

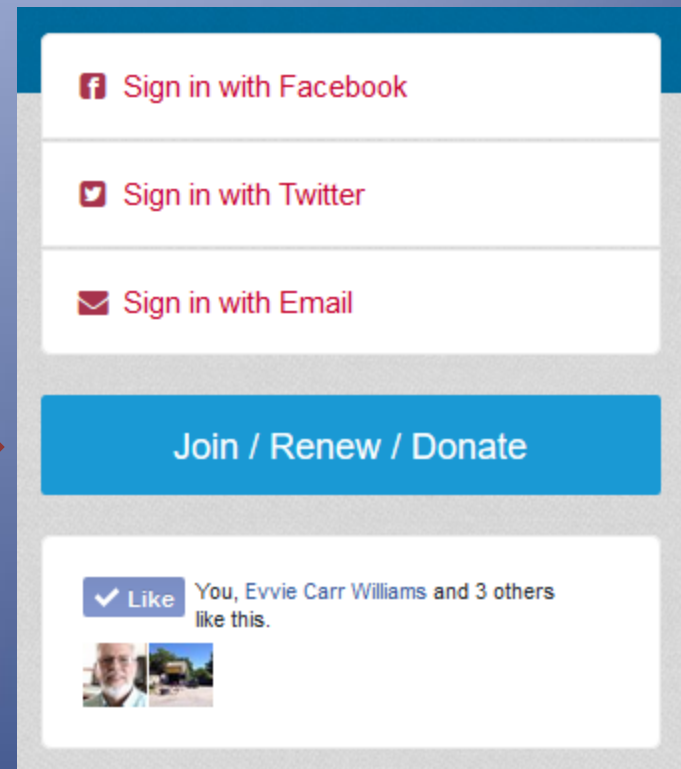


# Using the Web to grow LWV

Tips on Membership, Renewals,  
Communication and Special Features

# How did you do membership renewals this year?

Let's look at what Washington County did with their site...



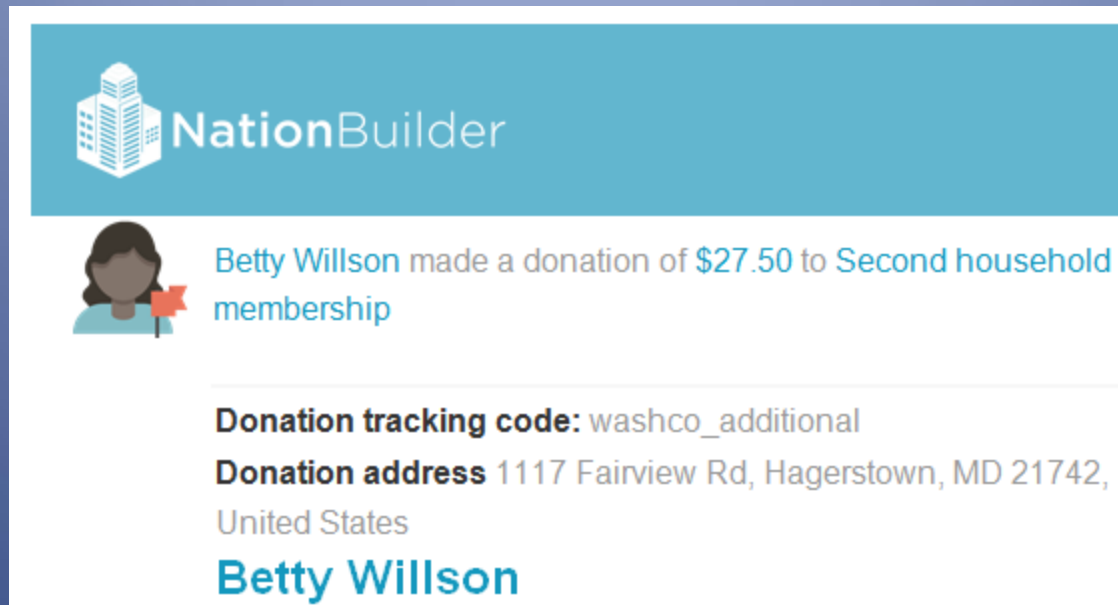
# Pros and Cons of an online account

- Ease of administration is a definite plus
  - The money goes directly to your bank account
  - Your treasurer clearly sees where it came from
  - Everything is entered in NationBuilder for you
  - And NB can take over the process of annual dues renewals
- Stripe (if you use the service the State chose) will take \$0.30 per transaction plus 2.9% which is \$1.75 on a \$50.00 transaction.

# Want a Stripe account of your own?

- Get an Employer Identification Number from IRS in 5 minutes at <https://www.irs.gov/Businesses/Small-Businesses-&Self-Employed/Apply-for-an-Employer-Identification-Number-%28EIN%29-Online>
- Sign up for a Stripe account at <https://stripe.com/>

# What will a renewal look like on the backend?



First, you'll get an email from NationBuilder

# Then, one from Stripe

## Payment of \$27.50 from Betty Willson

support@stripe.com

Sent: Wed 5/11/2016 4:59 PM

To: rwillson14@gmail.com

---

Congratulations! You have just received a payment of \$27.50. You can view the full details of this payment in your dashboard:

[https://dashboard.stripe.com/payments/ch\\_18A4PYC8FuXtVFXRXUsFUEqV](https://dashboard.stripe.com/payments/ch_18A4PYC8FuXtVFXRXUsFUEqV)

We'll be here to help you with any step along the way. You can find answers to most questions and get in touch with us at <https://support.stripe.com/>.

Yours,

The Stripe team

==== Charge Summary ====

Charge ID: ch\_18A4PYC8FuXtVFXRXUsFUEqV

Charge description: washco\_additional

==== Charge Metadata ====

email: [bekw@myactv.net](mailto:bekw@myactv.net)

order\_id: nb\_799a232a2732748bd23d604e9446b8b8

# And when you login to Stripe go to the area marked Transfers...

**PAID** **\$23.97 USD** — tr\_184P7zC8FuXtVFXR5odsXkj1

**Transfer Overview**


Date paid: Apr 27, 2016

Description: STRIPE TRANSFER

**Metadata** [Edit](#)

No metadata

**Bank Account Details**

 **THE COLUMBIA BANK**  
\*\*\*\*8583 – USD

**Transfer summary**

	Count	Gross	Fees	Total
Charges	1	\$25.00	-\$1.03	\$23.97
Refunds	0	\$0.00	\$0.00	\$0.00
Adjustments	0	\$0.00	\$0.00	\$0.00
Transfer				\$23.97 USD

# Let's enlarge the summary ...

**PAID**

**\$23.97 USD** — tr\_184P7zC8FuXtVFXR5odsXkj1

## Transfer Overview

Date paid: Apr 27, 2016

Description: STRIPE TRANSFER

## Metadata

 Edit

No metadata

## Bank Account Details



**THE COLUMBIA BANK**

\*\*\*\*8583 – USD

## Transfer summary

	Count	Gross	Fees	Total
Charges	1	\$25.00	-\$1.03	\$23.97
Refunds	0	\$0.00	\$0.00	\$0.00
Adjustments	0	\$0.00	\$0.00	\$0.00
Transfer				\$23.97 USD



So here is how you will see the Stripe fee recorded.

\$25.00 was donated and \$23.97 was transferred to our bank account.

	Count	Gross	Fees	Total
Charges	1	<u>\$25.00</u>	<u>-\$1.03</u>	\$23.97
Refunds	0	\$0.00	\$0.00	\$0.00
Adjustments	0	\$0.00	\$0.00	\$0.00
Transfer				<u>\$23.97 USD</u>

Any questions?

# How do we send email from NB?

Let's start with the event page for today's Council meeting...

## Events



[http://www.lwvmd.org/current\\_events](http://www.lwvmd.org/current_events)

**Published:** January 21, 2015 at 2:45pm **Author:** Richard Willson

✓ Following



[Dashboard](#)

[Settings](#)

[Calendar settings](#)

[Events & subpages \(26\)](#)

[Followers \(2\)](#)

[Template](#)

[Files](#)

[Preview](#)

[Live](#)

[New event](#)

[Upcoming events](#)

[Past events](#)

[Download events as CSV](#)

[Subpages](#)

[Scheduled](#)

Slug

Name

When

Status

Updated



[state\\_council\\_2016 \(1\)](#)

State Council 2016

May 21




published

8 days ago


# So when we edit the page



Websites > LWVMD > current\_events >

## State Council 2016

   [http://www.lwvmd.org/state\\_council\\_2016](http://www.lwvmd.org/state_council_2016)

**Published:** May 03, 2016 at 10:16pm **Author:** [Richard Willson](#)



Dashboard Settings **Event settings** Subpages (1) Comments Followers (1) Template Files (2) Preview  Live 

[Basics](#) [Advanced](#) [Intro](#) [Location](#) [Autoresponse](#) [Text keywords](#) [Social](#) [Tickets](#) [Hosts](#) [RSVPs](#) [Attendees](#) [Clone](#)

Venue name

Hood College - Whitaker Campus Center

When

May 21, 2016 at 9:30am

☒ Sell tickets

Create ticket levels on the Tickets tab



Redirect to this page to purchase tickets

2016Council Ticket ✕ ▼



# Notice how a new menu line opens up

Websites > LWVMD > current\_events >

## State Council 2016

  [http://www.lwvmd.org/state\\_council\\_2016](http://www.lwvmd.org/state_council_2016)  
**Published:** May 03, 2016 at 10:16pm **Author:** Richard Willson

☒ Following

Dashboard Settings **Event settings** Subpages (1) Comments Followers (1) Template Files (2) Preview  Live 

Basics Advanced Intro Location Autoreponse Text keywords Social Tickets Hosts **RSVPs** Attendees Clone

New RSVP **21 rsvps** 2 unpaid Print PDF Download CSV

	Name	Guests	Tickets	Paid	Recruiter	Point person	When	
<input type="button" value="+"/> <input type="button" value="edit"/>	Elaine Apter <input type="text" value="120VTL"/>		1 x 2016 Council	\$35.00		Linda Hamm	8 days ago	<input type="button" value="trash"/>
<input type="button" value="+"/> <input type="button" value="edit"/>	Annette Breiling <input type="text" value="27VTL"/>		1 x 2016 Council	\$35.00			8 days ago	<input type="button" value="trash"/>
<input type="button" value="+"/> <input type="button" value="edit"/>	Carole Conors <input type="text" value="55VTL"/>			<u>\$0.00</u>		Linda Hamm	about 7 hours ago	<input type="button" value="trash"/>
<input type="button" value="+"/> <input type="button" value="edit"/>	Melanie Cox <input type="text" value="101VTL"/>		1 x 2016 Council	\$35.00			8 days ago	<input type="button" value="trash"/>

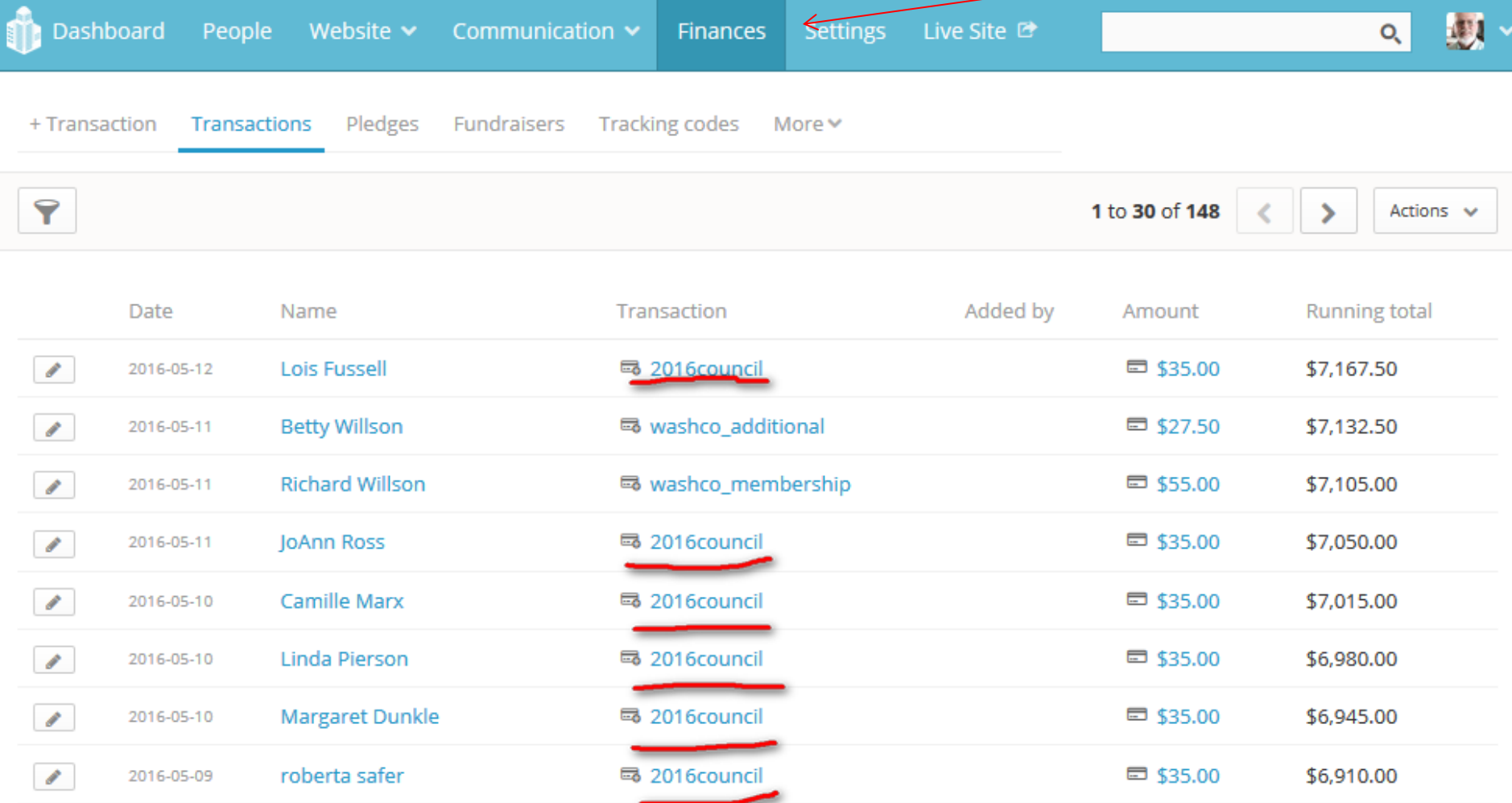
# To send an email I need a list

























- For this we'll go back to the Basics menu choice
- Note that we have tagged each registrant with a “Donation tracking code”

Donation tracking code

2016council ✕ ▼

# Go to “Finances” in the top menu



	Date	Name	Transaction	Added by	Amount	Running total
	2016-05-12	Lois Fussell	 <u>2016council</u>		 \$35.00	\$7,167.50
	2016-05-11	Betty Willson	 washco_additional		 \$27.50	\$7,132.50
	2016-05-11	Richard Willson	 washco_membership		 \$55.00	\$7,105.00
	2016-05-11	JoAnn Ross	 <u>2016council</u>		 \$35.00	\$7,050.00
	2016-05-10	Camille Marx	 <u>2016council</u>		 \$35.00	\$7,015.00
	2016-05-10	Linda Pierson	 <u>2016council</u>		 \$35.00	\$6,980.00
	2016-05-10	Margaret Dunkle	 <u>2016council</u>		 \$35.00	\$6,945.00
	2016-05-09	roberta safer	 <u>2016council</u>		 \$35.00	\$6,910.00

- Notice all of the transactions labeled 2016council

# Click on any one of the transactions

The screenshot shows a web application interface for financial management. The top navigation bar includes links for Dashboard, People, Website, Communication, Finances (active), Settings, and Live Site. Below this, a sub-navigation bar shows + Transaction, Transactions (active), Pledges, Fundraisers, Tracking codes, and More. The main content area has a filter section with a funnel icon, a range of 1 to 20 of 20 items, and an Actions dropdown. The filter section includes a 'Matches' dropdown set to 'all' and a 'matching' dropdown set to 'any'. Below these, there are two criteria: 'is any of the following Donation tracking code' and 'or is any of the following Expenditure tracking code', both with a search box containing '2016council'. There are 'Add criteria', 'Add Group Row', and 'Filter' buttons. At the bottom, a table displays transaction data.

	Date	Name	Transaction	Added by	Amount	Running total
	2016-05-12	Lois Fussell	2016council		\$35.00	\$700.00

- And you get a running total for this event



Dashboard People Website ▾ Communication ▾ Finances Settings Live Site ↗

+ Transaction Transactions Pledges Fundraisers Tracking codes More ▾

1 to 20 of 20 < > Actions ▾

Matches **all** ▾ of the following:

matching **any** ▾ of the following:




is any ▾ of the following **Donation tracking code** 2016council ✕

OR is any ▾ of the following **Expenditure tracking code** 2016council ✕

Add Group Row ✕

Add criteria

Filter

	Date	Name	Transaction	Added by	Amount	Running total
	2016-05-12	Lois Fussell	 2016council		 \$35.00	\$700.00

- You get an instant filter showing registrants for this event only,

Dashboard People Website ▾ Communication ▾ Finances Settings Live Site ↗

+ Transaction Transactions Pledges Fundraisers Tracking codes More ▾

1 to 20 of 20 < > Actions ▾

Matches all ▾ of the following:

matching any ▾ of the following:




is any ▾ of the following **Donation tracking code** 2016council ✕

OR is any ▾ of the following **Expenditure tracking code** 2016council ✕

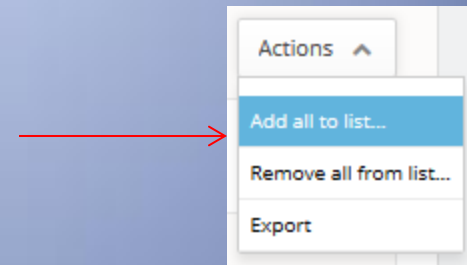
Add Group Row ✕

Add criteria

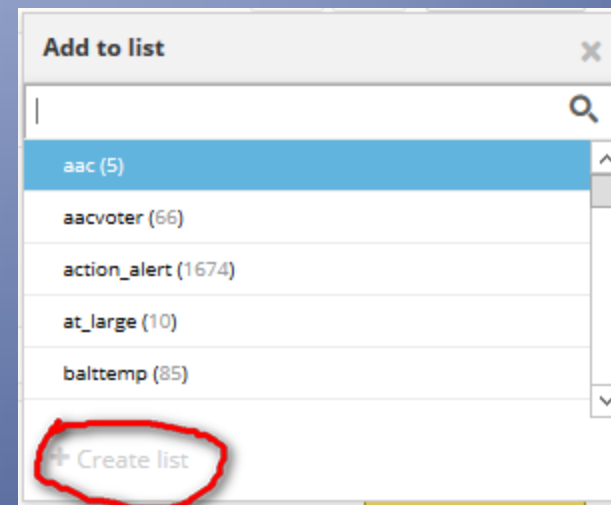
Filter

	Date	Name	Transaction	Added by	Amount	Running total
	2016-05-12	Lois Fussell	 2016council		 \$35.00	\$700.00

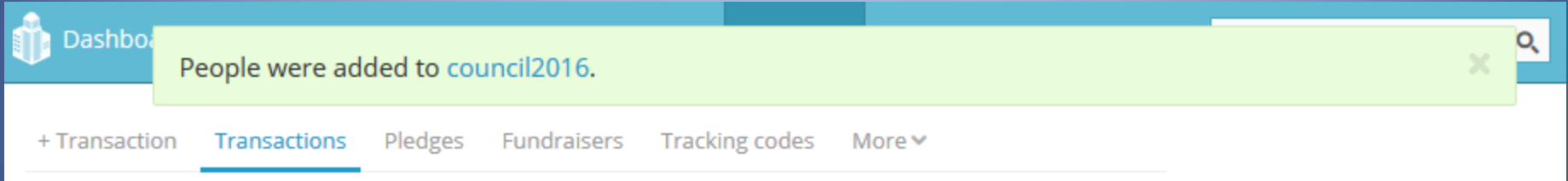
- And you get an Action button that is going to allow us to put all of these folk on a LIST



- The Action button reveals a drop-down choice called Add all to list...



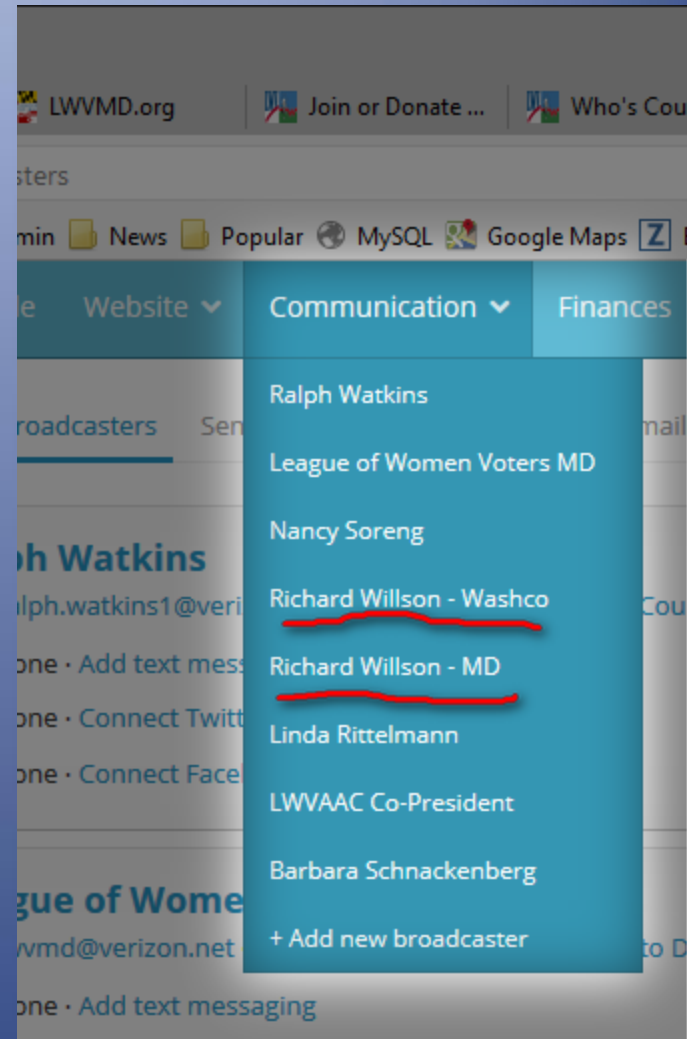
- And in very light grey we have the option to Create a new list

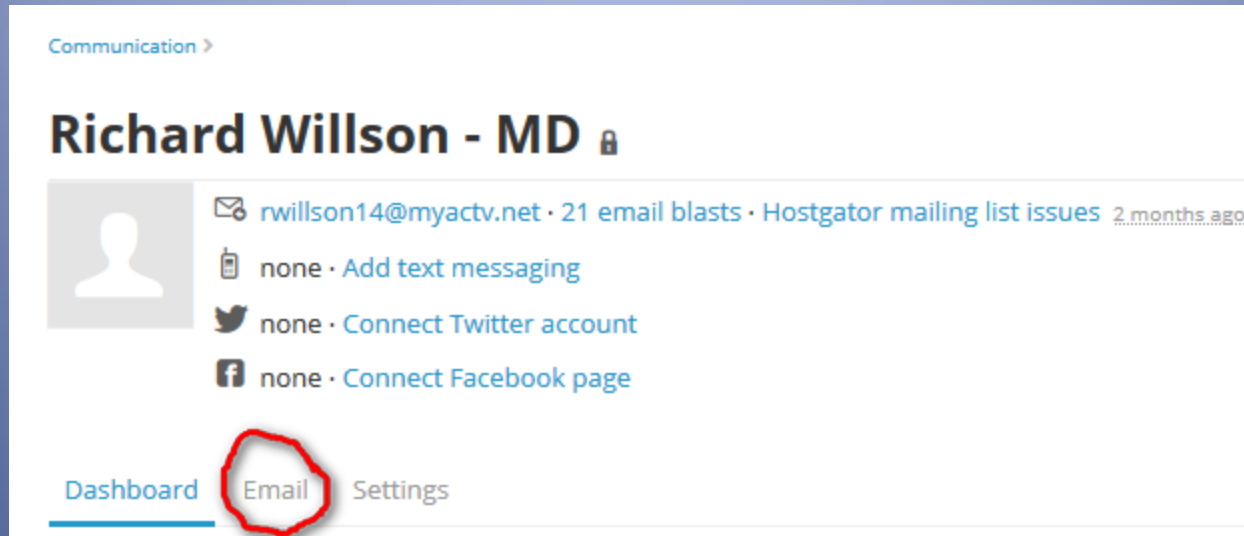


- Now, without any further fuss or bother, NB has automatically added all of our registrants to a list named “council2016”

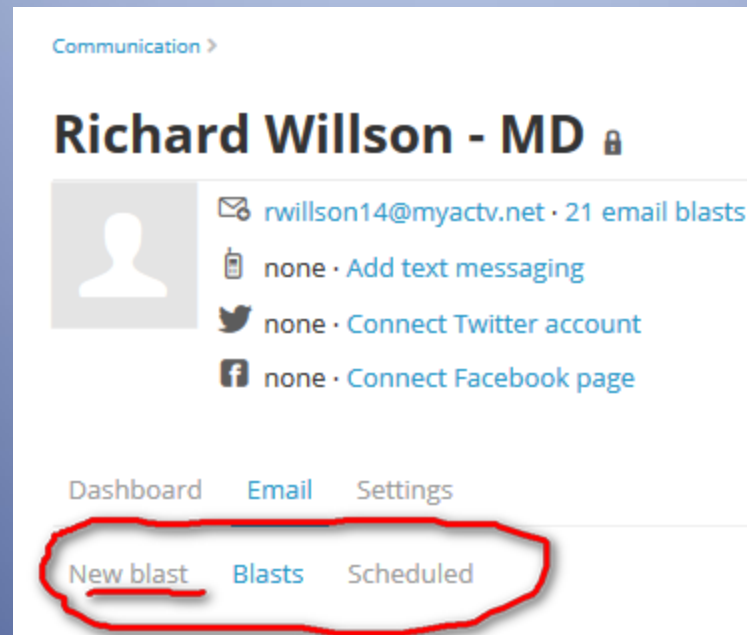
# Next we go to Communication in the top menu

- When we click on Communication we get a list of all of the Broadcasters who have been set up in NB
- In this instance I am looking for Richard Willson in the drop-down list and I find him twice!





- When I pick the Richard Willson - MD option
- Communication always starts on the Dashboard option, but we want the Email choice



- First we see that a new menu line has appeared
- And now we can click on “New blast”

## Richard Willson - MD



 [rwillson14@myactv.net](mailto:rwillson14@myactv.net) · 21 email blasts · Hostgator mailing list issu

 none · [Add text messaging](#)

 none · [Connect Twitter account](#)

 none · [Connect Facebook page](#)

[Dashboard](#)

[Email](#)

[Settings](#)

[New blast](#)

[Blasts](#)

[Scheduled](#)

Slug\*

Council 1

Just a way to identify the email blast, like: donor\_ask1

Description

Test email to all 2016 Council participants

☐ 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

- The slug field is limited to 15 characters so go for a terse slug!
- Now click “Create and edit email blast”



- Our next step is to select recipients
- Because we put all of the 2016 council RSVPs on a list, we can click on the List radio button

Broadcasters > Richard Willson - MD > Emails >

## council\_1

Drafted by Richard Willson - MD to 0 supporters

Dashboard Settings File > Recipients Theme

Send to

☒ Supporters

☐ Prospects

Matching

☐ List

☐ Tags

☐ Filter

☒ All

Save and select theme Save recipients

- When you do so, a new box shows up!
- If you just start typing in the box, the possible matches narrow with each keystroke

Matching

☒ List ☐ Tags

☐ Filter ☐ All

on list

Select list ▼

Save and select theme Save recipients

- I entered “2016” and Council2016 popped up!
- Now click on “Save recipients” and look what happens...












































































The screenshot shows a form with the following sections and elements:

- Send to**
  - ☒ Supporters
  - ☐ Prospects
- Matching**
  - ☒ List
  - ☐ Filter
  - ☐ Tags
  - ☐ All
- on list**
  - A text input field containing "council2016" with a clear (x) and dropdown (v) icon.
  - Two buttons: "Save and select theme" (yellow) and "Save recipients" (white with a red border).

- We get the whole list, and we see that some of our members have opted out of email!

## Will send to 17 of 20 people

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

      12   	Richard Willson <rwilson14@myactv.net>
   	Elaine Apter <aptere@verizon.net>
    	Carolyn Hetterick <carolyn.hetterick@gmail.com>
   	Susan Elson <elsonsusan@yahoo.com>
  	Lois Fussell <fussella@aol.com>
  11  	Camille Marx <marx7633@comcast.net>
     	Barbara Schnackenberg <baschnack@verizon.net>
     	Ralph Earl Watkins <ralph.watkins1@verizon.net>
    	Melanie Cox <sharon398@verizon.net>
  	Margaret Dunkle <margaretdunkle@aol.com>
   	JoAnn Ross <jross.clemens@gmail.com>
    	Linda Rittelmann <linda.rittelmann@gmail.com>
    	Ruth Crystal <ruth@cramercrystal.com>
    	Deborah Mitchell <damitchell_inc@yahoo.com>
  13  	Lois Hybl <lhybl@verizon.net>
  	Annette Breiling <annette.breiling@gmail.com>

- Next we visit the body tab
- Enter a subject
- And then compose, being careful to leave the two lines of code intact
- When done, click

Save and preview

**council\_1**

Drafted by [Richard Willson - MD](#) to 17 supporters on custom list Council2016

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

From [+ Add variant](#)

Richard Willson - MD

<rwilson14@lwwmd.org>

Subject [+ Add variant](#)

Council test 1

Format **B** *I* U ABC |

`{{ recipient.first_name_or_friend }}` --

Type the body of the message **III BETWEEN** these two lines of code...

`{{ broadcaster.name }}`  
[{{ settings.site.full\\_url }}](#)

- This is the test message – delivered!

**Council test 1**

bounces+2262002-3104-rwillson14=myactv.net@em1.lwvmd.org on behalf of Richard Willson <rwillson14@lwvm

Sent: Fri 5/13/2016 1:10 PM

To: rwillson14@myactv.net



Richard --

Thank you for attending today's web training event. My hope is that you will be able to encourage members of your league to begin using all of the rich features of our website to make a difference for democracy!

[Click here](#) to download a Word version of Washington County's Membership Application.

Richard Willson - MD

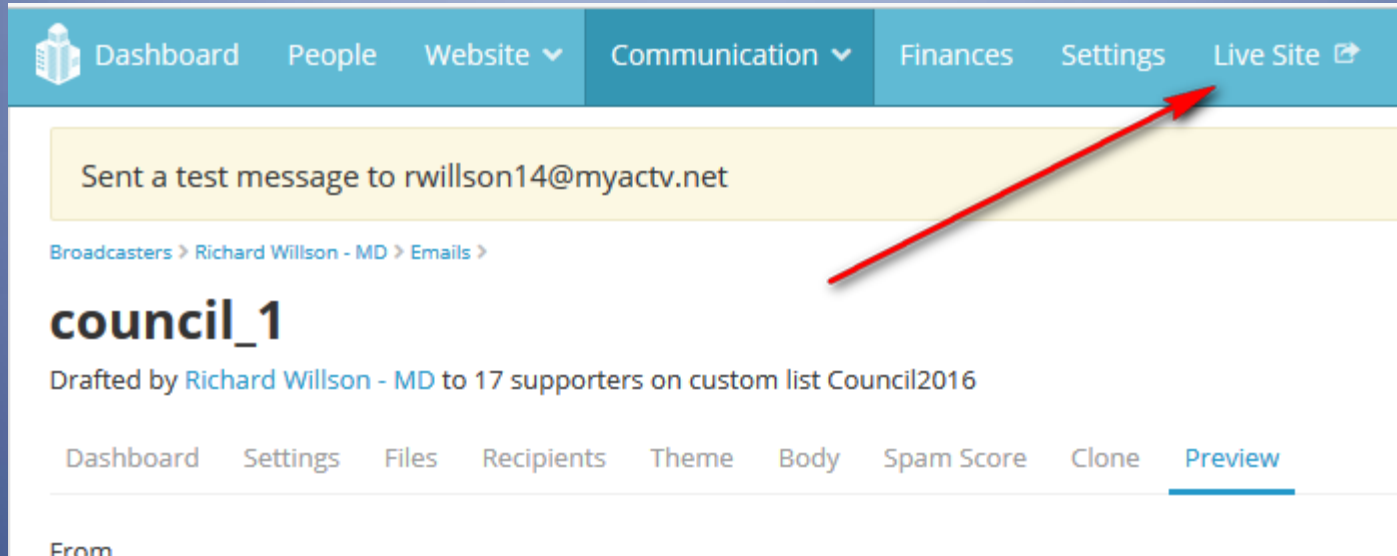
<http://www.lwvmd.org/>

League of Women Voters of Maryland · 111 Cathedral St, Ste. 201, Annapolis, MD 21401, United States

This email was sent to [rwillson14@myactv.net](mailto:rwillson14@myactv.net). To stop receiving emails, [click here](#).

- After you preview a message on-screen you can have it
  - Delivered now, or
  - Schedule a later delivery date
- If you see a problem, you can go back to the “Body” tab and make changes
- You can use the editing tools to add images
- **But what if you wanted to link a flyer?**

# Uploading files



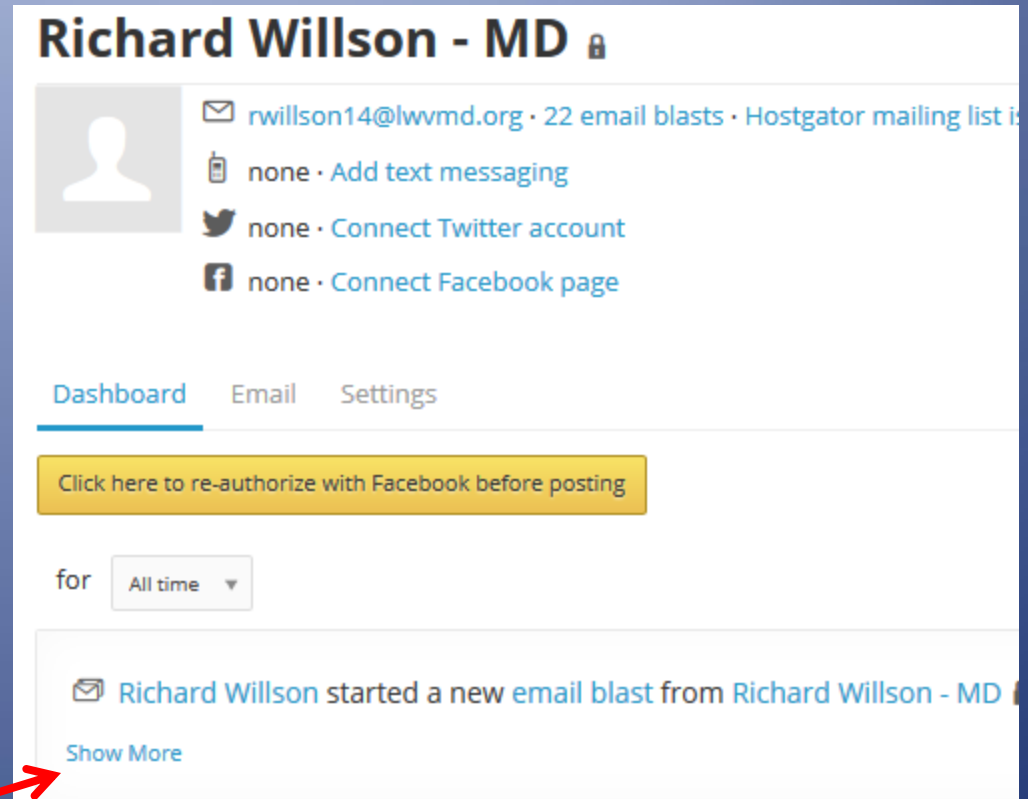
- My favorite is to open a browser tab with the live site
- Then use the side navigation panel to open another instance of the control panel



- Under “Website” select the one you are working with
- Go to one of your web pages
- Click on file
- Upload your document
- Wait for the upload to complete
- Right-click on the document name
- And select “Copy file location”
- Now switch back to the body of your blast, create a link and paste in the file location!

# Finding a blast you did not Send yet

- Find yourself in the Communicator list
- Remember the first display is the dashboard



If I click on “Show more” it tells me this is a Test email to all 2016 Council participants

✉ Richard Willson started a new **email blast** from Richard Willson - MD 🔒 about 14 hours ago

Test email to all 2016 Council participants

[Show Less](#)

- Notice how “Show more” became “Show less”
- If I click on “email blast” it takes me right back to the dashboard for this blast (which is empty because it was never sent)
- From here you can navigate to the body tab and from there you can select “Save and preview”

Save and preview



Try it now!

# Questions about blasts?

-


# Special page types

- Just to whet your interest...


  ActBlue: Connect an ActBlue entity and automatically pull in all the donations. This can be your primary donation page, or a secondary one.

- When you click on “New page” the templates are arranged alphabetically with the first one already checked
- ActBlue is a partisan page. LWV is non
- **DON'T USE THIS TEMPLATE!**

# Here are some worth knowing about

○  Donation: Accept credit card donations. Supports goals for both donors and amount donated, automatic public recognition of recent donors, and auto-response thank you emails. Requires a merchant account.

- You have to have a donation page – this is where you create your online ticket sales and membership renewals.

○  Leaderboard: Publish one or many leaderboards to recognize your stars.

- How could you use a leaderboard to grow your league?

○ 🕒 Moneybomb:

Supporters can pledge an amount to donate at a very specific time and recruit others to do the same. Turns a fundraising drive into an event.

○ 🙋 Volunteer Signup:

Asks for detailed contact info and for any volunteer tasks or roles you may want like hosting an event, interning, or stuffing envelopes.


○ ✔ Survey:

Collect answers to your multiple choice survey questions. Frequently survey questions are used in phone banking and canvassing, but with this page, you can collect the information directly on your website too.

# What is a calendar?

- NB provides a Calendar template and an Event template. What's the difference?

☐  Calendar: Listing of upcoming events, optionally allow user submitted events, searching for nearby events, and an overview map of all events.

☐  Event: Supports rsmps, hosts, multiple paid ticket levels, tracking attendees, two-way Facebook event integration, staging locations, rsvp auto-response emails with directions, and printable lists for the door.

- Hint, they both look alike on the webpage, but Events have more options
- Calendar is cool for house parties where driving distances are a factor.



- You can play with the other page – types, too. Just remember that NationBuilder was designed to be a rich platform for political action – so be careful!!

**The End**