



# LEVELS OF SUBSTACK

*A tour for family historians*

*Let's learn together. More in the 3-part series on  
Substack + Family History*

- [projectkin.substack.com/s/substack-family-history](https://projectkin.substack.com/s/substack-family-history)



# TUTORIAL & TOUR

- *Terminology: Who's who*
- *Publications & posts*
- *Chat, notes & comments*

*An actual walk through*

- High-level: “It’s a newsletter”
  - As a **NEWSLETTER** it handles email and the **email list...**
  - ... Plus a **BLOG**, so web accessible
  - ... Plus a **PAYMENTS engine**
  - ... Plus a **user RECOMMENDATIONS engine**
  - and, all of that at **scale.**

## Allow me to define terms

- **NEWSLETTER:** Email, subscription lists,
- **BLOG:** Web-accessible posts, (opt.) authentication
- **PAYMENTS:** Transactions, refunds, etc.
- **RECOMMENDATIONS:** Referrals, traffic generation

- **WHY that matters**
  - Unlike **Facebook**, it's not ad-supported.
  - Unlike **Medium**, payment is distributed.
  - Unlike **WordPress** (etc.) it's automated.
  - **AND** it's **FREE** to me – and you!
    - IF I charge, then I owe 10% to Substack.

# A level deeper: Follow the flow

A visit to [projectkin.substack.com](https://projectkin.substack.com)



The image shows a screenshot of the Project Kin Forum website. A stylized illustration of a person with short dark hair is positioned in the center, holding a laptop. To the left of the person is a callout box with an orange background. The callout box contains the text "TAPS" in large white letters, followed by "Let me explore first... >" in white. An arrow points from this text to a "Let me explore first... >" link on the website's subscription form. The website screenshot shows the Project Kin Forum logo, a navigation menu, a "Welcome to Projectkin" message, and a "Projectkin Community Forum" section with a subscription form and a "SEE ALL" link.

**TAPS**  
“Let me explore first... >”

PROJECT KIN FORUM  
A community of family historians  
HOOKED on STORIES

Projectkin Community Forum  
A community of family historians hooked on stories.  
Join us for free events, conversation, and tools.

Type your email...

Let me explore first... >

Home About Events Project Recipes + Ideas Tips, Tech + Tools Essential Elements Members' Chat Room

Subscribe Sign in

Welcome to Projectkin  
This is the best place to get started. We'll focus first on our online events are how we come together as a community. They are open to everyone, though...

NOV 25 · BARBARA TIEN

SEE ALL

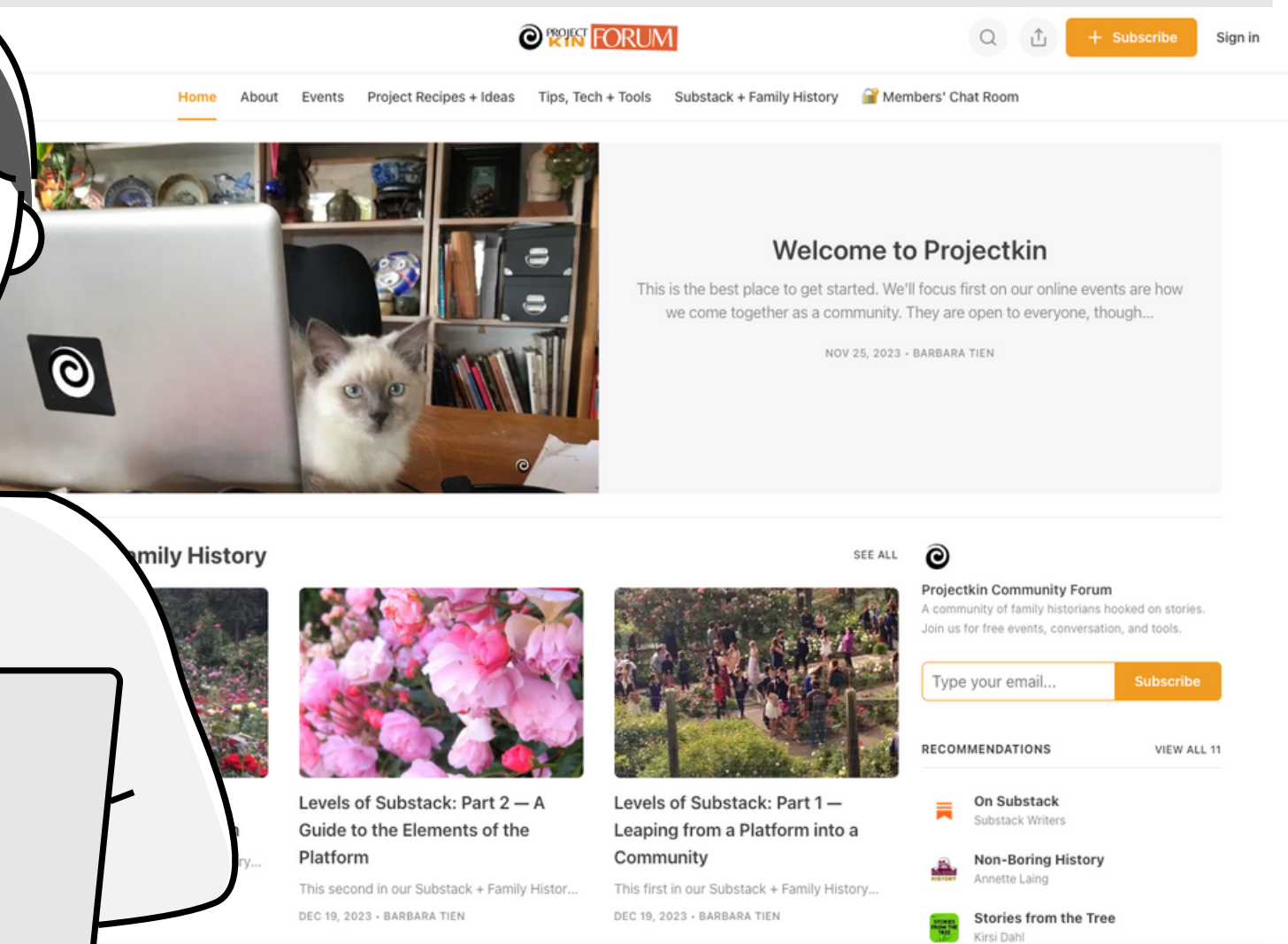
Projectkin Community Forum  
A community of family historians hooked on stories. Join us for free events, conversation, and tools.

Type your email...

## A level deeper: Follow the flow

A visit to [projectkin.substack.com](https://projectkin.substack.com)

They are a **FREE VISITOR**,  
anonymous to Projectkin logs.  
They're able to read any link  
they like. (Just like a web page)



The screenshot shows the Projectkin website interface. At the top, there is a navigation bar with links for Home, About, Events, Project Recipes + Ideas, Tips, Tech + Tools, Substack + Family History, and Members' Chat Room. A search bar and a 'Subscribe' button are also visible. The main content area features a 'Welcome to Projectkin' message, followed by a section titled 'Family History' with several article thumbnails. The articles include 'Levels of Substack: Part 2 — A Guide to the Elements of the Platform' and 'Levels of Substack: Part 1 — Leaping from a Platform into a Community'. A sidebar on the right contains a 'Projectkin Community Forum' section with a search bar and a 'Subscribe' button, and a 'RECOMMENDATIONS' section with links to 'On Substack Substack Writers', 'Non-Boring History' by Annette Laing, and 'Stories from the Tree' by Kirsi Dahl.

# A level deeper: Follow the flow

IF they add their email ...

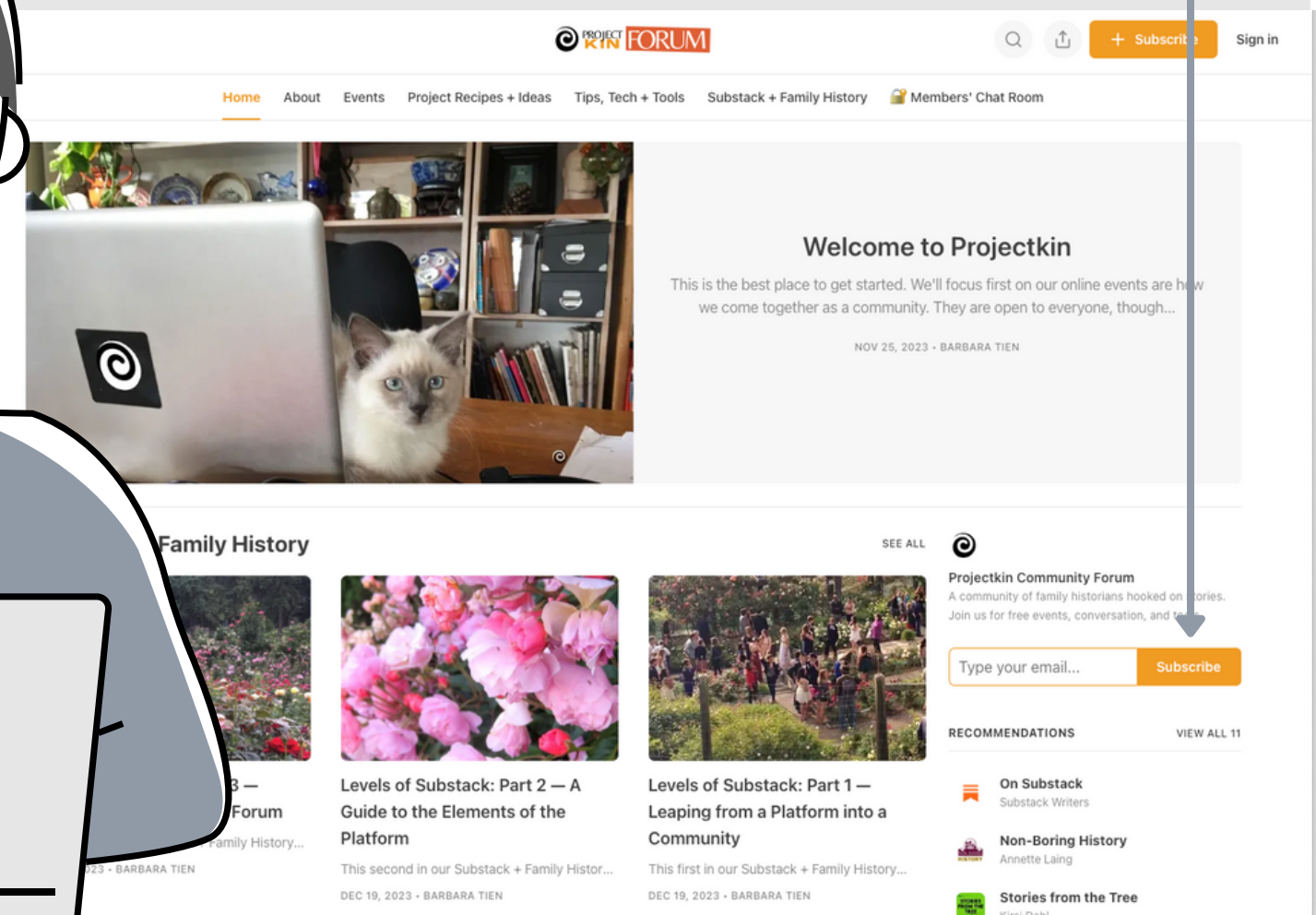
They are a **FREE READER**, now identified. They're able to also...

- View public posts
- Share posts on the web
- Receive posts via email

[Like a newsletter, rec'd via email]



TAP “Subscribe”





# A level deeper: Follow the flow

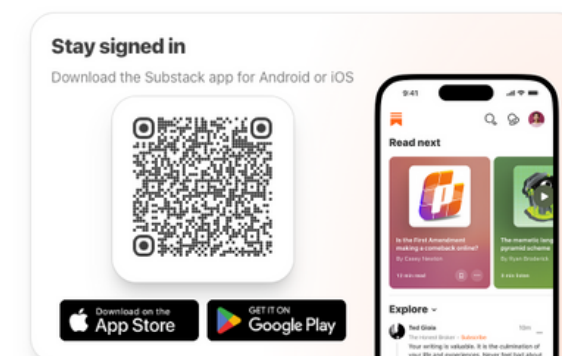
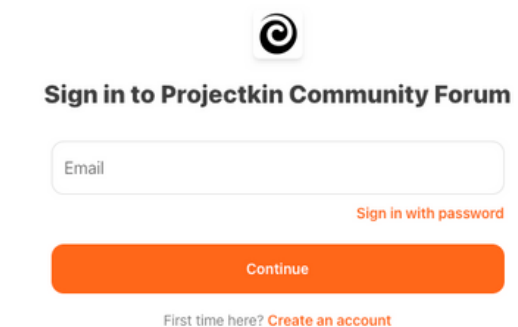
**[Tricky part] IF they then sign in**

**They are a WRITER (still free), adds...**

- Full Forum Access on App or Web
- Adds comments to posts
- Can share video posts as clips
- Share posts to notes (stack/re-stack)
- Adds replies to notes
- Adds to chat threads
- Write their own publication!



## Sign in



**Note Options:**

- w/o password
  - password
- OR, use app

## A level deeper: Follow the flow

Don't over-think it

### Web Options

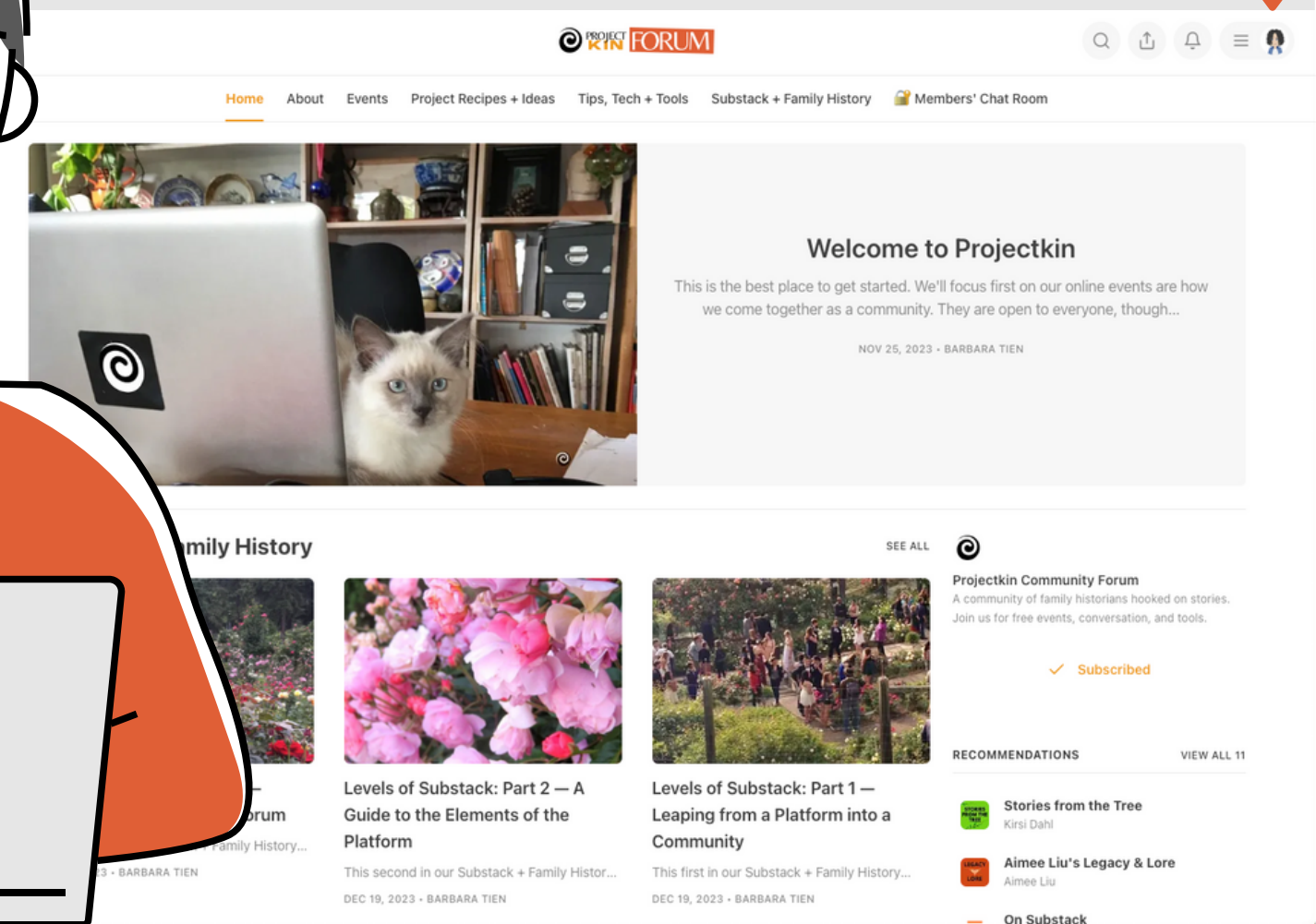
- Using email only:
  - Substack emails a link
- Create a password:
  - Like any other site

### App

- Doesn't require a password



Signed in

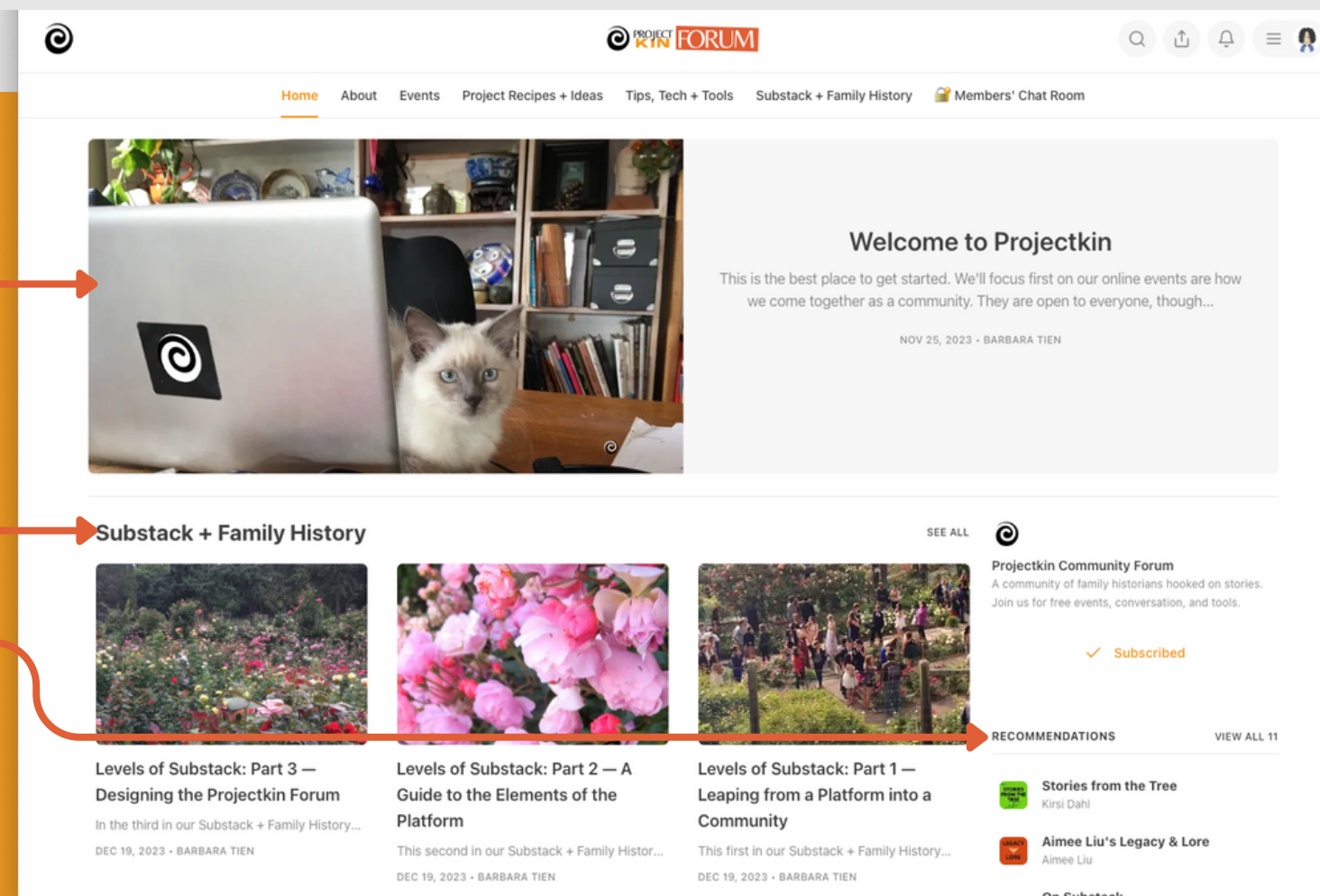


# Every visitor to the Projectkin Forum...

Can explore the substack (aka “stack”)

A substack is simply a collection of ...

- articles
- sections (topics)
- recommendations



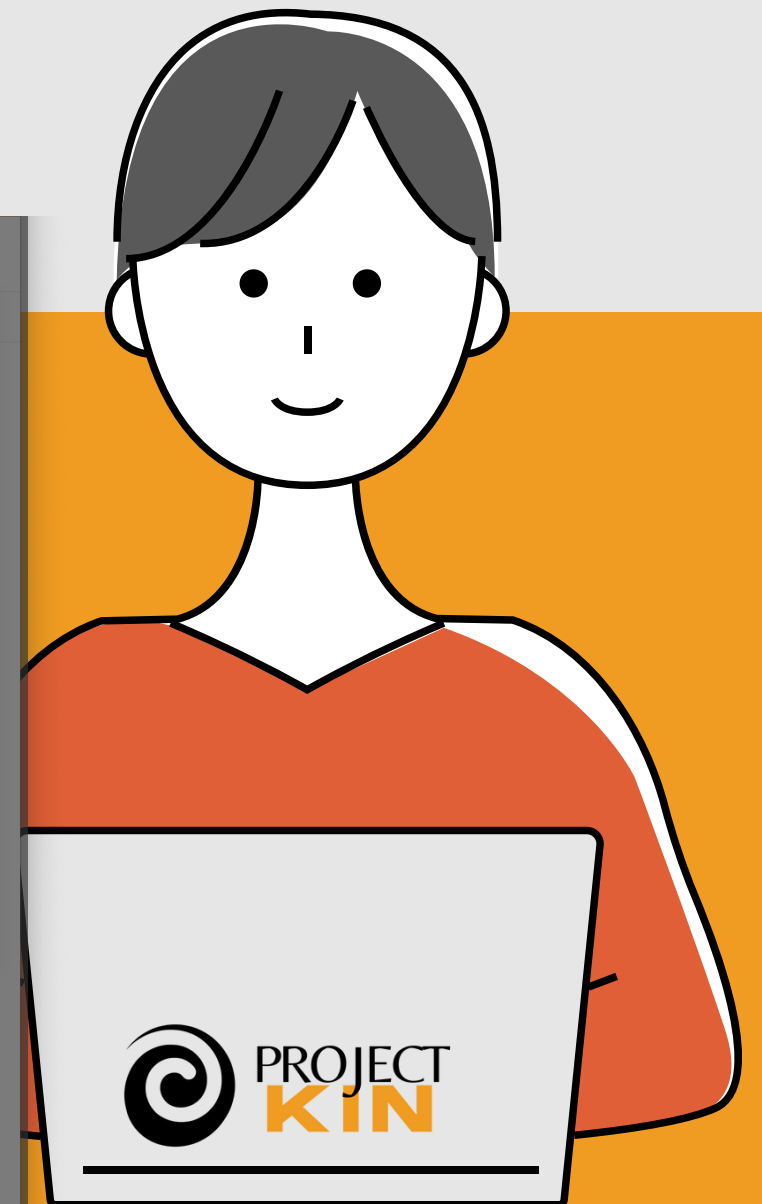
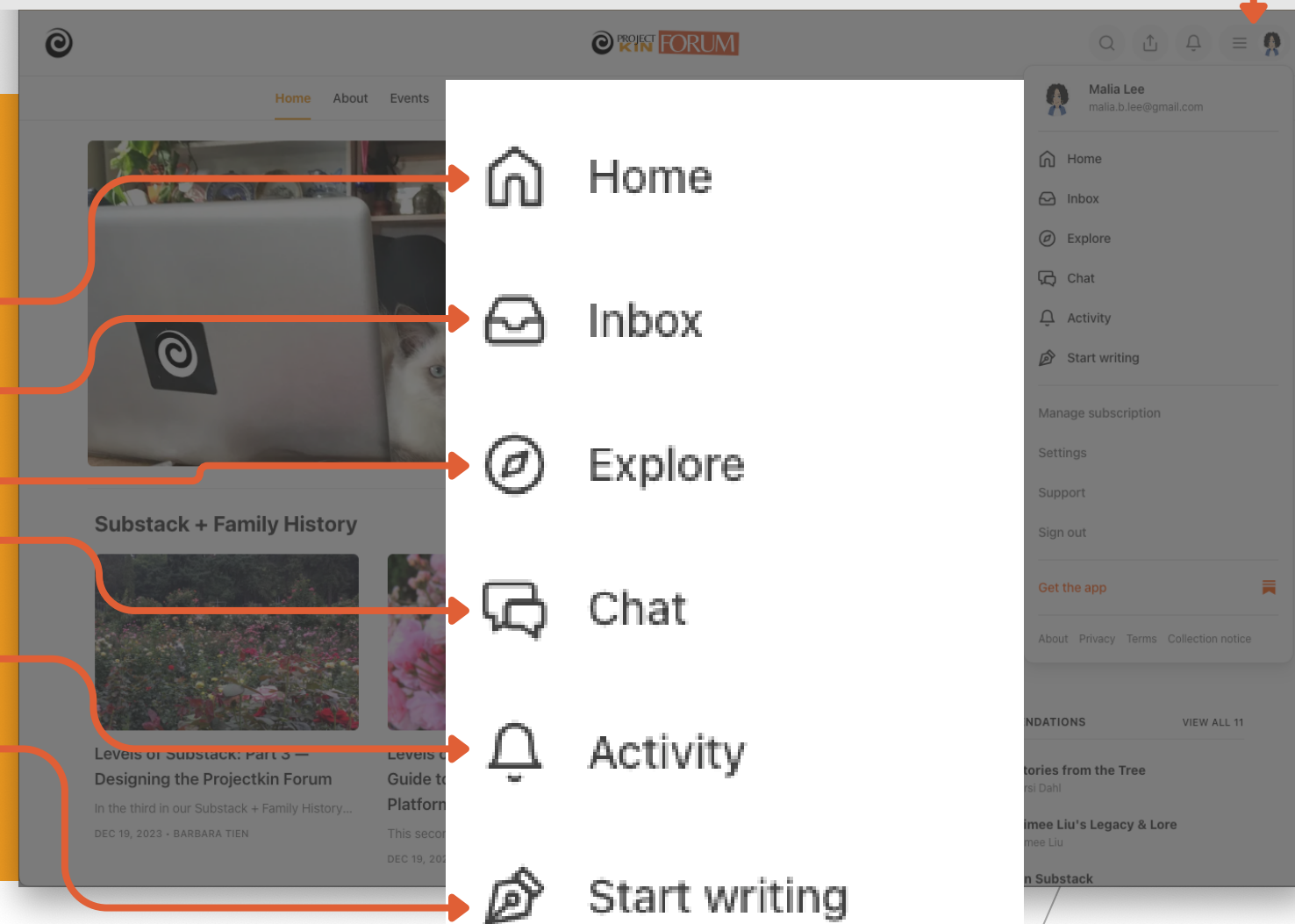
# Once you're in ...

Since you have an account, you have menu access to Substack controls ...

This is true in the mobile app too, we're skipping that for brevity.

### Explore other Substacks

- **Home:** Notes & all you follow
- **Inbox:** All new posts you follow
- **Explore:** Interest-based posts
- **Chat:** All subscribed-stack chats
- **Activity:** New posts, mentions
- **Start Writing:** Write a post or create your own publication!

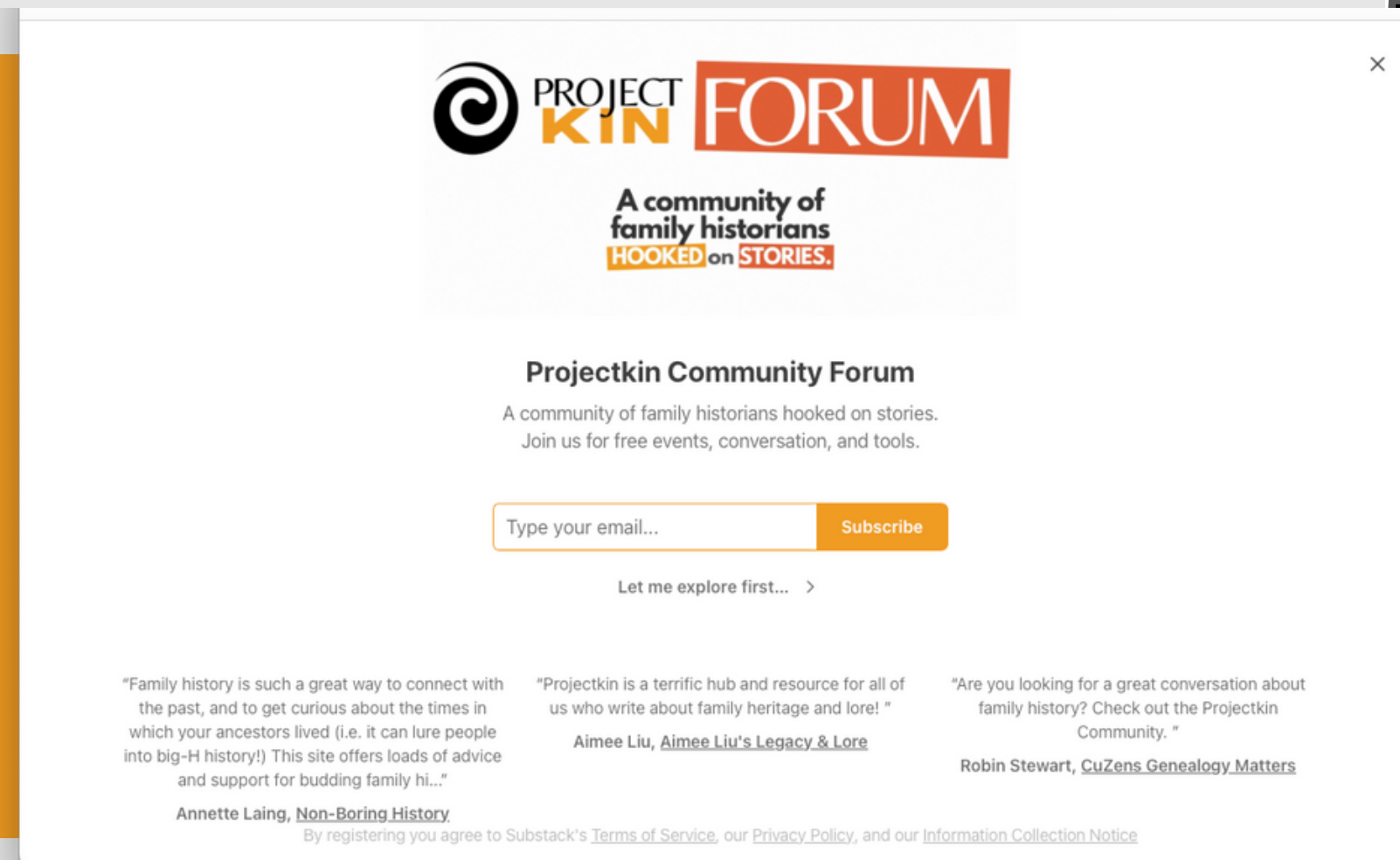


# Let's look back at that "welcome" page

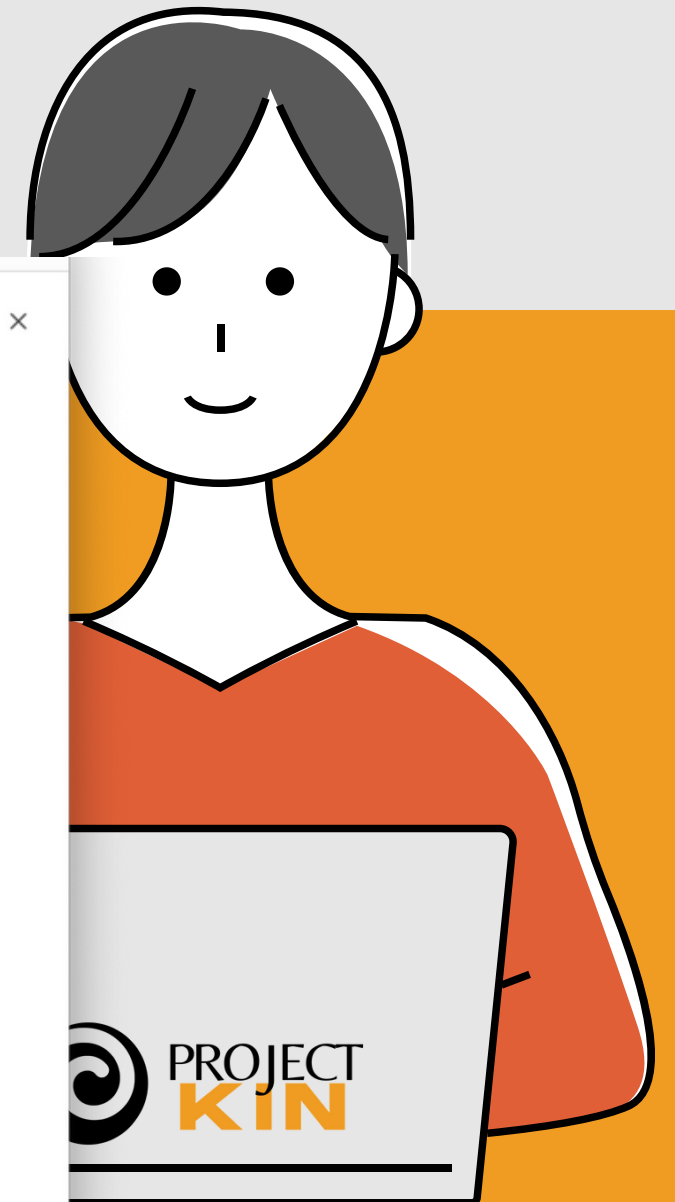
## This might make more sense now

Substack wants you to subscribe  
(Projectkin does too)

- True for every stack.
- Written recommendation "blurbs" are hugely helpful.
- Publication owners control what is paid or free.

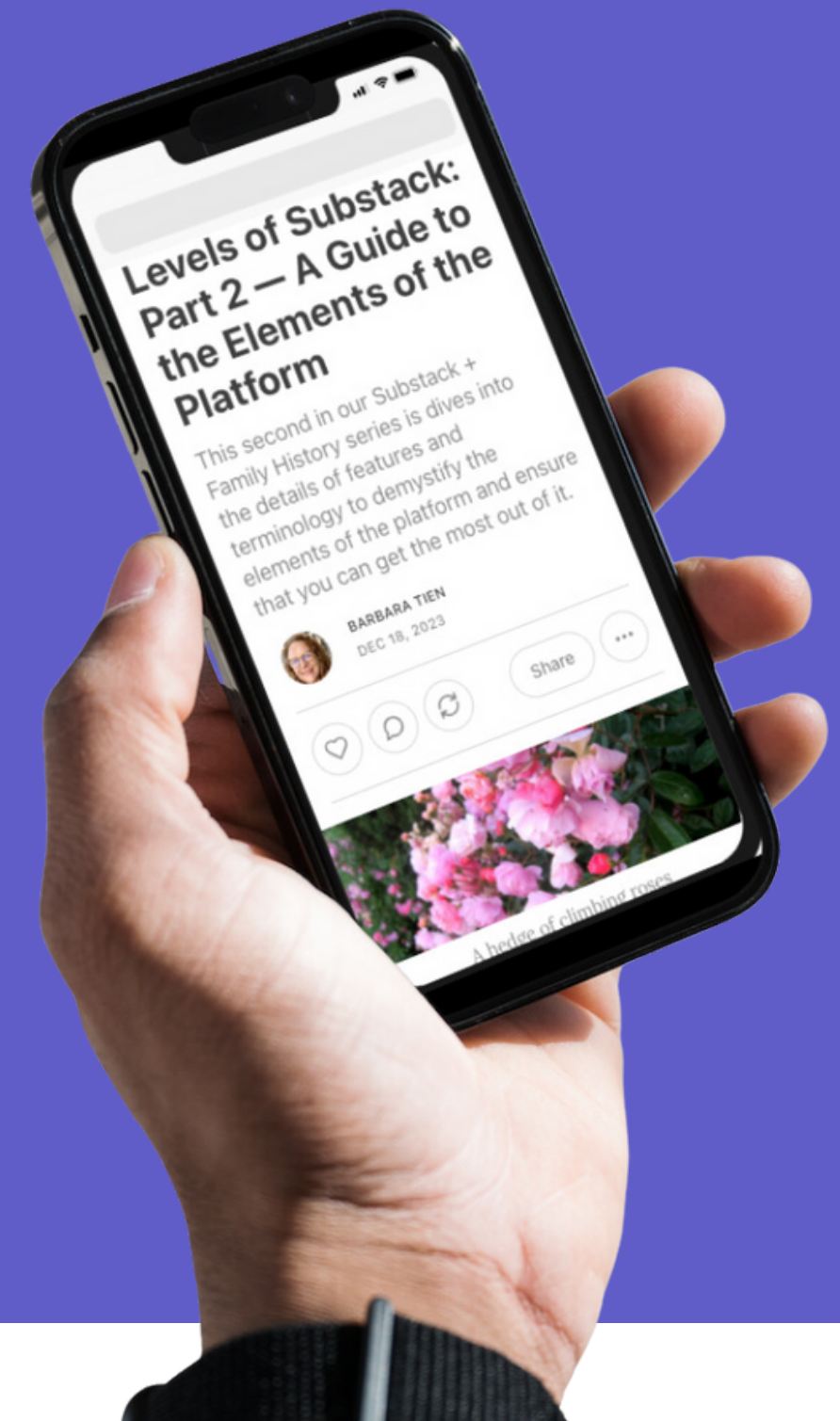


The screenshot shows the Project Kin Forum website. At the top, it features the Project Kin logo and the text "PROJECT KIN FORUM". Below this, it says "A community of family historians HOOKED on STORIES." The main heading is "Projectkin Community Forum" with a subtext: "A community of family historians hooked on stories. Join us for free events, conversation, and tools." There is a subscription form with a text input field "Type your email..." and a "Subscribe" button. Below the form is a link "Let me explore first... >". At the bottom, there are three testimonials from Annette Laing, Aimee Liu, and Robin Stewart, each with their name and a link to their content. A footer note states: "By registering you agree to Substack's Terms of Service, our Privacy Policy, and our Information Collection Notice".



# Pause for a moment: [Demo is coming]

- Basic mechanics of access
  - Questions?
- Core elements of community
  - Posts (video, podcast, articles)
  - Notes
  - Chat



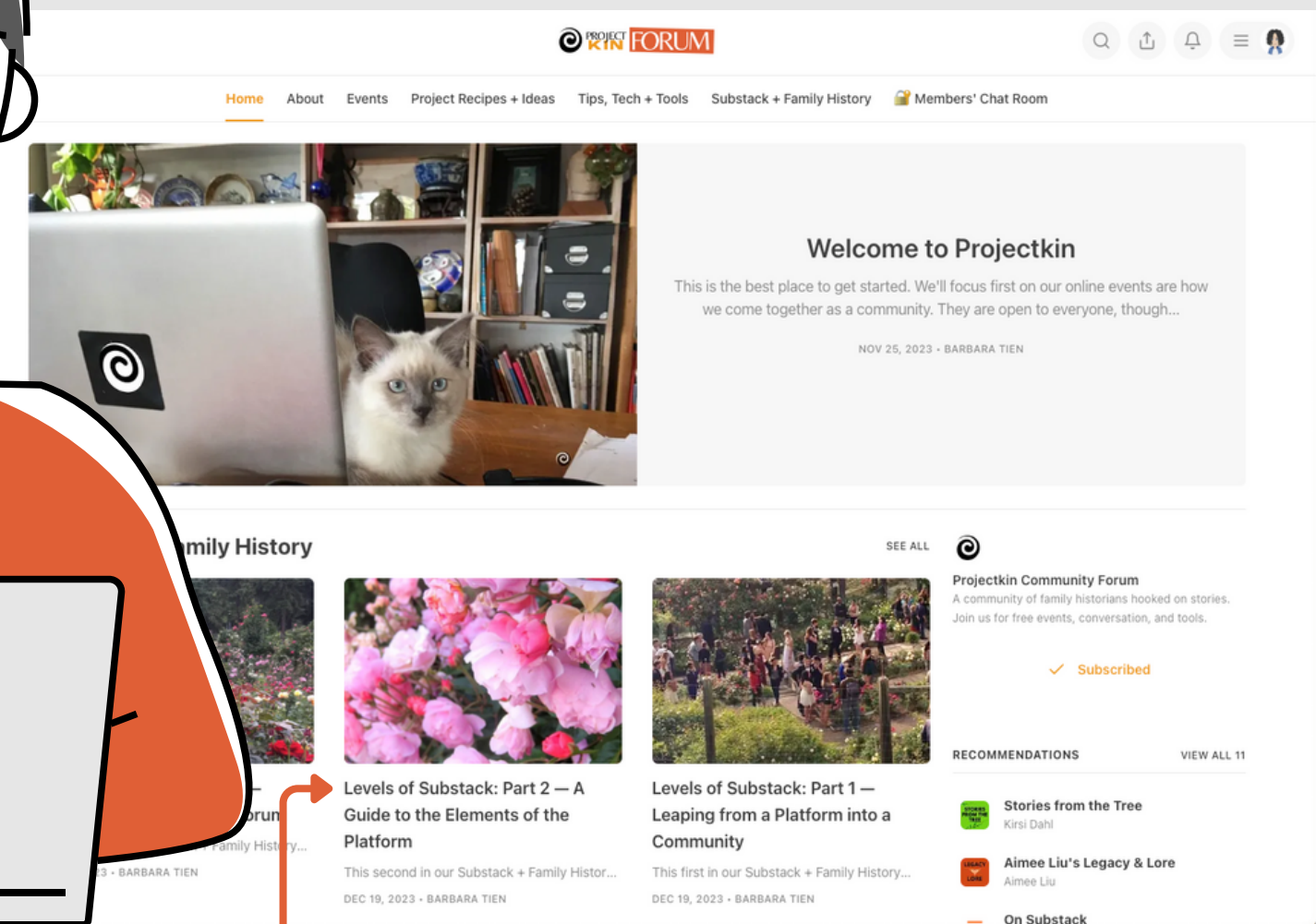
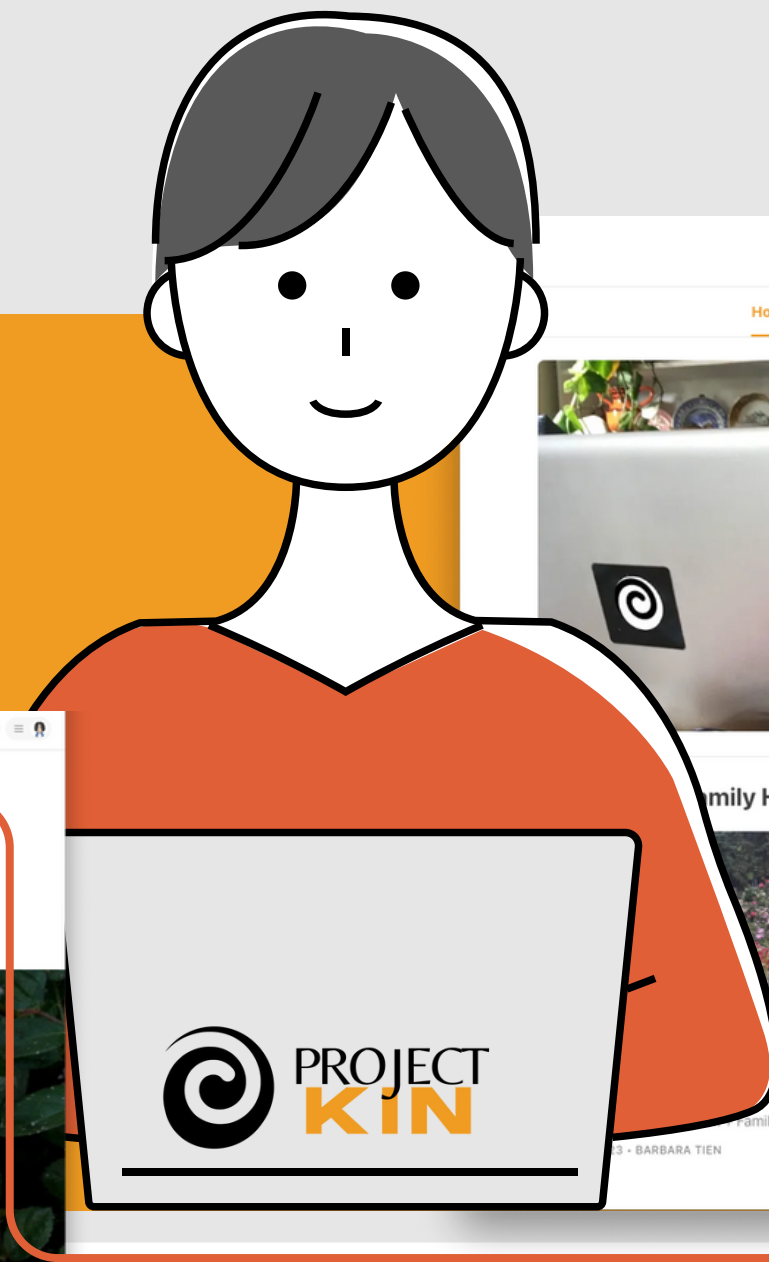
# Core elements of community

## Events, Posts, Notes, & Chat

Posts are obvious, they're articles, (OR...video)

- Access is free, paywalled, or partially paywalled at the discretion of the publication.

(Tip: see this article to learn more.)



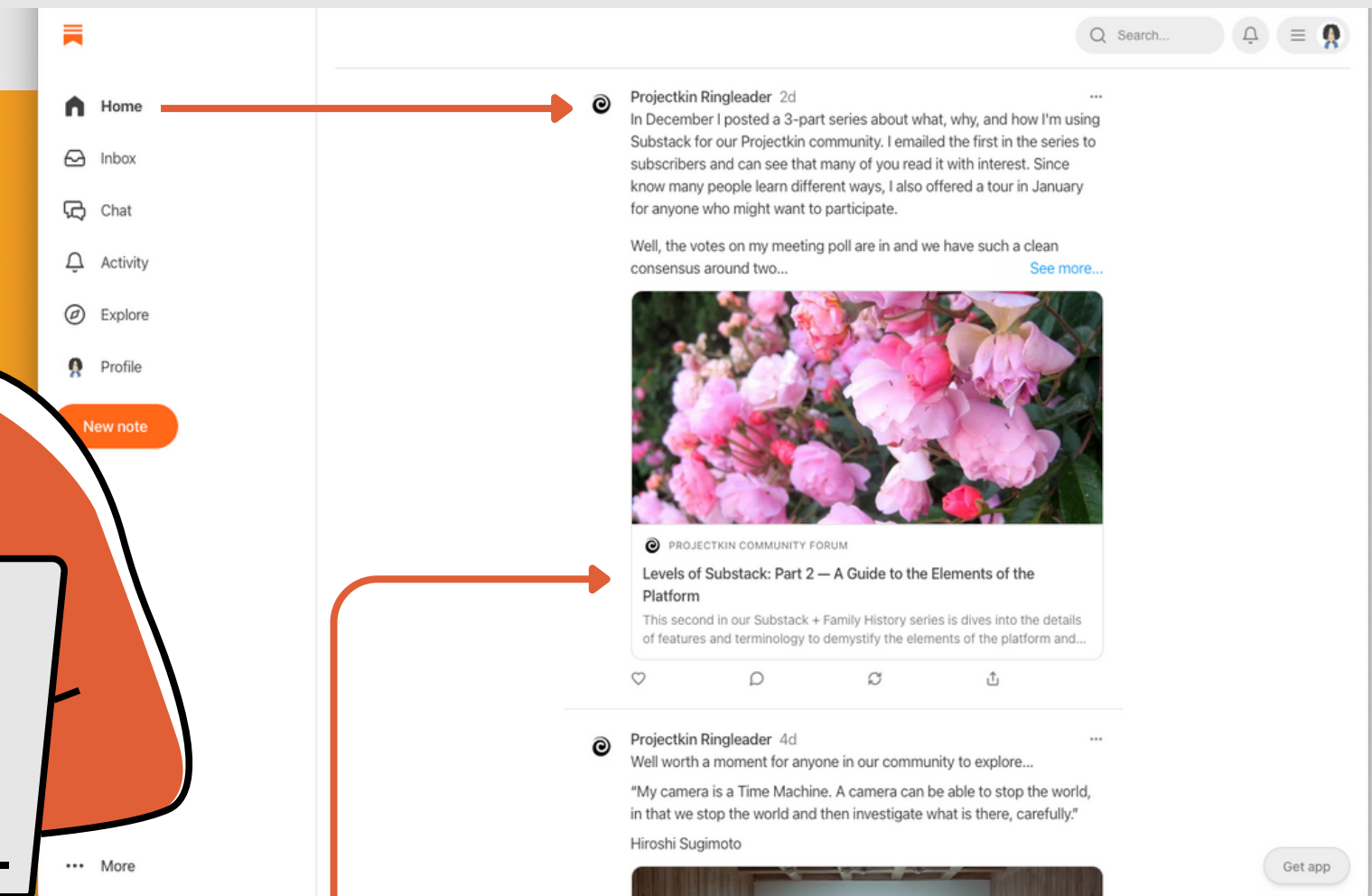
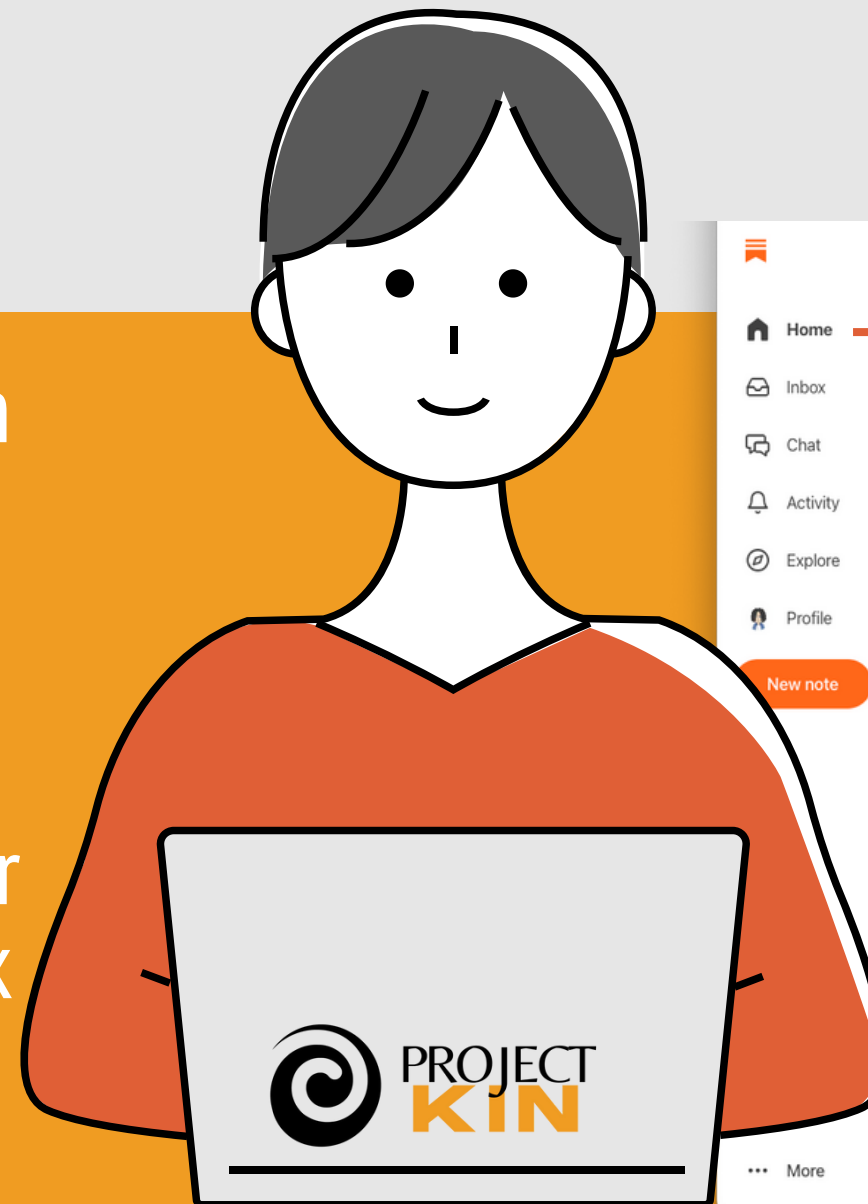
# Core elements of community

## Events, Posts, Notes, & Chat

That same post, shared by the publication owner as a note.

**Notes** are key to sharing and connection

- **Notes** are shared with subscribers OR followers.
- Tap **Home** to see all of your **Notes**
- You can ❤️, comment “re-stack” or share any Note, Post, or even a link external to Substack.





# Core elements of community

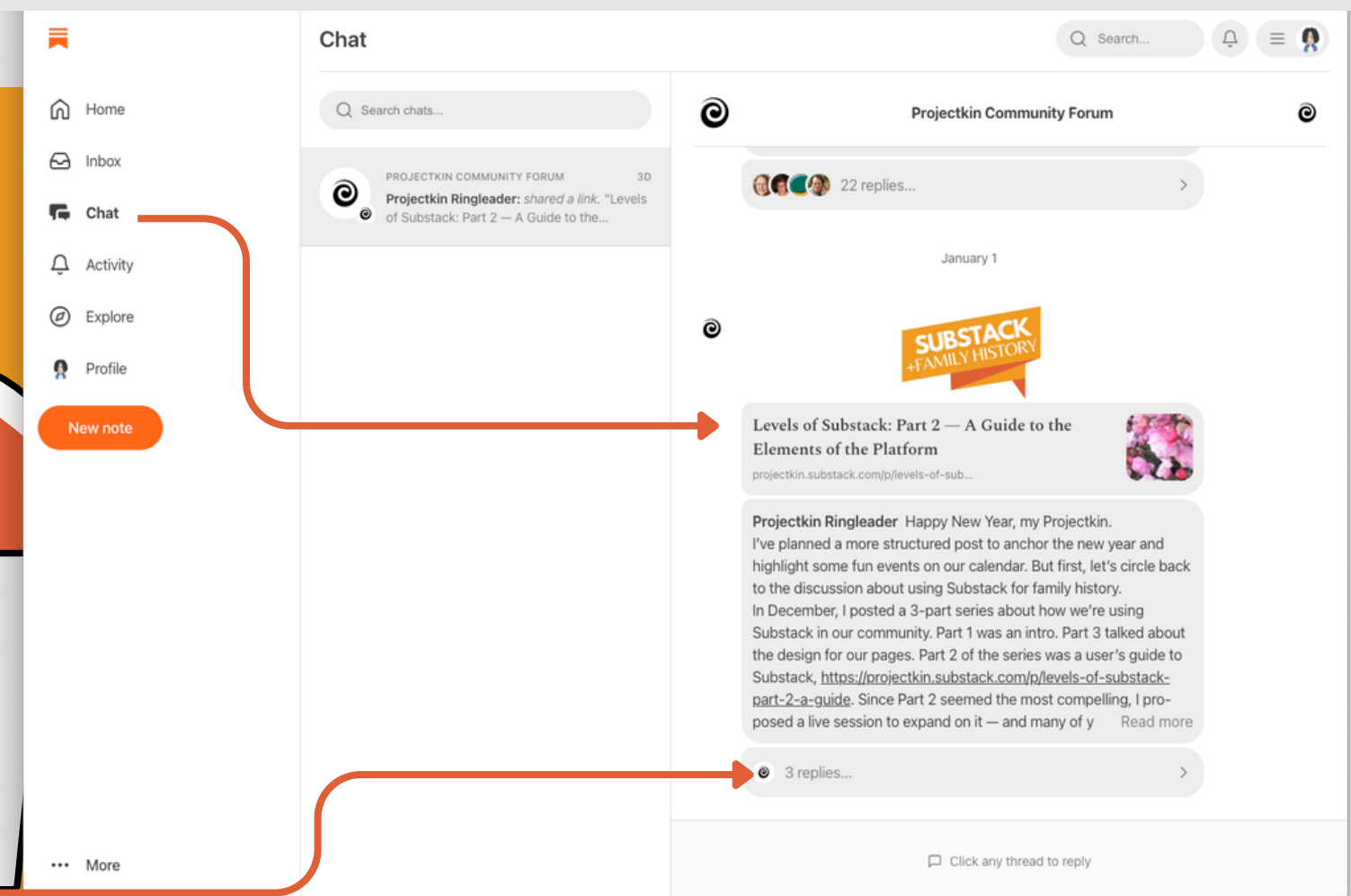
## Events, Posts, Notes, & Chat

**Chat Threads** invite publication subscribers to engage in posts, notes, and conversation

- **Chats** are always restricted to subscribers, sometimes paid only.
- **Subscribers** can reply and add photos, but not start threads (generally).



That same post, shared by the publication owner as the start to a chat thread.



Chat

Search chats...

PROJECTKIN COMMUNITY FORUM 3D

Projectkin Ringleader: shared a link. "Levels of Substack: Part 2 — A Guide to the..."

Home

Inbox

Chat

Activity

Explore

Profile

New note

Projectkin Community Forum

Search...

22 replies...

January 1

**SUBSTACK + FAMILY HISTORY**

Levels of Substack: Part 2 — A Guide to the Elements of the Platform

projectkin.substack.com/p/levels-of-sub...

Projectkin Ringleader Happy New Year, my Projectkin. I've planned a more structured post to anchor the new year and highlight some fun events on our calendar. But first, let's circle back to the discussion about using Substack for family history. In December, I posted a 3-part series about how we're using Substack in our community. Part 1 was an intro. Part 3 talked about the design for our pages. Part 2 of the series was a user's guide to Substack, <https://projectkin.substack.com/p/levels-of-substack-part-2-a-guide>. Since Part 2 seemed the most compelling, I proposed a live session to expand on it — and many of y Read more

3 replies...

Click any thread to reply

## It's not all about Projectkin

### Explore, Support & Recommend

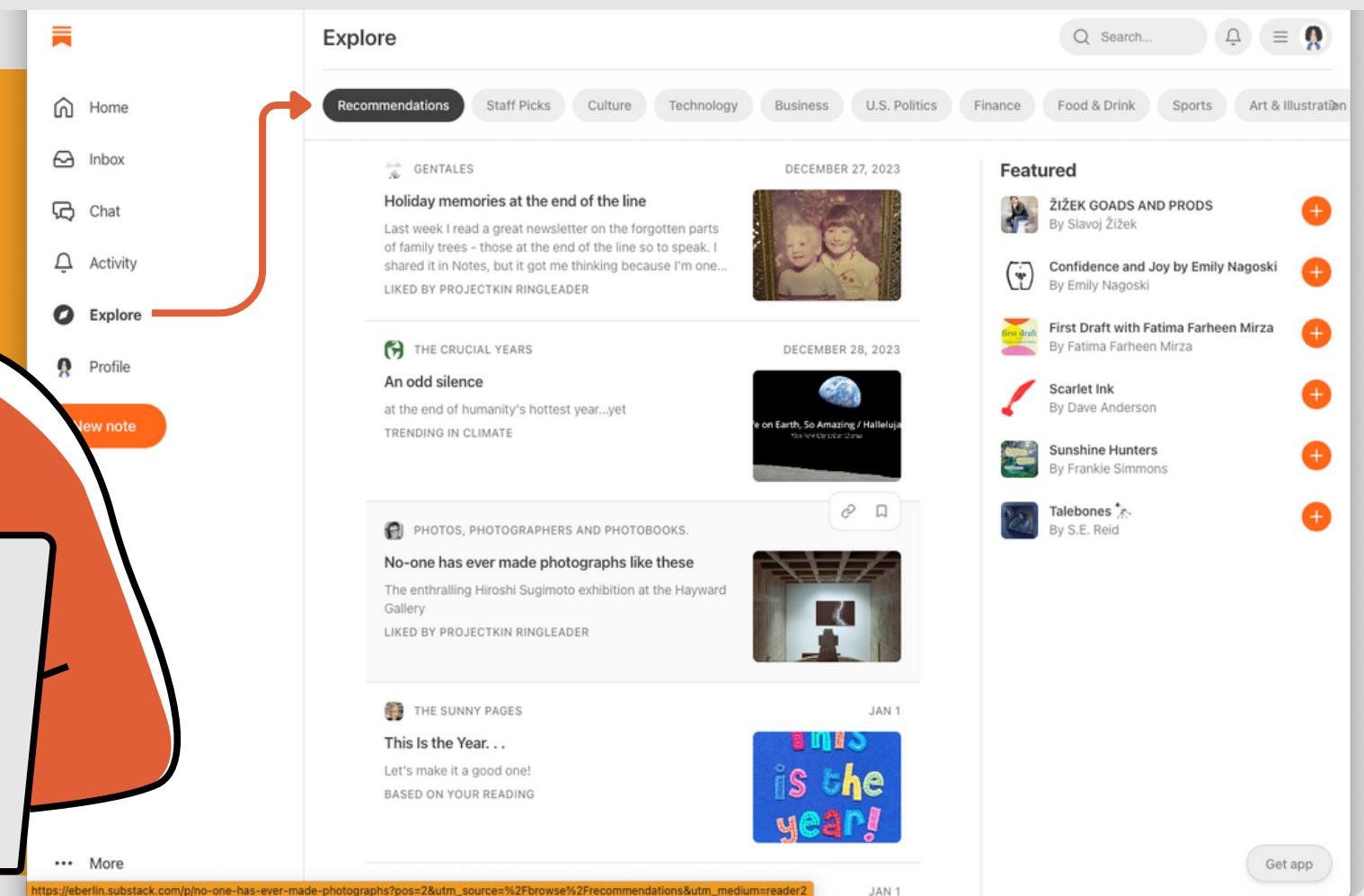
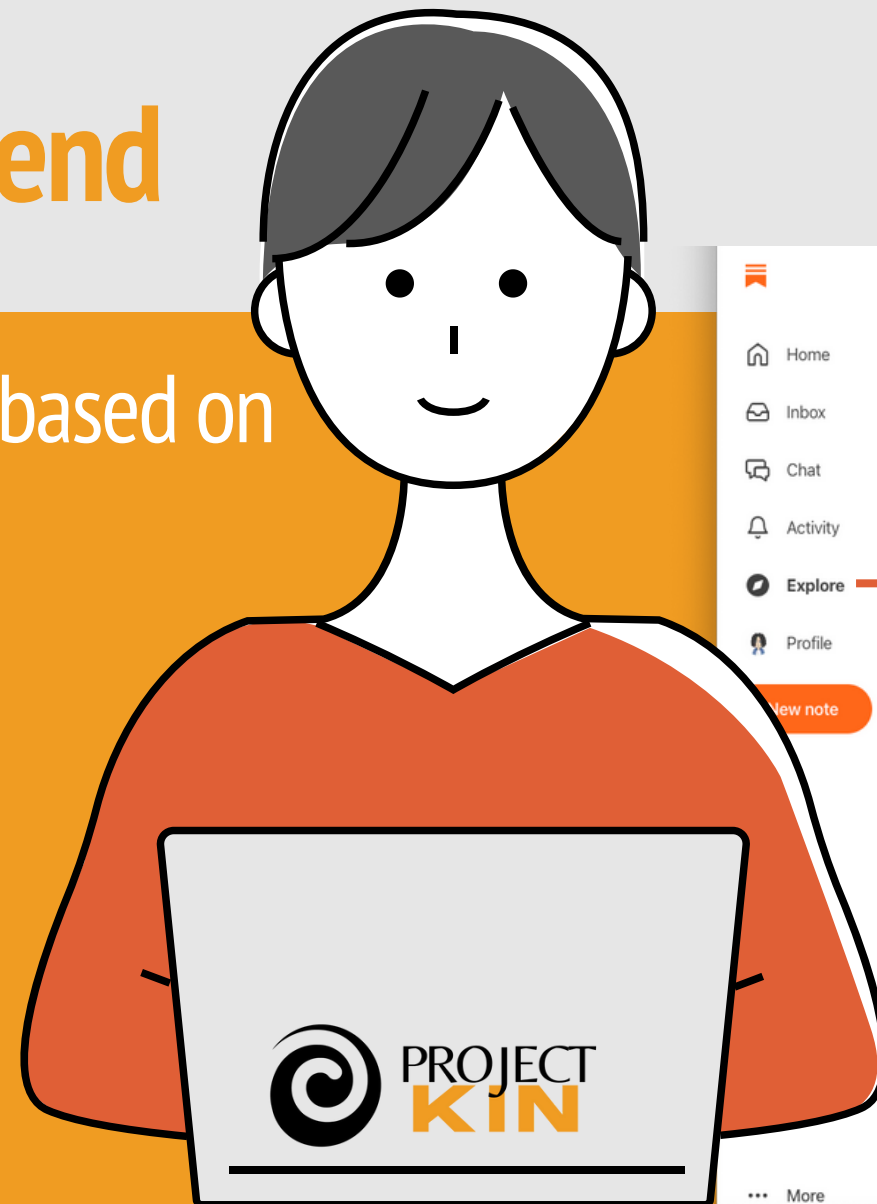
Explore takes you to other publications based on recommendations or, search by topics

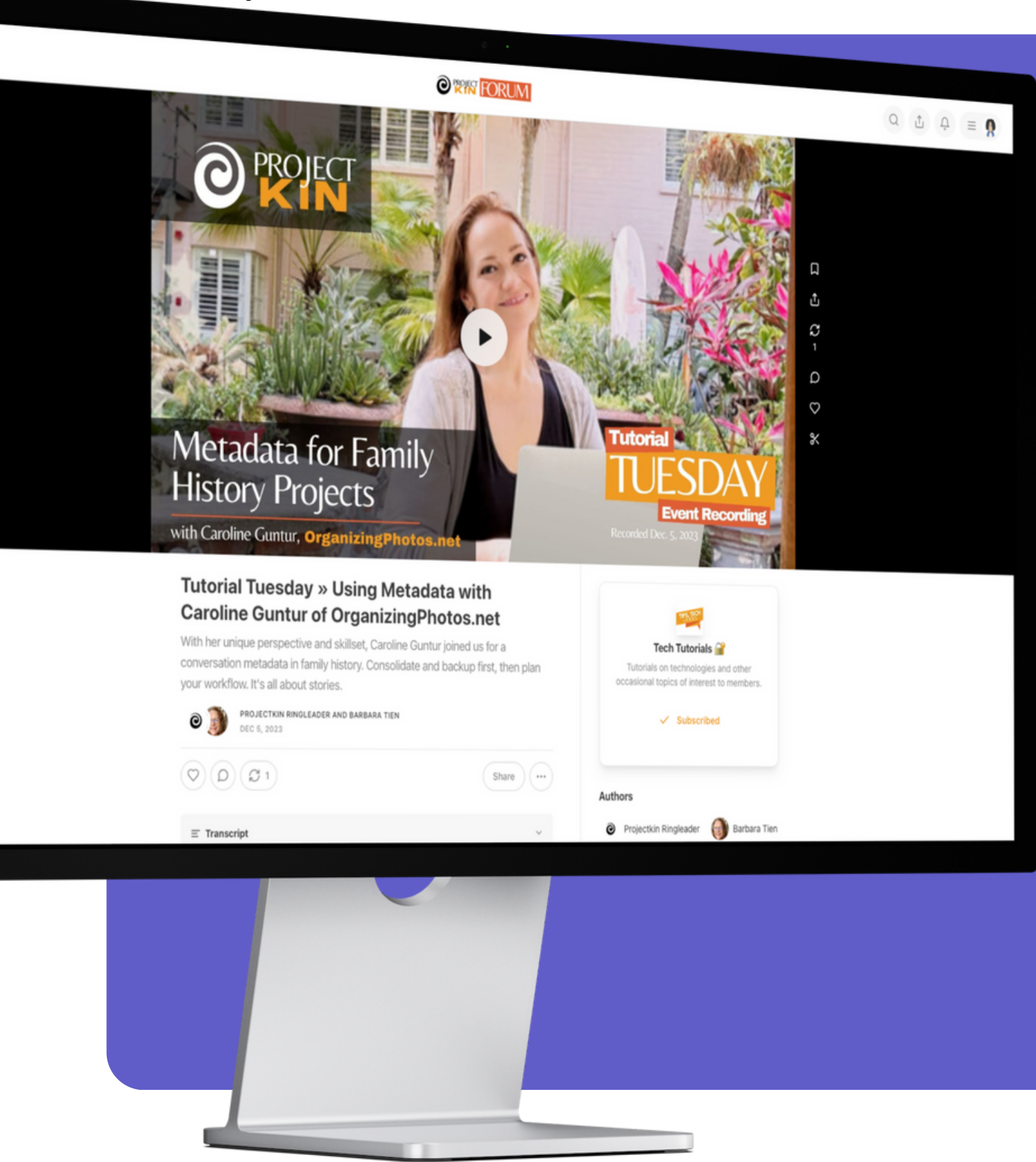
- Search lets you explore posts, publications and people by keywords.

Q "Family History"

Posts Publications People

Any language





## Pause again ...


- Basic mechanics of access
- Core elements of community
  - Questions?

## Ready for a demo?

- **Focused on Projectkin Subscribing Members**

- *Other topics: Writing posts, creating your own publication, settings & more*
- *Please DO explore Substack: Search for “Family History,” “Genealogy,” and more*
- *Best thing you can do to support Projectkin is to share it. You are already doing that!*

- **Resources**

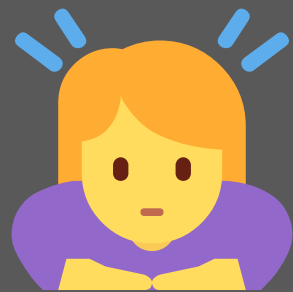
- *There are many: [on.substack.com/s/resources](https://on.substack.com/s/resources)*
- *[Christina Loff's Masterclass for bloggers and creators](#)*
- *Follow people  Christina, for example*
- *Ask (or answer) questions in [Projectkin Chat](#)*

**General**

**Questions**

**(have answers?)**

# THANK YOU



*More questions? Join me in **Chat**. Recording available in a couple of hours in the **Event Archive for Tutorials***

- <https://projectkin.substack.com/s/tech-tutorials>

*I'm @BarbaraTien, your official ringleader here at Projectkin. You can always email me at **projectkin.org@gmail.com***