

Digital Tool Walkthrough

How this document works

This document is a basic walkthrough of ActionBuilder. If you're looking for guidance on other digital tools, [go here](#) to find the resource you're after.

What's in the doc

Digital Tool Walkthrough	1
How this document works	1
What's in the doc	1
What does ActionBuilder do?	1
The walkthrough of ActionBuilder	2
ActionBuilder	2
At a glance	2
Logging information or tracking	3
Flagging for follow up	6
Add new company manually	6
Searches and queries	7
How to get more support	9

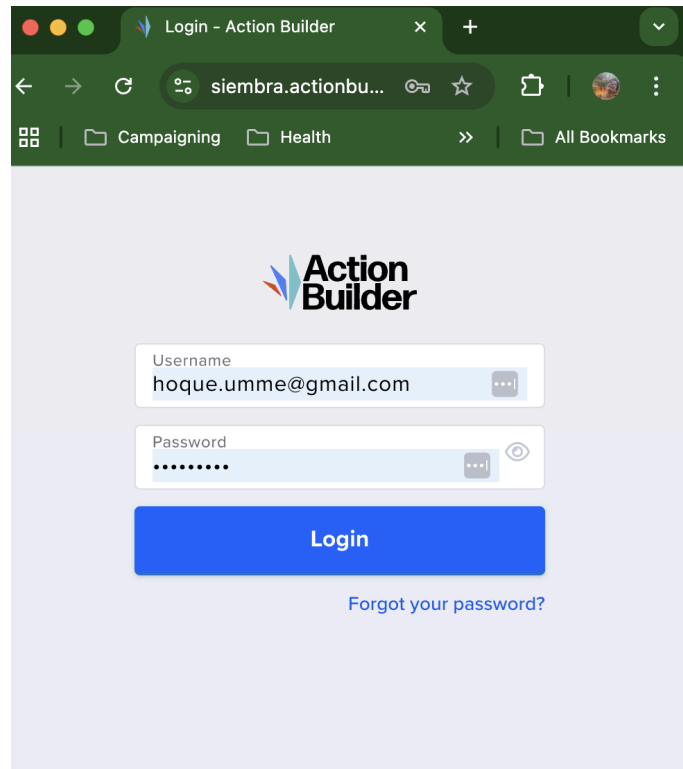
What does ActionBuilder do?

[ActionBuilder](#) is where our list of workplaces that have been identified or canvassed are. It's also where all people in NC are, and shows what they've been involved in, signed up for, or the latest contact with them.

The walkthrough of ActionBuilder

ActionBuilder

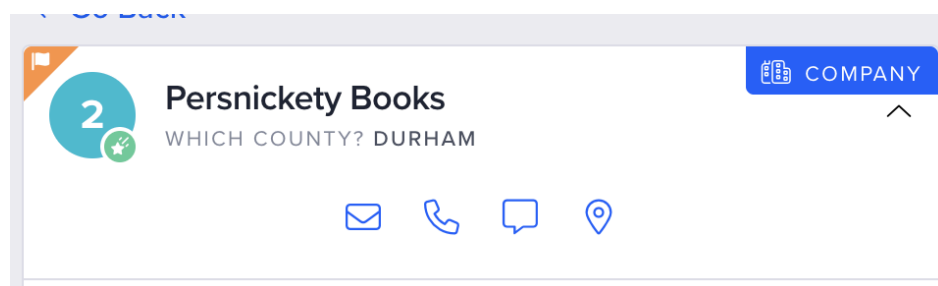
Login at <https://siembra.actionbuilder.org/>



At a glance

There are two ActionBuilder databases, and depending on your role, you'll have access to one or both of them. Updating information is the same in both.

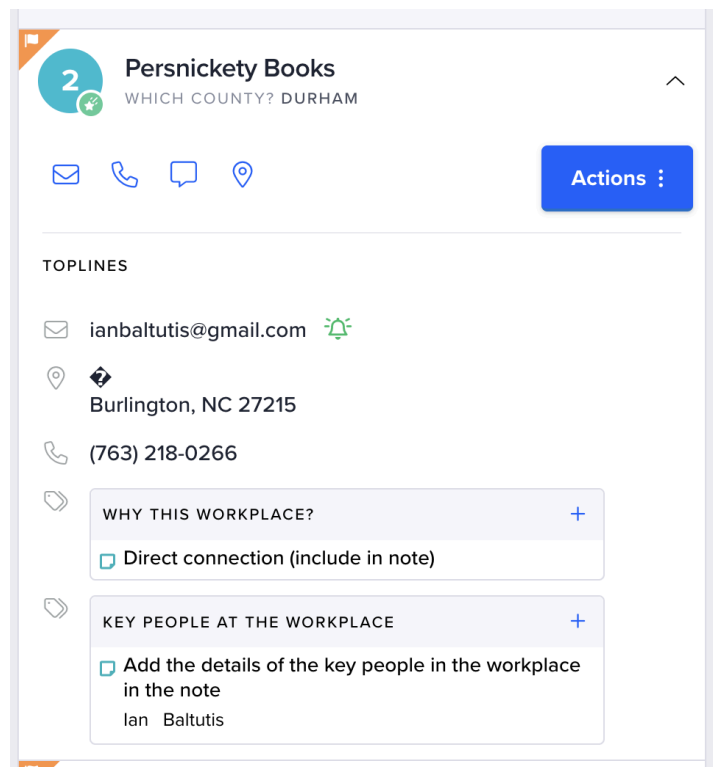
For workplaces: When you login, you'll be able to see a full list of all of our workplaces. At a glance, you'll see which county they're in, any flags on them, and workplaces that have a star on them have signed up to be Fourth Amendment Workplaces.



The following ranking scale is being used for workplaces:

1. Signed up to be a Fourth Amendment Workplace and has completed all the steps
2. Signed up to be a Fourth Amendment Workplace and needs follow up to move to a 1 and be fill signed on!
3. Almost a Fourth Amendment Workplace but needs a few more conversations or info to sign up
4. Has said no to being a Fourth Amendment Workplace but isn't hostile
5. Has said no to being a Fourth Amendment Workplace and is hostile or aggressive

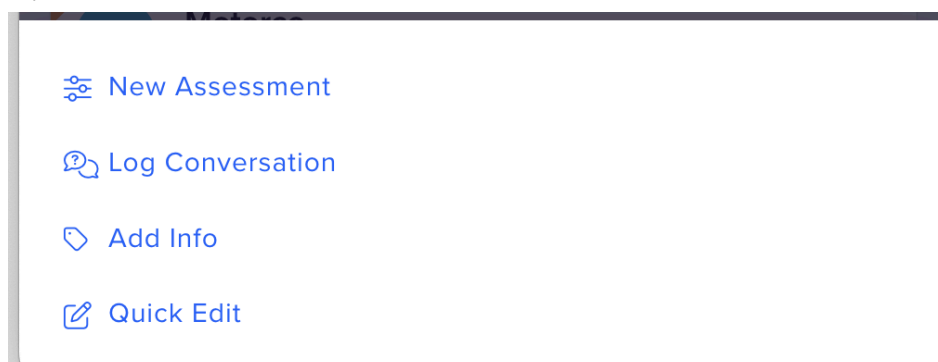
When you click on the drop-down next to a workplace name, you can see basic information about them.



For people, when you login you'll see everyone in North Carolina. Looking for their county will help you narrow down the list to whomever you need to talk to.


Logging information or tracking

Clicking actions will allow you to take fast action – log a conversation, update an assessment, or add information.








Clicking on the company name will bring you into their full profile view. At the top of the info, you'll see key info about them.

← Go Back





American Tobacco Underground
WHICH COUNTY? DURHAM









COMPANY

TOPLINES


 info@americanunderground.com

 201 W Main St
Durham, NC 27701

 [Add Phone](#)






 WHY THIS WORKPLACE? [+](#)


☐ Direct connection (include in note)

 KEY PEOPLE AT THE WORKPLACE [+](#)

☐ Add the details of the key people in the workplace in the note
 Amanda may be a key contact; just met and need to interact and connect further.

ACTIONS

 [New Assessment](#)
 [Log Conversation](#)
 [Add Info](#)
 [Merge](#)
 [Remove From Campaign](#)

 Flag for follow-up

And scrolling down you'll first see all the basic contact information.

PROFILE ACTIVITY INFO NOTES

NAME [EDIT](#)

NAME American Tobacco Underground

EMAIL ADDRESSES [+ ADD](#)

info@americanunderground.com	Home	User Added	Edited 5 days ago	...
------------------------------	------	------------	-------------------	-----

PHONES [+ ADD](#)

ADDRESSES [+ ADD](#)

201 W Main St Durham, NC 27701 NC-CD-4 · NC-HD-30 · NC-SD-22	Physical	User Added	Edited 5 days ago	...
--	----------	------------	-------------------	-----

SOCIAL [+ ADD](#)

ENTITY IDS

Action Builder ID	d18dfed6-27dd-41b8-a45b-df775173c418
-------------------	--------------------------------------

Clicking info is where you can see all the key info – who identified them, when and how, what the latest convo was, and what follow up is needed. This info is all information you and add and edit too. The screens look slightly different between people and workplaces since we're gathering different information.

About the Company

DATE OF ID OR ENGAGEMENT		+ ADD
Date identified	Mar 30, 3035	5 days ago ...
HOW WE IDENTIFIED THE SITE?		+ ADD
Online form		5 days ago ...
IDENTIFIED BY		+ ADD
Include their name and contact info in the note	Oscar Romero Jorge oscarrom@gmail.com	5 days ago ...
IS A 4AW WORKPLACE?		+ ADD
KEY PEOPLE AT THE WORKPLACE		+ ADD
Add the details of the key people in the workplace in the note	Amanda may be a key contact; just met and need to interact and connect further.	5 days ago ...
MNCW PERSON TO TALK TO FOR FOLLOW UP		+ ADD
NEXT STEP / FOLLOW UP NEEDED		+ ADD
TYPE OF WORKPLACE		+ ADD
Store		5 days ago ...
WHAT DO THEY NEED TO BECOME A FULL 4AW SITE		+ ADD
WHICH COUNTY?		+ ADD
Durham		5 days ago ...
WHY THIS WORKPLACE?		+ ADD
Direct connection (include in note)	Add a note for this response.	5 days ago ...

Clicking notes is where you can read any notes and also add your own.

Flag for follow-up

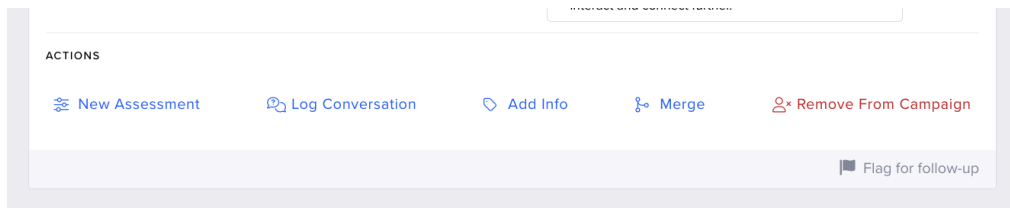
PROFILE ACTIVITY INFO **NOTES**

+ Add Note

Search notes...

Flagging for follow up

If you need to follow up with the workplace, click on *flag for followup*.



Depending on your role, you'll flag people for follow up to follow up businesses to move from a 2 to a 1 by getting their posters, or you might flag a company for a canvasser to follow up.

This will bring up a popup where you can add a note and assign them to someone. That person will get an email saying they have an assignment. You should also send them an email or text so they know to look for that, as sometimes people miss it!

A screenshot of a popup form titled 'Flag American Tobacco Underground for follow-up'. The form has a dark gray border and a close button (X) in the top right corner. It contains a 'Note (required)' field with the text 'This is a note!' and a 'Assign to user' field with the text 'Umme Hoque'. Below these fields is a blue button labeled 'Save Flag'. A note above the fields states: 'Note: Adding a new flag for American Tobacco Underground will complete existing follow-up flags.'

Add new company manually

Outside of profiles, you can click on add new on the landing page to add a new company manually. By doing this, you can add all needed information, and if you've just canvassed them, you can add the next step information too.

Searches and queries

If you're looking for someone, you can use queries to do so.

You can filter for companies that have certain fields or information in the "info" field. The most common things you might look for are probably county or engagement date.

You can also search by location or other fields here:

in the previous Days ▼

LOCATION

Zip / Postal Code

City, State

States

ELECTORAL DISTRICT

Electoral District

IN USERS ASSIGNMENT

Search Users

IS USER

☐ USER ☐ NON-USER

CANVASSED

Canvassing attempts ▼

Canvassing type ▼

NAME

First Name

Middle Name ☐ Is blank ⓘ

Last Name ☐ Is blank ⓘ

Preferred Name ☐ Is blank ⓘ

And if you just want topline information, like to search for folks assigned to you, or companies that only have been assessed “2” you can easily do that in this section.

COMMON FILTERS ⌵

ASSESSMENT

ENTITY TYPE

Entity Type ▼
Company

FLAGGED FOR FOLLOW UP

COMPLEX FILTERS

To do any search, you need to click “run query.” You can click “reset” to clear any filters.

You can search for all kinds of things – basic searches by location or certain profile information; anything in info & fields under the info & connections section to target your list by people who have done or said certain things; and whomever has been tagged by or for you under common filters.

Those are the big things! If you think we need fields added, changed, or the view altered, reach out to your digi team using the contact information below.

How to get more support

Having problems with the digital tools, accesses, lists, or just annoyed?! Check out: [ActionBuilder documentation](#)

Or email digital@siembranc.org, and your friendly digital team will help out! Please note that the team will take a few days to get back to you – if it's urgent, ask Andrew or Anahí to also ping umme.