Getting Started in Fireside21

Everyone here at Fireside21 is excited to be working with you and your office. Our Fireside CRM (Constituent Relationship Management) software will be a tool your entire staff will use each and every day to:

- Keep track of constituents
- Manage legislative mail
- Organize agency casework
- Send email newsletters
- Manage your website

All of your staff should follow the steps of this Quick Start Guide and then plan to set up a phone or in-office training session. Anyone on your team can download this Guide at fireside21.com/quickstart

Should you need help at any point, we recommend using our chat feature at the bottom right hand corner of your account screen. Simply click the "Chat with us" button and ask your question! We can also be reached by phone at (202) 621-5121, or by email at help@fireside21.com.

Okay, let's get started!

Step 1 - Activate Your Account

The Fireside CRM is completely web-based, so you will sign in to your account using an Internet browser such as Internet Explorer, Safari, Firefox, or Chrome. We recommend IE because of a nice feature related to editing Word documents.

You will receive an email from Fireside21 that prompts you to Activate Your Account by setting a password. Once you've set your password, you can login to Fireside21.

In your favorite browser, go to your account URL and sign in with these credentials.

URL	https://MemberFirstLastName.emanager.house.gov/ ex: https://franklinroosevelt.emanager.house.gov	

User Name	Your @mail.house.gov email address
Password	password you set from the activation email

If you have any trouble signing in, click the "Chat with us" button immediately.

If using IE, we recommend making settings changes after accessing your sign-in screen. (Instructions to do so can be found on our tutorials page: help.fireside21.com).

Now that you are in your Fireside CRM account, let's take a quick look around. At the top of the page, you will see a drop-down navigation bar that allows you to navigate your account. At the far right there is a link to get help.

Having trouble finding or signing in to your account? Jump into our support chat by clicking the "Chat with us" button in the bottom righthand corner of your screen. One of our Account Team members will be happy to assist you!

Step 2 - Navigating the Fireside CRM

It is easy to find what you are looking for inside of Fireside CRM because it is organized into different applications: People, Casework, and Mail Room are used for the CRM platform. Depending on your account settings and user permissions, you will see a combination of these applications in the Fireside CRM navigation.

The applications are all displayed in the navigation bar. Each drop down is filled with pages unique to that application. Try clicking through the pages and applications. You will notice how easy it is to change from application to application and page to page.

People Overview

This application is where all of the people in Fireside CRM are stored. The primary pages of People allow you to search for and add constituents to the system, customize the fields of the database, create audiences and import email lists.

The People application also has tools to help find and merge duplicates and household members. Finally, the People application is the first place to go when logging in letters,

emails, cases and phone calls.

All of these topics will be covered in depth during your training session.

Mail Room Overview

This application is where legislative mail is stored in Fireside CRM. The "My Mail" page keeps mail organized so you can see what mail has been assigned to you for response. The other primary pages include your email inbox, form letter library, batched mail, logging templates, search for specific mail and bulk outbound mail.

All of these topics will be covered in depth during another training session.

Casework Overview

This application is where all of your constituent case requests are stored. Unlike legislative mail, Fireside CRM's casework tools allow for multiple interactions and correspondence to occur between your staff, constituents and agency contacts. All of these activities, plus all of your notes and reminders are organized within the "My Cases" page.

Step 3 - Search / Find People

In the People drop down, there is a Search page. You will most commonly search a first and last name, but you can also include an address (partial or full), email address, phone number or other information to narrow your results.

Try searching for **Franklin Roosevelt**. Did you find him? You will note that Franklin is flagged as DC-00. You will see that "out of district" flag throughout your account and will be warned whenever you attempt to add a person to your Fireside CRM account who resides outside of your Congressional district.

From the Search results screen, let's take a close look at Franklin's profile by clicking his name. From this screen you can see a snapshot of Franklin's contact information and a summary of all of the interactions your office has had with Frank: Correspondence, Cases, Targeted Emails, Website Surveys and Telephone Townhalls.

Feel free to click around the Contact, Profile and Relationships tabs or make changes to Franklin's information. We'll use this person to test out more of the Fireside CRM tools later.

*Having trouble finding people? Just click the **"Chat with us"** button!*

Step 4 - Add New People

Your constituent database will greatly assist you in targeted outreach and save you some time from data entry. That said, you will receive calls, emails and letters from constituents who are not already in your Fireside CRM account.

To add new people to your system, follow the instructions below. We recommend adding yourself, perhaps your home address and personal email account (don't use your House email account).

1. Select "Add a Person" in the "People" drop down.
2. Fill in all the prefix, first and last name, email address and address information. You will be able to add more information on the next step. Click "Save."

How did that go? You are doing great! Let's move on to Step 5 so you know how to log all those calls your office is receiving from your constituents.

*Having trouble adding people? Just click the **"Chat with us"** button!*

Step 5 - Log Phone Calls

Your staff needs to talk internally and make a couple of decisions about how you want to handle the calls, emails and letters you receive during your first couple of weeks using our platform. It is going to be hard to draft letters on every topic, but over time, you will build up a vast form letter library.

In the meantime, and especially during your first week, your goal should be to capture

as much constituent personal information as possible. **Be sure to ask every caller if they would like to receive email updates from your office.** That verbal authorization satisfies House rules related to opt-in "blackout" email messaging.

Try using the Franklin Roosevelt or person you added in Step 4 to test out logging a call.

1. Select "Search" from the "People" drop down.
2. Enter the constituent's name (Franklin Roosevelt or person you added in Step 4).
3. Click the constituent's name (blue link).
4. Click "Log a Call" in the top right corner of the page.
5. The Inbound Details will be in the center of the page. You can select a different Inbound Type (letter, email, fax). Add Notes from the call or add a document.
6. On the right sidebar there are Logging Options. This is where you choose if they'd like a response or not. If they do not want a response, uncheck the box and click "Save."
7. If they want a response, fill in the fields on the right side.
   a. **Staff:** This is the person who will be responsible for responding to this person.
   b. **Reply with:** How your office will be responding; either a letter, email or call.
   c. **Form:** This is the generic response letter for that topic (you can select the Blank Letter as a holding place until a Form Letter is written). Start typing in the name and a drop down will appear.
   d. **Batch:** Put the letter into a batch with other correspondences receiving the same Form Letter.
   e. **Issues:** You can tag the correspondence with a specific issue by typing the issue and selecting it from the drop down. Make sure to press the "+" button to add the issue.
   f. **Affiliations:** You can tag the correspondence with a specific affiliation by typing the affiliation and selecting it from the drop down. Make sure to press the "+" button to add the affiliation.
   g. **Legislation:** You can tag the correspondence with a specific bill (same as affiliation and issue).

*Do you have questions about logging calls or other activities into Fireside CRM? Just click the **"Chat with us"** button!*

Step 6 - Sign Up for A Training

Now that you have completed all the steps of our tutorial, you are ready for an in-depth training session. See the training calendar on your Fireside home screen (the page after you log in to your account) for details! You can also visit fireside21.com/freshmantraining

○ **Mail Room Training** (CRM Clients)

Who: **DC staff members** who handle the office's constituent correspondence.

Covers: Searching for people, logging mail, batches, using Issue and Affiliation codes, editing letters, sending emails, creating form letters, mail reports and much more!

○ **Casework Training** (CRM Clients)

Who: **District staff members** who assist constituents with Federal agencies.

Covers: Searching for people, starting cases, editing letters, sending emails, creating form letters, Agencies, casework reports and much more!

○ **Web Site / E-Newsletter Training** (Web & E-News Clients)

Who: **Any staff** who post press releases, edit the website or work on the e-newsletter.

Covers: Creating Audiences, posting press releases, promoting on social media, adding files and photos, editing web pages and e-newsletter basics.

Still not sure which training is right for you? Email us!