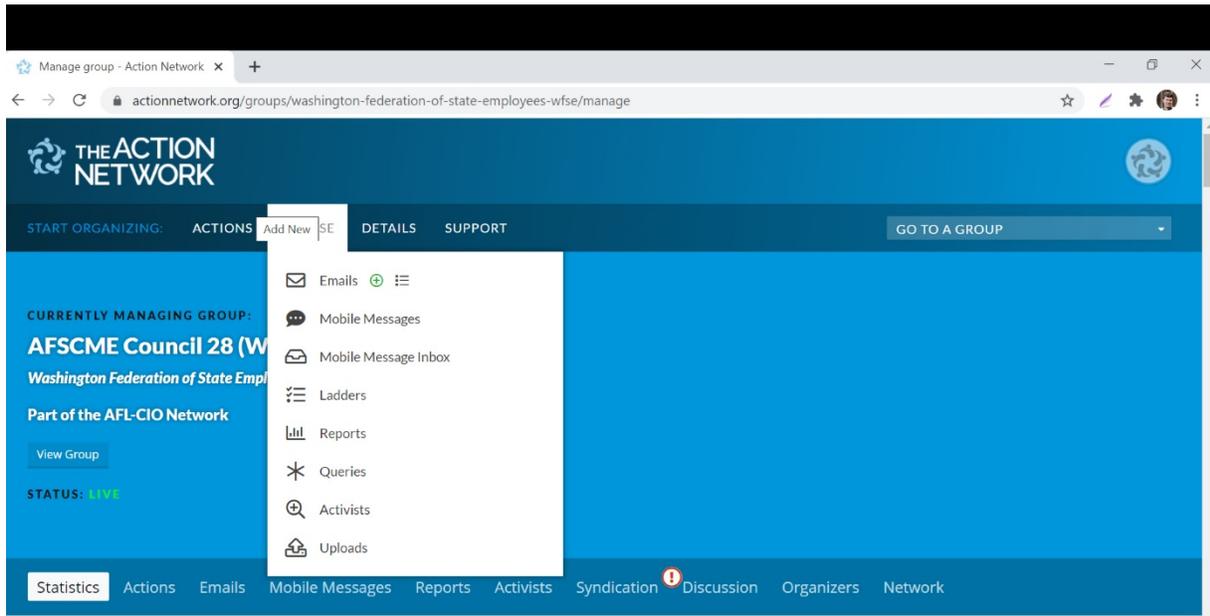


## Action Network Training – Creating an Email

### Step 1 – Create New Email

At the top of the page, click People, scroll down to Emails, and click the + symbol.



### Step 2 – Create Administrative Title

This is the title that WFSE staff will see.

It will allow you to find it amongst all the other emails in Action Network. That is why we use a naming convention in this format: Initials\_Creation Date\_Email Description\_Audience

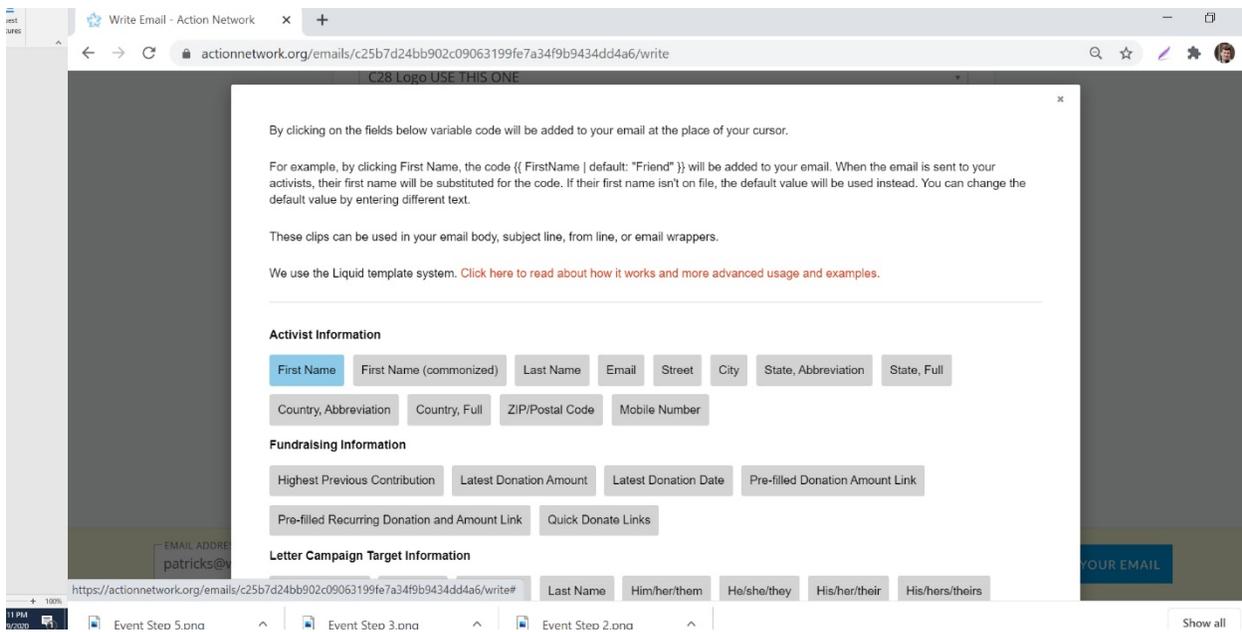
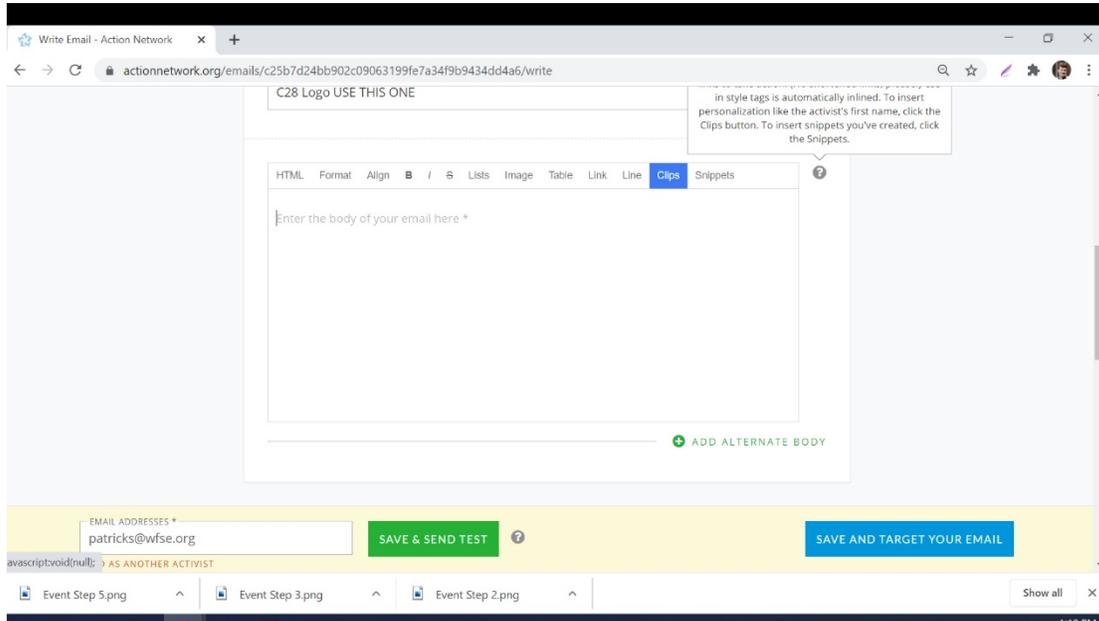
For example: PS 090920 Legislative Appointment Email Tacoma/Vancouver Field Office Members

### Step 3 – Subject Line, From, Reply To, and Preview Text

1. Create Subject Line
2. From – Who is it from? This is usually AFSCME Council 28/WFSE (as a standard) but can be from a Council Rep or member, in which case you would put their name and title.
3. Reply To – This is the email address that will get emails if someone replies to your email. Info @wfse.org is the one monitored by Justin. Comms uses it for all emails we send out and he monitors replies. Feel free to put any address you like here so long as it is monitored.
4. Preview text – Copy and paste the first sentence from your email body and put it here. (Write your email, and then come back to this step)

## Step 4 – Email Body

1. Click Clips, select First Name. This will automatically fill in the recipients first name. Be sure to put a comma after you enter the clip.
2. Write your email, keeping it as short as possible and using bold text and bulleted lists in longer emails.
3. Hit Save and Target Your Email



ALSO USE STEP 5  
FOR:  
REPORTS

## Step 5 – Targeting Your Email

Those who you want to Include in your email are on the left side of this page. Those who you want to Exclude are on the right side. Using this function, you can include or exclude openers of previous emails, recipients of previous emails, people who have signed up for events, and much more.

For most emails, your first step will be choosing the most recent Full List Personal Email or Work Email upload in the Tags section.

### TAGS

The unique identifier for all of our contacts in Action Network is the email address. Therefore we generally have two entries for each member and non-member: one for their personal email address, and one for their work address. We decide which we want to send to, personal or work emails, using tags.

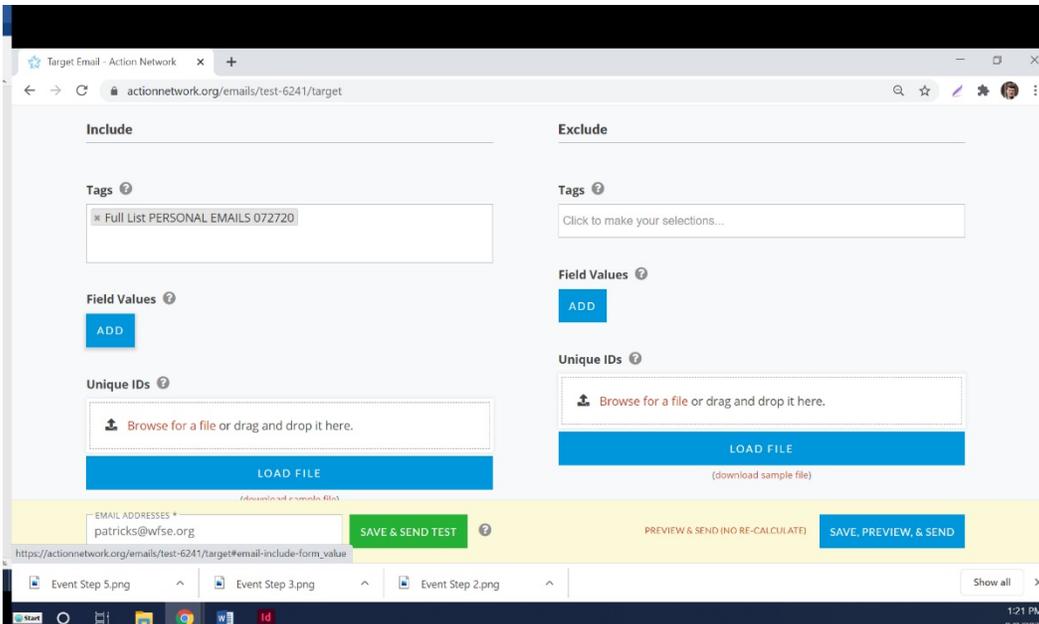
1. Include Tags – Scroll down to the Tags section. Choose the most recent Full List Personal Emails or Full List Work Emails from the Tags section. [Click here to find the most recent tags.](#)
2. Exclude Tags – If you do not want to include Work Emails, go to Tags on the right side of the page and select Work Email. To find it, begin typing Work Email and scroll to the bottom.

These two steps will ensure that from this point on, whoever you target on this page is coming from the most recent data upload from Labor Power.

The screenshot shows the 'Target Email' interface in Action Network. The browser address bar shows 'actionnetwork.org/emails/test-6241/target'. The interface is divided into two main sections: 'Include' on the left and 'Exclude' on the right. Both sections have a list of checkboxes for different targeting criteria, such as 'Target active recurring donors' and 'Target recurring donors with failing donations'. Below these lists are input fields for 'Target donors who gave over \$' and 'in the last' days. The 'Include' section has a dropdown menu open, showing a list of tags including 'Full List (members and nonmembers) 041019', 'Full List PERSONAL EMAILS 070220', 'Full List WORK EMAILS 070220', 'Full List WORK EMAILS 072720' (which is highlighted in blue), 'JW Full List WORK EMAILS 072720', and 'Full List PERSONAL EMAILS 072720'. The 'Exclude' section also has a dropdown menu open, showing tags like 'SM 082120 Pierce County Prosecuting Attorneys Office Updated Work and Personal Emails', 'T Job Class Work Emails 061419', 'TT: AGO non union work email 4.18.19', and 'Timeloss WORK EMAILS 062920'. The 'Work Email' tag is highlighted in blue. At the bottom of the interface, there is a text input field for 'EMAIL ADDRESSES \*' with 'patricks@wifse.org' entered. To the right of this field are three buttons: 'SAVE & SEND TEST', 'PREVIEW & SEND (NO RE-CALCULATE)', and 'SAVE, PREVIEW, & SEND'. The bottom of the browser window shows several open tabs, including 'Event Step 5.png', 'Event Step 3.png', and 'Event Step 2.png'.

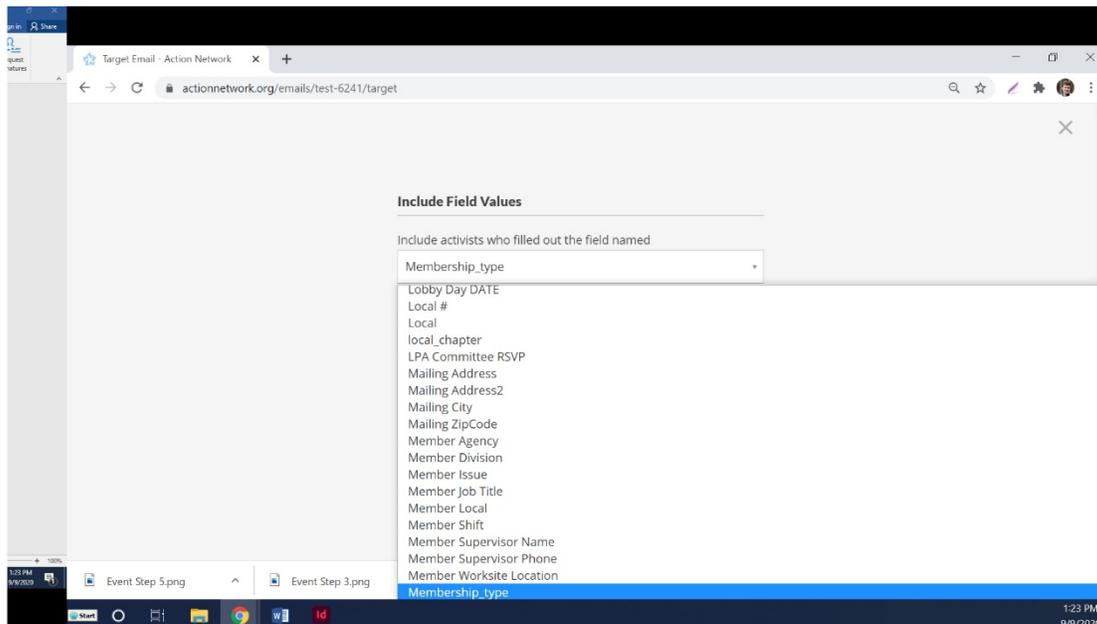
### Field Values

Next, we are going to further narrow our Targeting field using Field Values. To do this we will need to reference the Action Network Key. [Click here to open the current Action Network Key.](#)



1. Click Add underneath Field Values.
2. To target Members only, click the dropdown list and type in Membership\_type. You can just begin typing Membership and it should bring up Membership\_type. Hit enter.
3. Under 'entered a value of,' type M.
4. Click Add.

Now you have targeted all WFSE Members with personal emails on file.



We will now go through targeting by multiple field values using the [Action Network Key](#).

## Targeting by Multiple Field Values

To target using multiple field values, such as members in a certain bargaining unit, members in a certain subagency, etc., we use a Query. Queries should be used in conjunction with the most recent Personal Email or Work Email tag, as described at the beginning of Step 5.

### Queries

Hit save and Create Query

The image shows a side-by-side comparison of the 'Include' and 'Exclude' sections of a query builder interface. Each section contains the following elements from top to bottom: a 'Field Values' section with an 'ADD' button; a 'Unique IDs' section with a file upload area and a 'LOAD FILE' button (with a 'download sample file' link below it); a 'Reports' section with a text input field; a 'Queries' section with a text input field and a 'SAVE & CREATE QUERY' button; and an 'Action Activity' section with a text input field and two numeric input fields for 'at least' and 'in the last' days. In the 'Include' section, the 'SAVE & CREATE QUERY' button is circled in red.

## Naming Your Query

Use the same naming convention for Queries as you do for emails and events so you can find it and use it later. Queries are saved and can be used over and over again. The members that are included in a Query will change as members drop, new members join, and people move worksites, but the Query itself is evergreen in that it will always target who currently fits the criteria of the Query in Action Network.

## Building Your Query

Queries allow you to target people based on multiple field values in the Action Network Key.

The example below is Eastern State Hospital Members. Because it is set to “And” at the top, it is selecting people who have the value of M under Membership\_type and the value C31 under subagency.

Name your query:

QUERY NAME \*  
PS 080220 ESH Members

Queries allow you to chain together Action Network filters using custom groupings of logical AND and OR operators. Saving a query simply saves the filter parameters. Queries can then be included or excluded when building emails or reports to target the results of your query. Query operators are evaluated top to bottom.

AND OR + ADD RULE + ADD GROUP

|                             |                |        |
|-----------------------------|----------------|--------|
| Field Value                 | include        | DELETE |
| field named c28_subagency   | with value C31 | ?      |
| Field Value                 | include        | DELETE |
| field named Membership_type | with value M   | ?      |

SAVE QUERY

The example below targets members and nonmembers at a particular worksite.

Name your query:

QUERY NAME \*  
JL 042120 DCYF at Meeker St

Queries allow you to chain together Action Network filters using custom groupings of logical AND and OR operators. Saving a query simply saves the filter parameters. Queries can then be included or excluded when building emails or reports to target the results of your query. Query operators are evaluated top to bottom.

AND OR + ADD RULE + ADD GROUP

|                                  |                             |        |
|----------------------------------|-----------------------------|--------|
| Field Value                      | include                     | DELETE |
| field named c28_employer         | with value 307              | ?      |
| Field Value                      | include                     | DELETE |
| field named c28_worksite_address | with value 1313 W MEEKER ST | ?      |

SAVE QUERY

The example below targets Natural Resources Policy Committee Delegates.

Name your query:

QUERY NAME \*  
JW 061320 Natural Resources Policy Committee Delegates

Queries allow you to chain together Action Network filters using custom groupings of logical AND and OR operators. Saving a query simply saves the filter parameters. Queries can then be included or excluded when building emails or reports to target the results of your query. Query operators are evaluated top to bottom.

AND OR + ADD RULE + ADD GROUP

|                                      |              |          |
|--------------------------------------|--------------|----------|
| Field Value                          | include      | X DELETE |
| field named c28_policy_group         | with value 9 | ?        |
| Field Value                          | include      | X DELETE |
| field named c28_policy_comm_delegate | with value Y | ?        |

The example below targets all stewards, local presidents, and e-board members.

Name your query:

QUERY NAME \*  
JW 041420 Stewards, Local Officers, E Board

Queries allow you to chain together Action Network filters using custom groupings of logical AND and OR operators. Saving a query simply saves the filter parameters. Queries can then be included or excluded when building emails or reports to target the results of your query. Query operators are evaluated top to bottom.

AND OR + ADD RULE + ADD GROUP

|                                 |              |          |
|---------------------------------|--------------|----------|
| Field Value                     | include      | X DELETE |
| field named c28_steward         | with value Y | ?        |
| Field Value                     | include      | X DELETE |
| field named c28_local_president | with value Y | ?        |
| Field Value                     | include      | X DELETE |
| field named c28_council_eboard  | with value Y | ?        |

The example below targets all stewards in the Spokane field office region.

Name your query:

QUERY NAME \*  
PS 071520 Spokane Field Office Stewards

Queries allow you to chain together Action Network filters using custom groupings of logical AND and OR operators. Saving a query simply saves the filter parameters. Queries can then be included or excluded when building emails or reports to target the results of your query. Query operators are evaluated top to bottom.

The screenshot shows a query builder interface with two rules connected by an AND operator. The first rule is 'Field Value' with operator 'include' and value 'SPOKANE' for field 'c28\_field\_office'. The second rule is 'Field Value' with operator 'include' and value 'Y' for field 'c28\_steward'. There are buttons for '+ ADD RULE', '+ ADD GROUP', and 'X DELETE' for each rule.

## Using Previously Created Queries

You can use previously created queries to save yourself time, but make sure to check and make sure the Query is in fact doing what you want it to be doing. To check how a Query is functioning, go to the top of the page under People, select the bulleted list to see all Queries, find the Query you want to use, and hit manage. This will show you how it is working.

## Step 6 – Send Your Email

Once you have figured out your targeting, hit Save, Preview & Send. This will take you to the Preview & Send page. This page gives you a chance to look over your email one more time, click on any links in the email to make sure they are working, review your targeting, and see how many people will get an email based on your targeting parameters. Always check to make sure the number of people targeted makes sense.

If the number below said something like 20,000 people, I would know that I did something wrong with the Query or otherwise on the targeting page.

## Currently Targeting

Activists on **AFSCME Council 28 (WFSE)'s email list:**

### Include

#### Tags

Full List PERSONAL EMAILS 072720

#### Queries

[47] PS 071520 Spokane Field Office Stewards

### Exclude

#### Tags

Work Email

This email will be sent to **149** activists *(Refresh Targeting)*  
No **random limit** has been set.

AUTOMATE TESTING

SCHEDULE EMAIL

SEND EMAIL

WHAT'S THIS?

If everything looks correct, send your email or schedule it to be sent. Note that the email scheduler thinks we are on the East Coast, so be sure to subtract three hours from what it says on the screen to get local time.

You are done!

## Use Reports to Double Check Targeting

If the number in the targeting section does not look quite right or you want to double check, run a report. To do this, go to the top of the page and hit Report. I suggest opening in a new window so you don't have to find your email again.

The screenshot shows the 'THE ACTION NETWORK' interface. At the top, there is a navigation bar with 'START ORGANIZING:', 'ACTIONS', 'CLOSE', 'DETAILS', and 'SUPPORT'. Below this, there is a 'GO TO A GROUP' dropdown menu. The main content area shows 'AFSCME COUNCIL 28 (WFSE) > MANAGE EMAILS'. On the left, there is an 'Edit Email:' section with 'ADMINISTRATIVE TITLE: PS 081420 Test'. A dropdown menu is open, showing options: 'Emails', 'Mobile Messages', 'Mobile Message Inbox', 'Ladders', 'Reports' (circled in red), 'Queries', 'Activists', and 'Uploads'. Below the dropdown, there is a preview of an email with 'To: Activist Name' and 'Subject: Test Email'.

## Reports

The report page is the same as the targeting page for your email.

1. Fill it out with the same targeting parameters as your email

2. Hit Save and Select Data to choose what kind of data you want on the people fitting your parameters (first name, last name, email, etc.)
3. Hit Save & Get Results. This will show you a list of the people fitting your targeting parameters. You can look at it on this screen, or you can hit Generate Report and a full list will be email to you.

**View Results**

Show 20 -- 1 2 3 4 5 --

| First Name | Last Name  | Email                      | ZIP/Postal Code |
|------------|------------|----------------------------|-----------------|
| Nita       | Holbert    | cnholbert@aol.com          | 99004           |
| Craig      | Walker     | cwalkerfamily@hotmail.com  | 99008           |
| Denis      | Felton     | rangerfelton@yahoo.com     | 99115           |
| William    | Jorden     | JORDENBIL@Aol.com          | 99021           |
| Duane      | Dahlke     | dahlkzoo@nwi.net           | 98843           |
| Elizabeth  | Vasquez    | frel6543@comcast.net       | 99216           |
| Pat        | Hallinan   | pnp_hall@netzero.com       | 99207           |
| Benjamin   | Krantz     | bkrantz@gmail.com          | 99223           |
| Michelle   | Edenso     | damonmichelle@gmail.com    | 99163           |
| Jere       | Jaline     | jere.jaline@yahoo.com      | 99210           |
| Patricia   | Milton     | patriciamilton@hotmail.com | 83814           |
| cole       | chibidakis | cjchidakis@gmail.com       | 99004           |
| Carol      | Baker      | cgbvrc@gmail.com           | 99223           |
| Kay        | Bower      | kaylea.ra@gmail.com        | 99027           |
| Natasha    | Ruddell    | yugony7@gmail.com          | 99202           |
| Gary       | Parrott    | gparrott75@gmail.com       | 99163           |

DOWNLOAD LAST REPORT

No reports have been generated yet. Please generate a new report first using the "Generate" button.

DOWNLOAD

CREATE REPORT CSV

Create a report CSV and have the results with updated data emailed to you when it is ready. To update who this report targets, click "Refresh Targeting" above.

**GENERATE**

**CREATE AN EMAIL BASED ON THIS REPORT**

**SUBSCRIBE ALL ACTIVISTS TO EMAIL LISTS**

**UNSUBSCRIBE ALL ACTIVISTS FROM EMAIL LISTS**

**SUBSCRIBE ALL ACTIVISTS TO MOBILE LISTS**

**UNSUBSCRIBE ALL ACTIVISTS FROM MOBILE LIST**

**ADD TAGS TO ALL ACTIVISTS**

You can also use reports to test Queries.

### Step 13 – Questions?

[Check out the Email how-to guide and video tutorial from Action Network](#) or reach out to the Communications Department at [Comms@wfse.org](mailto:Comms@wfse.org).

We are here to help!