AB to AN

Action Builder to Action Network Sync Worksheet

[Setting up the Integration] / [Sync FAQs]

Note: This worksheet assumes your API key and sync has been turned on under “Customize.”

<table>
<tr><th>Question</th><th>Answer</th></tr>
<tr><td>Who do you want to contact?

Example:
- All supporters
- Everyone in a particular department
- Everyone on a particular committee</td><td></td></tr>
<tr><td>What Assessment(s) or response(s) do they have on Action Builder?

Example:
- Assessments 1 and 2
- Clerical Department
- OC Member</td><td></td></tr>
<tr><td>How will you connect that info from AN to AB?</td><td><table><tr><td>AN Tag</td><td>AB Assessment or Response</td></tr><tr><td></td><td></td></tr><tr><td></td><td></td></tr></table></td></tr>
<tr><td>Final steps</td><td>☐ Make sure everyone with response(s) are subscribed
☐ Target e-mail based on AN Tag</td></tr>
</table>

AN to AB

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<table>
<tr><th>Question</th><th>Answer</th></tr>
<tr><td>What information do you want to gather through AN?

Examples:
• Petition signers
• Membership or affiliations to groups
• Job Titles (free text)
• Issues (free text)</td><td></td></tr>
<tr><td>What type of AN Action will you use to collect that information?

Examples:
• AN Petition
• AN Form
• AN Survey</td><td></td></tr>
<tr><td>How will you connect that info from AN to AB?</td><td><table><tr><td>AN Tag</td><td>AB Response</td></tr><tr><td></td><td></td></tr><tr><td></td><td></td></tr></table></td></tr>
<tr><td>Where will the AN Tag live on your AN Action?

Examples:
• The Action itself
• Tag Question
• Custom Field</td><td></td></tr>
<tr><td>Where will you place the magic tag?</td><td>• On the AN Action
• As a tag question</td></tr>
</table>