



Feature Summary: Advocacy Email “From” Fields

Module: Advocacy

Release: Winter 2011

Document Owner: Michelle Shefter

New Terms or Concepts

Sender Verification – To ensure that email is delivered to the inbox (and not trapped in SPAM folders), your organization needs to comply with two sender verification standards: Sender ID and DomainKeys. These standards allow the ISPs to identify email publishers, evaluate their mail reputation, and make delivery decisions. If your email passes sender verification, it has a much higher probability of being delivered to the inbox, rather than rejected or diverted to the bulk or junk mail folder.

Different ISPs utilize different sender verification standards, so clients need to adopt two different standards: Sender ID/SPF and Yahoo! DomainKeys.

- **Sender ID/SPF** requires that clients modify their DNS with a TXT record that specifies the IP addresses of mail servers that are authorized to send email in that domain's name. Hotmail and MSN.com utilize Sender ID to evaluate incoming email, and some versions of Microsoft Outlook flag email that fails Sender ID as suspicious. AOL and gmail utilize SPF to evaluate incoming email.
- **DomainKeys** is a competing standard developed by Yahoo!. It requires that clients modify their DNS with a TXT record including a public key encryption signature. Although not as widely adopted as Sender ID/SPF, it is nonetheless very important to Convio clients, since Yahoo! is the second largest ISP in terms of prevalence on client lists. DomainKeys offers stronger and more precise authentication than Sender ID/SPF, because it authenticates individual email messages rather than mail servers.

While these configurations are primarily used for the purpose of delivering emails to your constituents, they are also relevant for delivering advocacy emails to targets, particularly for local officials, many of whom may receive communications in personal email accounts. Click this link for the most up-to-date information on Email Sender Verification:

http://customer.convio.com/site/PageServer?pagename=Email_Sender_Verification

Overview

In order to make sure that constituents' messages to their elected officials aren't caught in SPAM folders, Convio uses an organizational contact name and email in the "Sender Header" of the message. This helps to guarantee that the domain of the "sending" email is an approved sender of messages from Convio's IP. Prior to this release, the organization name and contact email was set in a single place for the instance of Convio. With this release, we have made it possible to set these fields at both the Center level (for MultiCenter clients) and at the alert level (for situations where multiple entities, such as a C3 and a C4, share the same instance of Convio).

This feature leverages the fields introduced into the Administrative Interface in the Summer 2010 release (for submitting webforms to the White House). At that time, the fields were only used for White House webform submissions. We will now use these same fields to deliver messages to advocacy targets by email, but not for any other webform deliveries.

Key Features & Benefits

Features

- Fields available for configuration at the alert level, in Center advocacy options, and as an SPF at the site level

Benefits

- Same great advocacy email delivery rate as always
- Advocacy messages will be associated with the appropriate contact organization name and email – whether that be a state affiliate, a separate internal department, or a 501 (c) 4 sister organization

Considerations for Clients

- The email domain used in these messages needs to be a domain that is used by the organization. To prevent messages from getting trapped in SPAM folders or being rejected, that domain should have Sender ID/SPF and DomainKeys configured.

Limitations and Out of Scope Features

- The admin interface will not display an error message to notify an admin if the domain name they are using has been properly configured. This type of warning will be added in a future release.
- On LTE alerts, it is not possible to configure the org name and email at the alert level. These fields will be added to the LTE alert configuration process in a future release.

Feature Configuration

To specify the default organization name and contact email, there are two SDPs to configure:

- Advocacy_Default_Organization_Email and
- Advocacy_Default_Organization_Name.

For multicenter clients, there are two CDPs to configure:

- Center-level Advocacy Default Organization Name and
- Center-Level Default Organization Email.

In addition, the ability to grant an administrator permission to edit the default name and email address at the alert level is added.

Convio SDP Configuration


The new SDPs will initially be populated with the values from SITE_NAME and SITE_CONTACT_EMAIL. Please contact Convio Support to request a change to these SDPs.

Convio CDP Configuration

- 1) Switch to the appropriate Center's main administrative page

- 2) Click **Advocacy Options** under the Center Actions section on the right side of the page.

Washington D.C. Health Societ... | [Switch to another center](#)
Hello, [System Administrator](#) | [CONVIO ADMIN on bvt101](#) | [Help](#) | [Log Out](#) | [Login As Admin](#)
Spam Complaints: unknown

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Centers

Center List [Global MultiCenter Options](#)

[Center List](#) > Center Details: Washington D.C. Health Society Center

Washington D.C. Health Society Center

Description: Washington D.C. affiliate of the American Health Society.
Center ID: 1042
Security Category: Washington D.C. Health Society Center

Date created:
May 18, 2010 6:54:52 PM
by Site Administrator

Date modified:
May 18, 2010 6:54:52 PM
by Site Administrator

Members [View Members](#) | [Add Members](#)
Total Members 1

Email

Opted Out of Site Email	1
Opted Out of Center Email	1
Hard Bounces	0
Soft Bounces	0
Usable Email Addresses	0


[Switch to this Center](#)
You are in Washington D.C. Health Society Center

Center Actions

[Edit Center](#)
[Edit Center-Level Options](#)
[Manage Administrators](#)
[Customize Standard Pages](#)
[Edit Advocacy Options](#)
[Edit Report Writer Options](#)

- 3) Enter the center-specific, default organization name and email. Click **Save**.

Washington D.C. Health Societ... | [Switch to another center](#)
Hello, [System Administrator](#) | [CONVIO ADMIN on bvt101](#) | [Help](#) | [Log Out](#) | [Login As Admin](#)
Spam Complaints: unknown

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Centers

Center List [Global MultiCenter Options](#)

[Center List](#) > [Center Details: Washington D.C. Health Society Center](#) > Edit Advocacy Options

1. Edit Advocacy Options

Configure the Advocacy Options for this center. You can override the default organization name and/or default organization email and enable sending and receiving of syndicated action alerts. You can also restrict access to blanket targets, target folders, and targets from specific states at both the Federal and State levels.

1.Center-Level Advocacy Default Organization Name:
Enter the default organization name to associate with alerts from this center.
☒ **Yes, override the site-level default value ("Shasta Test Site") with the value entered below**

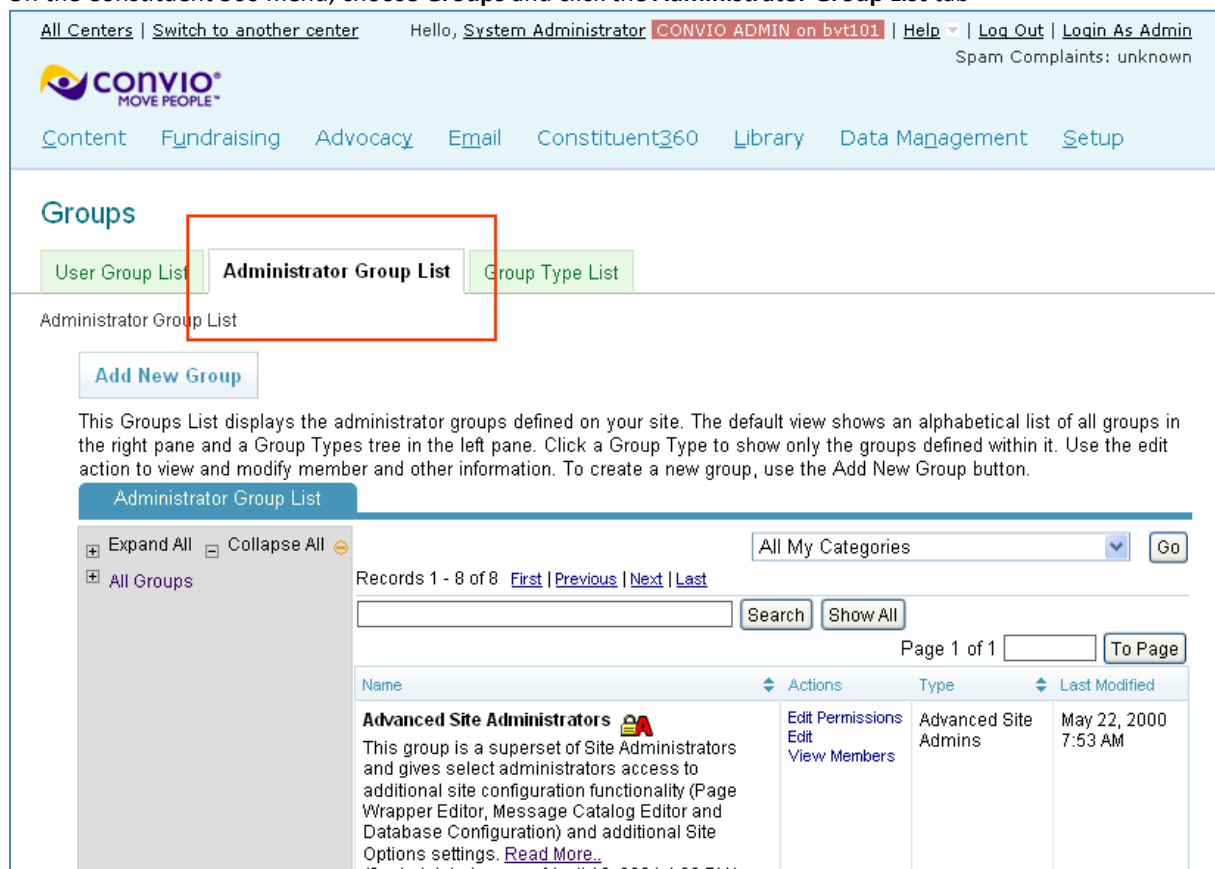
2.Center-Level Advocacy Default Organization Email:
Enter the default organization email address to associate with alerts from this center.
☒ **Yes, override the site-level default value ("qa@convio.com") with the value entered below**

3.Advocacy Syndication for Action Alerts:
Select from the following options to control whether this Center will be able to send and receive

Permissions Configuration

Existing administrators who have the “Manage Advocacy Alerts” permission will be automatically upgraded to the “Manage Advocacy Alerts and Organization Information” permission. To provide any additional administrators the permission to override the organization name and email at the alert level, follow these steps:

- 1) On the Constituent 360 menu, choose **Groups** and click the **Administrator Group List** tab



The screenshot shows the Convio web interface. At the top, there's a navigation bar with links like 'All Centers', 'Switch to another center', 'Hello, System Administrator', 'CONVIO ADMIN on bvt101', 'Help', 'Log Out', and 'Login As Admin'. Below this is a secondary navigation bar with 'Content', 'Fundraising', 'Advocacy', 'Email', 'Constituent360', 'Library', 'Data Management', and 'Setup'. The main content area is titled 'Groups' and has three tabs: 'User Group List', 'Administrator Group List' (which is highlighted with a red box), and 'Group Type List'. Below the tabs, there's a section titled 'Administrator Group List' with an 'Add New Group' button. A descriptive paragraph explains the Groups List functionality. Below the text, there's a search and filter section with a dropdown for 'All My Categories' and a 'Go' button. A table of records is displayed, showing 'Advanced Site Administrators' as the first group. The table has columns for Name, Actions, Type, and Last Modified.

Name	Actions	Type	Last Modified
Advanced Site Administrators This group is a superset of Site Administrators and gives select administrators access to additional site configuration functionality (Page Wrapper Editor, Message Catalog Editor and Database Configuration) and additional Site Options settings. Read More... <small>(0 administrators as of April 12, 2004 4:00 PM)</small>	Edit Permissions Edit View Members	Advanced Site Admins	May 22, 2000 7:53 AM

2) Select an administrator group and click the **Edit Permissions**.

All Centers | [Switch to another center](#) Hello, [System Administrator](#) **CONVIO ADMIN on bvt101** | [Help](#) | [Log Out](#) | [Login As Admin](#)
Spam Complaints: unknown

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Groups

[User Group List](#) **Administrator Group List** [Group Type List](#)

Administrator Group List

[Add New Group](#)

This Groups List displays the administrator groups defined on your site. The default view shows an alphabetical list of all groups in the right pane and a Group Types tree in the left pane. Click a Group Type to show only the groups defined within it. Use the edit action to view and modify member and other information. To create a new group, use the Add New Group button.


Administrator Group List

Expand All Collapse All ☺

All Groups

Records 1 - 1 of 1 [First](#) | [Previous](#) | [Next](#) | [Last](#)

washington Page 1 of 1

Name	Actions	Type	Last Modified
Washington D.C. Health Society Center Administrators 	Edit Permissions Edit View Members	Center Administrator Groups	May 18, 2010 6:54 PM

Records 1 - 1 of 1 [First](#) | [Previous](#) | [Next](#) | [Last](#)

3) In the Choose Permission Type dropdown list, select **Advocacy Management** and click **Choose**.

All Centers | [Switch to another center](#) Hello, [System Administrator](#) **CONVIO ADMIN on bvt101** | [Help](#) | [Log Out](#) | [Login As Admin](#)
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Permission Management

[User Group List](#) [Group Information](#) [Members](#) **Group Permissions**

Washington D.C. Health Society Center Administrators

You are editing permissions for the Group: Washington D.C. Health Society Center Administrators
[View all permissions for Washington D.C. Health Society Center Administrators](#)

Choose Permission Type

What type of permissions do you want to edit?

- 4) Select **Manage Advocacy Alerts and Organization Information** as the default permission and click **Save**.

Default Permission

The default permission on **Advocacy Management** for this group will be applied to all categories not being overridden below, as well as all new categories that are created in the future.

Changing this default permission will immediately affect all currently existing categories not explicitly overridden below.

Permissions displayed below are listed in order of increasing privilege, bottom to top. Any individual permission listed is a superset of the permission listed immediately below it.

Default Permission:

- ☐ **Manage Advocacy Alerts and Organization Information**
Allow administrators in this group to create, edit, delete and manage advocacy alerts, view advocacy reports, and modify the organization name and email fields for advocacy alerts.
- ☐ **Manage Advocacy Alerts**
Allow administrators in this group to create, edit, delete and manage advocacy alerts as well as view reports for advocacy alerts.
- ☐ **View Advocacy Reports**
Allow administrators in this group to view reports for advocacy alerts.
- ☐ **Advocacy API**
Allow administrators in this group to call Convio Advocacy APIs. Administrators in this group will not be able to log in to the site.
- ☒ **No additional permissions (inherit from Any registered user)**

Categories being overridden

[Add an override](#) [Show all categories](#)

Alert Configuration

- 1) Administrators *with* permission to override the default organization name and contact email address can do so in step 3 (**Alert Message**) of the alert configuration.

[Action Alerts](#) > Joan's All Centers Alert

- Identify Alert
- Advanced Options
- Alert Message
- Select Targets
- Select Contact Fields
- Include Questions
- Configure Autoresponder
- Thank You Page Options
- Design Alert
- Configure Pages
- Preview Alert
- Publish Alert

*** 1. Webform Mapping Topic:**
(For delivery to Webforms) Select a mapping topic for this alert. The topic will be mapped to the closest matching topic in the recipient Webform, ensuring more reliable delivery.
Aging, Retirement & Seniors Issues

*** 2. Organization Name:**
Enter the organization name to associate with this alert. This name will be used for submitting webforms, but will not be visible to users.
American Health Society

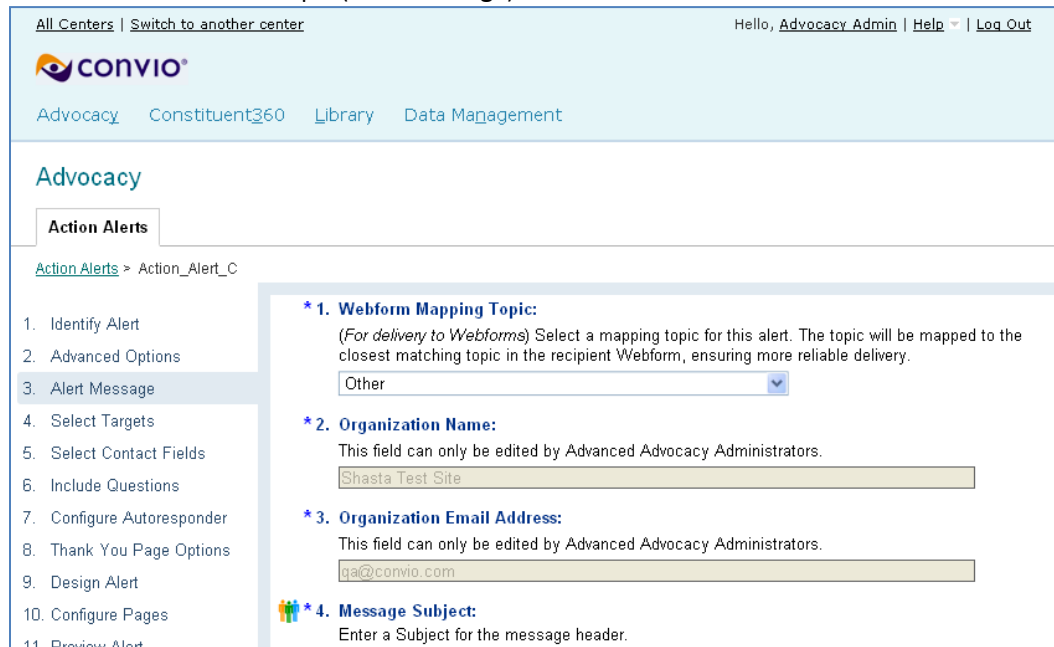
*** 3. Organization Email Address:**
Enter the organization's email address to associate with this alert. This email address will be used for submitting webforms, but will not be visible to users.
info@ahs.org

*** 4. Message Subject:**
Enter a Subject for the message header.
Aging is Inevitable

5. Subject Edit Option:
Choose whether advocates can edit the Message Subject.
☒ No
☐ Yes (optional)
☐ Yes (required)

*** 6. Message Greeting:**
Enter the message greeting, such as *Dear* or *To*. The recipient's title and name are inserted automatically. (See Representation form)

- 2) Administrators *without* permission to override the default organization name and contact email address can see the contents of the fields in step 3 (**Alert Message**) but cannot edit them.



All Centers | [Switch to another center](#) Hello, [Advocacy Admin](#) | [Help](#) | [Log Out](#)

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Advocacy

Action Alerts

[Action Alerts](#) > Action_Alert_C

1. Identify Alert
2. Advanced Options
3. Alert Message
4. Select Targets
5. Select Contact Fields
6. Include Questions
7. Configure Autoresponder
8. Thank You Page Options
9. Design Alert
10. Configure Pages
11. [Preview Alert](#)

*** 1. Webform Mapping Topic:**
(For delivery to Webforms) Select a mapping topic for this alert. The topic will be mapped to the closest matching topic in the recipient Webform, ensuring more reliable delivery.

*** 2. Organization Name:**
This field can only be edited by Advanced Advocacy Administrators.

*** 3. Organization Email Address:**
This field can only be edited by Advanced Advocacy Administrators.

*** 4. Message Subject:**
Enter a Subject for the message header.