



Since Zip Code and Email are required fields, we put them first, and the column headers have an asterisk. You also have to train your signup volunteers to explain why those fields are so important, and that the activist must write clearly. The signup volunteers need to look at the completed form, and if they can't make out the email or the zip code, they have to ask for clarification.

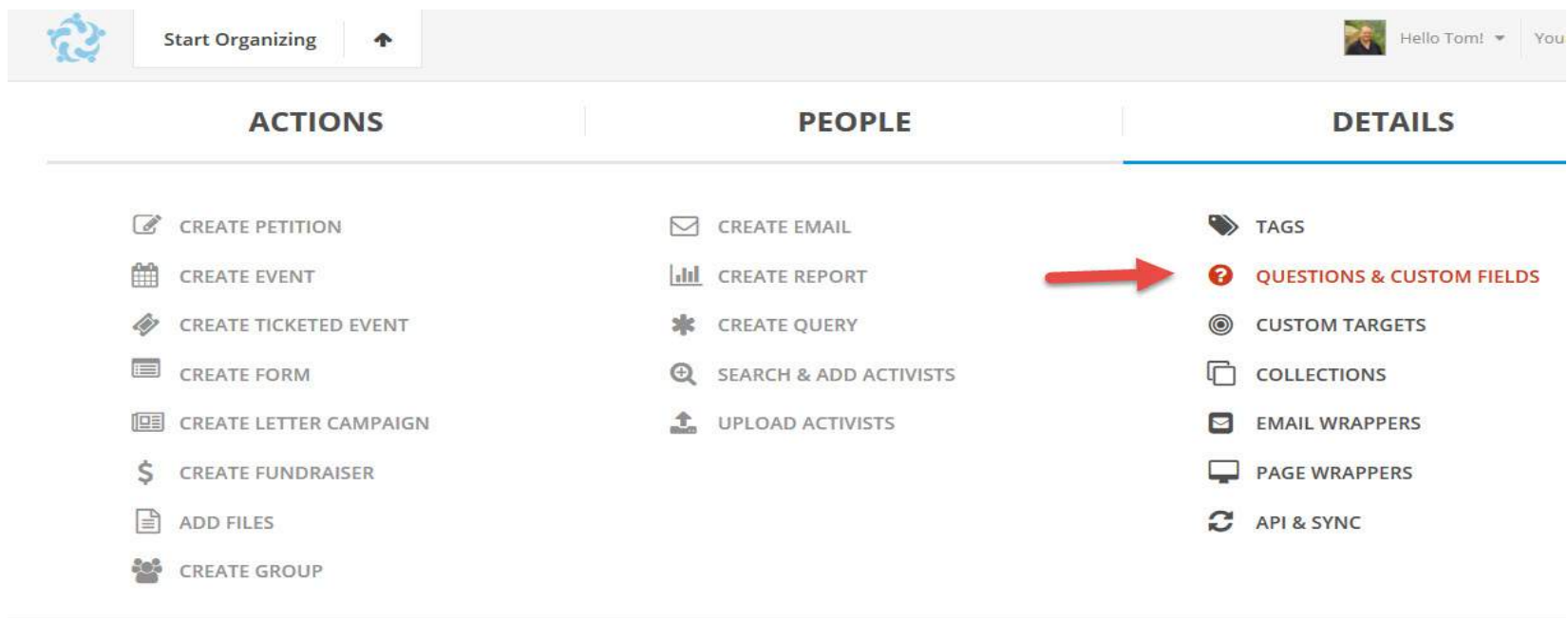
It's important to ask the activist if they want to volunteer. Even if they're not sure, tell them to check the box, since it doesn't obligate them in any way.

Notice the boxes are large. Legibility is extremely important!

Now we've got a bunch of signup sheets filled out. What do we do with them?

We need to create a form in the Action Network database. The starting point for that is creating a Question to handle the phone number and the volunteer checkbox. Email and zip are built-in fields, but those two are not. We add them by creating Questions.

Start by hovering over the "Start Organizing" button at the top of the group management page.



Click on "Questions and Custom Fields" and this page will come up:

## Questions ?

[+ Add New Question](#)



1

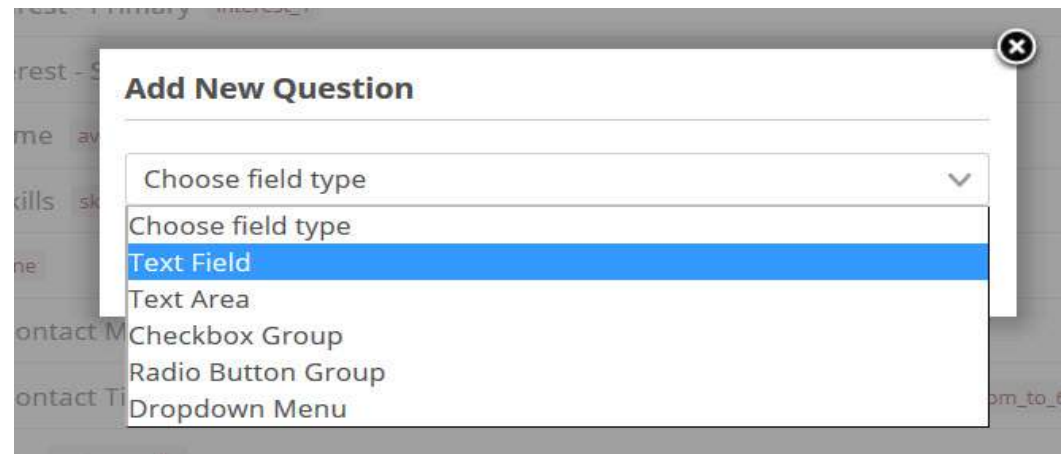
Dropdown Menu	Area of Interest - Primary	interest_1	Edit	Delete					
Dropdown Menu	Area of Interest - Secondary	interest_2	Edit	Delete					
Radio Button Group	Available Time	available_time	Edit	Delete					
Text Area	Notes on Skills	skills_notes	Edit	Delete					
Text Field	Phone	phone	Edit	Delete					
Radio Button Group	Preferred Contact Method	contact_method	Edit	Delete					
Checkbox Group	Preferred Contact Time	contact_before_8am	contact_8am_to_noon	contact_noon_to_4pm	contact_4pm_to_6pm	contact_6pm_to_9	Edit	Delete	
Dropdown Menu	Primary Role	primary_role	Edit	Delete					
Dropdown Menu	Secondary Role	secondary_role	Edit	Delete					
Checkbox Group	Volunteer Checkbox	volunteer_yes	Edit	Delete					

Your page might not have any questions on it. If that's the case, click on the “Add New Question” button.

What you're going to do is add a new field to an Activist record, without having to know anything about the underlying database structure or SQL. Pretty cool !

The first field you need is a phone number. So when you add a new Question, pick the “Text Field” option.

Once you select that, a new popup will show that lets you define the field:



**Type:** Text Field

Administrative Title *	Name *
<input type="text" value="Phone"/>	<input type="text" value="phone"/>
Label	Placeholder
<input type="text" value="Phone Number"/>	<input type="text" value="(999) 888-7777"/>

Blue bar at the bottom.

Here is what the terms mean:

**Administrative Title:** the activist won't see this; it's simply a way for you to refer to the field. Also, this value is not part of the database structure itself.

**Name:** this is the field name inside the database. Generally, I use lower case letters, and if it's more than one word, I separate them with and underscore, e.g. phone\_number.

**Label:** This is what the activist will see on the form, just in front of the input box.

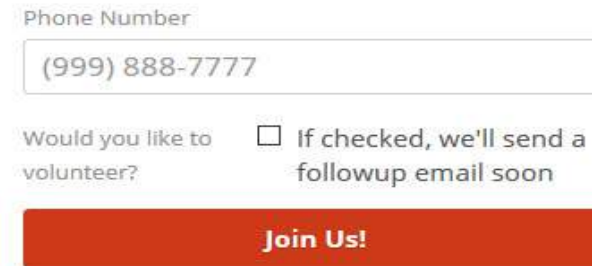
**Placeholder:** A guide to the format you would like, or special instructions. Note that there is nothing compulsory about this. In other words, if the activist enters 4568762344, the system will not balk at that.

Once you're content with your entry, click on the blue bar to save your work. You can always go back and edit a Question.

Next we want to create the ability for an activist to check a box indicating that they want to volunteer. We don't really want a radio button with a yes/no option, because we're only interested in finding people who are positively interested. So the best field type for that is a checkbox group, even though we're only going to put a single checkbox in it.

We want the question on the form to look like this:

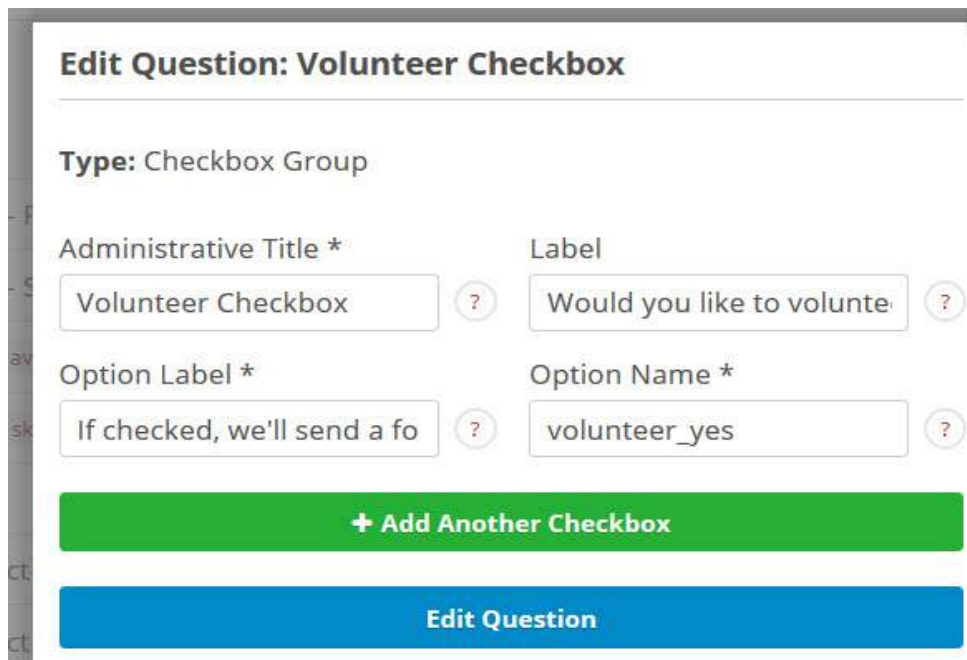
This doesn't force the respondent to answer yes or no, but it does encourage them to check the box.



Phone Number  
(999) 888-7777

Would you like to volunteer?  If checked, we'll send a followup email soon

**Join Us!**



**Edit Question: Volunteer Checkbox**

**Type:** Checkbox Group

Administrative Title \*  ?

Label  ?

Option Label \*  ?

Option Name \*  ?

**+ Add Another Checkbox**

**Edit Question**

Here is what the Question form inside Action Network looks like.

Again, the Administrative Title is for your own reference; the activist will not see it.

The text "Would you like to volunteer?" is in the Label field for the Question as a whole.

The text, "If checked, we'll send a followup email soon." appears after the checkbox and is in the Option Label field.

Finally, the Option Name, "volunteer\_yes" is the value the field will take once it's in the database. Activists who check the box will have that value; anyone who leaves it blank will have nothing there.

A word about field names, e.g. “volunteer\_yes” – and this is important. Take a look at our list of field names (partial).

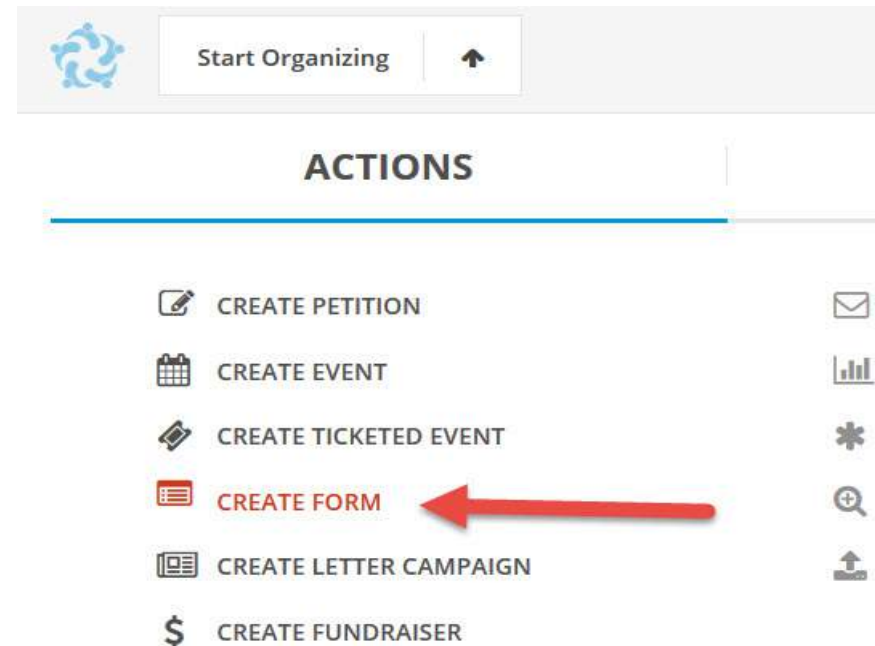
expertise_photography
expertise_research_issues
expertise_social_media
expertise_training
expertise_writing
interest_1
interest_2
interest_primary
Logo Options
phone
primary_role
secondary_role
skills_notes
volunteer_yes_no

You'll notice that they're quite descriptive. And when a checkbox group is involved, the option name is tied to the Question. For example, we have a Question on another form that is related to a person's area of expertise. If I'm creating a query, I can see which fields are directly related to that question: expertise\_photography, expertise\_research, etc.

That's why we didn't use “yes” as an Option Name. Let's say you have another yes/no question on another form, and you use sloppy option naming. How would you tell the fields apart? You couldn't. So use good field naming practices from the very beginning, and you'll save yourself a lot of trouble later on!

Now we have our Questions. The next thing is to create a Join Us form. This is actually quite easy.

Hover over the “Start Organizing” button, and then click on the “Create Form” link.



The screenshot shows a user interface for organizing. At the top, there is a blue circular icon with four arrows and a button labeled "Start Organizing" with an upward-pointing arrow. Below this is a section titled "ACTIONS" with a blue horizontal line. The actions listed are:

- CREATE PETITION (with a pencil icon)
- CREATE EVENT (with a calendar icon)
- CREATE TICKETED EVENT (with a ticket icon)
- CREATE FORM (with a document icon, highlighted in red, and a red arrow pointing to it)
- CREATE LETTER CAMPAIGN (with a document icon)
- CREATE FUNDRAISER (with a dollar sign icon)

On the right side of the actions list, there are several icons: an envelope, a bar chart, a star, a magnifying glass, and an upward-pointing arrow.

## Create A Form:

Join Us Form

This is the header that

The Administrative Title; only you will see this.

### Join With Us in the Resistance

⊕ Add Banner Image (optional)

HTML Format Align **B** / **S** Lists Image Video Table Link Line

We welcome your participation in Indivisible North San Diego County!

Please complete the information in the signup form. We will not share your information with any other group or company.

Action by

Add Creator

Sponsored by

--Indivisible NSDC

The group sponsoring the form

50,000 Actions Taken

Only 50,000 more until our goal of 100,000

Remove Goal Slider

Form Heading \*

First Name

Sample

Last Name

Sample

Email \*

Sample

Zip/Postal Code \*

Sample

Not in the US?

Add Or Edit Additional Form Questions

Add Custom Form HTML

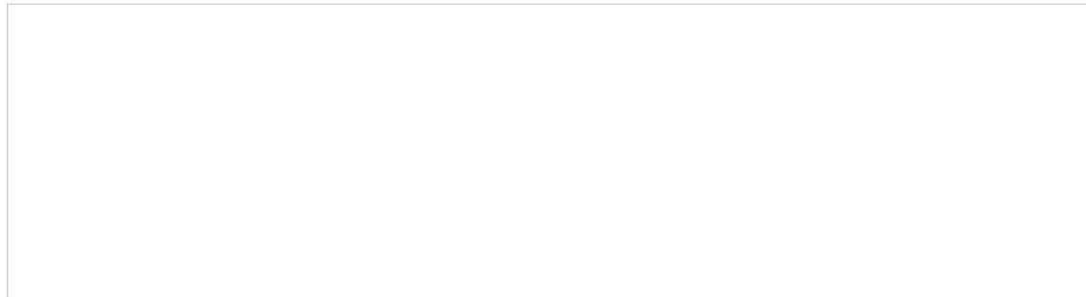
Note that at this point, your form does not include the custom fields we created. To add them to the form, you have to click on the “Add or Edit Additional Form Questions” button.

The process of adding a question to a form is pretty straight forward.

## Instructions

Drag questions from the right to your form on the left to add additional questions to your form. Questions save data in custom fields. Pre-built questions can be made in the "Questions & Custom Fields" section questions in your form to edit their names, labels, and placeholders if you have the permissions, and make them required fields. Drag questions up and down to re-order them, and drag them out of your form to close the form builder.

## Your Form

A large, empty rectangular box representing the form area where questions will be added.

Save Form

## Pre-Built Questions

[select a question to add, then drag it into your form]

[select a question to add, then drag it into your form]

Street Address (answer[street]) [Text Field]

City (answer[city]) [Text Field]

Area of Interest - Primary (interest\_1) [Dropdown Menu]

Area of Interest - Secondary (interest\_2) [Dropdown Menu]

Available Time (available\_time) [Radio Button Group]

Notes on Skills (skills\_notes) [Text Area]

Phone (phone) [Text Field]

Preferred Contact Method (contact\_method) [Radio Button Group]

Preferred Contact Time (contact\_before\_8am contact\_8am\_to\_noon contact\_n...

Primary Role (primary\_role) [Dropdown Menu]

Secondary Role (secondary\_role) [Dropdown Menu]

Volunteer Checkbox (volunteer\_yes ) [Checkbox Group]

Locate the phone field in the Pre-Built Questions drop-down box and click on it.

You'll see the question, formatted the way it will appear on the form.

Now all you have to do is drag it over to the "Your Form" area.

## Pre-Built Questions

Phone (phone) [Text Field]

Phone Number

(999) 888-7777



And you'll see this:

## Your Form

Phone Number

Save Form

## Pre-Built Questions

Phone (phone) [Text Field]

Phone Number

## Blank Questions

Text Input

Text Area

Repeat this process with the Volunteer Checkbox Question, and it will look like this:

## Your Form

If you want to change the order of the questions, just drag them into the position you want.

Now just click on the Save Form button.

Phone Number

Would you like to volunteer?  If checked, we'll send a followup email soon

# Join With Us in the Resistance

⊕ Add Banner Image (optional)

HTML Format Align **B** / **S** Lists Image Video Table Link Line

We welcome your participation in Indivisible North San Diego County!

Please complete the information in the signup form. We will not share your information with any other group or company.

Action by **Sponsored by**

Add Creator ? Indivisible NSDC ?

The two questions have been added to the form!

**50,000 Actions Taken** ?

Only 50,000 more until our goal of 100,000

Remove Goal Slider

**Form Heading \*** ?

First Name Sample

Last Name Sample

Email \* Sample

Zip/Postal Code \* Sample

Not in the US?

Phone Number (999) 888-7777 Sample

Would you like to volunteer?  If checked, we'll send a followup email soon



Now click on "Save and go to next step".

# Thanks for your support.

Help us meet our goal by spreading the word about this action using the tools on this page.

## Sponsored by



 Indivisible North San  
Diego County  
 San Diego, California

HTML Format Align **B** / **S** Lists Image Video Table Link Line



Additional thank you message or instructions for your action takers (optional)

This is what will pop up on the screen when the user has submitted the form. You can direct the activist to another link, or just thank them for joining.

When the text is the way you want it, click on the “Save & Publish” button.

When you publish the form, you'll get a screen with a big blue section like this. It seems like we're done . . . but we have one last crucial step:

TAGS!

Tags are what will make data mining a snap. Once we assign a tag, every single person who turns in this form will automatically get assigned the tag.

However, if you haven't created any tags, you'll have to create them first.

Once again, hover over the Start Organizing button and click on the Tags link.

Currently Managing:

# Join Us Form

*Join With Us in the Resistance*

[View Form](#) [Edit Form](#) [Edit Tags](#) [Unpublish](#)

Create an email or report targeting all action takers:

[Create Email](#) [Create Report](#)

Status: **Live**

Sponsored by

San Diego, CA

Start Organizing

Hello Tom

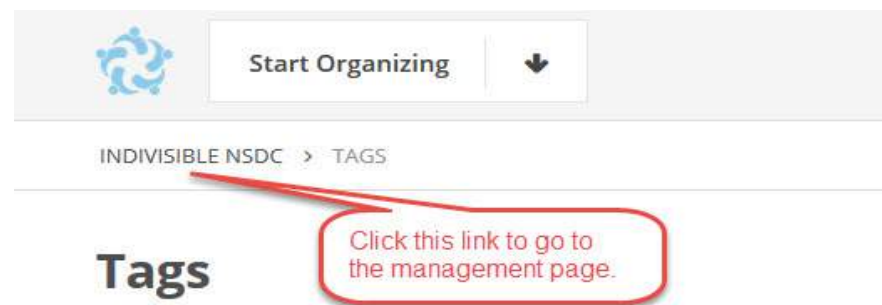
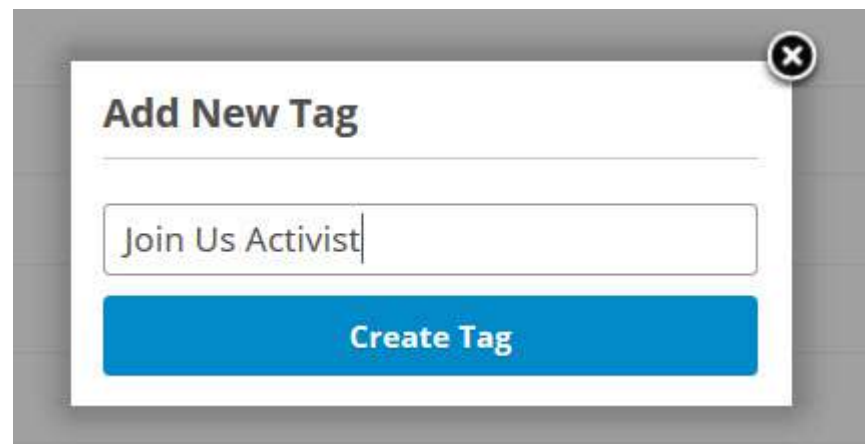
**ACTIONS** | **PEOPLE** | **DETAILS**

CREATE PETITION CREATE EMAIL TAGS

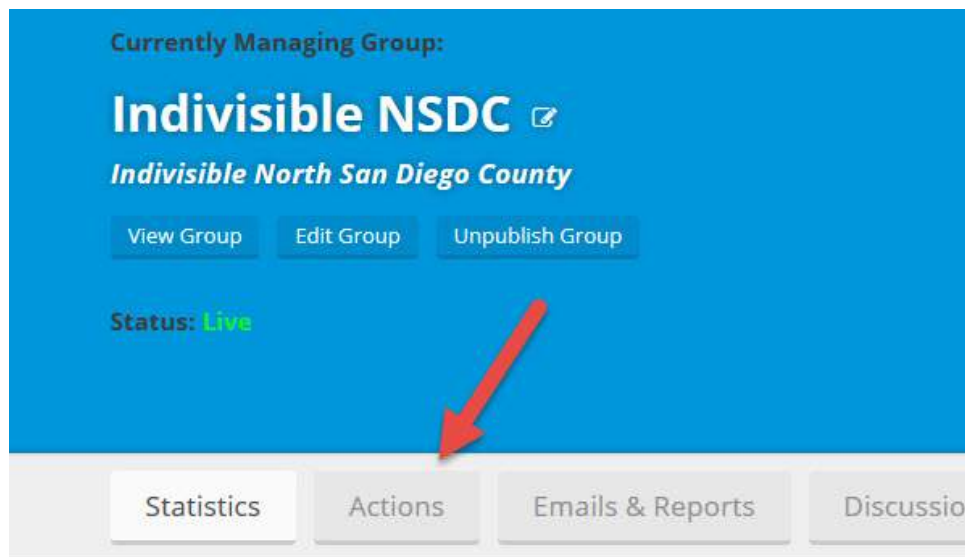
Let's add the Tag, "Join Us Activist". Then click on the "Create Tag" button. You'll see your new tag in the list of tags.

Now we have to make sure that everyone who completes the Join form gets this tag. To do that, go back to your group management page.

Tip: there's an easy way to do that. On almost all pages, you'll see some breadcrumb navigation at the top of the page. Just click on the first item, which is your group. That will take you directly to the group management page.



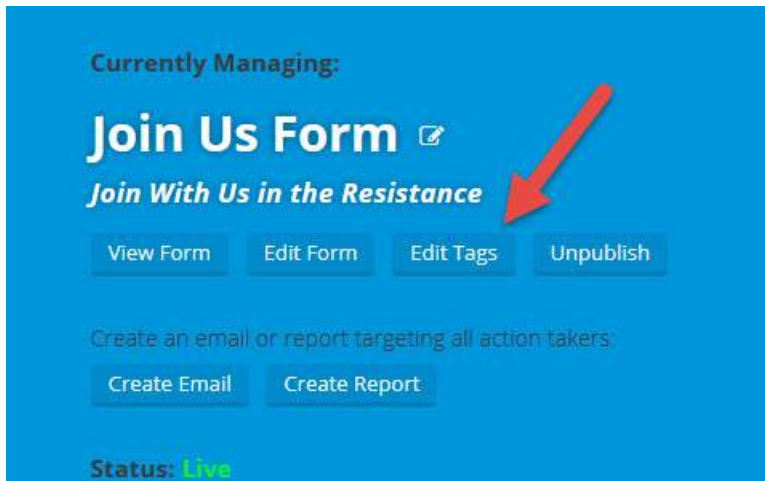
Back at the management page for your group, click on the Actions button.



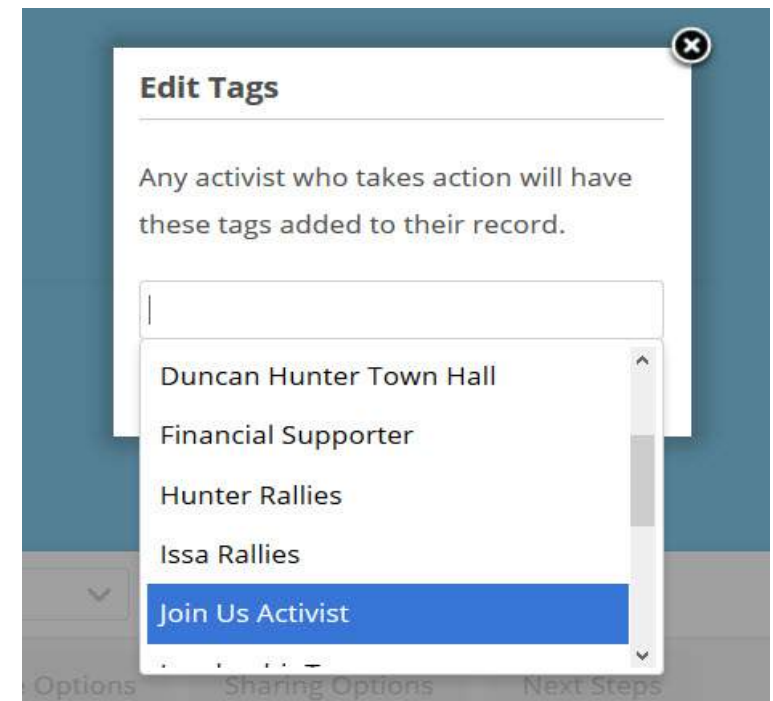
Click on the “Manage” button by the form.



Now click on the “Edit Tags” button.

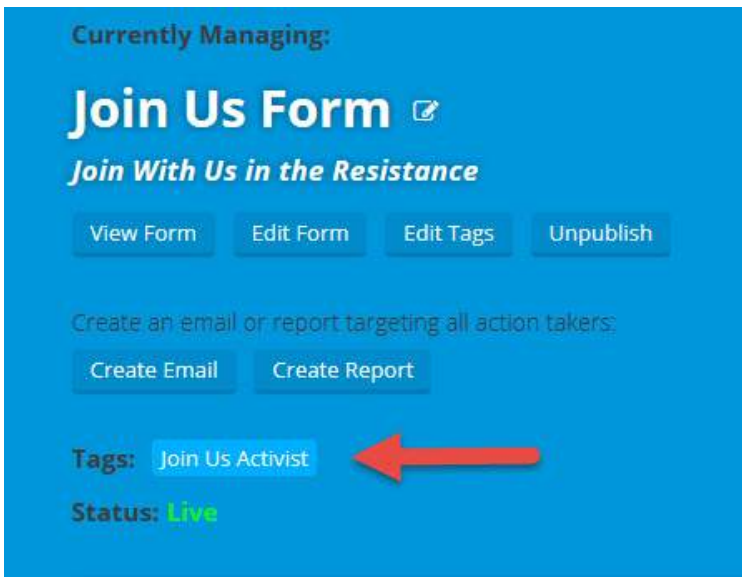
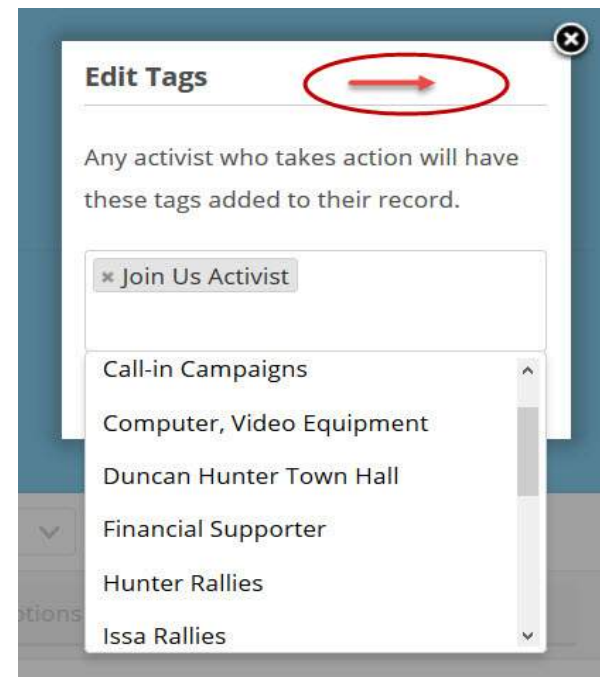


From the drop-down, select “Join Us Activist”.



Now here's a little bug, er "feature" in Action Network. If you have a long list of Tags, you won't see a way to save your selection. Your drop down will look like this, and you might wonder what to do.

Just click in the area where the red circle is, and the drop down will disappear, and you'll see the "Save Tags" button.



Now when you see the form management page, you'll see the new Tag has been added. You can rest assured that anyone who fills out the form will have that Tag added to their activist record.

But wait ! There's more!

If you scroll down the management page, you'll see a box called "Embed this Action." This box contains the code that you can copy and paste into your web page.

## Breaking News

[Town Halls in San Diego: Issa Deflects, Hunter Sings Off Key](#)

[OB Rag](#)  
March 14

[Issa Faces Severe Setbacks in 2018, Poll Reveals](#)  
[The Daily Caller](#)  
March 14

[Issa's own poll suggests Trump is a burden](#)  
[SD Union Tribune](#)  
March 13

[Duncan Hunter Vulnerable in 2018? Times of San Diego](#)  
March 12

[Duncan Hunter's town hall from hell](#)  
[Escondido Grapevine](#)  
March 12

[GOP lawmaker: Obamacare](#)


If you have already joined, but would like to do more, [click here to volunteer!](#)

## Join Us!

### Join the Resistance

<input type="text" value="First Name"/>	<input type="button" value="Join Us!"/>
<input type="text" value="Last Name"/>	<input checked="" type="checkbox"/> Opt in to updates from Indivisible North San Diego County
<input type="text" value="Email *"/>	
<input type="text" value="Zip/Postal Code *"/>	
<a href="#">Not in the US?</a>	
Phone Number	
<input type="text" value="(999) 888-7777"/>	
Would you like to volunteer?	
<input type="checkbox"/> If checked, we'll send a followup email soon	

**Sponsored by:** Indivisible North San Diego County

 THE ACTION NETWORK

## Embed This Action ?

```
<link href='https://actionnetwork.org/css/style-embed.css' rel='stylesheet' type='text/css' /><script src='https://actionnetwork.org/widgets/v2/form/join-with-us-in-the-resistance?format=js&source=widget'></script><div id='can-form-area-join-with-us-in-the-resistance' style='width: 100%'><!-- this div is the target for our HTML insertion --></div>
```

Options +

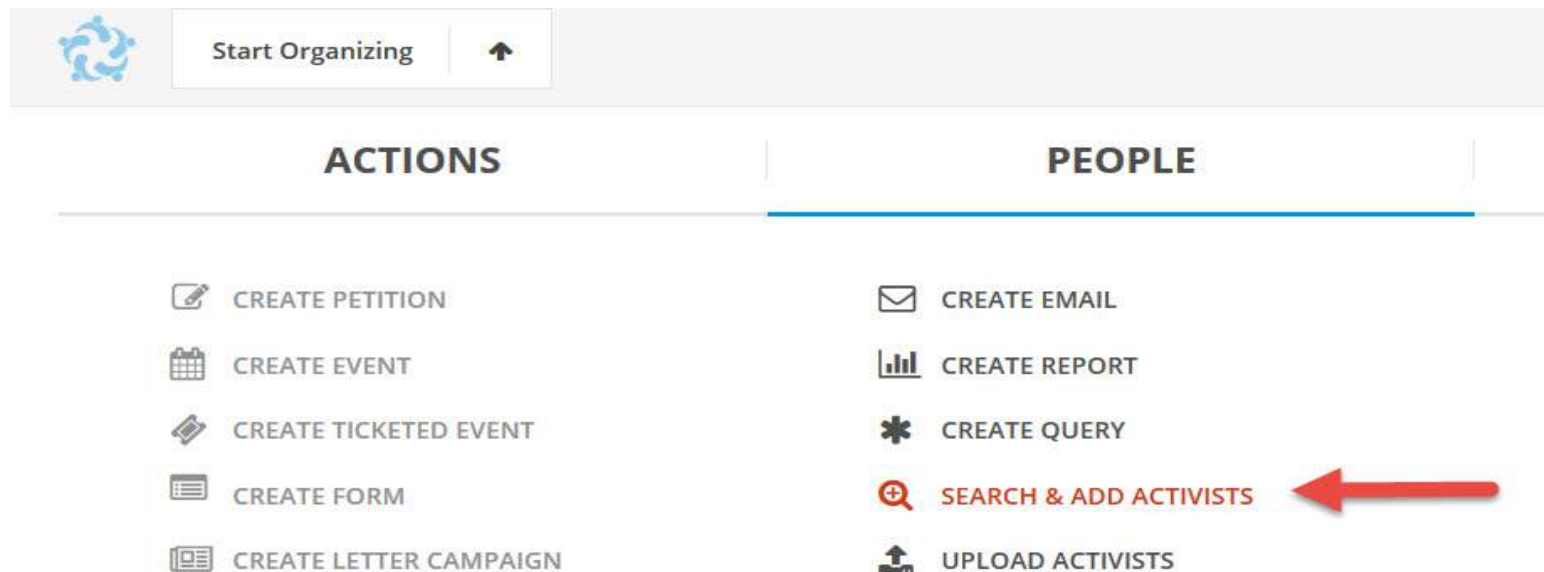
This is what that embedded page looks like on our website.



You can also scroll up from the embed code box, and you'll find a box with a Direct Link field. You can copy and paste this code into any website, including your Facebook group page. That way, people can sign up directly from your social media accounts.

You can put the link in an email, too.

OK, that's all well and good, but what about the people who complete the signup sheets. How do we get them in the database?



We go back to our management page (if we're not already there), hover over Start Organizing, and click on the link, "Search and Add Activists".


## Search Activists

Indivisible NSDC

Search by name, email, and/or address (at least 3 characters)

Search within this list: Or load a report...

+ Add New Activist



Click on the Add New Activist button.

Adding To List: Indivisible NSDC

mysecretname@gmail.com

Address



City

State

Not in the US?

92024

English



On your signup form, you might have a few names or hundreds of names. You'd like to do as little data entry as possible.

Also, you don't know whether that person is already in the Action Network database. For example, if they're a teacher, and a member of the N.E.A., they probably already have an Action Network account.

So the easiest thing to do is just enter their email address and their zip code, and then click on the "Save & Add Activist" button.

This activist has an Action Network account. Therefore, you will not be able to edit their personal data, though you can still add so

TomTestAcct

TestAcct

tomoscott.email.test@gmail.com

Address

Encinitas

California

Not in the US?

92024

English

LeadershipTeam NSDC Activist

Add a source code

phone (999) 875-3622

volunteer\_yes\_no volunteer\_yes

choose a custom field Custom Field Value

Or create a new custom field

You might get a result like this. In this example, the activist was already an Action Network member. In fact, all the information is already filled in, so you don't have to do anything at all with that account.

If the person is not a member, they'll be added to the database, and their member record will show up. From there, you can click on the Edit button at the bottom of the page, and add the relevant information from the signup sheets.

Now that the activist is in our database, we can use Action Network's reporting and query tools to create targeted emails, fundraisers, and other campaign. But that's the subject of another case study.