

# Getting Started

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## Using Your New Capwiz-XC Site!

*Thank you for choosing Capwiz-XC to advance your advocacy goals! Below are seven important items to keep in mind as you get started using Capwiz-XC.*

### 1 RECEIVE WEB SITE AND LOG-IN INFORMATION

Once your Capwiz-XC site is built, you will receive an e-mail from your assigned Account Manager with web site and log-in information. Take this opportunity to make sure you are satisfied with the general layout and site template (or "site wrapper"). If not, provide your Account Manager with the web page or HTML to use as a template for your organization's site.



### 2 REGISTER FOR BASIC TRAINING

Sign up for a free Basic Training course as soon as possible to get the most value from your investment. Basic Training courses, available online and in the D.C. area, provide a basic understanding of the features and capabilities of your Capwiz-XC site and prepare you to begin efficiently using the product.



Your Capwiz-XC education doesn't end after you have completed the Basic Training! Take the necessary steps to become a Capwiz-XC expert administrator. Capitol Advantage offers a variety of online Advanced Training courses that teach best practices and strategies on how to best utilize the most popular features of Capwiz-XC. Find out more about all of our trainings at [www.capitoladvantage.com](http://www.capitoladvantage.com).

### 3 UPLOAD RECORDS INTO YOUR USER DATABASE

After attending a basic training, one of the first things you should do is upload your supporters' names, home addresses, and e-mail addresses into the Capwiz-XC User Database. Once those records are uploaded, they will be mapped to their Congressional and state districts, as well as listed as "Subscribers," meaning you can send them e-mails using Mail Manager.

Your Account Manager can help with your initial upload. Your file must be in CSV (comma delimited) or TXT (tab delimited) format. Ask your Account Manager to create custom fields if you would like additional data stored in the User Database.

#### Training Attendee Feedback:

*"The training session was excellent. I feel much more comfortable using the software."*

*"I was very pleased with the training. It was informative and helpful. The trainer was very knowledgeable of the system and content."*

*"Extremely informative....I feel much more comfortable with using the system. I plan to recommend others in the organization to sign up for online trainings."*

## 4 PRACTICE CREATING AN ALERT, POSTING LEGISLATION, AND SENDING AN E-MAIL THROUGH MAIL MANAGER

After completing the Basic Training course, it is a good idea to become familiar with the front-end and administrative side of your Capwiz·XC site. Here are some things to practice before you invite supporters to visit your site:

### Sample Scorecard

Choose Your State:	All States						
<b>Alabama Representatives</b>							
1. Jo Bonner (R-AL)	-	-	-	-	-	42%	
2. Terry Everett (R-AL)	-	-	-	-	-	42%	
3. Michael Rogers (R-AL)	-	-	-	-	-	57%	
4. Robert Aderholt (R-AL)	-	-	-	-	-	57%	
5. Robert Gramer (D-AL)	+	+	NV	-	-	65%	
6. Spencer Bachus (R-AL)	-	-	-	-	-	57%	
7. Artur Davis (D-AL)	-	-	-	-	-	57%	
<b>Alaska Representatives</b>							
1	2	3	4	5	6	7	Score
Don Young (R-AK)	NV	-	-	-	-	-	50%
<b>Arizona Representatives</b>							
1	2	3	4	5	6	7	Score
1. Rick Renzi (R-AZ)	-	-	-	-	-	-	42%
2. Trent Franks (R-AZ)	-	-	-	-	-	-	42%
3. John Shadegg (R-AZ)	-	-	-	-	-	-	42%
4. Ed Pastor (D-AZ)	-	-	-	-	-	-	57%
5. Harry Mitchell (R-AZ)	-	-	-	-	-	-	57%
6. Jeff Flake (R-AZ)	-	-	-	-	-	-	25%
7. Raul Grijalva (D-AZ)	-	-	-	-	-	-	57%
8. Gabrielle Giffords (D-AZ)	-	-	-	-	-	-	57%
<b>Arkansas Representatives</b>							
1	2	3	4	5	6	7	Score
1. Marion Berry (D-AR)	-	-	-	-	-	-	57%
2. Vic Snyder (D-AR)	-	-	-	-	-	-	57%
3. John Seaman (R-AR)	-	-	-	-	-	-	42%
4. Mike Ross (D-AR)	-	-	-	-	-	-	57%

- 1. Create an Action Alert.** Post an alert to your site. Follow the steps you learned in your Basic Training. After posting the alert, view it on the front end. Once you are satisfied with your "sample alert," go ahead and archive it so that it is no longer live on your site.
- 2. Post key bills and votes.** Search for key bills and votes in your administrative site. Create a scorecard. Make sure you know how the key legislation looks on the front end of your Capwiz·XC site. Once satisfied, go ahead and delete your "sample votes/bills."
- 3. Send an e-mail to yourself using Mail Manager.** First, create a record for yourself in the User Database. Once created, go ahead and create a "User Profile Query" based on your e-mail address. Now that you have created a mailing list that only includes your e-mail address, go over to Mail Manager and practice creating an e-mail. Try out the e-mail templates provided. Send the e-mail to yourself.

## 5 **Brand** YOUR E-MAILS WITH CUSTOM TEMPLATES

Make sure the e-mails you send to your supporters have your organization's branding. Send your Account Manager the HTML template, or even a JPEG logo, and he/she will have your template(s) created and added to the template drop-down menu in your Mail Manager.

## 6 READY SITE FOR LAUNCH

It is now time to prepare your Capwiz·XC site to go live. Double-check your site template, create an Action Alert, post some key legislation, and use the Page Builder tool to customize your Capwiz·XC home page. Ask your Account Manager for help if needed. When you are satisfied with the look and content of your site go ahead and link to your Capwiz·XC site from your organization's home page. Use Web Stickers to drive traffic to your Capwiz·XC site.

## 7 SEND AN INTRODUCTORY E-MAIL TO YOUR SUPPORTERS

Using the Grassroots Toolkit located in Mail Manager, send an introductory e-mail to your mailing list. This message will introduce users to your new advocacy tool and provide them with a link to visit your new Capwiz·XC site. Feel free to edit and personalize the content of this message.

It is important to tell your supporters to expect e-mails from you in the future. Ask them to add your e-mail address to their address book (or white list).



### Need Help?

Capitol Advantage provides around-the-clock customer support. Call 800.659.8708 and an Account Manager will be happy to assist you with Capwiz·XC.

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