User Manual
June 2015

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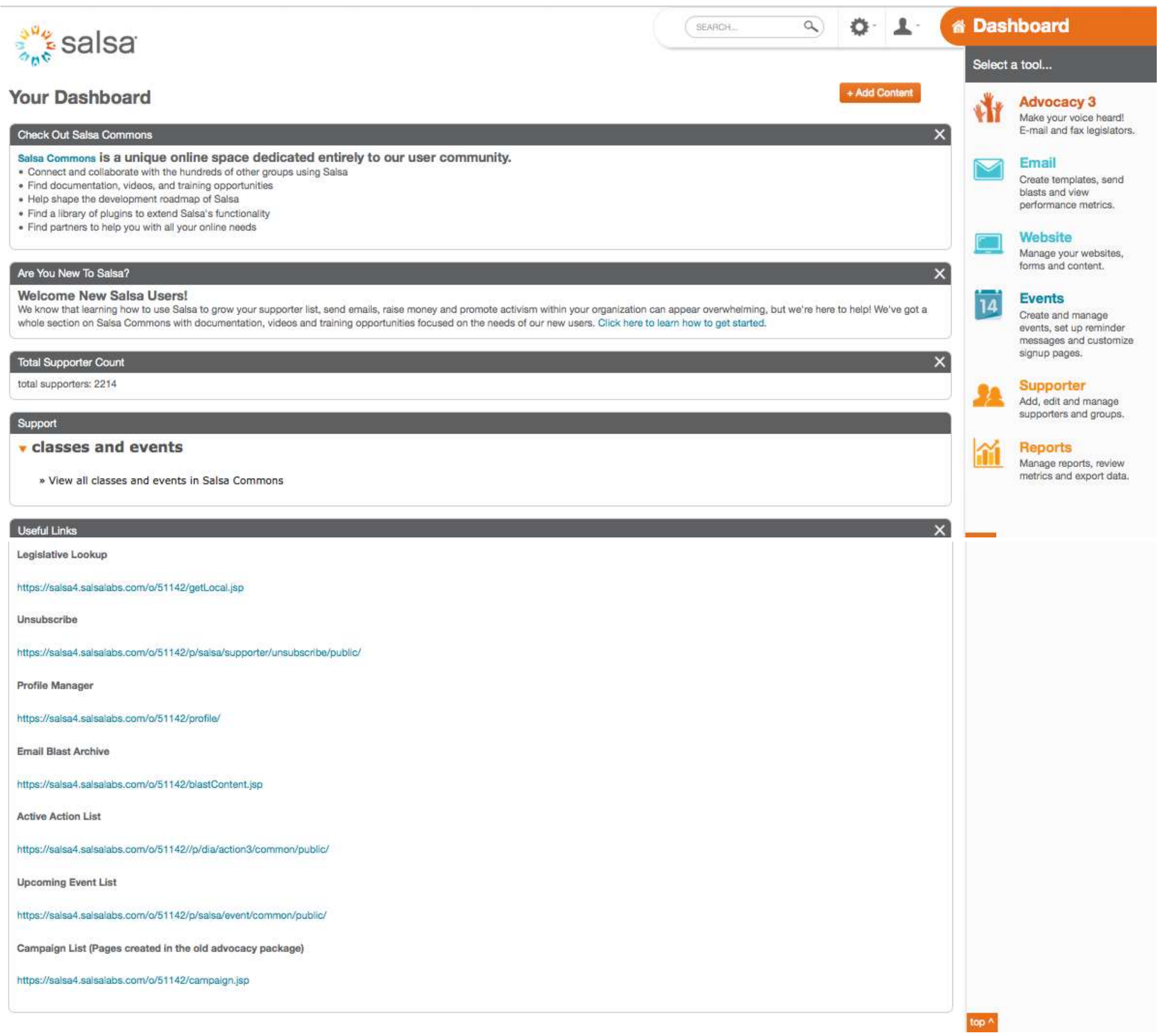
How To Login

1. Go to https://www.salsalabs.com/
2. In the upper right corner, put cursor over **CLIENT LOGIN.**
3. A drop down window will appear with three choices: Solis Login, Cosm Login, and Not Sure. Click on **Cosm Login.**
4. You will then be redirected to a page asking for username and password. Enter credentials.
5. Click **Login**.

Tab 1: Dashboard

1. Upon login, you will prompted with the following screen referred to as **Your Dashboard**:



Home Page

1. After successfully logging into the program with the new interface, you will be directed to **Your Dashboard,** or homepage, which is the main hub of the program.
    a. **Your Dashboard** contains six tabs on the left-hand section of the page. These tabs contain the different sections and features of the program. They are as follows:
        i. Advocacy 3
        ii. Email
        iii. Website
        iv. Events
        v. Supporter
        vi. Reports

Creating Stickies

Purpose: Stickies are a tool for adding notes to your dashboards. They can hold reminders to yourself, quick tips to remember, or other information you need handy when you're working. Stickies are also useful as an intra-organization communication tool; when you create a sticky note, it will be visible to any campaign manager who logs in to your organization's account. If you need to leave instructions for an intern who's using the system for the first time, or have an off-hours strategy note be available to your west coast web designer when you're not online, Stickies are your best bet.

Procedure:

1. Click the 

sign in the top right corner of **Your Dashboard.**
2. A gray box will appear with two subsections—**Reports** and **Stickies**.
3. Select the subsection labeled **Stickies.**
4. Next, click on **Edit and create stickies,** which is located directly below the main heading **Stickies.**
5. Your screen will be redirected to the stickies editing page. Stickies are fairly straightforward -- give them a title and some content, hit submit, and they'll appear as selectable items in the Dashboard Item Menu when you next go to one of your Dashboards.
    a. **Title** appears in the colored bar across the top of the Sticky
    b. **Content** is the body
    c. **Type** lets you select whether your Sticky will display HTML or not. Choosing HTML causes the Sticky to render its content in html, while choosing Normal forces the Sticky to display plaintext. Choosing Raw html will render the sticky in html but without the structure of the box. If you need to show a piece of web content to your designers that you think they should emulate, choose HTML and paste in the source code. If you want the source code itself to be available to them, choose Normal, paste in the content, and the source code will appear as non-rendered HTML.

d. **Editing** is a checkbox which allows you to specify whether or not the Sticky should be editable from the Dashboard. If the box is checked, you'll be able to change the content of the Sticky when it's on the Dashboard, and your changes will be reflected everywhere else that Sticky appears (after the screen is refreshed).

6. To remove a Sticky note from a Dashboard, simply click the white close icon in the top right corner of the note.
7. To delete a Sticky note completely, click the Stickies menu item in the Dashboard tab, and then click the 'Delete' link to the right of the Sticky in the list.
    a. Note that this removes the Sticky note permanently, and it is not retrievable.

Tags

Purpose: A tag is a user-applied keyword you can optionally assign to anything you create in Salsa to describe the item. Tags are easily searchable and can help you monitor a campaign by quickly seeing everything that's been done in Salsa around it. Additionally, tags are "sticky": any supporter that performs an action on a Salsa object with a tag will have their record tagged accordingly. In other words, someone who signs up on a page tagged with Supports Education will get his or her supporter record tagged with Supports Education. (Please note: the opposite is also true - if a tag is deleted from the Manage Tags screen, then that tag will also be removed from all supporter profiles, pages, etc.)

Procedure: You can create tags through many different ways:

Option 1:

1. Go to the Manage Tags screen
2. on the fly while in any Salsa workflow or supporter record page
3. while importing supporters, either from the imported file or through the importer tool itself
4. Using the Manage Tags screen
5. In Salsa 2.0: click on the "gear" icon on the top of the screen, then select Manage Tags:
6. In the Manage Tags screen, you can look at the details for any existing tag, copy or delete/remove tags, and add new tags by clicking the "Add Tag" button.
7. on the fly while in any Salsa workflow or supporter record page
8. You can apply a tag to anything you've created in Salsa--an individual supporter, an e-mail blast, a donation, an action--by entering the edit screen for that object and typing in a tag in the box in the upper right-hand corner:
9. In Salsa 2.0: click the blue Publishing tools box on any object, and it will bring up the tags interface:
        1. In the previous version of Salsa:Tags and the tag entry box are in the top right of almost every object in Salsa:
        2. The Tag box will recognize your text as you enter it, and load a menu of similar existing tags so you can easily pick an old tag and apply it without searching. If you enter text that does not match an existing

Tag and type Enter or press Add Tag then you'll create a new tag and apply it to the current object or supporter.

3. The following characters are allowed in tags: a-z, A-Z, 0-9, ! : ; % @ / . _ ( ) $? # + -. Spaces are OK.
4. Do not use , (the comma) in a tag name. Several tag-related features in Salsa treat the comma as a delimiter between different tags; a comma in the tag name itself may confuse queries or make other unexpected things occur.
5. Note that tags have two different naming fields: tag, the one you'll always use; and, prefix, which is simply an optional text field you can add to further explain or classify your tag. The Salsa tag entry box can set up a tag with prefixes simply by including a : in the tag. Using the Prefix field is purely optional.)
6. Enter xyz campaign, and you'll create (or re-apply, if it already exists) a tag called xyz campaign
7. Enter action:xyz campaign and you'll create (or re-apply) a tag called xyz campaign with a prefix called action
8. Prefixes have no special function apart from helping you explicate or classify your tags.

2. Your Information
2. These sections are:
   1) salsa common
      i. Salsa Commons is a unique online space dedicated entirely to our user community.
      ii. Connect and collaborate with the hundreds of other groups using Salsa
      iii. Find documentation, videos, and training opportunities
      iv. Help shape the development roadmap of Salsa
      v. Find a library of plugins to extend Salsa's functionality
      vi. Find partners to help you with all your online needs
   2) Support
   3) New Users
      i. Helps new users by directing them towards tutorials
   4) Total Supporter Count
   5) Website features
      i. Here you can create pages to inform, engage, recruit and interact. These pages can serve as redirections or support pages for advocacy or donations actions, or they can be major campaigns in their own right
      ii. Create Sign-Up pages and other interactive custom forms;
      iii. Create e-Postcards and tell-a-friend pages;
      iv. Manage images and documents;
      v. Create Surveys and Questionnaires;
      vi. Create custom Thank-You pages to link from action pages.

Tab 2: Advocacy 3

<u>CREATE AN ACTION ALERT</u>

<u>Purpose</u>: To create an **Action Alert.** An action alert is a message sent to a list of people requesting their support on a particular policy issue.

<u>Procedure</u>:

1. On the dashboard/homepage, select **Advocacy 3.**
2. A series of options will then appear on the right side of the screen.
3. Under Online Actions and Petitions, click on **Create an Action or Petition.**
4. Select the type of action.

<u>BARE BONES UI</u>

<u>Purpose</u>: To create a **Bare Bones UI**. According to SALSA, a Bare Bones UI is "a targeted action without dynamic elements, for slow connections. Starts with the supporter form, followed by the content and targets."

<u>Procedure</u>:

1. On the dashboard/homepage, select **Advocacy 3.**
2. A series of options will then appear on the right side of the screen.
3. Under Online Actions and Petitions, click on **Create an Action or Petition.**
4. Select **Bare Bones UI.**
5. Then Click on **Create New Action**.
6. You will then be redirected to the **Description** tab.
    a. In the first box entitled **Reference Name**, type the name you wish to call your Bare Bones UI. This name provides an internal reference point for the action. It is not visible nor will it become visible to the public.
    b. In the second box entitled **Action Title**, type the title of your action. This title will appear to the public.
    c. In the third box entitled **Brief Description**, provide a brief summary of what the action is about.
    d. In the fourth box entitled **Footer**, insert (if desired) a message that will appear after the signature form.
7. You will then be redirected to the **Content** tab.
    a. Briefly scroll down until you reach the editable boxes entitled **Recommended Letter Subject** and **Recommend Letter Content.**
    b. Under **Recommended Letter Subject**, insert the subject of the letter. Be specific.
    c. If you do not want to give the public the opportunity to edit subject of the letter, click on the box to the left of **Make this subject uneditable.**
    d. Under **Recommended Letter Content**, insert the body of the letter to be sent to legislators. Be brief.
    e. If you do not want to give the public the opportunity to edit the content of the letter, click on the box below **Make this content uneditable**.
    f. Click on **Save** to save content changes.
    g. Click on **continue to next step** to proceed.

8. You will then be redirected to the **Targets** tab.
    a. This section allows you to determine who the action will target. Click on the drop down menu under Add a set of targets to select a target type.
    b. After selecting the target type, click **Add Target.**
    c. The target type will appear under the **Type** column. The method of transmitting the action will appear under the **Method** column. In this case Email/Webform is our method. Other available methods include blind hole, fax, and blind failover.
        i. Black Hole: silently send no messages.
        ii. Fax: Send a fax, at $0.10 per fax.
        iii. Blind Failover: Use Email/Webform unless the webform would require more user interaction; use a Fax if the fax limit has not been reached; otherwise, silently send no messages.
    d. The content type will appear under the **Content** column. In the drop down menu, you can choose which content type to include in the action.
9. You will then be redirected to the **Who can act?** tab.
    a. Select from the drop down menu who is allowed to take action. Options include **Everyone** and **Only people in the following areas**.
        i. If everyone is allowed to take action, select **Everyone.** Then click on **save & continue.**
        ii. If only certain people are allowed to take action based on geographic criteria, select **Only people in the following areas** from the drop down menu.
            1) A set of boxes will then appear with the following options: **Restrict to these States**, **Restrict to these Federal Districts**, **Text for Excluded Users**.
            2) Under **Restrict to these States**, select the state(s) in which participants will be allowed to take action.
            3) Under **Restrict to these Federal Districts**, select the district(s) in which participants will be allowed to take action. <u>Note</u>: To select multiple states and/or districts on a PC, hold down the control key while clicking on respective states. To select multiple states and/or districts on a Mac, hold down the command key while clicking on respective states.
            4) Under **Text for Excluded Users**, include a message that will appear to participants who do not meet the geographic criteria of the action.
10. You will then be redirected to the **User information** tab. This tab allows you to gather information about the action's participants
    a. To add additional fields, click on 

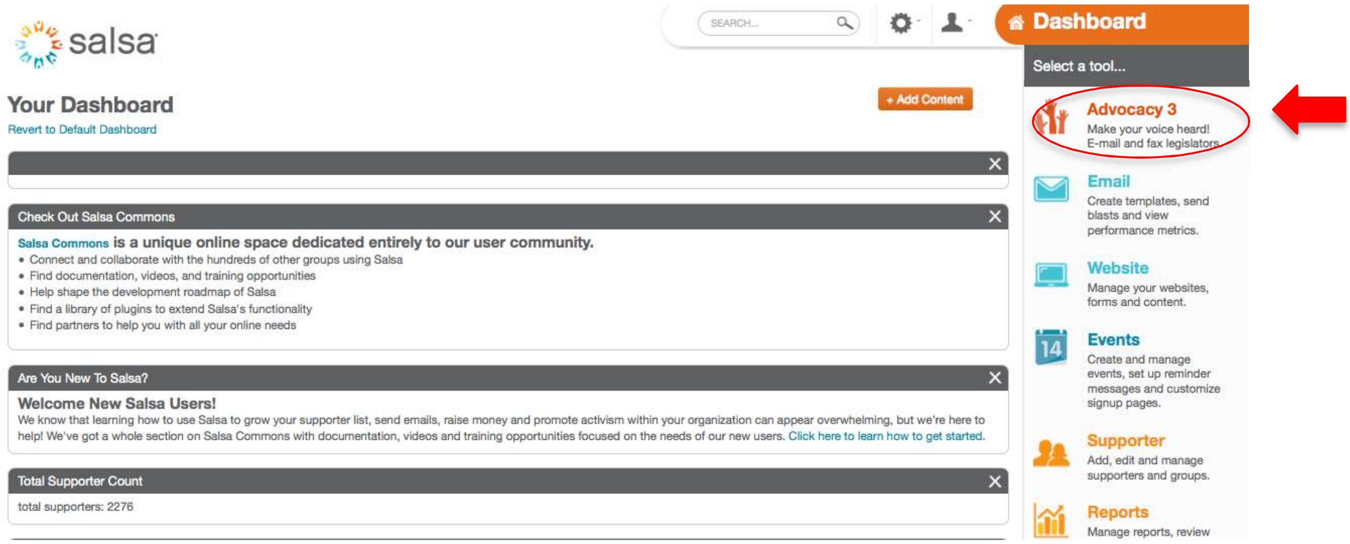
, and choose which field to add from the drop down menu.
    b. If the field is required, click on the box so the check mark appears. If the field is not required, leave the box blank if the box is already blank. If the box is not already blank, click on the check mark to remove the checkmark, making the box blank.
    c. To remove a field, click on the encircled negative sign . The field will then disappear.

i. To automatically add participants to a group after they have submitted their information, click on + Add a group
ii. A sub window will appear asking for credentials
iii. Enter credentials if known, then press **Search** to locate the group.
iv. Another avenue is to click Select next to the **Group_Name** of choice. That group will then be added.

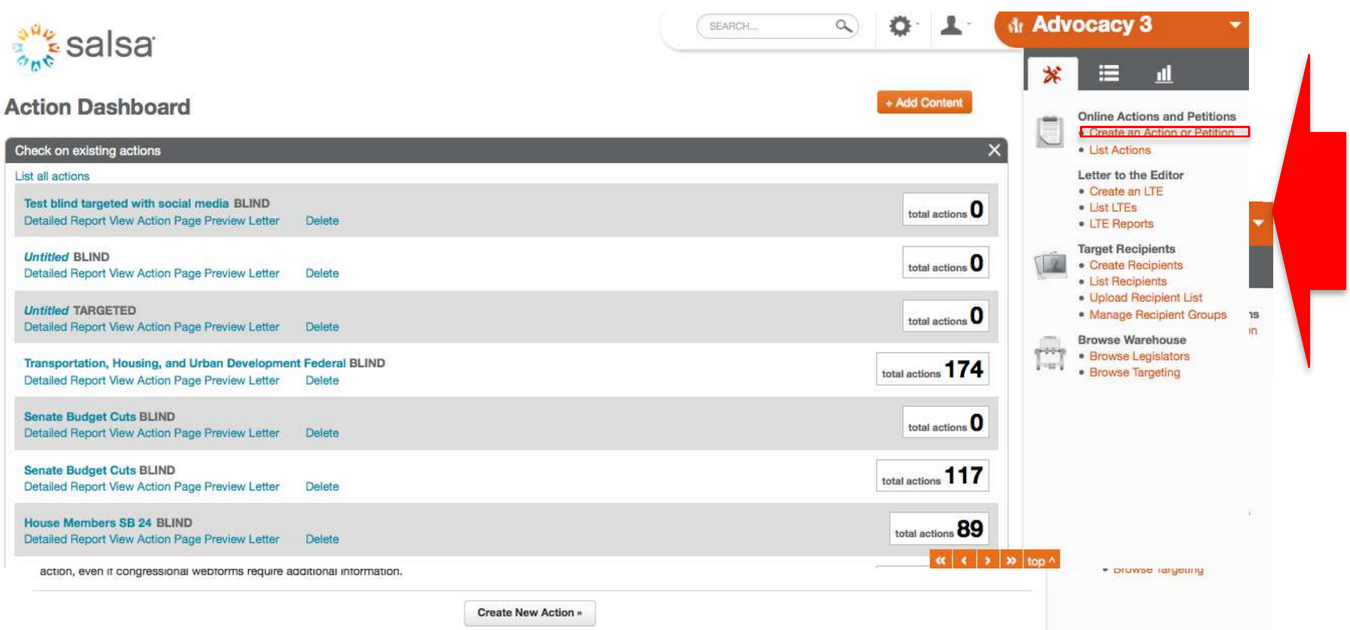
d. Press save & continue to proceed.

11. You will then be redirected to the **Follow-up** tab. This tab deals with the message that appears after a participant has submitted the action.
    a. Select the message you want to display after successful participation in the action by clicking in the box under **What do you want to display on success?** and choosing from the options that appear.
    b. The following box entitled **Thank You Text** provides space to insert a crafted message of gratitude that will appear after successful actions.
    c. To add an automated email response after participants have successfully taken part in the action, click on + Add an existing response.
        i. Enter credentials if known then press Search to locate group OR scroll down and click on Select next to the **Reference_Name** of choice. That follow-up will then be added.
    d. Press save & continue to proceed.
12. You will then be redirected to the **Options** tab.
    a. To limit the number of emails participants send to legislators, click on the drop down box labeled **Unlimited Emails.** The following screen will appear. Select which option best suits your action's purpose: Unlimited emails, Send No Emails or Webforms, Specify Email Limits.
    b. Regarding faxes, select from the drop down menu labeled **Send No Faxes** the fax procedure that best suits your action's purpose. Options include: Unlimited Faxes, Send No Faxes, Specify Fax Limit.
    Note: Each fax costs $0.10 per page.
    c. To update the status (active or inactive) of the action, click on the box under **Status** labeled **Active.**
    d. Select **Inactive** if you want to put the action on hold. This will send participants to a redirect setting.
    e. Click on save to save progress.

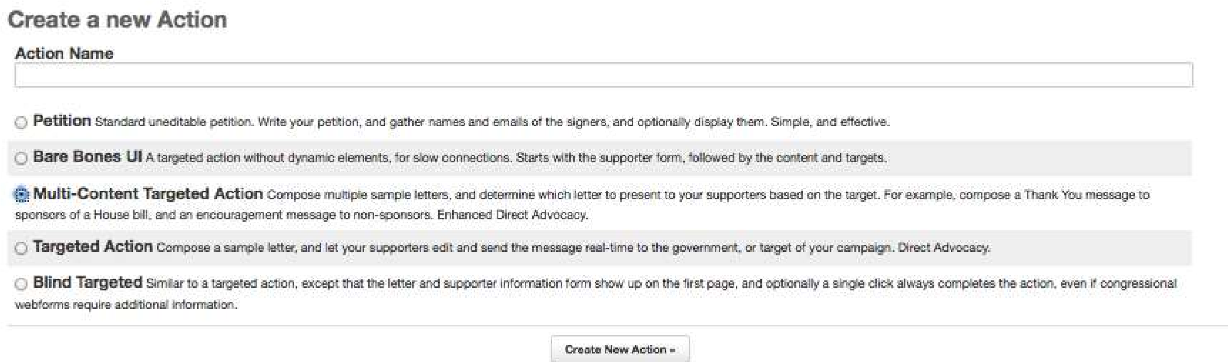
1.


salsa
SEARCH...
Dashboard
Select a tool...
Your Dashboard
Revert to Default Dashboard
+ Add Content
Check Out Salsa Commons
Salsa Commons is a unique online space dedicated entirely to our user community.
• Connect and collaborate with the hundreds of other groups using Salsa
• Find documentation, videos, and training opportunities
• Help shape the development roadmap of Salsa
• Find a library of plugins to extend Salsa's functionality
• Find partners to help you with all your online needs
Are You New To Salsa?
Welcome New Salsa Users!
We know that learning how to use Salsa to grow your supporter list, send emails, raise money and promote activism within your organization can appear overwhelming, but we're here to help! We've got a whole section on Salsa Commons with documentation, videos and training opportunities focused on the needs of our new users. Click here to learn how to get started.
Total Supporter Count
total supporters: 2276
Advocacy 3
Make your voice heard! E-mail and fax legislators
Email
Create templates, send blasts and view performance metrics.
Website
Manage your websites, forms and content.
Events
Create and manage events, set up reminder messages and customize signup pages.
Supporter
Add, edit and manage supporters and groups.
Reports
Manage reports, review

2. and 3.

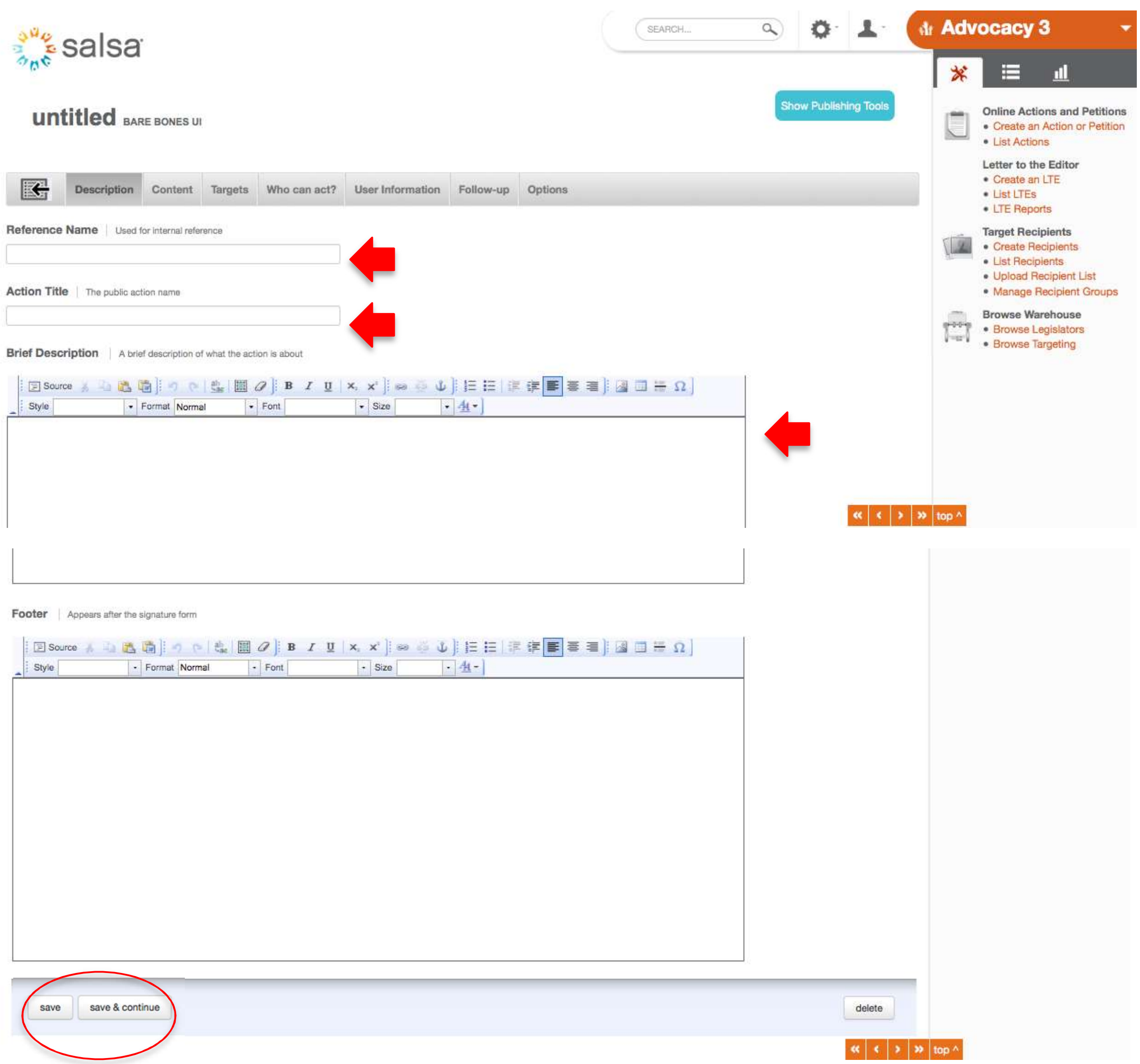

salsa
SEARCH...
Advocacy 3
Action Dashboard
+ Add Content
Check on existing actions
List all actions
Test blind targeted with social media BLIND
Detailed Report View Action Page Preview Letter Delete
total actions 0
Untitled BLIND
Detailed Report View Action Page Preview Letter Delete
total actions 0
Untitled TARGETED
Detailed Report View Action Page Preview Letter Delete
total actions 0
Transportation, Housing, and Urban Development Federal BLIND
Detailed Report View Action Page Preview Letter Delete
total actions 174
Senate Budget Cuts BLIND
Detailed Report View Action Page Preview Letter Delete
total actions 0
Senate Budget Cuts BLIND
Detailed Report View Action Page Preview Letter Delete
total actions 117
House Members SB 24 BLIND
Detailed Report View Action Page Preview Letter Delete
total actions 89
Create New Action »
Online Actions and Petitions
• Create an Action or Petition
• List Actions
Letter to the Editor
• Create an LTE
• List LTEs
• LTE Reports
Target Recipients
• Create Recipients
• List Recipients
• Upload Recipient List
• Manage Recipient Groups
Browse Warehouse
• Browse Legislators
• Browse Targeting

4. and 5.



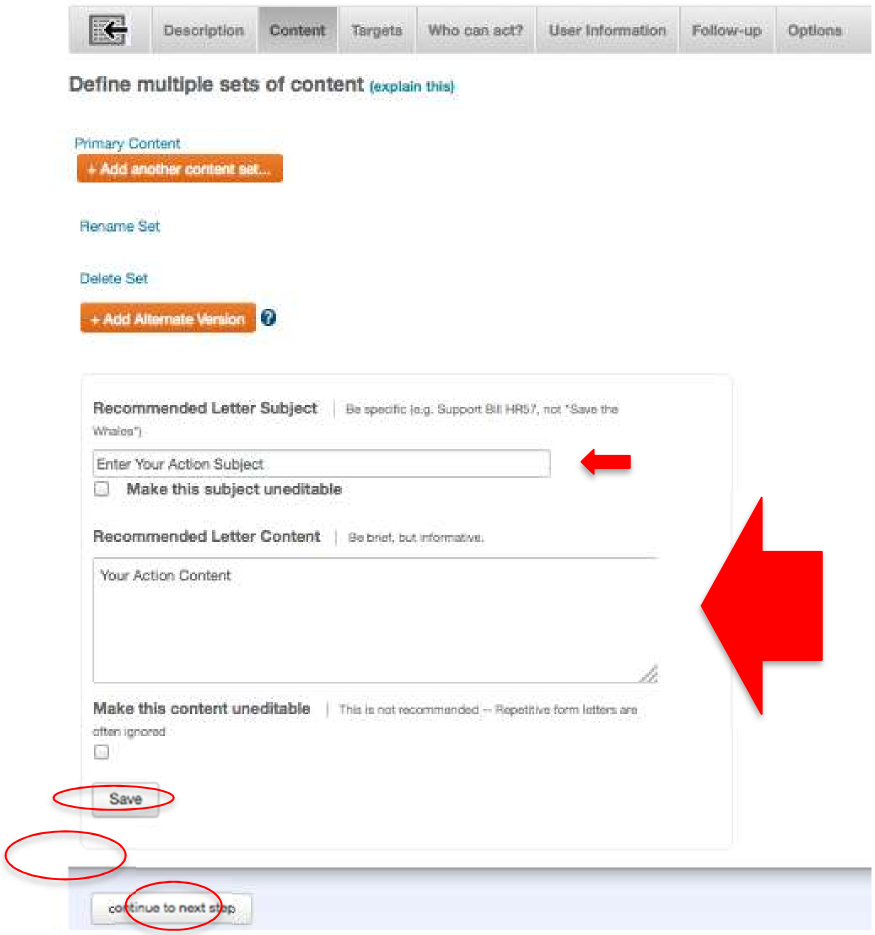
Create a new Action
Action Name
Petition Standard uneditable petition. Write your petition, and gather names and emails of the signers, and optionally display them. Simple, and effective.
Bare Bones UI A targeted action without dynamic elements, for slow connections. Starts with the supporter form, followed by the content and targets.
Multi-Content Targeted Action Compose multiple sample letters, and determine which letter to present to your supporters based on the target. For example, compose a Thank You message to sponsors of a House bill, and an encouragement message to non-sponsors. Enhanced Direct Advocacy.
Targeted Action Compose a sample letter, and let your supporters edit and send the message real-time to the government, or target of your campaign. Direct Advocacy.
Blind Targeted Similar to a targeted action, except that the letter and supporter information form show up on the first page, and optionally a single click always completes the action, even if congressional webforms require additional information.
Create New Action »

6.

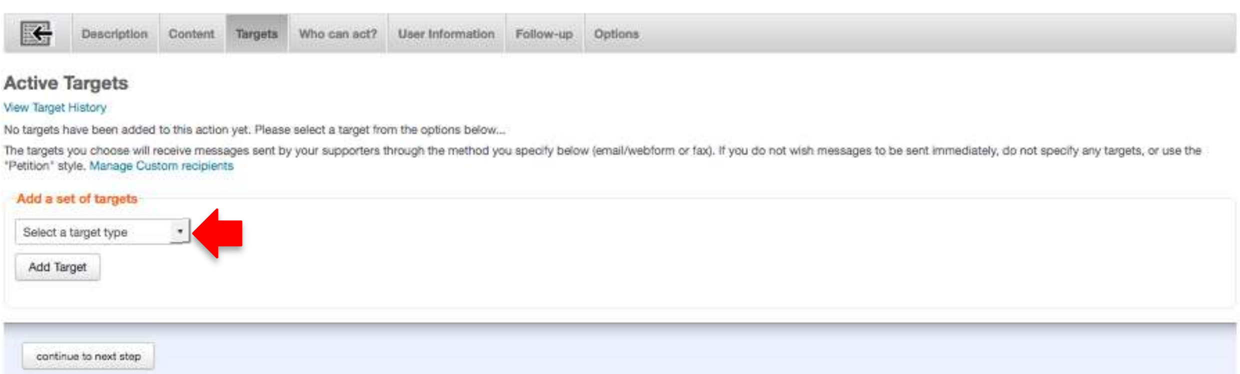


salsa
SEARCH...
Advocacy 3
untitled BARE BONES UI
Show Publishing Tools
Description
Content
Targets
Who can act?
User Information
Follow-up
Options
Reference Name
Used for internal reference
Action Title
The public action name
Brief Description
A brief description of what the action is about
Source
Style
Format
Normal
Font
Size
Online Actions and Petitions
Create an Action or Petition
List Actions
Letter to the Editor
Create an LTE
List LTEs
LTE Reports
Target Recipients
Create Recipients
List Recipients
Upload Recipient List
Manage Recipient Groups
Browse Warehouse
Browse Legislators
Browse Targeting
top ^
Footer
Appears after the signature form
save
save & continue
delete

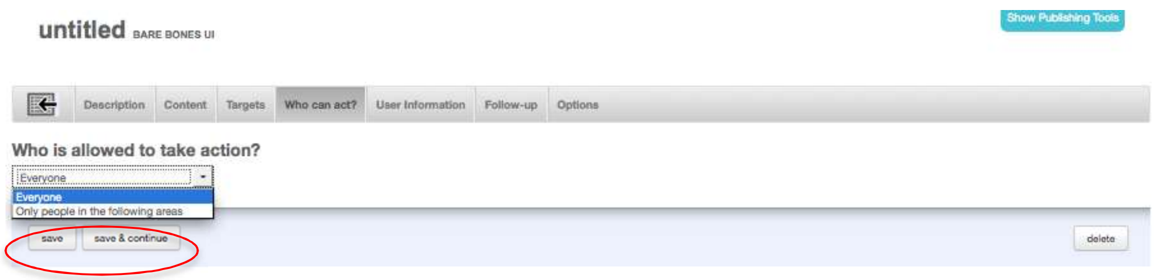
7.

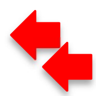

Description
Content
Targets
Who can act?
User Information
Follow-up
Options
Define multiple sets of content (explain this)
Primary Content
+ Add another content set...
Rename Set
Delete Set
+ Add Alternate Version
Recommended Letter Subject | Be specific (e.g. Support Bill HR57, not "Save the Whales")
Enter Your Action Subject
Make this subject uneditable
Recommended Letter Content | Be brief, but informative.
Your Action Content
Make this content uneditable | This is not recommended -- Repetitive form letters are often ignored
Save
continue to next step

8.

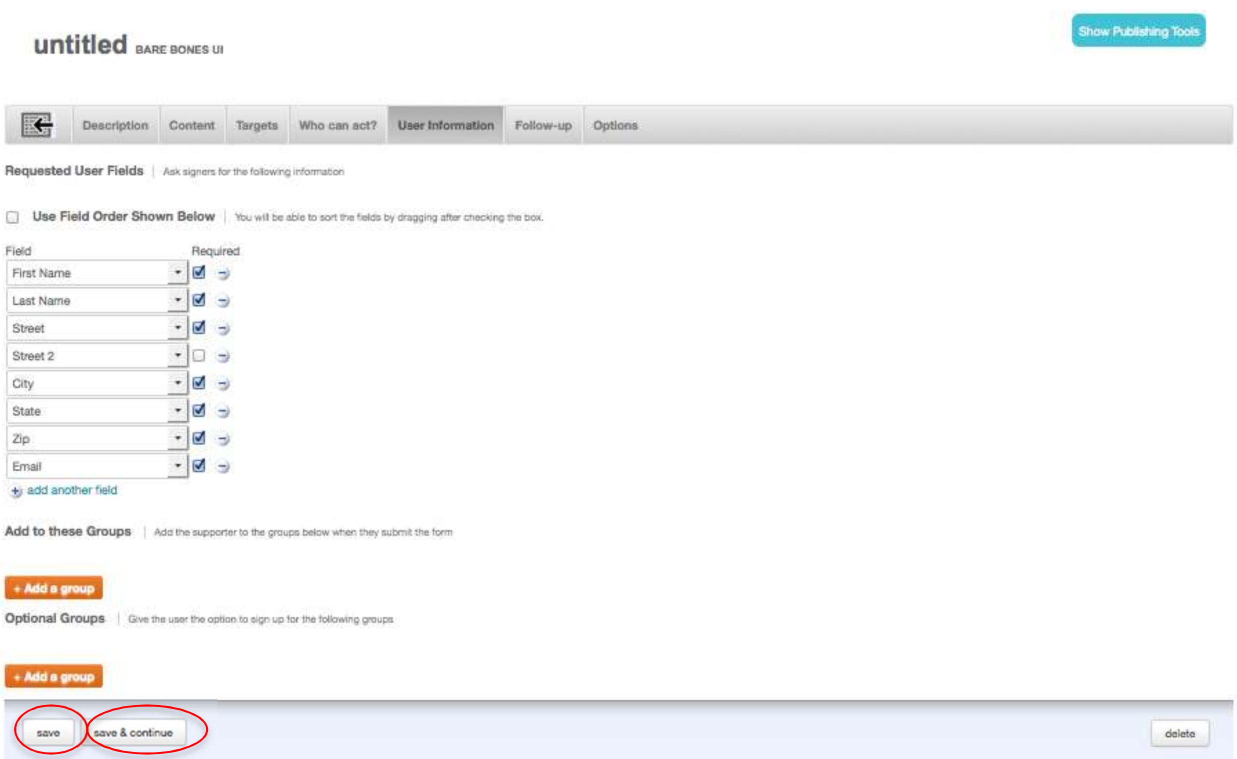

Description
Content
Targets
Who can act?
User Information
Follow-up
Options
Active Targets
View Target History
No targets have been added to this action yet. Please select a target from the options below...
The targets you choose will receive messages sent by your supporters through the method you specify below (email/webform or fax). If you do not wish messages to be sent immediately, do not specify any targets, or use the "Petition" style. Manage Custom recipients
Add a set of targets
Select a target type
Add Target
continue to next step

9.

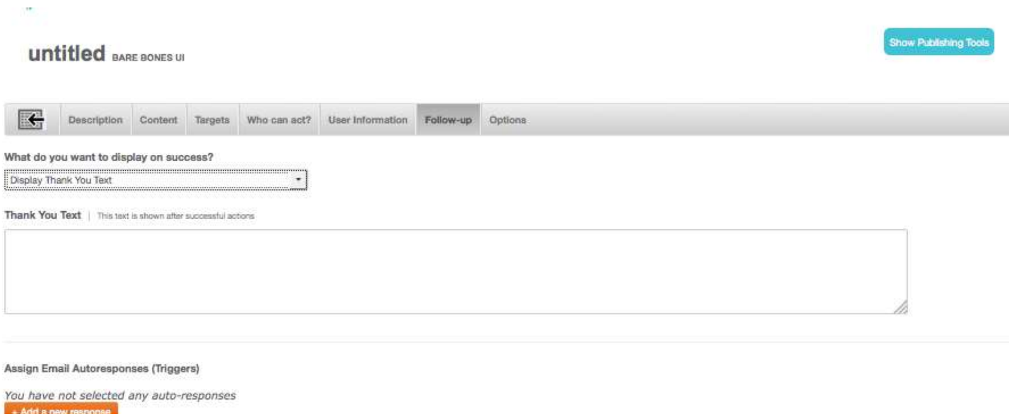

untitled BARE BONES UI
Show Publishing Tools
Description
Content
Targets
Who can act?
User Information
Follow-up
Options
Who is allowed to take action?
Everyone
Everyone
Only people in the following areas
save
save & continue
delete



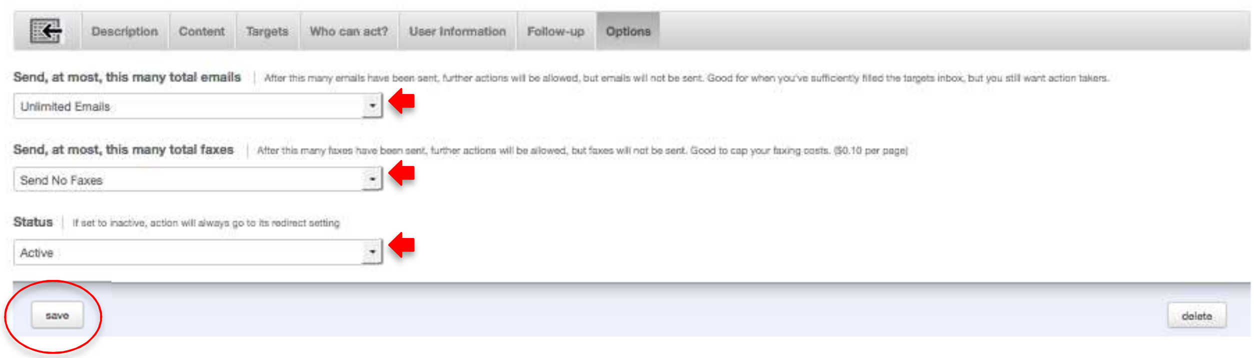
10.


untitled BARE BONES UI
Show Publishing Tools
Description
Content
Targets
Who can act?
User Information
Follow-up
Options
Requested User Fields
Ask signers for the following information
Use Field Order Shown Below
You will be able to sort the fields by dragging after checking the box.
Field
Required
First Name
Last Name
Street
Street 2
City
State
Zip
Email
add another field
Add to these Groups
Add the supporter to the groups below when they submit the form
+ Add a group
Optional Groups
Give the user the option to sign up for the following groups
+ Add a group
save
save & continue
delete

11.



12.



MULTI-CONTENT TARGETED ACTION

Purpose: To create a **Multi-Content Targeted Action**. According to SALSA, a Multi-Content Targeted Action allows the user to "Compose multiple sample letters, and determine which letter to present to your supporters based on the target. For example, compose a Thank You message to sponsors of a House bill, and an encouragement message to non-sponsors. Enhanced Direct Advocacy."

Procedure:

1. On the dashboard/homepage, select **Advocacy 3.**
2. A series of options will then appear on the right side of the screen.
3. Under Online Actions and Petitions, click on **Create an Action or Petition.**
4. Select **Multi-Content Targeted Action**.
5. Then Click on **Create New Action**.
6. You will then be redirected to the **Description** tab.
    a. In the first box entitled **Reference Name**, type the name you wish to call your Bare Bones UI. This name provides an internal reference point for the action. It is not visible nor will it become visible to the public.

    b. In the second box entitled **Action Title**, type the title of your action. This title will appear to the public.
    c. In the third box entitled **Brief Description**, provide a brief summary of what the action is about.
    d. In the fourth box entitled **Footer**, insert (if desired) a message that will appear after the signature form.
7. You will then be redirected to the **Content** tab.
    a. Briefly scroll down until you reach the editable boxes shown below.
    b. Under **Recommended Letter Subject**, insert the subject of the letter. Be specific.
    c. If you do not want to give the public the opportunity to edit subject of the letter, click on the box to the left of **Make this subject uneditable.**
    d. Under **Recommended Letter Content**, insert the body of the letter to be sent to legislators. Be brief.
    e. If you do not want to give the public the opportunity to edit the content of the letter, click on the box below **Make this content uneditable**.
    f. Click on **Save** to save content changes.
    g. Click on **continue to next step** to proceed.
8. You will then be redirected to the **Targets** tab.
    a. This section allows you to determine who the action will target. Click on the drop down menu under Add a set of targets to select a target type.
    b. After selecting the target type, click **Add Target.**
    e. The target type will appear under the **Type** column. In this case, US President is our target type. The method of transmitting the action will appear under the **Method** column. In this case Email/Webform is our method. Other available methods include blind hole, fax, and blind failover.
        i. Black Hole: silently send no messages.
        ii. Fax: Send a fax, at $0.10 per fax.
        iii. Blind Failover: Use Email/Webform unless the webform would require more user interaction; use a Fax if the fax limit has not been reached; otherwise, silently send no messages.
    f. The content type will appear under the **Content** column. In the drop down menu, you can choose which content type to include in the action.
        i. Note: It is possible to send different content to different legislators. For example, you can send a letter of gratitude the US President and a letter calling for action to the US Senate at the same time. This is called a Multi-Content Targeted Action
            1. To do so, under **target type,** you would select the **US President**. Then under content, you would select the pre-created content expressing gratitude.
            2. Next, select **US Senate** under **Add a set of targets.**
            3. Click **Add Target.**
            4. Under **Content,** choose the pre-created content type calling for action.
            5. Click **Continue to next step** to proceed.
9. You will then be redirected to the **Who can act?** tab.

   a. Select from the drop down menu who is allowed to take action. Options include **Everyone** and **Only people in the following areas**.
      i. If everyone is allowed to take action, select **Everyone.** Then click on **save & continue.**
      ii. If only certain people are allowed to take action based on geographic criteria, select **Only people in the following areas** from the drop down menu.
         1. Under **Restrict to these States**, select the state(s) in which participants will be allowed to take action.
         2. Under **Restrict to these Federal Districts**, select the district(s) in which participants will be allowed to take action.

            Note: To select multiple states and/or districts on a PC, hold down the control key while clicking on respective states. To select multiple states and/or districts on a Mac, hold down the command key while clicking on respective states.

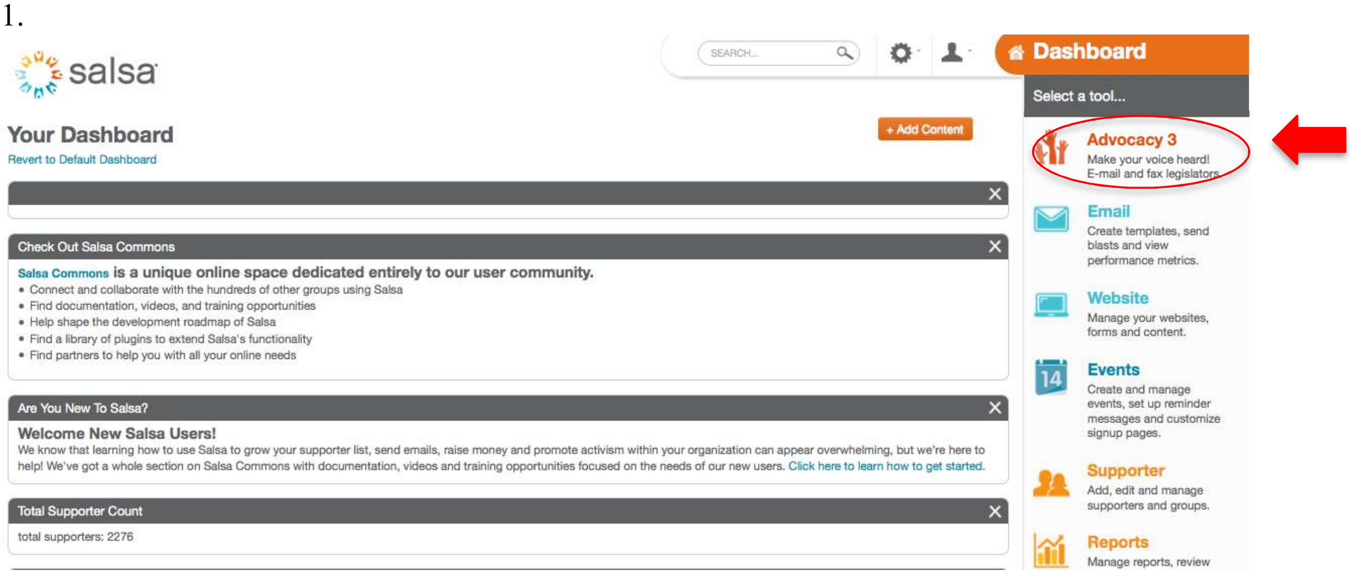
         3. Under **Text for Excluded Users**, include a message that will appear to participants who do not meet the geographic criteria of the action.
         4. Click **save & continue** to proceed.

10. You will then be redirected to the **User information** tab. This tab allows you to gather information about the action's participants.
   a. To add additional fields, click on add another field
   b. Choose which field to add from the drop down menu.
   c. If the field is required, click on the box so the check mark appears. If the field is not required, leave the box blank if the box is already blank. If the box is not already blank, click on the check mark to remove the checkmark, making the box blank.
   d. To remove a field, click on the encircled negative sign. The field will then disappear.
   e. To automatically add participants to a group after they have submitted their information, click on + Add a group
      i. Enter credentials if known then press Search to locate group.
      ii. Another avenue is to click Select next to the **Group_Name** of choice. That group will then be added.
   f. To give participants the option to join a group, click inside the box under **Optional Groups**. The same window as above will appear.
      i. Enter credentials if known then press Search to locate group.
      ii. Another avenue is to click Select next to the **Group_Name** of choice. That group will then be added.
   g. Press save & continue to proceed.

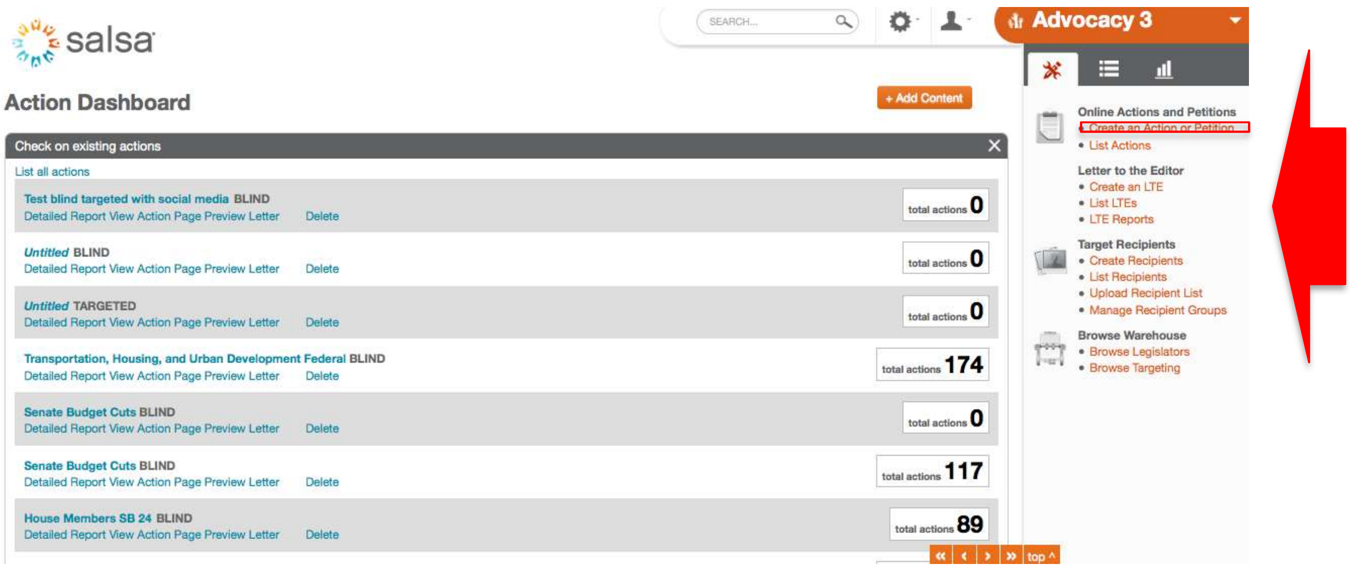
11. You will then be redirected to the **Follow-up** tab. This tab deals with the message that appears after a participant has submitted the action.
    a. Select the message you want to display after successful participation in the action by clicking in the box under **What do you want to display on success?** and choosing from the options that appear.
    b. The following box entitled **Thank You Text** provides space to insert a crafted message of gratitude that will appear after successful actions.
    c. To add an automated email response after participants have successfully taken part in the action, click on + Add an existing response.
        i. Enter credentials if known then press Search to locate group OR click on Select next to the **Reference_Name** of choice. That follow-up will then be added.
    d. Press save & continue to proceed.
12. You will then be redirected to the **Options** tab.
    a. To limit the number of emails participants send to legislators, click on the drop down box labeled **Unlimited Emails.** The following screen will appear. Select which option best suits your action's purpose: unlimited emails, Send No Emails or Webforms, Specify Email Limits
    b. Regarding faxes, select from the drop down menu labeled **Send No Faxes** which fax procedure best suits your action's purpose: Unlimited Faxes, Send No Faxes, Specify Fax Limit.
       Note: Each fax costs $0.10 per page

    c. To update the status (active or inactive) of the action, click on the box under **Status** labeled **Active.**
    d. Select **Inactive** if you want to put the action on hold. This will send participants to a redirect setting.
    e. Click on save to save progress.

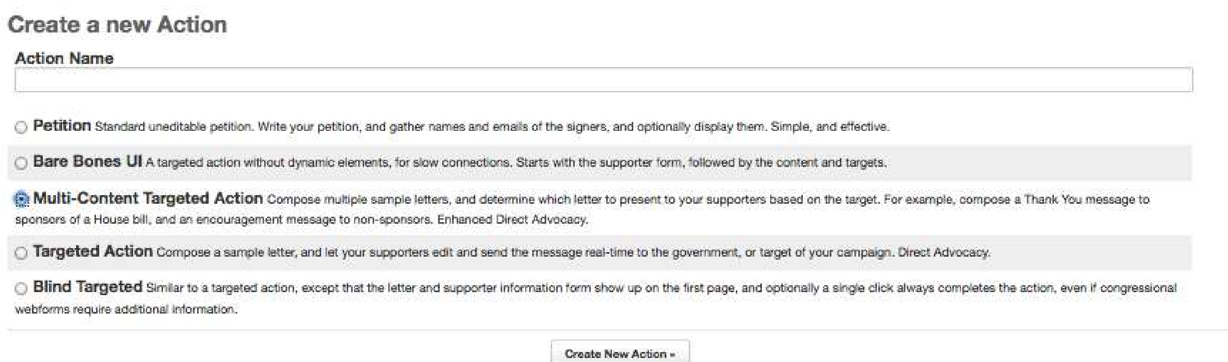
1.



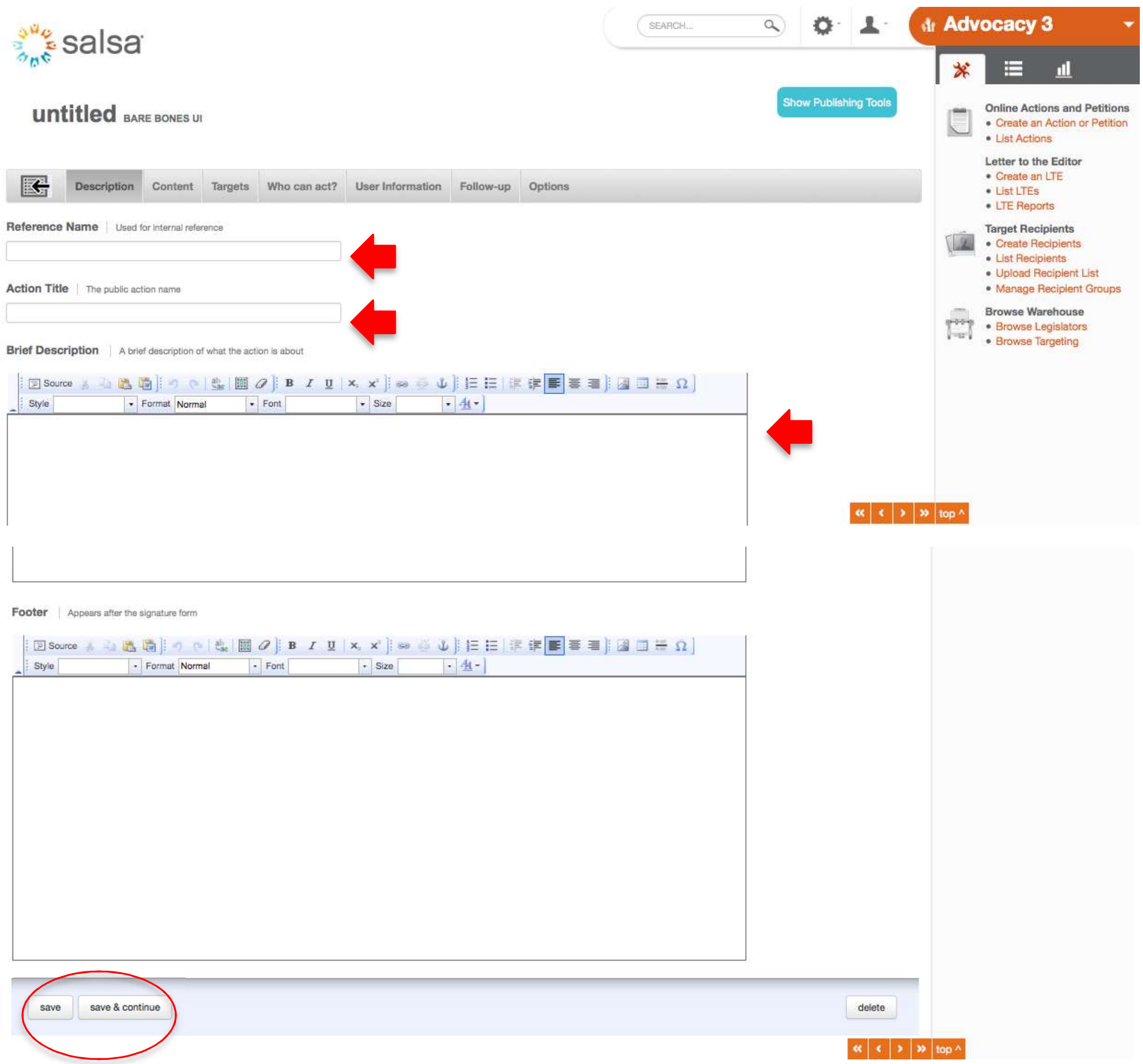
2. and 3.


salsa
SEARCH...
Advocacy 3
Action Dashboard
+ Add Content
Check on existing actions
List all actions
Test blind targeted with social media BLIND
Detailed Report View Action Page Preview Letter Delete
total actions 0
Untitled BLIND
Detailed Report View Action Page Preview Letter Delete
total actions 0
Untitled TARGETED
Detailed Report View Action Page Preview Letter Delete
total actions 0
Transportation, Housing, and Urban Development Federal BLIND
Detailed Report View Action Page Preview Letter Delete
total actions 174
Senate Budget Cuts BLIND
Detailed Report View Action Page Preview Letter Delete
total actions 0
Senate Budget Cuts BLIND
Detailed Report View Action Page Preview Letter Delete
total actions 117
House Members SB 24 BLIND
Detailed Report View Action Page Preview Letter Delete
total actions 89
top ^
Online Actions and Petitions
• Create an Action or Petition
• List Actions
Letter to the Editor
• Create an LTE
• List LTEs
• LTE Reports
Target Recipients
• Create Recipients
• List Recipients
• Upload Recipient List
• Manage Recipient Groups
Browse Warehouse
• Browse Legislators
• Browse Targeting

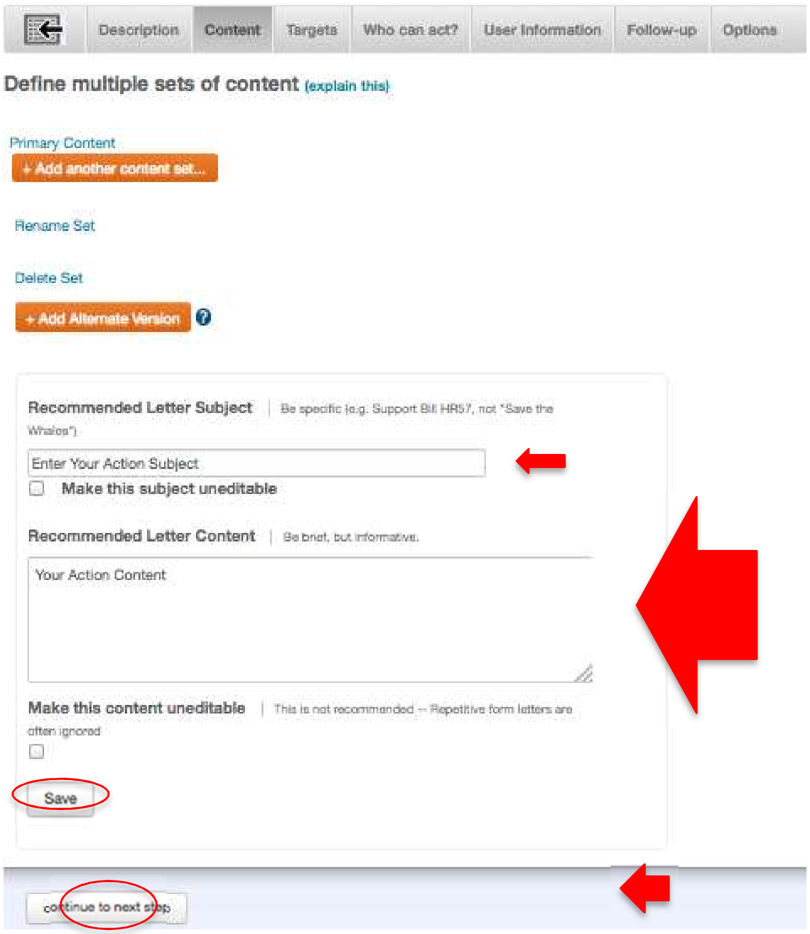
4. and 5.


Create a new Action
Action Name
Petition Standard uneditable petition. Write your petition, and gather names and emails of the signers, and optionally display them. Simple, and effective.
Bare Bones UI A targeted action without dynamic elements, for slow connections. Starts with the supporter form, followed by the content and targets.
Multi-Content Targeted Action Compose multiple sample letters, and determine which letter to present to your supporters based on the target. For example, compose a Thank You message to sponsors of a House bill, and an encouragement message to non-sponsors. Enhanced Direct Advocacy.
Targeted Action Compose a sample letter, and let your supporters edit and send the message real-time to the government, or target of your campaign. Direct Advocacy.
Blind Targeted Similar to a targeted action, except that the letter and supporter information form show up on the first page, and optionally a single click always completes the action, even if congressional webforms require additional information.
Create New Action »

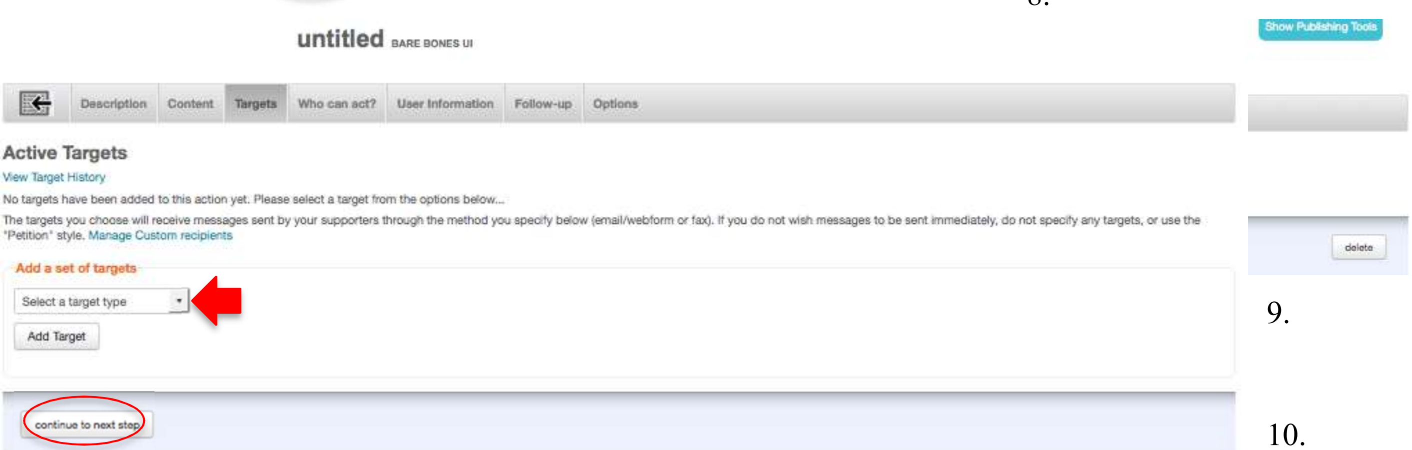
6.


salsa
SEARCH...
Advocacy 3
Show Publishing Tools
untitled BARE BONES UI
Description
Content
Targets
Who can act?
User Information
Follow-up
Options
Reference Name
Used for internal reference
Action Title
The public action name
Brief Description
A brief description of what the action is about
Footer
Appears after the signature form
save
save & continue
delete
Online Actions and Petitions
Create an Action or Petition
List Actions
Letter to the Editor
Create an LTE
List LTEs
LTE Reports
Target Recipients
Create Recipients
List Recipients
Upload Recipient List
Manage Recipient Groups
Browse Warehouse
Browse Legislators
Browse Targeting
top ^

7.

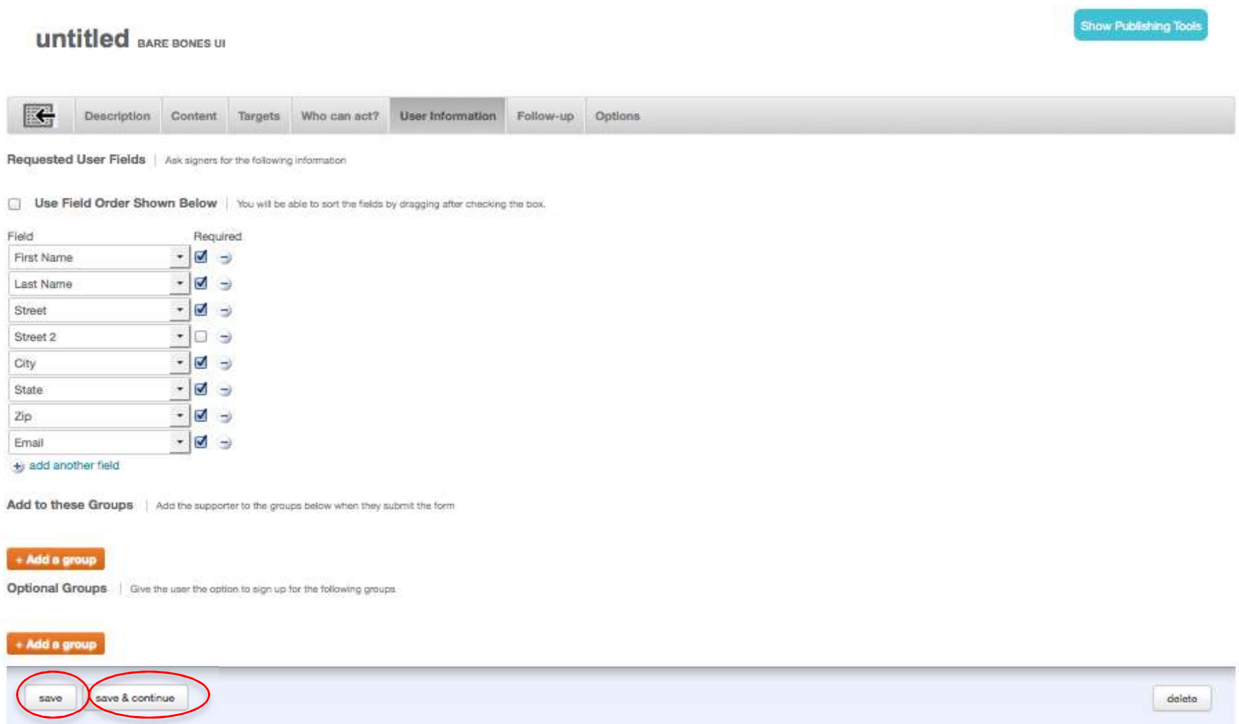

Description
Content
Targets
Who can act?
User Information
Follow-up
Options
Define multiple sets of content (explain this)
Primary Content
+ Add another content set...
Rename Set
Delete Set
+ Add Alternate Version
Recommended Letter Subject | Be specific (e.g. Support Bill HR57, not "Save the Whales")
Enter Your Action Subject
Make this subject uneditable
Recommended Letter Content | Be brief, but informative.
Your Action Content
Make this content uneditable | This is not recommended -- Repetitive form letters are often ignored
Save
continue to next step

8.

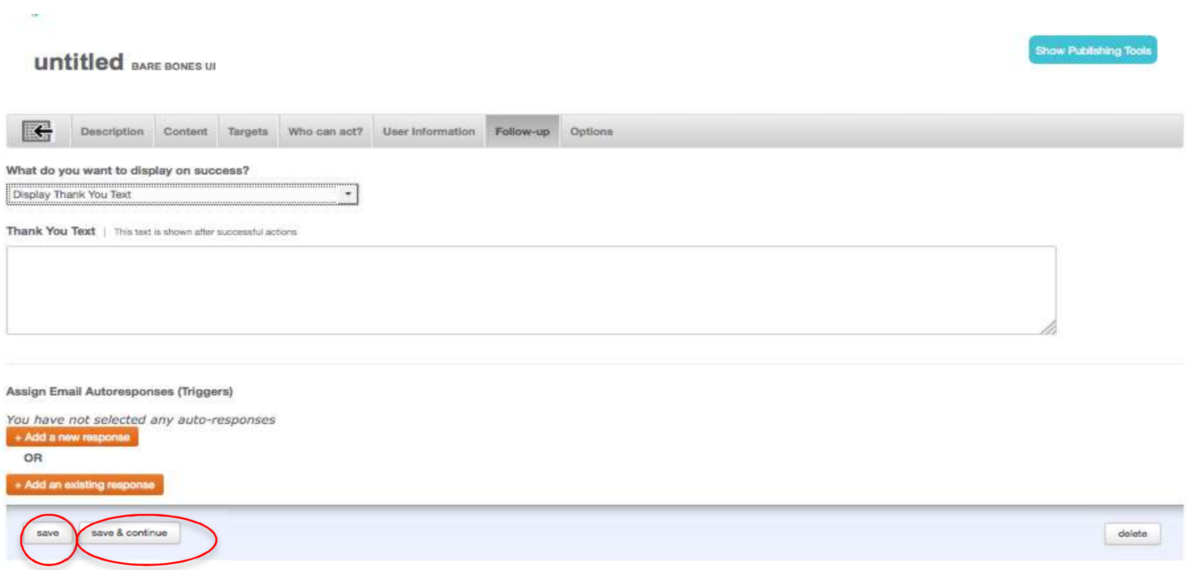

untitled BARE BONES UI
Show Publishing Tools
Description
Content
Targets
Who can act?
User Information
Follow-up
Options
Active Targets
View Target History
No targets have been added to this action yet. Please select a target from the options below...
The targets you choose will receive messages sent by your supporters through the method you specify below (email/webform or fax). If you do not wish messages to be sent immediately, do not specify any targets, or use the "Petition" style. Manage Custom recipients
Add a set of targets
Select a target type
Add Target
delete
continue to next step

9.

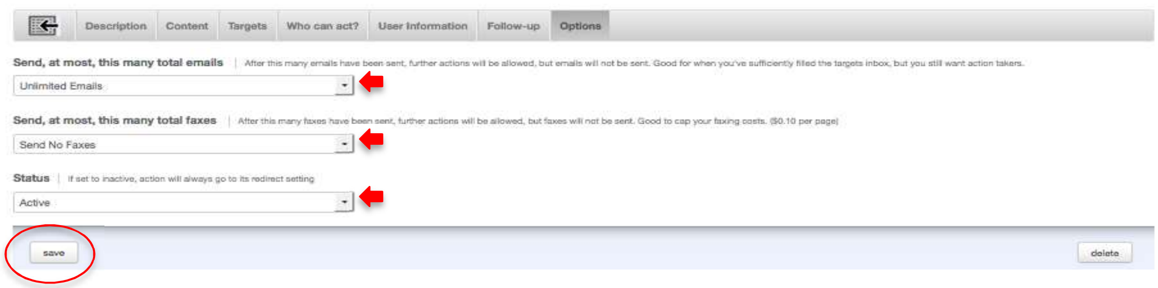
10.


untitled BARE BONES UI
Show Publishing Tools
Description
Content
Targets
Who can act?
User Information
Follow-up
Options
Requested User Fields | Ask signers for the following information
Use Field Order Shown Below | You will be able to sort the fields by dragging after checking the box.
Field
Required
First Name
Last Name
Street
Street 2
City
State
Zip
Email
add another field
Add to these Groups | Add the supporter to the groups below when they submit the form
+ Add a group
Optional Groups | Give the user the option to sign up for the following groups
+ Add a group
save
save & continue
delete

11.


untitled BARE BONES UI
Show Publishing Tools
Description
Content
Targets
Who can act?
User Information
Follow-up
Options
What do you want to display on success?
Display Thank You Text
Thank You Text | This text is shown after successful actions
Assign Email Autoresponses (Triggers)
You have not selected any auto-responses
+ Add a new response
OR
+ Add an existing response
save
save & continue
delete

12.



TARGETED ACTION

<u>Purpose</u>: To create a **Targeted Action**. According to SALSA, a **Targeted Action** allows the user to compose a sample letter, and let supporters edit and send the message real-time to the government, or target of your campaign. Direct Advocacy."

<u>Procedure</u>:

1. On the dashboard/homepage, select **Advocacy 3.**
2. A series of options will then appear on the right side of the screen.
3. Under Online Actions and Petitions, click on **Create an Action or Petition.**
4. Select **Multi-Content Targeted Action**.
5. Then Click on **Create New Action**.
6. You will then be redirected to the **Description** tab.
    a. In the first box entitled **Reference Name**, type the name you wish to call your Bare Bones UI. This name provides an internal reference point for the action. It is not visible nor will it become visible to the public.
    b. In the second box entitled **Action Title**, type the title of your action. This title will appear to the public.
    c. In the third box entitled **Brief Description**, provide a brief summary of what the action is about.

d. In the fourth box entitled **Footer**, insert (if desired) a message that will appear after the signature form.

7. You will then be redirected to the **Content** tab.
    a. Briefly scroll down until you reach the editable boxes shown below.
    b. Under **Recommended Letter Subject**, insert the subject of the letter. Be specific.
    c. If you do not want to give the public the opportunity to edit subject of the letter, click on the box to the left of **Make this subject uneditable.**
    d. Under **Recommended Letter Content**, insert the body of the letter to be sent to legislators. Be brief.
    e. If you do not want to give the public the opportunity to edit the content of the letter, click on the box below **Make this content uneditable**.
    f. Click on **Save** to save content changes.
    g. Click on **continue to next step** to proceed.
8. You will then be redirected to the **Targets** tab.
    a. This section allows you to determine who the action will target. Click on the drop down menu under Add a set of targets to select a target type.
    b. After selecting the target type, click **Add Target.**
    c. The target type will appear under the **Type** column. In this case, US President is our target type. The method of transmitting the action will appear under the **Method** column. In this case Email/Webform is our method. Other available methods include blind hole, fax, and blind failover.
        i. Black Hole: silently send no messages.
        ii. Fax: Send a fax, at $0.10 per fax.
        iii. Blind Failover: Use Email/Webform unless the webform would require more user interaction; use a Fax if the fax limit has not been reached; otherwise, silently send no messages.
    d. The content type will appear under the **Content** column. In the drop down menu, you can choose which content type to include in the action.
        i. Note: It is possible to send different content to different legislators. For example, you can send a letter of gratitude the US President and a letter calling for action to the US Senate at the same time. This is called a Multi-Content Targeted Action
            1. To do so, under **target type,** you would select the **US President**. Then under content, you would select the pre-created content expressing gratitude.
            2. Next, select **US Senate** under **Add a set of targets.**
            3. Click **Add Target.**
            4. Under **Content,** choose the pre-created content type calling for action.
            5. Click **Continue to next step** to proceed.
9. You will then be redirected to the **Who can act?** tab
    b. Select from the drop down menu who is allowed to take action. Options include **Everyone** and **Only people in the following areas**.
        i. If everyone is allowed to take action, select **Everyone.** Then click on **save & continue.**

ii. If only certain people are allowed to take action based on geographic criteria, select **Only people in the following areas** from the drop down menu.

1. Under **Restrict to these States**, select the state(s) in which participants will be allowed to take action.
2. Under **Restrict to these Federal Districts**, select the district(s) in which participants will be allowed to take action.
   Note: To select multiple states and/or districts on a PC, hold down the control key while clicking on respective states. To select multiple states and/or districts on a Mac, hold down the command key while clicking on respective states.
3. Under **Text for Excluded Users**, include a message that will appear to participants who do not meet the geographic criteria of the action.
4. Click **save & continue** to proceed

10. You will then be redirected to the **User information** tab. This tab allows you to gather information about the action's participants.
    a. To add additional fields, click on add another field
    b. Choose which field to add from the drop down menu.
    c. If the field is required, click on the box so the check mark appears. If the field is not required, leave the box blank if the box is already blank. If the box is not already blank, click on the check mark to remove the checkmark, making the box blank.
    d. To remove a field, click on the encircled negative sign. The field will then disappear.
    e. To automatically add participants to a group after they have submitted their information, click on + Add a group
       i. Enter credentials if known then press Search to locate group.
       ii. Another avenue is to click Select next to the **Group_Name** of choice. That group will then be added.
    f. To give participants the option to join a group, click inside the box under **Optional Groups**. The same window as above will appear.
       i. Enter credentials if known then press Search to locate group.
       ii. Another avenue is to click Select next to the **Group_Name** of choice. That group will then be added.
    g. Press save & continue to proceed.
11. You will then be redirected to the **Follow-up** tab. This tab deals with the message that appears after a participant has submitted the action.

a. Select the message you want to display after successful participation in the action by clicking in the box under **What do you want to display on success?** and choosing from the options that appear.
b. The following box entitled **Thank You Text** provides space to insert a crafted message of gratitude that will appear after successful actions.
c. To add an automated email response after participants have successfully taken part in the action, click on + Add an existing response.
    i. Enter credentials if known then press Search to locate group OR click on Select next to the **Reference_Name** of choice. That follow-up will then be added.
d. Press save & continue to proceed.

12. You will then be redirected to the **Options** tab.
    a. To limit the number of emails participants send to legislators, click on the drop down box labeled **Unlimited Emails.** The following screen will appear. Select which option best suits your action's purpose: unlimited emails, Send No Emails or Webforms, Specify Email Limits.
    b. Regarding faxes, select from the drop down menu labeled **Send No Faxes** which fax procedure best suits your action's purpose: Unlimited Faxes, Send No Faxes, Specify Fax Limit.
    Note: Each fax costs $0.10 per page
    c. To update the status (active or inactive) of the action, click on the box under **Status** labeled **Active.**
    d. Select **Inactive** if you want to put the action on hold. This will send participants to a redirect setting.
    e. Click on save to save progress.

BLIND TARGETED ACTION

Purpose: To create a **Blind Targeted Action**. According to SALSA, a **Blind Targeted Action** is "similar to a targeted action, except that the letter and supporter information form show up on the first page, and optionally a single click always completes the action, even if congressional webforms require additional information.

Procedure:

1. On the dashboard/homepage, select **Advocacy 3.**
2. A series of options will then appear on the right side of the screen.
3. Under Online Actions and Petitions, click on **Create an Action or Petition.**
4. Select **Multi-Content Targeted Action**.
5. Then Click on **Create New Action**.
6. You will then be redirected to the **Description** tab.
    a. In the first box entitled **Reference Name**, type the name you wish to call your Bare Bones UI. This name provides an internal reference point for the action. It is not visible nor will it become visible to the public.

    b. In the second box entitled **Action Title**, type the title of your action. This title will appear to the public.
    c. In the third box entitled **Brief Description**, provide a brief summary of what the action is about.
    d. In the fourth box entitled **Footer**, insert (if desired) a message that will appear after the signature form.
7. You will then be redirected to the **Content** tab.
    a. Briefly scroll down until you reach the editable boxes shown below.
    b. Under **Recommended Letter Subject**, insert the subject of the letter. Be specific.
    c. If you do not want to give the public the opportunity to edit subject of the letter, click on the box to the left of **Make this subject uneditable.**
    d. Under **Recommended Letter Content**, insert the body of the letter to be sent to legislators. Be brief.
    e. If you do not want to give the public the opportunity to edit the content of the letter, click on the box below **Make this content uneditable**.
    f. Click on **Save** to save content changes.
    g. Click on **continue to next step** to proceed.
8. You will then be redirected to the **Targets** tab.
    a. This section allows you to determine who the action will target. Click on the drop down menu under Add a set of targets to select a target type.
    b. After selecting the target type, click **Add Target.**
    c. The target type will appear under the **Type** column. In this case, US President is our target type. The method of transmitting the action will appear under the **Method** column. In this case Email/Webform is our method. Other available methods include blind hole, fax, and blind failover.
        i. Black Hole: silently send no messages.
        ii. Fax: Send a fax, at $0.10 per fax.
        iii. Blind Failover: Use Email/Webform unless the webform would require more user interaction; use a Fax if the fax limit has not been reached; otherwise, silently send no messages.
    d. The content type will appear under the **Content** column. In the drop down menu, you can choose which content type to include in the action.
        i. Note: It is possible to send different content to different legislators. For example, you can send a letter of gratitude the US President and a letter calling for action to the US Senate at the same time. This is called a Multi-Content Targeted Action
            1. To do so, under **target type,** you would select the **US President**. Then under content, you would select the pre-created content expressing gratitude.
            2. Next, select **US Senate** under **Add a set of targets.**
            3. Click **Add Target.**
            4. Under **Content,** choose the pre-created content type calling for action.
            5. Click **Continue to next step** to proceed.
9. You will then be redirected to the **Who can act?** tab

a. Select from the drop down menu who is allowed to take action. Options include **Everyone** and **Only people in the following areas**.
   i. If everyone is allowed to take action, select **Everyone.** Then click on **save & continue.**
   ii. If only certain people are allowed to take action based on geographic criteria, select **Only people in the following areas** from the drop down menu.
      1. Under **Restrict to these States**, select the state(s) in which participants will be allowed to take action.
      2. Under **Restrict to these Federal Districts**, select the district(s) in which participants will be allowed to take action.
         Note: To select multiple states and/or districts on a PC, hold down the control key while clicking on respective states. To select multiple states and/or districts on a Mac, hold down the command key while clicking on respective states.

      3. Under **Text for Excluded Users**, include a message that will appear to participants who do not meet the geographic criteria of the action.
      4. Click **save & continue** to proceed.

10. You will then be redirected to the **User information** tab. This tab allows you to gather information about the action's participants.
   a. To add additional fields, click on add another field
   b. Choose which field to add from the drop down menu.
   c. If the field is required, click on the box so the check mark appears. If the field is not required, leave the box blank if the box is already blank. If the box is not already blank, click on the check mark to remove the checkmark, making the box blank.
   d. To remove a field, click on the encircled negative sign . The field will then disappear.
   e. To automatically add participants to a group after they have submitted their information, click on + Add a group
      i. The following sub window will appear
      ii. Enter credentials if known then press Search to locate group.
      iii. Another avenue is to click Select next to the **Group_Name** of choice. That group will then be added.
   f. To give participants the option to join a group, click inside the box under **Optional Groups**. The same window as above will appear.
      i. Enter credentials if known then press Search to locate group.
      ii. Another avenue is to click Select next to the **Group_Name** of choice. That group will then be added.
   g. Press save & continue to proceed.

11. You will then be redirected to the **Follow-up** tab. This tab deals with the message that appears after a participant has submitted the action.
    a. Select the message you want to display after successful participation in the action by clicking in the box under **What do you want to display on success?** and choosing from the options that appear.
    b. The following box entitled **Thank You Text** provides space to insert a crafted message of gratitude that will appear after successful actions.
    c. To add an automated email response after participants have successfully taken part in the action, click on + Add an existing response.
        i. Enter credentials if known then press Search to locate group OR click on Select next to the **Reference_Name** of choice. That follow-up will then be added.
    d. Press save & continue to proceed.
12. You will then be redirected to the **Options** tab.
    a. To limit the number of emails participants send to legislators, click on the drop down box labeled **Unlimited Emails.** The following screen will appear. Select which option best suits your action's purpose: unlimited emails, Send No Emails or Webforms, Specify Email Limits.
    b. Regarding faxes, select from the drop down menu labeled **Send No Faxes** which fax procedure best suits your action's purpose: Unlimited Faxes, Send No Faxes, Specify Fax Limit.
    Note: Each fax costs $0.10 per page.
    c. To update the status (active or inactive) of the action, click on the box under **Status** labeled **Active.**
    d. Select **Inactive** if you want to put the action on hold. This will send participants to a redirect setting.
    e. Click on save to save progress.

VIEW PREVIOUSLY CREATED ACTIONS AND ACTION OVERVIEWS

Purpose: To view previously created actions and action overviews.

Procedure:

1. On the dashboard/homepage, select **Advocacy 3.**
2. A series of options will then appear on the right side of the screen.
3. Under Online Actions and Petitions, click on **List Actions.**
4. Once you have arrived at the above screen, click on Details to view specific details of a given action.
5. Click on Report to view action overview and target details. This information includes, for example, the total number of actions taken, the total number of messages sent, the number of targets receiving the message, distinct messages composed, and the number of district supporters.

COPY/CLONE PREVIOUSLY CREATED ACTIONS

Purpose: To clone or copy a previously created action

Procedure:

1. On the dashboard/homepage, select **Advocacy 3.**
2. A series of options will then appear on the right side of the screen.
3. Under Online Actions and Petitions, click on **List Actions.**
4. Once you have arrived at the above screen, click on Copy.

DELETE/REMOVE PREVIOUSLY CREATED ACTION

Purpose: To delete or remove a previously created action.

Procedure:

1. On the dashboard/homepage, select **Advocacy 3.**
2. A series of options will then appear on the right side of the screen.
3. Under Online Actions and Petitions, click on **List Actions.**
4. Once you have arrived at the above screen, click on Remove.

ADD/CREATE NEW RECIPIENTS OF ACTIONS

Purpose: To create new recipients of actions

Procedure:

1. On the dashboard/homepage, select **Advocacy 3.**
2. A series of options will then appear on the right side of the screen.
3. Under the Target Recipients heading, click on **Create Recipients.**
4. The following screen will appear.
    a. Enter credentials into respective boxes
    b. Click **save & continue**.
5. You will then be redirected to the **Other information** tab.
    a. Enter credentials in respective boxes.
    b. Press **save & continue.**
    You will then be redirected to the **Targeting Options** tab.
    c. Select the **Preferred Contact Method** from the drop down menu. Options include: Email, Fax, and Phone.
    d. If the action is region/state specific, meaning only people from certain states can participate, click on the specific states under the **Region Restrictions** tab.
    Note: To select more than one state on a PC, hold down the CTRL key while clicking on each state. To select more than one state on a Mac, hold down the command key while clicking on each state.
    e. If there are postal code restrictions, enter the allowed postal codes in the box titled **Postal Code Restrictions.**
    f. The next option is the **Postal Restriction Radius**. You can specify the distance (in miles) surrounding the postal codes listed in the Postal Code Restrictions box where the recipient will be included. This function is for US recipients only.
    g. According to SALSA, “many targets require phone numbers to be sent with a message.” To block sender phone numbers, click inside the box below **Block**

sending supporter phone numbers. A checkmark will then appear inside the box.

h. According to SALSA, "many targets require addresses to be sent with a message." To block sender address, click inside the box below **Block sending supporter street address**. A checkmark will then appear inside the box.

i. Click **save & continue**.

VEW A LIST OF ACTION RECIPIENTS

Purpose: To view a list of action recipients.

Procedure:

1. On the dashboard/homepage, select **Advocacy 3.**
2. A series of options will then appear on the right side of the screen.
3. Under the Target Recipients heading, click on **List Recipients.** The following screen will appear.
    a. Click on Details to view specific details of a given recipient.
    b. Click on Copy to copy or clone a specific recipient.
    c. Click on Remove to delete a specific recipient.

Tab 3: Email

CREATING AN EMAIL BLAST

PURPOSE: To set up an email blast, in order to spread the word and call supporters to action.

PROCEDURE:

1. To set up an email blast, choose the email package under the dashboard.
2. Once you are on the email page, choose the "create blasts" option on the ride side of the screen.
3. Fill out the reference name for the email blast.
4. Select a template, click save, and then click save & continue. After doing so, all of the other tabs should become available.
5. IMPORTANT: Do not click "edit" to edit the template. This will destroy the template. You will be able to edit the template in the next tab after clicking save and continue.

CONTENT PAGE

6. Fill out the information for which email address the email blast will be sent FROM, as well as the email address the supporters will REPLY-TO. The FROM address does not have to be the same as the REPLY-TO address.
7. Fill in the subject line. This is an IMPORTANT step. This line will encourage the supporters to open the email. Do not make it misleading, but make sure it is interesting and engaging.
8. **HTML Content and Text Content:**
    a. This section allows you to compose the content for your email. Some supporters may choose to get plain text emails. In other words, they will not download images or fancy formatting. They just get the plain text. It's important to

configure both types. It's better to start with the HTML because it is more advanced.

9. Composing Content.
    a. You may choose to do this in Google doc or within Salsa
        i. Avoid Microsoft Word. Word will put the content in weird codes that messes up how the email will be displayed. The code can also get caught in spam traps and then the email cannot be sent.
10. After completing the HTML Content side, insert the information on the Text Content side.
    a. You can copy and paste everything OR you can click "auto-generate text from html."
        i. A window should pop up saying that anything in the window is about to be removed and replaced with what you put on the HTML content tab.
        ii. Once the content has been transferred, you may need to clean up some of the text and extra spaces. Click Save and Continue.

SEND OPTIONS PAGE

1. Click "Add to Web Page." (Recommended)
    a. This will allow you to automatically add this email to a public archives page.

TARGETING

1. This step allows you to decide whom the email will be sent to.
    a. Option 1: Click "Send to the entire list."
    b. Option 2: Select or create a new query.
        i. If you have a previously saved query, you can pull that up by going to "select category" and choosing "groups, OR you can create a new query by selecting "new query."
        ii. In the next area "supporter is a member of", choose which groups you want to include in the query by selecting a category. You can add another category by clicking the green plus sign on the far right. Click save and continue.

VALIDATION

1. **Spam checker:**
    a. Click on more information to review a spam report to make sure your email doesn't trigger any basic spam tests.
    b. Make sure that there is no red exclamation points – if there are, the email is not ready to be sent.
    c. Green check marks mean that there is no problem.
    d. If the number in the spam checker is anywhere close to a 5 that might be a problem.
    e. If there is a red exclamation point, click more information to resolve any issues.
2. **Test Email:**

This section allows you to send a test version to yourself, your coworkers, or whoever. This step is a good idea for proofreading purposes.

a. Enter your email address.
b. Check the box below if you want to receive both the text and html versions
c. Also, check "insert text email disclaimer in content" if you are concerned that your coworkers may think it is a live version
d. Click "send test email."
e. You may proofread the test before continuing to the next step.

SUMMARY

Purpose: This step allows you to review the email set-up (your previous steps) and to submit the email blast.

Procedure:

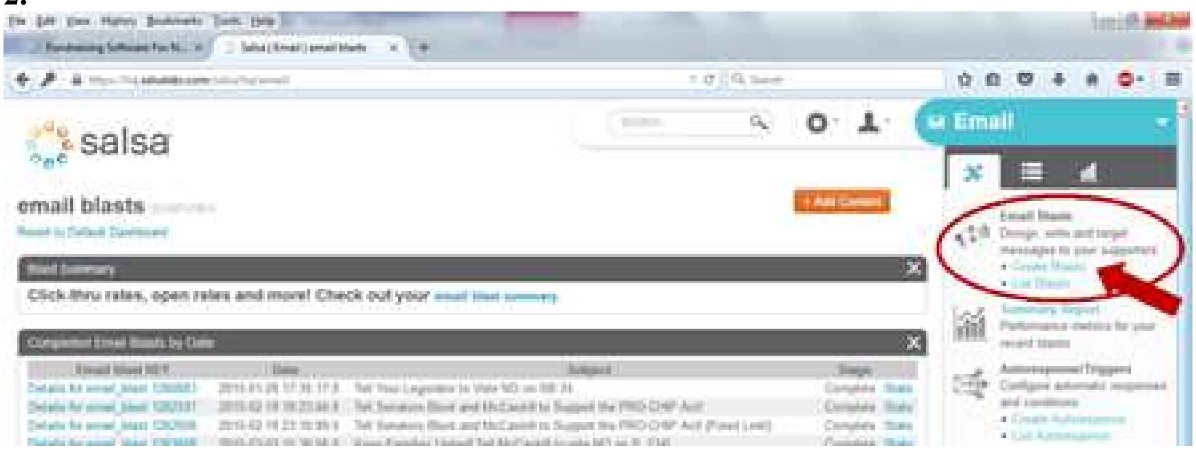
1. **Review:** Under "Content Preview", you can click for a "HTML Preview" and a "Text Preview". The review will tell you the number of people the email will be sent to.
   a. That number may not be accurate – you can read more about why that is below that section of the Summary.
   b. You can run a/b split test. However, it is better if you are sending to thousands of people. You will receive more confident results.

2. **Submit: (????????????)**
   a. To send out an email immediately after you are finished creating it:
      i. Click "Submit Email for Scheduled Time."
      ii. A pop-up should appear saying "(number) emails will be sent. Are you sure?"
      iii. Click Ok.
   b. To schedule an email to be sent at a later time.
      i. Click reschedule.
      ii. Select a date/time.
      Note: Keep in mind that the time listed is in Eastern Time and cannot be changed to a different time zone– you will need to translate the time you would like to send out your blast into Eastern Time.
      iii. Even though it won't be sent until later you still need to click "**submit blast now**." It will be sent at the scheduled time.

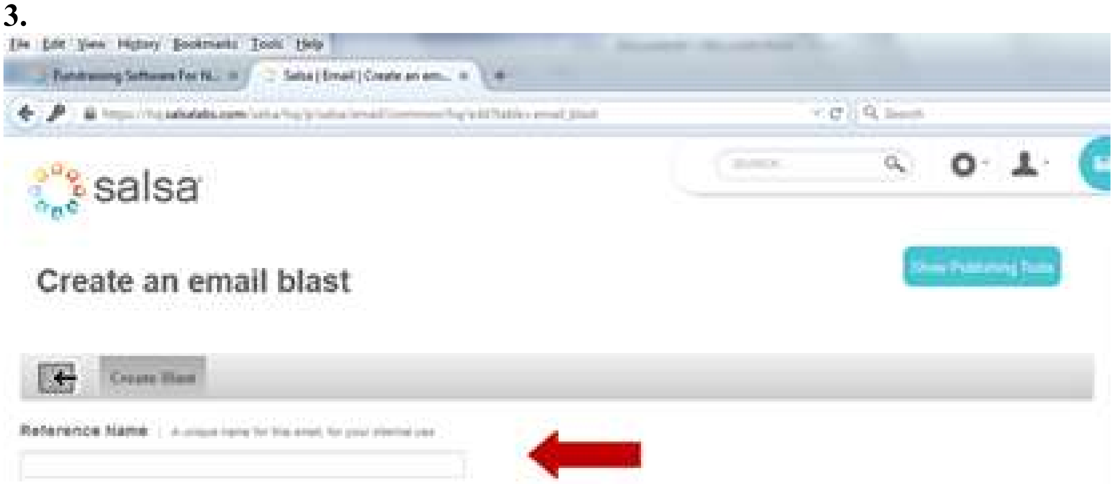
1.


salsa
Your Dashboard
Dashboard
Email

2.


salsa
email blasts
Email

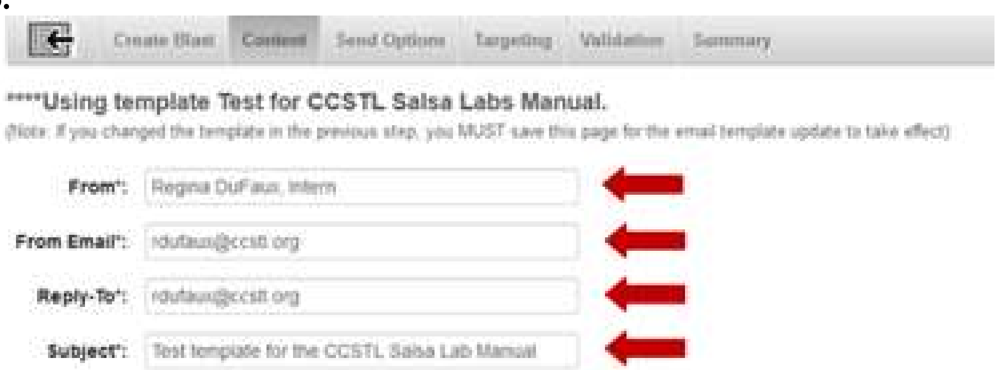
3.


salsa
Create an email blast
Reference Name

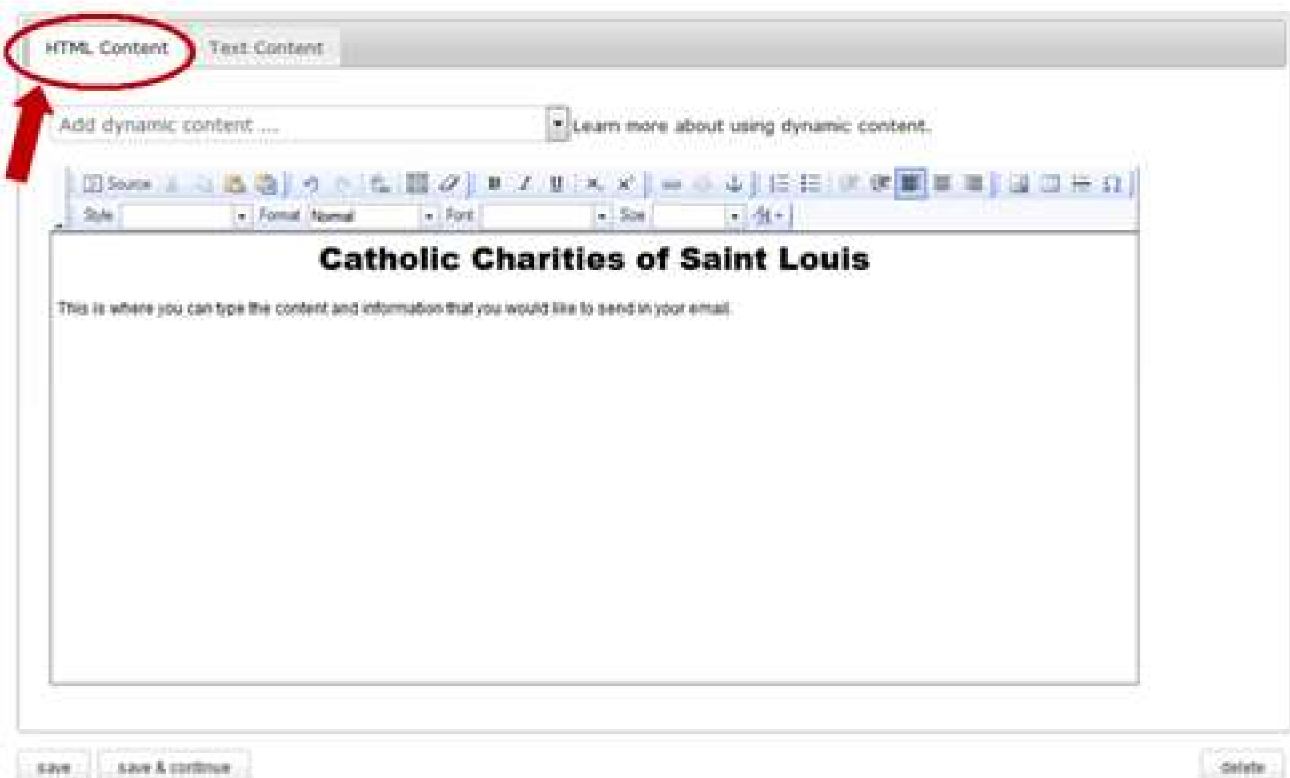
4.


Sidebar Hero Template - Salsa Setup
Test for CCSTL Salsa Labs Manual
Preview | Edit | Refresh Thumbnail
Preview | Edit | Refresh Thumbnail
Generating Thumbnail
salsa
Choose a Template
save

5.

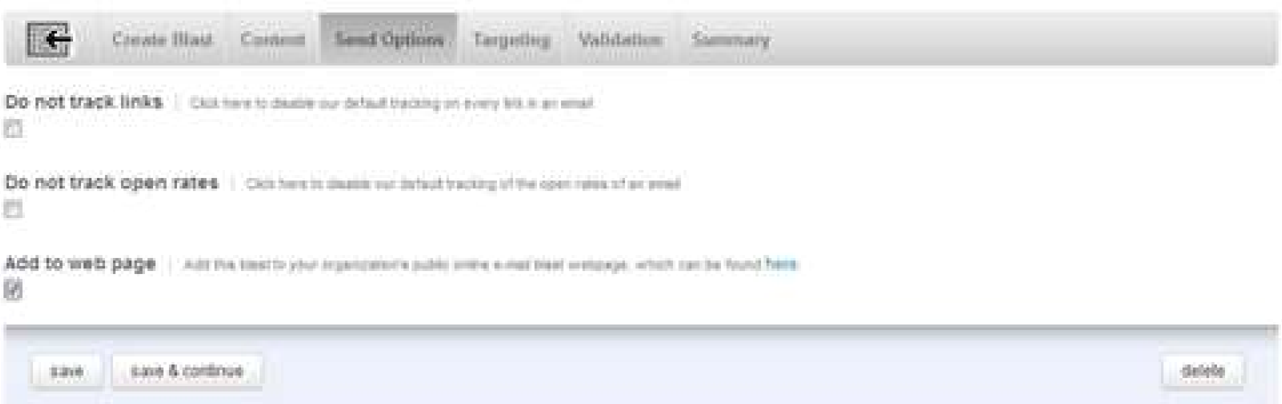

Create Blast
Content
Send Options
Targeting
Validation
Summary
****Using template Test for CCSTL Salsa Labs Manual.
(Note: If you changed the template in the previous step, you MUST save this page for the email template update to take effect)
From*:
Regina DuFaux, Intern
From Email*:
rdufaux@ccstl.org
Reply-To*:
rdufaux@ccstl.org
Subject*:
Test template for the CCSTL Salsa Lab Manual

6.

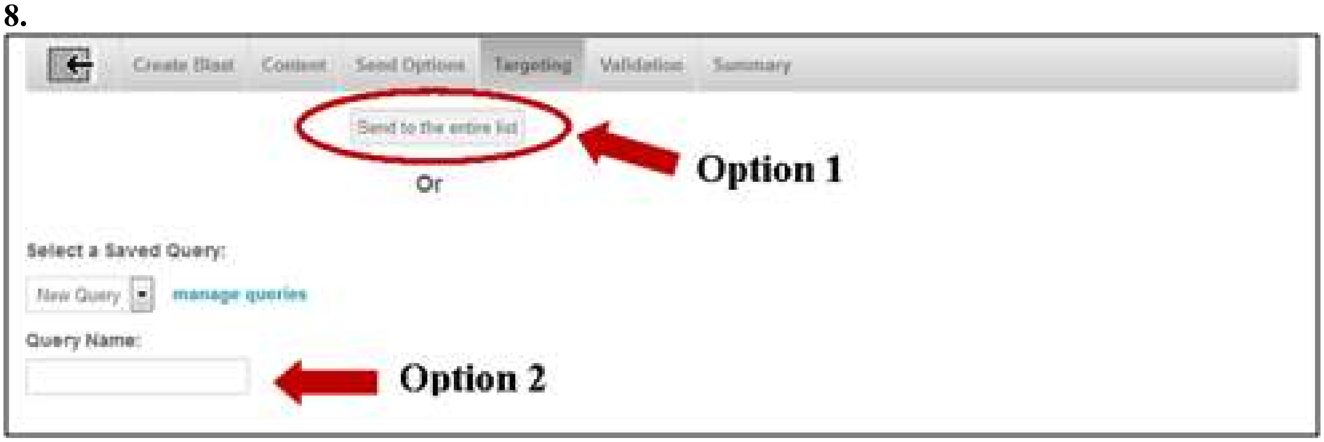

HTML Content
Text Content
Add dynamic content ....
Learn more about using dynamic content.
Source
Style
Format
Normal
Font
Size
Catholic Charities of Saint Louis
This is where you can type the content and information that you would like to send in your email.
save
save & continue
delete


HTML Content
Text Content
We recommend that every email have text content, for recipients who cannot view HTML emails.
Auto-generate Text from HTML
Only send a plain-text message
Just send a Text email, with no HTML content, images, colors, or open/click tracking
Add dynamic content...
Learn more about using dynamic content.
Catholic Charities of Saint Louis
This is where you can type the content and information that you would like to send in your email.

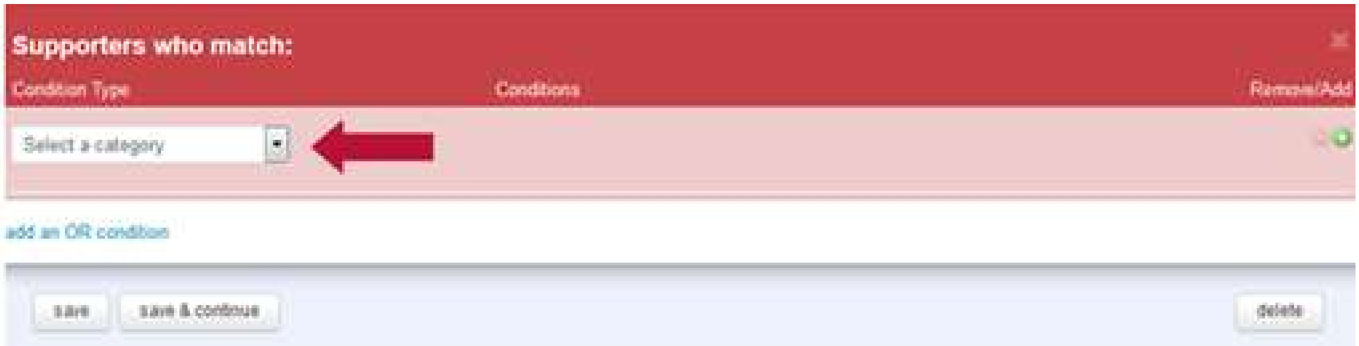
7.


Create Blast
Content
Send Options
Targeting
Validation
Summary
Do not track links
Do not track open rates
Add to web page
save
save & continue
delete

8.


Create Blast
Content
Send Options
Targeting
Validation
Summary
Send to the entire list
Option 1
Or
Select a Saved Query:
New Query
manage queries
Query Name:
Option 2

9.

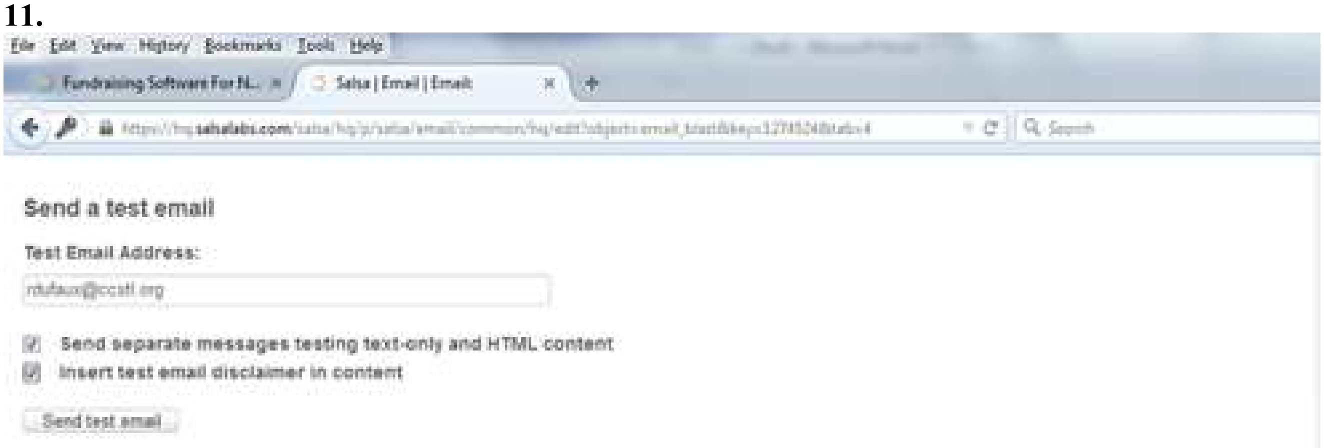


Supporters who match:
Condition Type
Conditions
Remove/Add
Select a category
add an OR condition
save
save & continue
delete

10.

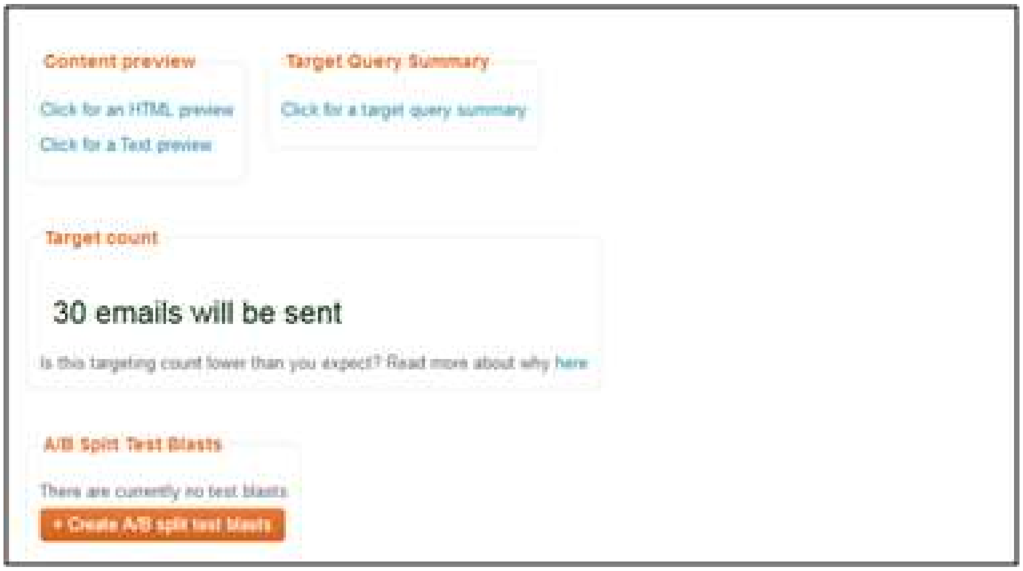
Create Blast
Content
Send Options
Targeting
Validation
Summary
From / Reply-To
More Info
Subject Line
More Info
Unsubscribe Link
More Info
Watch out for red exclamation points

11.

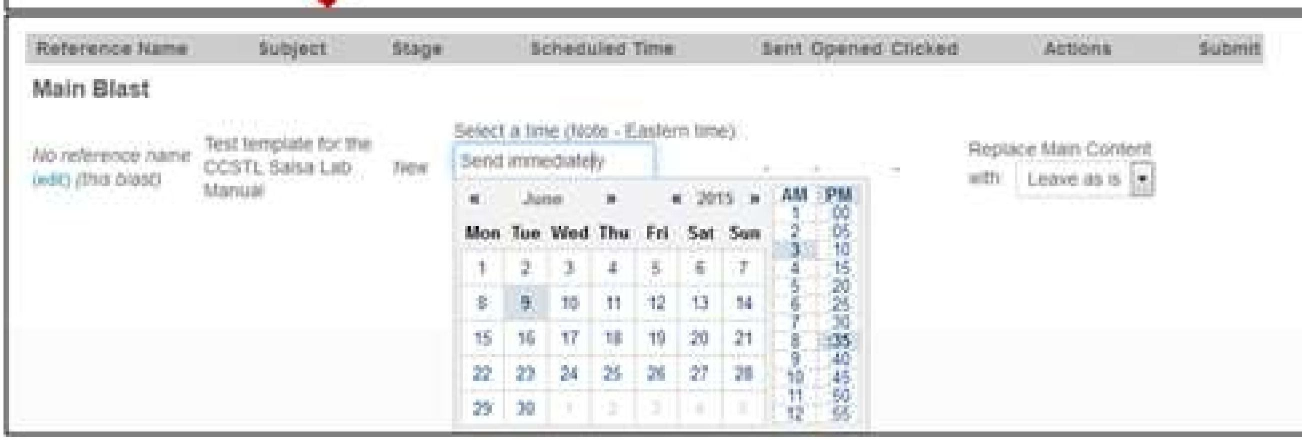


File
Edit
View
History
Bookmarks
Tools
Help
Send a test email
Test Email Address:
Send separate messages testing text-only and HTML content
Insert test email disclaimer in content
Send test email

12.



13.



<u>CREATING AN AUTO-RESPONSE THANK YOU EMAIL</u>

Purpose: To set up an auto-response email thanking sponsors for taking action or donating.

PROCEDURE:

1. To set up an auto-response email, choose the email package under the dashboard.

2. Once you are on the email page, choose the "Create Auto-response" option under the "Auto-responses/Triggers" section.

3. Fill out the configuration page, including the reference name, the type of reply email, and the name and email of the person the response will be sent from. You may also fill out the optional target email, in which you can send the auto-response to an individual email address. Click "save and continue" when done to continue to the content page.

4. Fill in the subject line and then add the content that you would like to include in your auto-response message. You may do this in the HTML Body and Text Body.

HTML Body and Text Body:

This section allows you to compose the content for your auto-response email. This is also the section, in which you can include a social share and encourage supporters to spread the word. Make sure to add any social media links that could be helpful to your supporters.

Some supporters may choose to get plain text emails. In other words, they will not download images or fancy formatting. They just get the plain text. It's important to configure both types. It's better to start with the HTML because it is more advanced.

Compose content.

- You may choose to do this in Google doc or within Salsa
- Avoid Microsoft Word.
  - Word will put the content in weird codes that messes up how the email will be displayed. The code can also get caught in spam traps and then the email cannot be sent.

After completing the HTML Content side, insert the information on the Text Content side.

- You can copy and paste everything OR you can click "auto-generate text from html."

Click save and continue.

5. Fill out the advanced options.

Specify a condition that must be fulfilled to send the email.

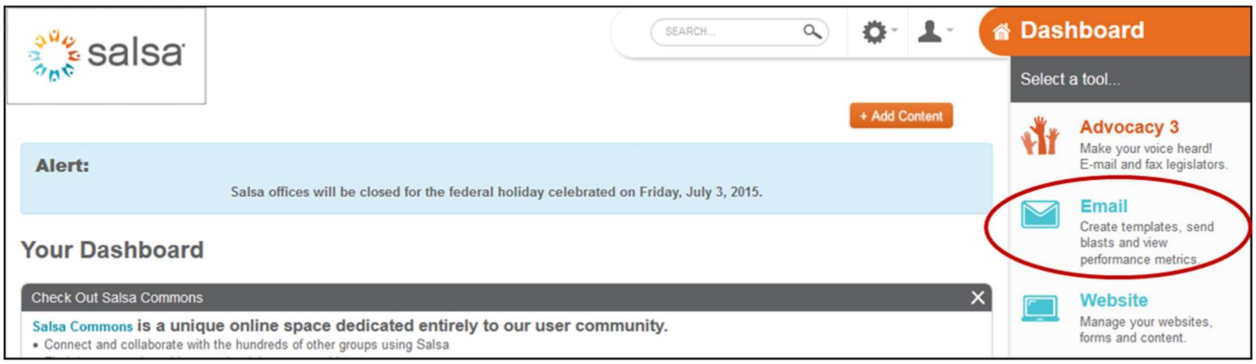
Also, you may want to delay the sending of the auto-response after the supporter submits their form. If so, specify the number of hours to delay sending the response after the form is submitted.

Lastly, for helping debug a page, check the box to append all submitted values to end of the email.

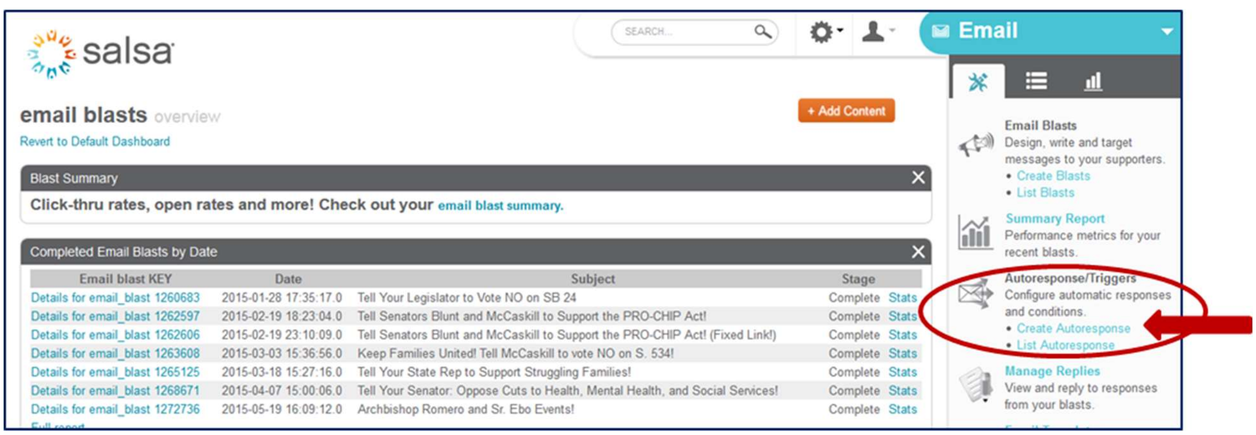
Click save.

6. Now, your auto-response email is set-up. When you set up an action through the advocacy package under the dashboard, you will eventually reach the “follow-up” tab. This tab allows you to assign an email auto-response to be sent once your supporters complete an action. You can choose the email auto-response that you just created by clicking on “add an existing response” option.

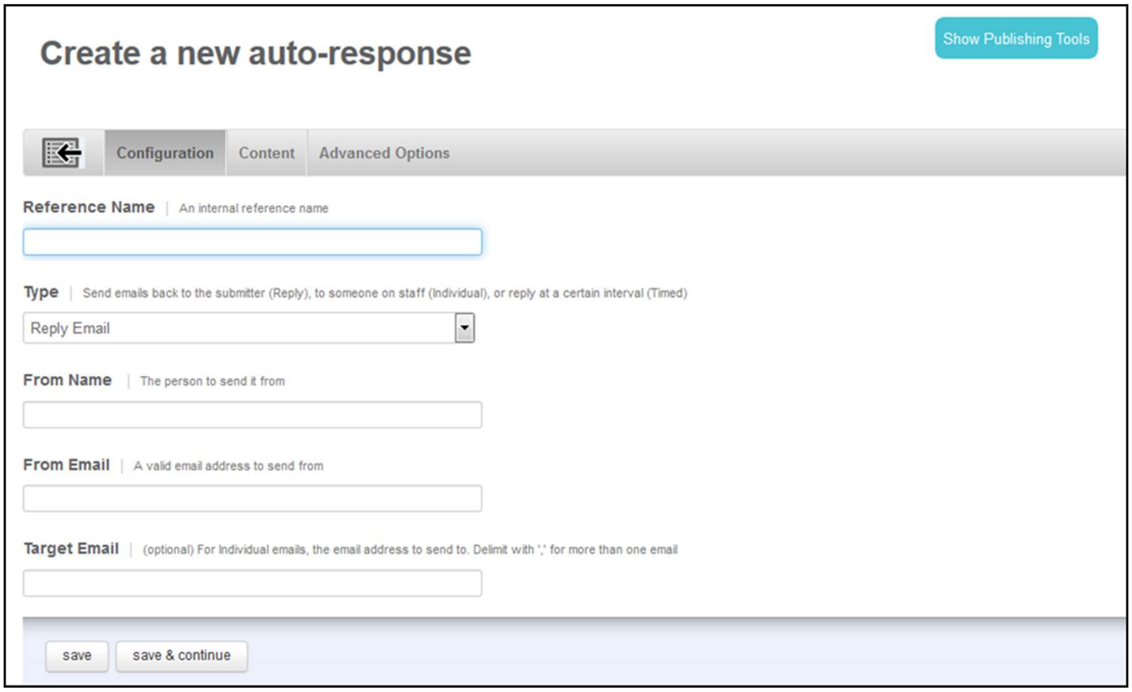
1.



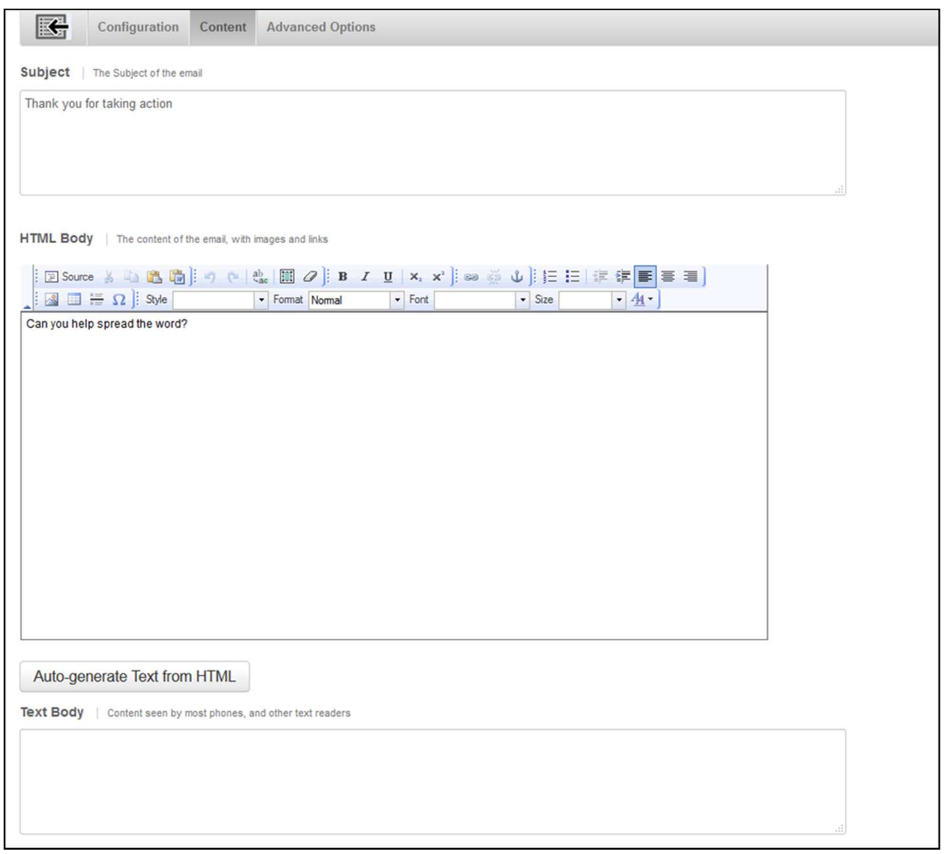
2.



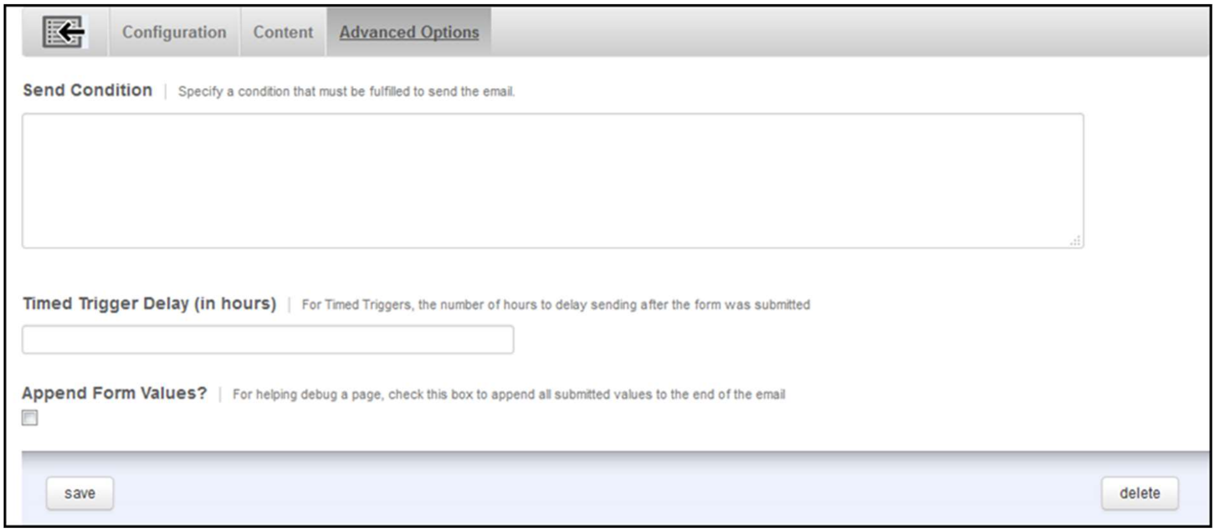
3.


Create a new auto-response
Show Publishing Tools
Configuration
Content
Advanced Options
Reference Name | An internal reference name
Type | Send emails back to the submitter (Reply), to someone on staff (Individual), or reply at a certain interval (Timed)
Reply Email
From Name | The person to send it from
From Email | A valid email address to send from
Target Email | (optional) For Individual emails, the email address to send to. Delimit with ',' for more than one email
save
save & continue

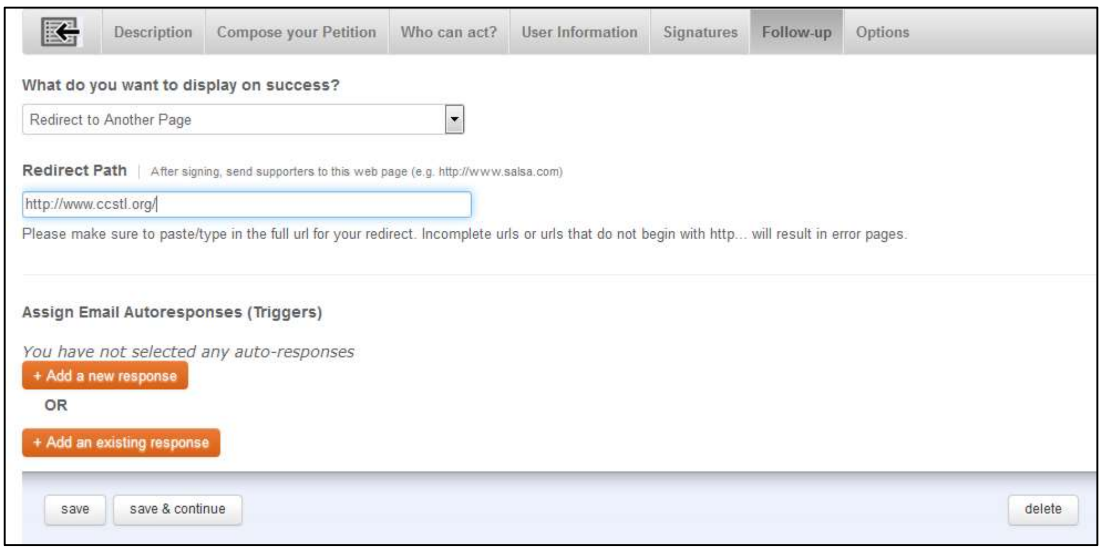
4.


Configuration
Content
Advanced Options
Subject | The Subject of the email
Thank you for taking action
HTML Body | The content of the email, with images and links
Source
Style
Format
Normal
Font
Size
Can you help spread the word?
Auto-generate Text from HTML
Text Body | Content seen by most phones, and other text readers

5.



6.



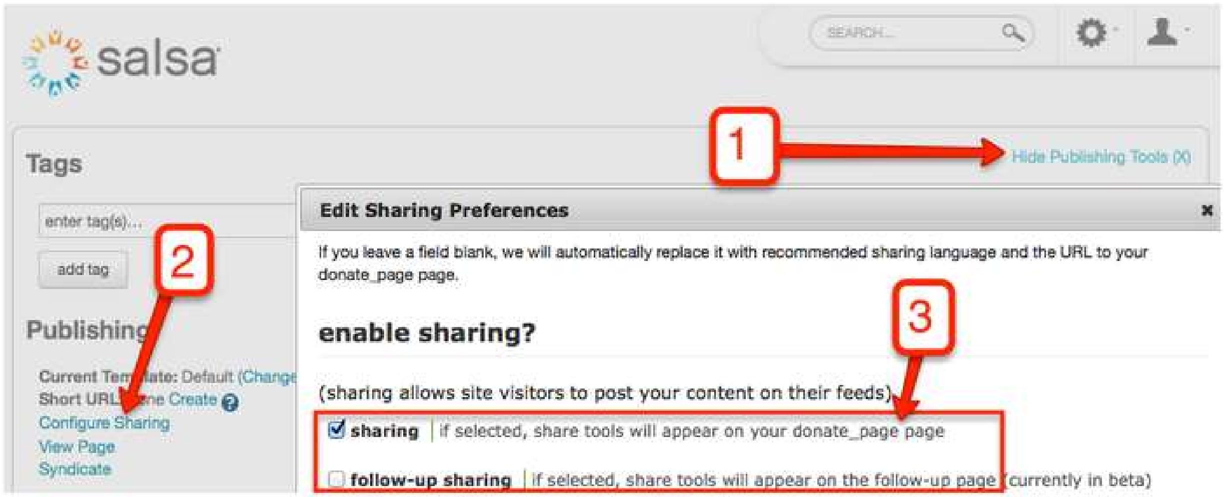
<u>Sharing An Action On Social Media</u>

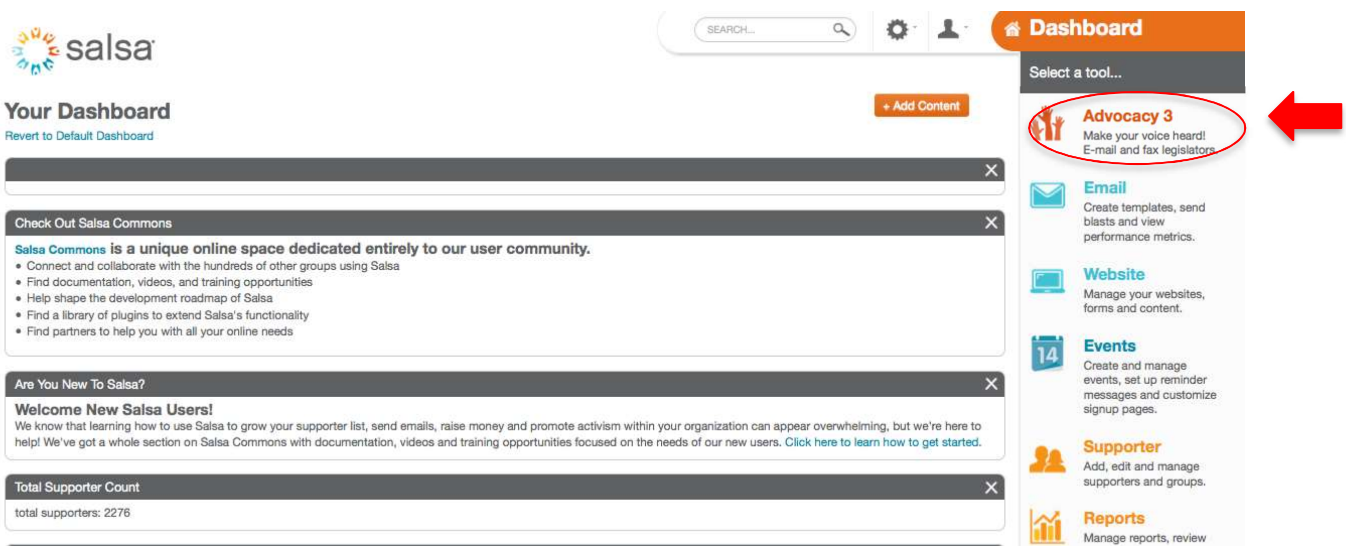
<u>Purpose:</u> Enabling people to share an action they participated on social media will increase awareness and support for the action.

<u>Procedure</u>:

1. Open the existing action template or create a new action template.
2. In the upper right corner, click on 

3. Click on **Configure Sharing**.
4. Make sure the box next to **Sharing** is checked.
5. Under the Message


salsa
SEARCH...
Tags
1
Hide Publishing Tools (X)
enter tag(s)...
add tag
2
Edit Sharing Preferences
If you leave a field blank, we will automatically replace it with recommended sharing language and the URL to your donate_page page.
Publishing
enable sharing?
3
Configure Sharing
View Page
Syndicate
(sharing allows site visitors to post your content on their feeds)
sharing | if selected, share tools will appear on your donate_page page
follow-up sharing | if selected, share tools will appear on the follow-up page (currently in beta)


salsa
SEARCH...
Dashboard
Select a tool...
Your Dashboard
Revert to Default Dashboard
+ Add Content
Advocacy 3
Make your voice heard! E-mail and fax legislators
Check Out Salsa Commons
Salsa Commons is a unique online space dedicated entirely to our user community.
• Connect and collaborate with the hundreds of other groups using Salsa
• Find documentation, videos, and training opportunities
• Help shape the development roadmap of Salsa
• Find a library of plugins to extend Salsa's functionality
• Find partners to help you with all your online needs
Email
Create templates, send blasts and view performance metrics.
Website
Manage your websites, forms and content.
Events
Create and manage events, set up reminder messages and customize signup pages.
Are You New To Salsa?
Welcome New Salsa Users!
We know that learning how to use Salsa to grow your supporter list, send emails, raise money and promote activism within your organization can appear overwhelming, but we're here to help! We've got a whole section on Salsa Commons with documentation, videos and training opportunities focused on the needs of our new users. Click here to learn how to get started.
Supporter
Add, edit and manage supporters and groups.
Total Supporter Count
total supporters: 2276
Reports
Manage reports, review