



NationBuilder

101

**FOR
PURPOSE** ▲

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Nationbuilder Support and How-to's

Nationbuilder maintain resources to help you with most tasks. You can find their documentation here: <http://nationbuilder.com/docs>

If you think you have a bug or a problem with Nationbuilder then feel free to contact us but you do get support from Nationbuilder by emailing help@nationbuilder.com



How to use this guide


In this guide navigation between pages or tabs is denoted by > This can also be thought of as where to click. For example, to describe how to find your way to batch update a list you earlier created would be: People>Lists> List Name>Batch Update.

Log-in and overview

The easiest way to log into your control panel is to bookmark the url:

<https://yournationname.nationbuilder.com/admin>

Or you may have a log-in at the bottom of your website:



Sign in with [Facebook](#), [Twitter](#) or [email](#).

Control Panel Overview

You should now have several tabs across the top of the page - don't worry if you don't see all of these as they correspond to your permission set.



Dashboard:

- Activity- recent activity of your members.
- Growth - plots graphs of supporter numbers.
- Contacts - lets you search for all recent contact with your members.

People: This is where you manage your contacts. From here you can edit profiles, create lists of members, and add new conatcts, amongst other functions.

Website: Access to edit website pages if you have permission. Go here to create and edit events.

Communications: This is where you go to send bulk email and edit your broadcaster profile.

Anatomy of the Database

Click on the People tab in the top navigation to access the database.



Click on someone's name to open up their profile.

Inside a profile



At a Glance:

A lot of information is available at a glance when looking at a profile. Hover over icons to see what they represent.

If someone has a line through their email or mobile it means they have unsubscribed from receiving that form of communication. When talking to them try and convince them to receive some level of communication.

The person's bio is pulled from social media – most likely Twitter. This is searchable you want to look for keywords or how someone describes themselves.

Background notes can also be added and are searchable. This is a good place to put notes which you want to see at a glance and be able to search for.

Keeping Data Clean

Always ensure you enter fields correctly. The data in a field needs to be understood by others and also needs to be automatically searchable by other platforms which can connect to the database. If you are entering a field such as

'Employer' ensure you use the same name as has been used in the past and get the spelling correct or they won't show up in your filtering in the future.

Mobile Numbers: Should always be internationalised +6421234567

Names: The 'First Name' field should be used for the name a person is commonly known as, eg Joe instead of Joseph. This is the name that will appear at the top of a bulk email or text message you send.

Do not add other name in brackets e.g Joseph (Joe).

If the first name and last name are not the person's legal names then the field "legal name" should be used. E.g First Name "Joe", and Legal name "Joseph".


Email: Email addresses are unique to a profile (they cannot be shared by two people or employers. Remember this if you create a new person profile.


If two profiles are given the same email address they will merge and data will be lost 🙄.

Tags

Tags are particularly useful for recording an action at a moment in time – but may also be used to record data points that help define a profile. Can be used for anything from event attendance to recording interests and issues, to ethnicity

Note that Tags rely on correct spelling- for example 'Delegate' and 'delegate' are different tags and can cause confusion. Before creating a new tag ensure it doesn't already exist. If it does exist make sure you are using the correct spelling.

Click  to add a tag. Type in the tag(s) you want to add. Click the yellow 'add tags' button.

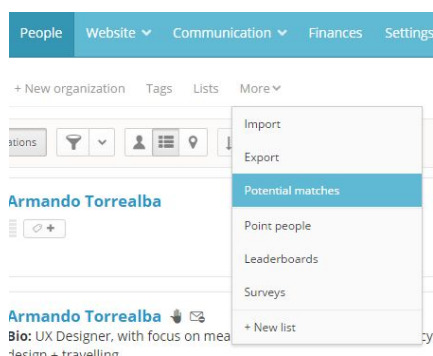
Click on the  'x' to remove a tag.

Using Tags in Filters: Tags are a useful tool for filtering people, as well as enabling assessment of individual engagement. You could, for example, make a list of everyone tagged with attending a particular event, in order to follow up for subsequent engagement. You can click on any tag to bring up a list of everyone with that tag or you could create a filter containing tags People>Filter>Add Criteria>Tags>Tag Name. (See pg).

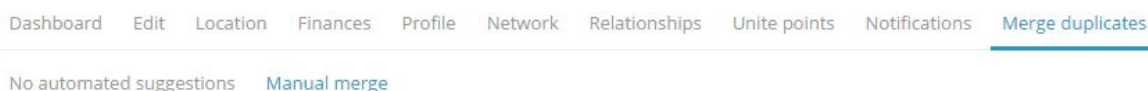
Merging Duplicate Profiles

Because Nationbuilder pulls fragments of information from multiple sources, it sometimes isn't sure whether some of the pieces of information belong to one person or another. At times 'duplicates' (duplicate profiles) are created in the system because Nationbuilder is unable to absolutely confirm that two profiles are actually the same person. This is most common with social media profiles for people who use a different name or email address to the one on you have for their profile. If Nationbuilder can create a positive match it will merge the duplicate profiles, however if it is unable to absolutely confirm but suspects a duplicate it will store them as potential matches. So whilst some merging can be achieved automatically, much of it must be done manually.

It is a good idea to periodically review your potential matches: People > more > potential matches. This will prompt you to make a decision on merging any profiles that Nationbuilder thinks may be duplicates. Work through the list and merge any you can be sure of. If unsure skip them.

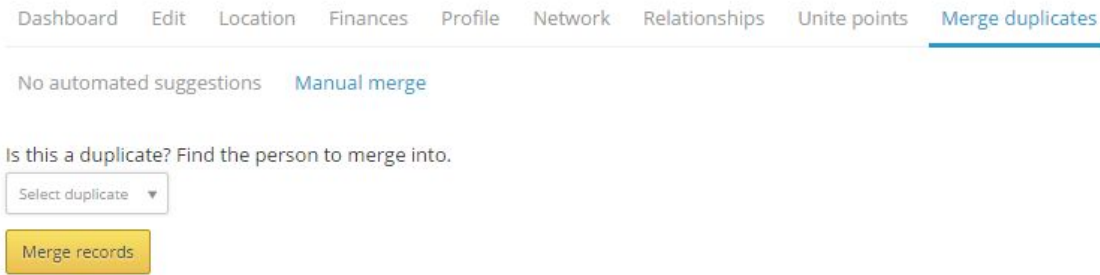


If you see two profiles which you know belong to the same person it is possible to manually merge. Open the duplicate profile and select 'Merge duplicates' from the secondary navigation menu.



If automated suggestions populate, you can assess whether the profiles that appear are indeed duplicates. When there are no automated suggestions, you can perform a manual merge. Either type the individual's name into the search box, or if you have already found the duplicate profile, enter the Nationbuilder ID number of the duplicate you want to merge INTO. Ensure you merge INTO

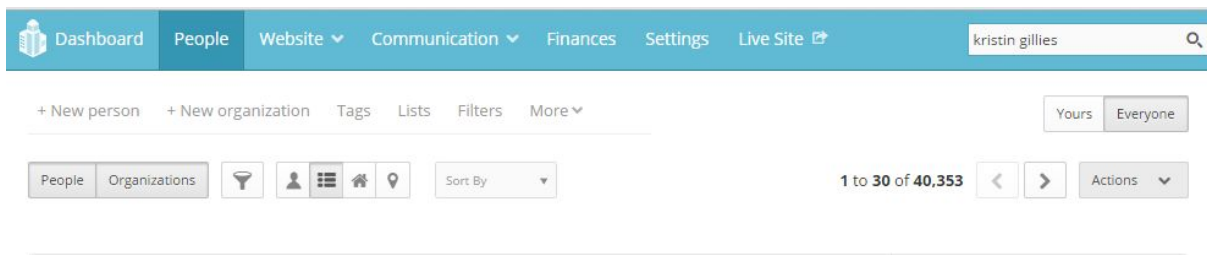
the profile that contains the most vital data. Select the duplicate profile. Click the yellow 'Merge records' button.



You will sometimes be asked to reconcile differences between the two profiles such as what the person's name should be or what email address should be the primary.

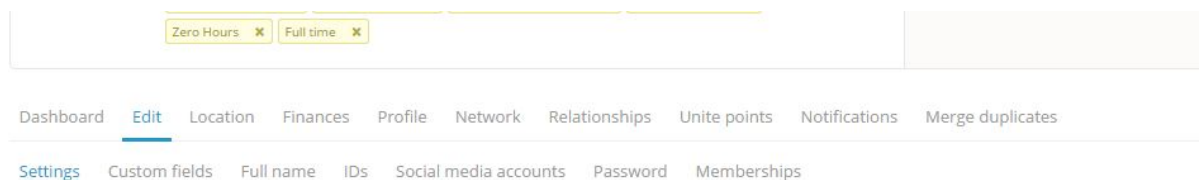
Working with Profiles

From the People tab on the top navigation you can work with the data of individuals and groups of individuals.



Editing a Profile

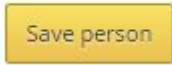
Want to edit an individual's details? It's all in the 'edit' option, in their profile. Just click 'edit', next to 'dashboard'. People > Profile > Edit >



You have many set fields you can edit, you can also add a social media account against a profile, change someone's website login password, and update relationships from here.



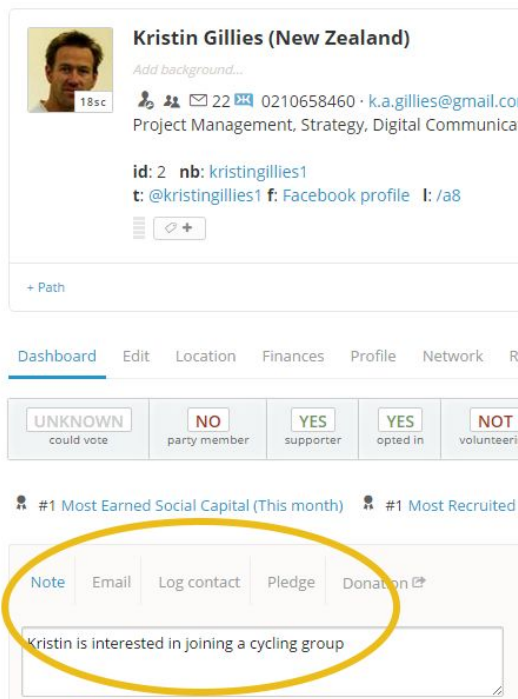
After editing a profile make sure you scroll to the bottom of the page and click



Logging an interaction

Log interactions with an individual or organisation via options available on the dashboard of an individual profile. People > Profile > Dashboard >

Adding a note to an individual's profile:



Logging a contact with an individual:

Note | Email | **Log contact** | Pledge | Donation

Phone call | 1sc

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

Log to path
Become a delegate

Broadcaster
Select

Set support level
Select

Set priority level
Select

Kristin Gillies was contacted

Sending an individual a personal email:

Note | **Email** | Log contact | Pledge | Donation

From Broadcaster*

"Kristin Gillies" <k.a.gillies@gmail.com>

Add Cc Add Bcc

Subject*

Follow-up about meeting

Attach a file

Hi Kristin,

Log to path

Prospect to Member

Send email



Logging an email in Nationbuilder from your email provider

It is easy to record an email sent from your email provider against yours, and the contacts profile in Nationbuilder. This is important to enable a permanent record which can be accessed by others.

In any email sent from your email just bcc "yourname@yournationname.emailnb.com" and it will be logged against both of your profiles.

This also works if you receive an email from a member which you want to log in Nationbuilder- just forward the email to yourname@yournationname.emailnb.com and it will be logged in Nationbuilder, but only against your profile.

It is possible to have all email communications sent to Nationbuilder, and this can be useful for creating a permanent record of communications and to assist with workflow management. Get in touch if you would like help to set this up.

Quick Search of the Database

You can quickly search for a person's name or email address from any page using the simple search box.

1. Type the name of the individual or organisation you want to search for into the search bar (top right hand corner of screen).




2. Hit 'enter'.

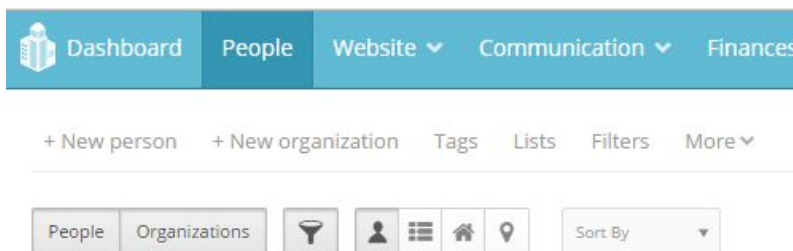
3. You will be directed to a filter of people containing that name or parts of that name or that email address.

Advanced Search using Filters

How to run a Filter: The advanced search function is known as 'filtering'. Here's the

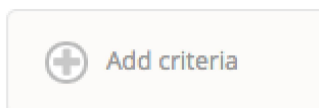
icon:  On the People Page it's located third in the third navigation row down.



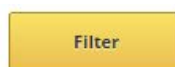
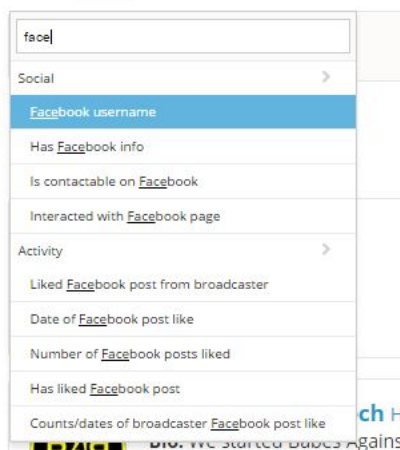


Click the 'filter' icon.

Click 'add criteria' in the search bar that appears below the filter icon.



Over time you will familiarise yourself with all criteria you can filter for but you don't have to memorise where to find them all. Just start typing the name of the field you want to include in your filter and all options with that spelling will appear.

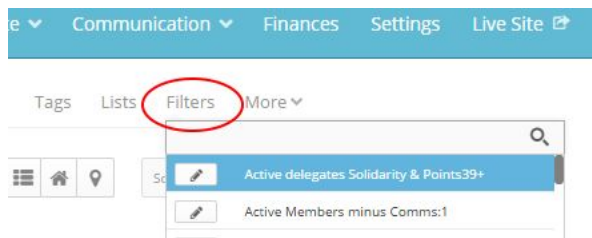


Click on the yellow 'Filter' button to run the filter

How To Save A Filter: If it is a filter you will use commonly it is a good idea to save the filter using the



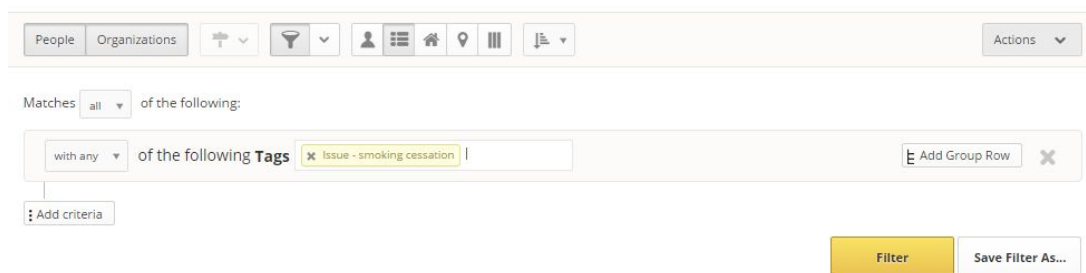
You can access saved filters anytime at People > Filters



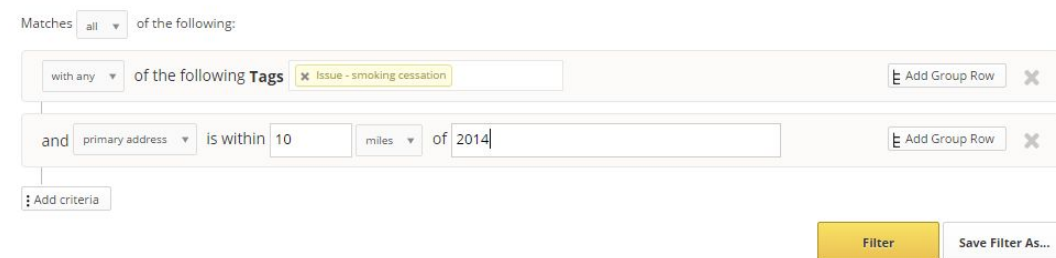
You can also use saved filters when selecting recipients for bulk email (see Sending Bulk Email).

Constructing Filters:

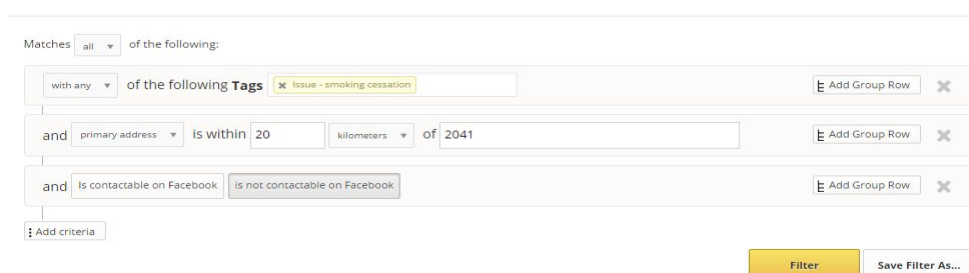
Single Variable Filter:



Multiple Variable Filter:

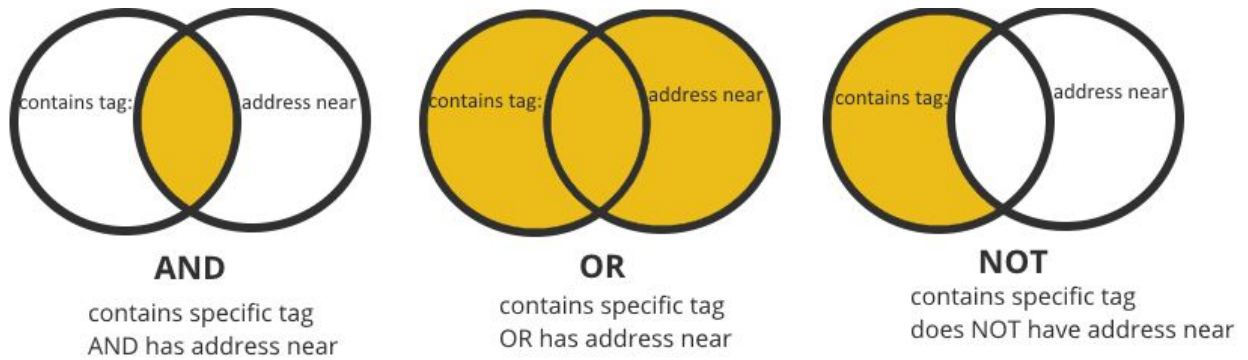


Multiple variable with exclusions:



Traps and Tricks for Filtering

Filtering uses Boolean Arithmetic to construct an equation with the criteria you enter.



A common mistake is not getting the AND / OR correct when constructing your filter.

This is done by selecting either of the following: which puts an 'AND' between criteria or of the following: which puts an 'OR' between criteria.

If you return a result that doesn't seem correct it is most likely you have this selected incorrectly.

You can also bunch criteria to create more complex filters using the

Matches of the following:

matching of the following:

with any

and is within of

or

Lists

Run a filter and find the group of people matching the criteria you're interested in. To take these results and actually do things with them you add them to a list. Lists are at the core of using the database. They allow you to manipulate data, and organise recipients for emails, logging contact, update paths, or other actions.

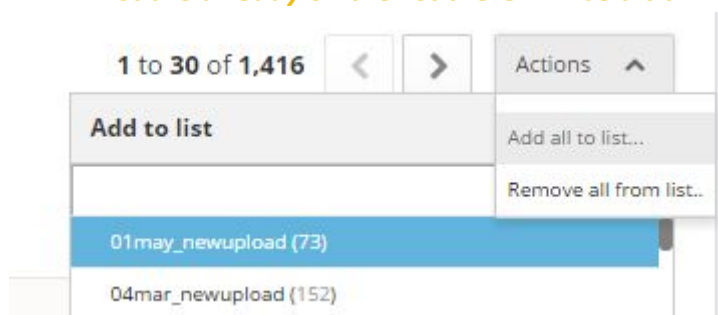
The functions which we'll look at are:

1. Add people to an existing list
2. Add people to a new list
3. Removing people from a list
4. Accessing saved lists
5. Sharing a list
6. Batch updating a list


1. To add people to an already existing list:

First, run a filter to find your people. Once you've found them, add them to a list by selecting 'add all to list' from the 'Actions' dropdown menu on the top right corner of the page. This will bring up your existing lists, any of which you can click on (or search by typing the name of the list into the search box that appears), to have all of the people in your displayed results added to it.

[Note: the number of people in the brackets beside the list name denotes the number of people in the list. If the people you are trying to add or remove from the list are already on the list there will be a tick next to the list name]



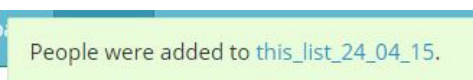
2. Add people to a new list:

This is a two-step process. Click on the '+ Create List'  Write the list name (it helps to develop a standard naming convention for lists and always add a date), click the yellow 'Create' button, and now you have a new list that you can add people to!

Now you need to type your list name into the 'add to list' box back at the top. You are searching for the list name slug- this means that all spaces between words will be underscores. It is easiest to just type the first name of the list and wait for the auto-prompt to find your list.

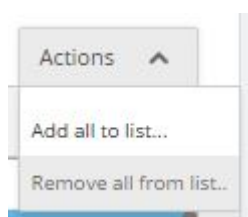


Click on your list as it appears in the dropdown menu, and your people will be added to this list. When the add is complete, follow the hyperlink in the green box through to your new list.



3. Removing people from a list:

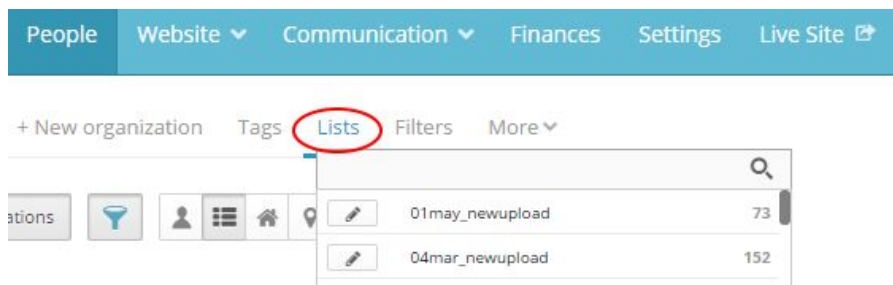
It is a similar process to remove people from a list. Just click on the 'remove all from list', search for list name and then click on link name and they will be removed.



[Note: Lists only consist of those who fit your particular search criteria at the time that you made your list; they DO NOT dynamically update. So if you make a list on July 15 of students at a school, this will not automatically encompass any new students who start after that date. To keep lists up to date, you'll have to run the relevant searches again, and re-add (or remove) everyone to the list (Nationbuilder will recognize if people have already been added to a specific list and will not add someone twice)]

4. Accessing Shared Lists

You can access all existing lists from the lists tab. People > Lists



5. Sharing a List

It is possible to share a list with anyone else who has control panel access. To share the list with someone, open your list and go to 'settings'.

You can choose to share this list with everyone with a specific permission set (admin, staff etc) or with a specific other person.

You can also choose whether to allow the other person can edit the list or not.

People > Lists >

this list 24.04.15

Created by Kristin Gillies on May 23, 2015 at 5:47pm · List th

1416 people Households Settings Batch update

Name

this list 24.04.15

Slug*

this_list_24_04_15

Share with every

Admin

Share with other nations

You have not shared this list with other nations.

Share with another person

Select

Just start typing their name

Let people you share this list with change it



Batch Updating

Okay, so now you've added a bunch of people to a list. But what if you want to update them all at once? There are a number of details about your list that you can 'batch update' all in one go, from tags to paths, to memberships (and countless more).

To perform a batch update of your list, first navigate to the list you wish to amend. Select the list from People>Lists as outlined in step 4 above.

Select "Batch Update" from the options along the top.

You can batch update any field you can see to change that detail against everybody on your list.

People > Lists >

this list 24.04.15

Created by [Kristin Gillies](#) on May 23, 2015 at 5:47pm · List theme sorts by **street address**

1416 people Households Settings **Batch update** Split Export Print sheets Delete ▾

People Tags Followups Log contacts Memberships Relationships Clear field

Prospect	Volunteer	Point person	Receive emails
Select ▾	Select ▾	Select ▾	Select ▾
Fundraiser	Gender	Banned	Receive text messages
Select ▾	Select ▾	Select ▾	Select ▾
Support Level	Inferred Support Level	Priority Level	Do not contact

Additionally you can click on any of the secondary tabs to add or remove tags, open or close follow-ups, log a contact, or change membership of everyone on your list.

73 people Households Settings **Batch update** Split Export Print sheets Delete ▾

People **Tags** Followups Log contacts Memberships Relationships Clear field

Prospect	Volunteer	Point person	Receive emails
Select ▾	Select ▾	Select ▾	Select ▾

Always make sure you scroll to the bottom of the page and click 'Update'



Update all 73 people

Sending Bulk Email

[Note, you must have your broadcaster set-up prior to this step]

Control panel users can send emails to anyone assigned to you whom you have an email address for. In Nationbuilder we call this an email blast. To send a blast, first create a list or save a filter of the people you want to email. E.g. you might want to email everyone who is a member of a church, or everyone who has RSVP'd to an event.

The go to Communication > 'broadcaster name' > Emails > New Blast



ter **Broadcasters** Sent Received Scheduled



Write in the slug and description. Always click "When the recipient clicks on the email, automatically add their info to any forms" Click the yellow 'create and edit email blast' button.

New blast Blasts Scheduled

Slug*

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

Description

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

Increases conversion rate, but is confusing if they forward the email since their name will show up

Create and edit email blast

On the Recipients tab select who you will send the email to using a list or filter

you've prepared earlier. Click 

Click 'continue to select theme'. 

Select the standard email template you use. This should be defaulted to your usual email template and unless you want to change you don't need to select this every time. If you do need to send using another template select 'Custom Themes' then the name of the theme you want to use.

For help in designing a custom html email template – get in touch.

Continue to the 'Body' tab. Write the subject line.

newsletter

Drafted by Kristin Gillies to 0 supporters

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

From

Subject

Format

`{{ recipient.first_name_or_friend }}` --

`{{ broadcaster.name }}`
`{{ settings.site.full_url }}`

Write the body of the email. You will need to make a couple of changes to the standard layout-



Add a greeting before the `{{ recipient.first_name_or_friend }}`

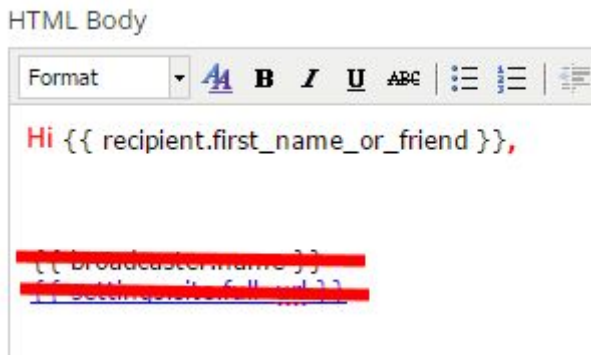
Remove the `--` and replace with a comma at the end of the `{{ recipient.first_name_or_friend }}`

If you are using a Template with your name and site settings in the footer you can delete the

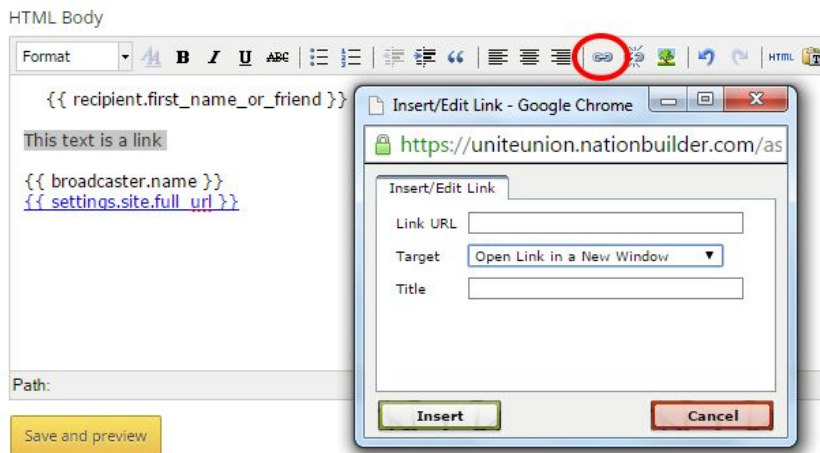
`{{ broadcaster.name }}`

`{{ settings.site.full_url }}`

It should end up looking like this:



To add a link- highlight the text you want to use and click on the chain link button. A pop-out will open where you can add your URL.




To add an image into the email first need to save the image as a file.


Go up to your email tabs and right click on 'Files' and open in a new tab.

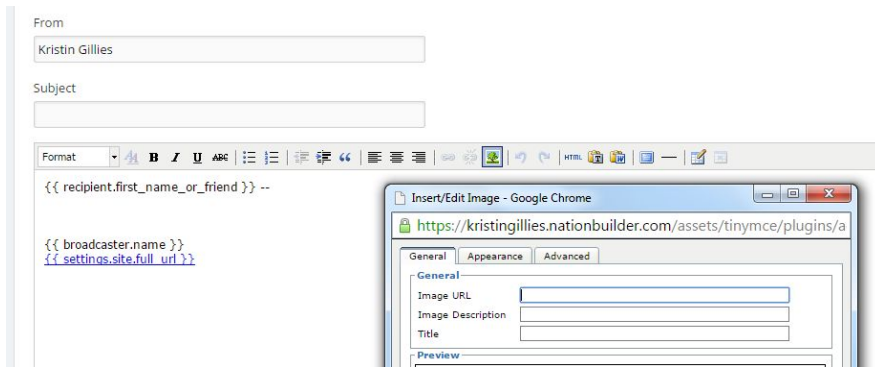
Upload the file from your computer. Once it has loaded right-click on the file name to 'copy link address'

Upload files

File name	File size
 solidarity icon	80 KB

- Open link in new tab
- Open link in new window
- Open link in incognito window
- Save link as...
- Copy link address**

Go back to the body of the email and click the picture icon  to add the image you've uploaded in the file. Paste the URL of the image into the pop-out editor which appears. You can also change the placement and look of the image using this editor.



Cut and Paste into the email body can cause formatting problems.



Finally click on 'Preview'. Test the email by sending it to yourself.



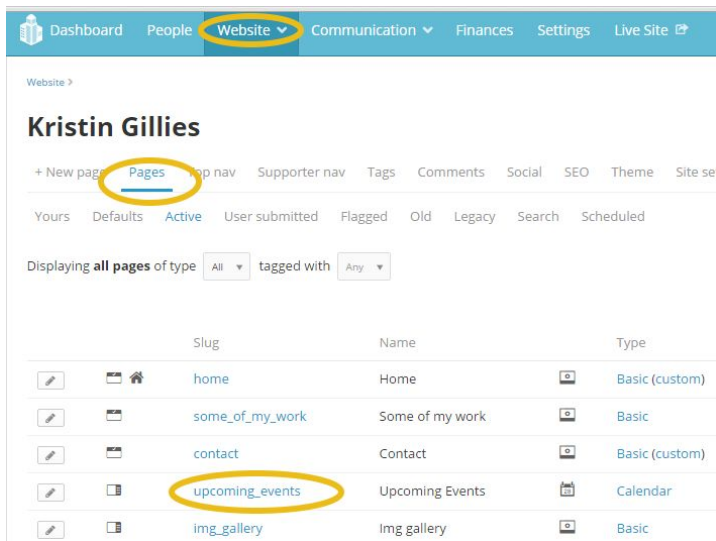
Check that everything is as it should be (in the email that comes through to your inbox).

You are now ready to send the email. Click 'send email now', or 'schedule'.

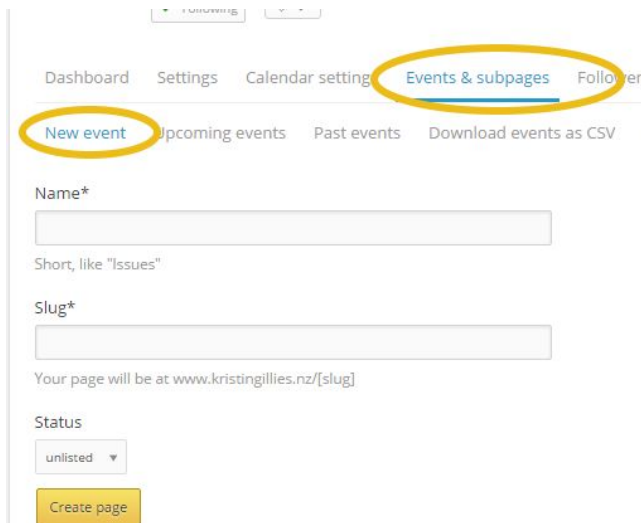


Events

To create an event navigate to website>pages> [calendar page name] >

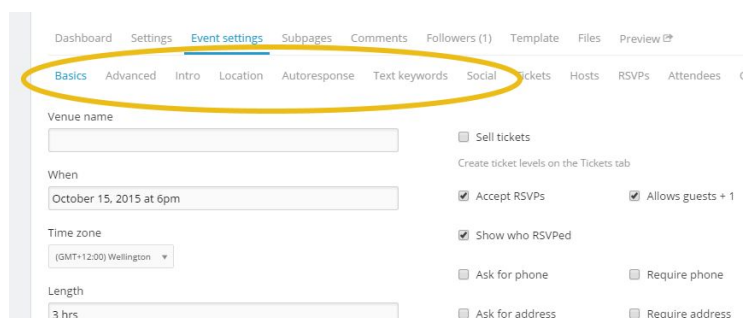


Events and subpages> new event. Give your event a name and create page



Work your way along the sub navigation tab and fill in all the applicable fields.





Advanced: it is always good practice to tag people who RSVP. You can also choose to assign all RSVP's to a point person (only if they don't already have one) or give them a membership.

Intro: The editor to enter your intro is the same as the editor for bulk email (see Sending Bulk Email).

Location: ensure the address you add is recognised by google. This allows it to show on maps and for people to get directions. A map showing all events can also be shown on the calendar parent page.

Autoresponse: Use this to customise the message people who RSVP receive by email. The editor is also the same as the email blast editor (see Sending Bulk Email)

Social: create the event on Facebook and link the events here- anyone who RSVP's on Facebook will be added into the RSVP's in Nationbuilder. If you have their email address they can receive the auto-response also.

Added Functionality

Leaderboards

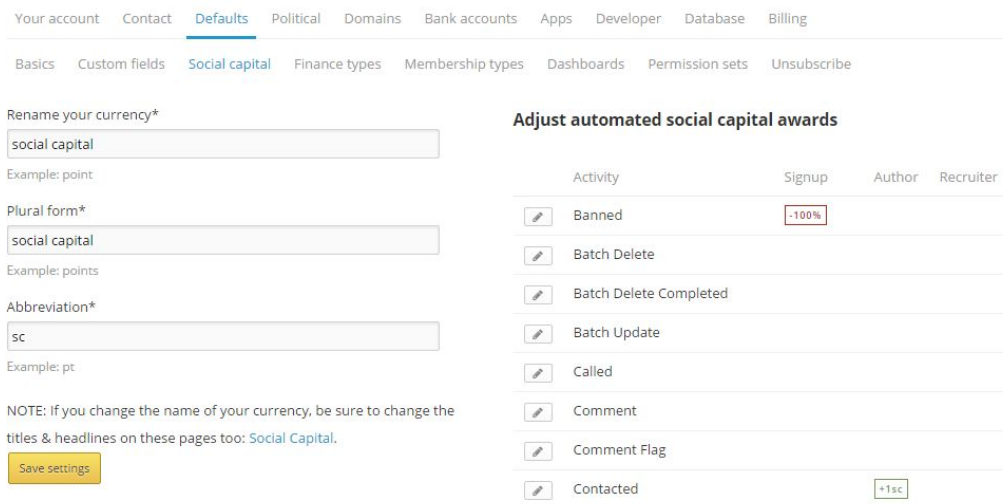
Points are awarded to everyone in the database for actions that they take online. This includes Facebook posts, signing petitions, voting, attending events etc. You can also manually award points. This gamification functionality is built into Nationbuilder. You need to choose if you want to publically display and reward supporters in this manner. In your site settings (website > site settings > basic >) you can turn off or on "show public profiles". You can also choose whether to display a leaderboard on a public webpage, or on your control panel dashboard. You can filter for your members with the most points. Add Criteria> Points. You will need to modify the amount of points to get the result you want.

Adding points manually: You can add points manually when you are looking at any member's profile by clicking on Points> Award Points. You can also award

points when you log a contact with a member. When you select the contact type and method there is a drop-down box from which you can select the number of points you want to award.



To change the amount of points awarded for specific actions go to Settings> Social Capital



Click on the pencil icon to edit. Points can be awarded to the person, the page author, and the recruiter.