

# **ARISTOTLE ADVOCACY 3.1**

Administrative Experience

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#### Action Center 3.1: Reference Guide for Creating Action Alert

#### Revised: 10/20/2016 to include new functionality

Action Center 3.1 builds upon our version 3.0 deployment when we simplified the overall advocate user experience, regardless of form-factor (Web, Phone or Tablet) so advocates may take action quickly and efficiently.

The Action 3.1 product provides a variety of User Interface improvements, better mobile experience and support for Twitter Advocacy. These improvements are based on inputs from a variety of stakeholders (internal and external), features desired by product management and additional refinements suggested by the development team.

**Browser Compatibility**: Modern websites, such as Action Center 3.1, leveraging responsive design **requires** modern browsers (IE 10+, Chrome, Safari or Firefox).

#### **Overview of Action Center 3.1(Administration)**

AC 3.1 is a Wizard driven solution that consists of four pages requiring user interaction/consideration and a single introduction page offering helpful hints to make creating your alert as efficient as possible.

**Navigation & Button Commands** – Action Center 3.1 supports a Left Hand navigation and bottom navigation that will guide you through working with your Alert.

**Left Hand Navigation Election** – Is designed to conceptually help you understand from a high level what related components you will need to address in each particular stage of the Wizard.

- The navigation elements will cascade to show which specific element need be addressed to successfully complete the top level element.
- Check mark is evident when a particular section has been successfully completed
- Left Hand Navigation is also useful when a user returns to a Saved Alert to edit a specific area within the alert.

**Bottom Navigation** – The bottom navigation element will guide you to the next logical step within the alert Wizard. The left navigation will snap open/closed as you complete each step.

**Button Behavior** – Action Center 3.1 incorporates frequently used commands at the top of the Page. Please note certain buttons change their state based on your selection. For Example: Publish will change its state to Unpublish, once you have set your alert to be live, and provide new options so you may review your Published Alert.

ction Alert	Close Save & Close Save Publish Delete
<u>Close button: C</u> loses alert and returns user to Action Alerts List page. Changes to alert_ <u>will not</u> be maintained <u>Save &amp; Close:</u> Saves all changes to alert and returns user to Action Alert List Page	<b>Publish:</b> Original State of Button reflects unpublished. It w change to Publish when enough information has been add to create a valid and actionable Action Alert. Requires Adn Info, targeting and message to be set to swtich state to active.
Save: Saves changes to your alert. Alert will	Once Published the button navigation will change to reflec
<b>Delete:</b> Alert is deleted permanently. User is returned to Action Alerts list.	

After publishing your alert you will note the button group has changed. Notice that delete and save are no longer provided as <u>you may not edit or delete an alert that is in a Published State</u>. To modify your alert you must unpublish first. Once you have unpublished your alert you may edit and save or delete alert as needed.

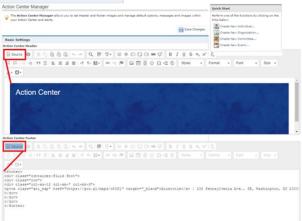
Action Alert	Close	Unpublish	Open Alert -
Open Alert: Provides four options to review your published alert.		Show URL Show IFran	me Code
Show IFrame Code - Provides code you may use to embedd alert within an IFrame		Navigate to	ts Introduction
Navigate to the URL - Navigate to your Action Alert			
Action Alerts Introduction - Takes you to your published list of all Action Alerts within Action Center			

### **Action Center Settings**

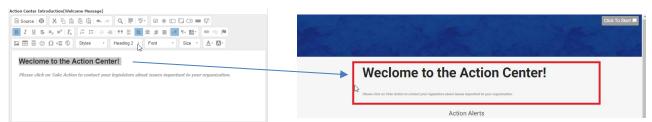
<u>Action Center Setting</u> – Aristotle Advocacy provides the administrative user to centrally manage multiple default settings in Action Center as well as custom Header, Footer and Welcome Message. Areas where default setting may be set include warning messages, Alert Icon and confirmation message.

BOARD FILE SEARCH FUNDRAISING ADVOCACY BILLS AND VOTES LEG. ORG	INIZATIONS ACTIVITIES EVENTS FLY-		SETTINGS HELP AI360 Administration Account Settings
Proceeding with interruption     We are a set of the set of t	Create New Industrial	Perform one of th Inks below: Create New Create New	My User Settings Add/Edit Users User Permissions
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Action Center Footer		All Legislato	Manage Party Abbreviation User Defined Fields Global Transaction Defaults: Pledge Control Advocate Center Manager

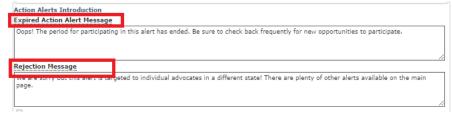
Action Center Header & Footer
– For clients
wishing to express Action Center as a free
standing website you may add your Custom
Header and Footer html code into the
appropriate area. Select Source and place
code. Deselecting Code will show your image.



2. Action Center Introduction (Welcome Message) – Enter your custom welcome message to your Action Center



- **3.** Expired Action Alert Message If you advocate attempts to act on a message that has expired (based on alert end date) your custom message will appear.
- Rejection Message Some messages are targeted to specific advocates. For example: An alert is targeted to Virginia Legislators and a Maryland Advocate attempts to take action they will receive your custom Rejection Message.

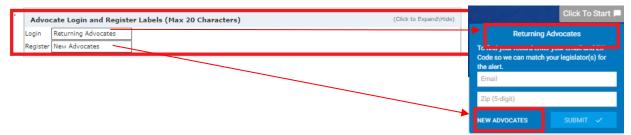


5. Search For Me Text workflow – You may provide custom text that provides guidance to your advocates on how to find their record or for new participants on how to find their legislators. This will after advocates select the Click to Start Button.

Varified Vatar	Click To Start
Search For Me Text workflow To find your record enter your email and ZIP Code so we can match your legislator(s) for the alert.	Peturning Advocates To find your model and the your email and ZP Code to we can match your legislato(c) for the slate.
Alex Team Select an image for the action alert or upload a new image. Maximum file size is 20mb.	Weclome to the Action Center!
Select an image for the action alert or upload a new image. Maximum file size is zumo.           Image         Select	NEW ADVOCATES SUBMIT 🗸
	Please click on Take Action to contact your legislators about issues important to your organization.

- 6. Alert Icon You may upload and display default icons for your Action Alert. Remember you can override this preference during the Alert Setup process.
- 7. Update Personal Information You may enable your advocates to update their information to Aristotle 360 by selecting this option. Any modifications captured on the Action Center. Once logged in they may select the Button (displaying Advocates first name) and may update their address and other contact information.
- 8. No Alerts Active Message You may display a custom message notifying your advocates that there are no active alerts available.
- 9. Confirmation Message General text that will be include in your confirmation page once your advocate has taken the intended action. Additional information will be include regarding the alert they participated in, Legislators they have contacted and the method of contact.
- Confirmation Email Setup your confirmation email which will serve as their participation "Receipt". Aristotle 360 will fill in the details portion automaticall with alert name, legislator(s) contacted, Method of Contact etc.
  - a. Confirmation Email Subject Subject Line of Email

- **b.** Confirmation Email Body Header Header portion of the email. (Precedes autogenerated details of their activity).
- c. **Confirmation Email Gody Footer** Footer portion of the email (Follows auto-generated details of their activity).
- **11.** Advocate Login and Register Labels You can provide custom labels for the Login and Register section! Remember that there is a twenty (20) characters limit for the labels.



Also – these labels will be incorporated automatically in some warning messages! So craft you labels with the warning in mind. The convention is as follows: "You need to select [Login Label] or [Register] to participate in the alert"

	Returning Advocates
	To find your record enter your email and ZIP Code so we can match your legislator(s) for the alert.
	Email
/ou need to select Returning Advocates or New Advocates to participate in the alert	Zip (5-digit)
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acussing Joint Employer Concerns	0 4

## Introduction to Functional Areas -ADMIN

- 1. Introduction Tips for setting up your alert.
- 2. Admin Information You will set Administrative Elements of your Alert
  - a. Title to Display to Your Advocates
  - b. Internal Action Alert Name
  - c. Message to be Displayed to Your Advocates HTML Editor that will publish at the top of your Alert. This is displayed on the alert for your <u>Advocates</u>!
  - d. Publish Duration Period where Alert will be available for action.
  - e. Delivery Medium Administrator will determine the method the advocacy message will be sent to the Legislator recipient.
    - i. Email/Web Form Traditional message e-delivery of advocate message to legislator.
    - ii. Phone Advocates will call legislator(s) and enter their call notes
    - iii. Twitter (NEW) Tweet(s) will be sent to Legislator's twitter handle
    - iv. Fax Delivery of advocate message via fax
  - f. **Issue** This will permit webform mapping to a corresponding issue on a Legislator's webform.
    - i. Note: User will no longer have to set each legislators' webform
  - *g.* Advocacy Model (NEW) Aristotle supports Standard Advocacy & Franchise Advocacy. See End of Document to learn more about this functionality
    - i. <u>Standard</u> Legislator targets are based on Advocate's home or business address.
    - ii. <u>Franchise</u> Legislator targets are based on Advocate's linked organization(s) address.
      - 1. Address Preference will be disabled by design
      - 2. **Members Only is enforced** as the application must know the advocate wishing to participate. *Note: If Publish Scope is changed to "All" Advocacy Model will change to Standard Model.*
      - Individual's must be linked to Organization within the <u>District</u> <u>Information, Relationships & Voting History Panel</u>. The individual and Organization must be linked as follows:
        - a. Individual is Franchisor to Organization related as Franchise
    - iii. <u>Mixed</u> Will return legislator targets using both the Standard & Franchise model. Individual will be presented recipient targets based on Address Preference (Zip-to-District relationships) and Linked Organization(s) related Legislators.

- h. Advocate Address Preference –Determines address to which your advocate's Legislators will be matched based on selected address.
- i. Publish Scope
  - i. All Alert may be acted upon by any website visitor who enters required information necessary to match them to their legislator.
  - ii. Members Only Any authenticated users may participate
    - 1. For Franchise Advocacy this will be set by default
  - iii. Internal Alert is accessible only via a link sent to users who are authenticated
- j. Show/Hide Navigation Button to Return to Alert List **(NEW)** Use when the alert is setup as the Primary intended action for advocates and Administrator does not desire for users to navigate back to full Action Alert List page.



Sponsor the Breast Cancer Patient Education Act

- i. Show Set as Default will display Additional Alerts link
- ii. Hide -Additional Alerts link will not be displayed
- Targeting Set your targeting criteria for the alert. Aristotle permits you to associate a Bill, based on jurisdiction for <u>automatic Thank You messaging</u>. This will send an alternative Thank You message to legislators supporting your Bill. You may set Legislative Committee based on jurisdiction as well.
  - a. <u>Jurisdiction</u> Set Top Level Target: Federal/State or Custom may be selected.
  - b. <u>Chamber</u> Each Chamber (House and/or Senate) will dictate Bill and Legislative Committee availability.
    - i. Federal
      - House You may restrict by Legislative Committee and enforce Thank You Letter Based on Bill support.
      - 2. Senate
      - 3. White House
    - ii. State
      - 1. House
      - 2. Senate
      - 3. Governor
    - iii. Custom
      - 1. List
      - 2. Query

- 3. Individual A Specific Individual may be target that may reflect a *"Custom Legislator"* or other individual you would like to target.
- c. Settings You can manage
  - i. Targeting Type Governs how the targets are expressed within the action alert.
    - Supporter Legislators Only <u>Recommended based on Congressional</u> <u>Preference</u>. Targets legislators that maintain a constituent relationship based on advocate address.
    - All Legislators in Target List Advocates would be sending to ALL legislators regardless of their constituency. Not-Recommend as Legislator office may consider non-constituent communications "Spam" and may lead to advocate fatigue when taking action.
  - ii. Target Treatment provides the flexibility of treating legislator targets in a specific manner.
    - 1. No Splitting of Targets
    - 2. Exclude Targets You can exclude specific legislators from an alert
    - 3. Split Target For Separate Messages provides the ability to create two distinct lists where List 1 may have multiple carousel letters and List 2 a single letter.
- 4. **Messages** Message creation portion of the Wizard that permit you to customize message handling by advocates, create carousel letters and thank you letters
  - a. Settings provides Admin the ability to expose edit abilities to certain aspects of the message
    - i. Edit Introduction
    - ii. Subject
    - iii. Message
    - iv. Conclusion
    - v. Signature Type Currently support only User Name but future enhancements to include User Name and organization are envisioned.
  - b. Chamber
    - i. Each Chamber may incorporate up to Five (5) Carousel Messages and One(1) Thank You Message (Based on Bill set in targeting OR Split Target).
    - ii. Message Recycle Bin Delete message(s) are sent to the Message Recycle Bin where they may be "rescued" by clicking the message icon.
- Advanced Option Advanced Options permit the user to set options for the alert including overriding global settings set in Action Center Manager (where you may set global Icons, messages, thank you.
  - a. General
    - i. Verified Voter (Optional) -For users leveraging Aristotle Verified Voter option where each alert is certified that advocate is a registered voter where noted within our Nationwide Voter database

- ii. **Personal Info Update (Optional)** permits advocates ability to update their information when taking action
- iii. Expired Message (Optional) Overrides text set in Action Center Manager
- iv. Rejection Message (Optional) Overrides text set in Action Center Manager
- v. Thank You Notes (Optional) Overrides text set in Action Center Manager
- **b.** Media Options You can apply custom Icons specific to an alert (override global Icon), embed a video or set an Image for your take action page..
  - i. Choose an Icon For the Action Alert You may upload and Icon (2 MB) and apply to specific Action Alert
  - Embed a Video Support YouTube video which will display on your alert AND will be included when alert is Shared via Twitter. If a static Image is selected a video option will not be available.
  - iii. Choose an image For Take Action Page instead of a video, users may choose to include an infographic or static image to display at the top of the Action Alert. If Video is chosen, this option is not available.
- c. **Social Media (Optional)** Provide your Advocates the option to virally share your Alert to their social media networks. Social Sharing is available after Advocates have taken action and displays on the Confirmation/Thank You Page.
  - i. Facebook Share Alert to Advocates Facebook Page
  - ii. Twitter Share Alert to advocates via Twitter

#### Search for an Alert

- 1. Navigate to Advocacy ->Action Alerts
- Search Box –Enter a Keyword present within the "Internal Action Alert Name"
  - a. The complete list of Alert is shown by default
  - b. As you type the list will be reduced
- 3. A list of Alerts meeting your keyword search will be presented

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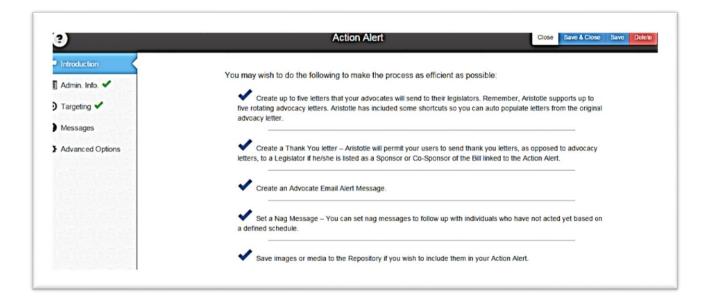
Create a New Alert – New Alerts may be created from the Advocacy menu or within the Alert Display grid.

- 1. Navigate to Advocacy ->Select "Add Action Alert" from top of Advocacy Menu
- 2. From Action Alert Display Grid -> Select "New Action Alert"

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# Creating an Alert in AC 3.1

**Introduction:** Some tips you may wish to consider. This page will not display after you have saved your alert.



### Admin Info

- <u>Admin Information</u>: The Admin Information page creates the basic parameters of the Action Alert that include internal/external alert name, description, publish duration, delivery medium, Issue, Advocate Address Preference and Publish Scope.
  - a. Title to Display to Your Advocates
  - b. Internal Action Alert Name
  - c. Message to be Displayed to Your Advocates HTML Editor that will publish within your Alert
  - d. Publish Duration (start and end date)
  - e. Issue This will permit webform mapping to a corresponding issue on a Legislator's webform.
    - i. Note: User will no longer have to set each legislator's webworm
  - f. Advocate Address Preference Home or Business address from which Legislator's will be matched.
  - g. Publish Scope

- i. All Alert may be acted upon by any visitor to the website
- ii. Members Only Any <u>authenticated</u> users may participate
- iii. Internal Alert is accessible only via a link sent to users
- h. Show/Hide Navigation Button to Return to Alert List
  - i. Show "Additional Alerts" navigation link to permit users to access Alert List page
  - ii. Hide Navigation link "Additional Alerts" is hidden and user may only take action on current page.

https://staging-ai360.aristotle.com/Advocary	//ActionAlert/Inder/Tid=ba21fcd8-29d3-4319-ac20-22498b18clf9	M
0	Action Alert	Close Save & Close Save Publish Criefs
Introduction	The To Chapter To Your Advancement Appears on Published Alert (Advocate Facing).	
Admin. Into 🕜	Sponsor the Breast Cancer Patient Education Act	
Targeting 🛩	Internal Action Automations Reference Name by Mass Email Activity Wizard (Internal Name)	
Messages 🖌	Breast Cancer Patient Awareness	
Advanced Options 🛩	Message to the Departured to their Advancess. IntroductoryText displayed on Alert Intro and Alert	
Advanced Options		
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	This bit will folder greater public assements to women poor surgery so they can better heat and entrance ther post-cancer lives.	
	berly	
	num Duration Alert May Be Acted Upon	
	1/1/2016 12/31/2017	
	Medium advocates message will communicated to recipient	
	Delivery Medium advocates message will communicated to recipient	
	Issue passed to Legislator web form	
	Heath	
	Advocacy Model - Standard, Franchise or Mix	
	Standard * Home * Al * Address Preference - Addressed to be used to match legislator	s)
	Publish Scope - Govern who may see your alert and take action	
	Show •	
	Publish Scope - Hide "Additional Alerts" link that permits advocates to leave Active alert and go to Alert List Page	
******		•
< Introduction		Jurisdiction >

After required fields have been entered you will be ready to set up your Target

Select "Jurisdiction" using bottom navigation.

# Targeting

**2.** <u>Targeting</u> – Set your targeting criteria for the alert by selecting a single jurisdiction and then chamber when available.

- <u>Jurisdiction</u> The targeting criteria consist of a <u>single Jurisdiction</u> that would reflect Federal, State or Custom. Based on your Jurisdiction the system will present you with jurisdiction specific options.
  - *a.* Federal or State Alerts Example reflects a Federal Senate Target with Bill and Committee selected
    - i. Jurisdiction = <u>Federal</u>

O Targeting ✓	-v
Jurisdiction	Federal
Federal 🖌	
Settings 🛩	State
9 Messages 🛩	
🌣 Advanced Options 🛩	Custom

 Select Senate By clicking "Senate" -> Check "All States ->Bill (type Bill Number or Keyword for a Bill ->Committee (Type Keyword or Committee name for a list of available committee *associated to the Chamber*)

House Senate White House	
All States	
$_{ m III \odot}$ Typing "Cancer" returns any Senate Bill containing Keyword. Or enter Bill Number and Bill will appear	
S 1192: Breast Cancer Patient Education Act of 2015	×
ommittee 💿 Typing "Health" will return all Committees with Health in Name	
× Senate Committee on Health, Education, Labor, and Pensions	

- b. Custom Instead of using a Federal or State jurisdiction the user may use a custom target based on a List, a stored Query or a specific Individual (such as a custom advocacy target or local legislator created by user).
  - i. List User may select a stored list by typing at least three characters of the list name or key word contained within the List
  - **ii. Query** A stored query may be used to target your alert. User may select a stored query by typing at least three characters of the stored query name or key word contained within the name of the query.
  - **iii.** Individual A single individual target may be defined by typing at least three characters contained within the name.

	Action Alert Close Save & Close Save De	elete
	Custom	_
	List	
	Local Leg List Chicago City council 🗙 🔻	
Type a minimum of Three characters to return stored List or Queries. For	Query	
"Individuals" type three letters to return valid Name stored within 360.	Search for a Query	
	Individual	
	Search for an Individual	

- c. <u>Settings</u> The final step for creating your target is to invoke any target settings. Here you may set the scope of the alert based on your Jurisdiction and Chamber as well as how the target is treated within the context of the messages to be sent by your advocates.
  - i. **Targeting Type** –Enforces "Constituency" between Legislators and Advocates
    - a) <u>Supporter Legislators Only</u> Recommended. Targets legislators that maintain a constituent relationship based on advocate address
    - b) <u>All Legislators in Target List</u> Advocates would be sending to ALL legislators regardless of their constituency. Not-Recommend as Legislator office may consider non-constituent communications "Spam" and may lead to advocate fatigue when taking action.

Admin, Info. 🖌	Targeting Type	Supporter Legislators Only Supporter Legislators Only
Targeting 🖌	Target Treatment	All Legislars in Target List
Jurisdiction 🖌		
Custom Target 🖌		

- ii. **Target Treatment** provides the flexibility of treating legislator targets in a specific manner.
  - a) <u>No Splitting of Targets</u>- Set by Default. Will permit Carousel Messages to be sent including Bill driven Thank You messages.
  - b) Exclude Targets You can exclude specific legislators from an alert

c) <u>Split Target For Separate Messages</u> – provides the ability to create two distinct lists where List 1 may have multiple carousel letters and List 2 a single letter.

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Admin. Info. 🖌			
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Custom Target 🖌			
Custom Target 🖌			

After Completing the Targeting phase you are ready to create your sample <u>message(s</u>) for your advocates to send.

**Click Message Settings from Bottom Navigation** 

### Message

3. <u>Messages</u> – When creating your message(s), both advocacy and thank you, you will need to first determine if the user may edit portions of the message and then develop the actual message that will be sent to the legislator(s) based on your previously defined target.

<u>Note</u>:

- **Carousel Message = ADVOCACY** message that your advocates may send to your target recipients (Legislators). You may create 1 to 5 distinct messages
- **Thank You Message = A Single Message** that thanks a <u>Legislator</u> for supporting a bill. *These* <u>do not</u> represent messages being sent to your advocates for participating in the alert!

<u>Message one will set the Introduction, Subject and Conclusion for All Carousel messages as Administrators</u> <u>typically prefer that these remain the same in order to transmit the specific intent of the advocacy message</u> <u>across all communications</u>. You may wish to provide your advocates the ability to change the suggested content in particular areas which is supported within AC 3.1.

> a. <u>Settings</u> – You may permit your activists to edit specific areas of the advocacy message. By default these values are set to <u>Non Editable</u>.

FOR PHONE ADVOCACY: MESSAGE EDITABLE (NUMBER 3) ENABLES "TALKING POINTS" FOR YOUR PHONE CAMPAIGNS. SELECT "EDITABLE WITH TALKING POINTS TO DISPLAY TALKING POINTS WORKFLOW.

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🏠 Advanced Options 🖌	Talking Points This bill will foster greater public awareness to women post se embrace their post-cancer lives.	urgery so they can further heal and	(4) The second s	
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<u>Message Creation</u> – AC 3.1 supports multiple advocacy messages and Tweets per legislative Chamber. This reflects five (5) carousel advocacy messages & Tweets, and one (1) Thank You message & Tweet. For *Split Targets* ~ Target List 1 may support up to five (5) carousel messages and List 2 will receive one (1) message.

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sduction un. Into.	Carousel Messages No Carousel Messages available.	Add	Thank You Message Continue your g	20
isagos ne sate •	Message is being created for th	is recipient Chamber.		Button state will change when valid message(s) have been created and other required elements have been added.
anced Options 🛩	💓 Twitter Advocacy		y Twilter Thank You	
	Help women achL	Add	Thank you for y	
	Ş			

NOTE: Process for creating an Advocacy Messages, Thank You Message and Tweet(s) are the same.

8	Action Alert	Ciste Save & Clas
Introduction		
Admin. Into. 🛩	Carousol Messages	Thank You Message
Targeting 🛩	Subject N	Continue your g
Messages 🖌	Support the Breast Cancer Awareness Act!	
Setings 🖌	http://doi.org/	
House #	Please Support S 1192 to help inform pomen of alternatives available to	
Senate 🖌	them post surgery. This bill will faster greater public awareness to	
Advanced Options 🖋	This bill will foster greater public awareness to women post surgery so	
	they can further heat and embrace their post-cancer lives.	Click and drag to expand Text Box
	Lappreciate your consideration and look forward to seeing you join other	expand text box
	Member in supporting this important legislation	32 32
	Add	
	Message Recycle Bin	
	y Twites Advocacy	y Teatler I hank You
	Help women achi 📃 🔳	Thank you for y.
	Add	

- i. Click Add beneath Carousel Message to begin message creation
- ii. Enter Subject, Introduction, Message and Conclusion and <u>Save</u> Message 1
  - 1. <u>Message 1</u> will set Subject, Introduction & Conclusion For Message 2-5
    - 2. Create Another Message? Two ways to add subsequent message(s)
      - a. Click "Add" to being creating Message Body for Letter 2 from "scratch";
      - b. Click icon (shown below) to "Clone" Message 1 and then tailor for message 2.

Action water - doogle chrome						~ ^
https://ai360.aristotle.com/Advocad	cy/ActionAlert/Index?id=0e9baaf4-15	7c-4b4d-8023-9041ebac9c97				
•			Action Alert		Close Save & Close Save Pt	blish Delete
Introduction						
🔳 Admin. Info. ✔		Carousel Messages		Thank You Message		
🗿 Targeting 🖌		This bill will		Continue your g		
🛛 Messages 🖌		Meseage	×H			
Settings 🗸		This bill will foster greater public awareness to can further heal and embrace their post-cance		Clone or Copy Message		
House V						
Advanced Options 🗸	2	Message Recycle Bin				
		Measage Resyste on				
		Twiller Advocacy		🈏 Twitter Thank You		
		Help women achi	III - 1	Thank you for y		
			Add			
Message Settings					Senate T	Freatment >

Alert is Ready to Publish and Be Acted Upon

Once you have saved your messages you may publish or navigate to "General Options" to apply special handling to this specific action alert

# **Advanced Options**

- 4. <u>Advanced Options</u> Permits the administrator to apply optional treatments to a specific alert and/or override defaults set within *Action Center Setting*.
  - a) <u>General Options</u> You can set custom messages and implement additional controls/features that will be applied to your alert.
    - Verified Voter Aristotle provides the ability to certify your advocate is a registered voter by passing the individual against our nationwide voter database. This provides your legislative targets with additional verification that the individual communicating is in fact a real person and not "spam".
    - Personal Info Update You can change the default setting (set in Action Center Settings, for a particular alert to permit or prevent advocates from updating their personal information.
    - 3. Rejection Message Administrator can set a custom rejection message for the alert that was set in Action Center Settings. Rejection Message provides a message to an advocate that was included in an alert but his legislator may not be a target so he/she would be unable to participate.
    - Thank You Notes Display a custom Thank You Message display to your ADVOCATE after they have taken action. Overrides any default set in Action Center Settings.
    - 5. Advocate Lookup Advocate Look Up Text will override any default set in Action Center Settings.
    - 6. Advocate Lookup: Instructions Overrides default set in Action Center Settings.

Action Hiert - Google Childre	ت ١
https://ai360.aristotle.com/Advocacy/ActionAler	/index?tid=De9baar4-157c-4b4d-8023-9041ebac9c97
0	Action Alert Case Swe & Class Swe Paddah Debits
Introduction	
🔟 Admin. Info. 🛹	Choose an icon for the Action Alert
	Upload Files Choose from Existing Icons You may change your default Icon to one stored in the Icon library or upload a new one (2mb)
9 Messages 🛩	Select an icon to be shown next to the alert in the list of published alerts.
Advanced Options 🖌	
General Options 🗹	® Embed a Video
Video & Images 🖌	URL: https://youtubeP065gxWmKQs You may add a YouTube video. Copy the URL into the field provided. Note - Twitter sharing will include this
Social Media 🖋	video
Confirmation 🛩	
6	
-0	
	Video to be embed in the alert page. Format expected : http://www.youtube.com/vM/98NoNPFKCBI
	Choose an image For Take Action Page
	Uprov Frees Choose from Existing Images Choose from Existing Images Vou may include a static image such as an infographic to display instead of a video
	Image to be embed in the alert page.
10	Social Media >
General Options	Social Media >

If you are satisfied with your General Options you may select "Video & Images"

- b. <u>Video & Images</u> You set a specific icon for your alert or Action Center, overriding the default icon. You may also embed a video within your alert.
  - a. Choose an Icon for the Action Alert
    - *i.* You may use the default icon, default is set in Action Center Settings, that is displayed
    - ii. You may select from the Icon Library of previously uploaded Icon
      - 1. Click "Choose from Existing Icons
      - 2. Click image from library
      - 3. Confirm Selection
      - 4. Image selected will appear next to "Choose from Existing Icons"

0	r	Act	ion Alort		-	
Introduction	Upload File	Upload new icons Select Upload Fil and Select File.	les -> Choose Directory		1	
🗐 Admin. Info. 🛩						
⊙ Targeting ✓	Restrictions				_	
O Messages ✓	File Size Limit: 2 MB Accepted File Extensi	is: jpg, jpeg, png file		✓ 4y Search Icon		
Advanced Options	Choose Tile No file	organize •	New folder	•   • j    Search Ron	E) • [	2 ] 0
General Options 🖋		A Stavorites				
Video & Images		Desktop			1	
Social Media 🖋	-	2 Recent P		CapArena Cla		
Conf. Settings		- 🥽 Libraries	autocacy_cannel	Capitelia Cia		Select a file to preview.
		Documer	nts			
		Pictures	MAN			
S PERMIT		a videos	*			
			File name:	- All Files	-	-
	Video to be embe Format expected	in the alert page. http://www.youtube.g		Open	Can	ncel

- iii. You may upload a new icon and select to make active
- b. Embed a Video You may include a video within your action alert to add additional punch to your Action Alert
  - i. Simply enter in the URL and the video will be called into your action alert
- c. Choose an Image For Take Action Page
  - *i.* You may select from the Image Library of previously uploaded Images
    - 1. Click "Choose from Existing Images
    - 2. Click image from library
    - 3. Confirm Selection
    - 4. Image selected will appear next to "Choose from Existing Icons"

When satisfied with your Selection Click "Social Media"

# Social Media

- c. <u>Social Media</u> AC 3.1 provides your advocates to share your alert through social sharing using Facebook and Twitter. Facebook Note: Facebook is implemented as a back-end setting. To setup this functionality you will need to contact your account manager to implement. There is no cost for this service.
  - 1. <u>Facebook</u>
    - a. Allow To Publish Alert on Facebook Checking this option makes the action alert available on Facebook when the alert is published
    - b. Facebook user can take action within Facebook.
    - c. Allow Posts on Facebook Checking this option for the action alert displays the Facebook widget on the Thank You page and prompts your advocate to post information about the action alert to their Facebook account
    - d. *Title* Set title to be displayed on Facebook
    - e. *Post Description* Issue description that will be show on outlining the Action Alert on Facebook
    - f. *Post Message* –Text that will display on Advocate Facebook page with link to the alert.
  - <u>Twitter</u>-AC 3.1 will permit your advocates, after taking action, to tweet a link to the Action Alert to their page to foster new advocates to take action and sign up to your advocate network.
    - a. Tweet will include the following:
      - i. Suggested Text that may be edited by users
      - ii. Video if present in previous step
      - iii. Bitly link to your action alert

#### When satisfied with the social media setup you are ready to setup confirmation email

# Confirmation

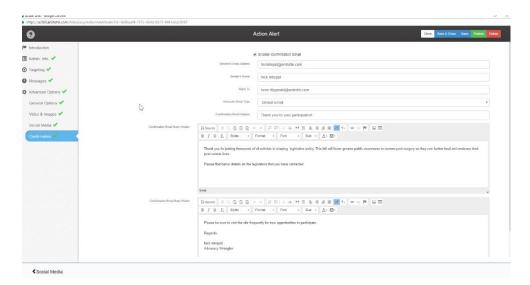
**Confirmation Email** – AC 3.1 will support a dedicated confirmation email to your advocates detailing their participation in your action alert.

This will serve as a reminder of the action taken by your advocates as well as provide an additional touch point between your organization and the advocate. You will be able to control the content, subject, reply to and send by information.

360 will automatically include the name of the Alert and the names of each Legislator to whom your advocate sent their Advocacy Message. The location of this 360 generated text will between the Confirmation Email Body (your content) and Confirmation Email Body Footer.

- 1. Enable Confirmation Email
- 2. Set Sender's Email Address Detail the email address you wish to appear in "From" Line
- 3. Set Sender's Name This is the familiar name that will show in the From line
- 4. Set Reply To To insure you don't overwhelm you inbox you may wish to select an email box that permits you to manage responses
- 5. Set Advocate Email Type All email preferences are set in 360 in the individual record
  - b. Default Email
  - c. Personal Email
  - d. Work Email
- 3. Confirmation Email Body Header This is the main body of the message that will appear **BEFORE** the activity detail (Name of Alert and Legislators to whom your advocate sent an alert message).

4. Confirmation Email Body Footer – This is the closing of the message that will appear **AFTER** the activity detail (Name of Alert and Legislators to whom your advocate sent an alert message).



### **Review Your Alert**

To Review you alert simply select Open Alert and use one of the navigation options. The most direct method is to select "Navigate to the URL" and the alert will be open in a new Tab on your browser.

Action Alert	Close	Unpublish	Open Alert -	
Open Alert: Provides four options to review your published alert. Show URL - Provides link to access your alert Show IFrame Code - Provides code you may use to embedd alert		Show URL Show IFran Navigate to Action Alert		
within an IFrame <u>Navigate to the URL</u> - Navigate to your Action Alert <u>Action Alerts Introduction</u> - Takes you to your published list of all				
Action Alerts within Action Center				