

Getting started with Action Network

Briefing for Local Green Parties

Feel free to download this doc or suggest edits/add comments to it (click on the symbol that looks like + in a speech bubble). It will be updated as needed.

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Lots of support is available!

This informal training/briefing is not a substitute for reading the excellent guidance on the GPEW digital support site:

<https://support.greenparty.org.uk/portal/en-gb/kb/the-green-party/action-network>

Screenshot below - note the 'Search Articles' function!


Green Party Digital Support

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Action Network Fundame...

Just getting started with Action Network?
Here's where you'll find all the basics.

- Requesting Access To The Action Network Files Feature
- What is Action Network?
- What Is 2-Factor Authentication & Should I Enable It?
- When Will My Action Network Group Be Enrolled In Two Factor Authentication (2FAMFA)?
- How To Hide Reports, Actions & Emails

[More →](#)


Action Network Email

Action Network Email

- Verifying & Managing Your Action Network Reply-To Email Addresses
- How To Send An Email Which Targets Only Your Current Local Members
- How Can I Send Meeting Notes Or Other Documents Via Action Network Email?
- Resubscribing Activists With Spam Complaints Or Bouncing Emails
- Action Network Email Tips

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Branding & Customisation

Branding & Customisation

- Using & Customising GPEW-Issued Email Layouts
- How To Set Up A Basic Page Wrapper
- Using & Customising GPEW-Issued Page Wrappers


People

People

- How Do I Update A Member's Contact Details?
- How To Merge Duplicate Activists In Action Network
- Why Do Some Current Members Have Membership_End_Date Values That Are In The Past?
- Why Do Some Activists Have Duplicate Records In Action Network?
- Why Are There Two Activist Searches In Action Network, And How Are They Different?

[More →](#)


Actions

Actions are the heart of Action Network, and how you engage with your activists through events, forms, fundraisers and more.

- Creating An Action Network Fundraising Page
- Duplicating An Action Network Fundraising Page
- Creating A Form In Action Network
- How To Use Action-Only Custom Fields
- How To Issue Refunds, Re-Issue Receipts or Convert One-Off Donations To Recurring Gifts

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Who are our 'activists' on AN?

- Green Party **members** (membership status = current, pending and grace) - i.e. people who pay a subscription to GPEW. 'Pending' members are new, and 'grace' means their membership has lapsed within the last 6 months.
- Non-members AKA **supporters**. These include former members and people who have signed up for an event and ticked the box to say they are happy to hear from us. Sometimes they are members using a different email address to the one associated with their membership.
- Some from each category have **unsubscribed** themselves from local party emails, or been unsubscribed by AN because of bounces.
- You should only **resubscribe** people with their permission (click on their activist record and click subscribe to email (in left hand menu) - changes red cross to green tick). If they were unsubscribed due to email bounces or a spam complaint, you have to email Action Network first, to show that the person has asked to be resubscribed.

- You may have people on your email list who live **outside of your local party** – e.g. students, diaspora, neighbours, people who signed up to one of your events in the past.
- You can add supporters yourself, and actively seek more supporters by creating a **sign up form** ([example](#)) and putting the link & QR code in all your literature. [QRcodemonkey](#) is recommended for creating a free QR code that won't expire.
- You can also [remove activists](#) (preferably by notifying the Digital Support Team) if their inclusion on your list is problematic.

Data accuracy

Over time, the data gets out of date - e.g. as people move without updating their address. There are **lots of errors**, and some **duplication**!

If you ever want to send out a physical letter (e.g. candidate selection ballot paper to members without email), best to cross-reference with the electoral register first.

If you know someone has **moved**, best to ask them to update their own address. If we try to do it in AN, the data can get overwritten next time a payment is taken from them. They need to update their Billing AND Shipping addresses at:

<https://greenparty.chargebeeportal.com/>

If all else fails, email members@greenparty.org.uk

Who are your local party's AN organisers & administrators?

Organisers have limited permissions - e.g. can set up an event but can't access activist data or launch emails.

Administrators have more permissions – e.g. launch emails, search and edit activists, create reports, etc. Permissions can be tailored to each person's role. Ideally have at least one person in your LP who can add and change permissions for others.

Organisers and administrators must login to AN with their personal email address (associated with their membership), not with a role-based GP email address, and must also set up 2-factor authentication for extra security.

Very useful functions in AN

- 1) **Reports:** set up a query and create/download a list of members and or supporters based on ward, constituency, LP, membership status, etc.

- 2) **Emails:** send personalised messages to specific groups and reach the right people at the right time.
- 3) **Ladders:** set up a series of automated emails - e.g. to welcome new members to your local party.
- 4) **Tags:** identify current LP Officers so that GPEW can communicate with the right people (e.g. finance office can liaise with treasurers).

ACTIONS (not covered in detail in this briefing):

Other platforms are available for all these things but doing them through AN makes it easy to build your supporter list.

- 5) **Events:** create free or paid-for (ticketed) events for people to sign up to. Share on social media or through email to increase visibility and participation.
- 6) **Forms & Surveys:** Gather feedback or supporter sign-ups using a single question or a multi-page survey – fully customisable.
- 7) **Fundraising:** Create donation forms and manage fundraising campaigns. You'll need to set up a Stripe account for your local party, to process payments.

1) Reports & Data Protection

Use **queries** to set up all the reports that you are likely to need regularly - e.g. all members (current, grace and pending), [new members \(last 7 days\)](#), members in XXX ward etc. You can **highlight** the most useful few on your AN dashboard.

Here's a guide to some [frequently used queries](#).

Take care over AND/OR combinations of query parameters. If your report gives you 0 results you might have asked for membership status = current AND grace (instead of current OR grace). You can drag or delete the fields if they are not in the right position to produce the AND/OR combination that you want. You can also use include/exclude to refine your query.

To create an updated version of a correctly set-up report, click **Refresh Targeting** (*not Duplicate This Report!*), then **generate** new version and **download** it as a csv file if needed. Once downloaded, save it into a folder on your hard drive as an excel file with a sensible name (e.g. Marsh_ward_members_22.10.25.xlsx), and regularly delete outdated data files. Excel files are easier to edit than .csv files.

You can also **Edit This Report** – rename, amend the query parameters, etc

Use **Duplicate This Report** if you want to create a slightly different version of the same sort of report - e.g. for lists of members in different wards (OR you could download a list of all members and then sort or filter by ward in Excel).

You can set up **recurring reports** to refresh automatically every day, every week or monthly, and email you the download link.

Hide reports that are no longer needed to reduce clutter on your reports page. They can't be deleted, although they can be edited and renamed.

Data Protection

When downloading data from AN, it is very important to comply with GDPR:

- 1) Minimise the personally identifying data which is stored outside of Action Network, i.e. full names, email addresses, mobile numbers and mailing addresses. If information is not required for a legitimate purpose, it should not be stored outside Action Network. For example, do you really need to download members' mailing addresses, or would 'Ward' be enough geographical information for your purpose?
- 2) Data should always be stored securely, and the data controller (which every local party needs to have - registered with the Information Commissioner's Office with an annual fee) should always be aware of who has access to the data.
- 3) Data stored outside of Action Network should be deleted as soon as it is no longer required or after a reasonable period of time (e.g. once the data is out of date).
- 4) Any potential or suspected data protection issues, i.e. instances where the principles given above are not followed, should be reported to dataprotection@greenparty.org.uk as soon as possible.
- 5) You can easily add a password to encrypt a spreadsheet if you are emailing it to one of your team. This is advisable if it contains addresses and contact details, in case of email hacking or typing in the wrong recipient address. Send them the password via a different method (e.g. text / WhatsApp). In Excel go to File - Info - Protect Workbook - Encrypt with Password - and choose something memorable but not too obvious. GoogleSheets cannot be encrypted, although you can control who has access to them via the 'Share' function. However, membership data should NOT be stored on GoogleDrive or anywhere online outside of AN.

2) Emails

Start by setting up or editing a **customised layout** with your LP name, imprint and social media links: [using-customising-gpew-issued-email-layouts](#)

Sender and reply-to address: must be an official Green Party email address, not a personal one. Local or Regional Party chairs can request new email addresses for officers if needed.

<https://support.greenparty.org.uk/portal/en-gb/kb/articles/verifying-managing-your-action-network-reply-to-email-addresses>

Make the ‘Drag & Drop’ editor and ‘Query Mode’ your defaults so you don’t have to select these every time you start a new email:

<https://support.greenparty.org.uk/portal/en-gb/kb/articles/how-to-set-drag-drop-for-email-and-query-mode-for-reports-as-you-default>

The Drag & Drop editor (toggle the editor mode button at the top BEFORE you start adding content, if it’s not already your default) makes it easy to drag different blocks (e.g. images, text, buttons) into place, and then click on the block to edit it. Click on the crossed arrows symbol to move a block to a different position.

Learn how to write great emails - concise, clear, positive and attractively formatted. Use ‘clips’ for personalised targeting (Dear Emily, ...), big green buttons for sign up links, images/videos and emojis as well as text, etc.

‘Save & Refresh’ regularly (button at the bottom of the email editing screen) to avoid losing your latest edits if your computer crashes. If you are struggling to change something, ‘Save & Refresh’ first - might help, might not!

‘Save, preview & send’ takes you through the launch steps.

Always send tests of your drafts – e.g. emails and event sign-up confirmations - before you launch them! Send to different email addresses and preview on different devices if possible. Ask someone else to do a proof-read – it’s harder to spot your own mistakes.

Be especially careful to test all the links. Are they clickable and do they point directly to the correct URL (without any coding that refers to the source of a forwarded link)? When you see “?” in a URL, it’s best to delete that and everything that comes after it (called a ‘query string’, made up of value pairs, e.g. name=Craig, separated by &).

Check whether the **number of targeted recipients** sounds about right (more difficult during a membership surge!) - have you set up a correct query to target the right people (e.g. current members vs. all activists on your mailing list)? Have you targeted only people who have engaged with emails in the last XXX days to avoid spam issues?

3) Ladders to welcome new members

It’s very important to welcome new members quickly (automatically) and signpost them to how to get involved - especially during a big membership surge when we can’t realistically keep up with phoning everyone.

Read this first:

[creating-a-welcome-ladder-in-action-network](#)

and

[action-network-ladder-statuses-scheduling-explained](#)

And then follow the step-by-step guide in AN.

See your ladder(s) under **People** in the menu along the top. Check and edit them regularly to make sure all the information in them is still relevant.

4) Tags & updating who your LP Officers are

[generating-a-report-to-show-your-local-party-officers](#)

[how-to-add-a-new-local-or-regional-party-officer](#)

[how-to-remove-a-local-or-regional-party-officer](#)

5) Events

Events are a useful tool for signing people up for things like:

- An online meeting, so that only people who are signed up get sent the link (avoids the risk of 'zoom bombing' if the link is made public). If it's a zoom meeting, always give the Meeting ID and Passcode as well as the link, and the dial in (audio only) option makes your event accessible to people with visual impairments or no internet at home.
- An in-person meeting where you want to know who/how many people are intending to come - e.g. because of room capacity, catering numbers, dietary and accessibility needs, printing of handouts, etc
- An Action Day or other outdoor event where you want to be able to communicate quickly with everyone who has signed up in case of bad weather or a change of plan.

Ticketed events enable you to set ticket prices, limit numbers and collect payments.

Events can have a **discussion board** enabled or disabled. This can be a useful engagement tool, enabling any of the event participants to communicate with everyone else. Beware though - if your event has hundreds of sign ups this can generate a lot of emails (each post on the board triggers an email to everyone).

Events are automatically set up to send a **reminder email** with basic details the day before the event. It might not get sent until the afternoon for an all day event the next day. You can edit what it says, and also set up additional reminders if you like.

General tips

- When searching for an activist, usually best to do it via the **People menu** along the top. Click on 'activists' from the drop down box and type name or email address into the search box. There is another method but it often misses people.
- Some admins have experienced problems with sending emails using a query in AN when using Firefox or other Gecko-based **browsers**. A work-around is to create the email from within a report instead.
- It's fine to **duplicate an email** and edit the copy (including giving it a new name, subject line and content) to avoid having to format a new email from scratch. However, **duplicating events is best avoided** as details from the old event can get mixed up with the new event (e.g. in sharing posts and emails) causing confusion. Start each new event from scratch.