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Friends of the Earth

THE ACTION NETWORK

Creating a Form in Action Network

A **Form** is a useful way to gather supporters for your group and its work. You can use them to sign people up to your newsletters, or to host surveys. If you're looking for a way to capture people's information quickly and easily then a form could be the answer.

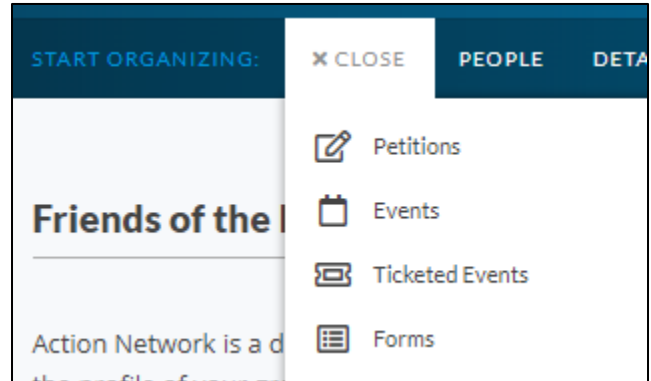When you're ready to create your form, you can follow this template:
https://actionnetwork.org/forms/tom-test-form

Contents

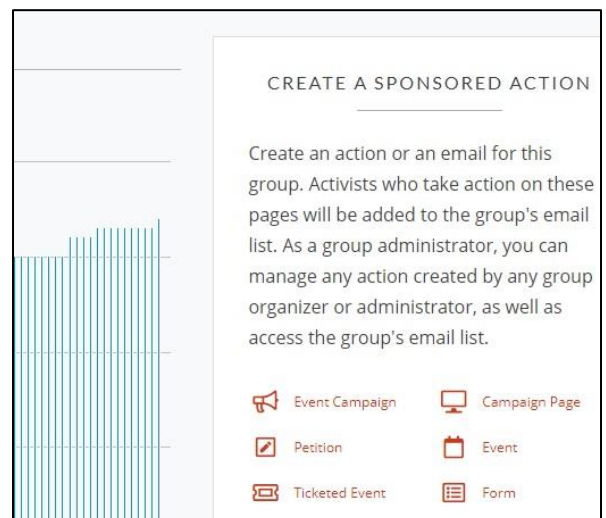Find me online at https://actionnetwork.org/groups/friendsoftheearth

Getting started

There are two ways to begin:

a) Choose **Forms** from the **Actions** menu.

b) From the **Create a sponsored** action menu on the right-hand side of your group's main hub page select **Form**

You'll then be taken to a screen where you can set up your form. You'll need to enter some details, from the top to the bottom.

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Adding content to your form

Titles and images

Administrative title – this isn't publicly visible by anyone else. You can use it so you can easily find your work within Action Network

Title of your form – this is the title people will see. Make sure it's clear and focused.

Add banner image (optional) – you can add a banner image for your form. Using an eye-catching relevant image will make it more likely to grab people's attention

- Pick something that is obviously relevant – that will draw them into reading more.
- Avoid using the same image for multiple things eg. a form and an event
- Follow the imaging size guidelines or the image will crop strangely.
- Follow this guide for how to change image sizes in Microsoft paint: http://condor.depaul.edu/gandrus/130/docs/Paint.htm
- If sizing up images is not your thing, an image is only optional, so you can skip it. Or ask for help on actionnetwork@foe.co.uk
- Make sure you have the rights to any image you use. **If you're not sure, don't use it.**

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Your call to action

Below the Banner field there's an editable text field for you to explain what your form is all about. Think about how you can engage people and persuade them to do whatever it is you're asking them sign up for. Try bolding some key words or phrases to help people scan the page and quickly understand what the form is about.

Add creator
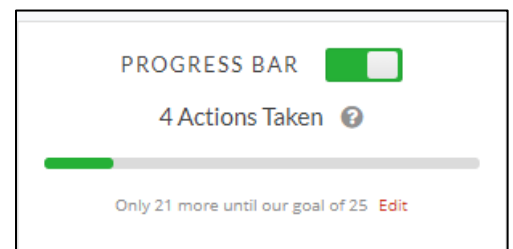
We recommend that you don't use this function.

Underneath the main text box on your form you'll see an option to add a Creator. This is a function adds you to the action as an individual.

Ignore this option but check that the sponsor is listed as your group e.g. Example Friends of the Earth.

Progress Bar

Head back to the top of the page. On the right-hand side you'll see the Progress Bar at the top – this shows visitors how many people have signed the form on the live version.

You can enable or disable this function at any time.

PROGRESS BAR

4 Actions Taken

Only 21 more until our goal of 25   Edit

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The form

You need to add a **Heading** for the form - this should describe what you're asking people to do eg. Sign the open letter to the Council, Sign up for emails today.
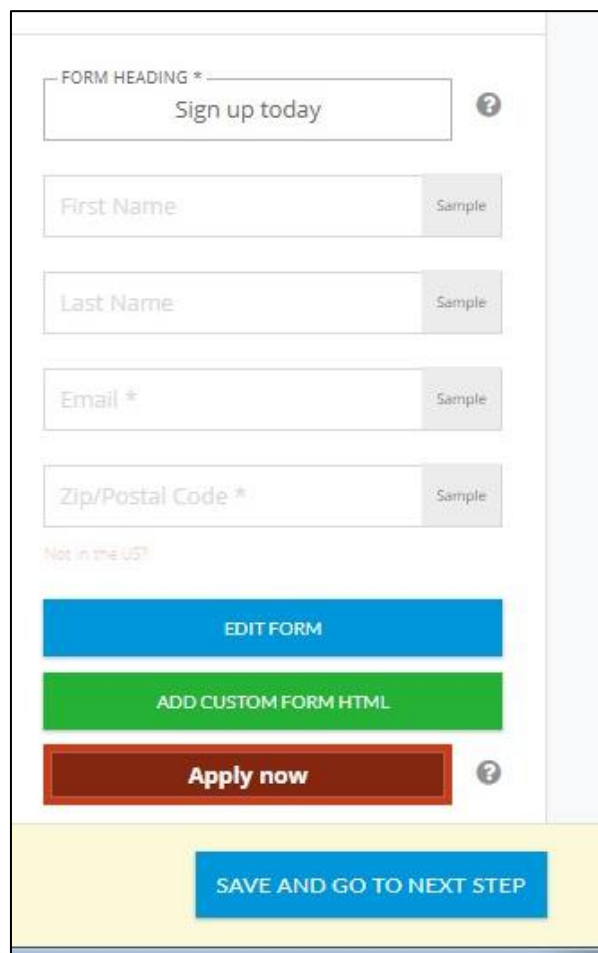
The standard forms asks people to add their:

- First name
- Last name
- Email
- Postcode

This video covers how to add custom fields to the form e.g. street address. Watch from 5.00 minutes in:
https://help.actionnetwork.org/hc/en-us/articles/203756859-VIDEO-TUTORIAL-Common-Action-Concepts

You can also change the wording on the red button people click on to sign the form. By default this says **Apply now**.

Click on the blue **Save and go to next step** button at the bottom.

You'll be taken to the **Form thank you** page – which is what people will see once they fill in your form.

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Form thank you page

Sharing options

You can turn off the sharing options if you want to, but they can help get more people adding their name, so we recommend leaving them on.

Adding content to the thank you page

There's a box for you to give people more information about your form, campaign or group. Why not use it to invite them to your next meeting or event? You can add links from this section, for example to your group's website.

When you've done this, you can click on the red **Save and publish** button at the bottom.

Your form is now live and people can sign it.

You'll be taken to the **Manage form** page. From here you can do a few things.

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The image below shows what a thank you page looks like to visitors, this version has the sharing options enabled.

Atlantic Friends of the Earth   powered by ○ Friends of the Earth

Thanks for your support.

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

SPONSORED BY: ATLANTIC FRIENDS OF THE EARTH

Thanks for signing up to get emails from us. We send our monthly bulletin on the first Monday of the month – so your first one will be in inbox then.

If you'd like to get involved with Example Friends of the Earth in other ways **check out our website**.

[choose a list/referrer code]   ▼

Share This Action   **Email A Friend**   **Embed This Action**

LIKE   TWEET   Subject: Take Action: Sign up to   <link
                         get emails from Example Friends of   href='https://actionnetwork.org/cs
DIRECT LINK   the Earth   s/style-embed-v3.css'
https://actionnetwork.org/forms/tom-test-form?
                                                               Options +

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Managing your form

Useful options

- **View form** – this will open up your live form in a new window

- **Edit form** – use this option if you need to make any changes to your work

- **Unpublish** – you can't delete your form but you can unpublish, so it's not publicly visible, if you need to. You can re-publish it at a later point too.

- **Create email** – use this to send everyone who's filled in your form an email. See the separate guide for more information on how to do this.

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- **Responses**– here you can edit the email people receive after filling in your form.

- **Auto-response email:** edit the email people receive after filling in your form or turn the function off. **Note**: the default info@email.actionnetwork.org address is an unmonitored inbox, so swap this for an address you have access to.
- **Thank you redirect link**: direct them somewhere else, rather than the default thank you page.
- **Unpublished redirect link** – direct people to a website of your choice when you close/unpublish your form.
- **Notifications:** get an email whenever someone fills in your form.

Extra options

Form answers options – Action Network allows you to look at the results of your form.

Unless you have written permission from Friends of the Earth **please DO NOT use the Form answers option function to download the data** as a csv. If you have questions about this please contact us on actionnetwork@foe.co.uk

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- **Edit URL** – you can edit the url of your form. See https://help.actionnetwork.org/hc/en-us/articles/115004543963-Editing-the-URL-of-an-action-or-group for more information on this.

- **Statistics** – this tab will show how your form is performing.

- **Form answers options** – use this function if you need to look at the results of your form. You need to be very careful with people's personal data, the file you'll download will include people's email addresses. Please be sure to delete this column before printing or saving anything.

- **Next steps** – some useful reading on how to get the best from your form.

- **Embedding your form** – if you need to embed your form in another website, and you're comfortable doing so, you'll see the code to do this on the right-hand side.

  Unfortunately, this code won't work on its own. Get in touch on actionnetwork@foe.co.uk and we'll explain why.