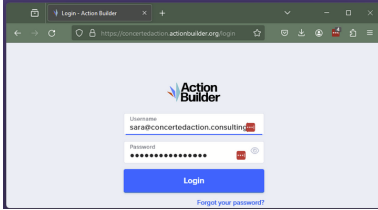


# Action Builder Basics



## 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.

The image shows a composite of three screenshots from the Action Builder interface. The largest screenshot on the left displays the "Wall Chart" for a campaign named "Example Campaign". It shows a list of 359 results, with the first few names visible: Carilyn Abrahart, Zeb Adamovich, Mallory Aldrin, Rochell Aldritt, Garrett Alwen, Jacquenetta Alwin, and Kath Alyukin. A red circle highlights the name "Carilyn Abrahart" and a red arrow points to a dropdown arrow next to it. Another red arrow points from the "Need help?" button in the top right corner of the interface to a smaller screenshot on the right. This smaller screenshot shows the profile for "Carilyn Abrahart", including contact information like a phone number (829) 897-9377 and a button to "Add Date of Birth". Below this is a section for "ACTIONS" with options like "New Assessment", "Add Info", "Add Connection", "Merge", and "Remove From Campaign". A third screenshot at the bottom left shows the search function in the Wall Chart, with "Carilyn Abrahart" entered in the search bar and "PUERTO BARRIOS" appearing below it. A red arrow points from the search bar area to the profile screenshot on the right.

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.

**New Assessment**

- 1 Leader
- 2 Supporter
- 3 Neutral
- 4 Anti
- No Assessment

You can add or change an assessment under “New Assessment”.

**Update Information**

First Name: Carilyn | Last Name: Abrahamart

Middle Name | Preferred Name

Save

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

**Add Info**

Search Fields...

- Interested In Volunteering?
- Issue Survey
- Local Food Bank
- Manual Sync

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

**Add new note**

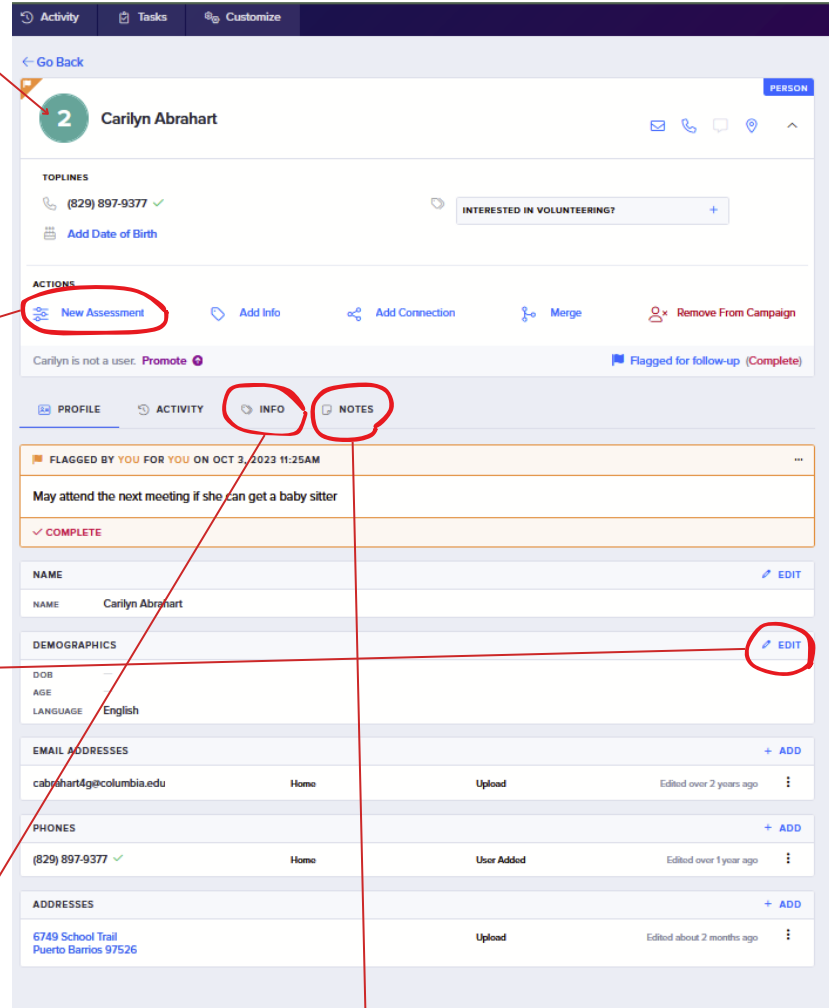
allergic to cats

Save

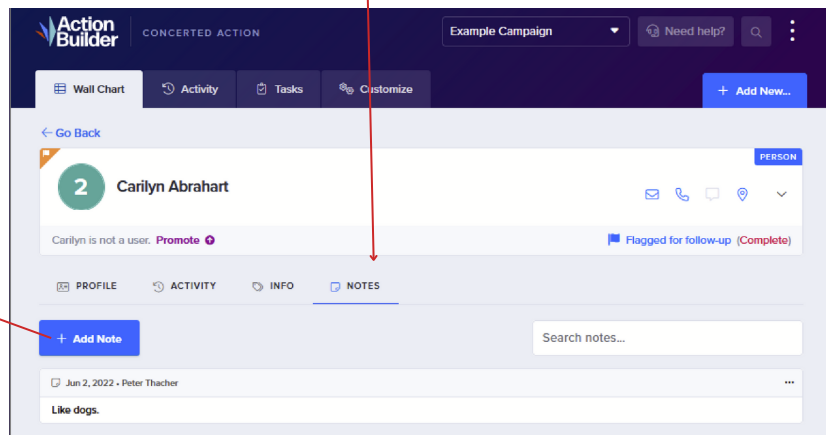
You can add as many notes as you like.



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.



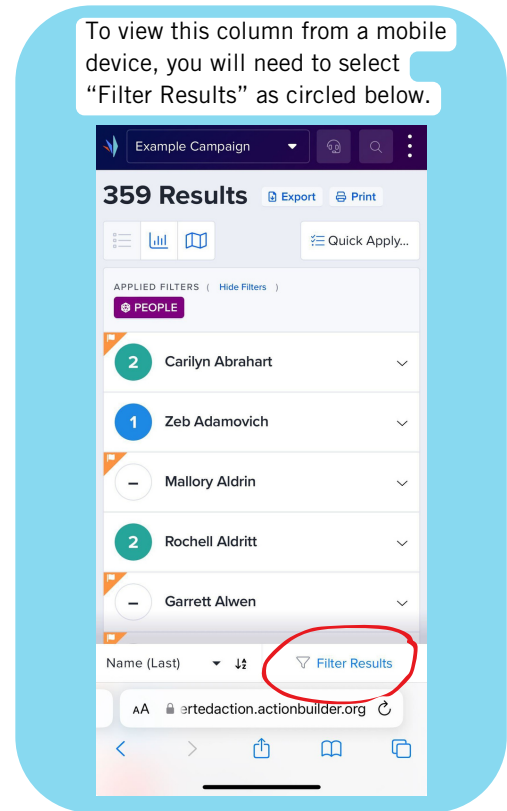
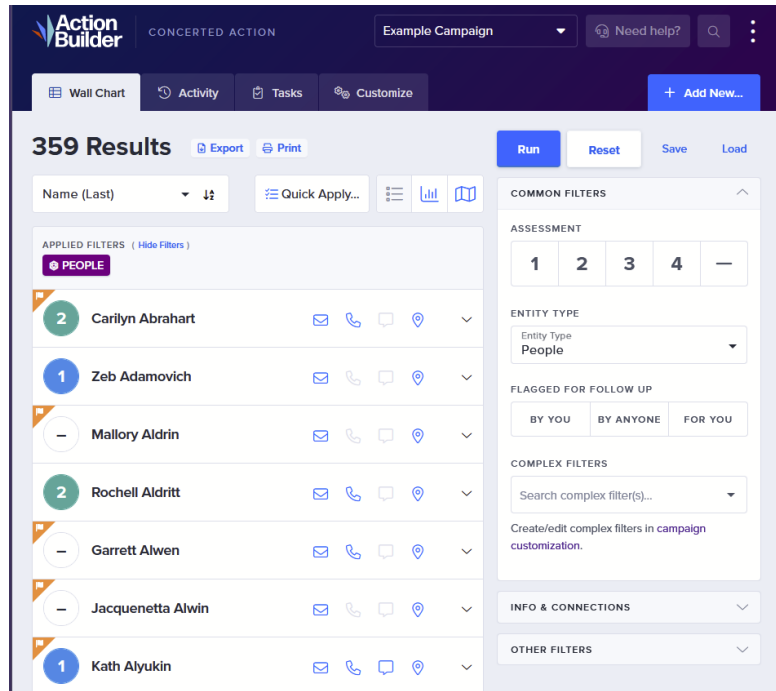
Notes can be used to capture additional information about a person that doesn't neatly fit into other data fields.





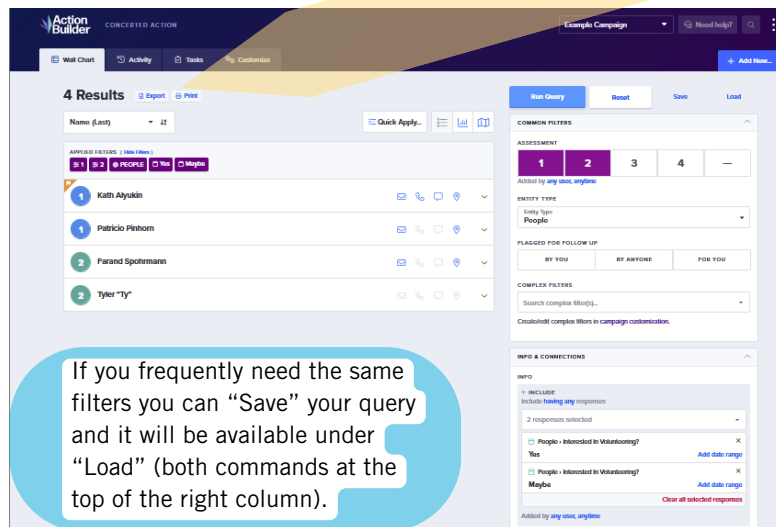
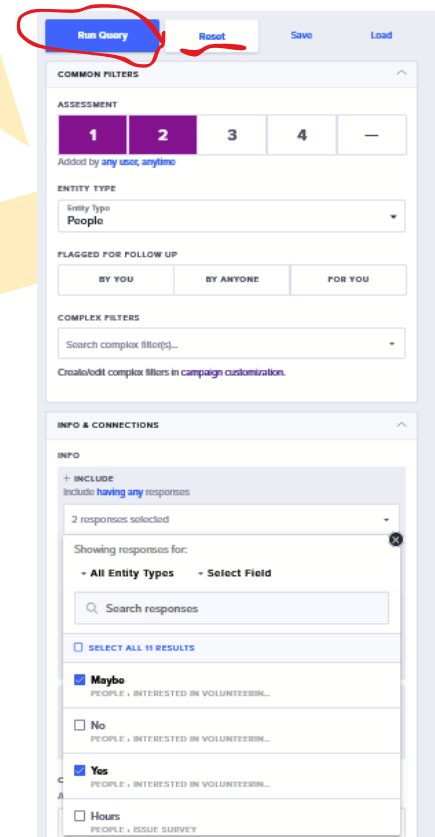
## The Wall Chart - Right Column

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



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.



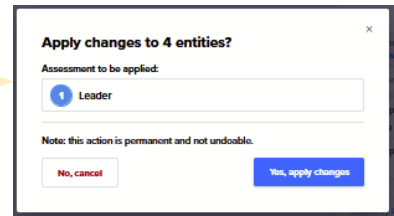
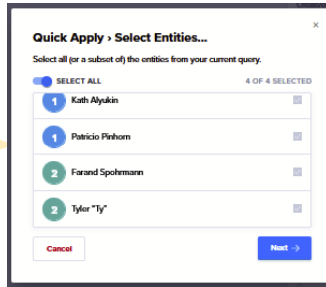
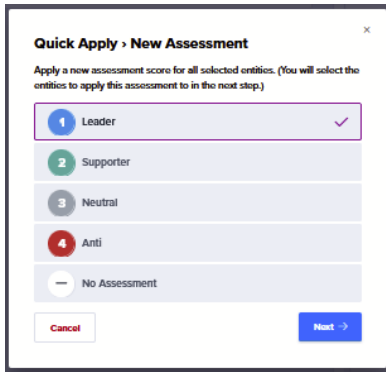
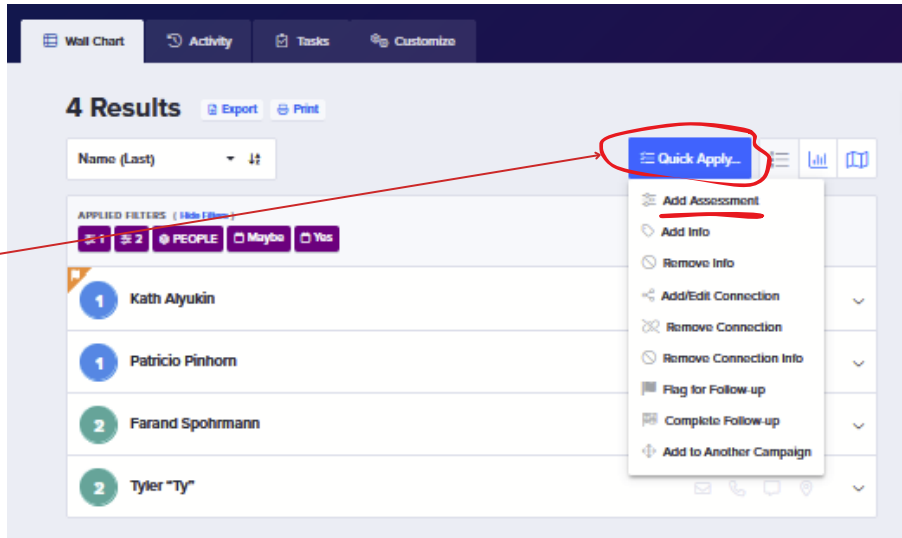
If you frequently need the same filters you can “Save” your query and it will be available under “Load” (both commands at the top of the right column).



## Making Group Edits

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

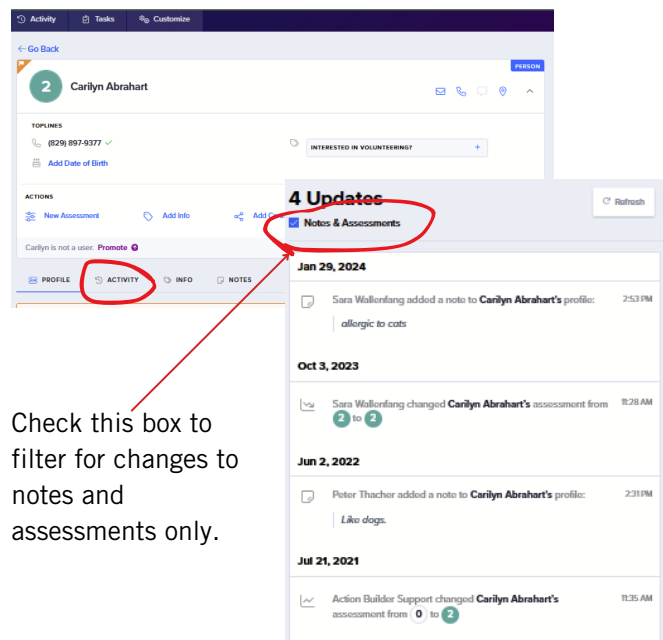
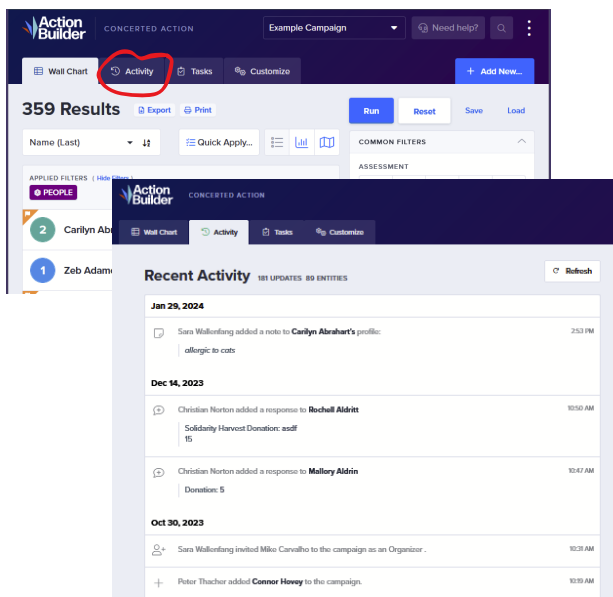
After selecting “Add Assessment” you will be guided through the following steps:



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.