ACTION BUILDER
CAUCUS GUIDE

WHAT IS ACTION BUILDER?

Brought to you by the not-for-profit, unionized team that developed Action Network, we started development of Action Builder in August 2017 with the AFL-CIO as our cooperative development partner. The gap we were looking to fill: an easy to use, unintimidating organizing tool, designed to log conversations and power building on the fly, from a phone, tablet or laptop. Action Builder was released to the progressive community in March 2019 and is currently used by dozens of unions and community groups to organize their members and grow leaders.

In the summer of 2018, we were lucky to hire Michael Crusinberry, who immediately saw the potential of this tool for party building and for solving the long time challenge of checking folks in on caucus night. Working in close cooperation with the party, we have added new features specifically to make caucus night check in as easy and seamless as possible.
GETTING STARTED

This guide walks through how to use Action Builder for caucus sign-in and data entry. Please note, the tool is constantly evolving, and there are several ways the system will be becoming more user friendly before February 25th. Do not be alarmed if some screenshots look slightly different when you log in. You can view up-to-date video trainings on the DFL Training Hub.

SIGN IN TO ACTION BUILDER

You will be sent a login email from the tool in the days leading up to the caucus, which will include a link to set up your account. No need to download an app! This tool lives in your phone, laptop or tablet's mobile browser. Please make sure the email you send the party to log in is one you can access, and ensure that your caucus location has decent wifi or 3G wireless. An internet connection is necessary to use the tool.

Account invites do expire after 3 days. If your account link has expired, you can go to dflcaucus.actionbuilder.org and use the “Forgot Password” link and your email to get a new invite sent to you. Once you find the email, click the link to set a password and log in.

NAVIGATE TO TASKS

When you first log in, you’ll need to navigate to the Tasks menu. Click the three dots in the top right of the screen and select the option for Tasks.
Once in the task menu, you should see a task for sign in. If you don’t see the task, ask your site lead to make sure you have access.

**SIGN IN PROCESS**

Once in the task, you will see a list of all registered voters with a search bar on top.
As people arrive, ask them which name they used to register to vote. Then use the search bar to type the name of the person who you are signing in. If you have trouble finding a name, type the first few letters of their last name, or first name, whichever is less common.

When the person appears, click on the name and ask the person to confirm their information. Click ‘Add’ to the right to add new contact information, and the three small stacked dots to mark email, address or phone number as ‘bad’.

Scroll to the bottom and once the person has agreed to the “affirmation statement” click confirm and welcome the person to their caucus.

Once the individual is signed in, their name will appear in darker grey to signal that they have been signed in.

If the individual does not show up on the search bar, some user accounts will have permission to add them as a new person. Some caucus sites will be encouraged to have new registrants sign in on a blank registration form instead, and do the data entry on new registrants after caucus night.
ADDING A NEW PERSON

Users will need an “Organizer” account in order to add a new person. If you have this account type, you can add a new person by clicking on the Add New Person button to the right of the search bar. Fill out the form with First Name and Last Name, then click Create Person at the bottom.

Once you click ‘Create Person’ you will see a page that looks the same as the ‘Confirm’ step above. There you’ll have the option to add contact information, add precinct, and select Confirm to check them in. Because this is a mobile friendly tool, if you are on a phone or tablet, you can also give them your device to add their own contact information.

If a person with an “Organizer” account is not available simply have the person write their information on one of the blank registration forms.
POST CAUCUS DATA ENTRY

Action Builder will also be used for post-caucus data entry, including adding delegates and alternates, election judges and other designations.

Entering the data after caucus will follow a similar process to sign in on caucus night. Navigate to Tasks and find the Task for sign in. Search for the individual and click on their name or use the add new person button if they do not appear. On the next page, you’ll see a variety of sections that you can add information to, including the ability to add information about if they are a delegate or alternate. Click the add button next to a section, then select the appropriate response and hit save.

After you’ve entered all the information, you can use the confirm button at the bottom to save the data.

Organizing units will have up to 10 days after the caucus to enter their information.
The DFL and ActionBuilder are committed to the success of this tool and will be providing a variety of different trainings for you in the coming weeks and months. To get started, we will be posting a training video in the Training Hub that you can show your Organizing Unit Central Committees, and we’ll be providing PDFs and In Person’s trainings through the next few weeks. If there are training materials that you need, please contact DFL Training Director Sonja Johnson (sjohnson@dfl.org).

We will also be providing test accounts with mock data for Organizing Units that want to get a hands-on experience. We’ll be creating accounts in two waves. Please email DFL Voter File Manager Collin Murray (cmurray@dfl.org) by Dec 12th in order to get accounts by Dec 17th or by Jan 3rd to get accounts by Jan 9th. **Please note that test accounts will not work for the caucus! You will get a different account to use on caucus night.**

As you're testing the tool or when you're using it on caucus night, please email Collin with any issues, or call the DFL at 651-293-1200 and ask for Collin.