



“You say good-bye, and I say hello”

- Approving new members*
- Welcoming members new to your country/chapter*
- When a member asks to be moved to a new country*
- When a member asks to be deleted*

JUNE 2022

How to know when you have a new member in your country or chapter



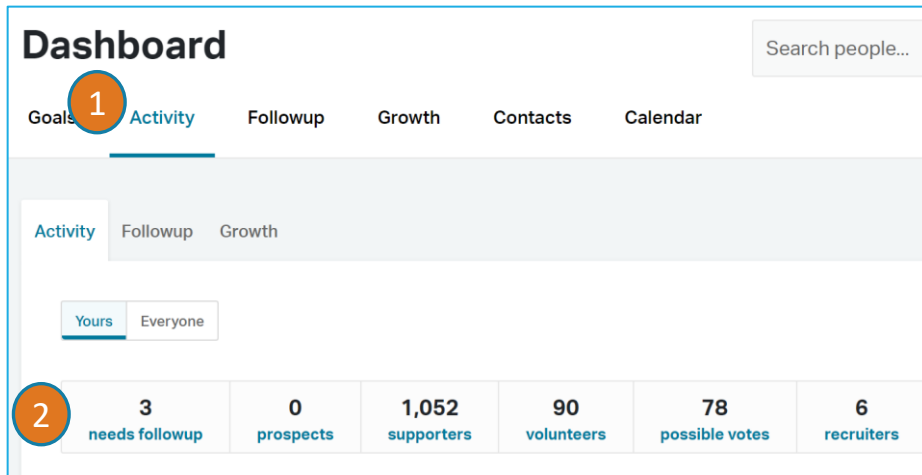
Techie messages from NationBuilder (our database platform):

- 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*



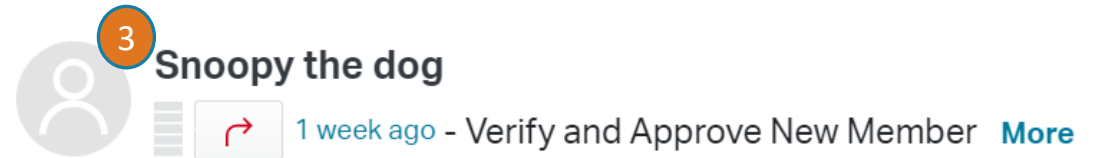
Let us know if you suddenly stop receiving such messages!

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

Overdue **3**



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.

Country level: How to Approve and Welcome a New Member in one step

The screenshot shows an email composition window. At the top, there are tabs for 'Note', 'Email' (highlighted with a blue circle and the number 1), 'Log contact', and 'RSVP'. Below the tabs, the 'From' field is labeled 'From Broadcaster*' and contains the text '"DA Spain" <Info-Spain@democratsabroad.org>'. There is an 'Add Bcc' button below the 'From' field. The 'Cc' field is labeled 'Cc' and contains the email address 'info-es-madrid@democratsabroad.org' (highlighted with a blue circle and the number 2). The 'Subject*' field contains the text 'Welcome to Democrats Abroad Spain!'. Below the subject field is an 'Attach a file' button. The 'Message' field is partially visible at the bottom, containing the text 'Dea' (highlighted with a blue circle and the number 3).

Open the new member's record and check the details (to see if anything is missing, to add the country code to a phone number, etc.)

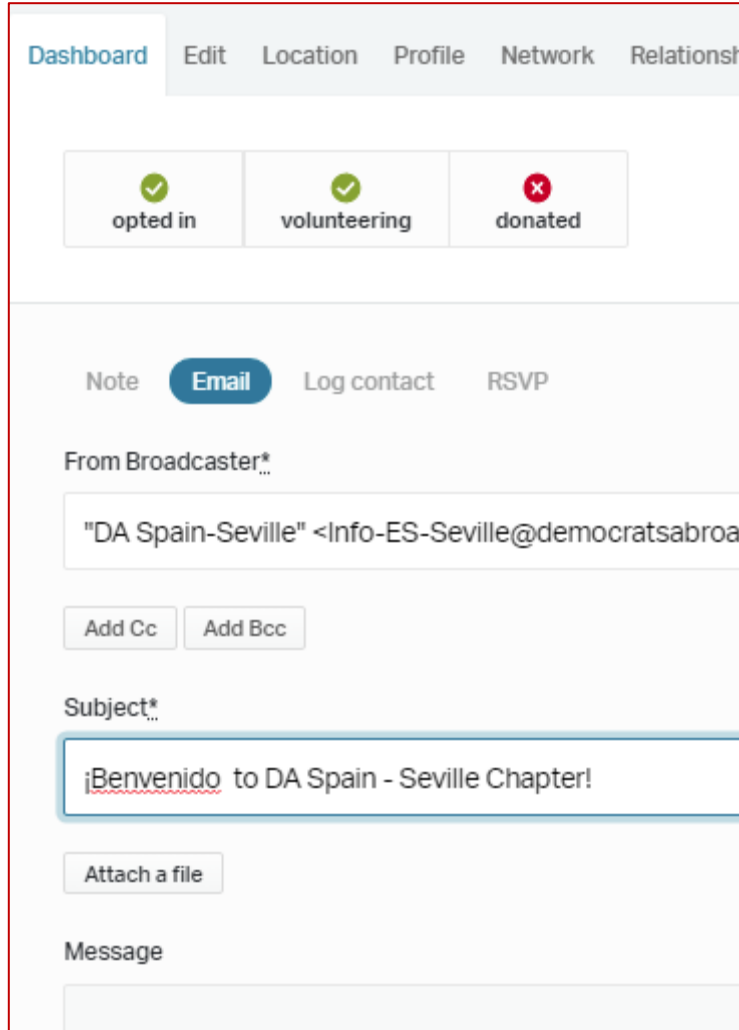
1. Click the Email link in the member's Dashboard.
2. You can send a copy to anyone else of choice (such as the chapter chair).
3. Useful tip: keep a generic message on your desktop to paste in and edit.

The screenshot shows a contact record interface. At the top, there is a 'Contact type' dropdown menu with the text 'Verify and Approve New Member' (highlighted with a blue circle and the number 4). Below the dropdown menu is a checkbox labeled 'Mark as followed up for Verify and Approve New Member' which is checked. Below the checkbox is a yellow button labeled 'Send email' (highlighted with a blue circle and the number 5).

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

Note: this is just a simple ascii message. Contact the [Helpdesk](#) to learn how to send a welcome message from the broadcaster.

Country or Chapter level: Welcoming a member already approved



The screenshot shows a member's dashboard with the following elements:

- Navigation tabs: Dashboard, Edit, Location, Profile, Network, Relationships.
- Member status indicators: opted in (green checkmark), volunteering (green checkmark), donated (red X).
- Action buttons: Note, **Email** (highlighted), Log contact, RSVP.
- From field: "DA Spain-Seville" <Info-ES-Seville@democratsabroa>
- Buttons: Add Cc, Add Bcc.
- Subject field: ¡Benvenido to DA Spain - Seville Chapter!
- Buttons: Attach a file.
- Message body area.

1. Open the member's record.
2. Click the [Email](#) link in the member's Dashboard.
3. You can send a copy to anyone else of choice
4. Write your message.
5. Under Contact type choose "Welcome"
6. Click Send email.
7. If you look on the member's dashboard you will be able to see that she has been welcomed, as well as other traces of her membership history.

Note: Contact the [Helpdesk](#) to learn how to send a welcome message to several people from the broadcaster.

Moving a member to a new country (but not the USA)

Important note: for data privacy reasons, do NOT move someone to a new country based on social media data. You can only move people who inform you /confirm to you that they have moved.

Country

Select ^

Q ken 2

Kenya

Apt, Suite, etc. old street emptied

3

City new city added

State

Zip code

1. **First of all edit or delete any new non-street address data** you have, especially local phone numbers in the former country. 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 **Primary Address** –Choose the new country in the Country scroll box .
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.

NOTE: If you have a cross-border member (ex: a member living closer to a neighboring country and wishing to join your country committee) contact the helpdesk to set this up.



Back in the USA

Note: In general, when people write saying they are back in the USA, it is good to reply asking them if they would like to be moved to the US Alumni group where they will receive global mailings.

Here's the wording of Helpdesk's reply template, if you'd like some inspiration:

Thank you for getting in touch to let us know you've moved to the US.

Before we delete your record, would you like to be added to our alumni group? If we put you in the alumni group, you will no longer get the mailings from the abroad country, but you will still be connected via mailings from the International Democrats Abroad group.

Otherwise, I'm more than happy to go ahead and delete your account - just let me know. If I don't hear back within a week, I'll proceed and delete your record as requested.

Best wishes,



Moving the member's record to the USA group

When someone asks to be added to the Alumni Group, **simply tag them with **Move to US** (respect spacing and uppercase)** and they will be fully processed and moved to the USA within 24-48 hours.

When a member asks to be deleted

- If a person explicitly asks to be deleted from our membership list or has passed away, you must get the member record deleted within a week after notification. This is required by the European GDPR (adopted by DA) and is general good practice.
- To have the member deleted, tag the record with “**delete member**”. Member records with this tag will be processed for deletion within 48 hours. Do not delete them yourself.
- If it’s not clear, write back to the member asking them exactly what they would like: if they wish to remain a member but not receive any emails from DA, if they have moved to another country or back to US (and whether they want to join the US Alumni group)
- But once you’ve done your emailing and phone banking, what are you going to do with those vague cases – such as people who don’t answer their email messages or phone numbers that are no longer in service?

It is not often straightforward when exactly to delete a member, but here are some guidelines based on experience by several long-standing membership managers.



When to contact a global admin

Contact the Global Admin mailbox at 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 admin rights**, use our wiki page:

<http://wiki.demsabroad.org/display/MembDBCnda/DA+Website+and+MembDB+Admin+Requests>