

# Events and Forms

These are called 'actions' in Action Network jargon.

- What are event and forms for?
- Creating a form
- Online events
- In-person events
- Page Wrappers
- Useful fields and questions
- Advertising your event
- Pre-fill data in a form

# What are event and forms for?

Events and forms are called 'actions' on Action Network.

## **Why use them?**

They are a way of getting the subscribers on your list to interact and respond. Instead of sending them away from Action Network (e.g. to read a newspaper article or to sign up to a zoom) you keep them inside Action Network and therefore track responses.

You can use **forms** to do surveys, ask questions or collect more data on interests or skills.

You can use **events** for both in-person events with a physical location or for online talks, meetings, training etc.

If people fill in your form or event, you'll be able to see their response and learn more about the people on your list.

A list of useful [ready-made standard questions](#) are available for you to use.

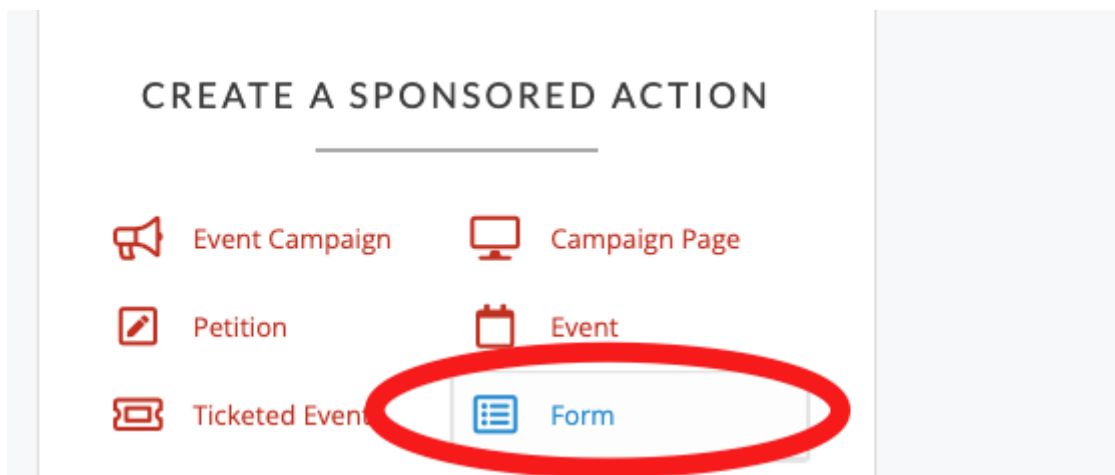
# Creating a form

Forms are for collecting extra information or feedback from your list. E.g

- asking people if they are interested in certain ongoing activities like 'arts', 'action planning', 'social media support'.
- a general shout out for people with any time to spare (giving some options)
- registering their interest in distributing leaflets (you might collect their phone number so you could contact)

## To start a new form - start here

From the **Create a sponsored action** menu on the right hand side, choose **Form**









## To edit a current form - start here

Click on **Actions** then either **Manage** for a published form OR **Edit** for a form still in draft. Follow the same instructions below, but obviously some things may have already been set up.

Statistics **Actions** Emails Reports Activists Syndication Administrators Network Settings

### Latest Actions ?

1 2 3


Event	Test event	  
1 Action Takers by [redacted] Modified: 12/02/2023		
Event	Test event 1	Draft   
0 Action Takers by [redacted] Modified: 11/02/2023		

## 1. Title and description

Give your form a short and clear title (and optionally a more descriptive different title for internal use only) and also a description/instructions written clearly for the person you want to fill in the form.

**Edit Form:** Administrative Title (Optional)

**Title of your action \***

 **ADD BANNER IMAGE (OPTIONAL)**

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

**Why is this important? \***

## 2. More settings

You can let people know how many other people have taken the action of filling out the form by leaving the **Progress Bar** on, but usually this is turned off. Then you need a short **Form Heading** and at the is you can update the text that appears on the submit button depending on what kind of form this is. This could be e.g. 'Update', 'Submit Info' or 'Register'.

The screenshot shows a form configuration interface. At the top, there is a 'PROGRESS BAR' section with a green toggle switch, circled in red. Below it, a progress bar shows '0 Actions taken' with a question mark icon. A horizontal line separates this from a section indicating 'Only 25 more until our goal of 25' with an 'Edit' link. Below this, the 'Form Heading' field is circled in red. The form contains several input fields: 'First Name', 'Last Name', 'Email \*', and 'Zip/Postal Code \*', each with a 'Sample' button. At the bottom, there are links for 'Edit Form' and 'Add Custom Form HTML'. The submit button, labeled 'Add Your Name', is circled in red.

### 3. Edit Form

Then click **Edit Form** (as seen just above), which takes you to a drag and drop type page to add or remove questions from your form.

This part is hard to describe in words and images - so you need to just have a go. You can drag and drop any fields you don't want for your event (it's up to you). Just click on them and drag away from the left and let go.

In this example the surname and postcode have been removed and the GDPR field is being picked up and moved in to the form.

The screenshot shows a form builder interface. On the left, under 'Instructions', there are four bullet points: 'Add questions by dragging them from the right.', 'Edit questions by clicking on them below.', 'Delete questions by dragging them out of your form. Some questions (like email address) cannot be removed.', and 'Reorder questions by dragging them up or down in your form below.' Below this is a 'Your Form' preview with three fields: 'First Name', 'Email \*', and 'Country \*'. On the right, the 'Core & Custom Questions' panel is open, showing a search bar with 'gd' entered. A red circle highlights the search bar and the 'GDPR (GDPR\_consent)' question below it. Other questions listed include 'Interest\_Working\_Group', 'Working\_A&L', 'Working\_Admin', 'Working\_Arts', 'Working\_Comm', 'Working\_F', 'Working\_Legal', 'Working\_M&M', 'Working\_Political', 'Working\_RC', 'Working\_RegDev', 'Working\_Research', 'Working\_TT', and 'Working\_Talks'. Below this is a 'Blank Questions' section with options for 'Text Input', 'Text Area', and 'Radio Buttons'.

The fields can then be set to 'Required' if they are mandatory.

The GDPR consent field should always be set to 'Required'.

The screenshot shows a form preview with three fields: 'First Name', 'Email \*', and 'Country \*'. Below these fields is a text block: 'I give my consent to Extinction Rebellion to get in touch with me using the information I provide, for the purpose of news, actions and requests for volunteers and donations.' followed by a radio button and the text 'I agree'.

The screenshot shows a dialog box for setting a field to 'Required'. The 'Required' checkbox is checked and circled in red. Below it is an unchecked checkbox for 'Always Show'. There are two input fields: 'Show if the following field name:' and 'Has the value of:'. At the bottom, there are two buttons: 'SAVE' (blue) and 'CANCEL' (red). The 'SAVE' button is circled in red.

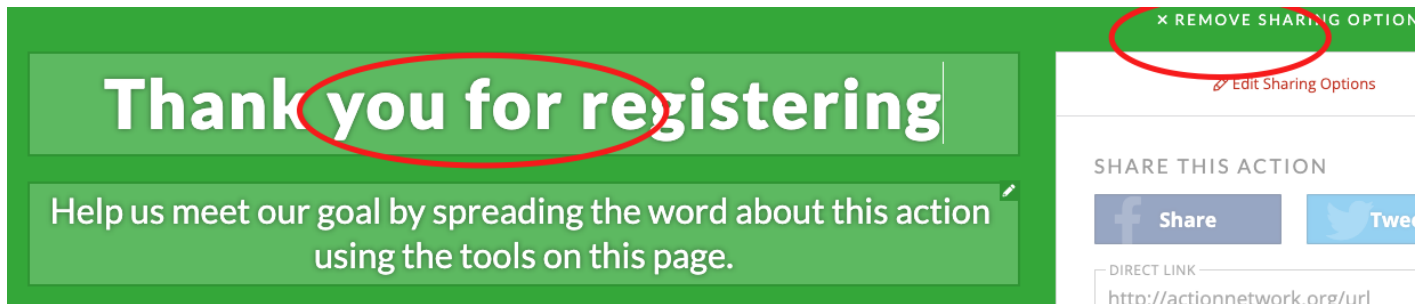
NOTE: Historically all admins could create questions and we've ended up with hundreds of questions with lots of overlap. So we are documenting a [list of some standard XRUK questions](#) that you can use.

You could also add your own questions at this stage, but note that the information will only be stored within the form answers, not with their activist record. It might be worth [requesting some training from the Action Network Data Team](#) to explain how all this works in more depth.

In the bottom right click 'SAVE AND PREVIEW' and 'SAVE AND GO TO NEXT STEP'.

## 4. Thank You page

To keep things simple - turn off the sharing options (you can investigate this later), and change the title to something that suits your form.



## 5. Write a short message

A screenshot of the message editor interface. At the top, there's a toolbar with options: HTML, Format, Align, B (bold), I (italic), S (underline), Lists, Image, Video, Table, Link, and Line. Below the toolbar, there's a text area with the placeholder text 'ADDITIONAL THANK YOU MESSAGE OR INSTRUCTIONS FOR YOUR ACTION TAKERS (OPTIONAL)'. The text area contains three lines of example text: 'Thank you for taking the the time to update your information.', 'or', 'Thank you for taking this survey', 'or', and 'Thank for volunteering for a role, we'll be in touch soon.'.

## 6. Click 'Save and Publish'

You form is now live, some last things to do are:

- add a nice page wrapper
  - The page wrapper gives your Event the 'XR Style' of font and colours and also this gets rid of all the Action Network branding at the top and bottom of the page. Swap from the default to the 'no logo' one.
- turn off or set up auto-reply emails (see next page)
  - Click on 'Responses'
  - As usual for an email - you might pick an appropriate wrapper ([contact data team](#) if you don't have the XR Wrappers), set up your subject, from and reply-to email correctly.
  - Click SAVE RESPONSES

## 7. Promote

Lear more about [advertising your event](#) in regards to URLs, preview images and tracking where sign ups have come from.

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If you need help with setting up a Form, please book a training or coaching session via our [Training Request Form](#), or [contact the Action Network Data Team](#).



# Online events

Guidance below focuses on events that point to a zoom link.

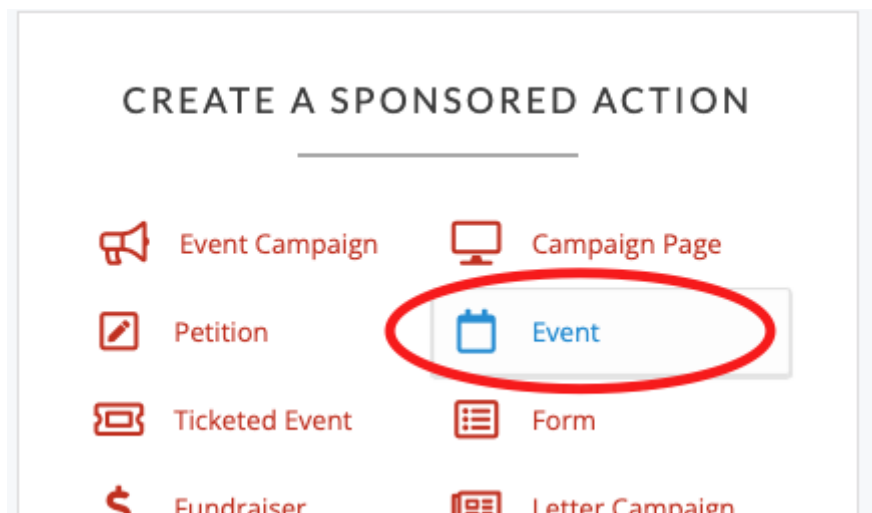
The zoom meeting link should be one that doesn't require the person to register (otherwise they'll end up having to register on the AN event AND again on the zoom link).

There are benefits to using Action Network *events* instead of sending people direct to a zoom registration. It enables you to easily see who has registered without having to download details from Zoom. Also it makes it easier to set up auto-reply emails, 24hr reminders and follow up emails.

**This page covers how to:**

- Create an Event (see below)
- Duplicate an existing Event - [watch this video](#)

## 1. Create an Event



## 2. Add the key details

Title, start and end time, zoom link and timezone

- title - keep it short and clear

- zoom link - this should NOT be a registration link (otherwise people will have to register here on the event and then again when they click the zoom)
- timezone - if your event date is within British Summer Time (then pick that time zone - see above) - otherwise choose Greenwich Mean Time.

TITLE OF YOUR EVENT \*  
 Heading for Extinction

☒ This Event is **Virtual**
☒ This Event Has An **End Time**

START DATE AND TIME \*  
 November 01, 2023 - 07:00 PM

END DATE AND TIME \*  
 November 01, 2023 - 08:30 PM

British Summer Time (GMT+01:00)

VIRTUAL EVENT LINK (OPTIONAL)  
<https://zoom.us/meeting/xxxxxxxxxxx>

### 3. Add some short text about the event and upload graphic

Write something a little shorter than you might do on a Facebook event or other advert - because by the time they've reached this registration page - they should already know something about what they are signing up for.

EDIT BANNER IMAGE

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

EVENT DESCRIPTION \*  
**This talk will change your life.**  
**Wednesday 29 November 19:00 - 20:30 UK time**  
 The talk is 1 hour with 30 mins for Q&A  
 Learn the truth about the climate and nature emergency and what we need to do.  
 Have you met anyone unsure about the severity of the crisis, and the need to take action? If so, point them this way! After attending this compelling talk, clearly based on the underlying science, they'll be left

### 4. Then the graphic

Upload an image or banner below. Your image should be 1500px wide by any height (600px is suggested). It will be scaled to a final size of 750px wide.

 HfE.jpg

Image Attribution 


ALT TEXT

Heading for Extinction 

OKAY!

## 5. Update the form data entry details

Check the button to 'Register' and then click 'Edit Form'

PROGRESS BAR 

ATTEND THIS EVENT

First Name

Sample

Last Name

Sample


Email \*


Sample

Zip/Postal Code \*

Sample


Not in the US?


 Edit Form

 Add Custom Form HTML

☐ Allow Attendees To Bring Guests

Register





## 6. Choose data fields

This part is hard to describe in words and images - so you need to just have a go. You can drag and drop any fields you don't want for your event (it's up to you). Just click on them and drag away from the left and let go.

In this example the surname and postcode have been removed and the GDPR field is being picked up and moved in to the form.

The fields can then be set to 'Required' if they are mandatory.

The GDPR consent field should always be set to 'Required'.

NOTE: Historically all admins could create questions and we've ended up with hundreds of questions with lots of overlap. So we are documenting a [list of some standard XRUK questions](#) that you can use.

You could also add your own questions at this stage, but note that the information will only be stored within the form answers, not with their activist record. It might be worth [requesting some training from the Action Network Data Team](#) to explain how all this works in more depth.

In the bottom right click 'SAVE AND PREVIEW' and 'SAVE AND GO TO NEXT STEP'.

## 7. Thank You page

To keep things simple - turn off the sharing options (you can investigate this later), and change the title.

**Thank you for registering**

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

**REMOVE SHARING OPTION**

Edit Sharing Options

**SHARE THIS ACTION**

Share

Tweet

DIRECT LINK

<http://actionnetwork.org/url>

8. Also you can write a message here e.g.

**Instructions For Your Attendees**

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

INSTRUCTIONS FOR YOUR ATTENDEES \*

**Thank you for registering for the Heading for Extinction talk**

**Wednesday 29 November 19:00 to 20:30 UK time.**

The talk is 1 hour with 30 mins for Q&A

Here's the Zoom link for the talk

<https://zoom.us/j/97382983438?pwd=WVBUM0hXWlhtSnJWNkFYUmFTZi9GUT09>

You will have received an email with this information and you will also get a reminder email the day before the talk.

We'll explain the science of the climate and nature emergency to understand the enormity of the

## 9. Click 'Save and Publish'

Your event is now live, some last things to do are:

- add a nice page wrapper  
The page wrapper gives your Event the 'XR Style' of font and colours and also this gets rid of all the Action Network branding at the top and bottom of the page. Swap from the default to the 'no logo' one.
- turn the discussion board off  
Click on Discussion and toggle off.

Page Wrapper: 2023 XR - no logo SAVE PAGE WRAPPER ?

Instructions Statistics RSVPs **Discussion** Event Info Sponsors Responses

Sharing & Tracking Next Steps

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**Discussion Board** ?

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Discussion Board is Disabled ☐ X

- set up auto-reply emails (see following page)
  - Click on 'Responses'
  - As usual for an email - you might pick an appropriate wrapper ([contact data team](#) if you don't have the XR Wrappers), set up your subject, from and reply-to email correctly.

☒ **Send An Email Response**

**i** Activists taking this action via **web** will receive the **email autoresponder**.

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Wrapper: 2023 - XRUK Talks and Training

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To: [Activist Name]

---

Subject: Heading for Extinction (and what to do about it) TALK on ZOOM

---

From: XR Talks and Training

---

Reply To: eventsxr@gmail.com

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- Then write the content of the email. Some of the default things on offer aren't very clear, so here is an example of a clear email.

ENTER THE BODY OF YOUR EMAIL HERE \*

Dear {{ FirstName | default: "Friend" }},

Thanks for registering to attend this **Heading for Extinction** talk.

**Wednesday 29 November 19:00 to 20:30 UK Time**

[Click here to join the Zoom talk](#)

{{action.calendar\_buttons}}

We look forward to seeing you!

**Extinction Rebellion Talks and Training Team**

- You can copy the same email or something slightly different for the 24hr before reminder email.
- Click SAVE RESPONSES

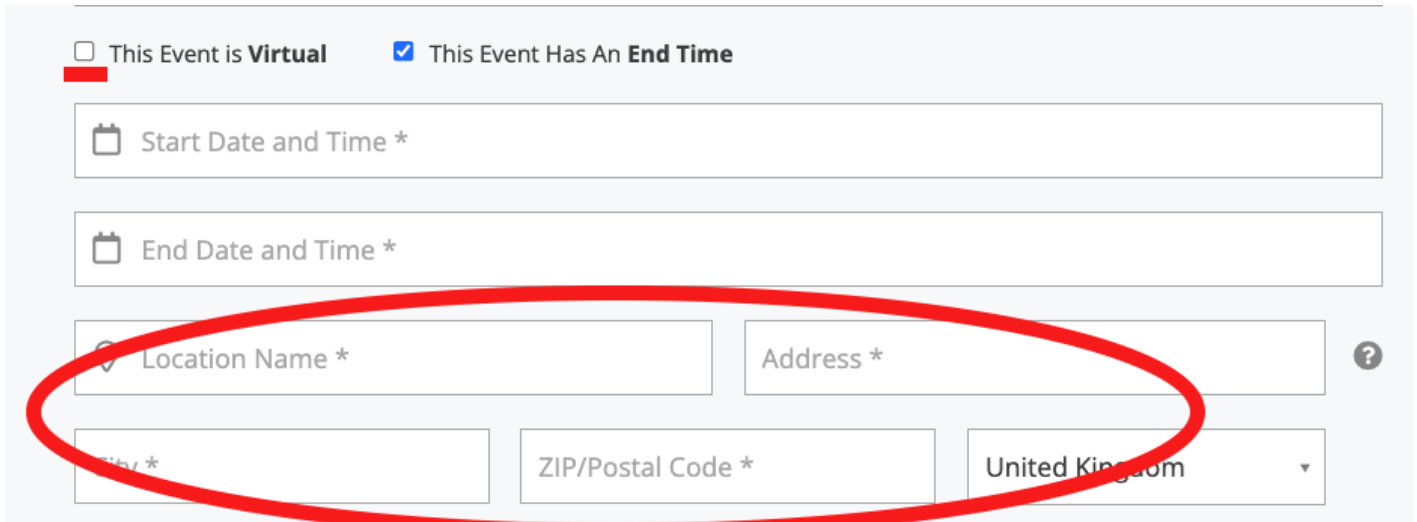
## 10. Promote

Lear more about [advertising your event](#) in regards to URLs, preview images and tracking where sign ups have come from.



# In-person events

The guidance for creating an in-person event is very similar to [creating an online event](#) - but in step 2 you just need to give the physical location of the event.



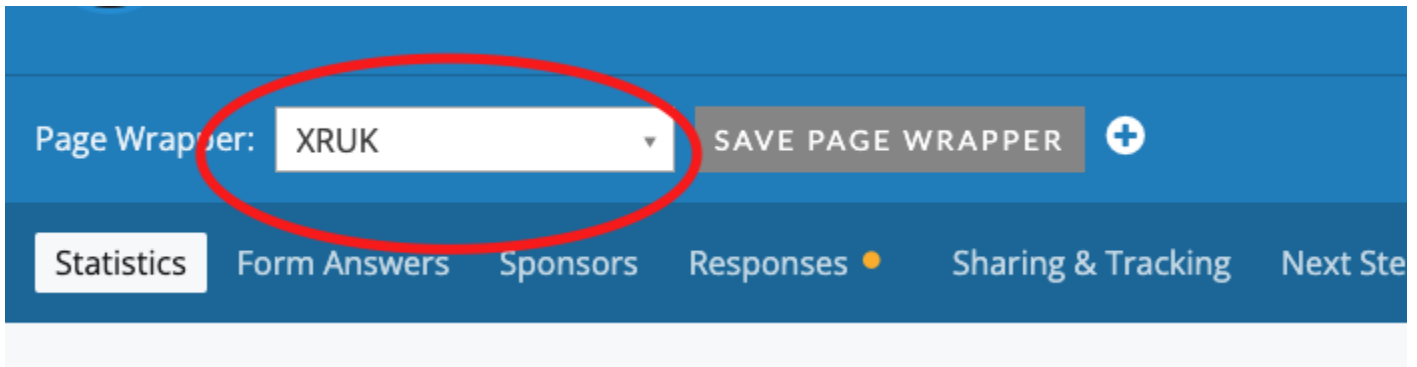
The screenshot shows a form for creating an event. At the top, there are two checkboxes: "This Event is **Virtual**" (unchecked) and "This Event Has An **End Time**" (checked). Below these are two date and time input fields: "Start Date and Time \*" and "End Date and Time \*". A red circle highlights the location section, which includes a "Location Name \*" field, an "Address \*" field, a "City \*" field, a "ZIP/Postal Code \*" field, and a "Country" dropdown menu currently set to "United Kingdom". A help icon (?) is visible next to the address field.

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If you need help on this, please book time on our [Training Request Form](#), or [contact the Action Network Data Team](#).

# Page Wrappers

The default for any new event or form is for it to have Action Network branding at the top and the bottom. You can easily remove this by applying a 'page wrapper'. There is an XR wrapper created for you to use (with and you apply it once your event or form is published by going to 'manage' the event/form and you'll see the open to apply the wrapper...



Page Wrapper: XRUK

SAVE PAGE WRAPPER +

Statistics Form Answers Sponsors Responses • Sharing & Tracking Next Step

This changes your form from looking like this:

START ORGANIZING:

ACTIONS

PEOPLE

DETAILS

SUPPORT

GO TO A GROUP

XRUK Accessibility

Hello!

You have, at some time, given your email address to us. It will have been regarding access support or to do with Disabled Rebels Network.

We are updating our mailing list so that you can choose what you would like to receive information about, or opt out altogether.

Please complete and submit this form. You don't have to fill in every box, just the ones with the asterisk.

Hope to hear from you,

XRUK Action Wellbeing and Disabled Rebels Network

SPONSORED BY

XR ACCESSIBILITY

8 Actions Taken

Only 17 more until our goal of 25

XRUK ACCESSIBILITY

First Name

Last Name

Mobile Number, 07400 123456

Email \*

Not in GB?

Would you like emails about access information and support at XRUK events and actions? \*

☐ Yes
 ☐ No

Would you like emails about Disabled Rebels Network events and meetings? \*

☐ Yes
 ☐ No

If you would like to, tell us about your access needs.

Add you access needs here

GDPR Permission: I give my consent to Extinction Rebellion to get in touch with me using the information I have provided in this form, for the purpose of news, updates, and rebellion. \*

☐ I agree

SUBMIT

You may receive email updates from XR Accessibility, the sponsor of this form.

Edit Subscription Preferences

**What to expect:** If you wish to withdraw your consent and stop hearing from us, simply click the unsubscribe link at the bottom of every email we send or contact us at [dataprotection@rebellion.earth](mailto:dataprotection@rebellion.earth). We value and respect your personal data and privacy. [View our privacy policy](#). By submitting this form, you agree that we may process your information in

To looking like this:

## XRUK ACCESSIBILITY



Hello!

You have, at some time, given your email address to us. It will have been regarding access support or to do with Disabled Rebels Network.

We are updating our mailing list so that you can choose what you would like to receive information about, or opt out altogether.

Please complete and submit this form. You don't have to fill in every box, just the ones with the asterisk.

Hope to hear from you,

XRUK Action Wellbeing and Disabled Rebels Network

8 Actions Taken

Only 17 more until our goal of 25

### XRUK ACCESSIBILITY

First Name

Last Name

Mobile Number, 07400 123456



Email \*

Not in GB?

Would you like emails about access information and support at XRUK events and actions? \*

- ☐ Yes  
☐ No

Would you like emails about Disabled Rebels Network events and meetings? \*

- ☐ Yes  
☐ No

If you would like to, tell us about your access needs.

Add you access needs here

GDPR Permission: I give my consent to Extinction Rebellion to get in touch with me using the information I have provided in this form, for the purpose of news, updates, and rebellion. \*

- ☐ I agree

SUBMIT

You may receive email updates from XR Accessibility, the sponsor of this form.

[Edit Subscription Preferences](#)

**What to expect:** If you wish to withdraw your consent and stop hearing from us, simply click the unsubscribe link at the bottom of every email we send or contact us at [dataprotection@rebellion.earth](mailto:dataprotection@rebellion.earth). We value and respect your personal data and privacy. [View our privacy policy](#). By submitting this form, you agree that we may process your information in accordance with these terms.

## Viewing on a phone

The effect of a page wrapper is even better when viewing on a phone, because it removes very distracting 'login or sign up' at the top. This option is attempting to get someone to sign up for an Action Network account - which is entirely unnecessary and a huge distraction from your own action/form/event sign up.

## XRUK Accessibility

7 Actions Taken



Only 18 more until our goal of 25

### XRUK ACCESSIBILITY



Not in GB?

Would you like emails about access information and support at XRUK events and actions? \*

☐ Yes☐ No

Would you like emails about Disabled Rebels Network events and meetings? \*

☐ Yes☐ No

If you would like to, tell us about your access needs.

## XRUK ACCESSIBILITY



Hello!

You have, at some time, given your email address to us. It will have been regarding access support or to do with Disabled Rebels Network.

We are updating our mailing list so that you can choose what you would like to receive information about, or opt out altogether.

Please complete and submit this form. You don't have to fill in every box, just the ones with the asterisk.

Hope to hear from you,

XRUK Action Wellbeing and Disabled Rebels Network

8 Actions Taken



Only 17 more until our goal of 25

### XRUK ACCESSIBILITY



# Useful fields and questions

All these questions are available to all groups using the the XRUK network

When you [use these questions in your forms/events](#) the data you collect will be added to subscribers record.

You can also create your own questions in a form or event, but these will just be held within the 'action' itself (this is more suited to temporary information e.g. to ask people what shifts they could cover when stewarding for an action with options of 12-2pm, 2-4pm, 4-6pm)

If you need help on this, please book time on our [Training Request Form](#), or [contact the Action Network Data Team](#).

## Commonly used questions

If you have an idea for a question that could be useful system-wide then [get in touch](#). If you feel like you need the freedom to create your own questions, [read more here](#)

## QUESTIONS

A shortlist of most useful questions. These are questions that can be added to forms or events.

- **GDPR\_UK** - For use on UK forms, it add "GDPR\_Policy\_V3" to the field 'GDPR\_consent'. Essential for every form and should be set as 'required'.
- **Which Region** - Drop down menu of options of every nation or region and an 'other/nomad' category too. This adds the chosen option to a field called 'Region'. *Apologies for this question and field being just called 'Region' and not NationRegion.*
- **Mattermost Handle** - This is a free text field of the same name, for someone to enter their mattermost handle.
- **Event Attended** - This is a free text field that you could use on forms you set up for helping you with data entry of paper sign up sheets. Data added to the field 'event\_attended'.
- **Local XR Group 2024 dropdown** - Useful for UK, Action Support or other UK-wide lists, to pick up information on the person's local group. Note: nothing happens when they fill this is, there is no coding that automatically subscribes them to that LG email list. It's just

for information only.

- **Principles and Values** - This give a link to the P&Vs on the website and asked for use to tick if they agree with them. Then it tags their activist record with 'P&Vs\_agreed'.

## CUSTOM FIELDS

A shortlist of most useful custom fields. You can view the data in custom fields via reports or by looking at an individual activist record.

- **WestminsterConstituency** - these are maintained by the Action Network Data Team and are based on the postcode core field. So data will only be available if people have given us their postcode.
- **Region** - this data is added via a project to the whole user database in relation to what LG a person was signed up to and also collected via user input, in particular on volunteer role forms.
- **Local XR Group** - this data comes from user input via the dropdown question (listed above).

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[Contact the Action Network Data Team](#) if you are looking for a question to use on your form that you can't find.

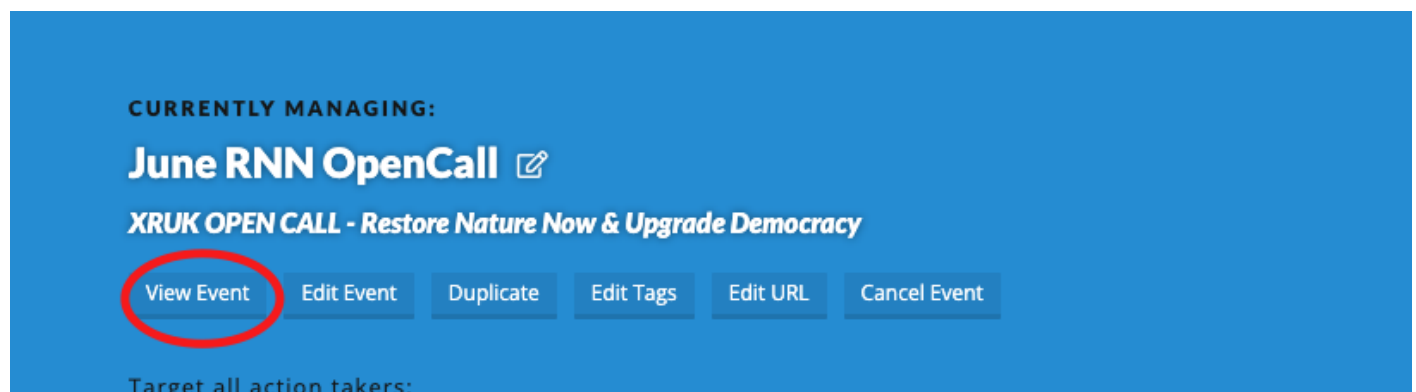


# Advertising your event

## URLs, adding preview graphics and tracking sign ups

### Links to use when advertising your event or form

After you've set up your event (or form) - you can find it's URL which you can see when clicking 'View Event'.



You can use this link to advertise your event.

**For Action Network emails** use the full link: <https://actionnetwork.org/events/yourevent>

But beware of copying links out of an email you've been sent - some [info on a major issue](#) if you copy links from one email to another.

**For sharing on social media or Telegram/WhatsApp chats etc**

You can [turn this URL in to a shortlink](#) - but it is not recommended to use this shortlinks within AN emails, just hyperlink the original URL.

## Preview graphics

This is the image that will automatically show through to channels such as Telegram or WhatsApp as a kind of thumbnail image when you post the URL link.

The image preview for your form comes from the '**Sharing and Tracking**' tab. If you add an image to the Facebook sharing information. It's particularly important to check this if you've duplicated a form, as the previous information/image will still be in this 'Facebook' sharing info.

Click 'SAVE OPTIONS' after updating.

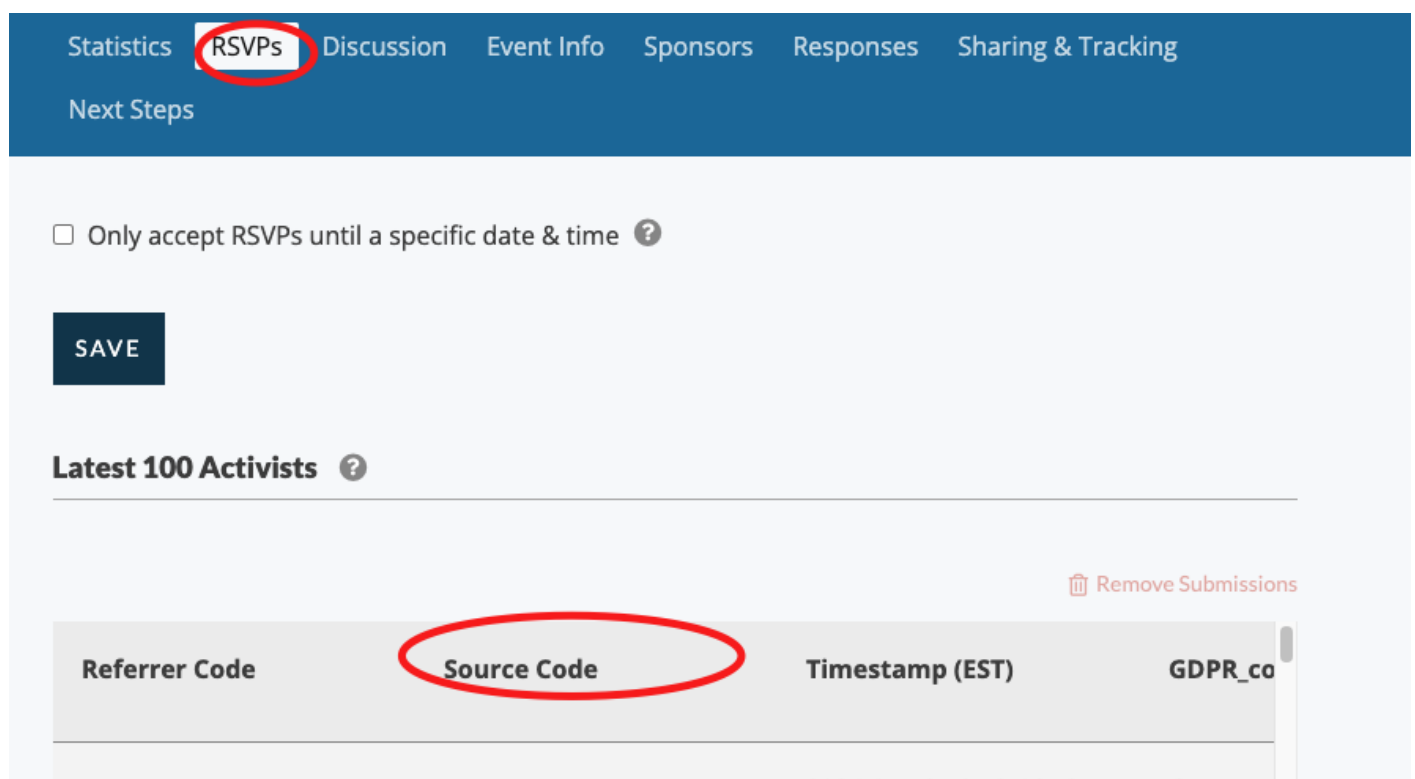
Here is some advice for if you've already shared a link on Telegram before fixing this and need to [refresh the graphic preview](#).

## Tracking

If you are interested in knowing WHERE your signs up have come from then read on

You can add a parameter called 'source' to the end of your URL and using the example above, this would look like **<https://actionnetwork.org/events/yourevent?source=UKemail>**

The source parameter can then be seen when you are 'managing' your event by looking at the 'RSVPs'.



Statistics **RSVPs** Discussion Event Info Sponsors Responses Sharing & Tracking

Next Steps

☐ Only accept RSVPs until a specific date & time ?

SAVE

Latest 100 Activists ?

Remove Submissions

Referrer Code	Source Code	Timestamp (EST)	GDPR_co
		2024-05-13 10:13:16 EST	GDPR_D-

If you'd like monitor the effectiveness of advertising between your email list, facebook, website and your group chat you could use different source codes.

?source=email

?source=chat

?source=facebook

?source=website

# Pre-fill data in a form

This will only work with **custom fields** in your form (not core fields or action-only fields)

- If the field name has spaces in it, then you need to use %20 in the URL for each space.
- If the URL is case sensitive, e.g. use Region, not region if you were to pre-fill that particular field

A current example of this is the volunteer form for Upgrade Democracy and here is a URL that allows for the first question to be auto-filled.

The custom field is `ASUD_PrefRole` and the url mechanism is

```
source=ASUD_PrefRole=Steward
```

Here is the full URL (with an extra source parameter showing the person is signing up from the Rebel Toolkit):

```
https://actionnetwork.org/forms/upgrade-democracy-crew-signup?source=RTUDCrew&ASUD_PrefRole=Steward&
```

You can see this and various other pre-selected choices on the Upgrade Democracy [volunteering page](#)

[More information on custom fields is here](#)