Bulk Upload Guide

Definitions

Bulk Upload: A bulk upload is a way to load a spreadsheet of data into VoteBuilder to apply values in bulk. A **My Voters** bulk upload will allow you to edit existing voters and will require either a State File ID or a VF VANID in order to complete. With a **My Campaign** upload, you can either create new records (which does not require an ID) or match to existing My Campaign Records (which does require an ID).

VANID: Unique ID that is assigned to every voter once they first register to vote in Massachusetts. There is a unique ID for My Voters and a unique ID for My Campaign. All VANIDs are the same for everyone using My Voters in MA, but every voter has a unique My Campaign ID that only is the ID for that person in your campaign's My Campaign instance.

State File ID: This is the name for the ID that is assigned to a voter by the Secretary of State's office. We store these in VoteBuilder so you can easily upload files from your town or city.

My Voters Uploads

Click here to watch a recording of how to do a My Voters bulk upload! This covers what a bulk upload is, how to format your file, and how to do an upload.

Follow along with the instructions below as you watch the video.

What sort of uploads will you need to do?
- Early Vote data
    - If you're collecting early vote information from your city or town clerk, you can upload this to VoteBuilder to include in your searches.
- Voter contact
    - If you are using Hubdialer or another voter outreach software that doesn't have an integration with VoteBuilder, you'll want to upload the results of that outreach.

Preparing your file for an upload

1. Your file will need to include either a State File ID or a VANID for all voters. This will need to be in the first column of your file in order to avoid errors with your upload.
2. Verify that there aren't any values in the ID column that are not a valid ID. The ID box can be blank for a row if you don't have one, but it can't have something that's not an ID such as N/A.
3. Make sure every column is labeled.
4. The name of the file can't have any weird characters such as a "/". If the name of the file has a date for example, try to use a "." instead of a "/".
5. See this help doc for more information on bulk upload requirements.

Uploading your file

1. Select if you are doing a VANID or State File ID upload. This will be the ID that is in your file.
2. Select your file for the upload. You can either use a .csv/excel/.txt file or you can upload directly from Google Sheets.
3. You can choose to receive a file with your upload that details errors. This help doc explains that option more.
4. If there are any voters in your file that can't be matched to the voter file, you'll get a message on the next step. This just means that these voters don't currently exist in VoteBuilder for whatever reason - such as they've moved or you're working off of a newer version of the voter file than what's in VoteBuilder. If you were expecting everyone to match (for example if you are working off of an autodialer list that you exported the other day), you can export the voters that didn't match to diagnose issues.
5. The most important part of a bulk upload is applying mappings. The mappings tell Votebuilder what to do with your file.
   a. Mappings you may use often are Apply Activist Codes, Apply Survey Questions, Apply Canvass Results, and Save as Saved List.
   b. You can choose the "select column from data file" option with any mapping to apply the value based off of a specific column in your file, rather than applying one value to everything.
      i. For example, if you are uploading IDs, you can choose the column of your file that has IDs to map the appropriate Survey Responses rather than applying one Survey Response to everything.

My Campaign

Coming soon! In the meantime, please review this help doc on bulk uploads or watch the previously recorded data entry and reporting training.

- Watch a recording of our data entry and reporting training here (password is Gs%P^+r2)

What sort of uploads will you need to do?

- Upload a list of donors from an external database or a spreadsheet.
- Upload volunteers that are currently stored externally.
- Upload out of state or out of district supporters.

FAQ

When would you do a Saved List versus using an Activist Code or Survey Question?

- You would do a Saved List if this is a static group of people that won't change, i.e. vote history or early vote data for an election that already happened.
- You would use a code if the list will constantly change and you aren't getting cumulative files.

What if I don't have an ID/what if the voters don't live in my district?

- If you don't have an ID, or need to upload voters that are outside of your district, you will need to do a My Campaign upload.

I'm getting an error message!

- Use this help doc from VAN to diagnose the error.
- Common errors include the first column of your file not being an ID, there being a weird character in your file or file name, or not every column in your file being mapped.
- Usually the error message will describe what went wrong - please read this to try to diagnose the issue.
- If you're getting a generic error message, click the button to submit a support request from that error message - that will tie an error code to your support request so VAN can easier help fix the problem.
- If you reach out to MassDems with your bulk upload errors, please send us a screenshot of the error message and the file, and let us know how you were trying to upload it (MV, MC, with an ID etc.)

Uploading phone numbers
- If you need a file of phone numbers uploaded to VoteBuilder, please reach out to vansupport@massdems.org

Tip: If you are collecting emails in My Campaign, you can bulk upload these to My Voters if VAN Relay has linked your My Campaign records to My Voters. Export from My Campaign using Voter File VANID so you can upload back to My Voters!