

VoteBuilder 101 User Guide

For further training on the tools covered in this guide, check out the suite of [VoteBuilder courses](#) available in our Online Academy.

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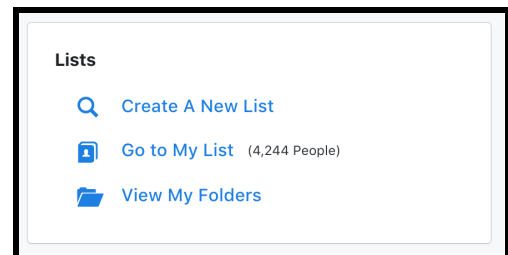
New to VoteBuilder? Be sure to reference the [VoteBuilder Glossary](#) at the end of this document for definitions of the terms that are used

Creating Lists in VoteBuilder

Throughout the course of your campaign, you will create many lists of voters. Lists to help you plan your targeting strategy. Lists of voters to canvass, to call, to send mail to, and more. In the Lists section of the Main menu, you can: create a new list, return to your most recent list ("Go to My List"), or find a list that has been saved in a folder. This job aid will guide you through creating a new list.

1. Create a New List

Select Create A New List, which is found on the Main Menu and the Sidebar Menu.



2. Select Your First Search Criteria

Click on a filter to expand the search criteria and select or enter the criteria for the voters you want to include on your list. You can use practically any information from voters' records as potential search criteria. Some common options include:

- **Canvass Status** - The results of your voter contact attempts, per the data you've entered into VoteBuilder. For example, you might build a list of only voters who were not home when you previously attempted to contact them.
- **District** - The media market, county, congressional district, state house district, etc. in which the voter is registered to vote (found in the Home Districts section).
- **Likely Party** - In states where voters do not register with a political party, this is a guess of the voter's party affiliation based on data that we've been able to collect about them over time, including things like voting history, canvass responses, etc.
- **Party** - In states where voters affiliate with a political party on their voter registration application, you can search by that.

- **Race/Ethnicity** - This field searches the race/ethnicity reported in the Vital Stats section of an individual voter's record, which may be inferred from other sources and may not be based on the voter's self-identification.
- **Registration Date** - The date the voter registered to vote.
- **Scores** - Estimates of the voter's probability to do something (e.g., vote) or support a party or issue (e.g., Democratic Party Support).
- **Survey Questions** - Voters' responses to campaign-populated Survey Questions (e.g., Are you going to support Candidate X in the November election?).
- **Voting History** - Indicates which elections voters have (or have not) participated in.

For a detailed breakdown of all available VoteBuilder filters, check out [this resource](#) from our friends over at Stac Labs.

3. Preview Your List

As you enter selections for your search, they will appear in the summary on the right-hand side of the screen. At any time, you can calculate how many voters exist in the existing search by selecting the Preview My Results button.

To display the number of doors, mailboxes, and phone numbers in the list, select the Plus Sign next to the number of voters. (In the image to the right, that section is expanded, so the Plus Sign appears as a Minus Sign here.)

Step 5: Narrow People

Early Voting
exclude [Voted Early](#)

Districts
[Precinct = Precinct 01](#)
and [County = De Soto](#)

Registration
[Registration Status = Active or Inactive or Provisional](#)

Suppressions
include [Deceased](#)
and include [Good or Bad Voting Address](#)
and include [Good or Bad Mailing Address](#)
and [Find out how big your List will be before you run it](#) and include [Do Not](#) you run it [..less](#)

[Preview My Results](#)

453 People
394 Phones
385 Doors
390 Mailboxes

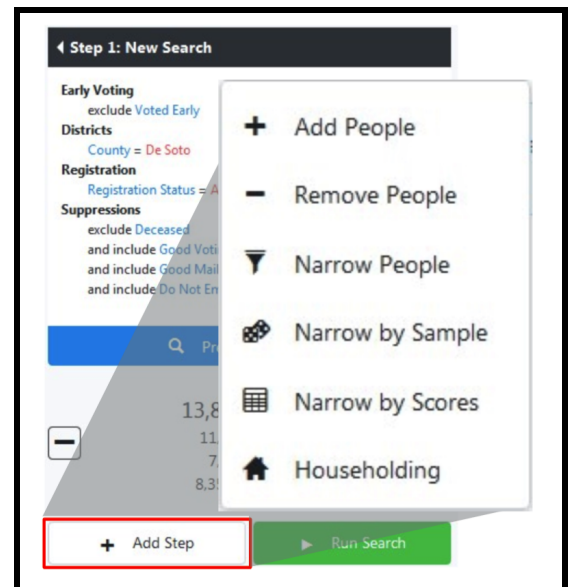
[+ Add Step](#) [▶ Run Search](#)

4. Add a Step

To add a second set of criteria to your search, typically you will want to add a new step to your search. Select the Add Step button underneath the number of voters.

The three primary types of steps are:

- **Add People** - People who fit this criteria are added to the list, regardless of whether they also fit the criteria from the prior step. In other words, include people who fit the prior criteria or the new criteria.
- **Remove People** - People who fit this criteria are taken off of the list. For example, if you check precinct 1, anyone who lives in precinct 1 would be removed and the resulting list would only include voters living in precincts 2, 3, 4, etc.
- **Narrow People** - People who fit the criteria will be left on the list. In other words, people who fit the prior criteria and the new criteria.



Keep adding steps until you have built the search you want.

Tip: The only time multiple criteria should be selected in a single step is when you want to use an AND operator between those criteria. For instance, you want to include all voters who have a turnout score between 70 & 100 AND who also have a support score of between 31 & 69. When in doubt, it's usually better to use multiple steps.

5. Before You Finish...

We recommend running a couple checks before you run your search:

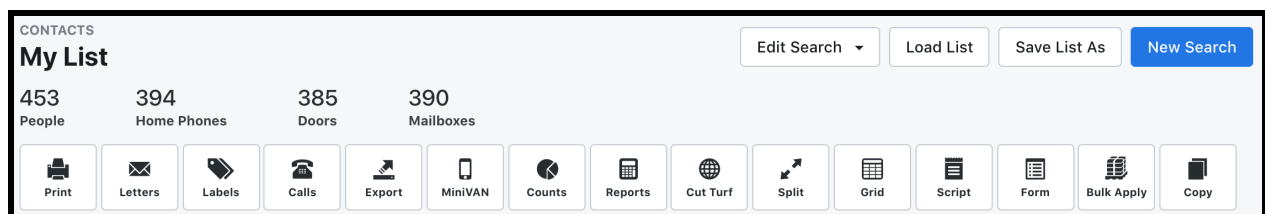
- **Suppressions.** What [suppressions](#) are in each of your steps? Generally, we recommend that you go to the Suppressions section and select Remove All Suppressions unless you are confident in all the data fields mentioned in those suppressions.
- **Add Geographic Parameters as Your Last Step.** Do you have geographic limitations included in your search? Should they apply to the entire search (rather than just one step)? If so, be sure they are added as the last step of your search.

6. Run the Search

When you're ready, select the green Run Search button to process your search and generate your results.

7. View & Use Your List

The **My List** page displays a summary of the voters and contact options for your list. The icons at the top of the screen allow you to select the most common actions that you may use your list for: Mailing, Phone Banking, Canvassing, and Entering Data. To see details about what each icon does, hover your cursor over it.



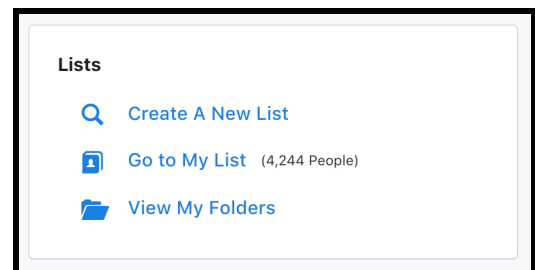
Organizing Your Folders & Naming Lists in VoteBuilder

As you create lists and turfs over the course of your campaign, it's important to keep them organized. By creating folders that contain specific kinds of lists, or lists that you intend to share with specific people, you can make it easier to find those lists later in your campaign. This resource will guide you through creating and sharing folders in VoteBuilder, and provide suggestions to help you establish folder- and list-naming conventions for your team.

Creating & Sharing Folders in VoteBuilder

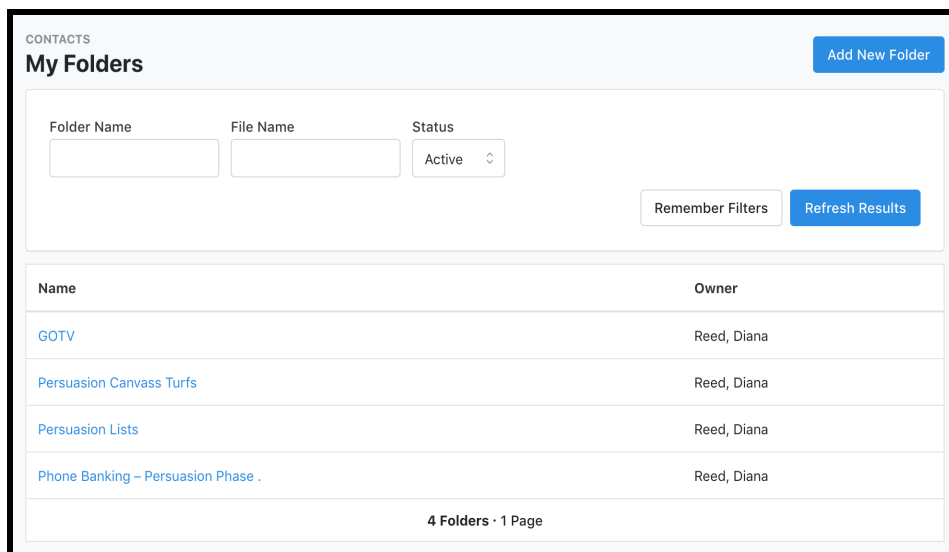
1. View My Folders

Select View My Folders, which is found on the Main Menu, or My Folders from the Sidebar Menu.



2. Add New Folder

Select the blue Add New Folder button in the upper right-hand corner.



3. Name the Folder

Choose a name that makes clear what kind of lists will be saved in the folder. As a general rule, the name should be as clear to anyone you share the folder with as it is to you. The description is optional, but can provide additional clarity about the purpose of the folder when you share it. Once you're ready, select the blue Save button.

FOLDERS
New Folder

Name*

☐ Allow other users to save into this folder

Description

Status ☒ Active ☐ Inactive

[Save](#)

4. Sharing a Folder

Once you've saved the folder, you can share it with individual users in your committee. Simply select their name from the list on the right, and then click add (see left).

TIP: You can add new users to a folder at any time by opening the folder and selecting the blue Edit Folder button in the upper right-hand corner (see below).

FOLDERS
Edit Folder Daytime Walk Lists

Name*

☐ Allow other users to save into this folder

Description

Created By Studebaker, Joel (9/28/18)

Status ☒ Active ☐ Inactive

[Delete](#) [Save](#)

User Access

Committee

Users with Access

Users **without** Access

- Butterfield, Sarah
- Chambers, Trey
- Clouston, Rose
- Dietrich, Kelly
- Ellis, Katie
- Reed, Diana
- Siebert, Luke
- Strauss, Roy
- Sweeney, Patrick

[Remove](#) [Add](#)

FOLDER
Persuasion Lists [Edit Folder](#)

File Name Type Owner Date From Date To

☐ My Followed Lists & Searches Only

[Remember Filters](#) [Refresh Results](#)

Follow	ID	Type	Name	Description	People	Owner	Date Created	View Map	Print Region	Edit
+ Follow	506824	Search	2018.08.22_Diana_FullPersuasionList		Reed, D.	Reed, D.	8/21/18			Edit
+ Follow	506846	Search	Precinct 1 .		Reed, D.	Reed, D.	9/14/18			Edit
+ Follow	506851	Search	Precinct 2		Reed, D.	Reed, D.	9/18/18			Edit
+ Follow	506852	Search	Precinct 3		Reed, D.	Reed, D.	9/18/18			Edit
+ Follow	506853	Search	Precinct 5		Reed, D.	Reed, D.	9/18/18			Edit
+ Follow	506854	Search	Precinct 6		Reed, D.	Reed, D.	9/18/18			Edit
+ Follow	506855	Search	Precinct 7		Reed, D.	Reed, D.	9/18/18			Edit

7 Items - 1 Page

Recommended Naming Protocols

General Rules

- Every folder and list name should be clear to anyone involved in the campaign without having to ask!
- If you use abbreviations, agree on them with other members of the team ahead of time!

Similar Folders & Lists

You can't nest folders — meaning you can't put a folder inside of another folder. So use key words at the beginning of names of similar folders and lists to keep them grouped together.

For example, you might have a "Persuasion - Walk Lists" folder and a "Persuasion - Call Lists" folder.

Important Folders & Lists

Use an asterisk (*) or an exclamation mark (!) at the beginning of important lists and folders you will reference often. This will keep them at the top of the list.

Old Folders & Lists

You can rename old folders and lists that you do not reference often with "zzz" at the beginning to push them to the bottom of your list. You can also make old folders Inactive in the Edit Folder menu.

Use Filters

At the top of My Folders you can filter by the name of the folder, the name of files inside of folders, and by whether folders are marked Active or Inactive.

Entering Data in VoteBuilder's Grid View

Grid View is the most common way to enter canvassing and phone banking data back into VoteBuilder because it displays all the records from the packet together, and in the order they appear in the packet. In this resource, we'll guide you through the most efficient and accurate ways to use Grid View for data entry.

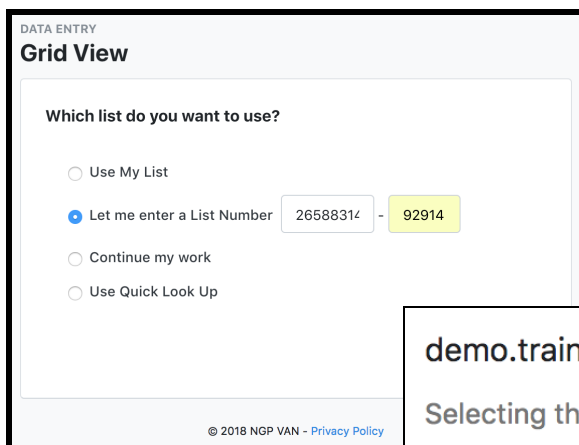
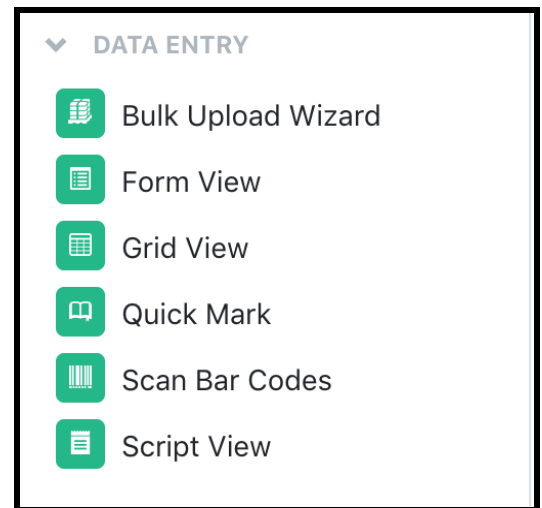
1. Choose Grid View

Select Grid View, which is found on the Main Menu and the Sidebar Menu.

2. Choose a List

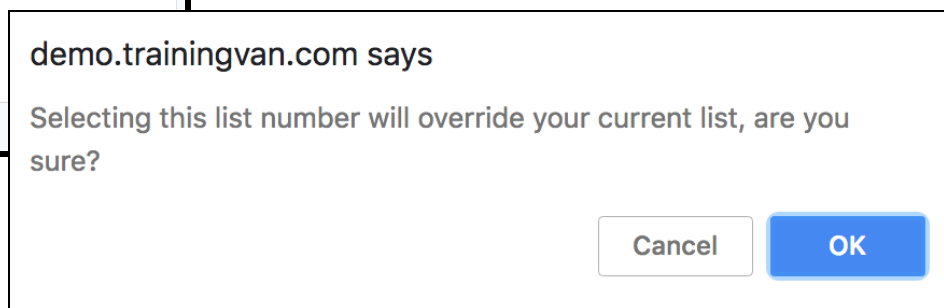
We recommend using the list number found on the bottom of printed lists. If you've started entering data, you may have the option to pick up where you left off with the "Continue my work" option.

NOTE: You can only enter data using a list number within 30 days of generating the list.



3. Override Current List

Loading a list in Grid View will override "My List." If you need to save your active list, hit "cancel" and save your list first!



4. Select Script & Sort Order

Select the script and sort order you used when you generated the list. If the script and sort order do not match exactly, you will not be able to enter the correct data in the correct order! You will also need to indicate who canvassed this list and on what date.

Some campaigns choose to enter notes from canvassers in the Notes field. However, any data that can be entered directly into a voter's profile — like an email address, phone number, or language preference — should be entered directly into the profile and not as a note!

TIP: After entering canvass results and survey responses using Grid View, use Quick Look Up to find and update user profiles with new information like email addresses and language preferences.

[Home](#) / [Grid View](#)
[Help Wiki](#)

DATA ENTRY

Grid View

Script*

Canvasser*

Date Canvassed*

Contacted How*

Clear Sort Order

Sort Order1 ☒ Asc ☐ Desc

Sort Order2 ☒ Asc ☐ Desc

Sort Order3 ☒ Asc ☐ Desc

Sort Order4 ☒ Asc ☐ Desc

Sort Order5 ☒ Asc ☐ Desc

Sort Order6 ☒ Asc ☐ Desc

Sort Order7 ☐ Asc ☐ Desc

☒ Include Notes

Next

5. Zoom Out!

The Grid View screen is likely to be wider than your monitor. Close the sidebar (using the hamburger icon) and use your browser's zoom out function to see more at once!

VAN Demo

Home / Grid View

DATA ENTRY

Grid View

Records: 1 - 20 of 50 Go

Voter File VANID: Go

Contacted By: Studebaker, Joel Date: 9/29/18 How: Walk

Voter File VANID	Name	Address	City	Party	Age	Phone	Result
420609	Smith, Rich A	11567 SW Ben Dr	Lake Suzy	R	48	(555) 410-7703	
722724	Lane, Lauren D	11567 SW Ben Dr	Lake Suzy	R	33	(555) 303-0894	
334264	Morse, Christopher R	11597 SW Ben Dr	Lake Suzy	R	58	(555) 590-8302	
449629	Russell, Paula D	11611 SW Ben Dr	Lake Suzy	R	59	(555) 654-4608	
473664	Shafer, Kathleen P	11552 SW Courtly Manor Dr	Lake Suzy	D	59	(555) 784-9580	
193181	Dunham, David A	11600 SW Courtly Manor Dr	Lake Suzy	D	49	(555) 840-7891	

DATA ENTRY

Grid View

Records: 1 - 20 of 50 Go

Voter File VANID: Go

Contacted By: Studebaker, Joel Date: 9/29/18 How: Walk

Voter File VANID	Name	Address	City	Party	Age	Phone	Result	Canvasser	Notes	Survey Q.	Sample Activist Code
420609	Smith, Rich A	11567 SW Ben Dr	Lake Suzy	R	48	(555) 410-7703		Last Name, First Name			
722724	Lane, Lauren D	11567 SW Ben Dr	Lake Suzy	R	33	(555) 303-0894		Last Name, First Name			
334264	Morse, Christopher R	11597 SW Ben Dr	Lake Suzy	R	58	(555) 590-8302		Last Name, First Name			
449629	Russell, Paula D	11611 SW Ben Dr	Lake Suzy	R	59	(555) 654-4608		Last Name, First Name			
473664	Shafer, Kathleen P	11552 SW Courtly Manor Dr	Lake Suzy	D	59	(555) 784-9580		Last Name, First Name			
193181	Dunham, David A	11600 SW Courtly Manor Dr	Lake Suzy	D	49	(555) 840-7891		Last Name, First Name			

6. Input Data

The fields available in the grid should match up to the list you are entering, though they may not appear in exactly the same order. Make sure the data on your sheets matches what you enter in Grid View -- and that you're entering data for the right voter!

TIP: Some elements may look odd, but zooming out helps you see more of each row at one time!

Voter File VANID	Name	Address	City	Party	Age	Phone	Result	Canvasser	Notes	Survey Q.	Sample Activist Code
420609	Smith, Rich A	11567 SW Ben Dr	Lake Suzy	R	48	(555) 410-7703	Refused	Studebaker, Joel		Option 1 Option 2 Option 3 Option 4 Option 5	
722724	Lane, Lauren D	11567 SW Ben Dr	Lake Suzy	R	33	(555) 303-0894		Studebaker, Joel			
334264	Morse, Christopher R	11597 SW Ben Dr	Lake Suzy	R	58	(555) 590-8302		Last Name, First Name			

De Soto - Precinct 01 - SW Ben Dr - Odd						
420609 Rich Smith M 48 11567 SW Ben Dr Lake Suzy, FL 34269 (555) 410-7703	Gen: 3/3 Primary: 0/3	Canvass Result ☐ Not Home ☒ Refused ☐ Moved ☐ Vacant ☐ Inaccessible	Survey Question ☐ Option 1 ☐ Option 2 ☐ Option 3 ☐ Option 4 ☐ Option 5	Activist Code? ☐ Yes	Notes	
722724 Lauren Lane F 33 11567 SW Ben Dr Lake Suzy, FL 34269 (555) 303-0894	Gen: 0/3 Primary: 0/3	Canvass Result ☐ Not Home ☐ Refused ☒ Moved ☐ Vacant ☐ Inaccessible	Survey Question ☐ Option 1 ☐ Option 2 ☒ Option 3 ☐ Option 4 ☐ Option 5	Activist Code? ☐ Yes	Notes	

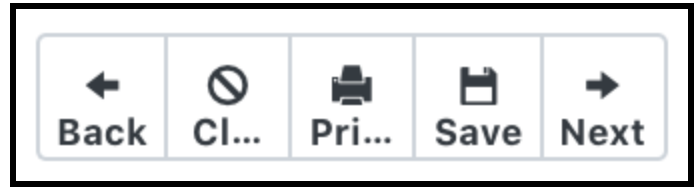
7. Mark Remaining Not Home

As you enter data, you do not need to enter anything for people who were not home. At the end of each page, you can use the "Mark Remaining Not Home" button to mark all blank rows "Not Home" with a single click. As you go, double check your work to make sure you haven't skipped any rows!

Mark Remaining Not Home

8. Save and Next

When you are ready to go to the next page, use the “Next” button. Clicking the “Next” button will save all of your progress before going to the next page, but you can always click the “Save” button to make sure your work is saved before moving on or stepping away from your computer.



9. Other Options

To jump forward a number of pages, you can use the drop-down under Records to skip ahead. If you are starting in the middle of a packet, you can use the Voter File VANID of any person on the list to skip to where they appear on the list.

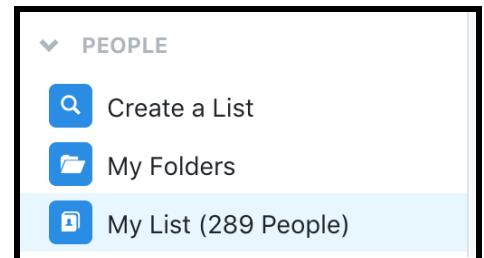
Records		Voter File VANID	
1 - 20	of 50		
Go		Go	
Contacted By		Date	How
Studebaker, Joel		9/29/18	Walk

Printing Lists for Phone Banks

When you are ready to print a list for a phone bank, it is important to select the right options. This will improve the experience of your volunteers and make data entry easier once you've completed contacting the voters on your list. In this resource, we will guide you through printing a list for a phone bank.

1. Open Your List

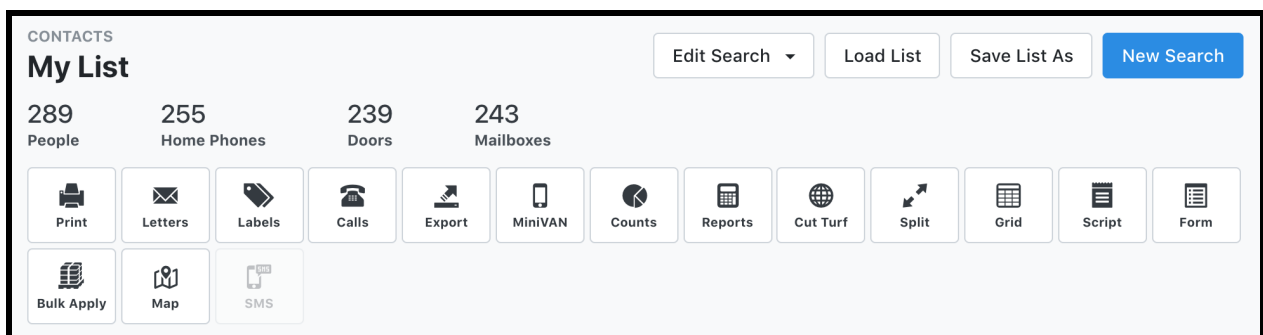
If you want to print your most recent list, simply select My List from the sidebar menu, or Go To My List from the Main Menu. You can also open another list you've saved by selecting the My Folders option.



2. Select Print

Verify that the number of phones is appropriate for the phone bank you have planned, and then select the Print button.

TIP: Typically Print is the first button in your row of options, but you can also drag the buttons to reorder them!



3. Select the Report Format & Script

You should select an appropriate Report Format and Script for the conversations your volunteers will be having. You can preview the report format to make sure it includes the correct information.

DATA ENTRY
Print

Report Format* Diana Call Format [Preview](#)

Report Format for phone calls

Script Persuasion Canvass Script

Contacted How* Phone

Title Use a Descriptive Title

MiniVAN Campaign

Contacted How* Phone

Title Use a Descriptive Title

MiniVAN Campaign

Clear Sort Order

Sort Order1 Name Asc Desc Show Group Header Page Breaks

Sort Order2 Phone Number Asc Desc Show Group Header Page Breaks

Sort Order3 Asc Desc Show Group Header Page Breaks

Sort Order4 Asc Desc Show Group Header Page Breaks

Sort Order5 Asc Desc Show Group Header Page Breaks

Sort Order6 Asc Desc Show Group Header Page Breaks

Sort Order7 Asc Desc Show Group Header Page Breaks

4. Select a Contact Method

Select Phone as your contact method. This will populate the sort order with Name and Phone Number as shown on the left.

TIP: It is crucial that the sort order used when printing the list is replicated precisely when setting yourself up for data entry! If you choose to customize the sort order, note the fields and order on a "Cheat Sheet" for yourself and your team!

5. Choose a Title

Give your list a descriptive title using the naming conventions your team has agreed on.

6. Final Options

In most cases, the default options at the bottom of this page should be sufficient for your needs. Click Next!

☒ Print People

☐ Print Last Name Range
 ☐ Print Address Range
 ☒ Do Not Print Range

☐ Print Map
 ☒ Print Footer (List Number, Page Number, and Date Generated)
 ☐ Print Two Copies of Cover Sheet
 ☐ Exclude Anyone Who Has Early or Absentee Voted
 ☐ Format for Clipboard

Cancel
 Next

7. Go to “My PDF Files”

Your PDF is now being created! It may be ready immediately or take a few minutes depending on the size of your list. You can click on “My PDF Files” on this page (see right-top) or on the Main Menu (see right-bottom) to find the PDF of your list.

PDF File

Your PDF is being created.

If you have a large list, the PDF creation process may take a few minutes to complete. To check on your file(s) at any time, go to the [Main Menu](#) and look for a link that says [My PDF Files](#).

[Or go back to My List.](#)

MAIN MENU

Welcome Joel

[View My Voter Contact Landing Page](#)

My Requests	0
My Export Files	0
My PDF Files	1
Counts/Crosstabs Outputs	0
Support Requests	0
Contact the Admin	
Request a User Account	
NGP VAN Help and Training Guides	

8. Select “Download File”

On the PDF Print Jobs page, you can select “Download File” to download the PDF. It may open in your browser or prompt you to save it to your desktop. From there, you should be able to print normally.

DATA EXPORTS

PDF Print Jobs

Remember Filters
 Clear
 Refresh

[PDF Printing Instructions](#)
Download Selected Files

☐	Title	Type	Created	Created By	File Size	Download Link	Delete
☐	Use a Descriptive Title	List	9/28/18 6:40 PM	Studebaker, Joel	72 KB	Download File	Delete

1 PDF Print Job · 1 Page

Preparing Walk Packets with VoteBuilder

VoteBuilder can generate many of the components of the walk packet you print out for a canvass: the **list of voters** whose doors they should knock on, **a map** of the turf, and the **script** the canvasser should use to guide their conversations. This Resource will guide you through the steps to generate those materials for your canvass.

Before You Start...

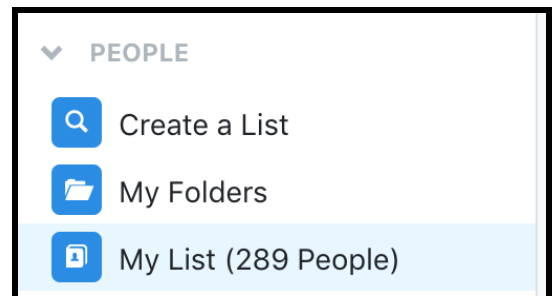
It'll help to have a few decisions made, including:

- How long the canvassing shifts are that you're cutting turf for, and how many houses per hour your campaign is estimating a canvasser can reach
- Which [Script](#) you should associate with these walk lists
- Which [Report Format](#) you want to use with these walk lists

Cut Turf

1. Open Your List

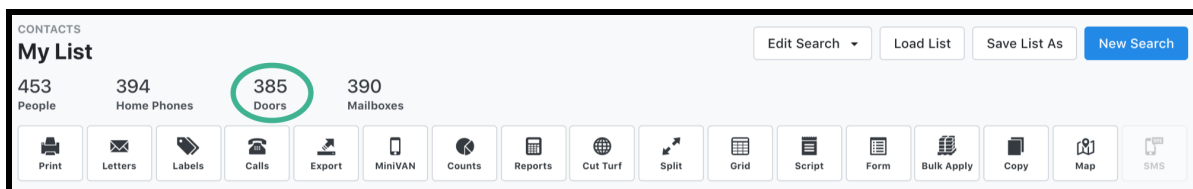
If you want to print your most recent list, simply select My List from the sidebar menu, or go to My List from the Main Menu. You can also open another list you've saved in a folder.



2. Narrow Your List, if Need Be

If you want to create walk packets for only one precinct at a time (recommended), or add other filters to narrow your list, select Edit Search in the top menu bar, and add those criteria to your list. For help with this, view the "Creating Lists in VoteBuilder" Resource.

Before you move on, make sure your list does not contain more than 2,500 doors. If it does, you will not be able to take the next step and cut turf



3. Select Cut Turf

In the row of icons, select Cut Turf.

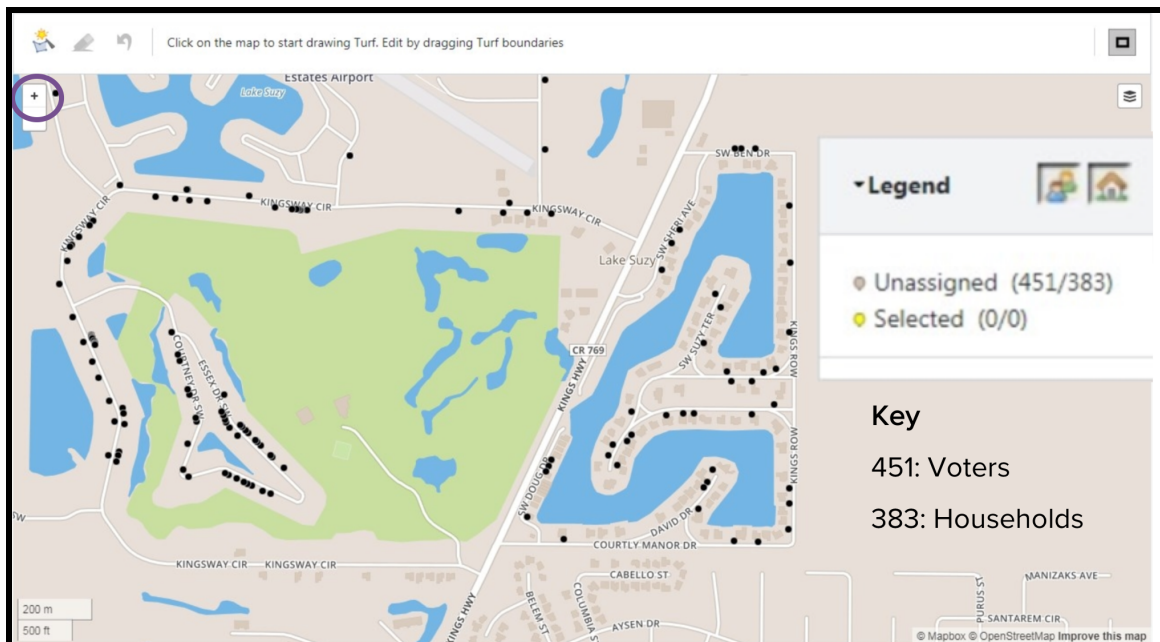


4. Zoom In to Start

You're aiming to divide up the list and group together houses one canvasser can reach in one shift. A good starting point for an urban or suburban area is 20 houses per hour.

You'll draw lines around the group of houses (dots) that should be included in a single turf.

Use the + sign in the top left of your screen to zoom in on the area where you'll start.



5. Draw Your First Turf

Identify a group of houses that appear like they would work as one turf.

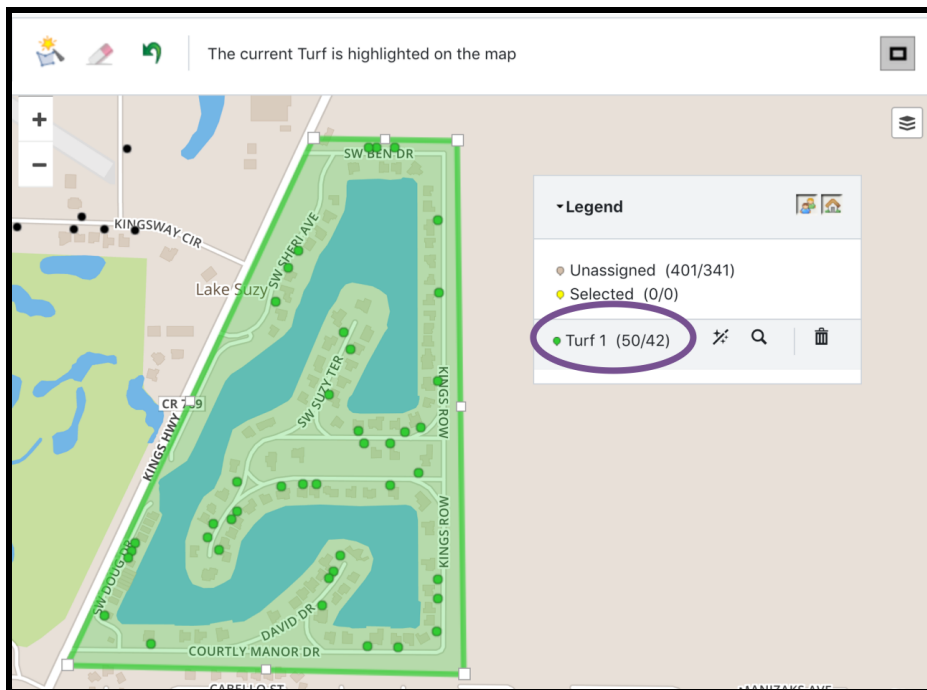
Click a point on the map to start drawing your first turf boundary. A white box should appear over that point.

Click another point on the map, and a line will connect the two points you've clicked. Continue clicking points on the map and drawing lines until the entire area you want as one turf is outlined, and all the houses you want included are encompassed in the highlighted area. Then, click the white box of your original starting point to finish setting the boundaries of this turf.

TIP: You may notice the Auto-Cut function. We do not recommend using this.

6. Review Your Turf

Review the legend to see how many houses are included in the turf you just drew. If it's around the number you were aiming for, great job! You're ready to move onto step 9. If it's too many or too few, continue to step 8 and edit your turf.



7. Edit Your Turf

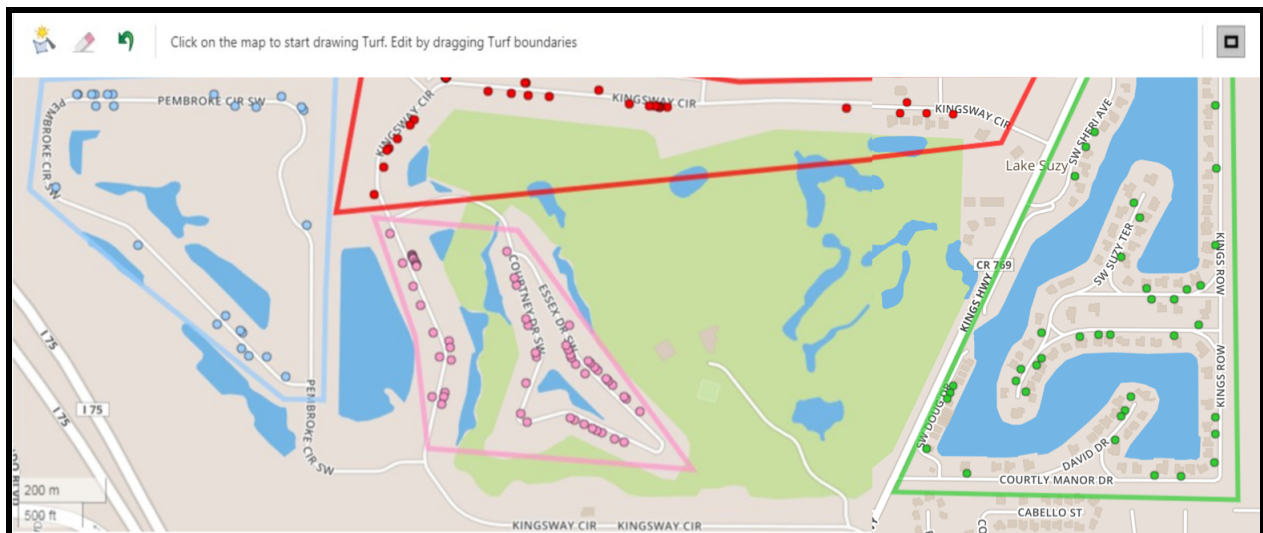
Select one of the white boxes on your turf boundary, and drag it to where you want to move it. Continue expanding or contracting the boundaries of your turf by dragging the white boxes until you have the desired number of households in your turf. (If you're having trouble with this, make sure you're holding down your mouse button.)

8. Finish Cutting Turf for Your List

Repeat steps 6-8 until all the houses in your list are assigned to a turf.

However, if there are a couple houses that are too difficult for canvassers to reach, it's usually ok if those ones don't make it into any of your turfs.

When you're satisfied with your turfs, select the blue Save & Finish button in the top right-hand corner of your screen.



9. Save Your Map Region

Select the folder your team is saving these turfs to, and give your map region a descriptive title using the naming conventions your team has agreed on.

Prepare Your Walk Packets

1. Open Your Turfs Folder

From the Main Menu's Canvassing Section or the Sidebar Menu, select Turfs.

CANVASSING
My Turfs Jump to Folders MiniVAN

Filters [Edit](#)

No filters applied.

[Select All 46 Turfs](#)

☐ Turf	Folder	People	Doors	Last Out/Distributed	MiniVAN Status	
☒ Precinct 1	Persuasion Canvass ...	453	385			
☐ Precinct 1 Turf 01	Persuasion Canvass Turfs	50	42	26211855-59582 Printed: 9/17/18 11:50 AM	0	0% ▾
☐ Precinct 1 Turf 02	Persuasion Canvass Turfs	51	42	26211856-74823 Printed: 9/17/18 11:50 AM	0	0% ▾
☐ Precinct 1 Turf 03	Persuasion Canvass Turfs	69	57	26211857-66216 Printed: 9/17/18 11:50 AM	0	0% ▾
☐ Precinct 1 Turf 04	Persuasion Canvass Turfs	30	25	26211858-39828 Printed: 9/17/18 11:50 AM	0	0% ▾
☐ Precinct 1 Turf 05	Persuasion Canvass Turfs	67	61	26211859-28466 Printed: 9/17/18 11:50 AM	0	0% ▾
☐ Precinct 1 Turf 06	Persuasion Canvass Turfs	55	51	26211860-34922	0	0% ▾

Quick Actions
 Print
 Export
 Generate List Number
 Send To MiniVAN
 Print Region Summary

2. Select the Turfs to Print

Select the checkbox next to the turfs you would like to print. Then select Print from the Quick Actions drop-down menu. (Alternatively, if you're using MiniVAN for your canvass, you can send the turfs directly to MiniVAN or generate the list number and share that with your mobile canvassers).

TIP: If you want to print all the turfs within a given list, select the checkbox next to the list name (in the example above, Precinct 1), and all the turfs within that list will be selected.

3. Confirm Your Selection

A screen will pop up asking you to confirm the turfs you would like to print. Select Next.

4. Select Your Report Format & Script

You should select an appropriate Report Format and Script for the conversations your volunteers will be having. You can preview the report format to make sure it includes the correct information.

5. Select a Contact Method

Select Walk in the Contacted How field. This will populate the sort order with County, Precinct, Street Name, Odd/Even, Street Number, and Apartment as shown on the right.

6. Enter a Title

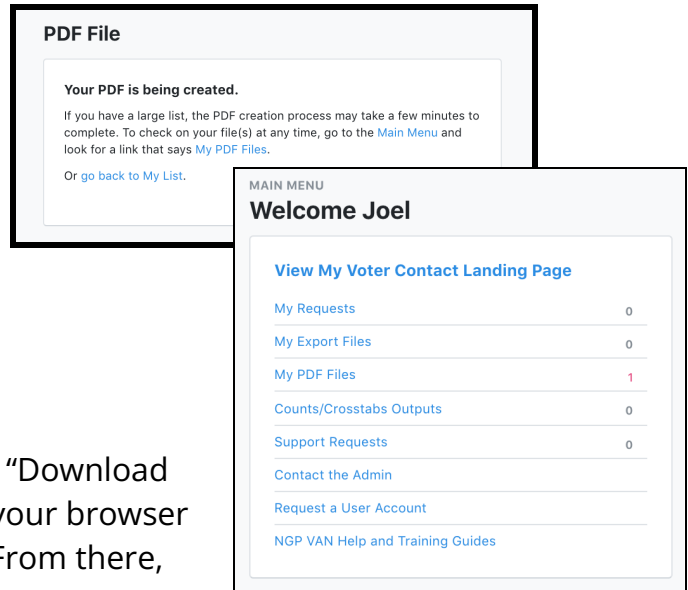
Give your list a descriptive title using the naming conventions your team has agreed on.

7. Final Options

In most cases, the default options at the bottom of this page should be sufficient for your needs. Click Print!

8. Go to “My PDF Files”

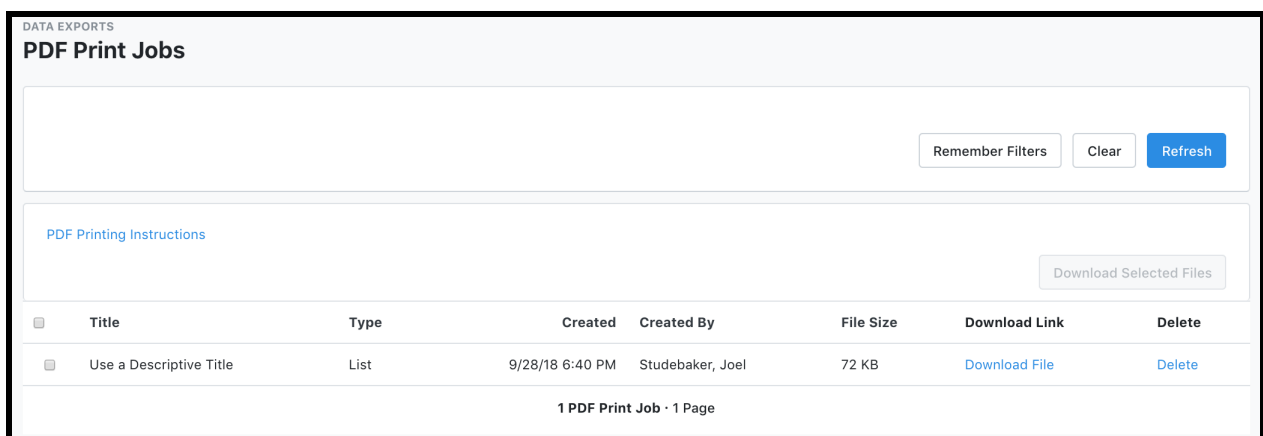
Your PDF is now being created! It may be ready immediately or take a few minutes depending on the size of your list. You can click on “My PDF Files” on this page (see top) or on the Main Menu (see bottom) to find the PDF of your list.



9. Select “Download File”

On the PDF Print Jobs page, you can select “Download File” to download the PDF. It may open in your browser or prompt you to save it to your desktop. From there, you should be able to print normally.

TIP: You can select multiple files using the checkboxes on the left side of the screen, and then select “Download Selected Files” to download all of the files you’ve selected.



Creating Survey Questions & Activist Codes

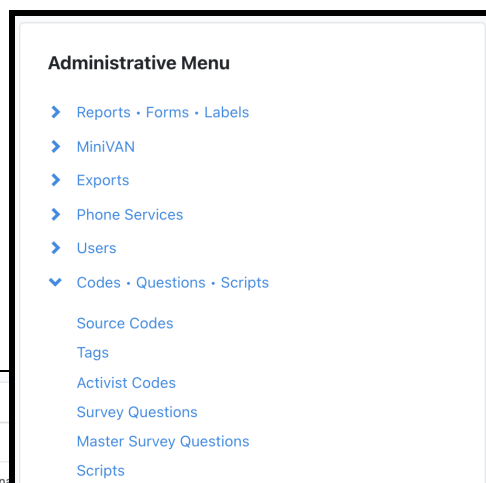
Survey Questions and Activist Codes are a critical part of voter contact, allowing organizers to store and utilize important information about voters or volunteers. The process for Survey Questions and Activist Codes is very similar. Make sure you start by confirming you're on the right side of VoteBuilder (MyVoters vs MyCampaign).

1. Go to 'Codes • Questions • Scripts'

Go to the Admin panel on the Main Menu and click Codes • Questions • Scripts. Then, select **Survey Questions** or **Activist Codes** from the drop-down.

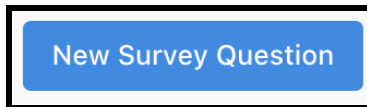
Once there, you're able to edit existing Survey Questions and Activist Codes, or create new ones.

ID	Database	Cycle	Type	Long Name	Question
454671	My Voter File	2022	Action	Plan 2 Vote	What is this voter's plan to vote?
454359	My Voter File	2022	Candidate	Iqbal Support	Can I count on you to vote for Aisha Iqbal for State Senate?
458520	Both	2022	Candidate	State Senate	Do you know which candidate you are supporting for the 2022 State Senate race?
455891	Both	2022	Volunteer	Midterm Vol22	Do you plan to volunteer for the Midterm Elections in 2022?
454362	Both	2022	Volunteer	Volunteer Ask	Can I count on you to volunteer with us?
457905	My Campaign	2021	Party	Party Ask	Are you a Democrat or do you support the Democratic Party?
6 Survey Questions - 1 Page					



2. Create a New Code or Question

To create a new question or code, click on Create New Survey Question or Create New Activist Code in the top-right corner of the screen.



3. Complete the Details

Complete the details and enter the text for your question or code. When you're done, hit Save. (For Activist Codes, this is all you need to do.)

New Survey Question

Save

Survey Question

Cycle* 2020

Type* Action

Long Name* Plan to Vote?

(Español)

Medium Name* P2Vote

(Español)

Short Name* P2V

(Español)

Question* What is your plan to vote?

4. Enter Your Response (Survey Questions Only)

You can enter as many responses to a Survey Question as you need - from a simple yes or no, to a 1-5 Candidate ID scale.

Response English [Español]	Resp Medium Eng [Esp]	Resp Short Eng [Esp]	Master Response
Already Voted [Already Voted]	Alv [Alv]	V [V]	⌵ Edit
Early Vote [Early Vote]	Ear [Ear]	E [E]	⌵ ⌵ Edit
Absentee Requested [Absentee Requested]	Abs [Abs]	A [A]	⌵ ⌵ Edit
Election Day [Election Day]	Ele [Ele]	D [D]	⌵ Edit Delete
			⌵ Add

Creating Recruitment & Voter Contact Scripts

Once you have created Survey Questions and Activist Codes, put them into a Script and you'll be ready to start contacting voters for your campaign. Building a script is an easy process of assembling various elements. Make sure you start by confirming you're on the right side of VoteBuilder (MyVoters vs MyCampaign).

1. Go to 'Codes • Questions • Scripts'

Go to the Admin panel on the Main Menu and click Codes • Questions • Scripts. Then, select **Scripts** from the drop-down.

ID	Name	Description	Created By	Date	Active
504387	Aisha Iqbal GOTV Script		Matt Burke	4/28/21	■
511057	Branching Aisha GOTV MiniVAN Script	MiniVAN example script	Peter Dougherty	6/21/21	■

2. Edit or Create a Script

Edit an existing script or add a new script. If creating from new, give your script a name and description.

3. Choose Your Script Type

Branched scripts are responsive to the ways that voters answer questions, leading your canvassers to different follow-up conversations based on the response — these are best for canvasses. Linear scripts are fixed, and your canvasser will just read through it in order — these are best for phone banks.

Script Type ☐ Linear
Linear scripts offer the format of stacked elements with no conditional statements.

☒ Branched
Branched scripts are reserved for **Open Virtual Phone Bank and MiniVAN use only**. Create multiple script paths for your canvassers.

4. Add Text

On the **Add Script Element** panel, type your desired script introduction into the Text field. When satisfied, click Add, and a preview of that text will populate in the Script Preview Panel.

5. Add Survey Question or Activist Code Question

To insert a Survey Question, Activist Code, or Event invitation into a script, select them from the drop down menus, and click Add. The element will populate in the script preview.

6. Edit or Adjust

Script elements can be edited or deleted from the preview panel using the buttons to the right, and rearranged by clicking and dragging the buttons to the left. If it's a branched script, you'll also be able to indicate which responses lead to which parts of the script.

7. Choose Canvass Result Option

Before saving, make sure to review the Canvass Result options on the right-hand side of the screen - the default settings for phone results and walk results will already be selected, but selections can be added and removed as necessary.

Canvass Result Options

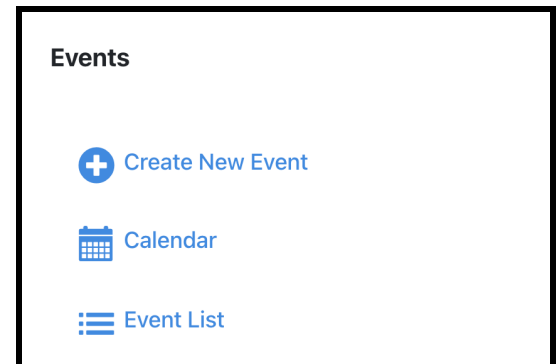
If a person could not be contacted with this survey, you may support other canvass results options (e.g. Not Home). Select the options you'd like to support for each of the following canvass types:

Creating Events and Closing Volunteer Shifts

VoteBuilder allows organizers to easily track and manage volunteers as they sign up to attend events. The My Campaign main menu features an Events panel, where you can easily create a new event, view your campaign's event calendar, and access other event and participant data.

1. Create a New Event

In MyCampaign, select **Create New Event**. (The command to create a new event can also be accessed through the calendar or event list pages.)



2. Select Event Type

The type of event (such as canvass, phone bank, or house party) will determine the volunteer roles that attendees can sign up for. You can create new custom event types in the Administrative Menu, but VoteBuilder is populated with default options for the most common campaign events.

3. Enter Event Details

Go through each tab of the editing process, filling in the information on each tab. Organizers have the ability to set general information, number of shifts, create regularly recurring events, adjust the roles that attendees can sign up for, and choose sharing and publishing settings.

4. Publish the Event

When all information is set, select **Finish** to publish the event. Organizers can now begin adding attendees through phone bank or canvass scripts, online sign-up forms, or any data entry method.

5. Edit and Monitor the Event

Once the event is published, organizers can access the back end (to edit and track RSVPs) by selecting it from the Calendar or Event List.

 [Calendar](#)

 [Event List](#)

 [Event Participant List](#)

6. Close Shifts

To view all participants for upcoming events and edit their status, access the Event Participant List from the Events panel of the Main Menu.

Quick Actions

☐	VanID	Event	Date	Time	Location	Name	Phone	Cell Phone	Email	Role	Status
☐	101780872	 Weekend Canvass for Aisha Iqbal	7/24/21	12:00 PM - 7:00 PM		Wessels, Gene	(555) 707-8872			Volunteer	Scheduled 
☐	101780804	 Weekend Canvass for Aisha Iqbal	7/24/21	12:00 PM - 7:00 PM		Mines, Carol	(555) 792-1471			Volunteer	Scheduled 
☐	101781094	 Weekend Canvass for Aisha Iqbal	7/24/21	12:00 PM - 7:00 PM		Stoneburner, Teresa	(555) 270-4325			Volunteer	Scheduled 
☐	101781104	 Weekend Canvass for Aisha Iqbal	7/24/21	12:00 PM - 7:00 PM		Breetzke, Dawn	(555) 855-4688			Volunteer	Scheduled 
☐	101781005	 Weekend Canvass for Aisha Iqbal	7/24/21	12:00 PM - 7:00 PM		Stanley, Sharyl	(555) 267-4207			Volunteer	Declined 

Aside from inviting, scheduling, and confirming attendees for events, it is also important for organizers to “close out” an event after it has occurred - changing each attendee’s status to “Completed” or “No Show.” To update multiple participants at once, select them by checking the boxes before their records, and then choosing **Quick Actions** > Update Status.

Using Counts & Crosstabs

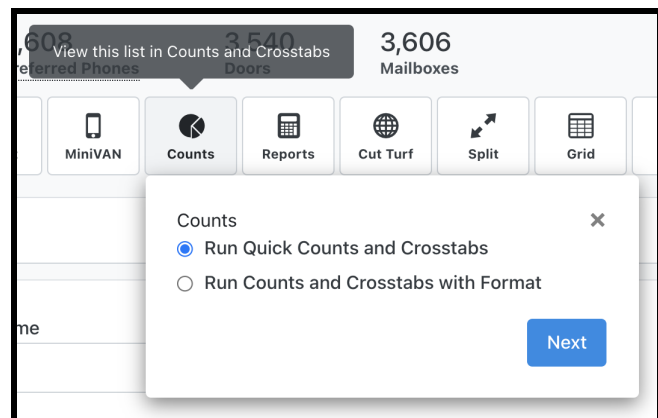
Counts and Crosstabs is a VAN feature that lets you analyze and compare various data types in your list or in your committee's universe at large.

1. Run Quick Counts

There are two ways to use Counts and Crosstabs — either on a specific list or on all registered voters or volunteers within your committee:

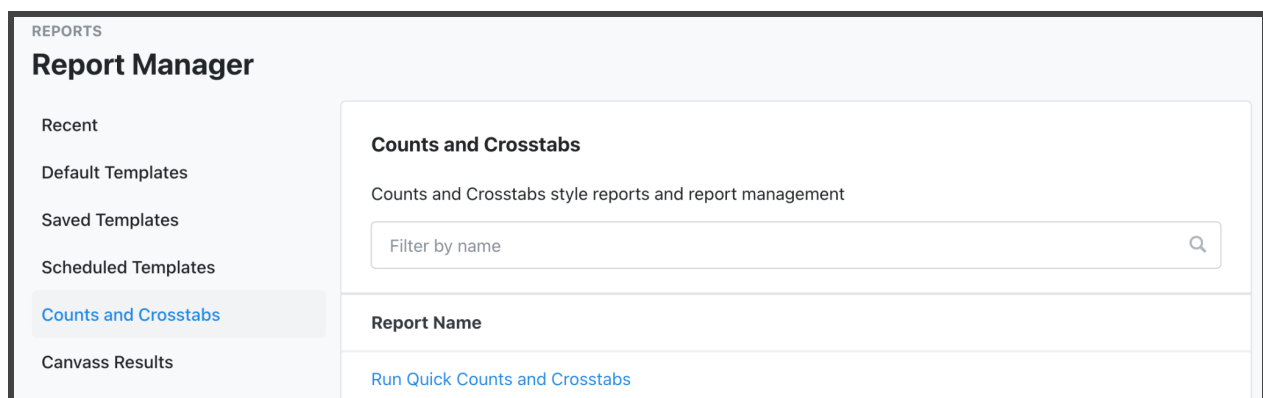
A) Specific List

To run Counts and Crosstabs on a specific list, create your list and then click **Counts** > Run Quick Counts and Crosstabs



B) All Registered Voters

To run Counts and Crosstabs on your whole universe, go to the Main Menu and select the **Report Manager**. Then click "Counts and Crosstabs" on the left-hand side and select "Run Quick Counts and Crosstabs."



2. Select Your Criteria

From the Counts and Crosstab page, select the criteria for your table. Columns are the criteria listed on the right hand column, and that criteria runs across the table in each row. Crosstabs are the criteria at the top of the table, and those criteria run down the length of the table.

Section 1
Crosstab 1

Section 2
Crosstab 1

Section 3
Crosstab 1

☐ Show Group Totals

[None]
Data Field

☐ Show Percentages

☐ Show Percentages

☐ Show Percentages

Column 1

Column 2

Column 3

Column 4

People from Registered Voter

Refresh Results

Certain options are only available in the “Columns” section, like home district information (county, precinct, etc.). In the “Crosstabs” section, you can choose from demographic information, voting scores, activist codes, or survey questions responses, to name a few of your options.

3. Review Your Table

Once you’ve selected your criteria, hit **Refresh Results** and review your table.

County	Precinct	Age						Total People
		18 to 24	25 to 34	35 to 49	50 to 64	65+	Unknown	
Baker	Precinct 1A	0	382	526	674	624	0	2,206
Baker	Precinct 2A	0	470	699	854	785	0	2,808
Baker	Precinct 3A	0	535	788	929	842	1	3,095
Baker	Precinct 4A	0	38	47	52	57	0	194
Baker	Precinct 4B	0	80	137	190	164	0	571
Baker	Precinct 4C	0	222	293	379	379	0	1,273

If you'd like to do additional visualization such as bar graphs or pie charts, you can click Export to Excel in the upper right corner. This will export your current report and you can work with it as an excel file for additional uses.

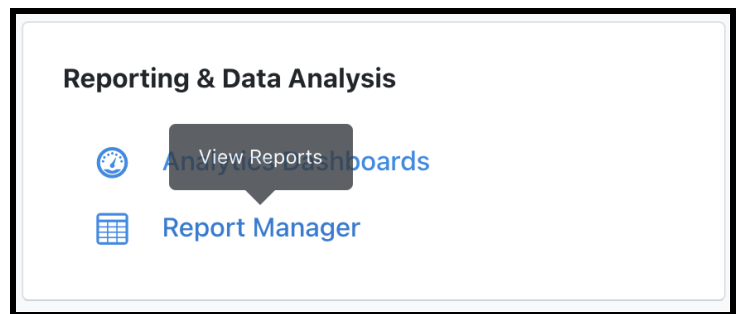
Export To Excel

Using the Report Manager

VoteBuilder's Report Manager comes preloaded with more than 20 data report formats. Your campaign can use these core report templates, or customize and save them as new. While specific reports vary in the way you pull them, the basics are the same: run the report, select your filters, and edit your reporting columns to find the information you want

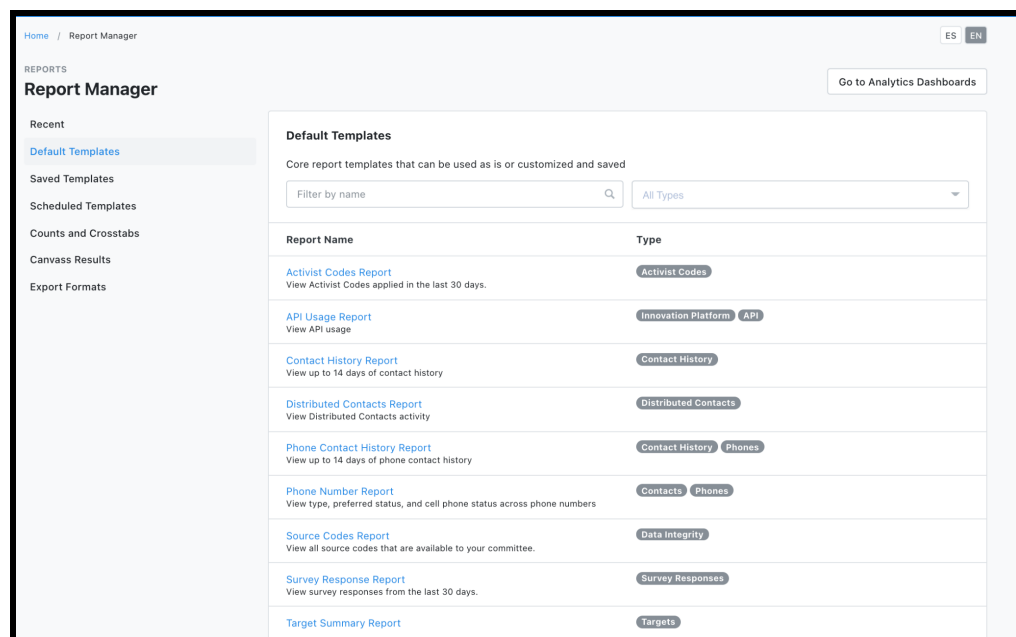
Accessing the Report Manager

The Report Manager is available from both sides of VoteBuilder — it will depend on the type of information you are looking for. When you're on the right side, navigate to the Reporting & Data Analysis panel of the Main Menu, and select Report Manager.



Choosing Your Report

While we can't cover every single report in this user guide, you should spend time getting familiar with the different formats and what information each can provide. We've included some of the more useful report formats and information on what they do.



- **Activist Codes Report:** View which activist codes have been applied to your voters or volunteers in the past 30 days. Edit the reporting columns so that you can see which canvasser or caller initiated those conversations.
- **Canvass Summary:** Available from the “Canvass Results” tab within the Report Manager. Pull a report that shows your canvassing or phone banking results. Edit your reporting columns and group data by team or political jurisdiction.
- **Contact History Report:** Analyze who your campaign or organization has been contacting, how they’ve been contacting them, and which organizers or volunteers have been reaching out.
- **Survey Response Report:** Assess how your voters or volunteers have been responding to specific survey questions over the past 30 days. Edit the reporting columns so that you can see which canvassers initiated those conversations.

VoteBuilder Glossary

Review this VoteBuilder Glossary for definitions of the terms used throughout this guide as well as our suite of VoteBuilder courses.

- **Activist Codes Field:** These function like tags and are available as a type of filter when creating a list. For example, you might create a list of potential volunteers by filtering by a volunteer Activist Code.
- **Addresses Field:** This field allows you to search all current address records associated with a person. Some records contain separate voting and mailing addresses.
- **Age - Registration Date Section:** The data available in this section, allows you to create a list targeting voters based on age ranges and/or voter registration dates.
- **API Saved Lists Section:** This section allows you to run a search based off a list that has been imported from an external source into VoteBuilder through its API.
- **Attempt:** Any time you knock a door or call a phone number, whether or not anybody answers
- **Base/Party Voters:** Individuals who always support one party (for you, the Democratic Party)
- **Canvass Status Section:** When creating a list, you can use the data from this section to include or exclude voters based on campaign-populated canvass results.
- **Canvassing:** Talking to people at their homes by going from door to door
- **Contact:** Any time you have a conversation with the voter on your list
- **Contact Rate:** The percentage of attempts that result in a contact
- **Counts and Crosstabs:** A function in VoteBuilder that returns counts of people who fall into selected categories. For example, if you selected the

categories of sex and political party, you would see how many total men are on your list and how many women, but also how many women who are Democrats, women who are Republicans, etc.

- **Custom Contact Fields:** This is an advanced feature that can be configured by a VoteBuilder administrator to store and search on data that doesn't fit neatly anywhere else in voter's profile. For example, occupation might be added here in some cases.
- **Cut Turf:** The act of splitting up a list (or segment of a list like precinct) into geographic areas, where each are will be canvasses by one person or team in one shift. The result is a list of the voters to be canvassed and a map indicating where those voters live.
- **Early Voting Section:** This section should indicate whether someone has already requested or voted an early or absentee ballot in the current election. When creating a list, there are times you may want to exclude people who have already early voted. However, double check to make sure that the data is not over from the last election (it may take a few months to clear it out). As a rule of thumb, if you aren't sure what data is in the Early Voting section, talk to your VoteBuilder administrator before using it.
- **Email Section:** If creating a list for an Email campaign, you can choose voters based on their subscription status (can Email or never Email), personal or work email addresses, and even within a specific email domain.
- **High-Frequency Voters:** These people vote in every election, whether it's for president or city dog catcher. Our rule of thumb here is that if someone has voted in all 4 of the past 4 elections (including at least one at the same time/of the same type as your election) you can classify them as a high-frequency voter.
- **Home Districts Section:** This section allows you to search for districts that have been applied to a person's physical Voting Address. Districts criteria includes Media Market, County, Congressional, State Senate, State House, and Precinct. You will likely only have access to records of the voters within your district.

- **Household Party Counts Section:** This section provides you the option of searching for voters based on a range of Democrats or Republicans living in the household.
- **Household Sex Counts:** With this section, you can search based on the number of men, women, or both living in the household.
- **Householding:** Grouping together people on a list who live together.
- **Infrequent (Low-Frequency) Voters:** These people don't vote every election; they may only turn out in presidential years or sporadically for other elections.
- **Likely Party Field:** In states where voters do not register with a political party, this field will be an option. It is an educated guess of the person's political party, based on all the data that we've been able to collect about this voter over time, including things like Activist Codes, Survey Questions, and Voting History.
- **My Campaign Record Section:** If you are using the "My Campaign" side of VoteBuilder, you can search based on whether a voter also has a record in "My Campaign."
- **My Saved Lists Section:** This section allows you to add or remove people from a search based on whether they appear in another previously saved search. For instance, if you're creating a list for a phone bank, you could use this option to remove anyone who already appears on your canvassing list.
- **Name Section:** You can create a list of voters based on their first or last name.
- **NGP VAN:** NGP VAN is the leading technology provider (they supply VoteBuilder) to Democratic and progressive campaigns. Nearly every major Democratic campaign in America is powered by NGP VAN's VoteBuilder software, including the Obama campaign's voter contact, volunteer, fundraising and compliance operations in all 50 states.
- **Notes Section:** If your campaign is making use of the voter record Notes field, you can search for voters with Notes by date range, notes containing specific text or categories, etc.

- **Party Field:** Indicates the political party a voter is registered with, in states where voters can select a political party to affiliate with when they submit their voter registration form.
- **Phones Section:** Limiting a list by this section is useful when creating lists for phone banking or SMS messaging.
- **Persuasion Universe:** The voters you are targeting to convince to vote for you to make up your vote deficit and meet your vote goal
- **Phone Banking:** Talking to targeted people over the phone
- **Precinct:** The smallest geographic unit used to organize voters and conduct elections. A county or city is typically divided up into many precincts. All residents of a precinct typically vote at the same polling place. (However, sometimes more than one precinct will use the same polling place.)
- **Race/Ethnicity Section:** This section allows you to search based on a voter's race/ethnicity. Note that this may search only the race/ethnicity reported in the vital stats section of an individual's voter record, which may be inferred from other sources and may not be based on voter's self-identification.
- **Relationships Section:** This section allows you to create a list of voters who are connected to members of your campaign (like family, friends, colleagues and neighbors). This is only for campaigns using the neighbor-to-neighbor feature of VoteBuilder.
- **Report Format:** Determines which data on each voter is displayed on a list, and its presentation. For example, you will probably use a different Report Format for walk lists and phone bankings lists because you will need addresses on the walk lists but phone numbers on the phone banking lists.
- **Scores:** Scores in VoteBuilder are created from voter data, demographics, self-identification, consumer data and/or polling that are used to **predict** the probability of future outcomes. You can search for voters with a Score that falls within a certain range. Many scores have values between 0-100, where 100 indicates a person is more likely to support (an issue/party) and a 0 indicates an individual is less likely to do so.

- **Script** - As the name suggests, a script is the language that a campaign suggests its volunteers use when speaking to a voter. In VoteBuilder, a Script is comprised of text that volunteers should say, Survey Questions they should ask and record data on (e.g., Can we count on your support for the Democratic candidate?), and a couple other potential fields. The Script that you select fills in the data entry fields on volunteers' canvassing and phone banking lists, and allows for easier data entry.
- **Sex (Source File) Field:** This field allows you to choose to include only men or only women in your list.
- **Suppressions:** A feature of VoteBuilder that removes voters who fit certain criteria from your list. For example, deceased is one of the possible suppression criteria--if someone is marked as deceased in the data, you may not want to include them in your lists since (if the data is correct) they would be unable to vote and hence a waste of time to try and contact. However, in our experience these data tend to be imperfect, so we recommend removing all of the default suppression when creating your lists for voter contact.
- **Survey Questions Section:** Search for voters based on their responses to campaign-populated Survey Questions. Response criteria options are displayed based on the Survey Question selected.
- **Swing voter:** A voter whose voting behavior is difficult to predict--you aren't confident whether they'll support the Democrat or the Republican.
- **Tags Section:** You can search for voters based on Tags (if you are using Tags) that allow you to group and better organize your Activist Codes, Survey Questions, Folders, and Users.
- **Turf:** The geographic area that has been portioned out for one volunteer (or pair) to canvass.
- **Vote Goal:** The number of votes that you are aiming for voters to cast for you in order for you to be celebrating on Election Night (calculated on the Key Field Numbers Workbook).
- **VoteBuilder:** VoteBuilder is also known as VAN (Voter Activation Network, Inc), provided by NGP VAN Inc. VoteBuilder is a powerful tool for targeting voters and helping you contact them. It supports the work of Democratic

campaigns and state and county Democratic Parties of all sizes, all across the country.

- **Voter Deficit:** The difference between your vote goal and the number of frequent base voters in your district (i.e., the number of votes you can count on without working for them).
- **Voter File:** A comprehensive, enhanced database of the people who are registered to vote in a given district. Depending on your state and/or the database software you're using, the voter file may include different types of information on the voters: name, address, phone number, gender, date of birth, party affiliation, vote history, and sometimes much more.
- **Voting History Section:** This section contains a record of whether the individual cast a ballot in previous elections and sometimes the method by which they did so (e.g., absentee ballot, early voting, in-person on Election Day).
- **Voter Status Section:** You can search for voters with Active, Inactive or Provisional voter status.

To access training on using VoteBuilder, visit:
<https://traindems.org/introduction-to-votebuilder>