

# Events and Forms

These are called 'actions' in Action Network jargon.

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# Intro to Events and Forms

Events and forms are called 'actions' on Action Network. They are a way of getting your email list to interact and respond to your activities and then you are able to report who is more active.

You can use **forms** to do surveys, ask questions or collect more data on interests or skills.

You can use **events** for both in-person events with a physical location or for online talks, meetings, training etc.

You can use standard XRUK questions in your forms/events and this data will be added to the information you have on the subscriber. You can also create your own questions, but these will just be held within the 'action' itself (this is more suited to temporary information e.g. to ask people what shifts they could cover when stewarding for an action with options of 12-2pm, 2-4pm, 4-6pm)

If you need help on this, please book time on our [Training Request Form](#), or [contact the Action Network Data Team](#).

# Useful fields and questions

*Very much a work in progress - page just started. All these questions are available throughout the UK network*

## GDPR consent

Please include on every from and to 'required'. Tags a subscriber with **GDPR\_Policy\_V2**

## Which Region

Drop down menu of options of every region and an 'other/nomad' category too.

## Principles and Values

This give a link to the P&Vs on the website and asked for use to tick if they agree with them. Then it tags them with **P&Vs\_agreed**

## Mattermost Handle

This is a free text field for someone to enter their mattermost handle.

. . .

(this page is a work in progress)

# Online events

This info will be focussed on events pointing to a 'non-registration' zoom link.

Using Action Network instead of sending people to register on zoom enables you to see who on your email list has registered. Also it then makes it easier to set up auto-reply emails, 24hr reminders and follow up emails.

## **This page covers how to:**

- Create an Event (written instructions below)
- Duplicate an existing Event - [watch this video](#)
- Set up an Event Campaign - coming soon
- Gather events together in an Event Campaign - [watch this video](#)

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## Create an Event

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### Add the key details

Title, start and end time, zoom link and timezone

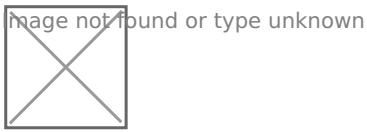
- title - keep it short and clear
- zoom link - this should NOT be a registration link (otherwise people will have to register here on the event and then again when they click the zoom)
- timezone - if your event date is within British Summer Time (then pick that time zone - see above) - otherwise choose Greenwich Mean Time.

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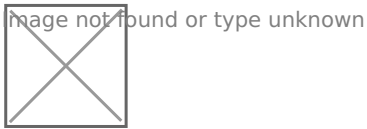


Add some short text about the event and upload graphic

Write something a little shorter than you might do on a Facebook event or other advert - because by the time they've reached this registration page - they should already know something about what they are signing up for.



Then the graphic



Update the form data entry details

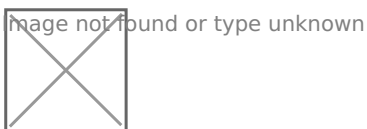


Check the button to 'Register' and then click 'edit'

Choose data fields

This part is hard to describe in words and images - so you need to just have a go. You can drag and drop any fields you don't want for your event (it's up to you). Just click on them and drag away from the left and let go.

In this example the surname and postcode have been removed and the GDPR field is being picked up and moved in to the form.



This should then be set to required.

Save your form and then in the bottom right of the screen click the button that says SAVE AND GO TO NEXT STEP.

Thank You page

To keep things simple - turn off the sharing options (you can investigate this later), and change the title.

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Also you can write a message here e.g.

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Click save and publish

You event is now live, some last things to do are

- add a nice page wrapper
- turn the discussion board
- set up auto-reply emails

The page wrapper gives your Event the 'XR Style' of font and colours and also this gets rid of all the Action Network branding at the top and bottom of the page. Swap from the default to the 'no logo' one. Also click on Discussion and toggle off.

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You can also click on 'RSVP' select your name and remove yourself from the list of attendees.

## AND finally set up the reply emails

Click on 'Responses'

As usual for an email - you might pick an appropriate wrapper (contact data team), set up your subject, from and reply-to email correctly.

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Then write the content of the email. Some of the default things on offer aren't very clear, so here is

an example of a clear email.

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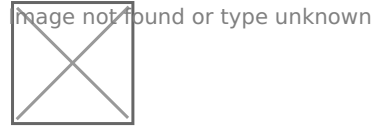
You can copy the same email or something slightly different for the 24hr before reminder email.

Click **SAVE RESPONSES**

View your event and use the URL to get sign ups!

# How to make a form

## Start with a basic template



Use this basic form below as the starting point for your form

## Question to add to forms

Only limited set of people now have the ability to create new custom fields/questions for forms. Contact the Action Network Data Team if you can't find the question you need.

GDPR (GDPR consent) : This should always be added to the bottom of every form and set to 'required'

