

“Capwiz·XC is the best investment you can make in furthering your mission.” - Carole Baskin , CEO of Big Cat Rescue

## Basics of Your Capwiz·XC Service

### Capwiz·XC Public Site

[www.capwiz.com/yourdir/](http://www.capwiz.com/yourdir/)

“Your Dir” is the tag (or directory) assigned to your organization that is used as part of your Capwiz·XC URL.

### Capwiz·XC Administrative Site

[www.capwiz.com/yourdir/admin/](http://www.capwiz.com/yourdir/admin/)

**Change Your Password.** Click on the Settings tab in your Capwiz·XC admin site. The “Change Password” link is located in the sub-navigation bar.

**Check your Capwiz·XC site template.** Make sure your Capwiz·XC site matches the look and feel of your organization’s web site. Contact your Account Manager to update your site template.

**Create a link from your organization’s web site to your Capwiz·XC site.** Your webmaster should create easy-to-find links on your organization’s web site to drive traffic to your Capwiz·XC site ([www.capwiz.com/yourdir/](http://www.capwiz.com/yourdir/)).

**Become a Capwiz·XC Expert.** We offer weekly free online advanced trainings to teach you the techniques used by the most successful Capwiz·XC clients. Find out more about our training programs at [www.capitoladvantage.com](http://www.capitoladvantage.com).



Example of a Capwiz·XC Public Site

## Customer Support

**24/7 Customer Service** – Capitol Advantage provides around-the-clock customer support. Call 866.633.0789 and an Account Manager will be happy to assist you in your use of Capwiz·XC.

Located on the right side of the Capwiz·XC admin home page, as well as on the left side of every internal admin page, is the Customer Support phone number and a way for you to send an e-mail to the Customer Support Team.

**Help?** – Located in the upper-right corner of your admin site, this link will allow you to view the online Capwiz·XC user manual.

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## How to create an Action Alert

Under the Alerts & Messages tab, click on the Create Alert button.

**Alert Options** – Select the type of Alert you want to create by clicking the “Go” button next to the desired option.

- **Basic Alert and Message** – The standard Action Alert, telling the user about an issue and then urging them to send a message.
- **Info-Only Alert** – An alert without the action step. Post information, but do not urge the user to send a message.
- **Call Alert** – Similar to the Basic Alert and Message, but instead of sending a message the user will make a phone call to the elected official’s office.
- **Basic Alert and Video Advocacy Message** – You create a video message, upload it to YouTube.com, and use the Capwiz·XC form to send the video message to decision-makers.
- **Smart Alerts** – Targeted action alerts with different messages based on recipients’ vote, bill- sponsorship, committee membership, party, state, etc.

## Follow these simple steps to post Action Alerts to your Capwiz·XC site.

### 1. Targeting Options --> 2. Edit Alert --> 3. Edit Message --> 4. Save and Finish

1. Who you want supporters to send messages to. Click “Next Step”
2. Alert the user of the issue. Tell them why this issue is important and why they should take action. Keep the Alert text short and to the point. Click “Next Step”
3. Provide the user with the body, or talking points, of the message to be sent to elected officials. To make more of an impact, make this text editable. Click “Next Step”
4. Review the target(s), alert text, and message. Click “Save and Finish”

*You can always edit the alert and message texts after you have saved the Action Alert.*

**Archive Old Alerts** – Click the “Archive” link next to the alert to remove an Action Alert from your live Capwiz·XC site. The Alert and Message Archive is located below the Alerts and Messages tab, this archive stores all of your expired or archived action alerts. You can restore these alerts and make them active again at any time.

## A Quick Overview of Capwiz·XC

**Legislative Action Center** – An online advocacy tool designed for you and your supporters. Supporters can search for elected officials, view committee assignments, take action on alerts, sign up for the mailing list, view important legislation, write Letters to the Editor, and much more. The layout of your Capwiz·XC site can be customized using the Page Builder tool located in your admin site.

**Advocate Database** – Search and segment your advocate database by a supporter’s location, activity history or any custom criteria. Send targeted e-mail communications to any segment of your list. Upload an existing database to Capwiz·XC and have your records automatically district matched.

**Advanced Reporting** – Under the Reports tab in your admin site, there is a wealth of information showing how your Capwiz·XC site is being used. Assess the results of your advocacy efforts and strategize your next steps.

**Action Alerts** – Created in the Capwiz·XC admin site and posted on the Legislative Action Center, Action Alerts make it easy for supporters to send targeted letters to elected officials, the media, and any other custom target.

**Key Votes and Bills** – Keep your supporters up to date on important issues by posting key legislation on your site. Create federal and state scorecards to illustrate legislative support.

**Outbound E-Mail Marketing** – Use Mail Manager to reach out to your supporters with timely e-mail communications.

**Election Guide** – A resource for your members to research Presidential, Congressional and state candidates, register to vote, view candidate endorsements and comments, find polling locations, request absentee ballots, and review election dates and voter/candidate deadlines.

## Send an Action Alert to Your Supporters

Once you've posted an Action Alert on your Capwiz-XC site, use Mail Manager to e-mail out the Action Alert to your supporters. Follow these steps:

1. **Under the Mail Manager tab**, click on the "Compose List Message" button.
2. **Select the option for "An Existing Capwiz-XC Alert"** and click on the Next Step button.
3. **Select your targeted database query**, or list, and fill out the "From Name," "From E-Mail," and "Subject" fields.
4. **Set the delivery** date and time.
5. **Track** "Messages Opened" and "Links Followed."
6. **Choose an e-mail template** from the dropdown menu. Contact your Account Manager to create a custom template with your organization's logo and desired look and feel.
7. **Select your Action Alert** from the list!
8. **Click the "Preview"** button. Review the e-mail. Send a copy of the e-mail to yourself before you send it out to your list.
9. **Once satisfied with the e-mail**, select the "Save and Send" button.

## Send E-Mails to Your Supporters

In addition to sending Action Alerts to your supporters, you can also use Mail Manager to send e-mails, e-newsletters, invitations, etc. Create your own message by:

- **Using** the HTML editor
- **Pasting** in pre-written HTML code
- **Editing** the Capwiz-XC Grassroots Toolkit messages, which are written by Capitol Advantage's grassroots experts to help you recruit, train, and retain supporters. Edit the messages to include information specific to your organization.



## Managing Your User Database

**Upload your membership list** into the Capwiz-XC User Database. Follow the "List Upload" instructions in the User Database section of your admin site, or contact your Account Manager for help. Once the list is uploaded, the contacts will be matched to their legislative districts and available for you to send e-mails to using the e-mail marketing tool, Mail Manager.

### *These are common terms used in the User Database:*

**User** – Any person that has a record in your User Database. This person may have sent a message through your Capwiz-XC site, subscribed to your Mail Manager mailing list, been imported by you, or any combination of these.

**Activist** – Any user that has sent a message through your Capwiz-XC site.

**Subscriber** – Any user that has signed up for your Mail Manager mailing list, or a user imported and marked as a "Subscriber."

**Query** – A segment of your User Database. Use the Default Queries or create your own User Profile, Legislative or Combined queries. Queries can be exported into Excel or used as the target for e-mails sent through Mail Manager. Queries can be created based on a person's:

- Location (city, state, zip, district)
- Actions Taken
- Subscription status and joined date
- Custom criteria

## Publish Key Legislation

**Educate site visitors on important issues**, and encourage them to keep track of how their legislators vote on key legislation with Capwiz-XC scorecards! In the “Votes & Bills” section of your Capwiz-XC admin site, you can search for legislation by keyword or bill number and publish the selected bills and/or votes to the Issues and Legislation section of your public Capwiz-XC site.

Choose Your State: All States							
<b>Alabama Representatives</b>							
1. Jo Bonner (R-AL)	1	2	3	4	5	6	7 Score
2. Terry Everett (R-AL)	-	-	-	-	-	-	42%
3. Michael Rogers (R-AL)	-	-	-	-	-	-	57%
4. Robert Aderholt (R-AL)	-	-	-	-	-	-	57%
5. Robert Cramer (D-AL)	-	-	-	-	-	-	68%
6. Spencer Bachus (R-AL)	NV	-	-	-	-	-	50%
7. Artur Davis (D-AL)	-	-	-	-	-	-	57%
<b>Alaska Representatives</b>							
Don Young (R-AK)	1	2	3	4	5	6	7 Score
	NV	-	-	-	-	-	50%
<b>Arizona Representatives</b>							
1. Rick Renzi (R-AZ)	1	2	3	4	5	6	7 Score
2. Trent Franks (R-AZ)	-	-	-	-	-	-	42%
3. John Shadegg (R-AZ)	-	-	-	-	-	-	42%
4. Ed Pastor (D-AZ)	-	-	-	-	-	-	57%
5. Harry Mitchell (D-AZ)	-	-	-	-	-	-	57%
6. Jeff Flake (R-AZ)	-	-	-	-	-	-	28%
7. Raul Grijalva (D-AZ)	-	-	-	-	-	-	57%
8. Gabrielle Giffords (D-AZ)	-	-	-	-	-	-	57%
<b>Arkansas Representatives</b>							
1. Marion Berry (D-AR)	1	2	3	4	5	6	7 Score
2. Vic Snyder (D-AR)	-	-	-	-	-	-	57%
3. John Boozman (R-AR)	-	-	-	-	-	-	42%
4. Mike Ross (D-AR)	-	-	-	-	-	-	57%

Use the default summary of the legislation provided by Capwiz-XC, or create your own custom summary for your users. Additionally, you have the option of posting your organization’s position on the issue.

## Advanced Reporting

Under the Reports tab in your admin site, there is a wealth of information showing how your Capwiz-XC site is being used. Assess the results of your advocacy efforts and strategize your next steps. Use the Influence Factors and Influence Score to look beyond the raw numbers and determine your true impact.

## Pagebuilder

Improve the online experience for your users. Select one of the pre-existing layout options or create your own home page to better focus your online campaign. Capwiz-XC’s Page Builder can be found in the sub-heading of the “Content” section of your admin site.

## Drive Traffic to Your Site

**Web Stickers** – A wide variety of Web Stickers are currently available to help drive traffic to your Capwiz-XC site. These stickers draw attention and catch the site visitor’s eye more than the average web page hyperlink.



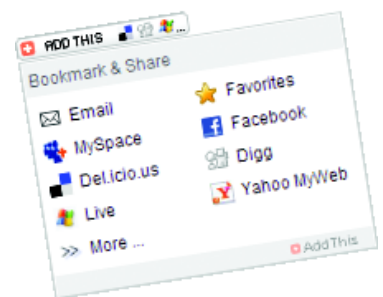
**Tell-A-Friend** – Urge your members help build your network by giving them the tools to inform their friends and colleagues about the action(s) they just took!

**Alert Blaster** – AOL, Yahoo!, MSN, Congress.org, e.thePeople, Sacramento Bee, LATimes, USAToday, and C-SPAN are all part of the Capwiz-XC Media Network. As part of this network, each of these media organizations publish action alerts created by any of our 1500+ Capwiz-XC customers. Millions of “accidental activists” originate from these media sites every year.



Alert Blaster is found at the bottom of Step #2 (Edit Alert) in the Action Alert creation process. After you create your alert text, scroll down and check the box next to “Alert Blaster.” Select up to five issue categories for your alert to be listed under on these media sites. Make sure you Save & Finish your alert!

**AddThis!** – Encourage your advocates to post your Action Alert to their social networking or social bookmarking sites by turning on the “AddThis” preference. This is a great way for your advocates to recruit their friends and colleagues to participate in your campaign.



To turn on the preference, in the “Settings” section of your admin site go to MailSys, then turn on “Social Bookmarking link on alert page.” Advocates simply click on the button and select their favorite site – your content is then added to your advocates’ pages!

# Additional Services Available With Your Capwiz·XC Service

## Additional Message Delivery Options

Diversify your Advocacy Efforts with Capwiz·XC by contacting elected officials with a variety of advocacy message delivery options.

- **Advocacy Xpress** – In addition to phone, postal mail, and e-mail, we also hand deliver constituent messages to the Capitol Hill mail center at least twice a week depending on message volume. Bypass the increased security for traditional mail which can hold your message up for weeks.
- **Fax** – Have your advocacy messages faxed to federal and state elected officials' offices.

## Fundraising

Turn your activists into donors and your donors into activists! Combine your advocacy and fundraising efforts under one online system for maximum results.

Create an online giving experience that reassures donors where their money is going and encourages them to participate further in your advocacy campaign.

Promote your fundraising efforts to tens of thousands of people. Use Alert Blaster to publish your Fundraising Alert to the Capwiz·XC Media Network.



## Expand Your Advocacy Network

**State Affiliates** – Capwiz·XC for Affiliates combines all of your organization's forces to project a single, powerful voice to state and national policymakers. It is designed to help you build your campaign to ensure rapid adoption by local and state affiliates. Capwiz·XC gives you the power to build and coordinate your affiliates' involvement in your outreach campaign.



**MLM Pass-thru** – Work together with like-minded organizations! Any two Capwiz·XC client administrators can pass Mail Manager e-mails to each other, and then have the option to send these messages their respective database lists.

**Promote Your Organization on Congress.org!** Reach millions of active and engaged citizens by placing an advertisement on [www.congress.org](http://www.congress.org), one of the most popular public advocacy web sites.

## Customize Your Capwiz·XC Site

**Site Template by Alert** – Make your Action Alerts stand out with their own site template! Promote your action and fundraising alerts with a new look and feel. Design a template that encourages advocacy and provides tips for taking action. Add variety to your Capwiz·XC site with multiple looks.

**Branded Domains** – A Capwiz·XC-specific URL that contains the domain name of your organization. Branded Domains are composed in the following form:

**Example:** <http://<prefix>.yourdomain.com>

You select the prefix of your choice. Ideally it should be related to your Capwiz·XC site or your organization's cause. Your Branded Domain is always shown in the browser's address window on all portions of your Capwiz·XC site.

## Additional Services Available With Your Capwiz·XC Service, cont.

### Integration Methods

*Integration is the sharing and updating of data between your organization's database and Capwiz·XC.*

**Capwiz·XC Integration API (Application Programming Interface)** – Capwiz·XC's integration system works with major database vendors, such as Blackbaud, TMA Resources, IMPak by ISSI, iMIS by ASi, and Avector. Our product can also easily be configured to integrate with any organizations' database.

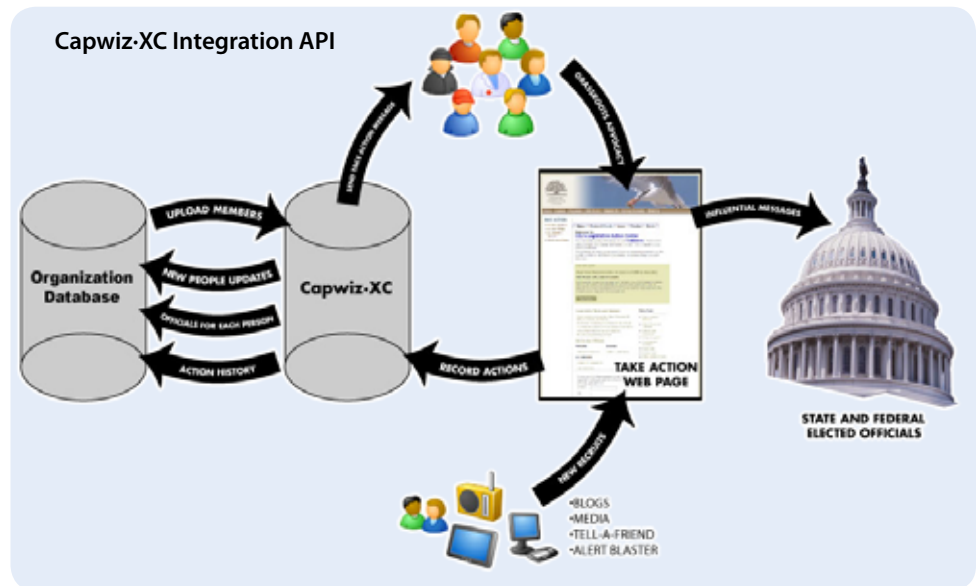
**SOAP Demographic Services** – An independent address-to-district lookup service, allowing records to be ZIP-matched outside of Capwiz·XC and returned with official names, contact info, bios, etc.

**CapXchange** – Keep your organization's independent database updated with current Capwiz·XC activity data. Set up a one-way, real-time data feed of Capwiz·XC activity data to your database.

**Automatic List Upload** – Save time by setting up an automatic upload of records from your database into Capwiz·XC. Setup of the Automatic List Upload will require someone with scripting & database experience on the Capwiz·XC client end.

**Capwiz·XC Advocacy Message API** – Set up action alerts without the Capwiz·XC form. Advocates can take action directly on an ad, widget or other form without going to a Capwiz·XC site. A Capwiz·XC site is required to track the results and identify the action alert.

**XML Data Feed** – Receive an XML feed containing official and/or candidate data. Receive scheduled data updates automatically, customized to include the data fields that matter most to you.



### Security Features

**User Login Permission Levels** – Create Capwiz·XC administrative permission levels for your staff.

**Capwiz·XC Access Protection Services** – Safeguard your site with advanced support tools, such as IP address filtering, password protection, referrer protection, and SSL encrypted data.

- **IP** – Capwiz·XC checks the IP address of the user's computer. If the IP address is on an approved list, then the request is allowed and the user can see the page. All other users are rejected and redirected to a predefined address.
- **Password** – Visitor must submit a password to enter your Capwiz·XC site.
- **Referrer** – With referrer protection all visitors to your Capwiz·XC site must come from a predefined page. If the request is from that page the user is allowed into your site. All other referrers, including empty referrers are rejected.
- **SSL** – A cryptographic system that uses two keys to encrypt data: a public key known to everyone and a private or secret key known only to the recipient of the message. Web addresses with SSL will read "https:" instead of "http:".



# Intelligence. Insight. Influence.

*Roll Call Group's mission is to provide the tools, access and information to understand and influence the legislative process. We are committed to providing our customers first-in-class innovative solutions to advance their organization's needs.*

Influential organizations excel in three areas of the legislative process:

- 1) Advocacy** - mobilizing supporters and presenting a unified voice to policy makers;
- 2) Policy** - becoming policy experts on their issue and the political process;
- 3) Connections** - managing relationships and interactions between legislators and constituents, as well as between legislative staff and the organization itself.

## Advocacy

### Online Advocacy

Capwiz-XC, the award-winning online advocacy and grassroots mobilization solution, helps your organization achieve legislative success by influencing state and federal policymakers, managing online fundraising, getting out the vote, and much more!

### Congressional Print Directories

*Congress at Your Fingertips*, a perennial Washington Post "Best Seller," contains valuable data on Members of Congress and their staff and can be customized for your lobbying and advocacy needs.

### Fax Broadcasts

Send faxed messages to Congressional or state elected officials and staff.

### Advocacy Advertising

Advertise in *Roll Call* and on Roll Call Group's Online Network to expand visibility for your issues, diversify your legislative outreach, and deliver a unified message to legislators and their staff.

## Policy

### Legislative Tracking

GalleryWatch provides real-time legislative information and news, and the technology to help you more effectively manage and implement your legislative strategy.

### Legislative Wire Service

CongressNow offers you same-day mark-up coverage, key documents, and targeted policy and committee news.

### Legislative Intelligence

Stay in the legislative loop with Briefing Room's six, topic-specific policy discussions created and organized online by policy analysts to deliver timely, comprehensive legislative information.

### Capitol Hill News

Since 1955, *Roll Call's* mission has been to deliver superior coverage of the people, politics, process and policy on Capitol Hill. With accurate, unbiased reporting, *Roll Call* and RollCall.com has earned a level of credibility unparalleled in Washington and beyond.

## Connections

### GR Management

Manage all contacts, meetings, phone calls, and interactions with elected officials in Knowlegis, the comprehensive source for government relationship management.

### Access to Congressional Staff

Easy, instant and accurate e-mail communication to congressional staff.

### Town Hall Meeting Alerts

Be alerted as town hall meetings are scheduled. Mobilize your supporters to attend meetings in their district.

### Member Fly-Ins

Coordinate an effective Lobby Day! Schedule appointments with elected officials, execute meetings, track and analyze the feedback.

### Legislative Data Files

Gain access to federal and state legislative data to be used in mail merges, follow-up campaigns, or other outreach efforts.

### PAC Management

PACbuilder is a secure, easy-to-use web-based solution that automates compliance reporting requirements for PACs.