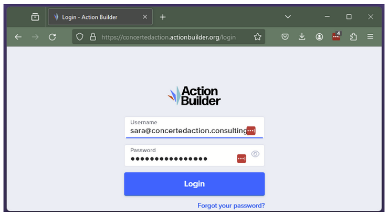
Action Builder Basics

Logging In



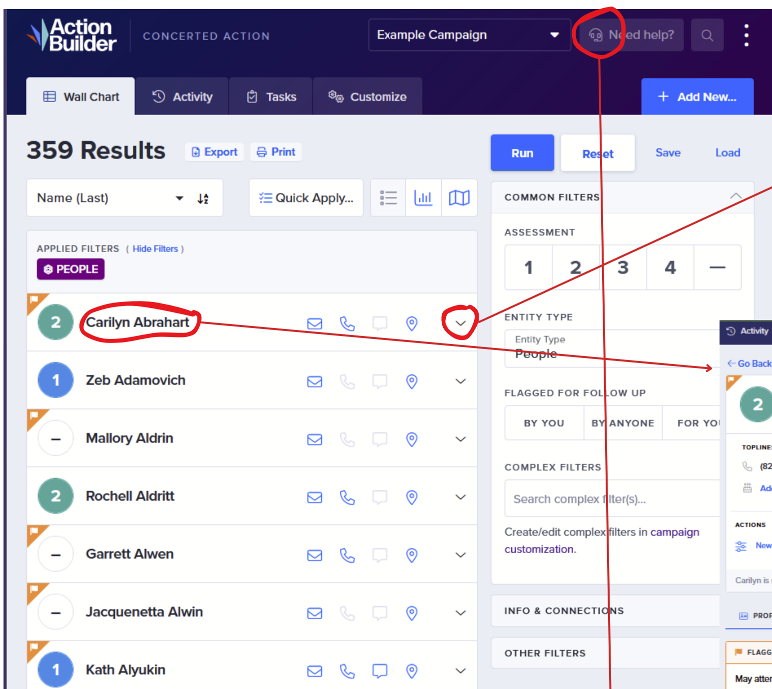
You will receive an email with a log in link when your account is first created.

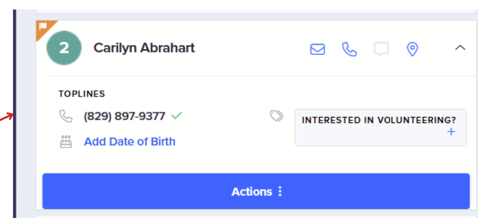
You can stay logged in to Action Builder on the device that you use most often. But if you need to log in again, make sure that you use the url unique to your campaign. (example: https://concertedaction.actionbuilder.org/login)

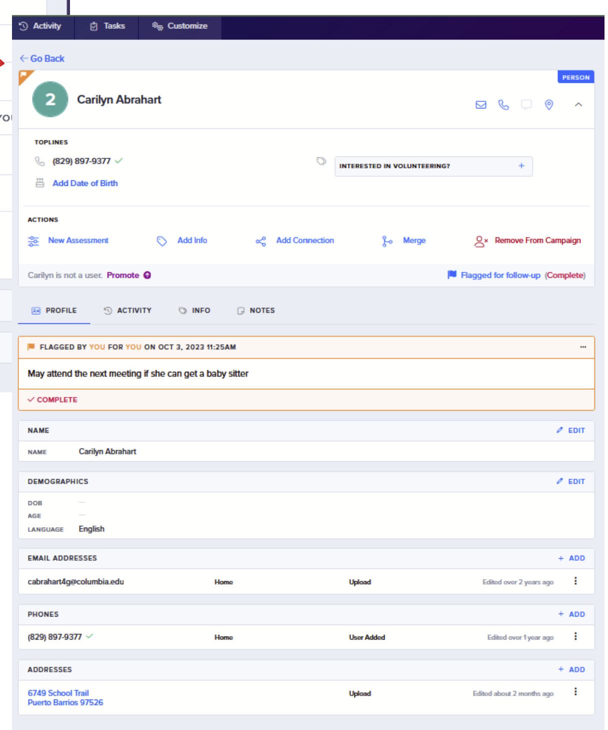
If you need to reset your password and are unable to do so following the "Forgot your password?" prompts, contact your campaign lead or Concerted Action to send a password reset email.

The Wall Chart - Left Column

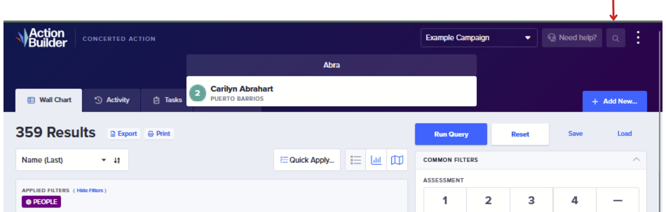
The first tab that you will see when you log in to Action Builder and select your campaign is the Wall Chart. The column on the left list all of the people who are part of your campaign. You can get a little more information a person, by clicking on the down arrow. Or you can view that person's entire record by clicking on their name.







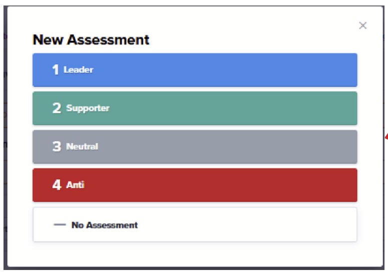
You can also click on the magnifying glass in the top right corner to look up a person by name.



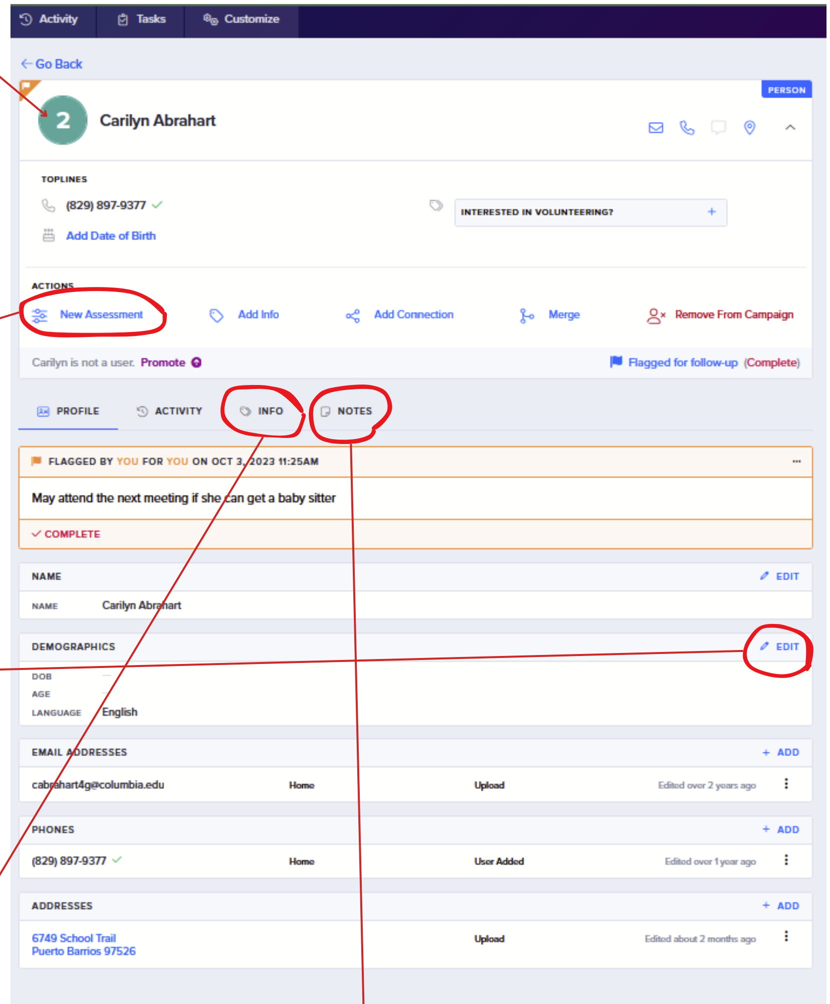
A Person

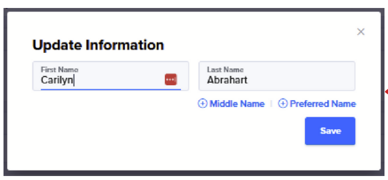
The most important piece of info that your organizing campaign collects is the assessment, which captures whether or not a person is supportive. Talk to your lead organizer to lead organizer for the particulars of your assessment scale, which usually runs from 1 to 4 or 1 to 5, with 1 being the most supportive/ready to be a leader.

To add a new person to your campaign, click on the "+Add New ..." tab at the top of your Wall Chart and follow the prompts.

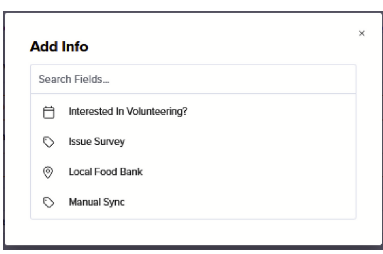


You can add or change an assessment under "New Assessment".



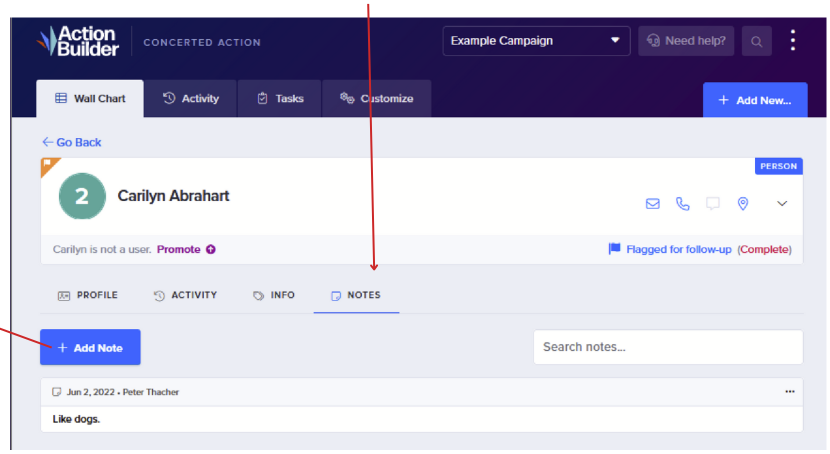


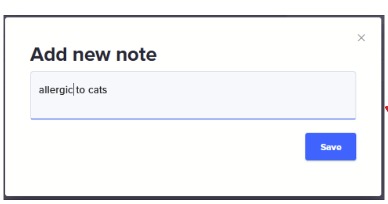
You can add or change other member info by using the "ADD" or "EDIT" buttons on the right.



Your campaign administrator can add custom fields to the info tab. Once a field is added any user can update it.

Notes can be used to capture additional information about a person that doesn't neatly fit into other data fields.

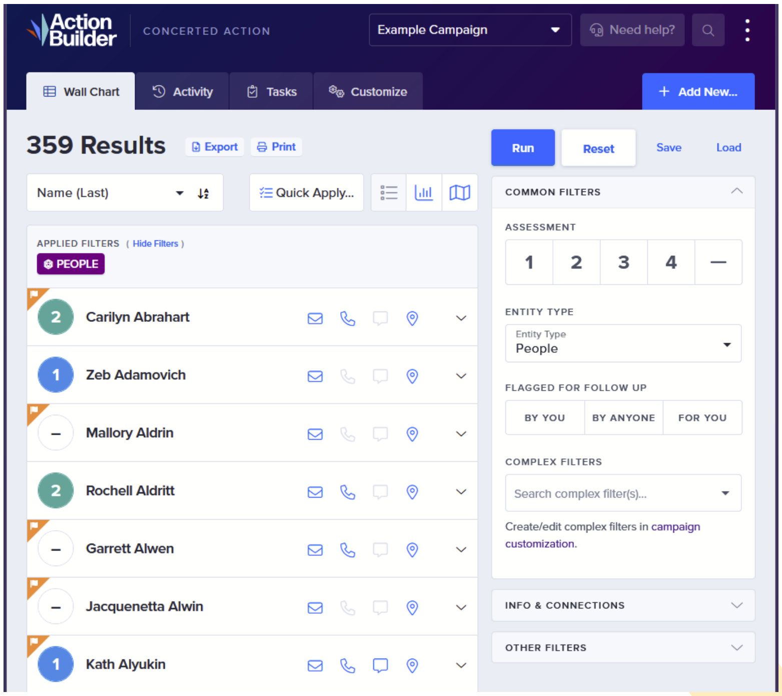




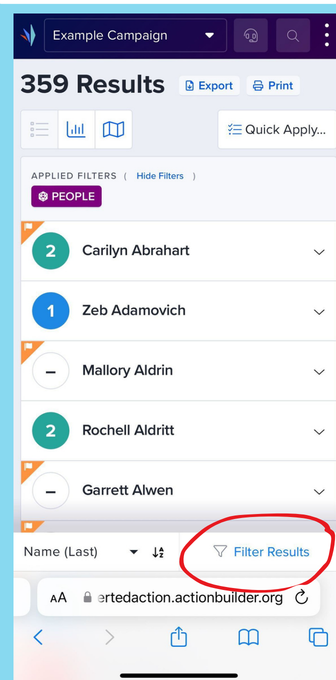
You can add as many notes as you like.

The Wall Chart - Right Column

The right column of the Wall Chart allows you to filter the list of people who appear on your wall chart.

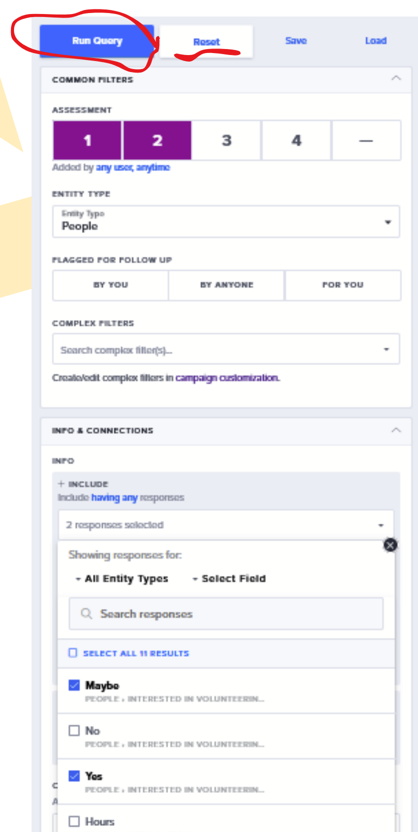


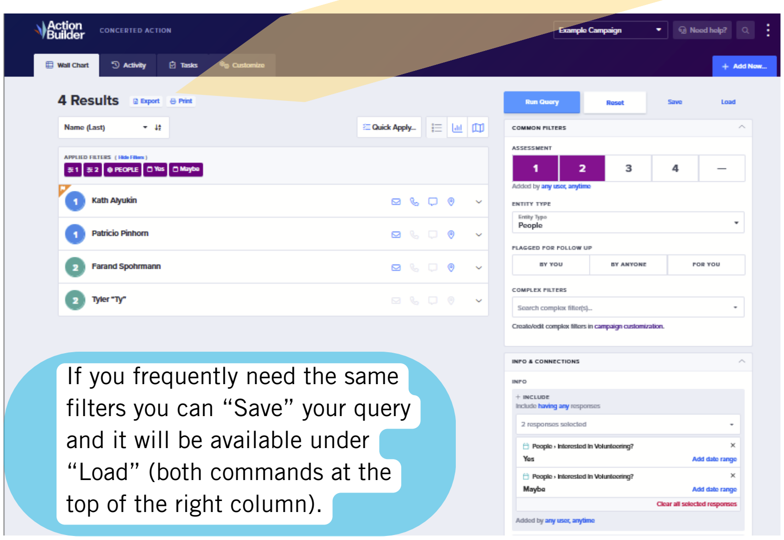
To view this column from a mobile device, you will need to select "Filter Results" as circled below.



You can filter by assessment or by any other piece of data that your campaign is collecting, and you can even filter for multiple pieces of data at once. The example to the right is filtering for people who are assessed as 1 or 2 and have said "Yes" or "Maybe" to volunteering. Hit the "Run Query" button at the top of the column to return the results below.

Hit "Reset" to clear your search.



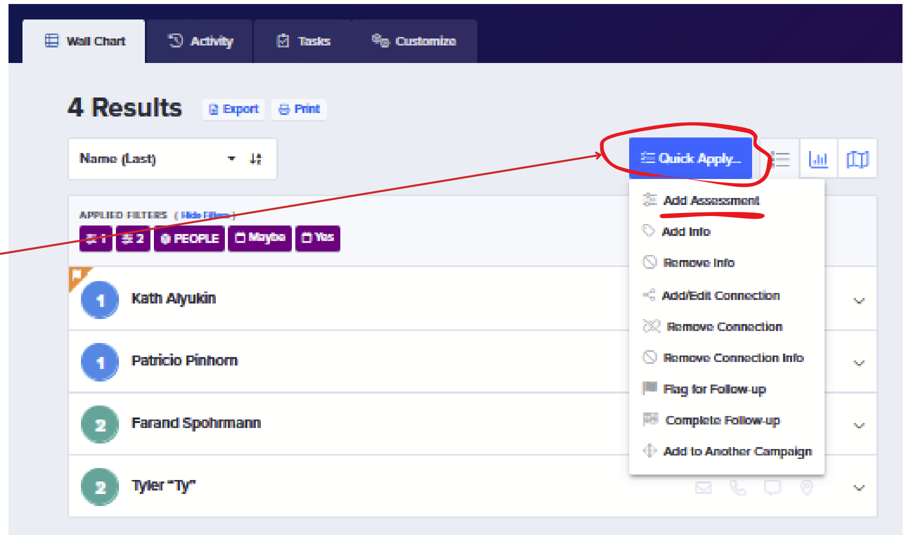


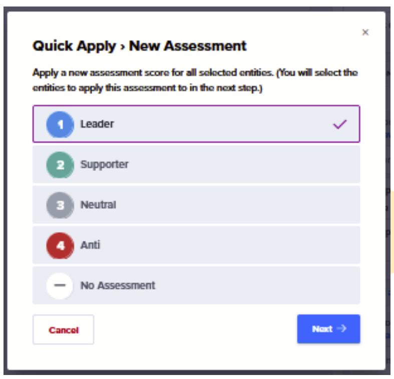
If you frequently need the same filters you can "Save" your query and it will be available under "Load" (both commands at the top of the right column).

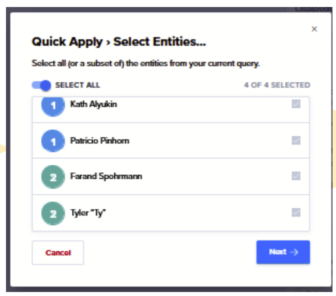
Making Group Edits

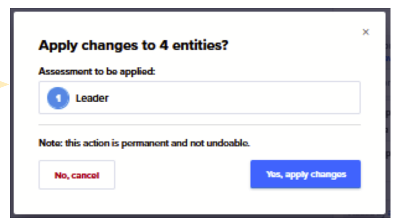
Using the example from the previous page, you could change the assessment of everyone who indicated any interest in volunteering to 1using the "Quick Apply" button.

After selecting "Add Assessment" you will be guided though the following steps:





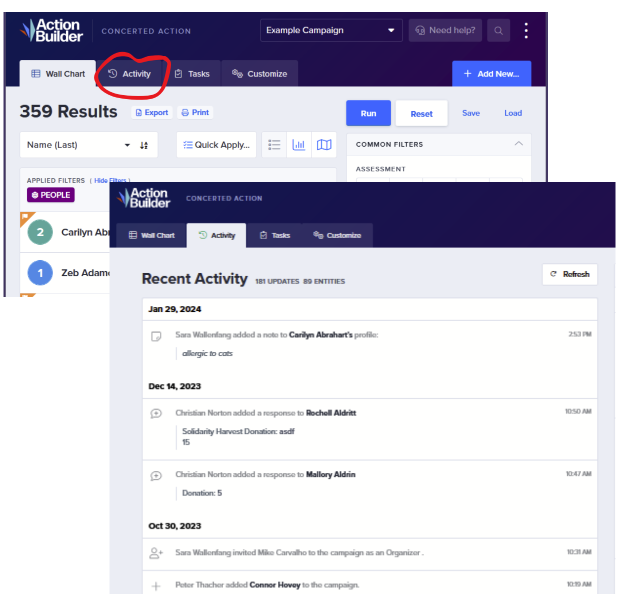


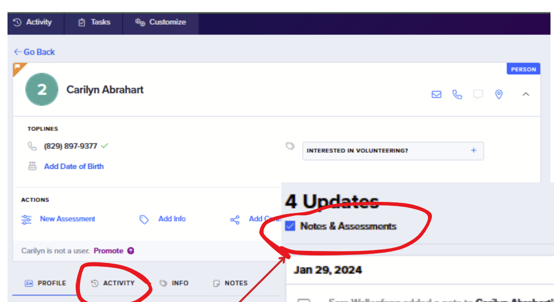


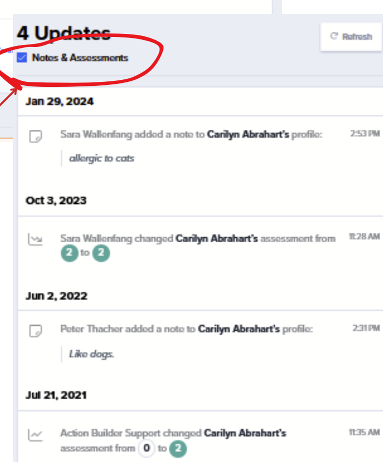
If you have been collecting a large amount of data in spreadsheet, contact your campaign administrator or Concerted Action to see if it can be uploaded directly into Action Builder.

Viewing Past Activity

Both the Wall Chart and the individual record for a person have an "Activities" tab, that will show you updates that have been made by any Action Builder user.







Check this box to filter for changes to notes and assessments only.