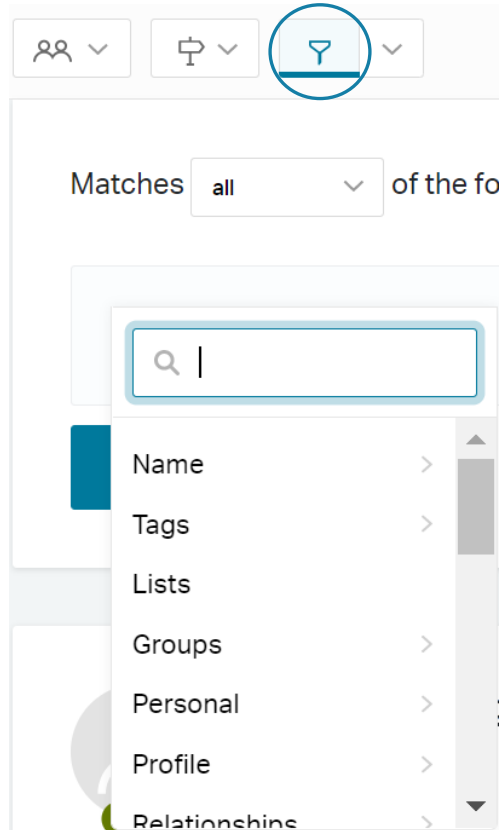
The **Filter** is a very complete Boolean search tool.
Click the funnel to open the tool. Choose all or any, and click Add Criteria to choose first the criteria type, then the actual data itself. Or else enter a field name in the search box.

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)
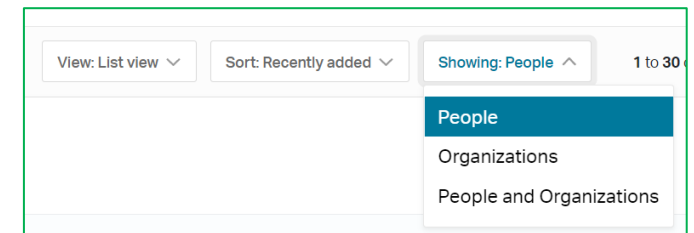
How to find your members - 2

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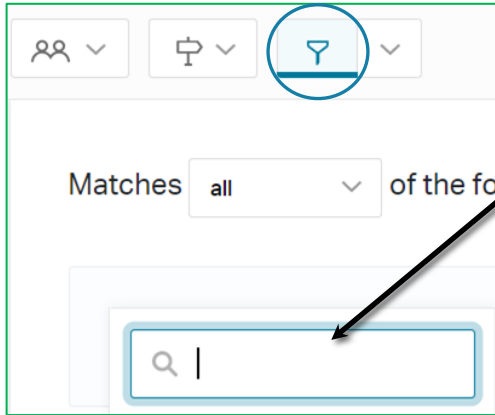
Some helpful searches:

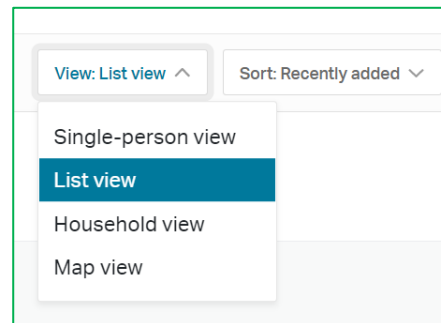Your whole country: <u>Membership Country</u> (located in Custom Fields)
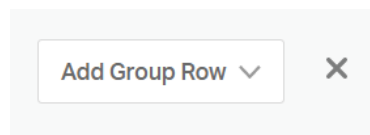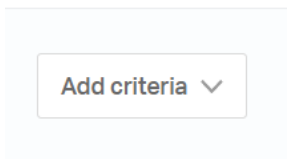
People in a specific chapter: <u>Point Person</u>

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

Pending tasks: <u>Needs follow-up</u>
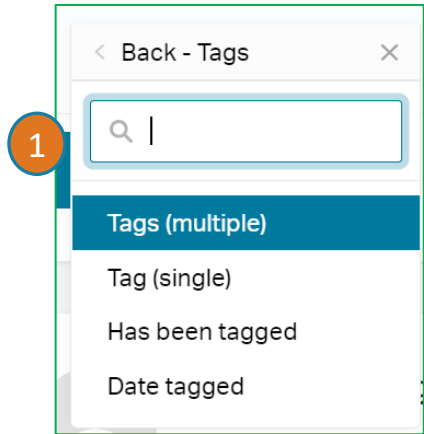
To add criteria click Add Group Row on the right or Add Criteria on the left.
To cancel a criteria click the X on the right

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.
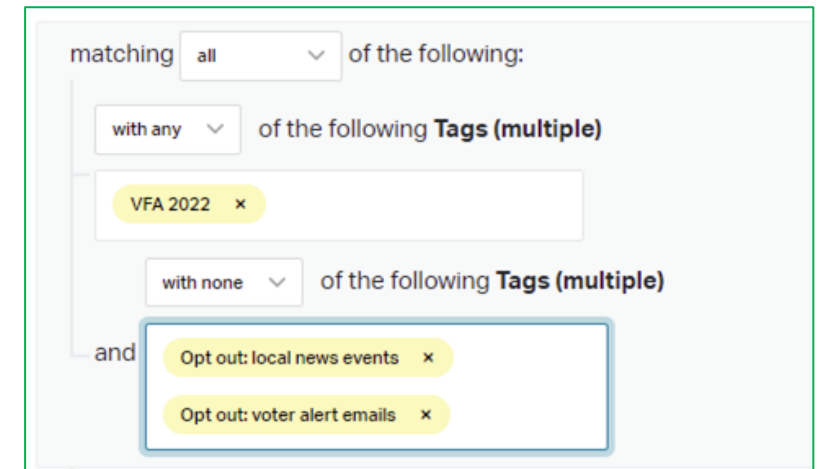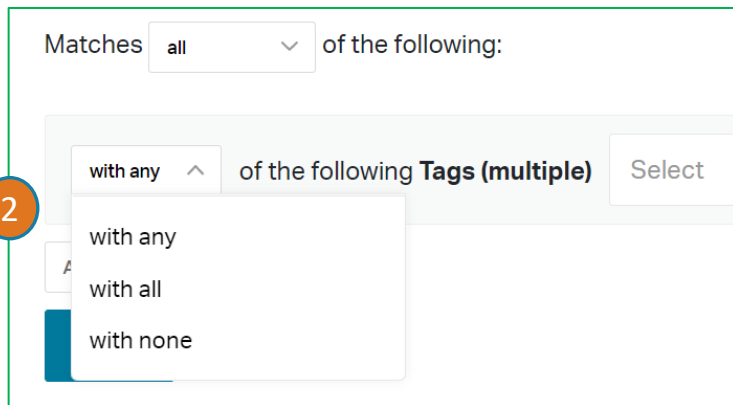
How to lasso in a group of members: Map View
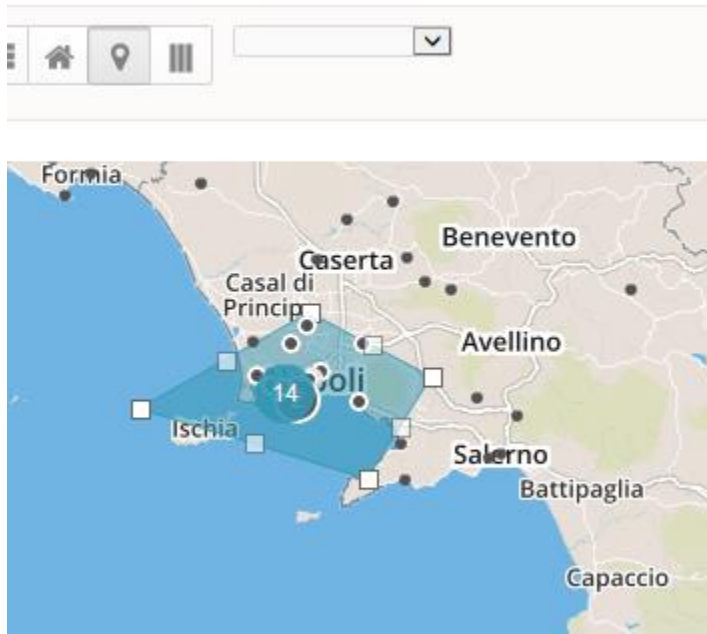
Use Map View to visually locate members living in a specific area, for example for a targeted mailing. Zoom into the area and use turf cut to trace an area. Then you can tag them or add them to a list

For our special Guide on the Map View, click <u>here</u>

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 one-time use or for batch updates. 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 general explanation by Nation Builder (some aspects explained, however, may not apply to Democrats Abroad)
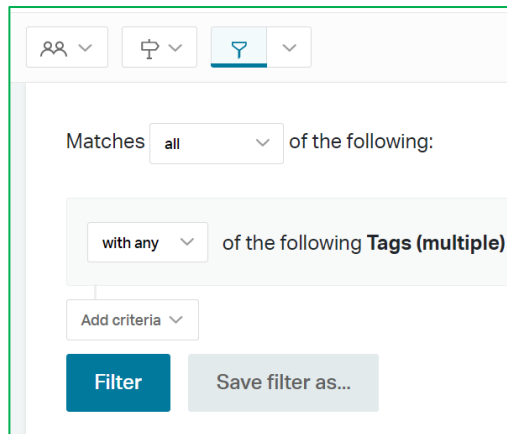
RULE: Any list tag or filter you create must start with your country or group code, ex: DE-Berlin Young Dems, NZ-Wellington, GWC-ERA

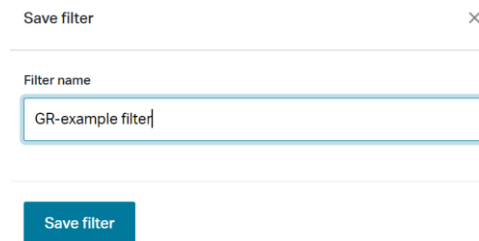# I've found my people, now what do I do?
# *Saved Filters*, Lists and Tags - 1

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
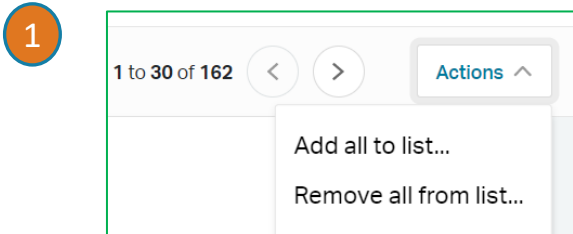
1. Add the members found to a list so you can (for example):
- Send them a targeted email
- Add them to or remove them from a chapter, etc.

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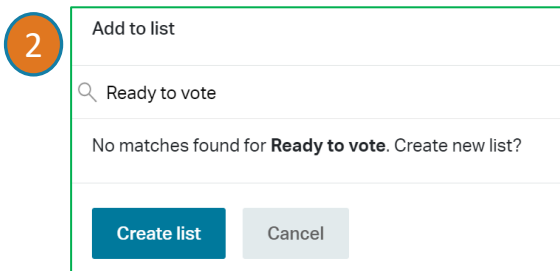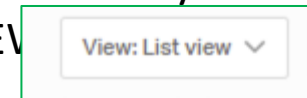
2. To find the list, start typing the name. For a new list, type the name and when prompted click **Create List**
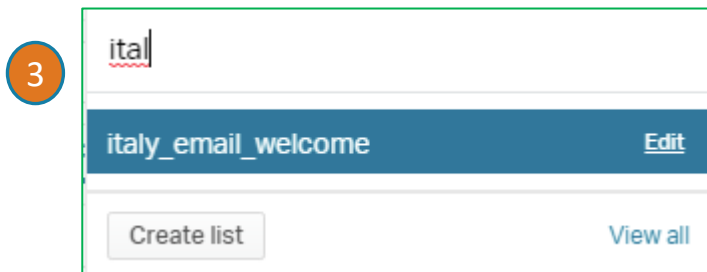
3. To edit - or delete - a list, look for the name then click mouse over the number of people in the list to display EDIT. (You can also create a new empty list here as well)
It's a good idea to delete a list when you're through using it and then create it again the next time.

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

① 1 to 30 of 162 ‹ › Actions ⌃
Add all to list...
Remove all from list...

View: List view ⌄

② Add to list
🔍 Ready to vote
No matches found for **Ready to vote**. Create new list?
Create list   Cancel

③ ital
italy_email_welcome   Edit
Create list   View all

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 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?
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).
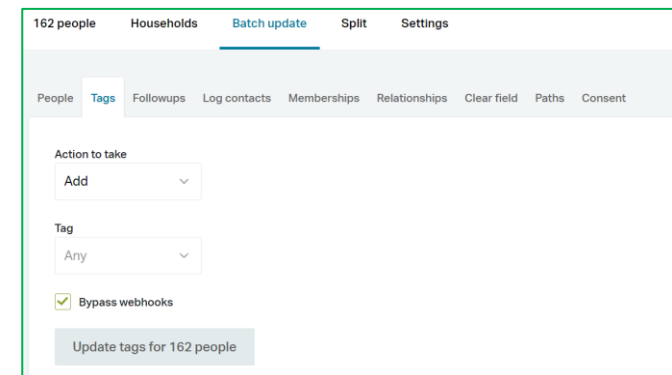
Some tags are also added automatically, like when someone is contacted via CallHub, or uses Vote From Abroad.

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.

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