

WHERE'S WALLY NOW: NATIONBUILDER'S NEW INTERFACE

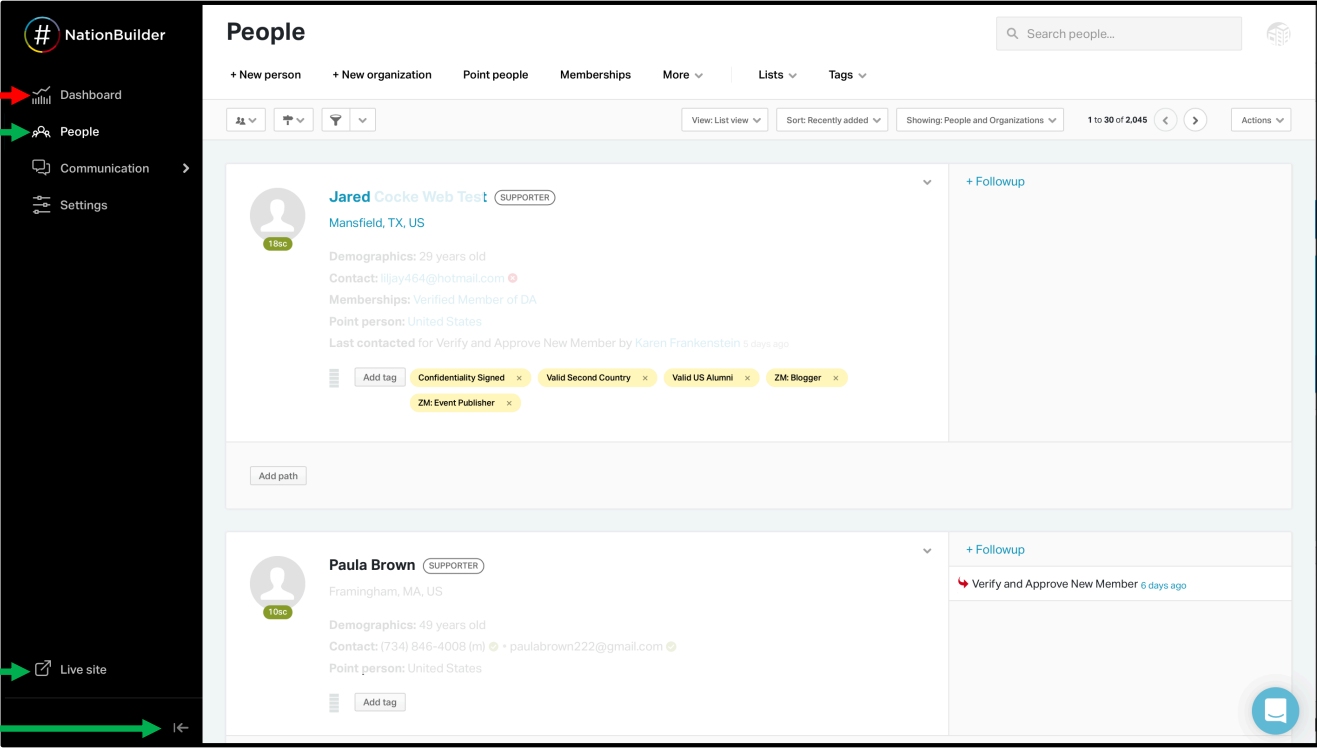
JULY 2019



Introduction to the New Control Panel Look

Most functionality is same, but things are in different places.

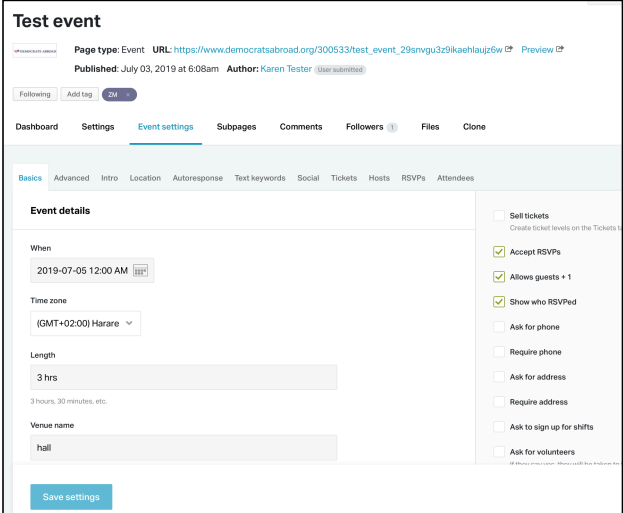
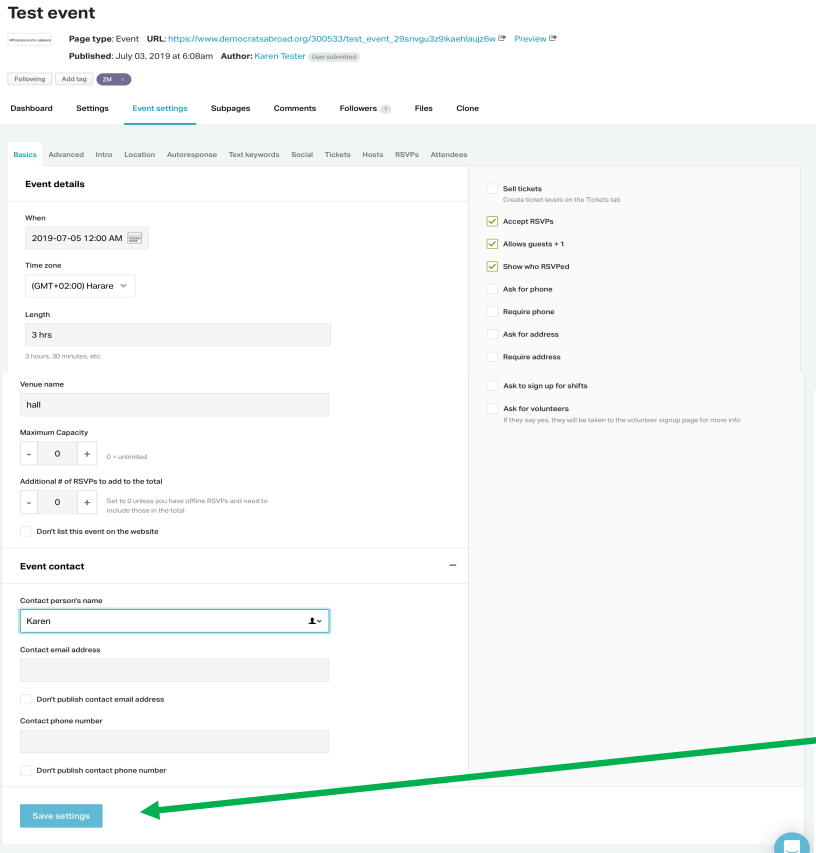
We do not recommend using **Dashboard** anymore.
Please use **People**.



Live Site opens in New Window
Menu Column is retractable

News & Events

News: No changes.
Events: Simplified into 2 columns. Everything that was on the right or the left remains there, but the columns are long and require quite a bit of scrolling.



Note the floating SAVE bar

Email

Broadcaster Name

New Email Blast Button

NationBuilder

Dashboard

People

Communication

DAUS - DA United States

Manage broadcasters

Settings

Communication >

DAUS - DA United States ONLY UNITED STATES CAN SEND

New email blast

Email: info-united-states@democratsabroad.org · 2 email blasts

Text: none · [Add text messaging](#)

Twitter: none · [Connect Twitter account](#)

Facebook: none · [Connect Facebook page](#)

Dashboard Email Settings

Click here to re-authorize with Facebook before posting

for All time

United States started a new email blast from DAUS - DA United States about 11 hours ago

United States started a new email blast from DAUS - DA United States about 11 hours ago

Enter name, not a slug. Slug Automatically Generates. **BE SURE TO USE UNIQUE NAMES.** For Example: "FR July 4 2019" = FR_July_4_2019

+ New blast Blasts Scheduled

You have access to create and edit an email blast, but only a leader or staffer will be able to send it.

1 error prohibited this mailing from being saved

There were problems with the following fields:

- Name has already been taken

Name*

Test Email Short, like "Issues"

has already been taken

Slug*

test_email Just a way to identify the email blast, like: donor_ask1

Description

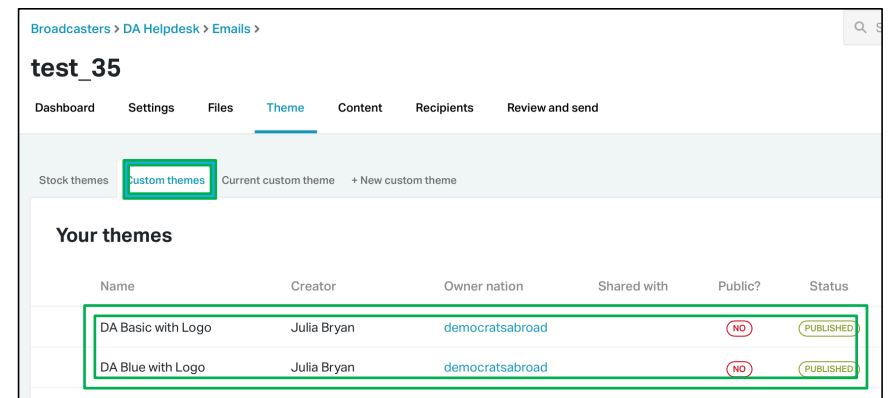
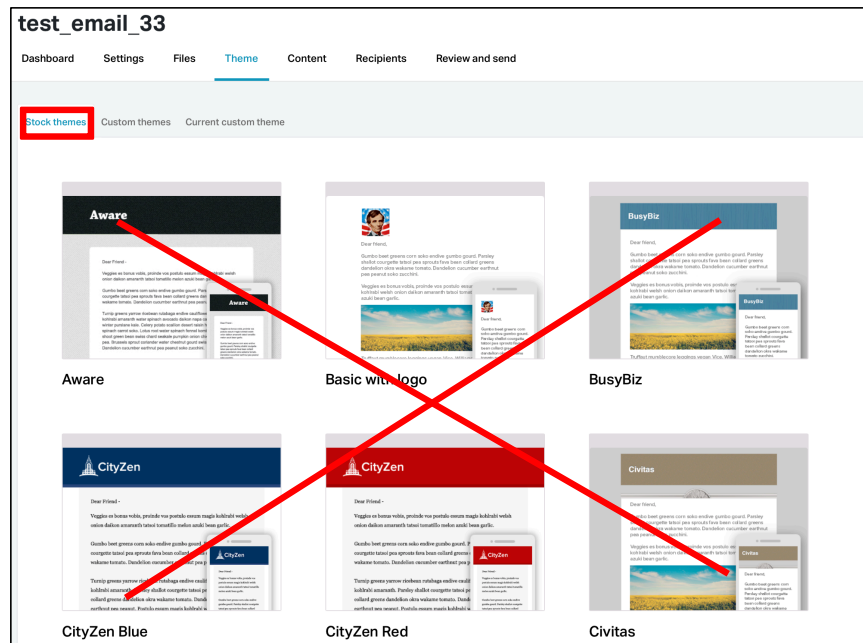
When the recipient clicks on the email, automatically add their email address to any forms

Increases conversion rate, but is confusing if they forward the email since the original recipient's email address will appear in the form

Email - Themes

Beware of stock themes.

Always choose DA Themes.



Email - Editing

Send Test Email
to 1 or more persons
has moved

Full Screen Option
for Editing Windows

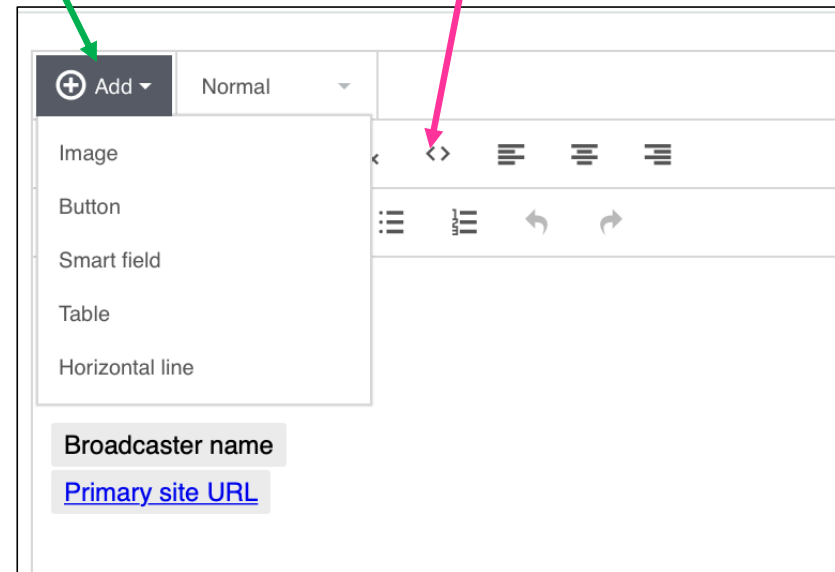
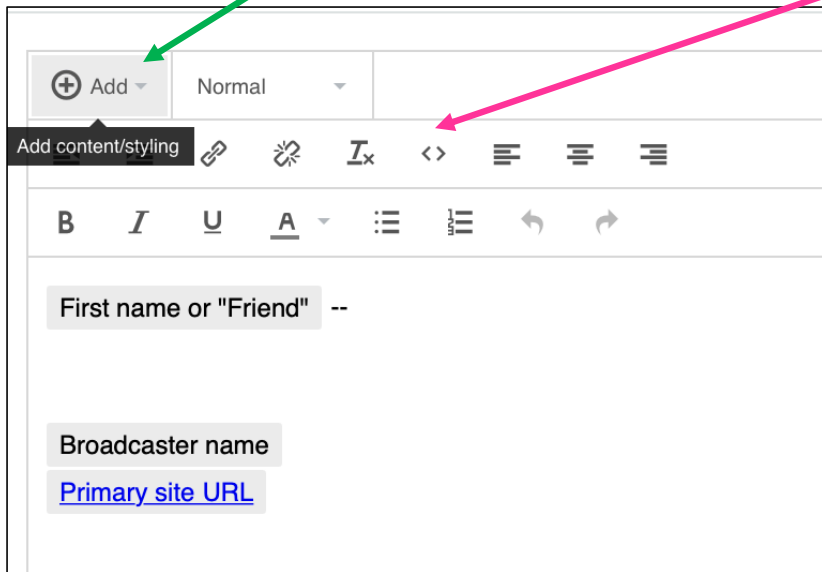
Sliding Resize for
side by side Editing
and Preview Windows

The screenshot shows an email editing interface with a top navigation bar containing 'Dashboard', 'Settings', 'Files', 'Theme', 'Content', 'Recipients', and 'Review and send'. The 'Content' tab is active. Below the navigation bar, there are fields for 'From' (DA Helpdesk) and 'Subject' (Sample Email), each with an '+ Add variant' button. A 'Send test email' button is located on the right side. Below these fields are tabs for 'Desktop', 'Mobile', and 'Text'. The main editing area is split into two panes. The left pane shows a preview of an email with the 'DEMOCRATS ABROAD' logo and text including 'This email was sent to karen.frankenstein@democratsabroad.org.' and 'Paid for by Democrats Abroad'. The right pane shows a rich text editor with a toolbar and a text area containing 'First name or "Friend" --' and 'Broadcaster name Primary site URL'. A green arrow points from the 'Send test email' button to the text 'Send Test Email to 1 or more persons has moved'. Another green arrow points from the 'Full Screen Option for Editing Windows' text to a full-screen icon in the top right of the editor. A third green arrow points from the 'Sliding Resize for side by side Editing and Preview Windows' text to a vertical resize handle between the two panes.

Email - Editing

Add Pictures, Buttons, and More
MOVED HERE

HTML Editor is still here too!



Email Recipients

Choosing your Recipients is now the penultimate step.

The screenshot shows a web interface for managing an email campaign. At the top, there is a breadcrumb trail: "Broadcasters > DAUS - DA United States > Emails >". To the right of the breadcrumb is a search bar with the placeholder text "Search people...". Below the breadcrumb, the title "test_email_33" is displayed. A navigation menu includes "Dashboard", "Settings", "Files", "Theme", "Content", "Recipients" (which is highlighted with a blue underline), and "Review and send".

On the left side, there are two sections of radio button options:

- Send to:**
 - Supporters
 - Prospects
- Matching:**
 - List
 - Tags
 - Filter
 - All

On the right side, a summary box states: "Will send to 2,030 of 2,044 people". Below this, it notes "14 people don't have email addresses, or have opted out." and "Will only send to people that are assigned to United States".

Below the summary box is a table of recipients:

Michael Michener	mvmichener@yahoo.com ✓
Steven Justice	sjartdesign@aol.com ✓

Membership - Views

The screenshot shows the NationBuilder 'People' management interface. The left sidebar contains navigation options: Dashboard, People, Communication, and Settings. The main content area is titled 'People' and includes a search bar, navigation tabs for '+ New person', '+ New organization', 'Point people', 'Memberships', 'More', 'Lists', and 'Tags', and filter controls for 'View: List view', 'Sort: Recently added', and 'Showing: People and Organizations'. A member profile for Elisabeth Stevens is displayed, with a dropdown menu for actions including '+ Followup' and 'Verify and Approve New Member Today'. Annotations include: red boxes around '+ New person' and '+ New organization' with the text 'Do Not Use'; green arrows pointing to the search bar and the dropdown menu with the text 'Use me!'; a red arrow pointing to the 'Actions' dropdown with the text 'Commands unavailable but visible'; and green text 'Views have moved' and 'Go directly to Edit WARNING: Easy Delete!' with a green arrow pointing to the dropdown menu.

Do Not Use

Use me!

Commands unavailable but visible

Views have moved

Go directly to Edit
WARNING: Easy Delete!

Membership - Contact

More Scrolling!!!

Email to members remains the same

Elisabeth Stevens (SUPPORTER)
293 W End Ave, New York, NY 10024, United States
Add background...
Contact: divinetta+9876@gmail.com
NationBuilder ID: 307417
Point person: United States

opted in | volunteering | donated

Note | Email | **Log contact** | RSVP

Note

Method: Email
Contact type: Verify and Approve New Member

Notes box remains in this view

Method: Email
Contact type: Verify and Approve New Member
1sc
Contact status: Answered, Bad info, Inaccessible, Left message, Meaningful interaction, Not interested, No answer, Refused, Send information, Other
Broadcaster: Select
Set support level: Select
Set priority level: Select
Mark as followed up for Verify and Approve New Member
Elisabeth Stevens was contacted

Membership – Tags

Easier to create BAD TAGS

Don't forget to DATE new tags "19-Jul4-Paris"

BAD TAGS:

- Incorrect Capitalization & Spelling
- NO # at end (this shows how many people have the tag)

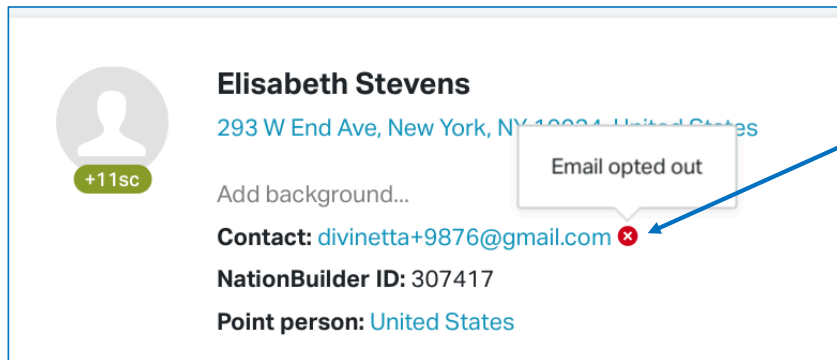
Existing Tag: Has # at end


The screenshot shows a user profile for Elisabeth Stevens, a supporter, with contact information and a NationBuilder ID. A tag creation interface is open, showing a search for 'ch: l' and a list of existing tags. Annotations include:

- A red arrow pointing to the 'ch: l' input field with the text 'Only PRIMARY Information is shown in preview'.
- A red arrow pointing to the 'ch: l' tag in the list with the text 'BAD TAGS: Incorrect Capitalization & Spelling'.
- A red arrow pointing to the 'ch: l' tag in the list with the text 'BAD TAGS: NO # at end (this shows how many people have the tag)'.
- A green arrow pointing to the 'CH: Leader' tag with the text 'Existing Tag: Has # at end'.
- A green arrow pointing to the 'CH_zurich: Leader' tag with the text 'Existing Tag: Has # at end'.
- A green arrow pointing to the 'DE-Munich: Leader' tag with the text 'Existing Tag: Has # at end'.
- A green box around the 'Show all tags' button with the text 'Check ALL Tags!'.

Membership – Email Badges

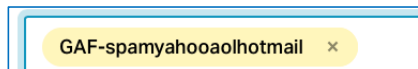
You will now see contact badges – Green checkmark for good email, red X for unsubscribed, “Bouncing” or “Bad” badges – also in the Email Blast Recipients panel.




Elisabeth Stevens
293 W End Ave, New York, NY 10001 United States
+11sc
Add background...
Contact: divinetta+9876@gmail.com 
NationBuilder ID: 307417
Point person: [United States](#)

Hover Mouse for info

Email opted out












GAF-spamyahooaolhotmail 

See this tag? Ask Member for new email address.

Review and send

Will send to 376 of 935 people
559 people don't have email addresses, or have opted out.

C.J. MinsterCheng	cj@nationbuilder.com 	
Kattie Spencer	ezequiel@leuschkejohnson.net 	
Mrs. Kyle Wisozk	clotilde@wisoky.org 	
Aiden Schmidt	arvel.batz@boyle.name 	
Rae Howell PhD	emerson_pfannerstill@rohan.net 	
Kayley Collins	patience@kilback.biz 	
Mr. Alvah Brekke	breana@pagac.biz 	

Membership - Editing

2 LONG
Accordion
columns

Elisabeth Stevens (SUPPORTER)
231 W End Ave, New York, NY 10024, United States
+1156

Add background...

Contact: (212) 362-0220 (m) • divinetta+6789@hotmail.com
NationBuilder ID: 307521
Point person: United States

Add tag: 17CAWebinar, 2018_global_webex_only, 2019 StudentAbroad, Global LGBT Caucus, Global Veterans and Military Families Caucus. **Show all tags**

+ Followup
Verify and Approve New Member Today

Dashboard Edit Location Finances Profile Network Relationships Social capital Paths Merge duplicates

Settings Custom fields Full name IDs Social media accounts Password Memberships

Contact details

Person Organization

Supporter Prospect Non-Supporter

Support level: Select
Inferred support level: Select
Priority: Select

First name: Elisabeth
Middle name: Samantha
Last name: Stevens

Receive emails

Save person Report spam Ban Delete Elisabeth Stevens

Email (Primary): divinetta+6789@hotmail.com

Bad email address

Email 2 Make primary: GoodWitch@GoodWitchCentral.com

Bad email address

+ Add additional email

Mobile number: +1 2123620220

Receive text messages

Bad mobile number

+ Add home phone
+ Add work phone
+ Add best time to call
+ Add fax

Primary address: (home) 231 W End Ave, New York, NY 10024, United States

Edit

Employment +
Demographics +
Political +

+ Add availability
 Fundraiser
 Exempt from donation limits

Point person: United States
Anyone with control panel access can be a point person

Recruited by: Select
Control panel language (beta): Select

Save person Ban Delete Elisabeth Stevens