Bluebird Mass Email

Senate Technology Services
Helpline: 518-455-2011

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Email Writing Best Practices

This section explains how email differs from paper mail and suggests some of the best ways to make use of electronic mailings.

Generally, people do not read emails the same way they read paper mailings. Screens are bright and cannot be moved easily; therefore, do not expect people to read a lengthy mailer on their screen the way they would an actual letter. You can use formatting to alleviate this problem.

Formatting Tips

Formatting allows you to quickly direct a viewer's eye to important information within the email.

- **Bullets and Lists**
    - Use bullets and lists to draw a reader's attention to important subject matter
- **Bolding, All Caps, Font Size and Underlining**
    - Do not bold everything, instead, bold a thought, not a sentence
    - Do not type emails in All CAPS, this can be interpreted as yelling
    - Larger font sizes can grab the reader's attention
    - Limit underlining within an email, underlined words can be misinterpreted as hyperlinks
- **Keep Important Content "Above the Fold"**
    - When you read an email or a webpage, you cannot see everything at once. Where the screen ends is called the "fold." All of your most important information should be "above the fold." If the first thing they see does not interest people, they are likely not going to read the rest of it. Do not be afraid of being too brief, you can solve this by linking to more in-depth web pages. If people are intrigued by your above-the-fold content, they will click onto the hyperlink.

- **Linking**
  - Linking allows you to keep the amount of text to a minimum yet still provide all of the information you want to relay. For example, instead of copying and pasting an entire press release into the email, you can add a brief description and then add a link to the full release posted on your nysenate.gov website.
- **Do not copy from Word processors**
  - MS Word and other word processors will add unwanted formatting information to your emails. Paste content into Notepad (PC) or Text Edit (Mac) to remove the formatting first.
- **Subject Lines**
  - Subject lines should be short and to the point. (This is what will display in the recipient's inbox.)
  - Do not Repeat Yourself - Using the same subject line for every email, even if it is a weekly newsletter, accelerates drop-off rates.
  - Personalization like including a recipient's first name or last name does not significantly improve open rates. However, providing localization, such as a city name, can help.
- **Do Not Over Send**
  - Sending emails too frequently may cause readers to lose interest. This may result in them choosing to "opt out" from future email lists.

Access to Bluebird Mass Email Options

In order to obtain access to the Mass Email options within Bluebird, you must first:

- Attend the Bluebird Mass Email Mailings class at STS.
- Have the Authorization form filled out and sent back to STS.
- STS will setup your access and then you may begin sending mass emails.

Mass Email Roles

Mass email roles work in conjunction with your current Bluebird role (i.e. Office Administrator) and are administered by STS. There will be an authorization form that needs to be filled out by the Senator, Chief of Staff or Office Manager stating what role or combination of roles a person should have access to.

Below is a list of the three roles that are available:

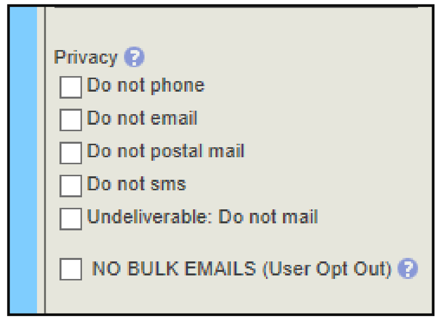
- Bluebird Mass Email **Creator -** The Creator role gives a person access to select the group of recipients to whom the mass email will be delivered to and then create the actual message.
- Bluebird Mass Email **Scheduler -** The Scheduler role gives a person access to review the message and set a scheduled date/time when the mailing should be sent out.
- Bluebird Mass Email **Approver -** The Approver role gives a person access to Approve or Reject a message. Once a mailing has been approved, it will be sent to the mail server for delivery on the scheduled date.

General Information about Bluebird Mass Email

- The basic steps to produce a mass email are:
    - Searching for Contacts
    - Setting up a Mailing Group
    - Composing the Email
    - Scheduling the date/time for delivery
    - Approving or Rejecting the message
- Once a mass email gets approved:
    - When an email is approved, it is sent to the queue until the scheduled date/time.
    - The system checks the queue for new jobs every 15 minutes and sends it to the outgoing mail program.
    - This program will slowly distribute the mail so that other email clients will not see your email account as a spammer.
- There is no limit as to how many you can send.
- The Email Seeds group is a static group updated by your office and it should contain email addresses of office staff. This group receives each mass email automatically to help verify that emails are going out.
- Send a test email to double check the mailing.
- By default, recipients will be able to reply to the Senator's email account after receiving an email. If your Senator does not want this, please contact STS.
- When running a search, the selection will pull the primary email address in a record or the email address that has the Bulk Mailings check mark selected.
- Records that are marked On Hold, Do Not Email, No Bulk Email, and/or Contact is Deceased will automatically be removed from selections.

- **Bounce backs**: If there is something wrong with an email address, (i.e. if the recipient's inbox is full, if email address is invalid or if there are network errors), an email could bounce back. If this occurs several times on the same email address, Bluebird will automatically update the "On Hold" status of that contact record by changing it to On Hold Bounce. (This will remove them from future mailings.)

- **Do Not Email Privacy option vs. NO BULK EMAILS option**
    - The Do Not Email option is used to stop NON Bulk email communication with a constituent
    - Staff will use the NO BULK EMAILS option if a constituent calls the office and asks to be removed from Bulk emails.



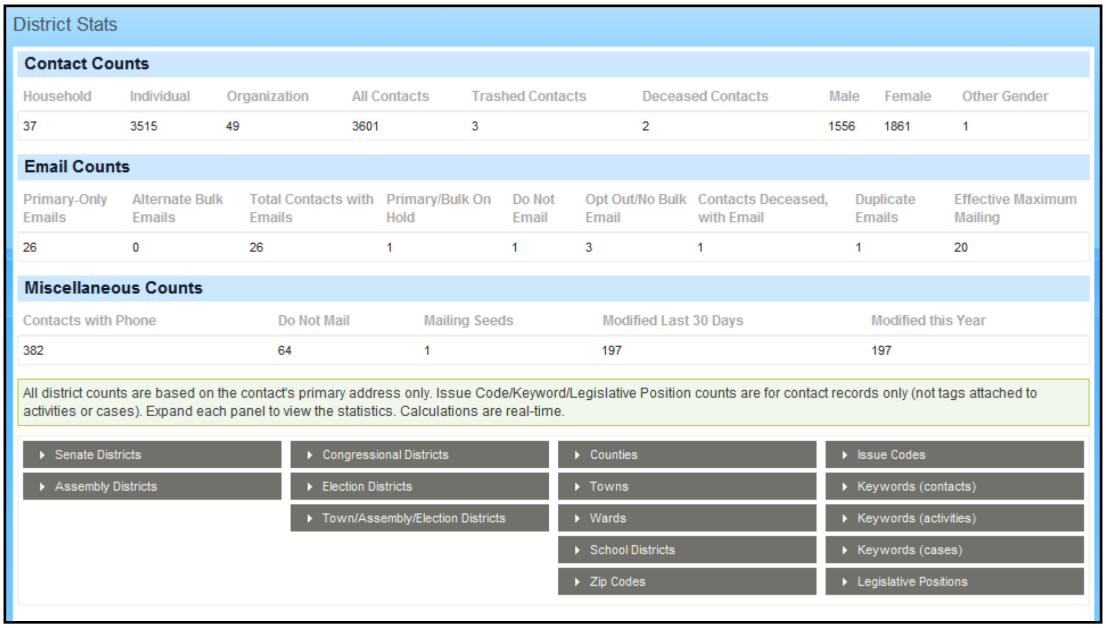
- **Unsubscribe (opt out) -** When a recipient opens a mass email and clicks the footer message. "**Click here to manage email subscriptions settings or to unsubscribe**." the following options will appear.

This unsubscribe page displays the mailing categories and the standard opt-out of all mailings option. (By default, the mailing categories are always selected.) If the recipient decides that they do not want to be included in certain mailing categories, they would just uncheck the boxes next to those categories and then click the Save Subscription Options button. If they were to click the opt-out message: "I prefer not to receive ANY email notices from Senator" a check mark would be placed on the No Bulk Emails (User Opt Out) box under Communication Preferences on their Bluebird contact record.

District Stats

The District Stats option offers various statistics for fields within Bluebird. (i.e.: Number of Issue Codes, Keywords, ED, AD etc. that have been assigned to records.) Viewing this information will be helpful to determine approximately how many contacts you may be targeting for a specific mailing.

1. From the main navigation area, click **Reports**, and then click **District Stats**.
2. Click the **arrow next to the desired option** to view the statistics.



Advanced Search

General Information

Advanced Search is used to search for virtually any information available in the database. By default, Advanced Search will retain the search criteria after you run a search.

- Clicking the **Advanced Search button** expands the search interface, where you will notice the search options are sorted by panels.

- When you select an option from any of the dropdown choices, it will appear below the dropdown in a running list. Click **x** to remove it as a selection or choose more options from the dropdown to build on your search criteria.

- Several text fields will let you set multiple criteria by entering the values separated by a comma (i.e. zip code search – 12303, 12306, and 12309).

- You may use the percent symbol (**%**) as a **wildcard** for free form text fields. The wildcard may be used before, after, or in the middle, of search text.

- When conducting an advanced search, the default **Display Results As** drop down is set to Contacts, however, you can adjust this to search for other criteria. This provides additional search options than the Find Activities or Find Cases search screens under Custom Search.

- To clear the criteria, click the **Reset Form** button on the screen. This will reload the form with all previous criteria removed.

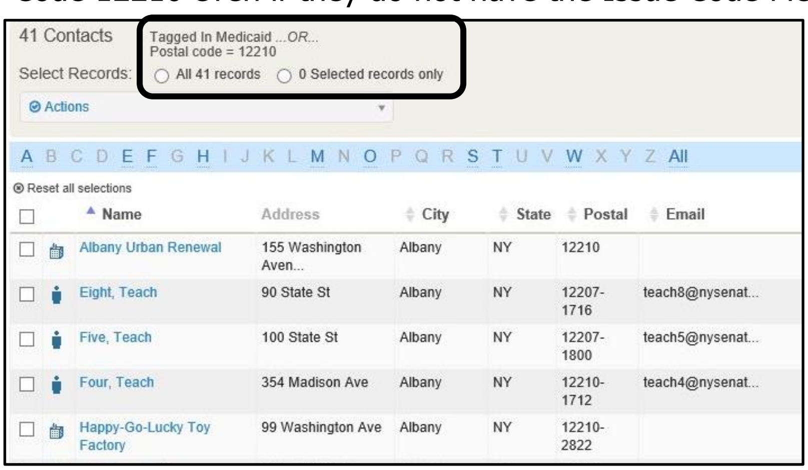
- **Search Operator field** allows you to be more or less restrictive with your searches.

For *more restrictive searches*, use the **AND** operator, see example below.

By selecting **AND** under Search Operator**, Medicaid** under Issue Code(s), and typing **12210** in the Psstal Code field the result will show all contacts with the Issue Code Medicaid who live in Zip Code 12210.

For *less restrictive searches*, use the **OR** operator, see example below.

By selecting **OR** under Search Operator, **Medicaid** under Issue Code(s), and typing **12210** in the Zip Code field the result will show contact with the issue code Aging no matter what zip code they live in plus anyone who lives in Zip Code 12210 even if they do not have the Issue Code Medicaid.



Conducting an Advanced Search

1. Click **Advanced Search**.

2. Fill out **desired criteria**.

3. Click the **Search** button to display the search results list.

4. Click on one of the following links to access a record:

   Hyperlinked name or **View**: takes you to the contact record.

   Edit: takes you to the contact record's edit screen.

5. **Contact icon**: shows basic details about the contact through a popup screen.

6. Perform one of the following steps:

   - If the number of records is **incorrect**: Click on the grey **Edit Search Criteria** panel at the top of the search results screen, **edit search criteria**, and click on **Search**. This should adjust your results. If you are still having trouble, try clicking on the **Dashboard** button to refresh your screen. Then click **Advanced Search** and run your search again.

   OR

   - If the number of records is **correct**: You can perform any of the options listed in the actions drop down menu after selecting the desired records.

Searching for Contacts with Email addresses

1. Before performing a search, click the **Dashboard** button to return to the Dashboard. (This will clear any existing search criteria.)

2. From the main navigation area, click **Advanced Search**.

3. Click in the **Complete OR Partial Email field** and type the wild card symbol **%**.

4. Click the **Search** button.

Searching for a Single Zip Code

1. Before performing a search, click the **Dashboard** button to return to the Dashboard.
2. From the main navigation area, click **Advanced Search**. If you are already in the Advanced Search screen, make sure to click on the **Reset Form** button to clear out any previous search criteria.
3. Click in the **Zip/Postal Code** field and type the **desired zip code**. (If you do not see the Zip/Postal Code field, you may have to expand the Address Fields panel in the Advanced Search screen. You can do this by clicking on the **triangle** next to **Address Fields**.)
4. Click the **Search** button.
5. The search results window will appear showing the total number of records found.

Searching for Tags

> **Note**: If you select multiple Tags, the search will retrieve records that match **any** of the choices within those selections. The search results will include **all records** that might have at least one of the Tags NOT just the records that have ALL the tags that were selected.

1. Before performing a search, click the **Dashboard** button to return to the Dashboard.
2. From the main navigation area, click **Advanced Search**. If you are already in the Advanced Search screen, make sure to click on the **Reset Form** button to clear out any previous search criteria.

Perform one or more of the following:

- Issue Codes: Click the drop down arrow under the Issue Code field and then click the **desired Issue Code**. (If necessary, repeat this step until all desired Issue Codes are selected.)
- Keywords: Click in the Keywords box and begin typing the **desired Keyword text**. When the drop down list appears, click the **correct entry** from the list. (If necessary, repeat this step until all desired Keywords are selected.)
- Positions: Click in the Positions box and begin typing the **desired Positions text**. When the drop down list appears, click the **correct entry** from the list. (If necessary, repeat this step until all desired Positions are selected.)

3. Click the **Search** button.
4. The search results window will appear showing the total number of records found.

Searching for a Single Zip code with Tags

1. Before performing a search, click the **Dashboard** button to return to the Dashboard.

2. From the main navigation area, click **Advanced Search**. If you are already in the Advanced Search screen, make sure to click on the **Reset Form** button to clear out any previous search criteria.

3. Select the desired Issue Code/s, Keyword/s, or Position/s. (See section in this manual titled **Searching for Tags** for more information.)

4. Click in the **Postal Code** field and type the **desired zip code**. (If you do not see the Zip/Postal Code field, you may have to expand the Address Fields panel in the Advanced Search screen. You can do this by clicking on the **triangle** next to **Address Fields**.)

5. Click the **Search** button.

6. The search results window will appear showing the total number of records found.

Searching for Groups

> **Note**: Remember, if you select multiple Groups the search results will include **all records** from both Groups, NOT just records that **appear in multiple groups.**

1. Before performing a search, click the **Dashboard** button to return to the Dashboard.

2. From the main navigation area, click **Advanced Search**. If you are already in the Advanced Search screen, make sure to click on the **Reset Form** button to clear out any previous search criteria.

3. Click the dropdown arrow under the Groups field and then click the **desired group**. If necessary, repeat this step until all desired Groups are selected. If you search multiple groups be aware that this type of search uses the OR logic. Contacts in this group OR this group.

4. Click the **Search** button.

5. The search results window will appear showing the total number of records found.

Searching by Gender

1. Before performing a search, click the **Dashboard** button to return to the Dashboard.
2. From the main navigation area, click **Advanced Search**. If you are already in the Advanced Search screen, make sure to click on the **Reset Form** button to clear out any previous search criteria.
3. Open the **Demographics area** and then click the **desired gender** option.
4. Click the **Search** button.
5. The search results window will appear showing the total number of records found.

Searching by Gender within a Single Zip Code

1. Before performing a search, click the **Dashboard** button to return to the Dashboard.
2. From the main navigation area, click **Advanced Search**. If you are already in the Advanced Search screen, make sure to click on the **Reset Form** button to clear out any previous search criteria.
3. Click in the **Zip/Postal Code field** and type the **desired zip code**. (If you do not see the Zip/Postal Code field, you may have to expand the Address Fields panel in the Advanced Search screen. You can do this by clicking on the triangle next to **Address Fields** this should open the panel.)
4. Open the **Demographics area** and then click the **desired gender** option.
5. Click the **Search** button.
6. The search results window will appear showing the total number of records found.

Searching for Phone Numbers

1. Before performing a search, click the **Dashboard** button to return to the Dashboard.
2. From the main navigation area, click **Advanced Search**. If you are already in the Advanced Search screen, make sure to click on the **Reset Form** button to clear out any previous search criteria.
3. Type in the desired Phone Number in the **Phone Number** field towards the bottom of the **Basic Criteria panel** of the Advanced Search screen.
4. Click the **Search** button.
5. The search results window will appear showing the total number of records found.

Note: To search for all phone numbers currently in your database use the Bluebird wildcard (%), in this field and click Search. The search results will also allow you to sort by the phone number column. Since this is an Advanced Search, the search results will also have the actions drop down menu. While searching for phone numbers in Advanced Search punctuation and spaces are ignored.

Searching by Street Address

One common place to use the wildcard (%) in Bluebird is within the street address field. For example, **%State%St%** will find all address with State in the value. It is recommended to use the wildcard in place of typing out text such as Street. When records are verified by the USPS they are abbreviated (i.e. Street becomes St). Since a Street Address search uses "strict" logic, (meaning it has to find the EXACT match), your selection might be off because it will not find certain records.

1. Before performing a search, click the **Dashboard** button to return to the Dashboard.
2. From the main navigation area, click **Advanced Search**. If you are already in the Advanced Search screen, make sure to click on the **Reset Form** button to clear out any previous search criteria.
3. Click in the **Street Address** field and type the **desired address**.
4. Click the **Search** button.
5. The search results window will appear showing the total number of records found.

Searching by District Information

District Information that is available to search on is Congressional District, Senate District, Assembly District, Election District, County, Town, and School District.

1. Before performing a search, click the **Dashboard** button to return to the Dashboard.
2. From the main navigation area, click **Advanced Search**. If you are already in the Advanced Search screen, make sure to click on the **Reset Form** button to clear out any previous search criteria.
3. Click in the desired **District Information** field and type the **desired data**. To search multiple district information, add a comma between the data (i.e. 25, 26, and 27).
4. Click the **Search** button.
5. The search results window will appear showing the total number of records found.

Searching by Birth Date Range/Month and Gender

1. Before performing a search, click the **Dashboard** button to return to the Dashboard.
2. From the main navigation area, click **Advanced Search**. If you are already in the Advanced Search screen, make sure to click on the **Reset Form** button to clear out any previous search criteria.
3. Open the **Demographics area**. To search by a specific date, click on the drop down menu under **Birth Dates** and select the desired date from the preset list or a desired range. To search by month, click on the drop down menu under **Birth Date Month** and select desired month.
4. Within the **Demographics area,** click the desired **Gender** option.
5. Click the **Search** button.
6. The search results window will appear showing the total number of records found.

Searching for Employees of an Organization

Sometimes you might want to send a letter to all employees of an Organization. To do so, perform the following steps:

1. Before performing a search, click the **Dashboard** button to return to the Dashboard.
2. From the main navigation area, click **Advanced Search**. If you are already in the Advanced Search screen, make sure to click on the **Reset Form** button to clear out any previous search criteria.
3. Open the **Relationships panel**. Click the **drop down arrow** under Relationship Type and select **Employee of**.
4. In the **Target Contact** box, type the name of the **Organization**.
5. Click the **Search** button.
6. The search results window will appear showing the total number of records found.

> **Note**: When creating or editing contact records fill in the Current Employer field and Job Title field (located under Communication Details). By doing this, it will automatically create an Employer/Employee Relationship between these records. Also, if you want to send postal mail to a person at their work address, create an additional address field within their record. Make sure to label the new address as the Work location type.

Searching by City

1. Before performing a search, click the **Dashboard** button to return to the Dashboard.
2. From the main navigation area, click **Advanced Search**. If you are already in the Advanced Search screen, make sure to click on the **Reset Form** button to clear out any previous search criteria.
3. In the **Address Fields** panel in Advanced Search, click in the **City** field and type the **desired City**.
4. Click the **Search** button.
5. The search results window will appear showing the total number of records found.

Custom Search Menu

Find Cases

This search allows you to find any Cases by using the following search options:

- Cases by Constituent Name or Email
- Case Start/End Dates
- Case Type
- Status
- Case Keywords

Find Activities

This search allows you to find any Activities by using the following search options:

- Name or Email of the Contact (With), Employee Assigned to (Assigned To), or Employee who added the Activity (Added By)
- Activity Type
- Activity Dates
- Activity Subject
- Activity Status
- Activity Details
- Activity Keywords
- Place of Inquiry
- Activity Category
- Website Survey

Find Anything Search

This is a link to the Find Anything search screen, for more information see section titled **Find Anything** within this manual.

Proximity Search

This search is helpful to find records residing in the same postal code. You can also search for records within a radius of a specific address.

1. Click **Custom Search** menu, then click **Proximity Search**.
2. Fill in **desired information**. For the best results fill in the Street Address field. If using only the Postal Code field the search will be based off the middle of the postal code.
3. Click the **Search** button. The search results window will appear showing the total number of records found.

Birthday Search

Allows you to find records that share the same birthday, birth year, or age. You can also search for records within a certain birth month.

1. Click **Custom Search** menu, then click **Birthday Search**.
2. Fill in **desired information**.
3. Click the **Search** button. The search results window will appear showing the total number of records found.

Include/Exclude Search

Allows you to include or exclude certain groups from your results. A common reason for this is if you want to send a district wide constituent mailing but would like to exclude all members of the press that you have added to your Bluebird database. If you have previously labeled these records with the Press & Media Contacts Individual Category and then created a Group based off this selection, you will be able to exclude them from the mailing.

1. Click Custom Search menu, then click Include/Exclude Groups/Tag.
2. From the Include/Exclude fields, select the desired Group/Tag to Include and Exclude.
3. Click Add to add into the search results box. If you need to remove an option, click it from the search results box and then click Remove.

> **Note**: This type of search uses the **AND** logic by default, uncheck the check box if you want to make it an **OR** search.

4. Click the **Search** button. The search results window will appear showing the total number of records found.

Tag/Group Changelog Search

This search allows you to find any Tag or Group that was Added or Removed/Disabled to a record on a certain date. You can also narrow this down by who altered the record.

Tag Count Search

Use this search to generate counts for Tags based on date ranges for when the contacts were tagged.

Web Activity Search

You can search contact website activity records from the nysenate.gov website. You can search contact name, date range, and type of website activity.

Groups

Understanding Groups

Groups are used to collect and organize records. Within Bluebird, you can create either Static Groups or Smart Groups.

- **Static Groups** provide a way for you to organize contacts that might not have similar criteria. In this case, you will need to look up each contact record to add to a specific static group.

  For example, you might want to keep track of principles within a school district. You would create a static group and then manually add contacts to the static group you created. This can be done through the contact's Groups tab or from the Manage menu on the main navigation area.

- **Smart Groups** provide a way for you to organize your records by criteria. Smart Groups are created after running a search, where the search criteria create the rules for the group. Saving a smart group does not save the records in the result list; it saves whatever criteria you defined in the search. That means every time you view the smart group you are pulling an updated list of contacts who meet that criteria.

  For example, if you searched for all female constituents in Albany, you could save that search for future use and title it Albany Women Smart Group. If another staff person enters a new contact that is female and lives in Albany, she would appear in the Albany Women Smart Group results the next time it is run because she meets the criteria.

Working with Static Groups

Creating a Static Group from the Create Menu

1. From the main navigation area, click the **Create** menu, click **New Group**.
2. Type a **name for** the group.
3. If desired, type a **description**. *Note: a group's description only shows up on the Manage Group screen.*
4. If planning to send a mass email to this group **check** the **email list** box.
5. If desired, choose a **Parent Group**.
6. Click **Continue**.

Creating a Static Group from a Search

1. Search the database to find the **desired common** records.
2. In the search result window, click **All** or **Selected records only**. (If you choose Selected records only, you will need to click the box to the left of each record you want in the selection.)
3. After selecting the desired records, click **actions**, then click **Group** - **add contacts.**
4. Click radio button in front of **Create New Group**.
5. In the Group Name box, type a **name** for the group.
6. If desired, type a **description**. *Note: a group's description only shows up on the Manage Group screen.*
7. If planning to send a mass email to this group **check** the **email list** box.
8. If desired, choose a **Parent Group**.
9. Click on **Add to Group**.

Adding a Single Contact to a Static Group

1. Search the database to find the desired **Contact record** you want to add to the static group.

2. From the contact record view screen, click the **Groups tab**.

3. Click **Add to a group** and click the **desired group**.

4. Click **Add.**

You will now see the Group listed in the Contact Record's Groups tab under Regular Groups.

Adding Multiple Contacts to a Static Group

1. Search the database to find all of the desired **Contact records** you want to add to the static group.

2. Select the **desired records** and then click **Actions**.

3. Click **Group - add contacts**.

4. Make sure the radio button is for **Add Contacts to Existing Group** is selected.

5. Click the **down arrow** across from Select Group and then click on the **desired group**.

6. Click **Add to Group.**

Editing a Static Group

1. From the main navigation area, click on the **Manage menu**, and then click **Manage Groups**.

2. Click on **more**, across from the Group that you would like to edit.

3. When you click on **more**, a menu will appear that gives you three options: **Settings**, **Disable**, or **Delete**, click on **Settings**.

4. Make **desired changes**.

5. When done, click **Save**. A message pop up box will appear to let you know the Group has been saved.

Removing a Contact from a Static Group

1. Search the database to find the desired **Contact record** you want to remove from the static group.

2. From the contact record view screen, click on the **Groups tab**.

3. Click **Remove** across from the Group you want to remove.

When someone has been removed from a Group, they are not deleted. Instead, they are placed into a Past Groups section on the contact record's Groups tab. They can be added back by clicking **Rejoin Group**.

Disabling a Static Group

1. From the main navigation area, click on the **Manage menu** and then click **Manage Groups.**

2. When the list of Groups appears, click **More** across from the Group you want to disable.

3. Click **Disable** from the menu. Click **OK** at the prompt.

The Disabled group will appear in a lighter font shade (see Guilderland Central School District below).

The next time you return to the Manage Groups screen, you will **not** be able to view disabled groups until you apply the check mark next to Disable in the upper right hand corner.

Note: To Enable an Inactive Group: click on the **Manage menu**, then click on **Manage Groups**, remove the check mark from Enable and apply the check mark for Disable, click **Search**. Then across from the Group, click **More**, **Enable**, click **OK** at the prompt.

Deleting a Static Group

1. From the main navigation area, click on the **Manage menu** and then click **Manage Groups.**

2. When the list of Groups appears, click **More** across from the Group you want to delete.

3. Click **Delete** from the menu.

4. Click **Delete Group**. The message popup box will indicate that the Group has been deleted.

Adding Staff Members to the Email Seeds Static Group

To add one person at time:

1. Search the database to find the **office staff record** you want to add to this group.
2. While looking at the record of the office staff member, click on the **Groups** tab.
3. Click the **dropdown arrow** across from Add to a group and click **Email Seeds** from the list.
4. Click **Add.** This contact is now added into this group.

To bulk add

1. Click in the Find Contacts search box type **%@nysenate.gov** (This will narrow down your search to help find staff records.)
2. Press **Enter**.
3. In the search result window, click **All** or **Selected records only**. (If you choose Selected records only, you will need to click the box to the left of each record you want in the selection.)
4. After selecting the desired records, click **Actions**, then click **Group - Add Contacts**.
5. Across from Select Group, click the down arrow and choose **Email Seeds**.
6. Click **Add to Group**.
7. A message will appear at the top of the screen to let you know how many contacts were added to the Group.

Working with Smart Groups

Creating a Smart Group

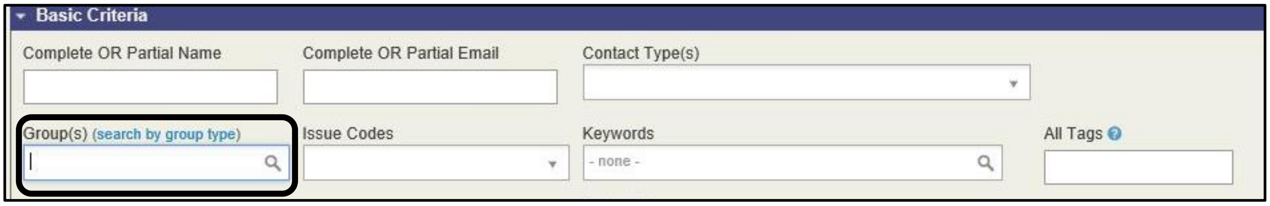
1. Search the database to find the **desired common** records.

> **Note**: The Find Anything, Find Cases, and Find Activities search options will not allow you to create a group from your search results.

2. In the search result window, click **All** or **Selected records only**. (If you choose Selected records only, you will need to click the box to the left of each record you want in the selection.)
3. Click **Actions**, then click **Group – create smart group.**
4. Type a **name** for the Smart Group. (**Tip**: When you create a new Smart Group, it will appear in the listings with the Static Groups. Therefore, when viewing the list of groups, there is no way to determine what type of group it is. When entering the name of a Smart Group you might want to put a notation of Smart Group within the name.)
5. If desired, enter in a description.
6. If planning to send a mass email to this group **check** the **email list** box.
7. Click **Save Smart Group**.
8. A message will display in the message area that the Smart Group has been created. Click **Done**.

Viewing a List of Contacts in a Smart Group

1. From the main navigation area, click **Advanced Search**.
2. Under the Basic Criteria section, click the **dropdown arrow** under Groups.



3. Click the **desired Group**.
4. Click **Search** to display a list of names.

Editing a Smart Group Name, Description or Email List status

1. From the main navigation area, click **Manage**, and then click **Manage Groups**.
2. Click on **More**, across from the Group that you would like to edit.
3. When you click on **More**, a menu will appear that gives you three options: **Settings**, **Disable**, or **Delete**; click on **Settings**.
4. Make **desired changes**. When done, click **Save**. A message pop up box will appear to let you know the Group has been saved.

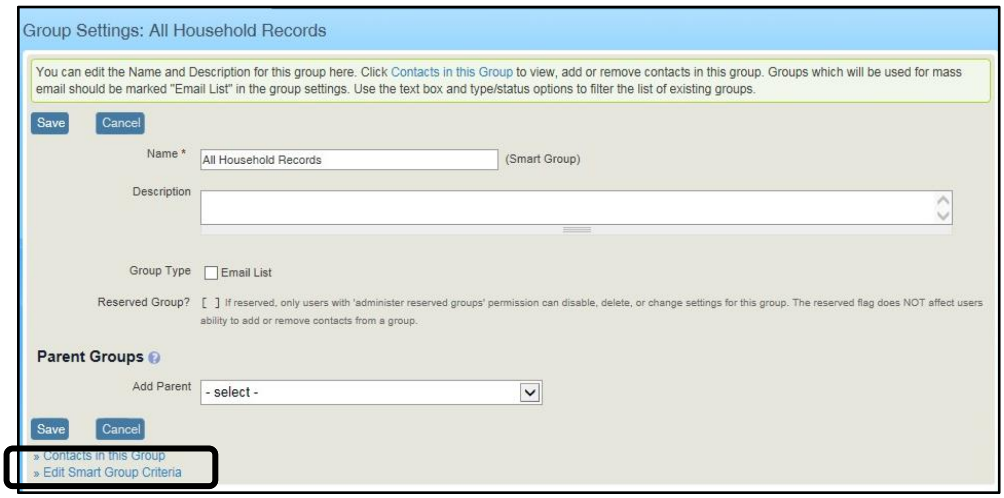
Editing Smart Group Criteria

1. From the main navigation area, click on the **Manage menu**, and then click **Manage Groups**.

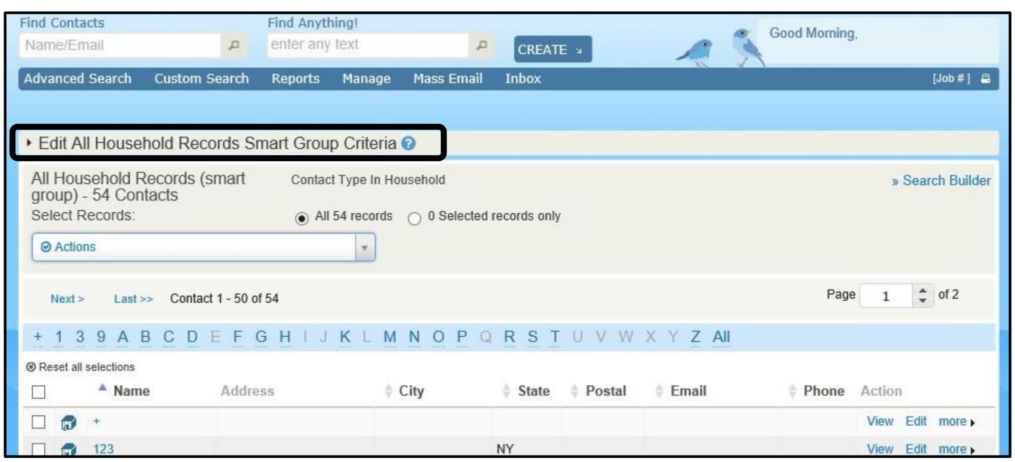
2. Click on the **More** link, across from the Smart Group that you would like to edit.

3. When you click on the **More** link, a menu will appear that gives you three options: Settings, Disable, or Delete; click on **Settings**.

4. On the Group Edit Screen, click on **Edit Smart Group Criteria** in the bottom left of that box

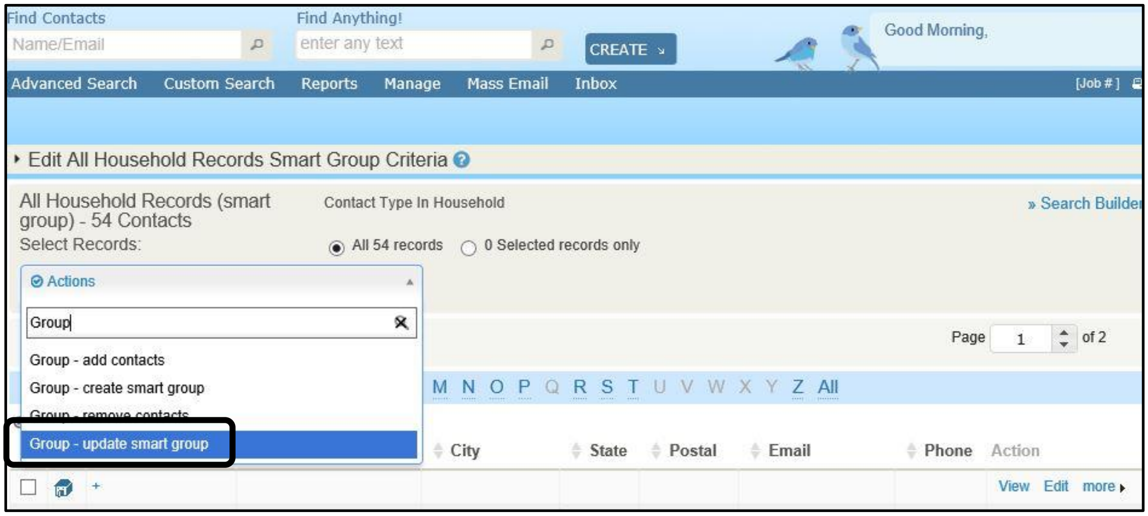


5. On the next screen, you will see the Advanced Search results for the Smart Group that you are viewing. Click on the expandable panel titled **Edit [Group Name] Smart Group Criteria** at the top of the screen. This will open the Advanced Search panel.

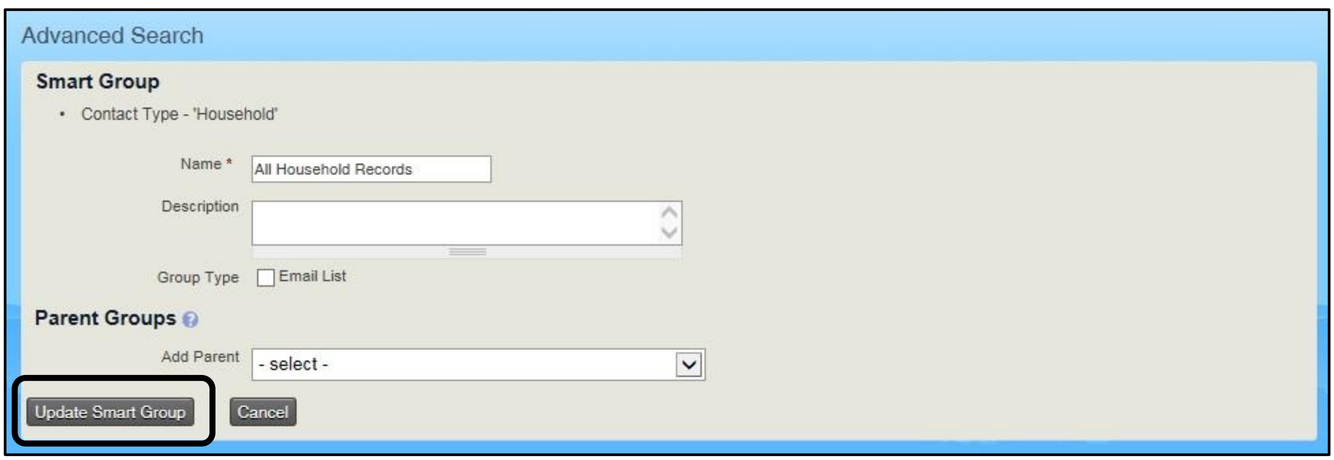


6. Make adjustments needed to the Advanced Search criteria and then click **Search**.

7. The screen will refresh with an updated view of the Advanced Search results page, select the radio button for All # records, click in the Actions box and in the white box that appears, type **Group**. In the filtered list select **Group - update smart group**.



8. On the Smart Group page, select **Update Smart Group** button in the bottom corner of the screen.

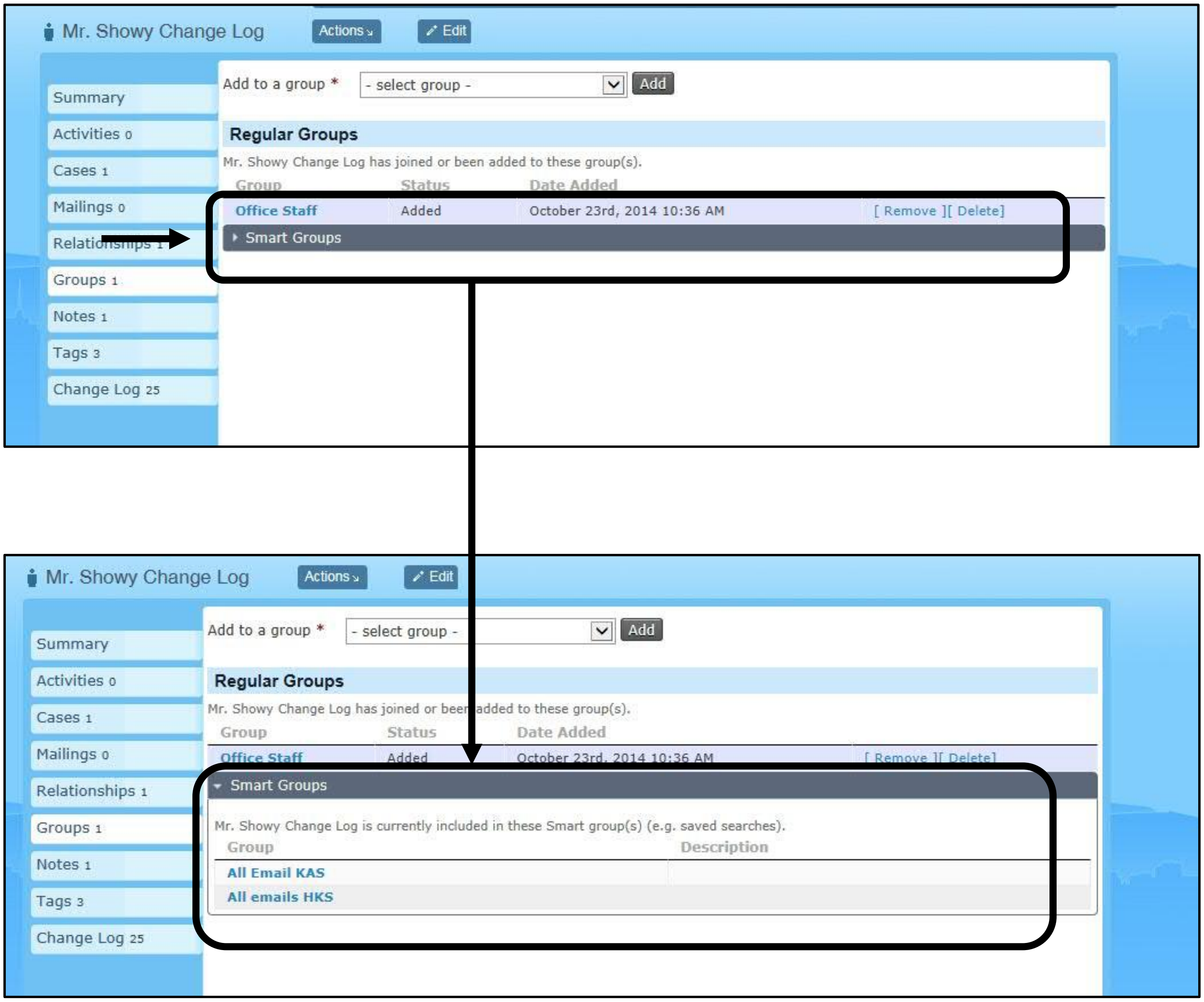


9. You will see the button change to Processing, and then a message popup box will tell you the Smart Group has been saved. On the next page, click **Done**.

10. This will bring you back to the Edit Advanced Search criteria page. You can click **Dashboard** to clear this page.

Wondering if a contact is in a specific Smart Group?

Go to the desired **Contact** record and click on the **Groups** tab. On the Groups screen, you will see an expandable panel titled **Smart Groups**. Expand this panel by clicking on the **triangle** to the left of Smart Groups. The panel will expand and show all Smart Groups that the contact currently meets.

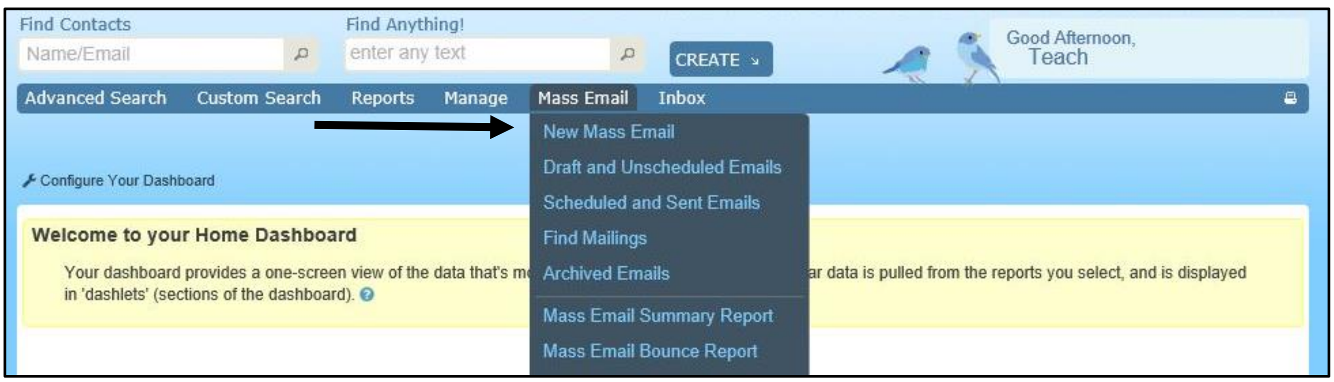


Creating a Message – Define Mailings Tab

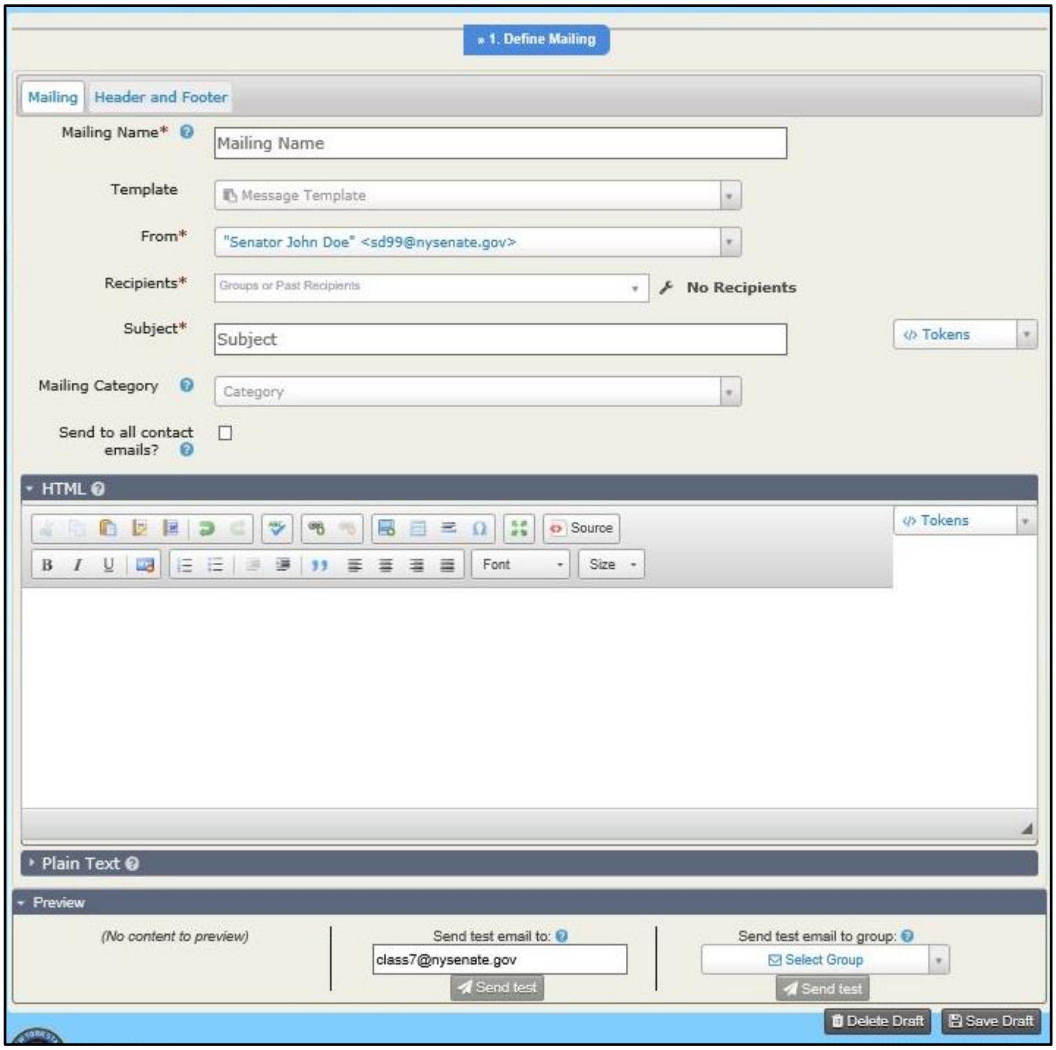
If you have **Creator** access you will have the ability to create a mass email message, if you do not see the menu called Mass Email when you are logged into Bluebird this means you do not have the proper role assigned to your account. Speak with your Bluebird Office Administrator within your office to gain the proper access.

Note: Before you create your Mass Email you must add your recipients into a **Group** and have the **Email List** option selected in order to see them on this screen.

When you are ready to create your Mass Email, in the main navigation area, click **Mass Email**, and then click **New Mass Email**.



When the **New Mass Email** screen appears, there will be a tab called **Define Mailing**. Within this screen, there are several required fields.



- Click in the **Mailing Name** field and type a unique name. This name will only be seen in Bluebird and will not be seen by the recipient of the email.

- The **From** field will always be auto-filled with the Senator's email address.

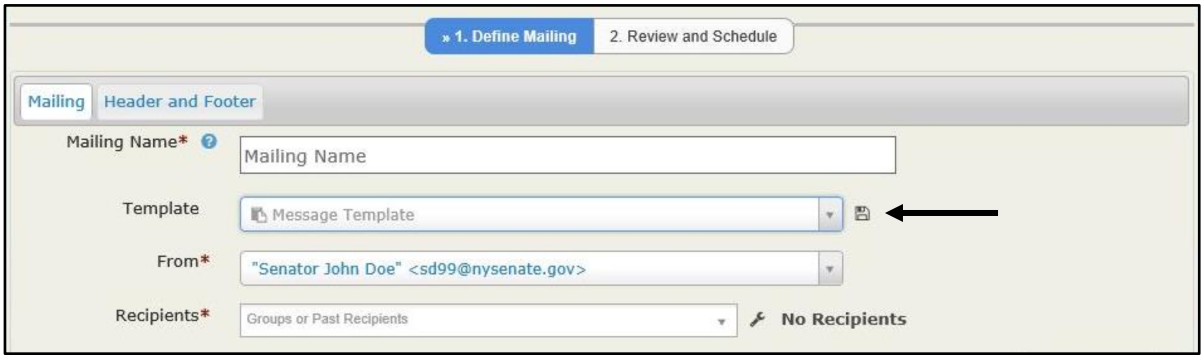
- Click within the **Recipients** box to select the desired group(s) of recipients. The Email Seeds group will automatically be added at the end of the process. If desired, you can also choose to exclude groups from this box as well. This box will also allow you to include or exclude Recipients from previous mailings. The number of Recipients will appear next to this box. This is an approximate number of recipients based on the Group(s) that you have selected.

- The **Subject** field is what the recipients of the email message will see in the Subject Line of their email inbox.

Templates

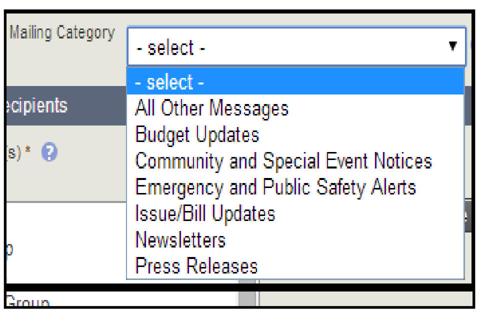
Templates is a way for you to be able to store templates for similar email messages. An example of why you would want to save a template would be if you send out a monthly newsletter with the same formatting, you can create the content and save it as a template. Once saved you can continue to reuse templates as many times as you want.

To create a template fill in desired information on the Define Mailing tab and click on the save icon to the right of the Template box. A Save Template box will appear. Name the Template and click Save. Once Saved you can retrieve a template at any time by going to the Define Mailing tab of a mailing and selecting the Template from the Template box.

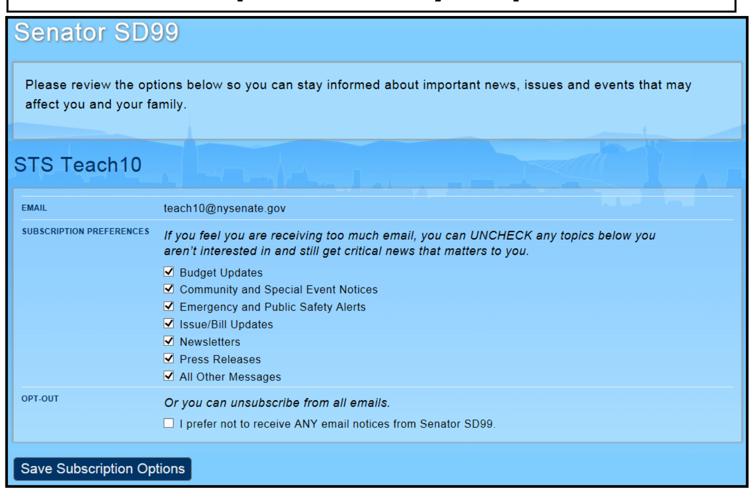


Mailing Categories

The **Mailing Categories** is used to assign a mailing category to a mass email. This feature is optional and works with the Unsubscribe feature the recipient sees. If your office does not use the mailing categories option, all emails will automatically be grouped under the "All Other Messages" category.

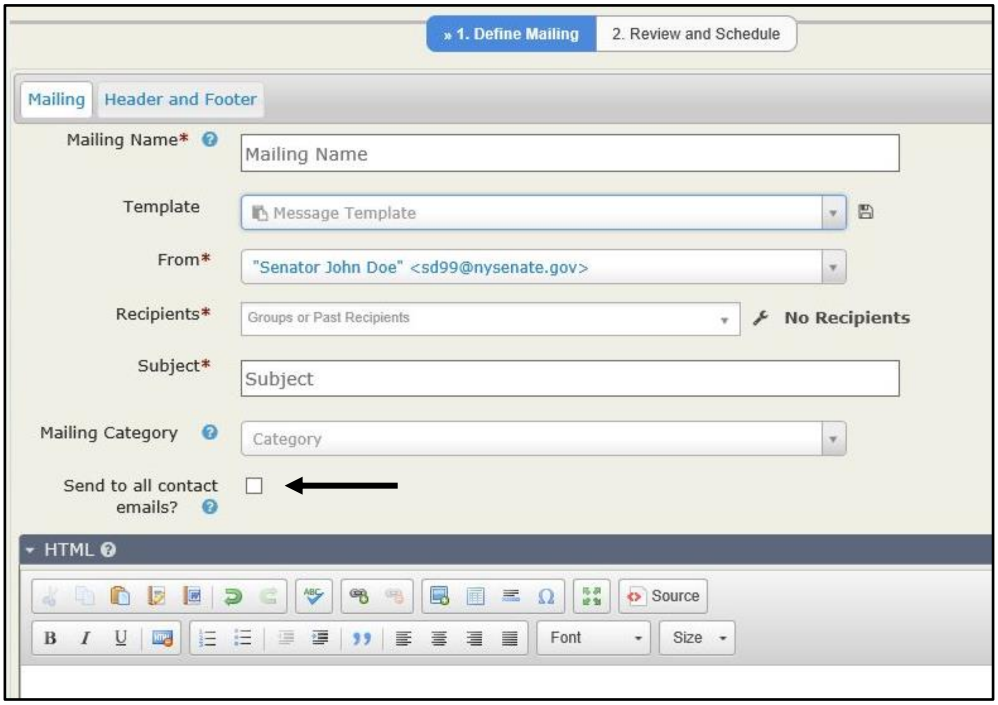


Unsubscribe options seen by recipients



Send To All Contact Emails Option

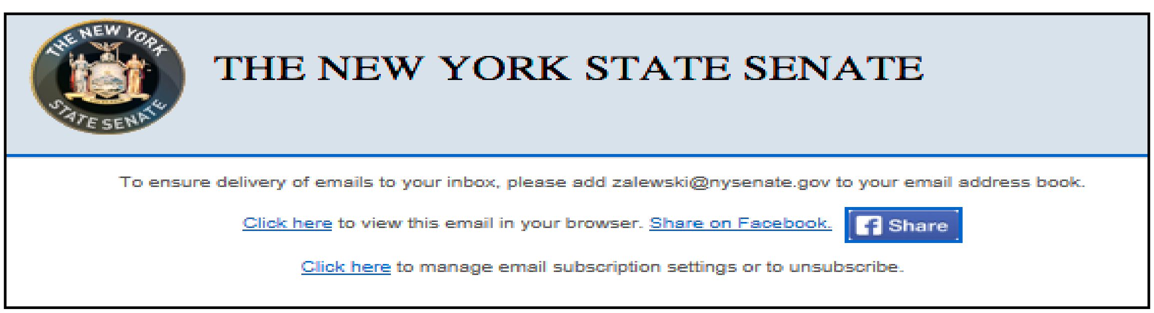
The **Send to all contact emails?** option may be used if a recipient has multiple email addresses within a contact record and you want to send to all of them.



Mailing Content

The mailing content uses a hidden template that contains a Header (Senator's picture, Senator's name and district information) and a Footer (office address and unsubscribe link). This information cannot be edited, but you can add your own text to the body of the email.

Note: The above image is displayed as it appears during the creation of the email within Bluebird. The image below displays the footer as it appears once a recipient receives the mailing.

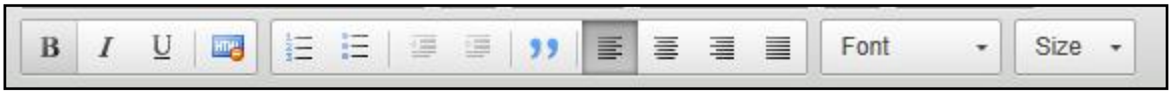


Composing the Email

To compose the email click in the HTML box. There are several tools to help you create your message.

- If you are **pasting** text from a software program such as Word, make sure to use the "Paste as plain text or Paste from Word icon" or use a program such as Note Pad. You should never paste directly into this box because you could end up carrying over code from another program that might interfere with the formatting of your message.

- **Add format to a message**: If desired, use the format options to add formatting such as Bold, Italics, and Underline or change the Font and font size.



- **Add a Link to a message**: Sometimes you might want to direct your constituents to a particular webpage. Make sure your cursor is in the place you want the link to appear. Click the **Link icon**, click in the **URL box**, either **type** or **copy and paste** the URL. If necessary, you can click the Protocol drop down and select a secure web link. Click **OK** when done. There is also an Unlink icon to remove the link.

- **Add an Image to a message**: To add an image to a message you must first upload it to the Bluebird Image server. There are two ways to do this.
    - While composing a mass email, click the **Image icon**, when the Image Properties box appears, click the **Upload** tab. Click **the Browse button**, select the image, click **Open** and then click the **Send it to the Server** button to upload.
    - You can upload an image to the image server at any time by going to the **Manage** menu and then clicking on **Manage Images**. From here you can click on **Upload** and select the image from your computer you would like to add to the server. Click **Open**. The screen will bring you back to the server and you should see your image now loaded.
    - To use an uploaded image, click the **Image** icon, click the **Browse Server button**, double click the **image** you want to use and then click **OK**.

Preview

You can preview the email you are working on by clicking the Preview as HTML link under the Preview panel within the Define Mailing Tab of Mass Email. This will allow you to test any hyperlinks within an email and to look at any images added to the email.

Test Email

Before sending out a mailing you have the option of sending a copy to one or more people. This would be useful to check to make sure the mailing looks the way you expect it to. You may want to send a copy to yourself or other staff members.

1. Type the **email address of the person** you wish to send to in the Send test email to box; you may add more than one email address by putting a comma and space between email addresses.

   OR

2. In the Send test email to group box, click the **drop down arrow** and **select the group**. *Caution: this is a full list of ALL groups within your Bluebird database, be careful when selecting a group.*

3. Click **Send a Test** button. (The word Draft appears in the Subject of the message.)

Send to Scheduler

When you are finished composing your mass email, you will see the following options as buttons along the bottom of the screen:

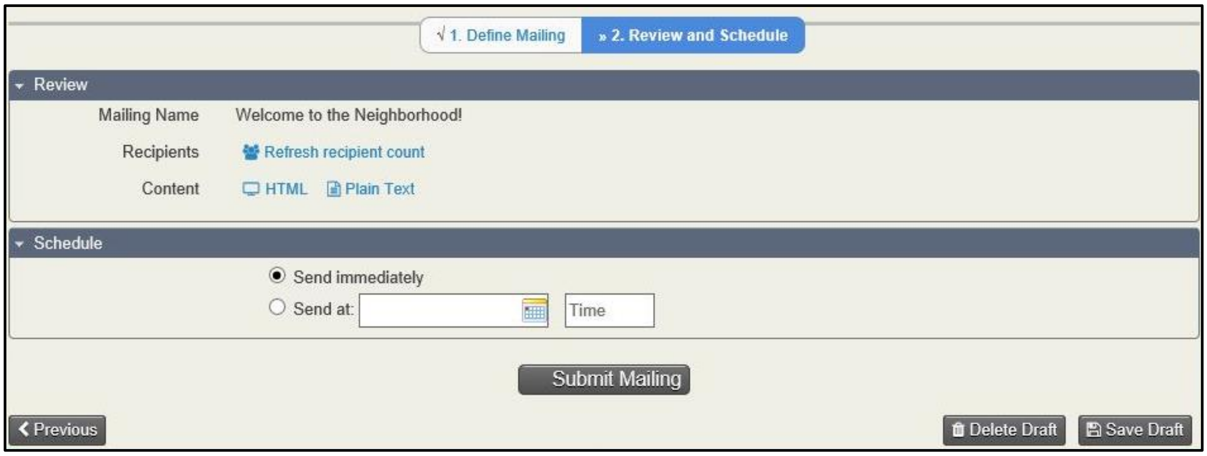
- **Next** if you have the proper role this button will continue the Mass Email process and bring you to the Review and Schedule tab, which allows the Scheduler to pick a date and time for the email to go out
- **Delete Draft** will remove the draft from the database completely
- **Save Draft** will save the mass email and put it into Draft and Unscheduled Emails for the Scheduler to be able to continue the mass email process

Scheduling a Message – Review and Schedule Tab

1. From the main navigation area, click **Mass Email**, and then click **Draft and Unscheduled Emails**.

2. Click the word **Continue** across from the mailing you need to schedule.

3. When the **New Mass Email** screen appears, there will be a tab called **Review and Schedule.** Within this screen, there are two panels: Review and Schedule.



Review: This panel allows you to view the Mass Email message if you are not the Creator and have not seen it. To view click on HTML next to Content. You can also see the Recipients list by clicking on the link next to Recipients.

Schedule: This panel allows the Scheduler to pick a date and time the email will be sent out. Your options are either Send Immediately or Sent at [insert date] [insert time].

Send to Approver Options

The options at the end of the screen will be the following:

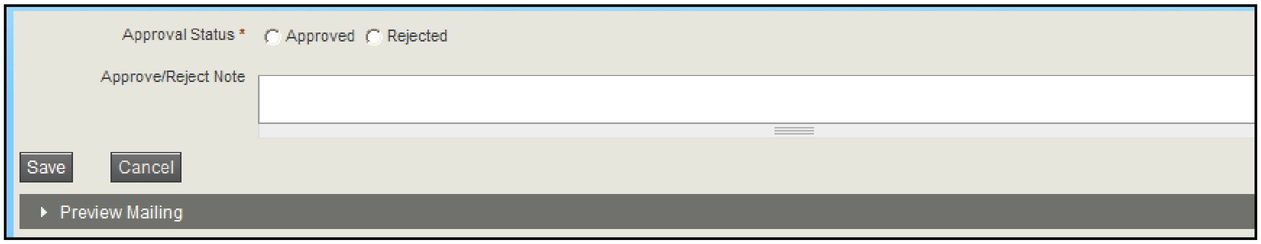
- **Previous**: If you have the proper role, you will see this option, which allows you to view the Define Mailing tab
- **Submit Mailing**: This button allows you to send the mass email to the Approver to either approve or reject the mass email
- **Delete Draft** will remove the draft from the database completely
- **Save Draft** will save the mass email and put it into Draft and Unscheduled Emails for the Scheduler to be able to continue the mass email process

Approving a Message – Approver Role

1. From the main navigation area, click **Mass Email**, and then click **Scheduled and Sent Emails**.

2. Click **Approve/Reject** across from the desired Mailing.

3. If desired, click the **Preview Mailing** option to view the message.



4. Across from Approval Status, click one of the follow:

   - **Approved**: If you choose this option, the mailing will be sent out on the scheduled date/time.

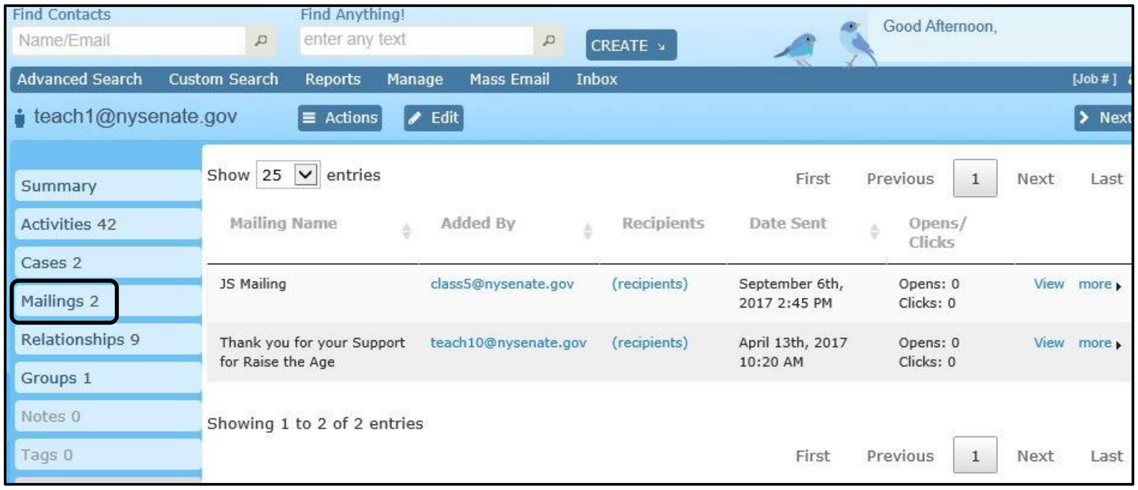
   - **Rejected:** If you choose this option, the mailing goes back into the Draft and Unscheduled Mailings.

5. Click **Save.**

Note: After a scheduled email has been Approved or Rejected the Creator of the message will receive an email in their Senate email to let them know.

Mailings Tab

After a mass email has been sent out, a mass Bulk Email Activity will be created in each of the recipients' records and it will reside on the Mailings tab off the contacts record.



Archived Mass Email Mailings

To keep the Scheduled and Sent Emails listing cleaned out, you can archive (move) completed mailing from this listing to the Archived Emails listing. You can still resend to an archived email; it is only found in a different location on the menu.

Archiving an email

1. From the main navigation menu, click **Mass Email**.
2. Click **Scheduled and Sent Emails**.
3. Across from the desired mailing, click on **More** ->**Archive**.
4. At the **Are you sure you want to archive this mailing**? prompt, click **OK**.
5. This mailing is now located under the **Archived Emails** option.

Mass Email Reports

There are several email reports available through Bluebird Mass Emailing. Each one gives specific information about your emails that you send out through Bluebird.

Mass Email Summary Report

The Mass Email Summary Report breaks down emails by name and informs the user of the number of intended recipients, delivered emails, bounced emails, and opened emails within a specific date range (by default it selects one year). It is always a good idea to check this report after sending out an email to see how many recipients received the email.

Mass Email Bounce Report

The Mass Email Bounce Report keeps track of all bounces that have happened to date within the Senator's Bluebird database. Some information found within the report is the bounce reason and the email address that the bounce happened with. If the recipient number does not match the number, you had in mind for a specific mailing, make sure to look at this report. It is possible that there were emails that bounced during your mailing, which means your intended recipient did not receive your email. Some bounce reasons will automatically put a contact's email address "On Hold," if this happens you will have to manually go into the record and change it to a correct email address.

Mass Email Opened Report

The Mass Email Opened Report displays contacts who have opened an email from your mailing. The only way of reporting this through the Bluebird Mass Email system is if the person selected "Show Images" within their mail provider. This report is not always accurate and is less reliable.

Mass Email Clickthrough Report

The Mass Email Clickthrough Report records clicks from the recipients from each email sent out. A click is recorded when a recipient clicks on a link within the email.

Mass Email Detail Report

The Mass Email Detail Report lists all mass emails that have been sent out from your office sorted by Contact Name. This report also shows delivery status, opt-out information and the mailing name.

Miscellaneous

Using the Notepad Text Editor

Notepad is a plain text editor that is loaded on all Senate PC's. Follow the steps below to create a desktop shortcut for this program:

1. Click the **Start button**.
2. In the *Search programs and files box*, type **Notepad**
3. Notepad will appear under the Programs section on the box.
4. To use this program, you can click on it from the list or to create a desktop shortcut you can left click and drag it onto the desktop.

Working with Notepad

1. Copy the **text** that you want to bring over into Bluebird.
2. Open Notepad and **Paste** text.
3. Copy the **text** from Notepad.
4. Then **Paste** into Bluebird.

Keyboard shortcuts

Below are the keyboard shortcuts for copy, cut, paste and select all.

Ctrl-C for copy

Ctrl-V for paste

Ctrl-X for cut

Ctrl-A for select all text in a document