

DA Country Committee Email Blasts - September Update

SEPTEMBER 2018

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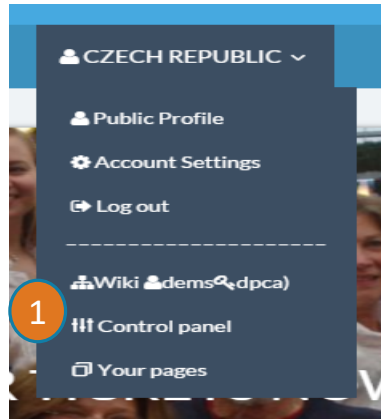
Rules for the emailing admin login

- 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 your 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

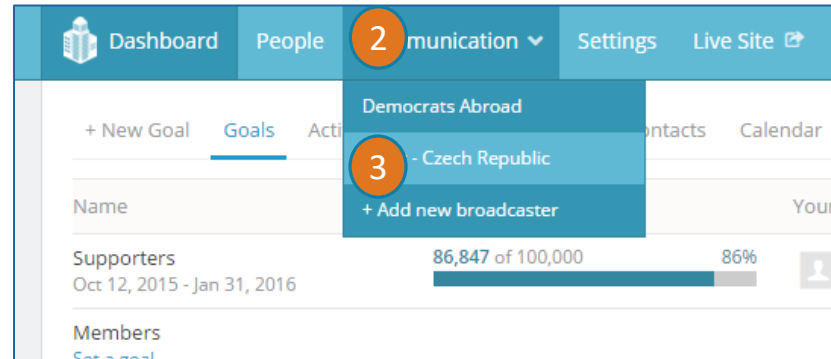
Broadcaster – What's that?

- Broadcasters are the voices who speak publicly on behalf of Democrats Abroad and our country committees. All of our external communications are organized around broadcasters.
- Broadcasters are separate from people or organizations in our database.
- A broadcaster can have several different sender *names*, but will always use the same email address – that of the organization it represents (global, country or chapter)

How to access your Broadcaster



1. Open your tool bar & click “Control panel” to access your main Dashboard

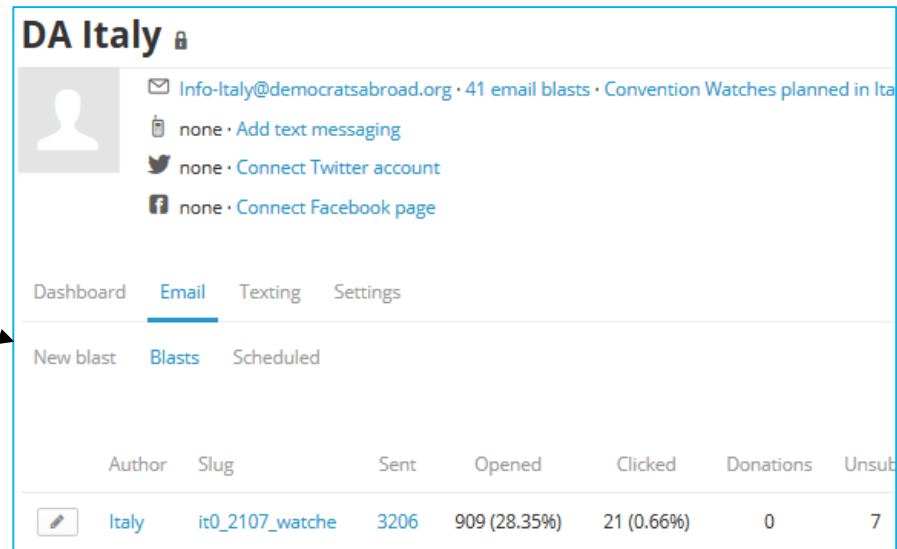
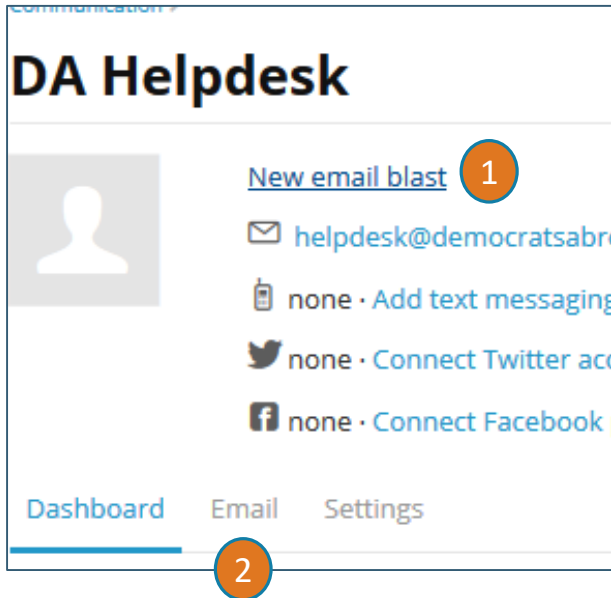


2. Click “Communication” to view broadcaster list.

3. Then click your broadcaster name.

4. If you don't see your broadcaster name in the initial drop-down list, no worry – simply double click 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 either Start a new email blast by clicking “New Email blast” at the top or else you can click the Email link to send a new blast or else review past emails.
Click on highlighted numbers to drill down for more detail (for more information see page 20)

EMAIL BLASTS
Nationbuilder calls emails sent to groups of people “blasts.”

Slugs, Descriptions and Clones

The screenshot shows a web interface for creating a new email blast. At the top, there's a profile picture placeholder and the text "New email blast". Below that, there are links for "helpdesk@democratsabroad.org · 164 emails", "none · Add text messaging", "none · Connect Twitter account", and "none · Connect Facebook page". A navigation bar includes "Dashboard", "Email" (which is active), and "Settings". Below the navigation bar, there are links for "+ New blast", "Blasts", and "Scheduled". The main form has four sections: "Slug*" with a text input containing "HLP_Guide_0909" and a subtext "Just a way to identify the email blast, like: donor_ask1"; "Description" with a text input containing "optional description"; a checkbox labeled "When the recipient clicks on the email, automatically add their" with a subtext "Increases conversion rate, but is confusing if they forward the email since the original recipient's email address will appear in the form"; and "Clone from previous blast" with a dropdown menu showing "Select". At the bottom, there is a yellow button labeled "Create and edit email blast".

1 HLP_Guide_0909
Just a way to identify the email blast, like: donor_ask1

2 optional description

3 Select

4 Create and edit email blast

- 1. SLUG:** Give your new blast a Slug (identifier) line – it needs to be unique across the DA world, and is limited to 30 characters
 1. ALWAYS begin your slug with your country's ISO code (DE for Germany, CA for Canada, etc.)
 2. Add a short chapter identifier (number or letter)
 3. Add the date and if possible a short word
- 2. DESCRIPTION:** Add a Description – it's handy for identifying the blast on your email Dashboard.
 1. Include sender history
 2. Include purpose of email
- 3. CLONE:** You can clone a previous email, for example for reminders or similar emails you send out regularly. Select the Email you wish to clone from the dropdown list.
- 4.** Click "Create and edit email blast" to move to the next screen.

Recipients

The screenshot shows the 'Recipients' tab in the Dynamics 365 interface for an email draft titled 'cz012815sample'. The breadcrumb trail is 'Broadcasters > Chair - Czech Republic > Emails > cz012815sample recipients saved'. The draft is 'Drafted by Chair - Czech Republic to 269 supporters'. The 'Recipients' tab is active, showing options for 'Send to' (Supporters selected), 'Matching' (All selected), and a list of recipients. Three callout boxes are present: 1. 'Send to' section, 2. 'Matching' section, and 3. 'Save and select theme' button.

Dashboard | People | **Communication** | Settings | Live Site

cz012815sample recipients saved

Broadcasters > Chair - Czech Republic > Emails >

cz012815sample

Drafted by Chair - Czech Republic to 269 supporters

Dashboard | Settings | Files | **Recipients** | Theme | Body | Spam Score | Clone | Preview

Send to

Will send to 269 of 273 people

4 people don't have email addresses, or have opted out.

Will only send to people that are assigned to Czech Republic

1 Supporters
 Prospects

2 Matching

List Tags
 Filter All

3 Save and select theme Save recipients

<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	J
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	M
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	H
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	E

1. **Supporters:** supporter = member (this is the default)
2. **Matching:**
All = everyone assigned to you as point person
Tags = members with a particular tag or tags
Filter = meeting the criteria of a saved (dynamic) filter
List = static lists you can create in membership
3. FIRST Click “Save recipients” to save and see your recipients.
THEN Click “Save and select theme” to move on to the next screen.

Recipients for Certain Types of Messages

Messages are obviously never sent out to people who have opted-out of all email blasts, but members also have the right to **opt-out of certain types of messages** (you can see this if you click the link in the opt-out sentence of the email footer).

We've set up Filters to choose your audience for these partial opt-outs.

Country and chapter broadcasters just need to select their Region's filter (European countries = EMEA-1, France, Italy, Switzerland and Africa and Middle East = EMEA-2):

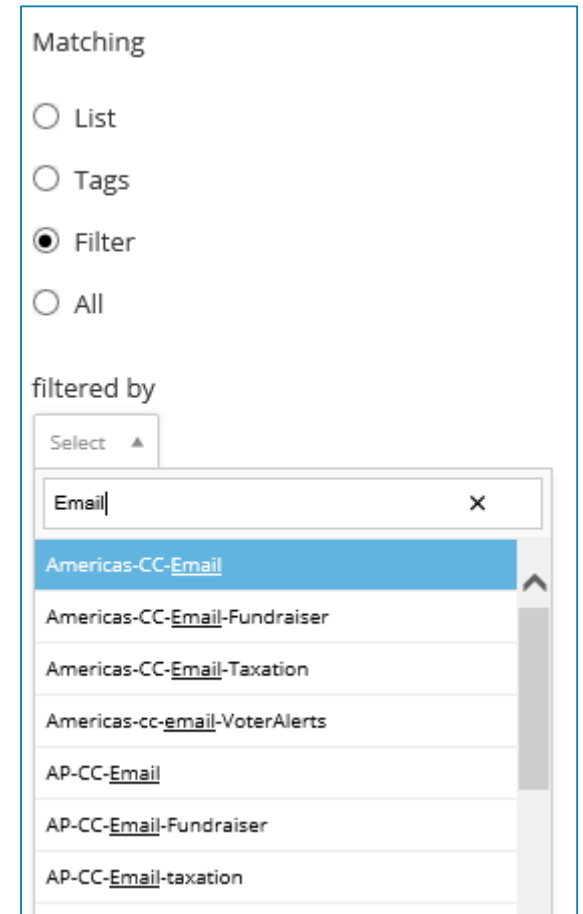
Filter to choose if you are sending a message about:

Fundraising/Donations: Region-CC-Email-Fundraiser

Tax issues (FATCA, etc.): Region-CC-Email-Taxation

Voting information: Region-CC-Email-VoterAlerts

Tip: to find your tag begin typing either Email or Fundraiser, Taxation



Matching

List

Tags

Filter

All

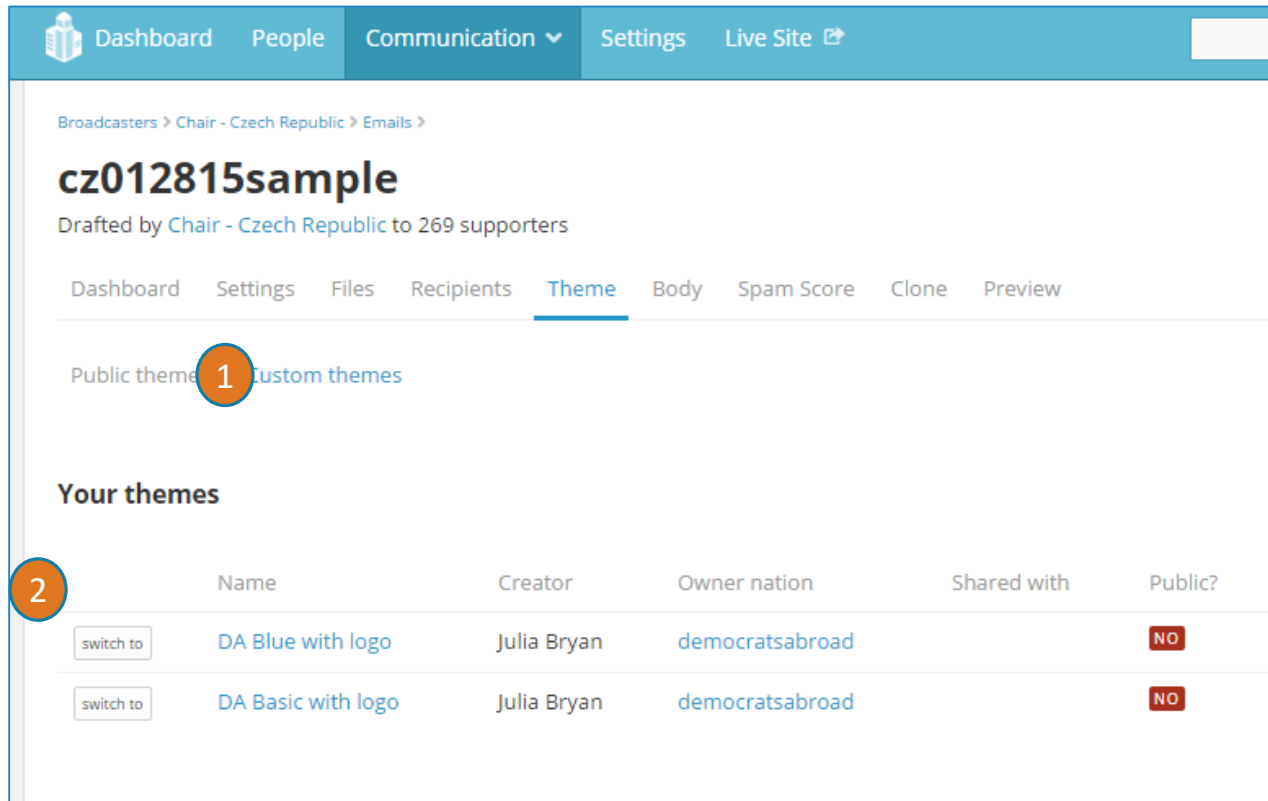
filtered by

Select ▲

Email | X

- Americas-CC-Email
- Americas-CC-Email-Fundraiser
- Americas-CC-Email-Taxation
- Americas-cc-email-VoterAlerts
- AP-CC-Email
- AP-CC-Email-Fundraiser
- AP-CC-Email-taxation

Choose a Theme



The screenshot shows the 'Theme' tab in an email management system. The breadcrumb trail is 'Broadcasters > Chair - Czech Republic > Emails > cz012815sample'. Below the breadcrumb, it says 'Drafted by Chair - Czech Republic to 269 supporters'. The 'Theme' tab is selected, and the 'Custom themes' link is circled with a '1'. Below this, there is a section titled 'Your themes' with a table of available themes. The 'switch to' button for the first theme is circled with a '2'.

	Name	Creator	Owner nation	Shared with	Public?
<input type="button" value="switch to"/>	DA Blue with logo	Julia Bryan	democratsabroad		NO
<input type="button" value="switch to"/>	DA Basic with logo	Julia Bryan	democratsabroad		NO

1. Choose “ Custom themes” to access Democrats Abroad email themes
2. Select your theme by clicking “Switch to”

Note: It's vital to use DA custom themes as they include the DA footer with opt out and address information.

The message Body tab - Components of an email blast

Dashboard Settings Files (1) Recipients Theme **Body** Spam Score

From [+ Add variant](#)

1 DA Helpdesk
<helpdesk@democratsabroad.org>

Subject [+ Add variant](#)

2 New Emailing Editor Screen

Normal **B** *I* U A [Alignment icons] [List icons] [Link icon] [Unlink icon]

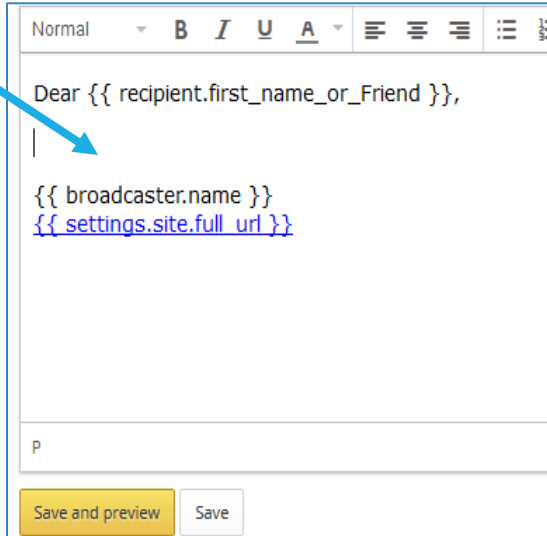
Dear {{ recipient.first_name_or_Friend }},
| 3
{{ broadcaster.name }}
[{{ settings.site.full_url }}](#)

P

4 Save and preview Save

1. **From:** Although you can't change the sender email address you can edit the From name as you wish, for example: Mary Seat – Chapter Chair or Calen Dar – Events Chair
2. **Subject** – keep subjects short & pithy.
3. **Message:** *Type directly* in the text box or else **use keyboard commands to paste** text (see the *next page* for the commands).
See pages 14-15 for the formatting commands. Also see pages 16-18 for **adding images and file 'attachments'**
4. **Once you've finished your text, click "Save and preview"** then your work is saved and you can move back and forth among the other links.

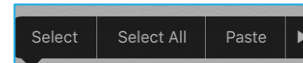
The new WYSIWYG editor - Entering content



Paste formatted text directly into the composition screen (there is no longer a “Paste from Word” icon) – use keyboard commands not the mouse right-click:

- **Keyboard:** Use **Ctrl+V** (PC), **Command ⌘ V** (Mac)

- **Touch screens** follow the usual steps:



TIP: To keep a consistent spacing between paragraphs, 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.

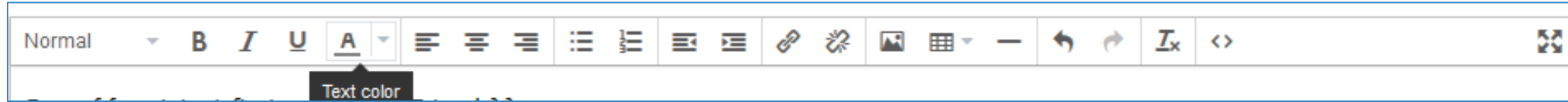
HTML coding – you can enter, paste, change or copy the source code by pressing the <> icon.

TIP: HTML experts will find it easier to fix the line spacing by substituting some <p> with

Type text directly

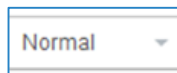
And of course you can always type directly in the composition box and then format it.

The new WYSISYG editor – Formatting - 1



Important changes in this new editor are replacement of the CSS Style icon by commands on the formatting bar, and improvements to the way images can be embedded and formatted.

It is also much easier and obvious to work in **full screen mode**:  AND you can now see the function of each icon when you mouse over it.



To change **font size** open the Font style box and choose one of the Heading sizes. Nation Builder knows that the results aren't always what we expect here, and are working to improve this option



Adding a **font color** is now much easier. Open the color box and choose the color (including custom colors) just like you would with any other content processing program. B, I and U obviously work the way these commands always have.

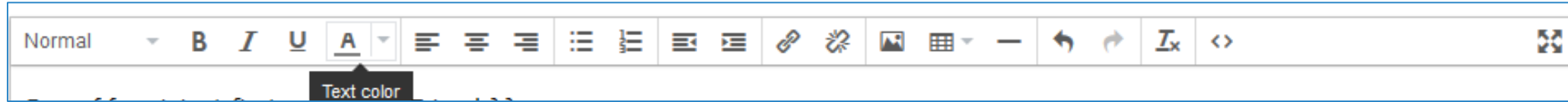


The **text justification** buttons work both for text and images (see page 17 on images).



Bullets, Numbering, Indents: Other than slight improvements to the way these functions work, there are notable changes.

The new WYSISYG editor – Formatting - 2



The **hyperlink** icon has a new look and the dialogue box is slightly different, but there are no major changes.



Changes in the **image function** are explained on pages 17-18



Nation Builder has improved and simplified the **table** functions. The best thing to do is to play with this option to see how it works. [Let us know what you discover](#)



No special remarks for the **horizontal line**, **undo** and **redo** functions



The **Remove Formatting** function may come in handy as a way to start from scratch if the formatting you had set doesn't look like you had expected.



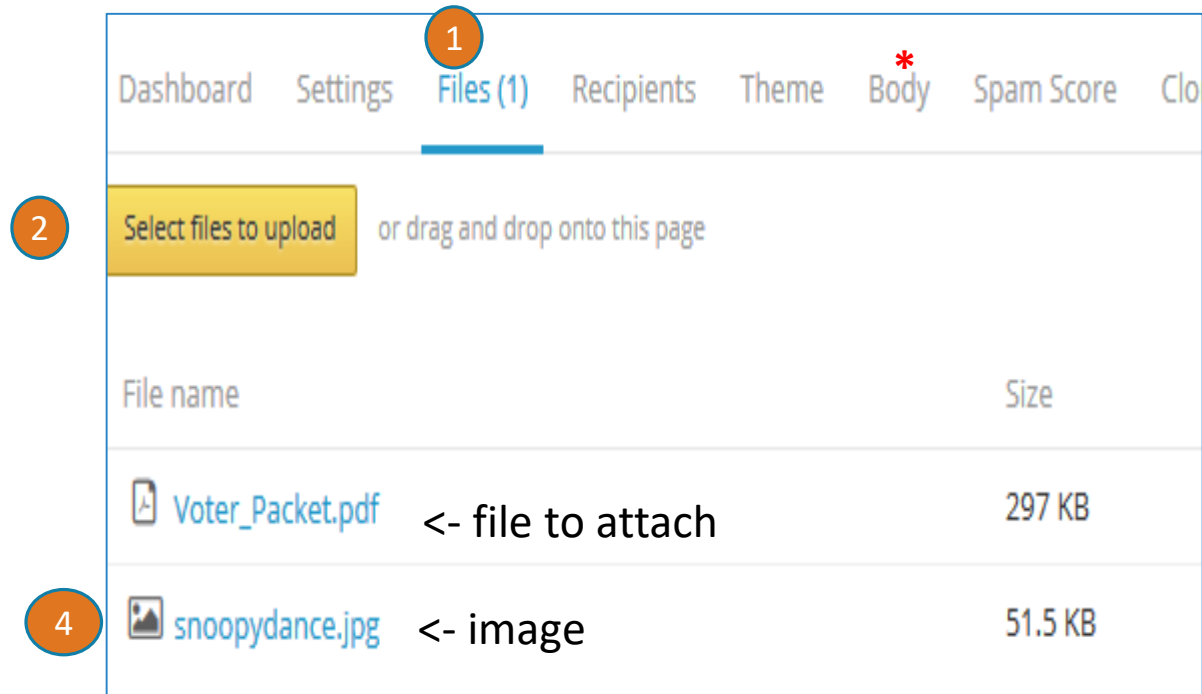
The **Source code** icon is now used instead of the previous **HTML** icon. It works the same way and is just as useful as ever.

How to add (image and document) files to be linked in the message

3

Adding .docs and .pdfs

Right click and copy the file link for pdfs and docs, then paste into your email.

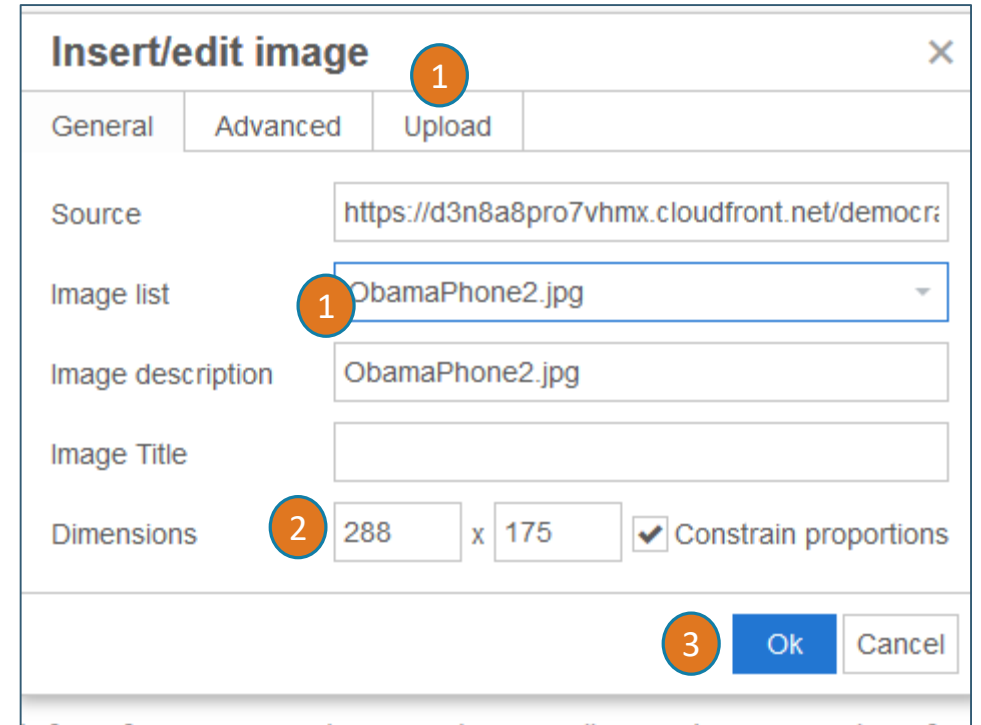


1. Add a file by clicking the “Files” tab in the sub-navigation *. This is the place both for document files (ex: pdf) and for images.
2. Select “Upload files” to browse files on your computer
3. **For hyperlinks to files (.pdf etc.)**– it’s a good idea to paste the url into a notepad file, especially if you’ve uploaded more than one file.
4. **Images** are simpler as they are listed on your message’s Image icon. See page 17 for more information

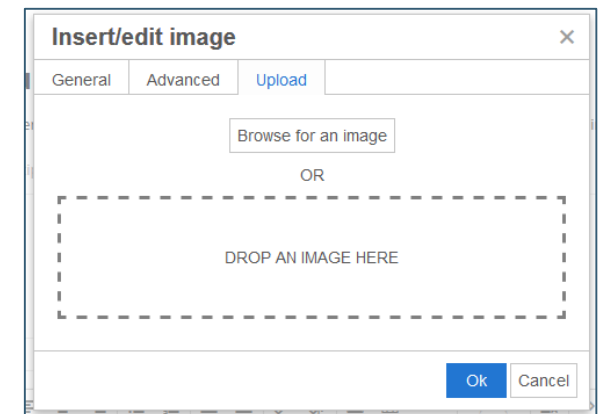
* **Note:** You can open the Files tab at any time, but if you’ve added text in the Body tab make sure you click SAVE before leaving that page.

Insert/Upload and Adjust an image

1. Use the image icon on the text editor to insert an image (jpg or png) in the message screen.
 - You can upload an image from your PC using the **Upload** Button.
 - Or you can click the **Image List** to select a graphic file that you've already uploaded (see previous page). Click **OK** to insert the image (there is no preview in the dialogue box)
2. Change the size in the General box or open Advanced settings to adjust horizontal and vertical spacing or border.
3. To position the image use the alignment icons in the taskbar of the message itself




Browse screen after clicking upload →

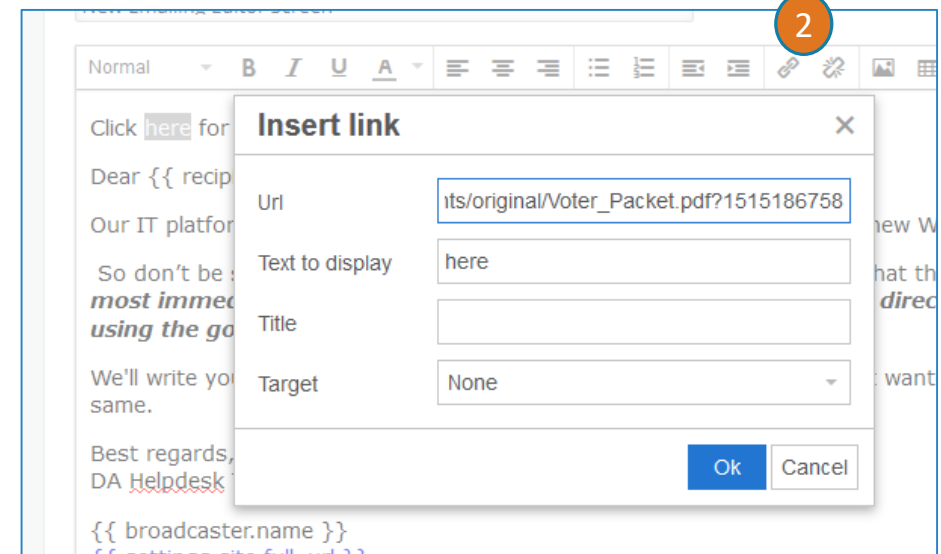
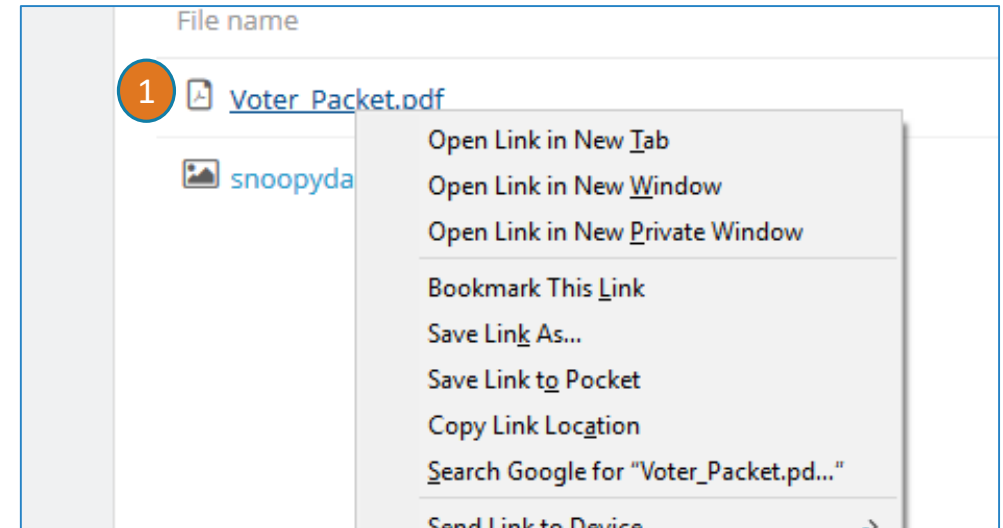


Hyperlinking a document “attachment”

1. After uploading the file (to the DA Nation Builder cloud) right-click the file name and copy the url with the command: Copy Link Location, Copy Shortcut, Copy link address, etc. It's a good idea to paste the url in notepad so it will be available when you need it.

2. In the Body tab, select the word/phrase to be clicked for the hyperlink. Open the Insert Link icon  Paste in the URL copied from the File tab.

For better accessibility add a title for the file. In the Target field you can choose to open the attachment in a new window.



Saving your email, first preview and Test Email

The screenshot shows an email editor interface. At the top, there are two lines of placeholder text: `{{ broadcaster.name }}` and `{{ settings.site.full_url }}`. Below this is a large text area with a vertical cursor. Underneath the text area is a 'P' label. A row of buttons contains 'Save' (with callout 1) and 'Save and review' (with callout 4). Below the buttons is a 'Preview' section with callout 2, containing icons for PC and Phone views. The main preview area displays the 'DEMOCRATS ABROAD' logo. At the bottom, there is a callout 3 pointing to a text input field containing 'a@democratsabroad.org, b@democratsabroad.' and a 'Send test email(s)' button. Below the input field is the text 'Comma separate email addresses to send to multiple accounts'.

1. You can Save your message at any time and then Preview it in the screen below.
2. You can choose to Preview in PC or Phone mode to have an idea of the layout – spacing, image positions etc.
3. Scroll to the bottom of the preview screen to send a Test email. It's especially important to make sure all links work and that line spacing looks ok. You can add send to one or several addresses, separated by a comma. Note: The test email looks just like the real one, so warn people before you send them the test
4. Once your email is ready, click the Save and Review button to go to the final screen.

Send your Blast email


Dashboard Settings Files (2) Recipients Theme Content **Review and send** 2

From DA Helpdesk <helpdesk@democratsabroad.org>

Subject New Emailing Editor Screen

Recipients supporters with filter GAF_Fagens

HTML 1



Dear ,
Our IT platform, Nation Builder, has brought us a New

Text

Dear ,
Our IT platform
So don't be su
We'll write you
Best regards,
DA Helpdesk Tea
DA Helpdesk
<http://www.democratsabroad.org>

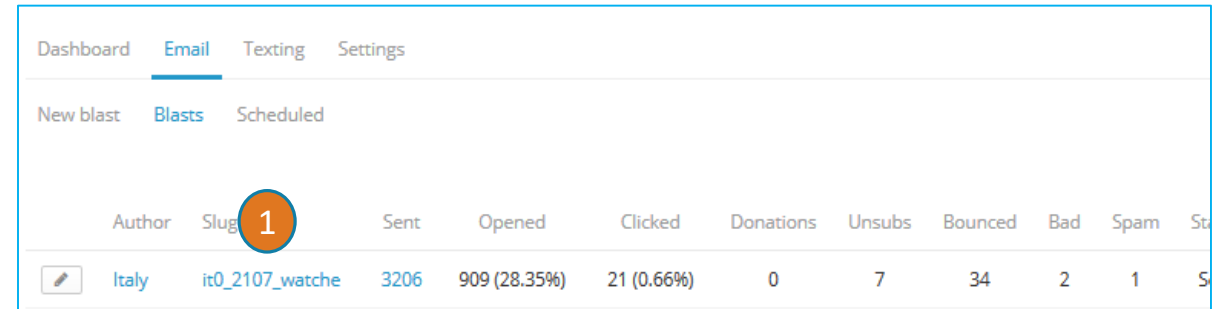
3 Send email now to 1 person Schedule


1. You can have a final look at your message in both html and flat text.
2. You can still return to any screen to edit or check.
3. When you're ready:
Click "Send email now to X people"
OR
Click Schedule to send later (time zone is EST).

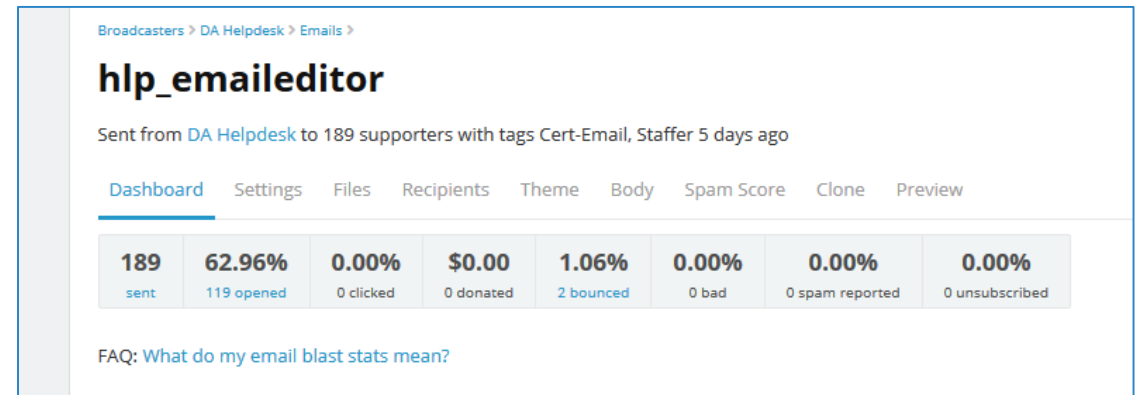
Your email statistics

After you 've sent your email, you can check how well it has been received, bounce statistics, click etc.

1. Go back to the general Email list dashboard and click on the Slug to open the details
2. Click the individual hyperlinks under each section to see who opened the file, what links were clicked, whose email bounced and so on.



	Author	Slug	Sent	Opened	Clicked	Donations	Unsubs	Bounced	Bad	Spam	St
	Italy	it0_2107_watche	3206	909 (28.35%)	21 (0.66%)	0	7	34	2	1	S



Broadcasters > DA Helpdesk > Emails >

hlp_emaileditor

Sent from DA Helpdesk to 189 supporters with tags Cert-Email, Staffer 5 days ago

[Dashboard](#) [Settings](#) [Files](#) [Recipients](#) [Theme](#) [Body](#) [Spam Score](#) [Clone](#) [Preview](#)

189	62.96%	0.00%	\$0.00	1.06%	0.00%	0.00%	0.00%
sent	119 opened	0 clicked	0 donated	2 bounced	0 bad	0 spam reported	0 unsubscribed

FAQ: [What do my email blast stats mean?](#)



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>