Action Network guide for new users

OFA is excited to announce that we are switching to Action Network as our primary grassroots organizing platform. Action Network offers a set of helpful tools that will allow OFA volunteers to build their chapters in a more sustainable way by owning the process of creating and managing events and emails.

What is Action Network
The Action Network is a progressive online platform that empowers individuals and groups to organize for progressive causes. They want to make sure that organizing and mobilizing is accessible to anyone, so you can join in by creating a free account.

Why Action Network
With an account on Action Network, you can easily create and promote your events—whether it's a house meeting, film screening, phone bank, or discussion. You can create petitions, draft up a survey form, or launch a letter-writing campaign to have fellow activists email their elected officials. As people fill out the forms you have published, those folks can opt in to your own Action Network email list.
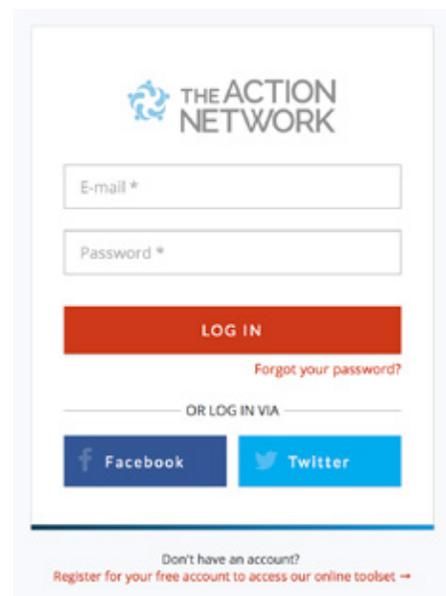
Getting started

Sign up for an account
To sign up for an Action Network account, click the "Login or Signup" button in the upper right-hand corner and then select the "Register for your free account to access our online toolset" link at the bottom of the login page. Fill out the form fields and submit by clicking the "Let's Go" button to sign up.

After signing up, you'll receive a welcome email with a verification link for the registered email address that you entered. Clicking on that verification link will activate your account. You can also create an Action Network account using your Facebook or Twitter account.

Get more information about signing up for an account and logging in via Facebook or Twitter.

OFA

Edit your profile
Once you've logged in, click the "Edit Your Profile" link from the menu in the upper right to access the **edit profile page.**

On the edit profile page, you can update your avatar by uploading an image and enter additional profile information you'd like to display to others when they visit your public profile. You can also change the name, email address, address, city, ZIP/postal code, and country associated with the account.

If you're not logged in using Facebook or Twitter, you can also update your password.

Get more information about editing your profile, avatar, password, or personal information.

Creating an event

Local events: Our evergreen events campaign
You will create your events through the "Local events" campaigns we have set up. This will allow us to host all events in one place so that people will be able to search for events by zip code. You will create your events using the OFA Local Events link—you should bookmark this link so that you can easily find it again!

You will be able to choose a date, time, and location for your event. Action Network has built in 24-hour reminders for hosts and attendees, and will automatically inform attendees of a change in location or time.

Days of Action events and email attend sends
When we have a specific day of action, such as the #StillIn Climate Day of Action on November 14, we will create a unique events campaign so we will be able to group those events together for promotional email sends for those specific events. Those links will change periodically as new days of action come up and will be shared in the host guides we create for the specific day of action.

> **To create your event:**
> 1. Go to the **OFA Local Events** campaign page
> 2. Click on the "Host an Event" event button
> 3. Enter the title, date/time, and location of your event
> 4. Under the event description, you should add the specific details for your event that attendees need to know, such as the kind of event—action planning meeting, film screening, phone bank, panel discussion. Share any speakers or partners that are confirmed as well as any special instructions for your attendees, such as bring food for a potluck.
> 5. Leave the default "Event by [Your Name]"
> 6. The fields on the right-hand side are the fields your attendees will fill out, so for example, to add an additional field to collect phone numbers, just click "Add or edit additional form questions"
> 7. Click on the button to allow attendees to bring guests
> 8. Save and go to the next step
> 9. On the next page, add in any additional information for your attendees.
> 10. Feel free to share your event on Facebook or Twitter or send an email to your list, all from one place!

Growing your email list

Keep in touch with everyone on your list with your own built-in mass e-mailer. You can send an email to your list or you can even segment your list based on tags, actions taken, geographic area, or another custom field response (e.g.: All activists who have the value of "yes" under "interested in a 1:1" custom field.) You can also target your email sends based on core fields like email address or name, which will allow you to target activists who have .edu in their email addresses for example.

Get more information about [sending emails (video tutorial)](), [segmenting your list](), [linking to actions](), and [monitoring email response and statistics.]()

Collecting the data you need

Form pages help you collect information from volunteers and people in your network. They can be used as sign up forms, tell your story forms, survey pages, and more. Forms are a more flexible version of petitions or events—instead of requiring a host or a specific time and date, forms allow you to ask your users any type of question in a format that you choose. You only have to fill out a title and a description on the left and then be sure to fill out the "Form Heading" on the right side. The additional fields on the right-hand side are the fields people will fill out, so for example, to add an additional field to collect phone numbers, just click "Add or edit additional form questions."

Get more information about [setting up forms (video tutorial)](), [creating forms](), and [downloading form results]().

Joining a group

To join a group, navigate to the group's public page and if the group is open to applications, click the "Apply To Join" button in the sidebar on the right-hand side. You must have an Action Network account and be logged in to join a group. Enter a reason why you want to join in the box, then click "Apply" to submit your application to the group's administrators, who will have to approve you before you are added as an organizer.

You will receive an email when the administrators have approved your application, letting you know that you are approved and providing you with links so that you can start participating in the group.

Happy Networking!