

Automating Volunteer Notifications in Action Network

A Step-by-Step Guide to Ladder Configuration



Built-In Notification Triggers

Understanding standard automatic responses and their functional limitations

Setup & Features

Automatic Responses

Triggers automatically when someone submits a form, signs a petition, or signs up for an event. You can configure notifications to go to one or several

Notifications

☒ Send an email notification when someone submits this form.

EMAIL ADDRESSES *

slowclimate@gmail.com 

Save Responses

System Drawbacks

Key Limitations

Global Notification Only

The system responds to the entire notification action globally, rather than filtering for specific user selections or pathways.

No Case-Specific Routing

It cannot target particular cases dynamically—such as sending a dedicated alert only when an activist specifically checks "Yes" to volunteering.



You can configure a Reply-To Address to get a more sophisticated answer.

Set up communication defaults within the Action Network settings.

Getting Started

Access Email Settings

Step 1: Ensure you are operating inside the default group system before proceeding.

Step 2: From your group dashboard, go to the top navigation bar and select "**Settings**".

Step 3: Click on "**Email Settings**" to define and verify your reply-to addresses.

Statistics Actions Emails Reports Activists Discussion Administrators Settings

General Action Settings Email Settings Mobile Settings Recurring Donations

Reply-Tos ?

+ Add New Email Address

ADD YOUR DESIRED REPLY-TO EMAIL ADDRESS HERE

sharon.kelley@nazcca.org

Verify Email

This group has no reply-to emails yet. Add one with the "Add New Email Address" button!



We can use ladders. What are ladders?



Automated Journeys

Ladders are not just what firefighters use—they are systematic pathways that automatically guide participants through customized engagement steps.



Action-Based Triggers

A user's specific action (like selecting "Yes" to volunteer) can immediately trigger tailored outcomes, such as sending emails or routing them to dynamic subgroups.



To get response to a particular custom field, create a new Ladder from the Start Organizing menu



Step 1: Navigate & Select

To begin building your workflow, navigate to the **"Start Organizing"** menu at the top of your Action Network dashboard. Select **"Ladders"** located under the Actions column.



Step 2: Initialize & Name

Next, click the **"Add New Ladder"** button to initialize your workflow. Give your ladder a highly descriptive internal name, such as **"Volunteer Sign-up Notification,"** to ensure your administrative workspace remains organized.

Ladders

Select a list to get started

[Choose One]



[Choose One]

Your Groups

- NAZCCA (Northern AZ Climate Change Alliance)
- NAZCCA Apache County
- NAZCCA Coconino County
- NAZCCA Kingman

Boost is live!

Edit Ladder

Current Group

LADDER TITLE *

New Volunteer

NOTES

+ Add New Rung

Define the Starting Point

Configure a "Took Action" trigger to automate your volunteer workflow



1. Configure the Trigger

Every ladder requires a trigger to activate the workflow for a specific user. Click **"Add Trigger"** at the top of your new ladder canvas and select **"Took Action"** from the available dropdown menu.



2. Select Your Form

Choose the specific petition, signup form, or event where you are actively collecting volunteer information.

Once configured, this ensures the automated sequence begins immediately upon a supporter's successful form submission.



Add Rung & Trigger

SELECT TRIGGER

Took Any Action

☐ INCLUDE UPLOAD ACTIONS

Save Rung And Trigger

Cancel

The screenshot displays the Action Network interface for configuring a flowchart. At the top, there is an "Entrance Point" button. Below it, a red box labeled "Took Any Action" is connected to a series of steps: "Action", "Decision", "Wait For Time", and "Randomizer". A red "+ ADD STEP" button is positioned between the "Took Any Action" box and the "Wait For Time" step. A red "+ Add Trigger" button is located to the right of the "Action" step. A green arrow points down from the "Wait For Time" step to a green circle with a plus sign. At the bottom, there is a yellow bar with a "Copy Steps" button and two buttons: "Save Draft" and "Save & Publish". Below the yellow bar, a green banner reads "Boost is live!" and "Action Network Boost — a new add-on package with advanced features, priority support, and expert deliverability advice — is now available to all Action Network partners." The Windows taskbar is visible at the bottom of the screen.

Route supporters using a Decision step

based on their custom volunteer field response

01

Add Step

Click the "+" icon directly below your trigger to add a new step, and select "Decision."

02

Evaluate Field

Configure the criteria to evaluate the specific custom field used to track volunteer interest on your form. Volunteer and Yes

03

Verify Condition

Set the condition to check if the field value "Equals" the word "Yes". This creates a logical branching path in your ladder, ensuring that only the subscribers who explicitly opted in to volunteer will proceed down the notification route, while others bypass it.



Press the + above to go to next decision. This is a decision of what action is taken, namely to Volunteer with a Yes

→ Entrance Point

+

Took Action: [Petition] Africa Peace and Climate Justice

?

✎

+

+ Add Trigger

Add Decision

?

TITLE

What does this decision do? *

?

QUERY

?

ANDOR

+ Add Rule

+ Add Group

⌵

[choose a filter]

⌵

× Delete

Save Decision

Cancel

Set up an automated email action on the "Yes" branch to notify staff immediately



Configure Email Action

On the **"Yes" branch** of your decision step, click the "+" icon, select "Action," and then choose "Send An Email."

- **Inbox Setup:** Configure the recipient address to point directly to your administrator or volunteer coordinator's inbox.



Insert Supporter Clips

Draft the notification message and utilize the **"Clips"** or **"Insert Field"** tool in the email editor.

- **Dynamic Fields:** Populate the body with the volunteer's submitted first name, phone number, and custom comments.
- **Immediate Follow-Up:** Equip your staff instantly with the details they need.



Edit Action



SELECT ACTION

Send An Email



CREATE EMAIL

ADMINISTRATIVE TITLE:

Volunteer Coordinator or Team Leader



WRAPPER:

Built In Email Wrapper



SUBJECT:

you have a volunteer to contact



FROM:

Rolf vom Dorp



REPLY TO:

jacksonkisangani@gmail.com [Edit](#)



Note you fill in this form.
subject, from, reply to...
The name is not an email but usually the contact person. The reply to must be pre selected and then the correct reply via “edit” selected.

Include Volunteer Details in Notifications

Use snippets to dynamically populate the coordinator's email

Recommended Snippets

Ensure your volunteer coordinator or team leader receives key details automatically:

- **Volunteer Identity:** Use `{{ LastName }}` and `{{ Email }}` to identify the supporter.
- **Location Details:** Provide `{{ City }}` and `{{ CountryAbbr }}` to assist with regional routing.
- **Clear Next Steps:** Instruct the coordinator to attempt an immediate face-to-face 1-on-1 contact (preferred) or a phone call.

Summary<.To notify an administrator in Action Network when someone signs a form and indicates interest in volunteering, you should use the **Ladders** tool. Unlike some other platforms that have a dedicated "Notification Settings" tab, Action Network uses these automated workflows to handle conditional actions based on form submissions.

Here is how to set this up to notify your team and include the data submitted by the new volunteer:

1. Create a New Ladder

- In the **Start Organizing** menu, navigate to **Ladders**.
- Click **Add New Ladder**. Give it a descriptive name (e.g., "Volunteer Notification Workflow").

2. Set the Trigger

- Every ladder needs a trigger. Click **Add Trigger** and select **Took Action**.
- Select the specific form where you are collecting the volunteer information. This ensures the ladder starts as soon as a supporter submits that form.

3. Add a Decision Step

- After the trigger, click the **+** icon to add a step and select **Decision**.
- In the decision criteria, set up a filter for your custom field:
 - Select **Custom Fields** or **Field Values**.
 - Choose the "Volunteer" field and set the condition to **Equals "Yes"** (or whatever specific value you used for "Yes").
- This creates a branch in your ladder. Only people who marked "Yes" will proceed down this path.

4. Configure the Email Action

- On the "Yes" branch, click the **+** icon and select **Action > Send An Email**.
- **Set the Recipient:** Enter the email address of the administrator or staff member who needs to contact the volunteer.
- **Draft the Email:** Write your notification email.
- **Include the Volunteer's Data:** Use **Clips** to automatically pull in the information the volunteer submitted. When drafting the email, look for the "Clips" or "Insert

Summary of the ladder usage

Manually enter contact information to trigger immediate automated notifications for coordinate follow-ups.

Notification Workflow: This configuration automatically alerts the team leader or volunteer coordinator immediately after signup. It streamlines recruitment and 1-on-1 setup via the Action Network (AN) system. Once connected, updated info is synced back to the original form.



Fridays for Future (FFF)

Use the local volunteer form to insert contact information quickly and manually.

actionnetwork.org/forms/volunteer-form-fff-local-v2/



NAZCCA Efforts

Submit volunteer details directly to register and join the core NAZCCA climate action efforts.

actionnetwork.org/forms/join-the-nazcca-efforts/

