



Action Builder User Guide - Desktop

In order to log in, you will need to request an account at dfi.org/caucusplanning. This must be done by January 23. Go to DFL2022.actionbuilder.org to log in after your account is set up.

GETTING STARTED & LOGGING IN

1. You will receive an invitation in your email, click on the link provided to set up your account.

Alexis,

Amanda has invited you to organize at dfi2022test with ActionBuilder. Get started by clicking the link below.

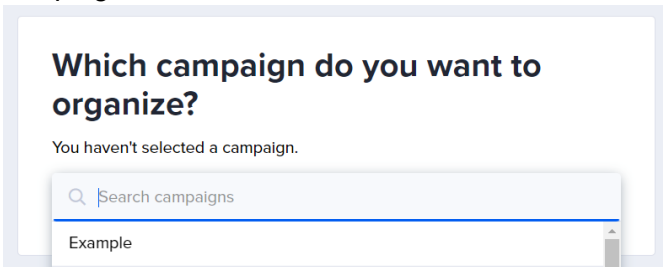
[Accept invitation](#)

This invitation will be valid for 5 days.

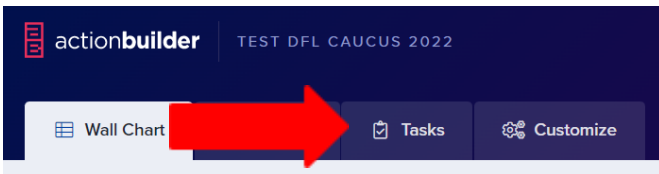
If you don't want to accept the invitation, please ignore this email. Your account won't be created until you access the link above and set your password.

-- The Action Builder Team

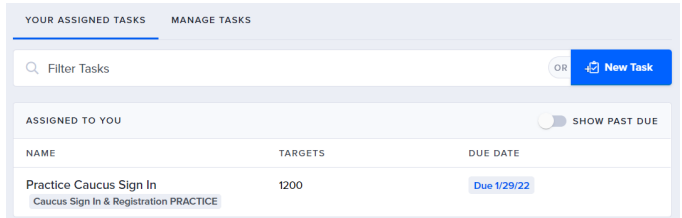
2. After setting up your account click on the campaign called **EXAMPLE**



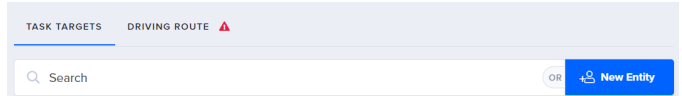
3. Select the tab labeled **TASKS**



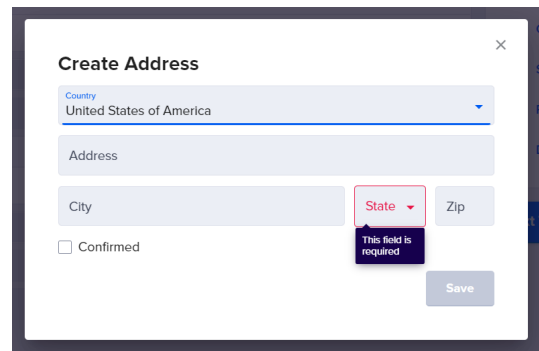
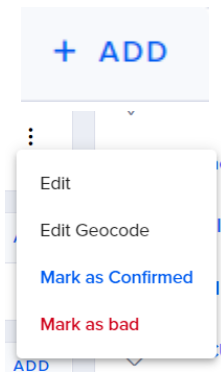
4. Select "Caucus Sign In Practice"



5. As folks arrive, type their name into the search bar

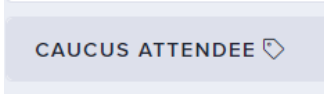


6. Click on their name. Click **ADD** to the right of each field to input new info. To confirm or update their info, click on the three vertical dots.

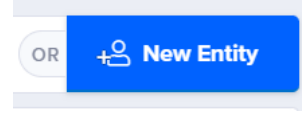




7. Confirm check-in status by selecting **ADD** in the Caucus Attendee section

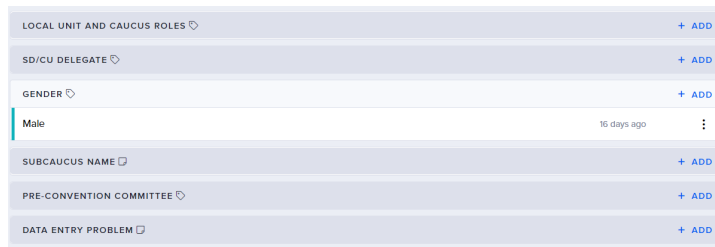


8. To add a new person, click on the blue icon, and enter their info. **Then repeat steps 1-7.**



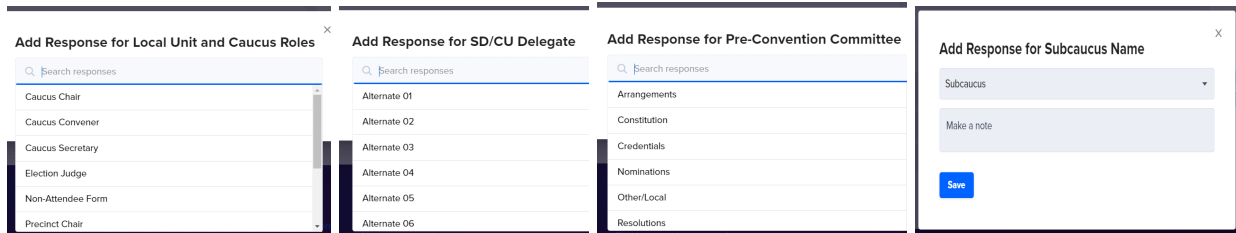
POST CAUCUS DATA ENTRY

While in the “task” section, click on the attendee's name and scroll down to **LOCAL UNIT AND CAUCUS ROLES** and **PRE-CONVENTION COMMITTEE** to enter data.



There are 4 sections to enter data:

- Local Unit and Caucus Roles
- Senate District and County Unit Delegates and Alternates
- Preconvention Committees
- Subcaucuses



Additionally, by selecting **Data Entry Problem**, you are able to send a note to the team.

