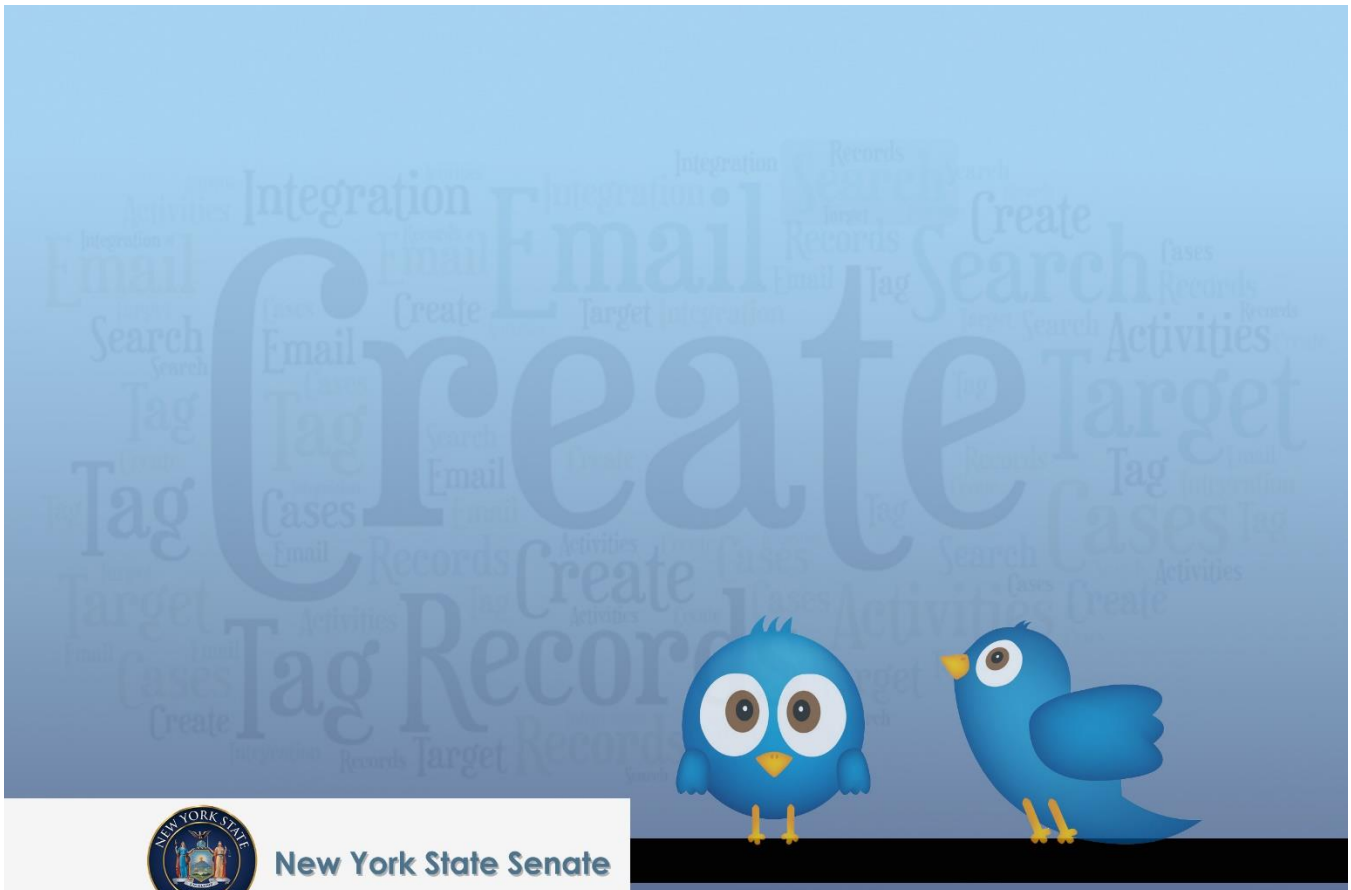

New York State Senate

BLUEBIRD
Mass Email

Constituent Relationship Management Software

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.

Mass Email Roles and Permissions

We recommend users take a formal mass email class or has reviewed the on-demand training videos before sending a mass email.

Mass Email Roles

Mass email roles work in conjunction with your current Bluebird role. Your office admin can assign these roles.

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

- Mailing **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.
- Mailing **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.
- Mailing **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

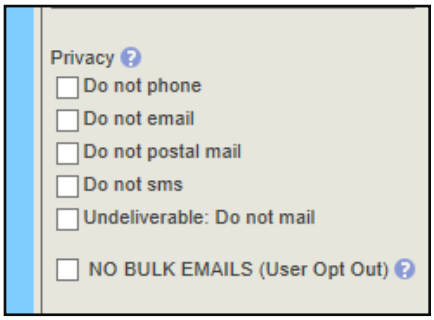
- The basic steps to produce a mass email are:
    - Searching for Contacts
    - Setting up a Mailing Group
    - Composing the Email
    - Scheduling the date/time for delivery
    - Approving or Rejecting the message
- Once a mass email gets approved:
    - It is sent to the queue until the scheduled 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 spam.
- 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.)

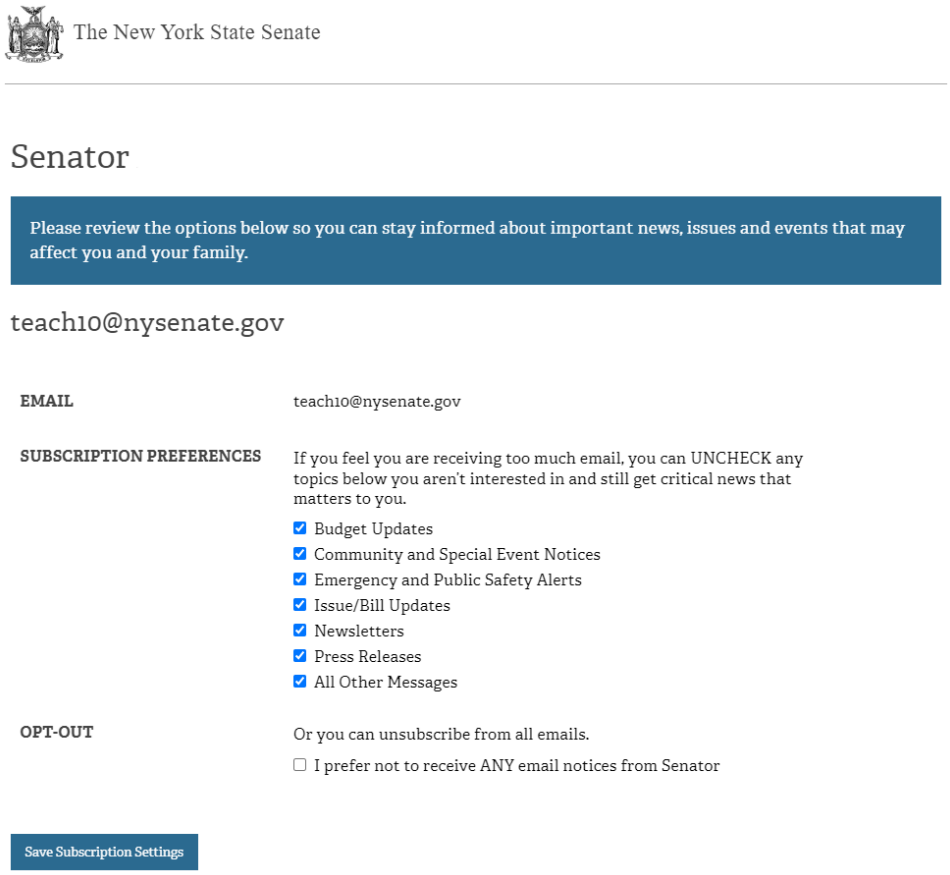
- **Do Not Email Privacy option vs. NO BULK EMAILS option**

    - 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 your email subscriptions settings or to unsubscribe**." the following options will appear.



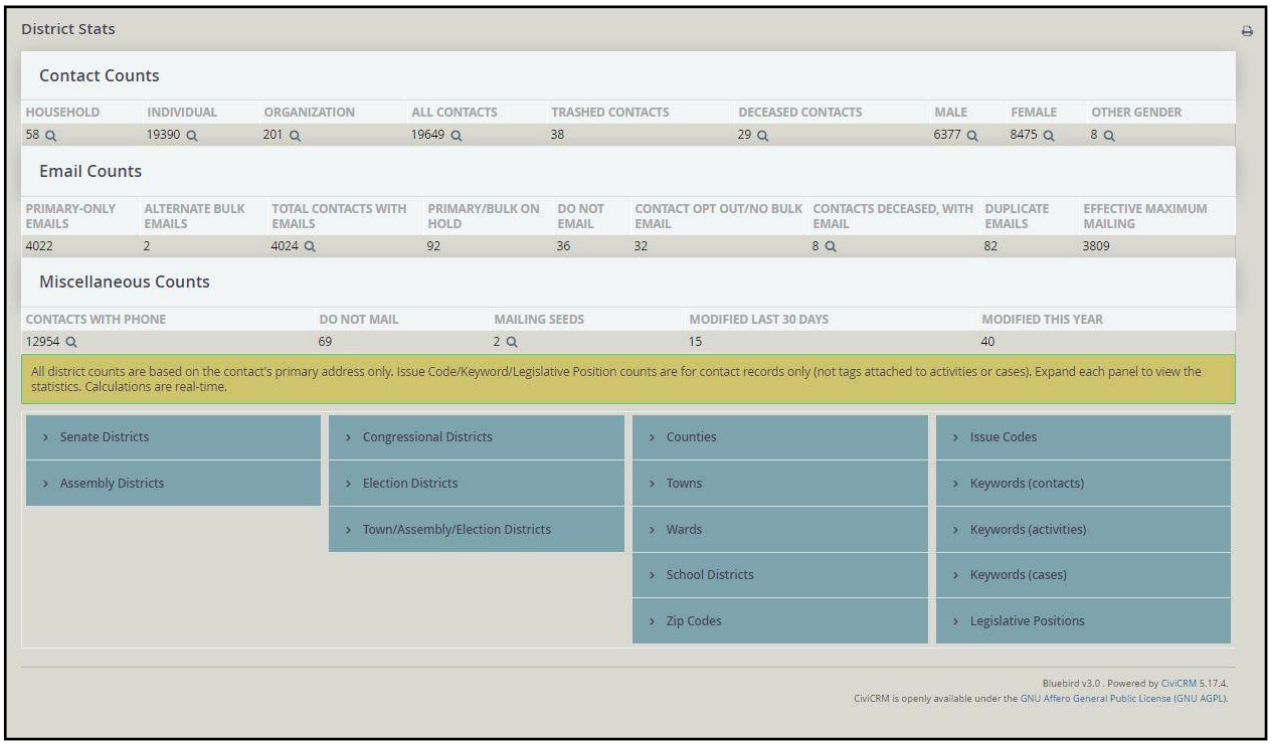
This unsubscribe page displays the mailing categories and the standard opt-out of all mailings option. (By default, the mailing categories are always selected.) If the recipient

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

This view provides statistics for fields within Bluebird, viewing this information is 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.
3. Click on the **magnifying glass** next to the stat to conduct an Advanced Search, this will then let you create a Group or Tag these records.



Search Menu

Advanced Search

General Information

Used to search for virtually any information available in the database.

- Click **Search,** from the main navigation menu, and then **Advanced Search** to open the search interface, 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 fields let you set multiple criteria by using a comma separator.

- 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 Activities or Cases.

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

Search Operator field

Allows you to be more or less restrictive with your search results.

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

By selecting **AND** under Search Operator**, Aging** under Issue Code(s), and typing **11720** in the Zip Code field the result will show all contacts with the Issue Code Aging who live in Zip Code 11720.

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

By selecting **OR** under Search Operator, **Aging** under Issue Code(s), and typing **11720** 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 11720 even if they do not have the Issue Code Aging.

Conducting an Advanced Search

1. Select the **Search** menu, and then 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.
    - **Contact icon**: shows basic details about the contact through a popup screen.

Note: When viewing a search result, you are seeing ALL names listed in alphabetical order. If you click a different letter from the Search result listing, you have just changed the filter of your search result. To view the entire list again, click on the All link.

Searching for Deleted Contact Records in Trash

You may search through the Trash to view contact records that have been deleted but not permanently removed from the system. The Office Administrator has the ability to permanently delete a contact record.

1. Select the **Search** menu, and then click **Advanced Search**.
2. Under the **Search Settings** panel click the check box titled **Search in Trash** (deleted contacts).
3. Click the Search button to display the search results list.
4. Under the actions drop down menu at the top of the screen you can restore contacts.

Note: Other fields can be included in a Trash search (i.e. last name).

Find Cases

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

- Cases by Constituent Name, Email, or Subject
- Case Start/End Dates
- Case Type
- Status
- Case Tags
- Case ID

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 Text
- Activity Status
- Activity Tags
- Location
- Website Survey
- Priority
- Follow-up

Find Anything

You can search for records containing a word or phrase in any text field - including name and email fields, notes, activity subject and descriptions, as well as any searchable custom text and note fields. Narrow your search by selecting a specific table / type of record. Wildcards are automatically added to your search term. Searches are NOT case-sensitive.

EXAMPLE: You can enter *fiesta*, and get a match on a contact with a note containing *Fall Fiesta.*

Search and Sorting

- Select the **Search** menu, and then click **Find Anything Search.** Type desired text into the Find * box and select a table option from drop down list.
- To view the attachment, click on the paperclip icon and the attachment will download onto your computer.

Search Builder

This Search allows you to build your own searches based on fields and operators. You can save your searches once they are built.

Proximity Search

This search finds records residing in the same postal code.

1. Click **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

This 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. Follow the steps below to perform a Birthday Search.

1. Click **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

This search allows you to include or exclude certain groups from your results. A common reason for this search is if you want to do a district wide constituent postal mailing but would like to exclude members of the press. If you have previously labeled these contact 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 by performing the following steps:

1. Click **Search** menu, then click **Include/Exclude Groups/Tag**.
2. From the Include/Exclude fields, select the **desired Group/Tag to Include and Exclude**.
3. Select and/or search option.
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 and/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 tag(s) were added. You can search for contact, activity and case tags.

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.

Tag Demographic Search

This search allows you to group Tags and Demographics together to get a count in your database.

For example, I want to see how many people in each postal code in my database are interested in the Issue Code of Aging. I can conduct this search by selecting Aging as my Tag and then Postal Code as my demographic; the results will give me a screen with all of my postal codes with a count of how many records are tagged with Aging.

This type of search is different from Advanced Search because it is only giving a count; you will not get a result of contact names with this search OR receive the actions menu to then do other things to this list (i.e. Tag all results).

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 constituents in Albany County, you could save that search for future use and title it Albany County Smart Group. If another staff person enters a new contact that lives in Albany County, they would appear in the Albany County Smart Group results the next time it is run because they meet the criteria.

Working with Static Groups

Creating a Static Group from the Create Menu

1. From the main navigation area, click the **Create** menu, and then click **New Group**.
2. Type a **name for** the group in the Group Title box.
3. If desired, type a **description**. *Note: a group's description only shows up on the Manage Group screen.*
4. If desired, choose a **Parent Group**.
5. If you know you will be using this group for a Mass Email within Bluebird, check the **Email List** or **Test Email List** options in the Group Type section.
6. Click **Save**.

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,** and 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 you know you will be using this group for a Mass Email within Bluebird, check the **Email List** or **Test Email List** options in the Group Type section.
8. 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** button and type in the filter box the name of the **desired group**. Click **the group** and then 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 **records** and then click **Actions**.
3. Click **Group – Add Contacts**.
4. Make sure the radio button is selected next to **Add Contacts to Existing Group**.
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 **the three dot menu**, across from the Group that you would like to edit.
3. When you click on **the three dot menu**, 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. In the Current Groups listing click **Remove** across from the Group you want to remove.

Adding Staff Members to the Office Staff Group

In order to use the *Assign To field* within Activities and Cases, you first need to have your office staff listed in the Office Staff Group. Complete the steps below.

To add one person at a time:

1. Search the database to find the **Office staff user record** you want to add to this group.
2. From the Office staff user's record view screen, click on the **Groups tab**.
3. Click **Add to a group** and select **Office Staff** from the list.
4. Click **Add.** This contact is now added into this Group.

To bulk add:

1. Click in the **Quick Search** box and select the radio button next to Email.
2. Type **%@nysenate.gov** and then press **Enter** on your keyboard.
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** and click **Group - Add Contacts**.
5. In the select group drop down menu, choose **Office Staff**.
6. Click **Add to Group**.
7. A message popup box 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

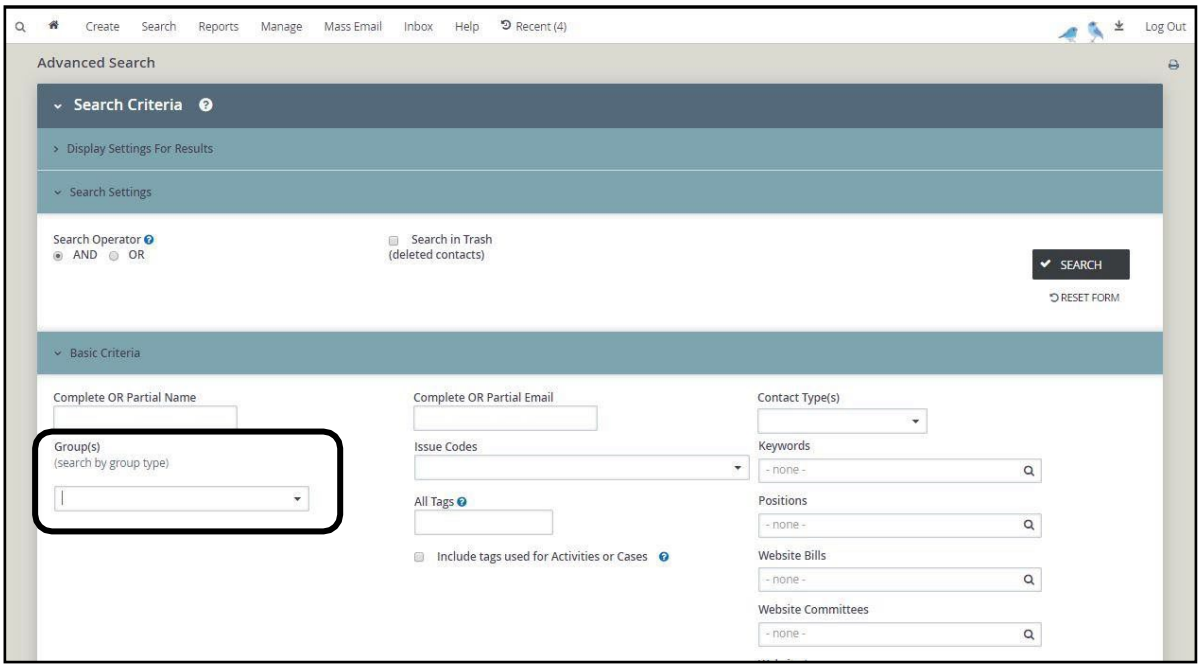
1. Search the database to find the **desired common** records.

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. After selecting the desired records, click **Actions** and then click **Group – Create new smart group.**
4. Type a **name** for the Smart Group. If desired, enter in a description.
5. If you know you will be using this group for a Mass Email within Bluebird, check the **Email List** or **Test Email List** options in the Group Type section.
6. Click **Save Smart Group**.
7. 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 **Search**, then click **Advanced Search**.
2. Under the Basic Criteria section, click the **dropdown arrow** under Groups.



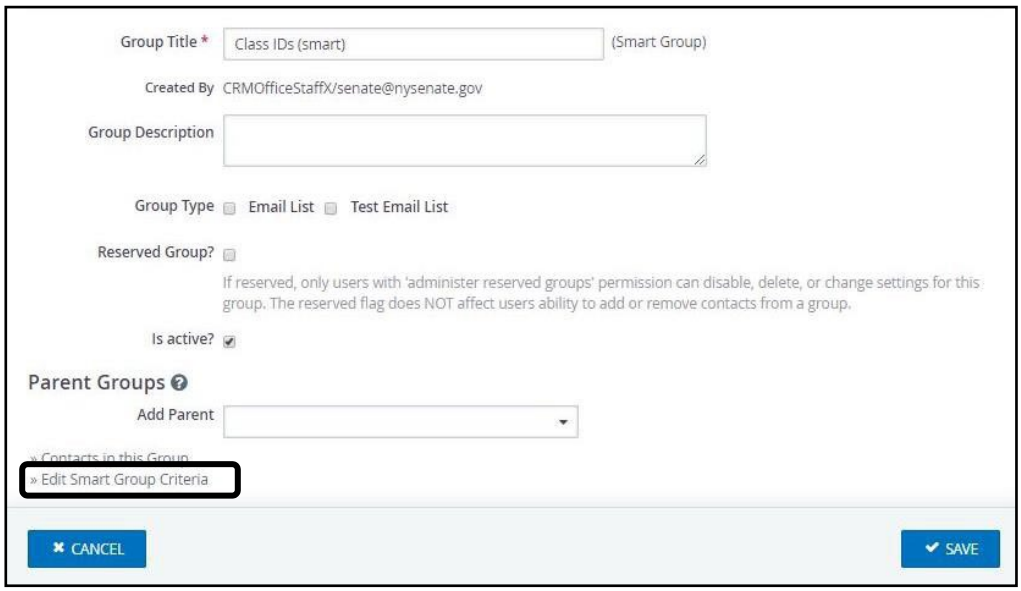
3. Click the **desired Group**.
4. Click **Search** to display a list of names.

Editing a Smart Group Name, Description or Email List status

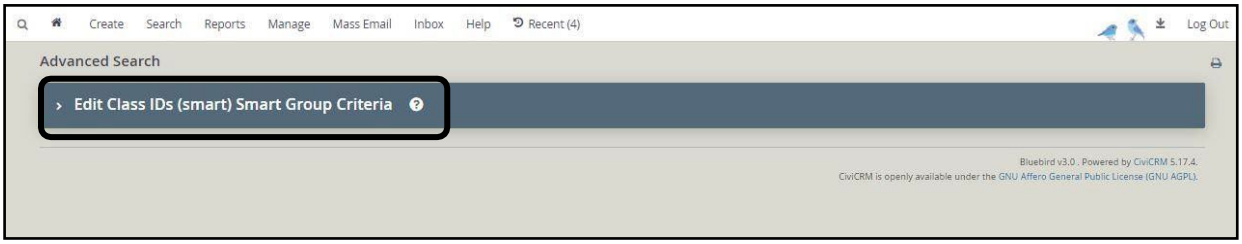
1. From the main navigation area, click **Manage**, and then click **Manage Groups**.
2. Click on the **three dot menu**, across from the Group that you would like to edit.
3. When you click on the **three dot menu**, a menu will appear that gives you three options: **Settings**, **Disable**, or **Delete**; 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 a Smart Group Criteria

1. From the main navigation area, click on the **Manage menu**, and then click **Manage Groups**.
2. Click on the **three dot menu** link, across from the Group that you would like to edit.
3. When you click on the **three dot menu** 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

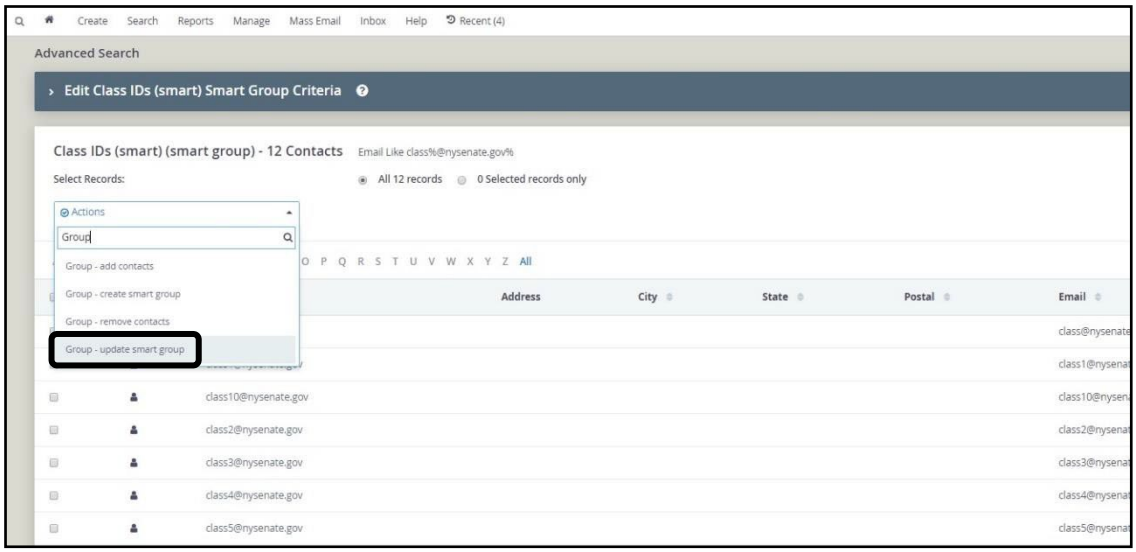


5. On the next screen click on the expandable panel titled **Edit [Group Name] Smart Group Criteria** at the top of the screen. This will open the Advanced Search panel.

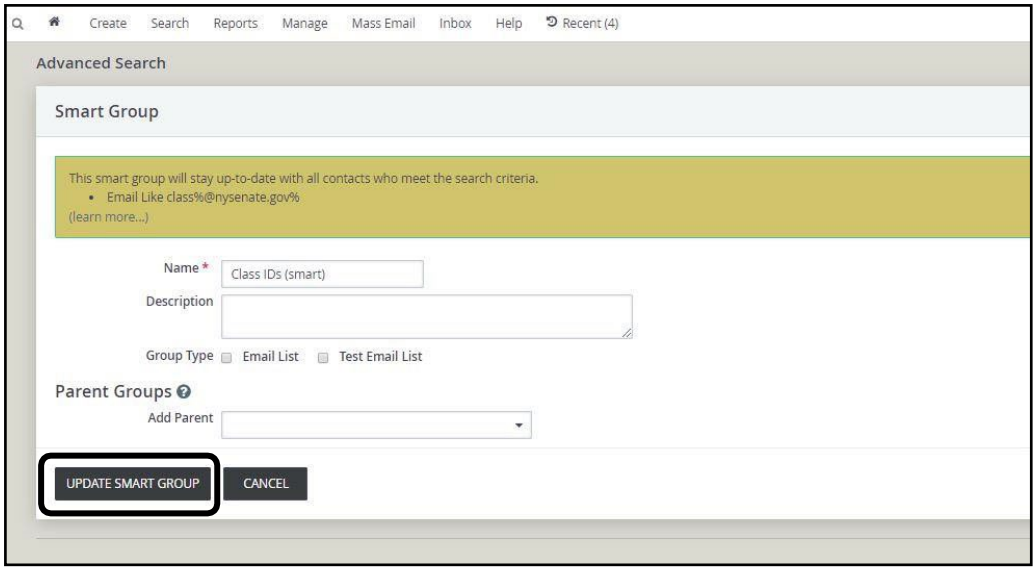


6. Make adjustments needed to the Advanced Search criteria and then click **Search**.

7. The screen will refresh with an updated view of the Advanced Search results page, select the radio button for All # records, select **Update Smart Group** from the dropdown Actions menu, click on Go.



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

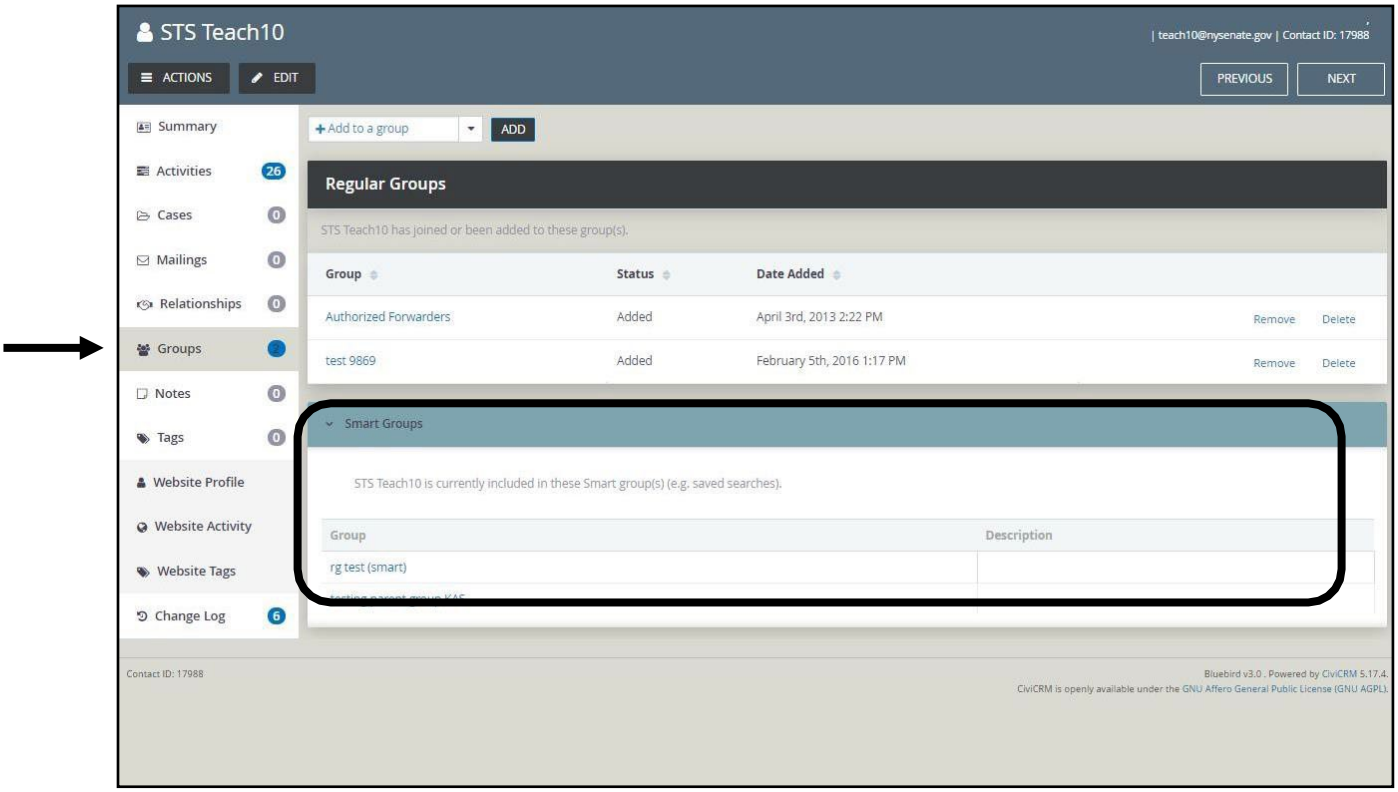


8. You will see the button change to Processing, then a message popup box will tell you the Smart Group has been saved. On the next page, click Done.

Note: This will bring you back to the Edit Advanced Search criteria page. You can click the Home icon 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.



Mass Email Template Categories

By default, each Bluebird database has the same set of template categories that match up with the mailing category options. You can create custom categories that can be used to organize these templates.

Once you have Mailing Template Categories created, you can filter your Mailing Templates screen to see just the ones that are assigned that Category.

To add custom mailing categories:

1. Select the **Mailing Template Categories** option off the Mass Email menu
2. Click **Add Mailing Template Category** at the top of the screen
3. Fill out the following fields:

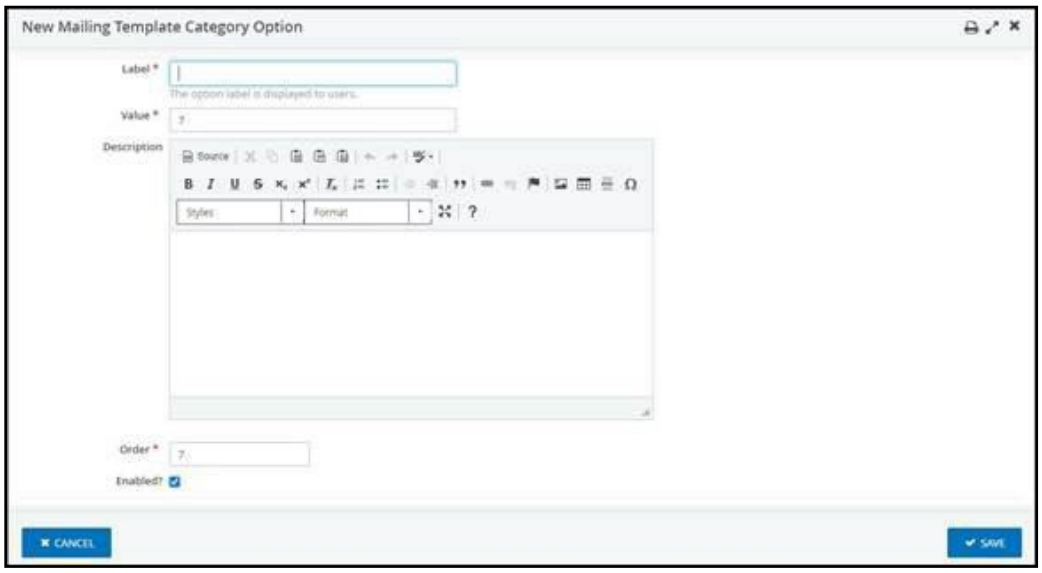
   Label: Name your Category

   Value: Add numeric value (where you want it to show in the list)

   Description: Type something about the category (optional)

   Order: Type a numeric value (same as value)

   Enabled: enable or disable to control list size



4. Click **Save** when finished

Note: You must have mass email roles to create mailing template categories.

Mailing Templates

Bluebird allows you to create mass email templates so you can reuse a mailing style that you like or use often (i.e. weekly). By creating a template, you have most of the layout work done for you before you even start an email, once you select a saved template, all you have to do is add your content and you are done. This helps save some time from having to build your email from scratch each time you want to send out an email.

Create a mailing template

1. Click on **Mailing Templates** off the Mass Email menu
2. Click on **New Template**
3. Give your Template a **Title** and assign it a **Category** (this can also be edited later if the category is not created yet) then click **Create Template**
4. Drag and drop your preferred blocks you want in your template, utilizing the **Content** and **Style** tabs you can set predetermined colors or fonts if you want
5. Once the layout is setup for your template click **Save** in the upper right corner

Edit a mailing template

1. Click on **Mailing Templates** off the Mass Email menu
2. Click **edit** across from the template you need to update
3. Make changes to the layout as needed and click **Save** in top right corner

Rename a template

1. Click on **Mailing Templates** off the Mass Email menu
2. Hover over the **Title column** until you see a pencil appear, click on the **pencil**
3. Make your **edits** and click on the **green checkmark** to Save

Edit a mailing template category

1. Click on **Mailing Templates** off the Mass Email menu
2. Hover over the **Category column** until you see a pencil, click on the **pencil**
3. Select your **category** from the drop down menu that appears
4. Then click on the **green checkmark** to Save

Copy a template

1. Click on **Mailing Templates** off the Mass Email menu
2. Click on **Copy** across from the template you would like to copy
3. Make any adjustments you need to make to the template then click **Save** in upper right corner

Note: If you want to rename the template you may, if you do nothing you will see two templates with the same name but one will say (copy) after it.

Delete a template

1. Click on **Mailing Templates** off of the Mass Email menu
2. Click **Delete** next to the template you want to remove
3. Click **Delete** at the verification prompt
4. The page will refresh and your template should no longer be listed

Filter

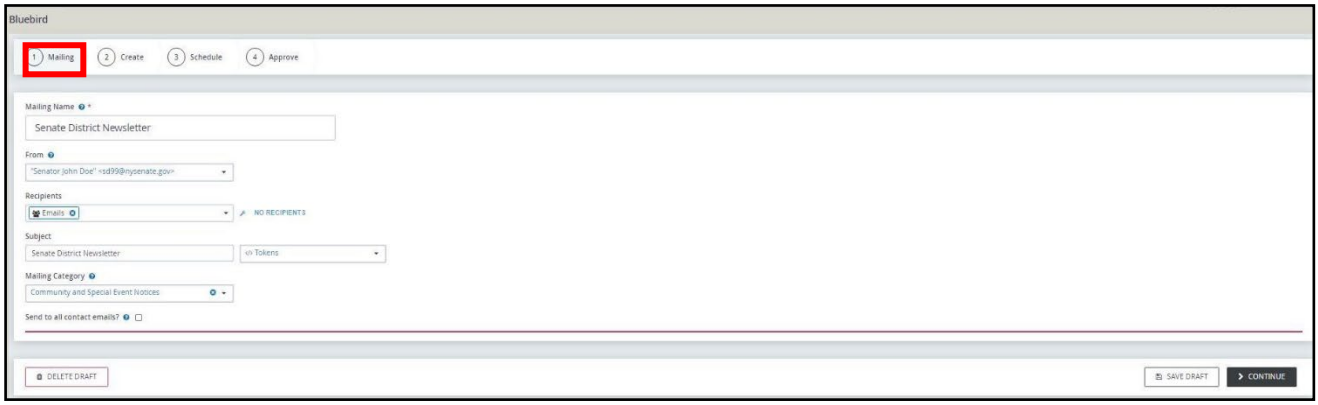
You can filter the Mass Email Templates screen by search by Title or selecting a Category from the drop down menu from the top of the page. You may be able to find a template you are looking for easier if you use the filtering options at the top of the screen.

Creating a Message – Mailing Tab

If you have the **Creator** role 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.

Once you have the correct roles you will see the **New Mass Email** option in the Mass Email menu. Click on this to start creating a new mass email.

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



- **Mailing Name:** this unique name will only be seen in Bluebird and will not be seen by the recipient of the email. THIS IS A REQUIRED FIELD.

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

- **Recipients:** selects 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.

- **Subject:** what recipients will see in the Subject Line of their email inbox.

Editing the dedupe by email option

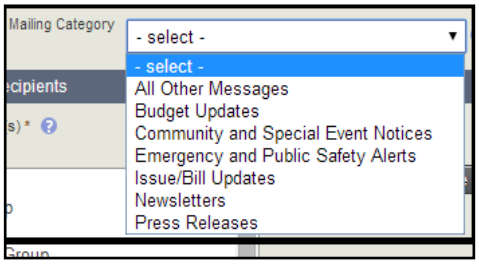
Click on the wrench icon, located to the right of the recipients count.Multiple people -- such as spouses, parents, or children -- may sometimes share the same email address.

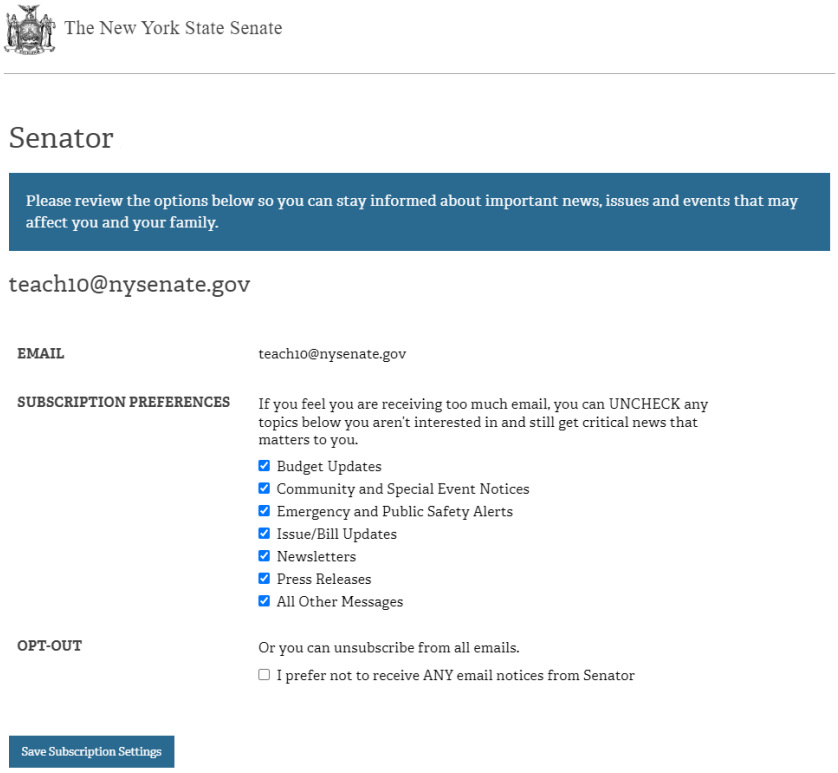
- To send only one message to the shared address, enable this option (make a check mark in the box). Mail-merge tokens will be filled for only one person.

- To send separate messages for each person, disable this option (remove the check mark in this box). Mail-merge tokens will be filled separately for each person.

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.





Send To All Contact Emails Option

By default, Bluebird will send to the contact's primary email address and any additional email addresses explicitly marked for bulk mail.

Selecting this option will send your email to all addresses present for a given contact, regardless of whether it is a primary email or marked for bulk mail sending.

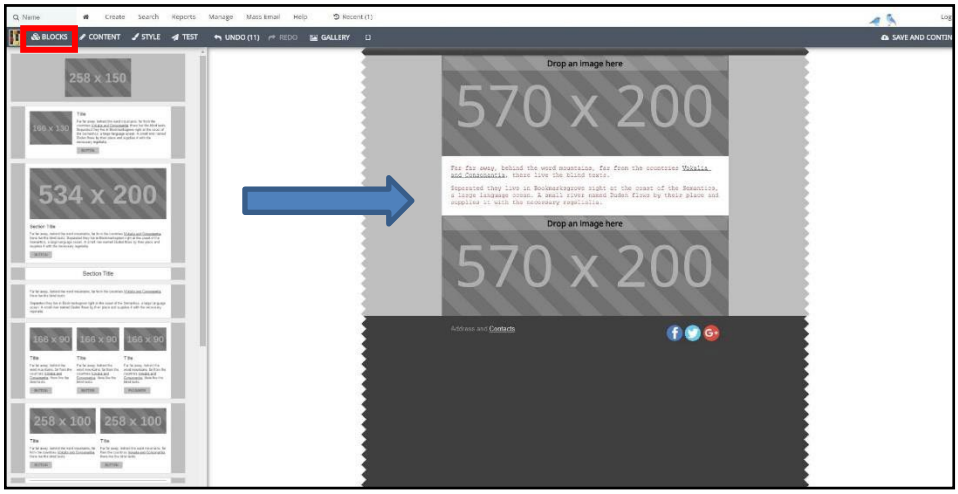
Creating a Message – Create Tab

The next tab in the creation of a mass email message is the Create Tab. Within this tab you will first be asked to select a template: blank template (allows you to build an email from scratch), Standard Office Template (includes the Header and Footer blocks), or a saved Template the office has created.

Once you create the template, it will bring you into the Content screen where you can then build the message of the mass email, you want to send out. The next few sections will break that content screen down.

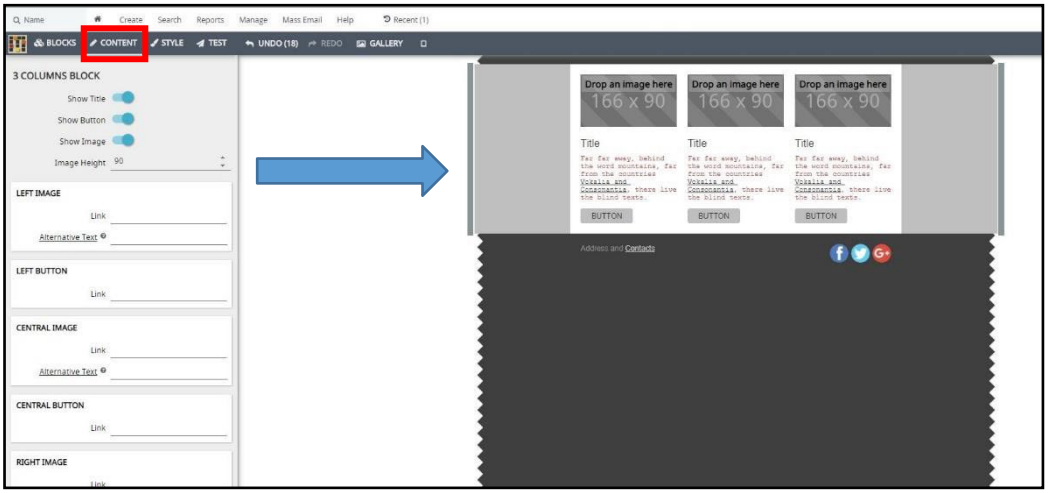
Blocks Tab

Using the column on the left, click the **block** you would like to use and drag over to the email on the right side of the screen to drop. You can release the mouse once you see the red lines appear. You can stack as many blocks as you want to build your mailing.



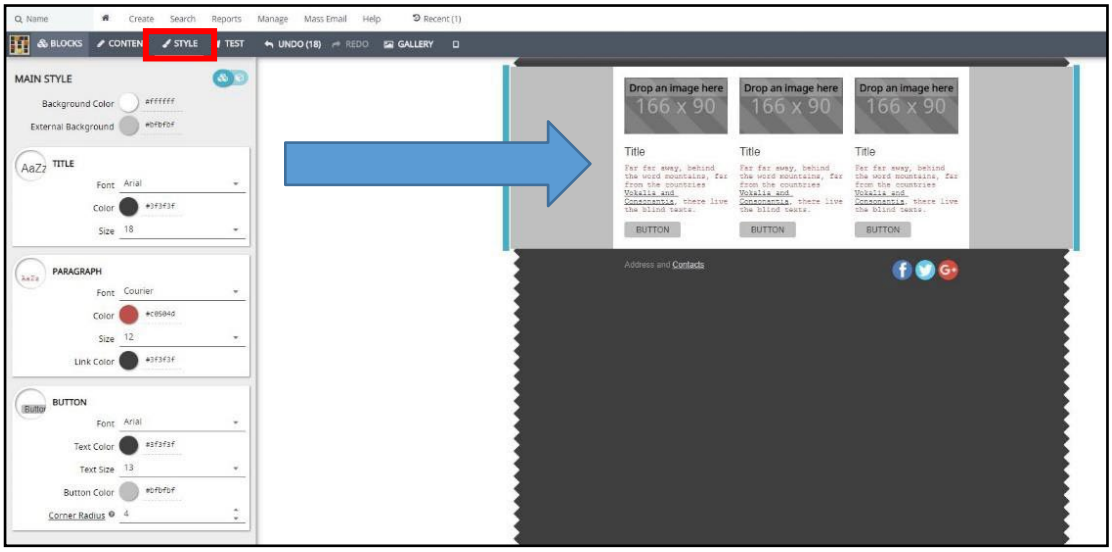
Content Tab

The content tab allows you to make edits to blocks that allow edits. Some blocks do not have a field that allows edits to the content, like for example the all text block.



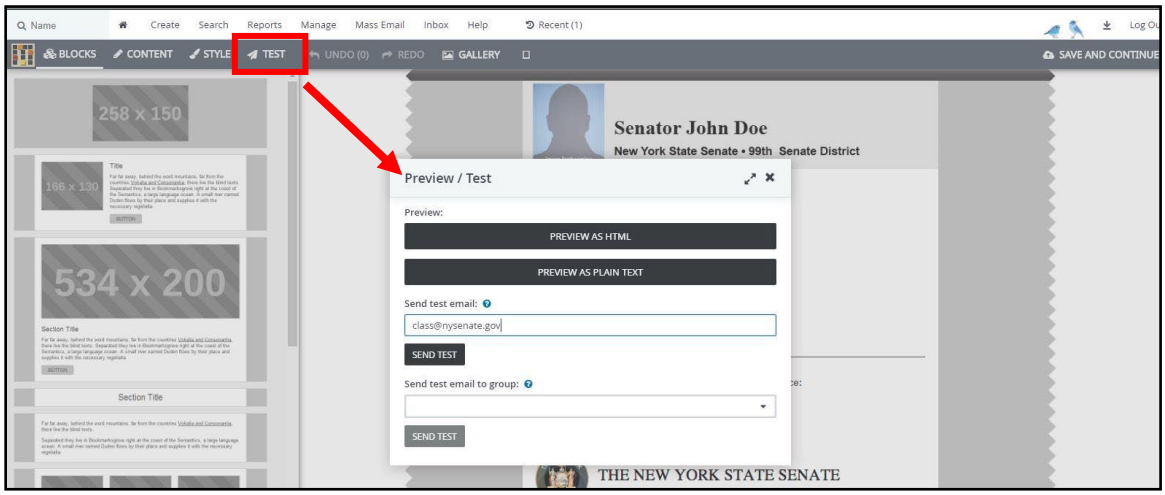
Style Tab

The style tab allows you to choose Font, Color, and Size for all Titles, Paragraphs, and Buttons that you have in your content blocks.



Test (popup box)

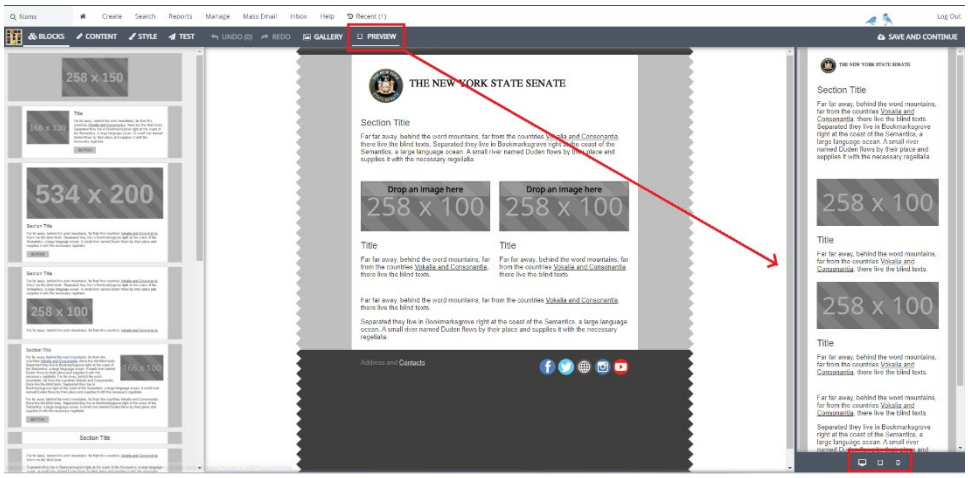
This is where you can test your email out BEFORE sending it to the public. This popup allows you to preview the HTML version of the email and send a test to yourself or your co-workers. You can also setup a Test Email Group that allows you to send to a specific set of people.



Live Preview Icon

This icon allows you to see a live preview of your email while you are building the content. This allows you to see layout and format features without having to get out of the current screen.

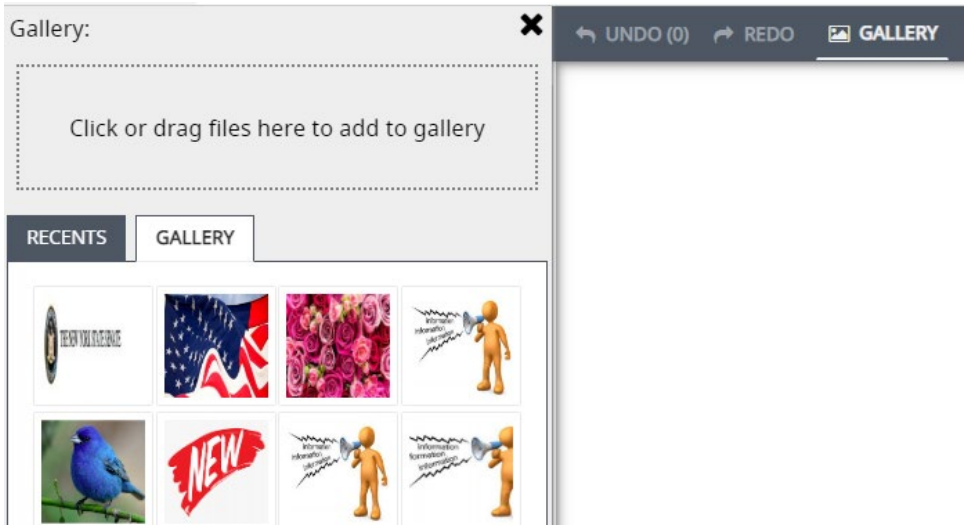
There is also an option that allows you to preview on different devices, choose the device you want to see: computer, tablet, or phone. This is located at the bottom of the live preview box.



Gallery

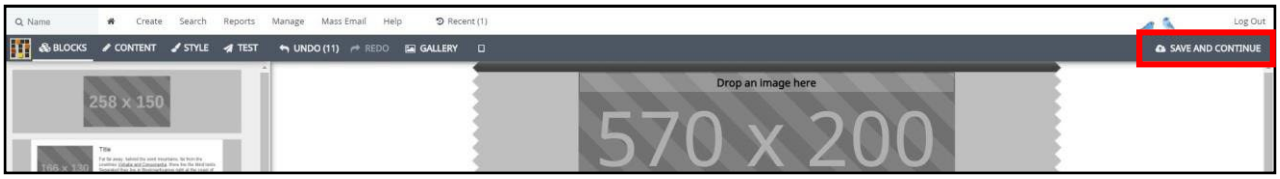
This tab will show you all of your images you have available for your mass emails.

If you need to upload an image, you can do this from within an Image block by clicking on the up arrow in the bottom left corner of the block.



Save and continue

Anytime you are done with building your content of your email, whether you are ready to continue the process or if you have to go back to it later, you will ALWAYS click on Save and continue to get out of this screen. This is important to save your work and is necessary if you want to continue to the next step.



After clicking on **Save and Continue** the screen will bring you back to the **Create** tab and you will need to click on **Continue** to move to the Schedule step (third tab).

Scheduling a Message – Schedule Tab

If you have the Scheduler role, you are able to decide when a mass email will go out. There are two options within Bluebird for scheduling a mailing, either immediately or at a scheduled date and time.

Immediately will happen the next time the server checks the system, this can happen anywhere from within seconds of clicking Schedule to up to 15 minutes later, depending on where in the cycle the server is. The server checks the system every 15 minutes.

Picking a date and time is sometimes a good way to allow yourself a buffer in case there is a mistake with the mailing that needs to be edited.

How to Schedule a Message

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.**
4. On the Schedule tab, you can review the mailing and the recipients list. Once these are verified you have the option of sending the email out **immediately** or selecting a **date and time**.
5. Click on **Schedule Mailing** when this screen is complete.
6. If you are not ready to schedule the mailing yet, click on **Save Draft** and it will update and save the draft to be scheduled a t a later date.

Approving a Message – Approve Tab

If you have the Approver role, you are able to decide if the mailing should go out or not. Your options are simple, either Approve or Reject the mailing.

There is a box available if you would like to leave a note for the Creator of the email. You can drag the bottom right corner of this box to expand it if necessary.

How to Approve a Message

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

2. Click **Approve or 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:

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

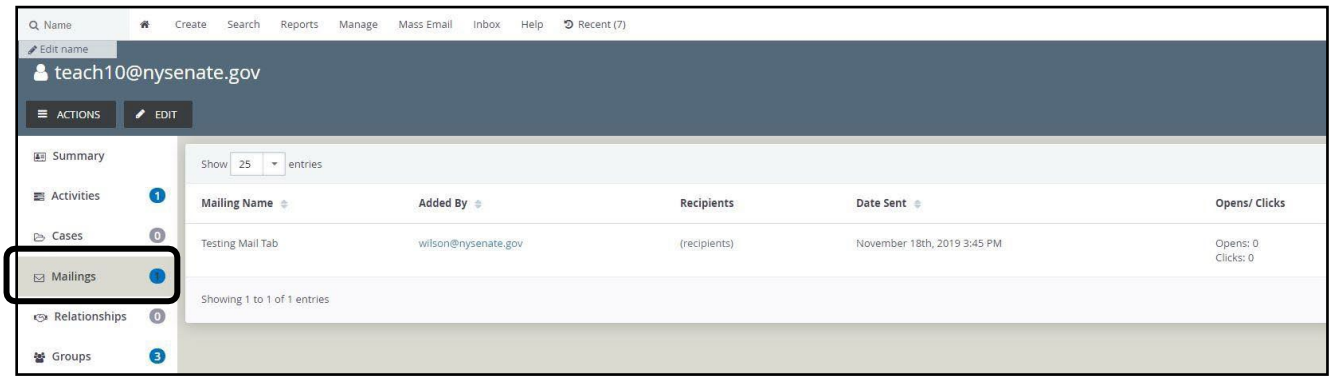
    b. **Rejecting Mailing**: If you choose this option, the mailing goes back into the Draft and Unscheduled Mailings. The Creator will get an email letting them know their message was rejected.

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.

Contact Record 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 the three dots under actions and select 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