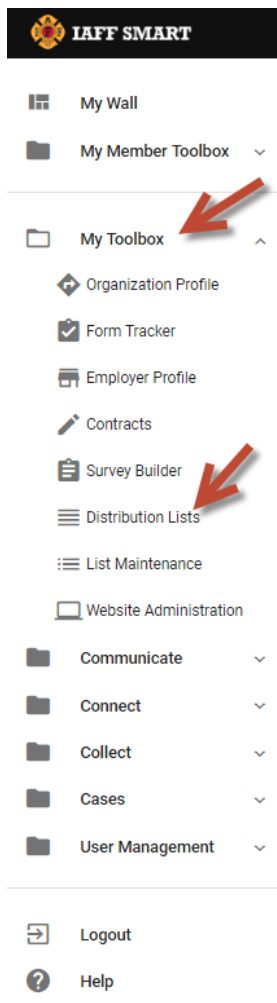


IAFF SMART – How to Create a Distribution List

Within IAFF SMART, you have the ability to create a “Distribution List”. In brief, a “Distribution List” is a filtered list of your member roster which you can save for recurring use. For example, you can use a “Distribution List” to send targeted communications to the members that it contains. A “Distribution List” is dynamic; it will always contain all members that meet the criteria that you configure for the list. Therefore, whenever you wish to communicate to members that meet the criteria, you do not have to re-query for them for each communication you send; you simply need to choose the saved “Distribution List”.

As an example, say you wish to send a regular email notification to your inactive retired members. You can configure a “Distribution List” that contains the members that meet these criteria and simply use it each time you wish to send the email notification. To configure such a “Distribution List”, please follow the below steps:

1. After logging into the IAFF SMART Portal, expand the “My Toolbox” link on the left-hand side of the page and then click on the “Distribution Lists” link:



2. This will take you to the “Distribution Lists” page. On the bottom half of the page will be your “Member Roster”; the full list of all members within your local. You will specify criteria to filter the list so that it only contains the members that you want included in your new “Distribution List”. To get started, enter a name for your new “Distribution List” in the “Add a New Distribution List” field. You should enter a descriptive name to make it easy to recognize which members the list includes. We will enter the name “Inactive Retired Members” for the new list we are configuring:

Distribution Lists

Manage your roster distribution lists here. Choose from a list saved below, or filter the grid below and save it as a reusable list.

Select an Organization *

L9997 Sitting Rock

Select a Distribution List to Edit

—

Add a New Distribution List

Distribution List Name and Description *

Inactive Retired Members

RESET + ADD

ROSTER CUSTOM FIELDS

PI	Last Name	First Name	Local	Member #	Status	Type	Employer	Balance	Auto Pay	Has Account	*Positions
	Abel	Richard	L9997 Sitting Rock	WD1306994	Active	Member	L9997 Sitting Rock	\$0.00	●	●	
	Acker	Justin	L9997 Sitting Rock	WD1085077	Terminated	Member	L9997 Sitting Rock	\$0.00	●	●	
	Adame	Rick	L9997 Sitting Rock	WD1055980	Inactive	Member		\$0.00	●	●	
	Adams	Carla	L9997 Sitting Rock	WD1306985	Withdrawn	Member	L9997 Sitting Rock	\$0.00	●	●	
	Adams	Curtis	L9997 Sitting Rock	WD0306589	Withdrawn	Member	L9997 Sitting Rock	\$0.00	●	●	
	Adams	Joseph	L9997 Sitting Rock	WD0374855	Active	Member	L9997 Sitting Rock	\$52.00	●	●	
	Adams	Justin	L9997 Sitting Rock	WD1087893	Withdrawn	Member	L9997 Sitting Rock	\$0.00	●	●	
	Adams	Randal	L9997 Sitting Rock	WD0549304	Inactive	Retired	L9997 Sitting Rock	\$0.00	●	●	

100 items per page

1 - 100 of 2,689 records

3. Next, we need to filter the member roster so that it just shows the “Inactive” members. To do so, click the “Settings” icon to the right of the “Status” column (the three dots icon) which will display the settings menu. Put your mouse pointer on the “Filter” option which will display the filter menu.....the menu will list all the values that currently appear in the “Status” column. Check the box for “Inactive” and then click the “Filter” button:

Add a New Distribution List

Distribution List Name and Description *

Inactive Retired Members

RESET + ADD

ROSTER CUSTOM FIELDS

PI	Last Name	First Name	Local	Member #	Status	Type	Employer	Balance	Auto Pay	Has Account	*Positions
	Abel	Richard	L9997 Sitting Rock	WD1306994	Active		L9997 Sitting Rock	\$0.00	●	●	
	Acker	Justin	L9997 Sitting Rock	WD1085077	Terminated		L9997 Sitting Rock	\$0.00	●	●	
	Adame	Rick	L9997 Sitting Rock	WD1055980	Inactive			\$0.00	●	●	
	Adams	Carla	L9997 Sitting Rock	WD1306985	Withdrawn		L9997 Sitting Rock	\$0.00	●	●	
	Adams	Curtis	L9997 Sitting Rock	WD0306589	Withdrawn		L9997 Sitting Rock	\$0.00	●	●	
	Adams	Joseph	L9997 Sitting Rock	WD0374855	Active	Member	L9997 Sitting Rock	\$52.00	●	●	
	Adams	Justin	L9997 Sitting Rock	WD1087893	Withdrawn	Member	L9997 Sitting Rock	\$0.00	●	●	
	Adams	Randal	L9997 Sitting Rock	WD0549304	Inactive	Retired	L9997 Sitting Rock	\$0.00	●	●	

100 items per page

1 - 100 of 2,689 records

Filter

1 items selected

Filter Clear

- Next, we need to further filter the list for “Retired” members. Click the “Settings” icon to the right of the “Type” column, put your mouse pointer on the “Filter” option, check the box for “Retired” and then click the “Filter” button:

Add a New Distribution List

Distribution List Name and Description *

Inactive Retired Members

ROSTER CUSTOM FIELDS

Pr	Last Name	First Name	Local	Member #	Status	Type	Employer	Balance	Auto Pay	Has Account	*Positions
	Adame	Rick	L9997 Sitting Rock	WD1025980	Inactive	Member	L9997 Sitting Rock	\$0.00	●	●	
	Adams	Randal	L9997 Sitting Rock	WD0549304	Inactive	Retired	L9997 Sitting Rock	\$0.00	●	●	
	Aguayo	Garnett	L9997 Sitting Rock	WD0090046	Inactive	Member	L9997 Sitting Rock	\$0.00	●	●	
	Ahalt	Richard	L9997 Sitting Rock	WD1314609	Inactive	Retired	L9997 Sitting Rock	\$0.00	●	●	
	Alani	Joseph	L9997 Sitting Rock	WD0227538	Inactive	Member	L9997 Sitting Rock	\$0.00	●	●	
	Allen	Robert	L9997 Sitting Rock	WD0398969	Inactive	Member	L9997 Sitting Rock	\$0.00	●	●	
	Alegre	John	L9997 Sitting Rock	WD0299473	Inactive	Retired	L9997 Sitting Rock	\$0.00	●	●	
	Alexander	Adolpho	L9997 Sitting Rock	WD0326683	Inactive	Retired	L9997 Sitting Rock	\$0.00	●	●	

100 items per page 1 - 100 of 928 records

- The filters that you apply to the list will be displayed in the “Filters Applied” section in the lower left-hand corner. By applying the two filters in our example, we have filtered the complete member roster of 2,689 individuals down to a list of 407. Now that we have the criteria (filters) set for our list, we need to click the “Add” button on the right to complete the process of creating the new “Distribution List”:

Add a New Distribution List

Distribution List Name and Description *

Inactive Retired Members

ROSTER CUSTOM FIELDS

Pr	Last Name	First Name	Local	Member #	Status	Type	Employer	Balance	Auto Pay	Has Account	*Positions
	Adams	Randal	L9997 Sitting Rock	WD0549304	Inactive	Retired	L9997 Sitting Rock	\$0.00	●	●	
	Ahalt	Richard	L9997 Sitting Rock	WD1314609	Inactive	Retired	L9997 Sitting Rock	\$0.00	●	●	
	Alegre	John	L9997 Sitting Rock	WD0299473	Inactive	Retired	L9997 Sitting Rock	\$0.00	●	●	
	Alexander	Adolpho	L9997 Sitting Rock	WD0326683	Inactive	Retired	L9997 Sitting Rock	\$0.00	●	●	
	Allen	Harold	L9997 Sitting Rock	WD1363795	Inactive	Retired	L9997 Sitting Rock	\$0.00	●	●	
	Alt	Christopher	L9997 Sitting Rock	WD1195842	Inactive	Retired	L9997 Sitting Rock	\$0.00	●	●	
	Alvarez	Robert	L9997 Sitting Rock	WD1250028	Inactive	Retired	L9997 Sitting Rock	\$0.00	●	●	
	Anderegg	Richard	L9997 Sitting Rock	WD1071922	Inactive	Retired	L9997 Sitting Rock	\$0.00	●	●	

100 items per page 1 - 100 of 407 records

Filters Applied

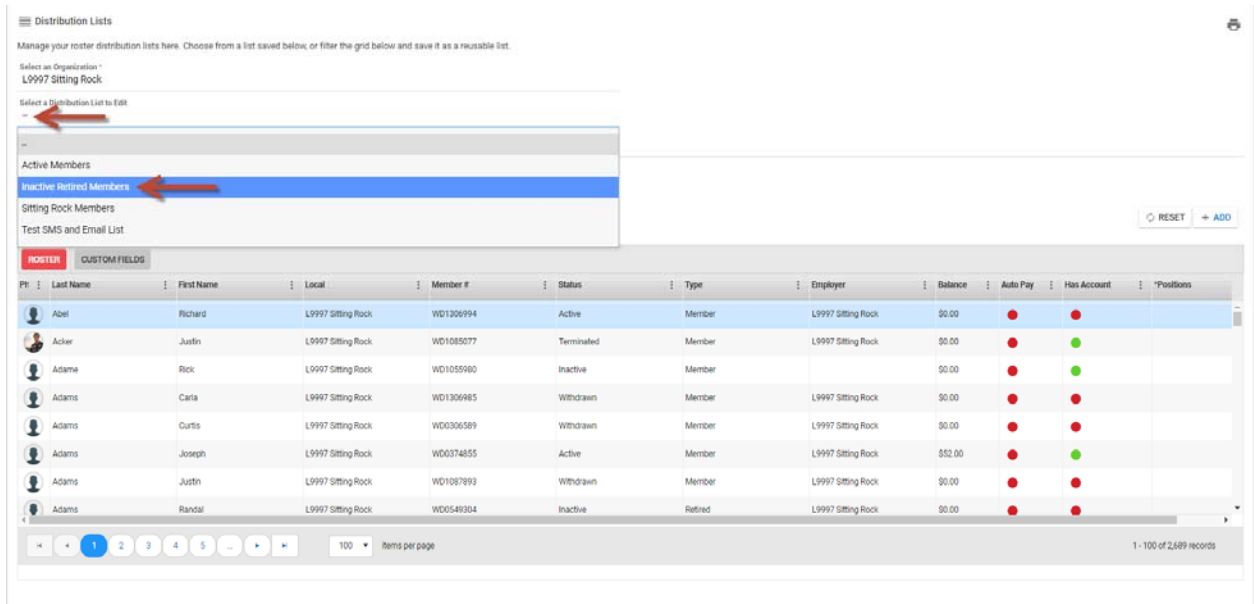
Roster Status (equals) Inactive

Roster Type (equals) Retired

CLEAR

As stated earlier, a “Distribution List” is dynamic so, it will always contain any members that match the criteria (filters) that you specified. So, for our example, if any member is subsequently set to a status of “Inactive” and a type of “Retired”, they will automatically be added to this list. Conversely, if there is a member on the list whose status changes from “Inactive” to “Active”, they will automatically be removed from the list.

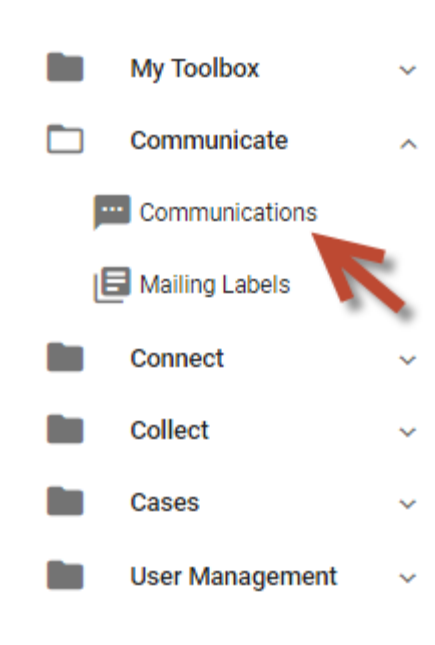
6. Once you have created a “Distribution List”, you can always edit it (make changes to the criteria) via the “Distribution Lists” page. To do so, click the dash line under the field labeled “Select a Distribution List to Edit”. This will display a menu of all the lists that you have previously configured...choose the list you wish to edit from the menu. You can then change any of the filters that you have set for any of the columns on the roster:



The screenshot shows the 'Distribution Lists' interface. At the top, there's a header 'Distribution Lists' and a sub-header 'Manage your roster distribution lists here. Choose from a list saved below, or filter the grid below and save it as a reusable list.' Below this, there's a dropdown menu for 'Select an Organization' with 'L9997 Sitting Rock' selected. Another dropdown menu for 'Select a Distribution List to Edit' is open, showing options: 'Active Members', 'Inactive Retired Members' (highlighted with a red arrow), 'Sitting Rock Members', and 'Test SMS and Email List'. Below the menu is a 'ROSTER' tab and a 'CUSTOM FIELDS' tab. The roster table has columns: 'Pr', 'Last Name', 'First Name', 'Local', 'Member #', 'Status', 'Type', 'Employer', 'Balance', 'Auto Pay', 'Has Account', and 'Positions'. The table contains 8 rows of member data. At the bottom, there's a pagination bar showing '1' of 100 items per page, and a total of '1 - 100 of 2,689 records'.

Pr	Last Name	First Name	Local	Member #	Status	Type	Employer	Balance	Auto Pay	Has Account	Positions
	Abel	Richard	L9997 Sitting Rock	WD1306994	Active	Member	L9997 Sitting Rock	\$0.00	●	●	
	Acker	Justin	L9997 Sitting Rock	WD1085077	Terminated	Member	L9997 Sitting Rock	\$0.00	●	●	
	Adams	Rick	L9997 Sitting Rock	WD1055980	Inactive	Member	L9997 Sitting Rock	\$0.00	●	●	
	Adams	Carla	L9997 Sitting Rock	WD1306985	Withdrawn	Member	L9997 Sitting Rock	\$0.00	●	●	
	Adams	Curtis	L9997 Sitting Rock	WD0306589	Withdrawn	Member	L9997 Sitting Rock	\$0.00	●	●	
	Adams	Joseph	L9997 Sitting Rock	WD0374855	Active	Member	L9997 Sitting Rock	\$52.00	●	●	
	Adams	Justin	L9997 Sitting Rock	WD1087893	Withdrawn	Member	L9997 Sitting Rock	\$0.00	●	●	
	Adams	Randal	L9997 Sitting Rock	WD0549304	Inactive	Retired	L9997 Sitting Rock	\$0.00	●	●	

7. You could now use your new “Distribution List” to send communications to the members that it contains. For example, go to the “Communications” module by choosing it under the “Communicate” option on the left-hand side of the screen and, once there, click the “Create” button:



The screenshot shows a left-hand navigation menu with several categories: 'My Toolbox', 'Communicate', 'Connect', 'Collect', 'Cases', and 'User Management'. Under the 'Communicate' category, there are two sub-items: 'Communications' and 'Mailing Labels'. A red arrow points to the 'Communications' sub-item.

8. This will open the “New Communication” window via which you can configure the email, text message or survey you wish to send. Under the “Distribution List” field, you can choose from any of your previously configured distribution lists....the members on the list you choose will be the recipients for the communication that you wish to send:

New Communication
6/14/2018 4:22:59 PM

Draft Total Sent: 0

DETAILS CONTENT RECIPIENTS STATS

Channels

☒ Email

☐ Text Message

☐ Survey

Title *
New Communication

Distribution List

- Active Members (Dynamic)
- Inactive Retired Members (Dynamic)
- Legislative Issues (Opt-In)
- Newsletter (Opt-In)
- Opioid Crisis (Opt-In)

If you need any further assistance with either configuring or using Distribution Lists on the SMART platform, please contact the UnionTrack Help Desk at 301-685-6199 or support@uniontrack.com.