NationBuilder – Basics for Staffer/County Co-Chair

1. Contact your regional coordinator for access to the “County Co-Chair” permissions.

2. Go to www.txgreens.org. If you have questions about signing in, contact your regional coordinator.

3. You will see a list of choices on the right side of the screen. You may need to page down to see this. The choices might not be in the same order as shown here. Click on “Control Panel”. If it is not on your list, see step 1 above.

4. This screen defaults to “Goals”, which is not used at this time.
A - Function: Update people in the database for your county or region

A-1. If you choose “Activity”, next to “Goals”, all activity will display with the most recent on top. Try this to see the results. If you process just about every day, this might work for you.

A-2. An easier way to find people for your county or region that might need to be updated is to choose “People” and then run a filter. This will list only people, not all activity.
A-3. Choose the down arrow next to the filter.

A-4. Select “new supporters” from the filter list. Note that you can type the first letters and the system will present options for you.

The screen now shows only persons’ names with some other information, not all activity. Note that some entries list cities and some do not. Assume that you are a Denton County Co-Chair or a Staffer designated by one of the Co-Chairs. You are only interested in Denton County residents. Looking at the screen, you can see that John Test and some others do not show a city so you do not know what county they are in. Anthony Carollo lives in Burleson which is not in Denton County. You leave him for some other county to process. Sometimes, a person’s city in your county is displayed which makes the selection easier.
A-5. Select “John Test”. Click on the name.
A-6. John Test is displayed. Choose “Location” to show his address detail.
A-7. Note that John has a street address and a zip code but city, county and state are blank. Remember that this is just an example. Often, the person who signs up also fills in his city and state.
A-8. You, as Denton County Co-Chair, know that 76201 is a zip code in the city of Denton so you fill in the city, county and state. Be sure to “Save Address” when you are done. If the zip code indicates that this person is not in your county, go back to step A-1 or A-2 and select a different person.
A-9. After address is saved, select “+Path” near the top.
A-10. A pop-up screen with several options appears. You only are concerned with the top item: “Path”.
A-11. You only are concerned with the top item: “Path”. Click the pull-down menu (▼). Show “Categorize New People”. Click “Submit”
A-12. The path will appear near the top of the page. The purpose of the path is to list actions to be taken by you to update the person’s record. Clicking on an item on the path indicates that you have completed that action.

A-13. John Test had filled in an e-mail address and a phone number as well as a street address and zip code. You completed his location information so the next step is adding the county and region tags. If you had needed to find more location information or email/phone information, you could have noted somewhere to take the appropriate action later. You could continue with the tags.
A-14. To add the tags, select the “Add tags” box near the top of the screen.

A-15. Key in the tag for county followed by “comma space” region. The convention is to use lower case. Press “Add tags”.

A-16. The tags are displayed after the “Add tags” box. The next task on the path is to add the person to the county list.
A-17. Go to the “Actions ▼” pull-down menu in the upper right corner of the screen. Select “Add to or remove from lists”.

Important: If you encounter problems trying to add to a county list, contact your regional coordinator because the permissions are not set correctly for the list. Examples of problems include “county list is not found” or you receive an error message like this:
A-18. Type the county list name. The convention is lower case with an underscore between the county name and the word “county”, e.g. “denton_county”. Click on the appropriate county list.

A-19. A checkmark (✓) appears when the person is added to the county list.

A-20. The next task on the path is to add the person to the region list. The process is like adding to the county list. The convention for the list name is “region” underscore number, e.g. “region_5”.
A-21. The next task on the path is to update the point person. This is usually a Co-chair. Select “Edit”.

![Image of a user profile with options for categorizing new people and editing a point person]
A-22. New options are displayed. Go to the pull-down menu for “Point Person”

23-A. Select a point person from the drop-down menu.
24-A. The record for this person is complete. The next step is to update the path status using the pull-down box on the path.
25-A. For John Test, you have completed the path. That is not necessarily true for other people. Refer to step A-13 for reasons why you may choose to not close the path at this time.
26-A. If you choose “Complete Path”, click on submit.