

THE OFFICIAL MINI-VANUAL

The official guide to navigating voter and volunteer data using MiniVAN – every organizer’s favorite mobile campaign technology.

WWW.NGPVAN.COM



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An aerial photograph of a city street. The street is lined with various buildings, some with flat roofs and others with gabled roofs. There are several cars parked along the street. In the center of the image, there is a swimming pool. The text "MINIVAN MANAGER" is overlaid in large, white, bold letters. Below it, the text "SMARTER CANVASSING IN REAL TIME." is overlaid in smaller, blue, italicized letters.

MINIVAN MANAGER

*SMARTER CANVASSING
IN REAL TIME.*

Keep your canvassers on track. MiniVAN Manager shows you the vital stats of every canvasser, including location, progress and effectiveness in real time.

[LEARN MORE](#)

WHY MINIVAN?

We built MiniVAN to help campaigns run more efficient canvasses and to improve the experience for canvassers (we're pretty excited to help campaigns reduce their carbon footprint, too).

Campaigns are always short on time. MiniVAN speeds things up. If you don't want to cut turf anymore, you don't have to. Distributed Canvassing automates turf cutting for you. Instead of entering data at the end of the day, household-by-household, you will be able to simply commit the data to the system. It is that easy.

In addition to saving you time and resources (you're welcome), MiniVAN will help you field a more agile and adaptable campaign. One canvasser can work through up to five scripts on the same canvass, allowing you to target your messaging door-by-door. You'll also be able to send canvassers additional turf while they're still on the doors. If you invest in MiniVAN Manager, you'll be able to monitor your canvass in real time and keep your team on track.

MiniVAN also creates a better experience for canvassers. MiniVAN's map view helps canvassers confidently navigate unfamiliar turf. The Find My Next Door feature shows canvassers the three closest un-canvassed houses on their list, helping canvassers quickly orient themselves.

Replacing walkpackets with smartphones means that canvassers no longer have to shuffle paper. You can even build responsive branched scripts that guide canvassers when they're at the door. We've made it easy and intuitive.

The best part? MiniVAN is free to campaigns that are already using VoteBuilder or SmartVAN. Whether you have ten volunteers or a hundred, they can download the app and start hitting the doors today.

“IF IT’S NOT IN VAN, IT DOESN’T EXIST.”

- ANCIENT CAMPAIGN PROVERB

TRANSFERRING YOUR PAPER CANVASS OPERATION ONTO MINIVAN

You already know how to field a great canvass. MiniVAN is here to make it easier. By following these instructions, you can get your mobile canvass up and running.

QUICK START

The transition to MiniVAN canvassing can be as simple or as sophisticated as you want. You do not have to create user accounts, canvassers can create their own ActionID. If you want to get a quick start, make sure that you have a script associated with your turf and ask your canvassers to download the MiniVAN app in the [iOS App Store](#) or [Google Play Store](#). After they create their ActionID, they can input the list number from a turf packet and download it to their device.

This will send all of the components of a walk packet directly onto their mobile device and they can start knocking doors right away.

Turf Packet Summary – Lafayette! Turf 01

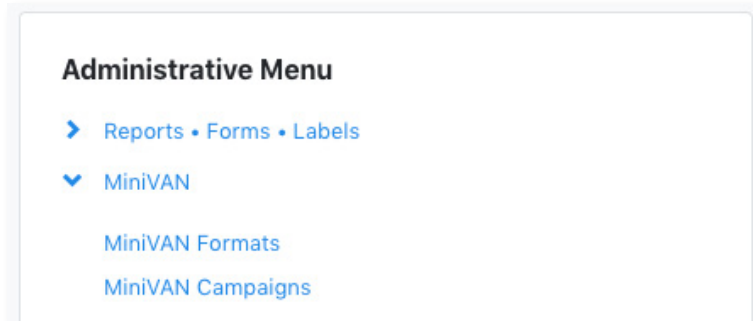
Script: **2016 Demo ID Script - not branched**

Generated **5/10/18 3:14 PM**

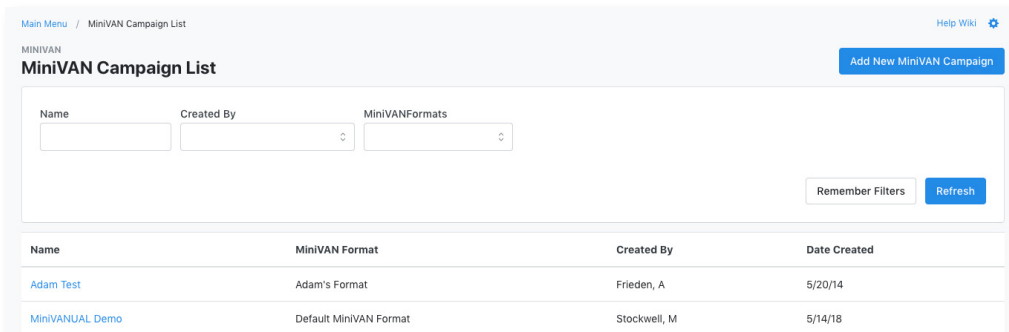
List Number	Turf	People	Doors	Canvasser
23995616-28490	Turf 01	137	76	
23995617-90180	Turf 02	5	3	
23995618-19616	Turf 03	28	15	
23995619-71483	Turf 04	127	64	

CREATE YOUR MINIVAN CAMPAIGN

From the Administrative Menu on the Main Menu of My Voters, select **MiniVAN Campaigns**.

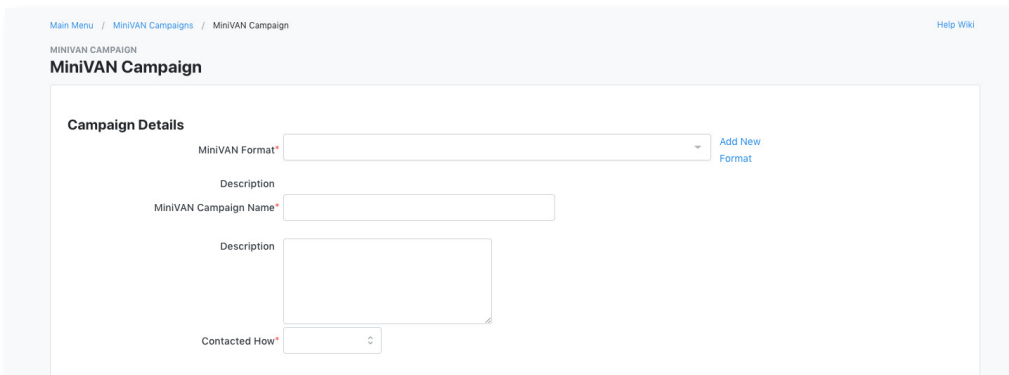


From the MiniVAN Campaign List, select **Add New MiniVAN Campaign** on the upper righthand side.



Under **Campaign Details** on the MiniVAN Campaign page, select your MiniVAN Format. The **Default MiniVAN Format** will work well for most canvasses.

Enter a **MiniVAN Campaign Name** and select a contact method (for a canvass, select **Walk**) from the **Contacted How** dropdown menu.



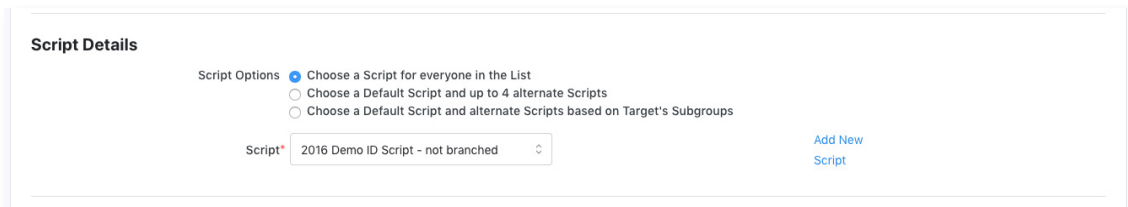
LINK SCRIPTS TO YOUR MINIVAN CAMPAIGN

Within **Script Details**, you are presented with three script options:

Choose a Script for everyone in the List

Choose a Default Script and up to 4 alternate Scripts

Choose a Default Script and alternate Scripts based on Target's Subgroups



The screenshot shows the 'Script Details' interface. It features three radio button options under the heading 'Script Options':

- Choose a Script for everyone in the List
- Choose a Default Script and up to 4 alternate Scripts
- Choose a Default Script and alternate Scripts based on Target's Subgroups

Below these options is a 'Script*' dropdown menu with the text '2016 Demo ID Script - not branched' and a downward arrow. To the right of the dropdown is a blue link that says 'Add New Script'.

Select **Choose a Script for everyone in the List** to address each voter with the same script and use the **Script** dropdown menu to select which script to send out.

Select **Choose a Default Script and up to 4 alternate Scripts** to give your canvassers up to five scripts to employ. Use the **Script** dropdown menu to select your default script and select **Add New Script** on the right to select each additional script.

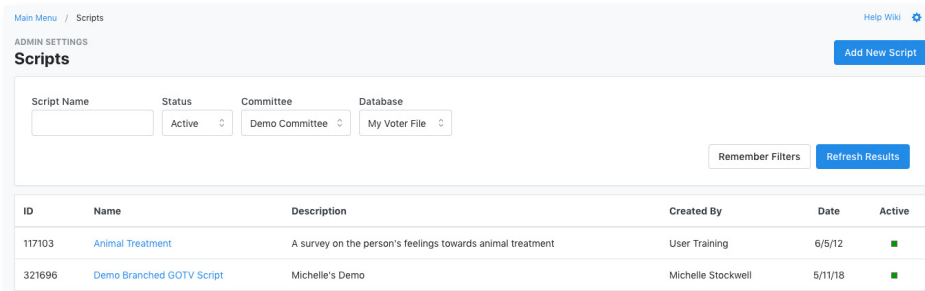
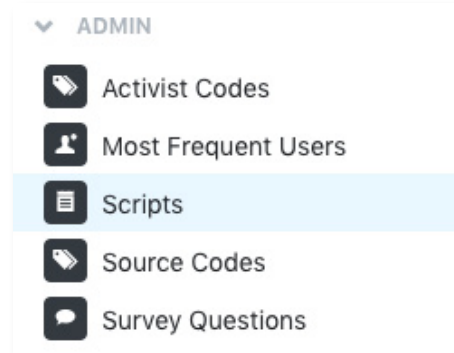
Select **Choose a Default Script and alternate Scripts based on Target's Subgroup** to send out multiple scripts by **Target**. We often see this feature employed by member organizations who are canvassing a list of both members and non-members. This feature would allow canvassers to use different scripts with members and non-members.

CREATING BRANCHED SCRIPTS

Branched Scripts are responsive to the results that your canvassers receive on the doors. The voter's responses will inform the next question.

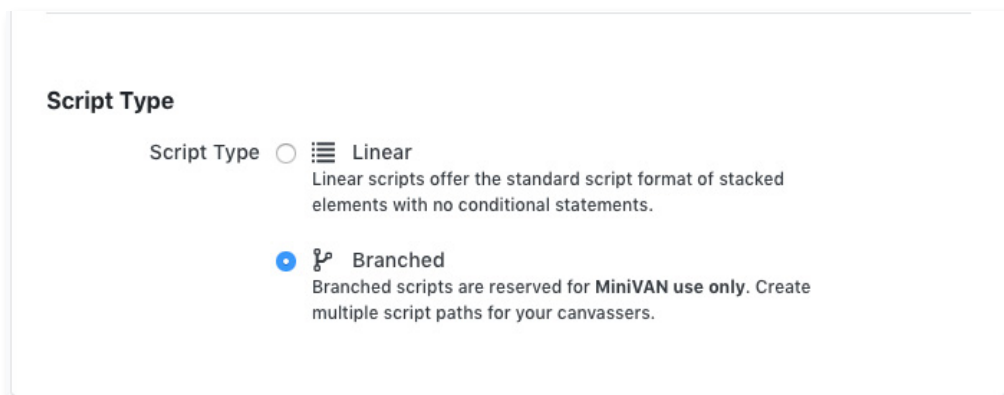
For example, when voters indicate strong support for your candidate, the script could prompt the canvasser to ask if the voter would consider volunteering for the campaign. If a voter indicates that they strongly support the opponent, the script could then prompt the canvasser to politely leave. This makes it easier for canvassers to adapt to new situations on the doors.

To get started, select Scripts from the ADMIN section of the Main Menu. On the upper righthand side of the Scripts page, select **Add New Script**.



After naming your script, you will be able to begin building your script.

Under Script Type select **Branched**.



Using Text Boxes, Survey Questions, and Activist Codes, you can begin to build out a survey. To keep canvassers moving through the script, it is important that each response is linked to its next step.

To link a response to its next step, use the dropdown menu next to the branch icon and select the number of the next question in the sequence or select End to prompt canvassers to end the conversation.

Branched Script Preview

1 Text Hi, my name is _____ and I am a volunteer with the local Democratic Party. Delete Edit

2 Survey Question: Still supporting A few weeks ago, you promised to support our candidate on election day, Tuesday, November 6. Do you still intend to vote for our candidate on Tuesday? Delete

Yes 3

Unsure 6

No End

No Response End

ADVANCED SETTINGS

Advanced

Auto-Sync Enable Auto-Sync

MiniVAN Manager Enable MiniVAN Manager

Online Form

Select **Enable Auto-Sync** to have the MiniVAN app automatically sync back every 5 minutes. We recommend turning on this feature.

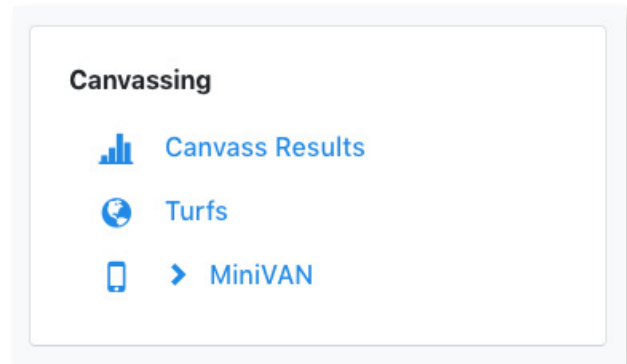
MiniVAN Manager is an add-on accountability tool that shows you the vital stats of every canvasser, including location, progress and effectiveness in real time. Select **Enable MiniVAN Manager** to enable this feature for your campaign.

If you're a user of NGP VAN's industry-leading digital tools, you can attach any of your online action forms quickly and easily. Attaching an online form can help you collect sign-ups and donations directly from the app.

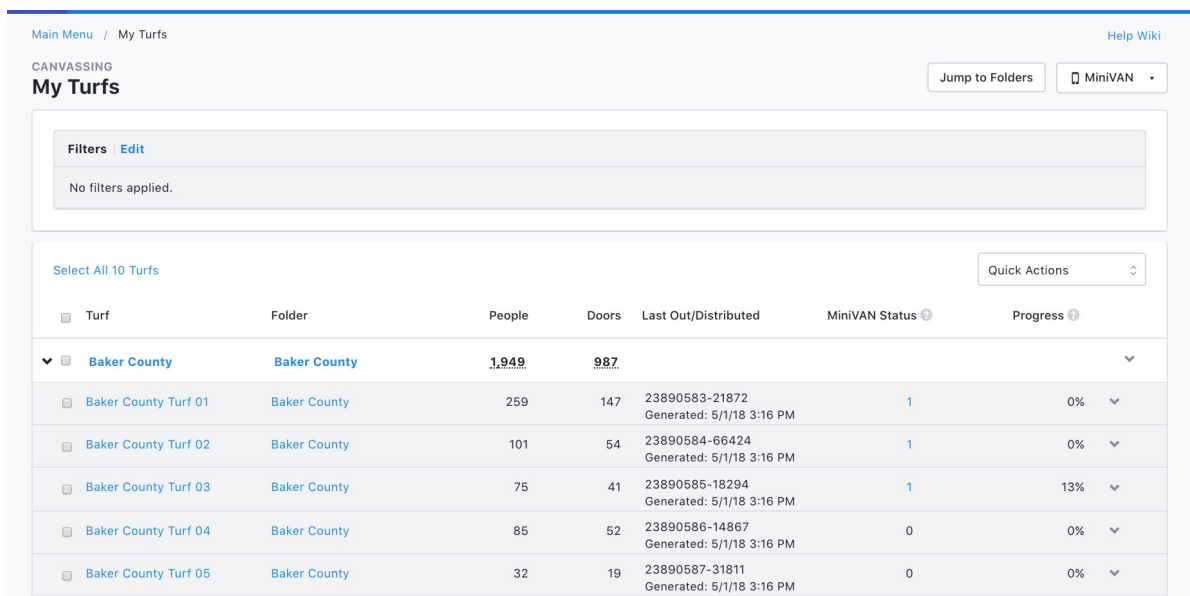
Once you've selected the details of your MiniVAN Campaign on the MiniVAN Campaign page, you can set-it-and-forget-it by clicking **Save** on the bottom of the page.

TURF MANAGER

From the Canvassing section of the Main Menu, select **Turfs**.



On the My Turfs page, select the Turf you intend to canvass by checking the box to the left of the Turf's name. On the upper righthand side, click on the **Quick Actions** dropdown menu.



Main Menu / My Turfs Help Wiki

CANVASSING Jump to Folders MiniVAN

My Turfs

Filters [Edit](#)

No filters applied.

Select All 10 Turfs Quick Actions

<input type="checkbox"/>	Turf	Folder	People	Doors	Last Out/Distributed	MiniVAN Status	Progress
<input checked="" type="checkbox"/>	Baker County	Baker County	1,949	987			
<input type="checkbox"/>	Baker County Turf 01	Baker County	259	147	23890583-21872 Generated: 5/1/18 3:16 PM	1	0%
<input type="checkbox"/>	Baker County Turf 02	Baker County	101	54	23890584-66424 Generated: 5/1/18 3:16 PM	1	0%
<input type="checkbox"/>	Baker County Turf 03	Baker County	75	41	23890585-18294 Generated: 5/1/18 3:16 PM	1	13%
<input type="checkbox"/>	Baker County Turf 04	Baker County	85	52	23890586-14867 Generated: 5/1/18 3:16 PM	0	0%
<input type="checkbox"/>	Baker County Turf 05	Baker County	32	19	23890587-31811 Generated: 5/1/18 3:16 PM	0	0%

When you're ready to send your lists out to your canvassers you can print out a turf packet, send lists directly to the MiniVAN app, or generate list numbers and distribute them yourself. Note that all list numbers will expire after 30 days.

Turf Manager also displays updates about your canvass. MiniVAN Status shows who has downloaded the list. Progress shows the percentage of turf covered by the canvassers using MiniVAN.

PRINTING YOUR TURF

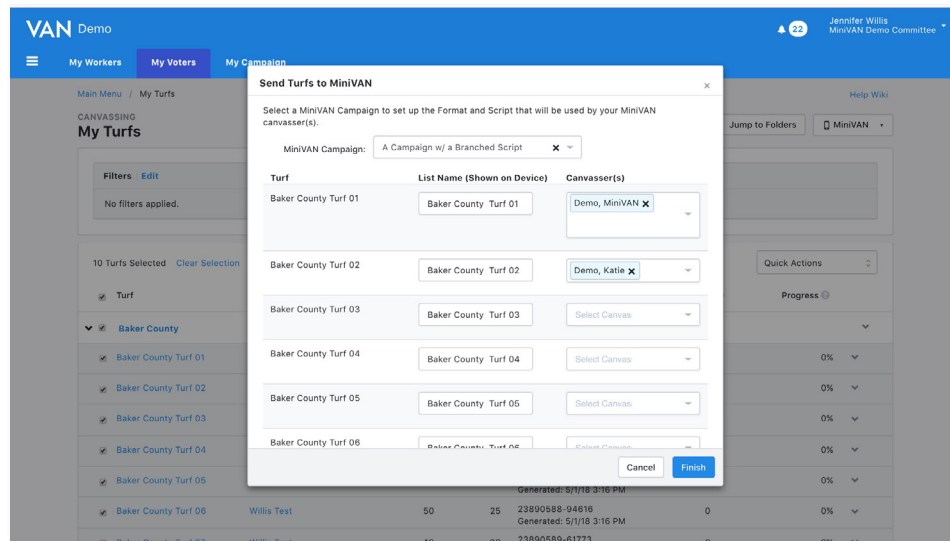
If you'd like to print the entire turf packet, select **Print**. We recommend selecting **Print Region Summary** to print the list sign-out sheet as well as a map and cover sheet for each turf.

Canvassers can then enter the list number listed on the packet.

PUSH OUT LISTS IN BULK

To send the lists out in bulk, select the Turf you intend to canvass by checking the box to the left of the Turf's name. On the upper righthand side, click on the **Quick Actions** dropdown menu and select **Send to MiniVAN**.

The Send Turfs to MiniVAN window will pop up, allowing you to assign canvasser(s) to each block of turf.



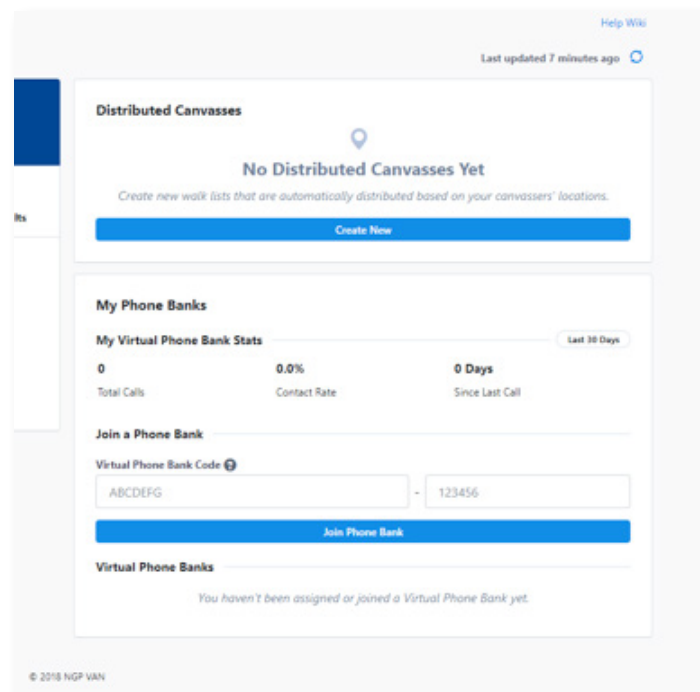
DISTRIBUTED CANVASSING

Distributed Canvassing is designed to completely automate the turf cutting process, saving hours of valuable time for campaign staff and allowing increased flexibility for volunteers.

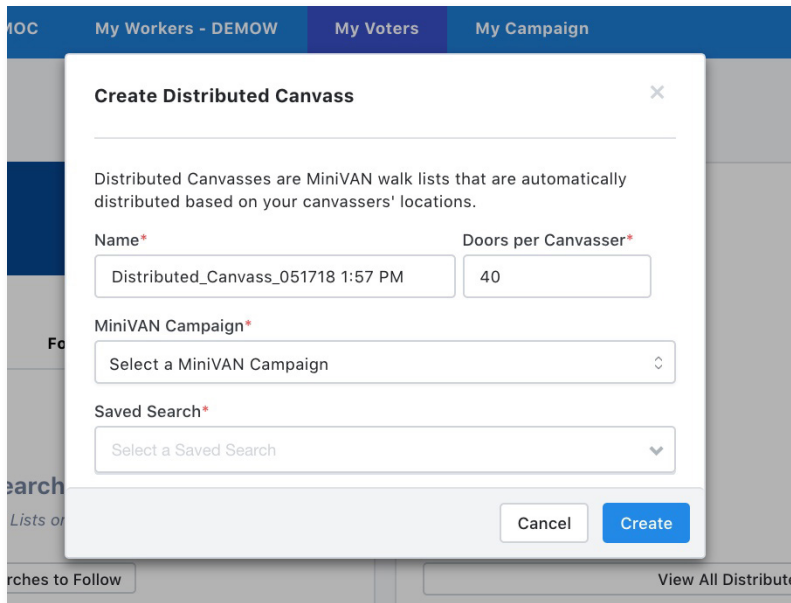
CREATING YOUR DISTRIBUTED CANVASS

When you pull a list for distributed canvassing, be mindful of your turf and volunteers. A volunteer in a suburban or rural setting may be comfortable driving thirty-minutes to reach their turf, but a volunteer in an urban setting may expect turf that is closer to their staging location. Collaborate with your field team to identify which lists are appropriate for which volunteers.

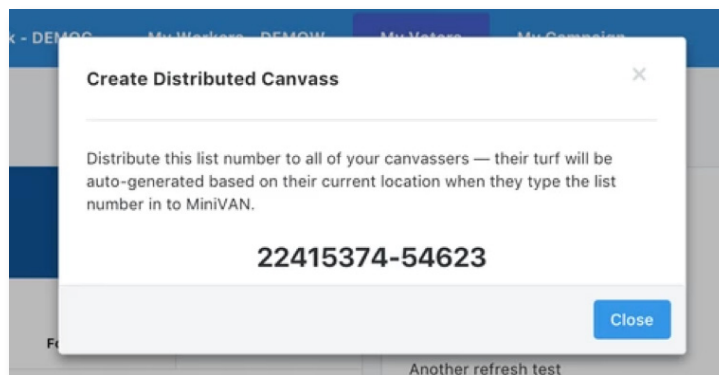
From the Organizer Dashboard, select **Distributed Canvassing**.



In the Create A Distributed Canvass pop-up window, name your canvass and indicate how many doors you want to be assigned to each canvasser. Then select your MiniVAN Campaign and your Saved Search or universe.



Next, you'll see a list number that you can distribute to all of your canvassers. (Each canvasser will use the same list number.) Their turf will be auto-generated based on where they are located when they type the list number into the MiniVAN app. Each canvasser will get a unique list of doors and once a door has been assigned to a canvasser, it can't be checked out by another canvasser for a set period of time.

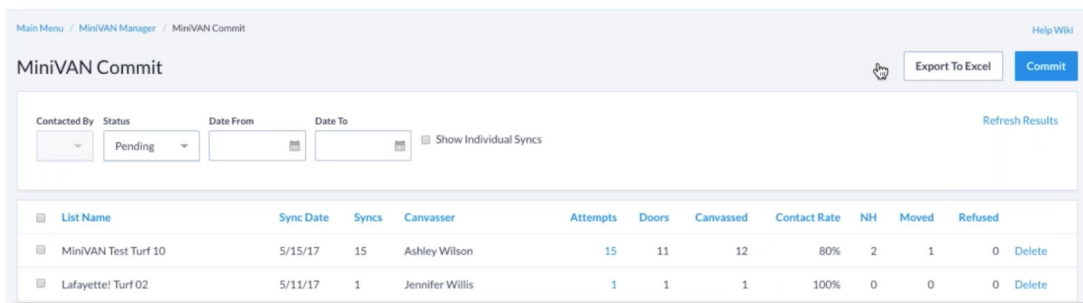


COMMIT AND REVIEW RESULTS

COMMIT YOUR MINIVAN DATA

After people are done canvassing, select Go to Commit Page on the upper righthand side of the screen.

On the Commit Page, you will see the canvass results broken down by canvasser. You can also click the on numbers listed under Attempts to see a breakdown of the individual responses on the doors.



When you're ready to commit the data, select the checkbox next to **List Name** and select the **Commit** button on the upper righthand side. This will enter your data into VAN.

REVIEW YOUR RESULTS

From the Canvassing section on the Main Menu Screen, select **Canvass Results** to view the results of your canvass. On the upper righthand side, select **Export to Excel** to download an Excel report of your canvass. The report will include the names of your canvassers, the number of contacts canvassed and attempted, and statistics about the contact rate and efficiency of the canvass.

EDITABLE JOBS (ADVANCED FEATURE FOR LABOR ORGANIZING)

We created the editable jobs feature to support the needs of union organizers. You can enable this feature and select which jobs are editable when you set up your MiniVAN Campaign.

In order to enable the jobs section when creating a MiniVAN Campaign, you must select a MiniVAN format with jobs fields. Then, in the jobs section of a MiniVAN Campaign, select the **Enable Edit Jobs On MiniVAN** checkbox.

You will then have the option to limit jobs by Termination Status and Employer.

The screenshot shows a configuration window for the 'Jobs' section of a MiniVAN Campaign. It is divided into three main sections: 'Jobs', 'Advanced', and 'Permissions'.
Jobs Section:
- 'Limit Jobs by Termination Status' is set to 'Include Only Terminated'.
- 'Limit Jobs by Employer' has two selected filters: 'ABC' and 'NGP VAN'.
- 'Edit Jobs on MiniVAN' checkbox is checked, with the label 'Enable Edit Jobs on MiniVAN'.
Advanced Section:
- 'Auto-Sync' checkbox is unchecked, with the label 'Enable Auto-Sync'.
- 'MiniVAN Manager' checkbox is unchecked, with the label 'Enable MiniVAN Manager'.
- 'Online Form' section shows 'No Online Forms Available' and an empty 'Online Form Url (500)' input field.
Permissions Section:
- 'Committee Access' checkbox is unchecked, with the label 'Enable Committee Sharing'.
At the bottom right, there are four buttons: 'Cancel', 'Delete', 'Save As', and 'Save'.

If canvassers encounter inaccurate or new job information, they can easily edit that information in the MiniVAN app. When the canvasser syncs their data, the changes will be sent back to VAN. Canvassers will also be able to enter job information when they add a new contact in the app.

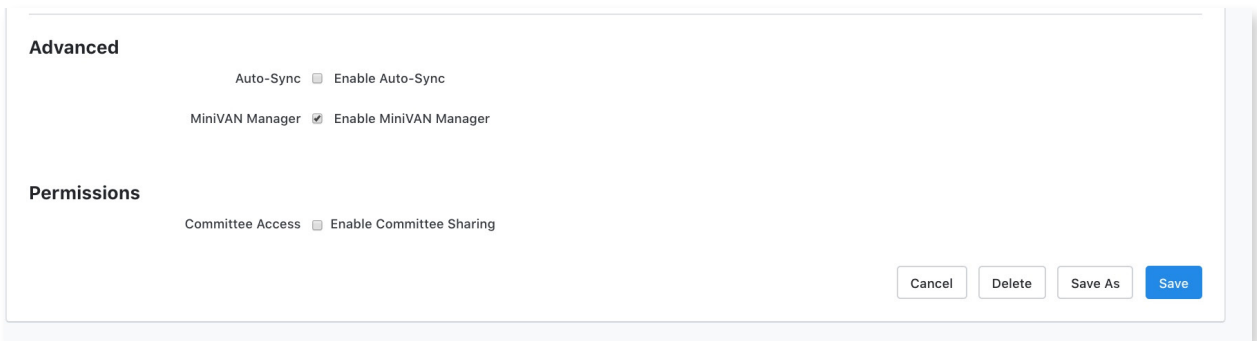
MINIVAN MANAGER

MiniVAN Manager is an add-on accountability tool that shows you the vital stats of every canvasser, including location, progress, and effectiveness in real time.

SET-UP MINIVAN MANAGER

On the lower lefthand side of the dashboard, select **MiniVAN Campaigns** from the MiniVAN dropdown menu.

Select the campaign that you'd like to enable MiniVAN Manager for from the list. You can do so on an existing campaign or by creating a new one. Then on the MiniVAN Campaign page, check the **MiniVAN Manager** box to enable MiniVAN Manager. While on this page, make sure that your MiniVAN campaign is clearly labeled.



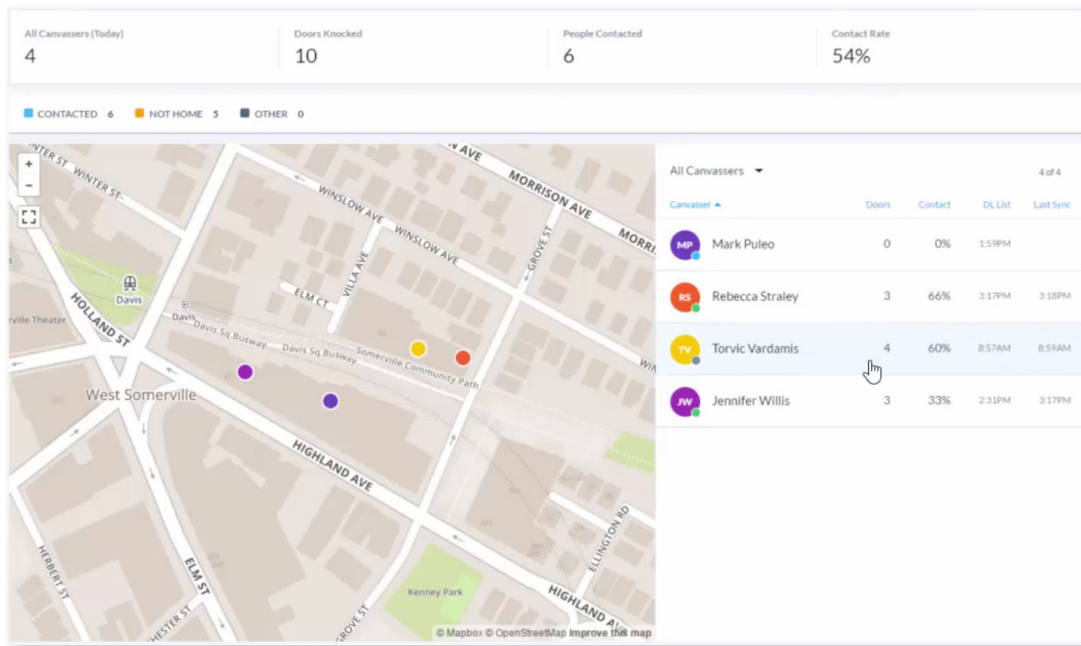
The screenshot shows a settings form with two sections: **Advanced** and **Permissions**. In the **Advanced** section, there are two rows of settings: "Auto-Sync" with an unchecked checkbox and "Enable Auto-Sync", and "MiniVAN Manager" with a checked checkbox and "Enable MiniVAN Manager". In the **Permissions** section, there is one row: "Committee Access" with an unchecked checkbox and "Enable Committee Sharing". At the bottom right of the form are four buttons: "Cancel", "Delete", "Save As", and "Save".

You can send a MiniVAN Manager enabled list to your canvassers via Turf Manager, My List, or a printed list number.

MONITOR THE CANVASS IN REAL TIME

Once you have pushed the list out to the devices of your canvassers, return to the Main Menu and select **MiniVAN Manager**.

This will bring you to the Canvasser Activity page which will display canvass results in real time. The top bar shows an overview of the canvass' progress. The Map displays the location of each of your canvassers. Each canvasser will be represented by a different color dot. The map will update automatically.



By selecting a canvasser's dot directly, you'll be able to see the progress that they've made on the doors. As you adjust the view of the map, the list will automatically filter to display only the canvassers within your map view.

On the right, you'll see a list of your canvassers. When you select their name, you will be able to view their synced results.

From the upper right hand side of the list, use the dropdown menu to toggle between different statuses:

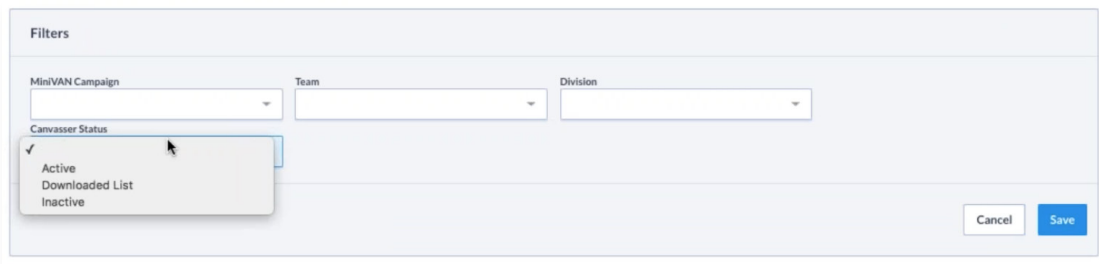
All Canvassers will display the whole team assigned to the canvass.

Active Canvassers will display canvassers who have synced back information in the last 90 minutes.

Downloaded List will display canvassers that have not synced back any data since downloading the list.

Inactive will display canvassers that have not synced back any data in the last 90 minutes.

In addition to filtering by Canvasser Status, you can also Filter by MiniVAN Campaign, Team, and Division. Enable these filters, by selecting **Edit** in the grey Filters bar.



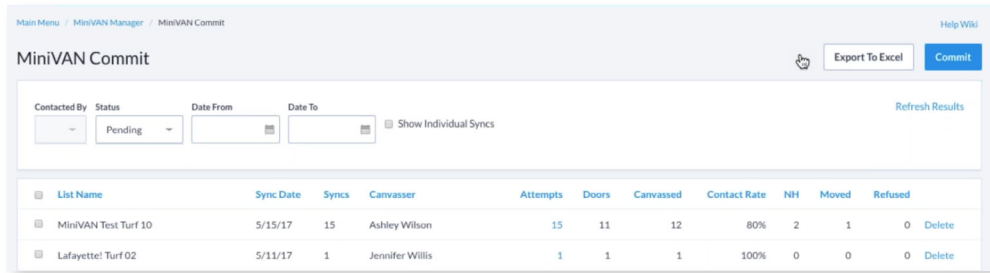
You can also re-sort the list of canvassers by Doors, Contact, downloaded list (DL List), and their Last Sync.

You can hide the Canvasser Panel on the right by selecting the square icon on the Map.

COMMIT AND REVIEW RESULTS

COMMIT YOUR MINIVAN DATA

After people are finished canvassing, select **Go to Commit Page** on the upper righthand side of the screen.



On the Commit Page, you will see the canvass results broken down by canvasser. You can click the on numbers listed under **Attempts** to see a breakdown of the individual responses on the doors.

When you're ready to commit the data, select the checkbox next to **List Name** and select the **Commit** button on the upper righthand side. This will enter your data a into VAN in bulk. If you find that any data is inaccurate, you can uncheck the box of the canvasser whose data you wish to exclude.

REVIEW YOUR RESULTS

From the Canvassing section on the Main Menu Screen, select **Canvass Results** to view the results of your canvass. On the upper righthand side, select **Export to Excel** to download an Excel report of your canvass. The report will include the names of your canvassers, the number of contacts canvassed and attempted, and statistics about the contact rate and efficiency of the canvass.

STREET TEAM CANVASSING

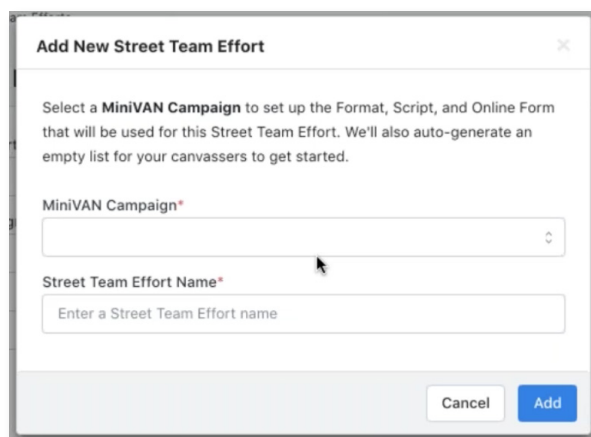
Street Team Canvassing allows you to ditch your list and build your base of new supporters. Your team will be able to collect information and add records directly to the MiniVAN app. Canvassers will also be able to collect contributions if that feature is enabled in your MiniVAN Campaign.

STREET TEAM EFFORTS

From the Canvassing section on the Main Menu, Select **Street Team Efforts**.

Select **Add New Street Team Effort** on the upper righthand side of the page.

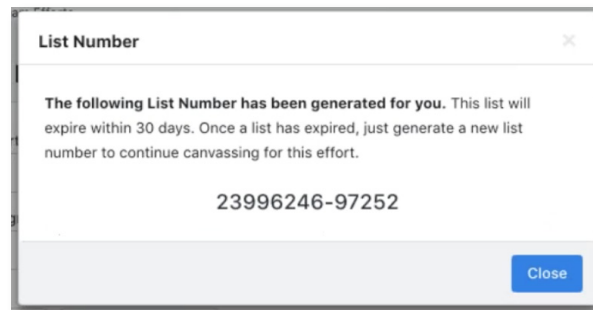
From the pop-up window, select your MiniVAN Campaign from the dropdown menu. This MiniVAN Campaign will include the Format, Script(s), and Online Form that will be used for this Street Team Effort. Then add a Street Team Effort Name.



The screenshot shows a pop-up window titled "Add New Street Team Effort" with a close button (X) in the top right corner. The window contains the following text: "Select a **MiniVAN Campaign** to set up the Format, Script, and Online Form that will be used for this Street Team Effort. We'll also auto-generate an empty list for your canvassers to get started." Below this text are two input fields: "MiniVAN Campaign*" which is a dropdown menu, and "Street Team Effort Name*" which is a text input field with the placeholder text "Enter a Street Team Effort name". At the bottom right of the window are two buttons: "Cancel" and "Add".

This will automatically generate a list number that you can distribute to your canvassers. Canvassers should enter the most recent List Number into the MiniVAN app to see the Street Team Effort on their device.

Canvassers will then see a pop-up after creating or refreshing their Street Team Effort with their new list number, so they can start canvassing right away.



A new landing page will appear in the MiniVAN app that will count the Number of Contacts and the Amount Raised.

SETTING UP MINIVAN CONTRIBUTIONS IN VAN

From the Advanced Features setting of the MiniVAN Campaigns Page, select a Contribution Form from the **Online Form** dropdown.

When an Online Form is selected, canvassers will be able to accept credit card contributions. If the designation associated with the online form allows Cash and/or Check contributions, the user can check the Cash and/or Check boxes to allow canvassers to record Cash and/or Check contributions in the app.

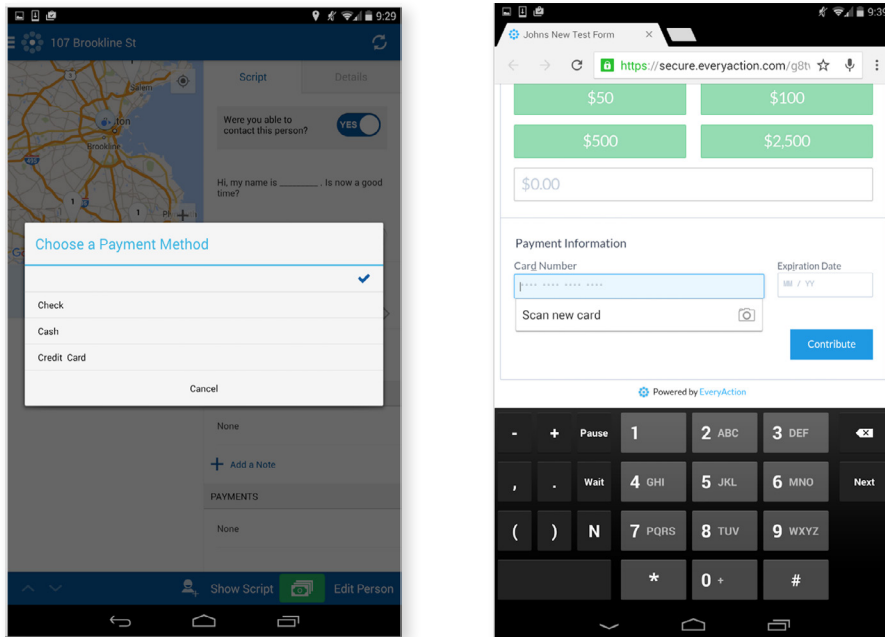
REVIEWING MINIVAN CONTRIBUTIONS IN VAN

If MiniVAN Contributions are enabled, users will see Contribution Information on the MiniVAN Commit page.

NOTE: Credit Card Contributions are created via Online Forms at the time the contribution is processed. Committing the MiniVAN data will find the Contribution/Associated Record and apply contact history and canvasser attribution.

COLLECTING A CONTRIBUTION IN MINIVAN

If MiniVAN Contributions have been enabled, canvassers will be able to collect contributions. A green payments button will appear on the bottom navigation bar. Clicking on the green payments button will allow the canvasser to select a payment method (Cash/Check/Credit Card). The associated Online Actions Form/ Donation Page will open in Chrome or Safari.



For Credit Card contributions, the canvasser can use the Scan Credit Card option instead of manually typing in credit card information.

Canvassers must hit the Back to MiniVAN link at the top of the page to return to the app.

TIPS ON TRANSITIONING TO A MOBILE CANVASS

1. Make a Decision and Commit to it

Once you've decided to switch to mobile canvassing, make a complete transition. Let your team and volunteers know that your canvass is now a fully mobile operation and don't offer them the option to continue using paper walk packets.

2. Invest in a few Tablets

This transition will greatly reduce the amount of paper and ink your campaign goes through, saving you money. We recommend re-investing those savings in your canvass operation by purchasing a couple of tablets. This will ensure that all volunteers are able to participate in your canvass, even if they don't own a smartphone or feel comfortable using their own device. Please note that phone data is not required to use MiniVAN. Canvassers can download the list and sync the results back using WiFi.

If your canvassers lose their signal, MiniVAN will queue up data when they're off the grid and syncs the data when they get back in range.

3. Create a Phone Charging Station

Be sure to have a power strip with multiple phone chargers available for your volunteers to use. You should have chargers for iPhones, Android Phones, and tablets.



PREPARING CANVASSERS TO USE MINIVAN

CREATING TRAINING MATERIALS

Your volunteers are showing up to support you and your candidate, so the best training materials will come directly from your campaign. Create a guide and a video to walk users through MiniVAN. You can share these materials with your canvassers when you send a reminder email before your canvassing event.

CANVASSER GUIDE

Your guide should walk volunteers through the basics of using the MiniVAN app. It is best to customize it for your campaign and turf, but you don't have to start from scratch. [Here's a basic guide to get you started.](#)

Videos are an effective way to capture the attention of your volunteers. If possible, feature your candidate in the video. Their enthusiasm will motivate your volunteers to show up and bring their best attitudes to the doors.

Here are a couple of strong examples to get you started:

[Get Out the Vote: How to Canvass with MiniVAN](#)

[Justin Trudeau's Top 3 Volunteer Tips](#)

SET UP A TRAINING AREA IN YOUR STAGING LOCATION

Training your volunteers before a canvass is an opportunity to make sure that they are comfortable using MiniVAN and excited to hit the doors. A good training will boost volunteers' confidence, prepare them to hit the doors, and leave them excited about working with the campaign. Keep your training short, simple, and upbeat.

TRAINING PACKET

Print out screenshots of the app to help walk volunteers through each step of their canvass, from downloading the app to syncing their results. We encourage you to create these so that you can walk canvassers through your script(s). We've made it easy for you — you can [download this packet of screenshots](#) for you to post in your training area.

WHAT TO INCLUDE IN YOUR REMINDER EMAIL

The day before your canvass, send a reminder email with instructions on how to download and set up the MiniVAN app. In addition to thanking them for volunteering, you will also want to ask each volunteer to:

1. Download the MiniVAN Touch app in the [iOS Apple](#) or [Google Play Store](#)
2. Create an Action ID to log in
3. Bring a well-charged smartphone or tablet. Also, encourage them to bring a portable charger for their device to use in the field office or in their car.

SENDING YOUR CANVASSERS OUT ON THE DOORS

Once your canvassers have the app, all they need to do is enter the turf's list number and download the list. This will give them their turf and they can head out and get knocking. The list can also be sent directly to their phones to download.

They will be able to view the list in Household or Map view. Most users toggle between the two, using Map view to get oriented and Household view to view the voters at their addresses. Please note that Map view uses more battery than Household view does.

Selecting Find my Next Door will show canvassers the three closest un-canvassed houses on their list, helping canvassers quickly orient themselves.

If your canvasser prefers to canvass with a partner, have the two canvassers enter the same list number. When a canvasser syncs their data, their partner will be able to see which doors have already been knocked.

REFRESHER ON CREATING A CANVASS

If you're completely new to VAN, [check out our VANUAL](#). This is the best resource to help you get started with VAN, VoteBuilder, or SmartVAN.

If you're just looking for a refresher to help you create your next canvass, you've come to the right place. Here we review:

1. Creating a List (Choosing the Voters You'll Contact)
2. Creating Survey Questions (Creating Questions for Your Script)
3. Building a Script
4. Cutting Turf

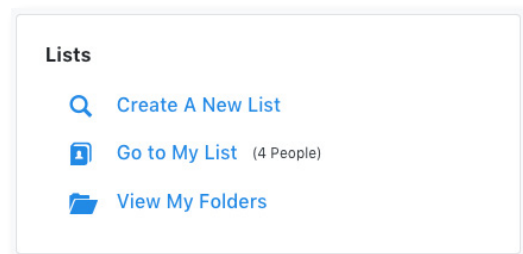
After you've created your list and built your script, you can go back to the start of this guide to create your MiniVAN Campaign.

CREATING A LIST

Creating a list of voters is the first step to running a canvass or phone bank. From the Lists tab on the homepage, you can navigate to either creating a new list, returning to a previous list, or accessing a list that has been saved into a folder.

SELECT CREATE A NEW LIST

Create a new list is found on the menu of both **My Voters** and **My Campaign**.



SELECT YOUR DESIRED SEARCH CRITERIA

From the Create A New Search page, you can search based on a wide variety of data point, such as location (under the **Addresses** tab, you can select to search by state, city, zip code, address, etc.), **Home District** (County, State or Congressional), demographic information, and profile characteristics such as having a listed phone number or email address. When pulling lists for canvassing or phone banking, several other important fields to keep in mind are **Canvass Status** and **Survey Questions**. These tools allow organizers to pull (or exclude) voters from lists based on their previous contact history - selecting only voters who have answered “yes” to a Survey Question, or excluding those who have already been called recently, for instance.

The screenshot displays the 'Create A New Search' interface. On the left, under 'OTHER SEARCH CRITERIA', there is a list of categories: Activist Codes, Addresses, Age • Registration Date, API Saved Lists, Canvass Status, Custom Contact Fields, and Early Voting. Each category has a right-pointing arrow and a star icon. On the right, a 'Step 1: New Search' panel shows selected criteria: 'Early Voting' (with 'exclude Voted Early' below it), 'Registration' (with 'Registration Status = Active or Inactive or Provisional' below it), and 'Suppressions' (with 'exclude Deceased and include Good Voting Address only and include Good Mailing Address only and include Do Not Email' below it). Below this list are buttons for 'New Search', 'Open', and 'Save'. At the bottom of the right panel, there is a '+ Add Step' button, a 'Run Search' button, and a notification box stating 'Running this search will clear your current list of 4 people.'

SELECTING MULTIPLE SEARCH TERMS

Many fields on the **Create A List Page** include the ability to select multiple options from the list. These fields can be identified because their names appear in blue text, rather than black (as seen above). To use this feature, rather than selecting the dropdown menu, click on the blue label to access the select multiple menu.

▼ Home Districts

Search for Districts that have been applied to a person's physical Home Address.

State **Select multiple** Florida

County

Congressional

State Senate

State House

TRACK YOUR LIST

As you choose qualities to search by, they will appear in the summary on the righthand side of the screen, allowing you to track the qualities that you are adding to the list.

RUN THE SEARCH

Clicking the **Preview My Results** button will show you a count of people on the list without fully running the search. The plus sign next to the number displayed expands the preview to show number of phones, doors, and mailboxes present on the list as well. When you are satisfied with the list you have pulled, the green **Run Search** button will process the query and return your results.

← Step 1: New Search

Early Voting
exclude **Voted Early**

Phones
Phone Types = **Cell** or **Home** or **Main** or **Work**
and include **Likely Cell Phone Exchanges**

Districts
County = **Okeechobee**

Registration
Registration Status = **Active** or **Inactive** or **Provisional**

Suppressions
exclude **Deceased**
and include **Good Voting Address** only
and include **Good Mailing Address** only
and include **Do Not Email** [...less](#)

🔍 Preview My Results

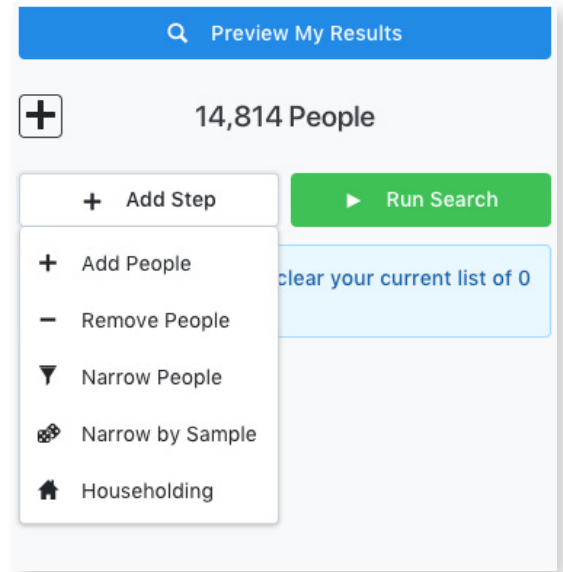
+ 14,814 People

+ Add Step **▶ Run Search**

Running this search will clear your current list of 0 people.

EDIT THE SEARCH, IF NECESSARY.

In addition to adjusting the search terms of the list, organizers can further edit the query by using the **Add Step** button. The **Add Step** button uses the previously pulled list as a starting point and performs new commands to add or remove voters from it based on a new set of criteria. Hovering your cursor over each option will reveal details on what actions will be performed by each command.



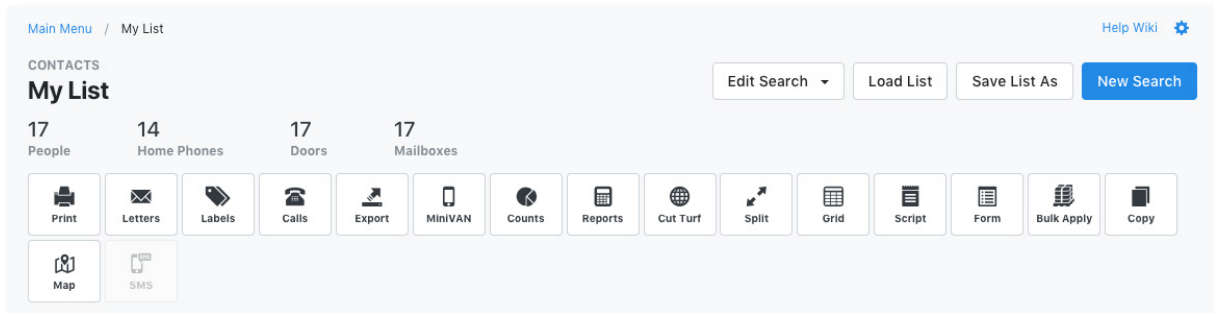
VIEW THE LIST

Once VAN has run the search, the **My List** page will display a summary of the list, a row of icons with various options for using the list, and a sample of the list to allow you to spot check the data.

The screenshot shows the "My List" page in a web application. At the top, there is a navigation bar with "Main Menu / My List" on the left and "Help Wiki" with a gear icon on the right. Below the navigation bar, there is a section for "CONTACTS My List" with a search bar and buttons for "Edit Search", "Load List", "Save List As", and "New Search". The summary shows 14,814 People, 14,538 Home Phones, 9,089 Doors, and 9,413 Mailboxes. Below the summary is a row of icons for various actions: Print, Letters, Labels, Calls, Export, MiniVAN, Counts, Reports, Cut Turf, Split, Grid, Script, Form, Bulk Apply, Copy, and SMS. A "Description" section is visible, with input fields for "Last Name" and "First Name". A red warning message states: "Below is a sample because your list is too large to display." Below the warning is a table of contact information with columns for Name, Address, City, Phone, Age, and Work Phone. The table contains 10 rows of data.

Name	Address	City	Phone	Age	Work Phone
Achey, Thomas E	5283 NW 20th St	Okeechobee	(555) 740-4449	87	
Amos, Barbara H	420 NW 9th St Apt 13	Okeechobee	(214) 978-2583	40	
Beck, Wilma K	9100 State Road 78 W	Okeechobee	(555) 762-1185	69	
Boss, Robert H	14627 NW 34th Ter	Okeechobee	(555) 370-4175	82	
Brown, Carol A	3499 NW 1st St	Okeechobee	(555) 779-3663	56	
Carter, Alvin G	110 NW 366th Trl	Okeechobee	(555) 297-9408	67	
Clausen, Phyllis A	690 NE 78th Way	Okeechobee	(555) 311-9175	80	
Cordero, Warren E	470 SW 87th Ter	Okeechobee	(555) 292-2360	78	
Cornilsen, Noe S	3725 SW 21st St	Okeechobee	(555) 890-6057	49	
Crowley, Cali A	12913 SE 46th St	Okeechobee	(555) 433-7885	27	
Cudworth, Ronald G	2161 NW 38th Ave	Okeechobee	(555) 841-2113	67	

The icons at the top of the screen of the **My List** folder demonstrate the most common actions that organizers will use lists for: Mailing (Letters, Labels), Phone Banking (Print, Calls), Canvassing (MiniVAN, Cut Turf, Map), Data Entry (Grid, Script, Form, Bulk Apply), and moving data to other sources (Export). Hovering your cursor over an icon will reveal more information about each action. To rearrange the icons, simply drag and drop them to move your most commonly used to the front.



SAVING + SHARING LISTS

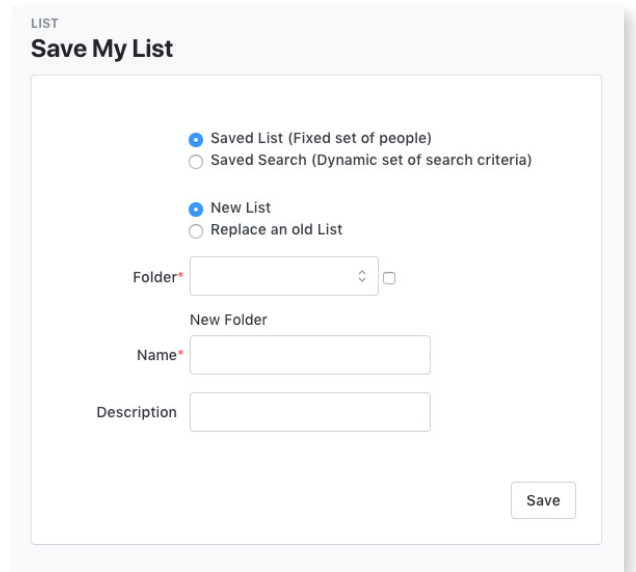
SAVING LISTS

SELECT SAVE LIST AS

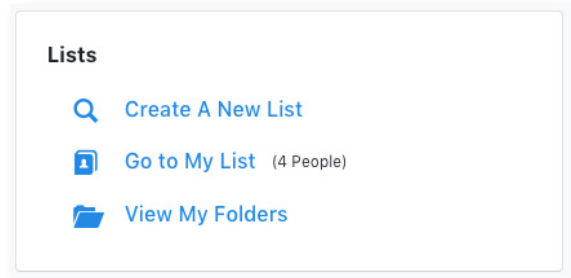
from the top-right corner of the **My List** page. VAN allows the option to save a list either as a fixed set of people, or as a dynamic search (the latter means your criteria is saved, and can be updated as voter profile information changes).

CREATE A FOLDER TO HOUSE THE LIST

Lists can be saved into existing folders, or a new folder can be created from this screen. These folders can always be accessed from the **Lists** window of the **Main Menu**.



The screenshot shows a dialog box titled "LIST Save My List". It contains two radio button options: "Saved List (Fixed set of people)" which is selected, and "Saved Search (Dynamic set of search criteria)". Below these are two more radio button options: "New List" (selected) and "Replace an old List". There are three input fields: "Folder*" with a dropdown arrow, "New Folder Name*" with a text box, and "Description" with a text box. A "Save" button is located in the bottom right corner.



The screenshot shows a menu titled "Lists" with three items: "Create A New List" with a magnifying glass icon, "Go to My List (4 People)" with a person icon, and "View My Folders" with a folder icon.

SHARING LISTS

VAN allows users to share lists with each other, so that, for instance, turfs created by one organizer can be viewed and printed by another. To adjust a list's sharing settings:

VIEW THE FOLDER

From the **Main Menu**, select **View My Folders** in the **Lists** panel. Open the desired folder and click the **Edit Folder** button.

ADD USER ACCESS

From the **Edit Folder** page, access to the folder can be granted to or removed from other user accounts in the VAN. Simply select the user(s) who need access, and add them to the appropriate column.

FOLDERS
Edit Folder Gabby's Demo Turfs

Name*

Allow other users to save into this folder

Allow the API to save into this folder

Description

Created By Weiss, Gabrielle (1/17/18)

Status Active Inactive

User Access

Committee

Users with Access

Users without Access

- 1, NOU
- ApiUser, SLDemo
- auto, tester
- autotest, tester
- Hu, Yuan
- hu, Yuan
- Hu, Yuan
- Ogin, Todd
- Stephenson, Michelle
- Test, Eric

SURVEY QUESTIONS + ACTIVIST CODES

Survey Questions and Activist Codes are a critical part of voter contact, enabling organizers to store and utilize information collected about voters. Both can be found on the Administrative Menu panel of the Main Menu. The process for creating both Survey Questions and Activist Codes is very similar, so this guide will focus on creating Survey Questions, since they are slightly more complicated.

SELECT

Survey Questions OR Activist Codes FROM THE Codes-Questions-Scripts dropdown From this screen, you can view and edit existing Survey Questions and Activist Codes

SELECT

Create New Survey Question OR Create New Activist Code FROM THE TOP-RIGHT CORNER OF THE SCREEN

Cycle* 2018
Type* Candidate
Long Name* Demo Candidate ID
Medium Name* Demo ID
Short Name* ID
Question* Can we count on your vote for Demo Candidate in the upcoming election?

ENTER QUESTION/CODE TEXT AND NAME DETAILS

Once you have filled in the text and details, click the “save” button. For Activist Codes, this is all you need to do.

FOR SURVEY QUESTIONS: ENTER RESPONSES

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	Resp Medium	Resp Short	Master Response
1 - Strongly Support	1	1	<input checked="" type="checkbox"/> Edit Delete
2 - Lean Support	2	2	<input type="checkbox"/> <input checked="" type="checkbox"/> Edit Delete
3 - Undecided	3	3	<input type="checkbox"/> Edit Delete
4 - Lean Otl	<input type="text" value="4"/>	<input type="text" value="4"/>	<input type="text" value=""/> Add

BUILDING 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.

TYPE TEXT ELEMENTS

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 **Linear Script Preview Panel**.

INSERT DYNAMIC SCRIPT ELEMENTS

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.

EDIT OR ADJUST AS NECESSARY

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.

CHOOSE CANVASS RESULT OPTIONS

Before saving, make sure to review the Canvass Result options on the righthand 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.

The image shows two panels from a script-building interface. The top panel, titled "Linear Script Preview", displays a list of three script elements. Element 1 is a text element: "Hi, is [voter name] available?". Element 2 is another text element: "My name is [name], and I'm calling with a demo campaign.". Element 3 is a survey question: "Do you believe that the treatment of animals on farms and in factories is acceptable?". Below the question are four radio button options: "Yes", "No", "Unsure", and "Don't Care". Each element has "Delete" and "Edit" buttons to its right. A "Save" button is at the bottom of the preview panel. The bottom panel, titled "Add Script Element", contains four input fields with "Add" buttons: "Text", "Survey Question", "Activist Code", and "Volunteer Activity". At the bottom of this panel is an "Event" field with an "Add" button and the text "Select Date, Event, Role, and Location".

CUTTING TURF

*FROM THE **MY LIST PAGE**, SELECT **CUT TURF***

A map will populate, with black dots representing each voter record on your list.

CLICK THE SCREEN TO DROP PINS

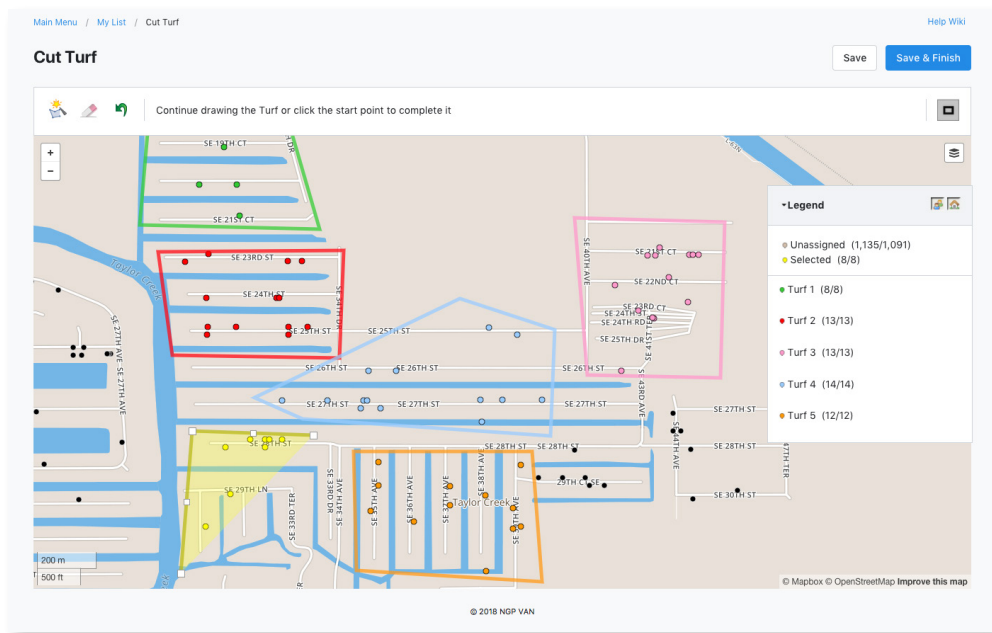
To begin cutting the turf, click on the screen to drop a pin where you want to begin a turf. Click on the screen again to drop a second pin, creating a turf boundary between the two points, and continue dropping pins until you are happy with the turf size. As shown on the yellow turf below, doors that are included in a turf will be highlighted, and the **Selected** section of the Legend shows a count of the doors that will update as you select.

CUT ADDITIONAL TURFS

To close the turf, simply click on the first pin again. Your turf will be displayed on the color-coded legend, and can be edited at any time by clicking on it and dragging the pins. Repeat the process for as many turfs as you need.

ERASE OR UNDO IF NEEDED

The icons at the top of the screen are options to automatically cut turf, based on preference such as door count, undo last action, or erase all turfs.



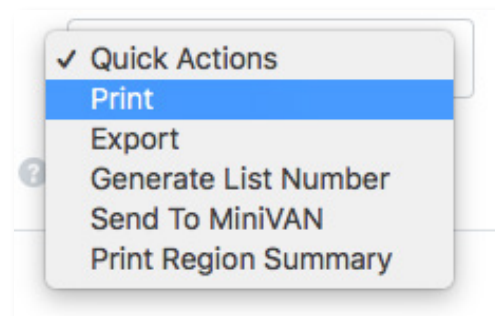
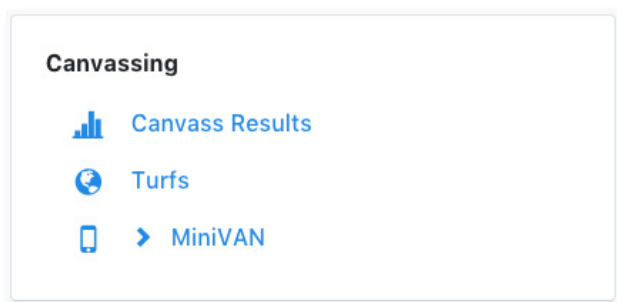
SAVE THE TURF

When satisfied with the turfs, hit **Save and Finish**. You will be prompted to select a destination folder, or create a new folder to house the turf.

PRINT THE TURF

Saved turf can be accessed by selecting the **Turfs** option the **Canvassing** panel of the **Main Menu**.

From the **Turfs** screen, select the desired turf or turfs (organizers can select multiple regions to print at once) and choose **Print** from the **Quick Actions** dropdown menu. This menu also houses options to export, send to MiniVAN, or generate list numbers.



CHOOSE PRINT SETTINGS

The print settings screen will prompt organizers to select the script that will be used for the canvass, choose the order that records will displayed, and other settings for printing the map and list.

Main Menu / My Turfs / Print Turf Packets

DATA ENTRY

Print 3 Turf Packets

Map Region 1 of 1 (Demo Turfs)

Report Format* [Preview](#)

Script

Contacted How*

Title

MiniVAN Campaign

Sort Order1 Asc Desc
 Show Group Header Page Breaks

Sort Order2 Asc Desc
 Show Group Header Page Breaks

Sort Order3 Asc Desc
 Show Group Header Page Breaks

DOWNLOAD AND PRINT PDF

Once you have chosen settings and hit **Print**, you can access the PDF files through the **Message Center** on the **Main Menu**. Simply download the file, print from your computer, and it is ready to be assembled onto clipboards!

PDF Printing Instructions

<input type="checkbox"/>	Title	Type	Created	Created By	File Size	Download Link	Delete
<input type="checkbox"/>	Demo Turfs	Map Region	2/5/18 11:14 AM	Weiss, Gabrielle	292 KB	Download File	Delete

1 PDF Print Job · 1 Page

Now that you've refreshed your memory on creating a canvass, you're ready to set up your MiniVAN Campaign! **Hop back to the start of this guide to get going!**



MINIVAN MANAGER

*ACCOUNTABLE.
ADAPTABLE.
EFFICIENT.*

Keep your finger on the pulse and stay in control of your canvassing operation. Get instant information about your canvassing team's progress and activities.

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