The Official

MiniVANual

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

ngpvan

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CH Carl Henderson

JW Jennifer Willis   4:20PM ✕

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?

MiniVAN is our mobile canvassing application, which can be used to replace traditional list printing, data entry, and even turf cutting for canvassing. We built MiniVAN to help campaigns run more efficient canvasses and to improve the experience for canvassers (we're pretty excited to help campaigns use less paper, too).

Campaigns are always short on time. MiniVAN speeds things up. 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.

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.

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 all houses, ordered by distance. With the closest houses at the top of the list, canvassers can quickly orient themselves. In
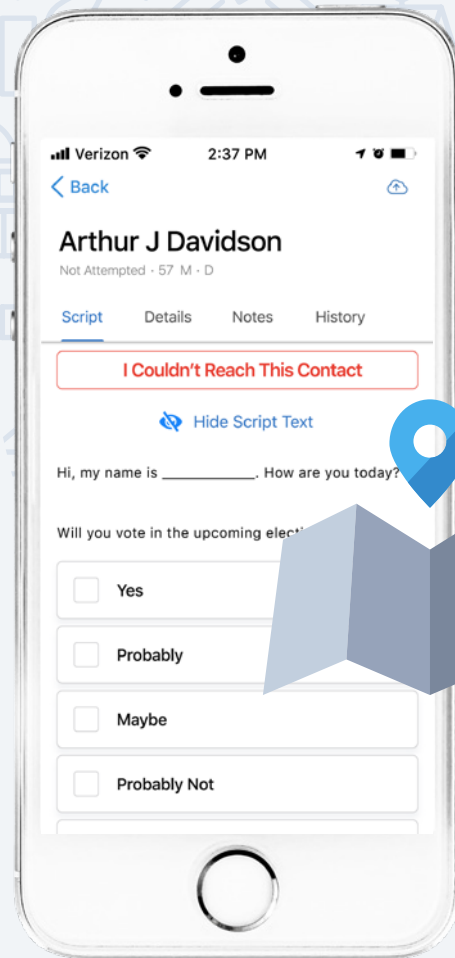
addition, the Optimized Routing add-on provides canvassers with the most efficient route, including turn-by-turn directions.

Replacing walk packets 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? Our core MiniVAN features are free to campaigns that are already using our organizing tools. Whether you have ten volunteers or a hundred, they can download the app and start hitting the doors today.

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 because canvassers can create their own ActionID right from the app. Canvassers can reuse their ActionID for every canvass (and can use it for other tools like OpenVPB!).

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 Touch app in the ios App Store or Google Play Store. After they create an ActionID for themselves, have them enter the list number from a turf packet.

This will send all the script, list, and other details of that walk packet directly to 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	

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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. Don't offer them the option to continue using paper walk packets.

2 Partner New Canvassers with Experienced Canvassers

If you're able to, share your own stories about good experiences with MiniVAN, and pair newer or less tech-saavy volunteers with more seasoned pros who can show them the ropes. Most people are comfortable with smartphones at this point in time, but smoothing a path for new volunteer onboarding can help build trust and validate new tools!

3 Invest in a Few Tablets

This transition will greatly reduce the amount of paper and ink your campaign goes through, saving you money on printers, toner, and paper. We recommend re-investing some of 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.

4 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 Your Canvassers to Use MiniVAN

TRAINING MATERIALS

Good training materials will help your canvassers hit the ground running. Your volunteers are showing up to support you and your candidate so the best training materials will come directly from your campaign, so consider creating a guide or video to walk users through MiniVAN.

Your guide should walk volunteers through the basics of using the MiniVAN app. 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   **MiniVAN Tutorial**

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.

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 get started with 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 Apple or Play Store

2 Create an ActionID to log-in

3 Bring a well-charged smartphone or tablet. Also, encourage them to bring a charger for their device to use in the field office or in their car.

4 If you've used MiniVAN before, make sure that the app is up to date. The app is being updated and improved every cycle.

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, if you want to pre-assign their turf.

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, and we'll alert users to switch to *Household* view if their battery is running low.

Selecting *Find My Next Door* will show canvassers all houses, ordered by distance. With the closest houses at the top of the list, canvassers can quickly get started on the most efficient route through their turf.
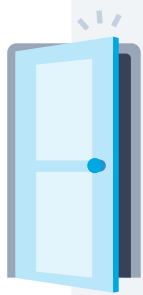

Pro-Tip: *Team Canvassing*

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. This feature is especially helpful during GOTV, or if you have canvassers working the same lists for multiple days. The most recent knock attempt will appear for that list number for 7 days, or until the turf is refreshed.
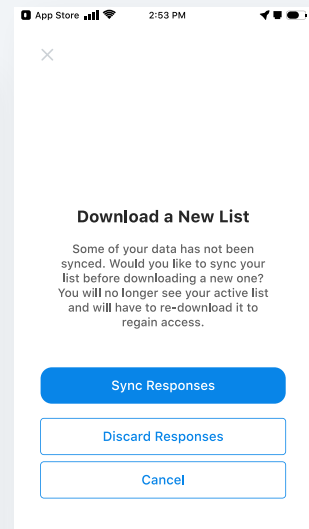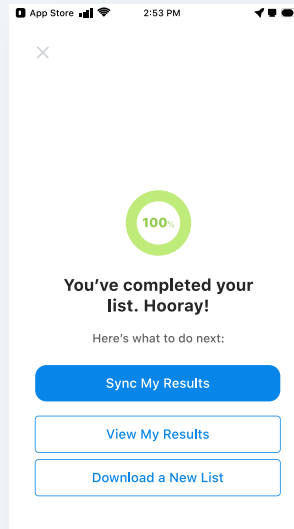
NOTIFICATIONS

Pop-up notifications in MiniVAN help and encourage canvassers as they make their way through their lists. These notifications will make it easier to operate the app and will help the canvasser stay motivated along the way.

Notifications will appear after canvassers successfully canvasses their first home and at the 25%, 50%, and 75% progress marks.
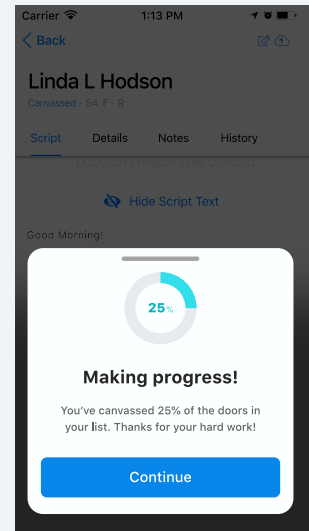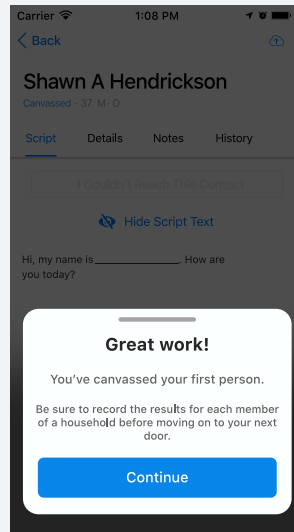
When canvassers complete their list, they'll be encouraged to sync their results and download a new list.

When a voter is not home, canvassers can quickly mark them as *Not Home* or *NH* in the app. A pop-up notification will provide a friendly reminder about the quick-mark shortcut, making each canvass even more efficient and saving multiple clicks for the canvasser.

Canvassers will also receive a notification if there aren't doors available for a distributed canvass or if the battery on their device is getting low.

Create Your **MiniVAN** Campaign

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

Administrative Menu

> Reports • Forms • Labels
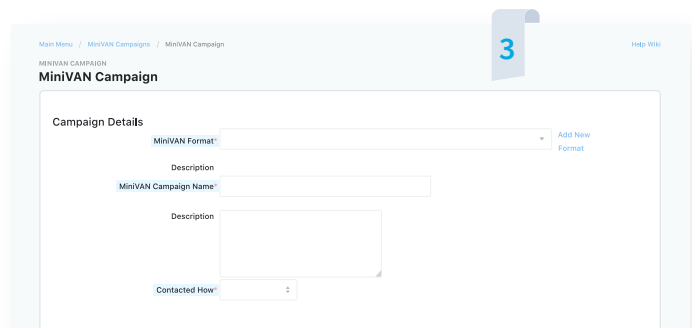
⌄ MiniVAN

MiniVAN Formats
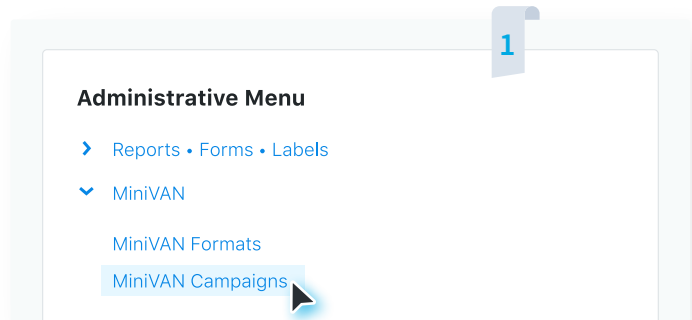
MiniVAN Campaigns

2 From the MiniVAN Campaign List, select **Add New MiniVAN Campaign** on the upper right-hand side.
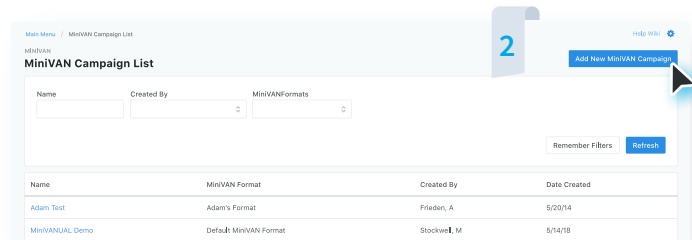
3 Under *Campaign Details* on the MiniVAN Campaign page, select your **MiniVAN Format**. The Default MiniVAN Format will work well for most canvasses.

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:

Script Details

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

Script* [2016 Demo ID Script – not branched   ⇕]   Add New
Script

○ Choose a Script for everyone in the List

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.

○ Choose a Default Script and up to 4 Alternative Scripts

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.

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

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.

1 To get started, select **Scripts** from the ADMIN section of the Main Menu.
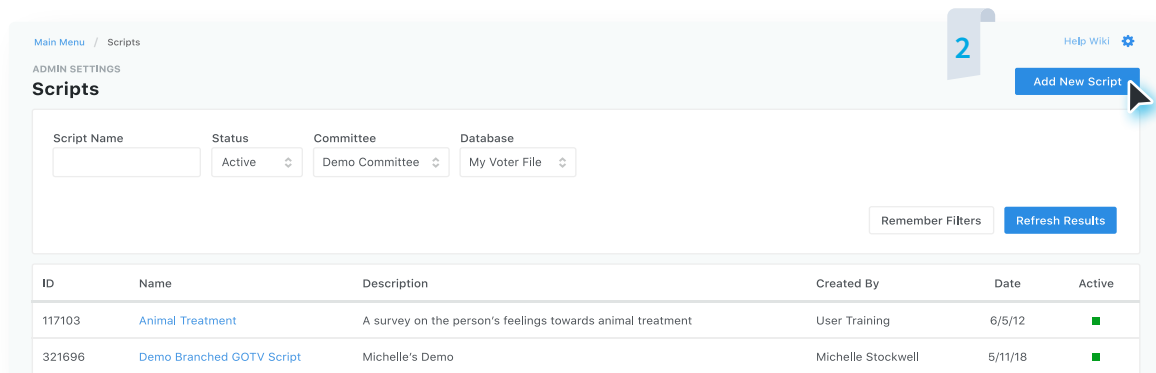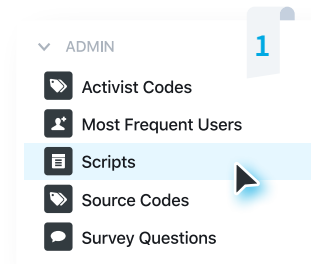
2 On the upper right-hand side of the *Scripts* page, select **Add New Script**.

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

Script Type

Script Type ○ ☰ Linear
Linear scripts offer the standard script format of stacked elements with no conditional statements.

◉ ⅛ Branched
Branched scripts are reserved for MiniVAN use only. Create multiple script paths for your canvassers.

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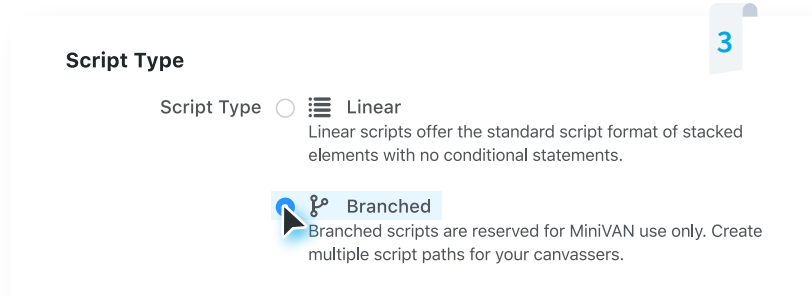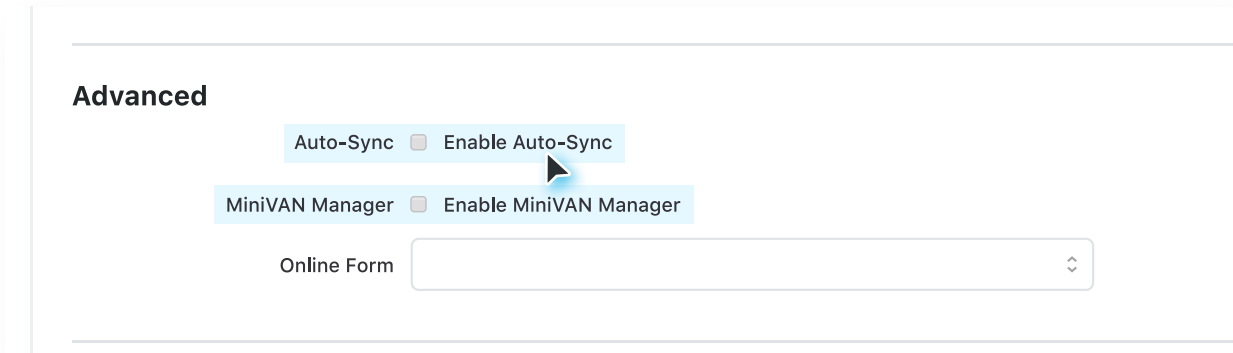
Using *Text Boxes*, *Survey Questions*, and *Activist Codes*, you can begin to build out a survey. To keep canvassers moving through the script, it is important that each response is linked to its next step.

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.	⅛ ⇕ **2**	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 ⅛ ⇕ **3**

Unsure ⅛ ⇕ **6**

No ⅛ ⇕ End

No Response ⅛ ⇕ End
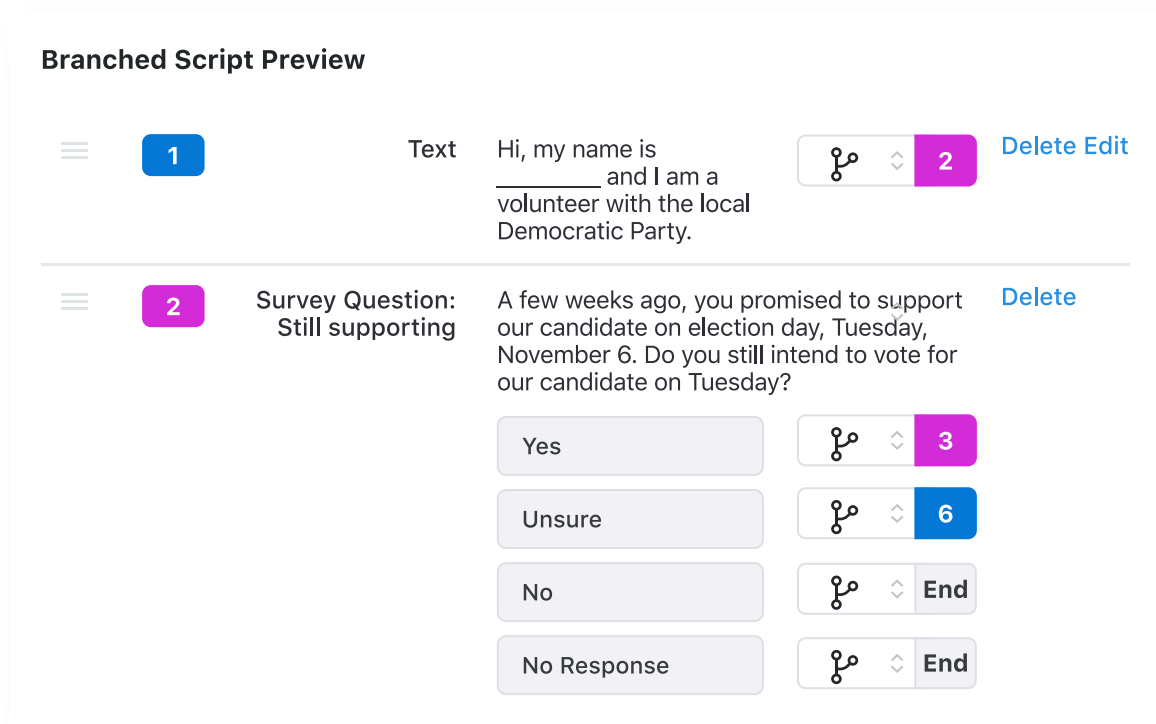
ADVANCED SETTINGS

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.

Pro-Tip: *Collecting Sign Ups and Donations*

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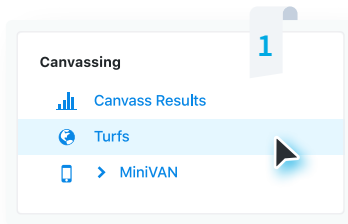
1 From the *Canvassing* section of the Main Menu, select **Turfs**.

2 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 right-hand side, click on the **Quick Actions** dropdown menu.

Turf	Folder	People	Doors	Last Out/Distributed	MiniVAN Status	Progress	
∨ Baker County	Baker County	1,949	987				∨
Baker County Turf 01	Baker County	259	147	23890583-21872 Generated: 5/1/18 3:16 PM	1	0%	∨
Baker County Turf 02	Baker County	101	54	23890584-66424 Generated: 5/1/18 3:16 PM	1	0%	∨
Baker County Turf 03	Baker County	75	41	23890585-18294 Generated: 5/1/18 3:16 PM	1	13%	∨
Baker County Turf 04	Baker County	85	52	23890586-14867 Generated: 5/1/18 3:16 PM	0	0%	∨
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.

PRINTING YOUR TURF

If you'd like to print the entire turf packet, select **Print**. We recommend selecting **Print for MiniVAN** 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 right-hand 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.

Commit and Review Results

COMMIT YOUR MINIVAN DATA

After people are done canvassing, select **Go to Commit Page** on the upper right-hand side of the screen.
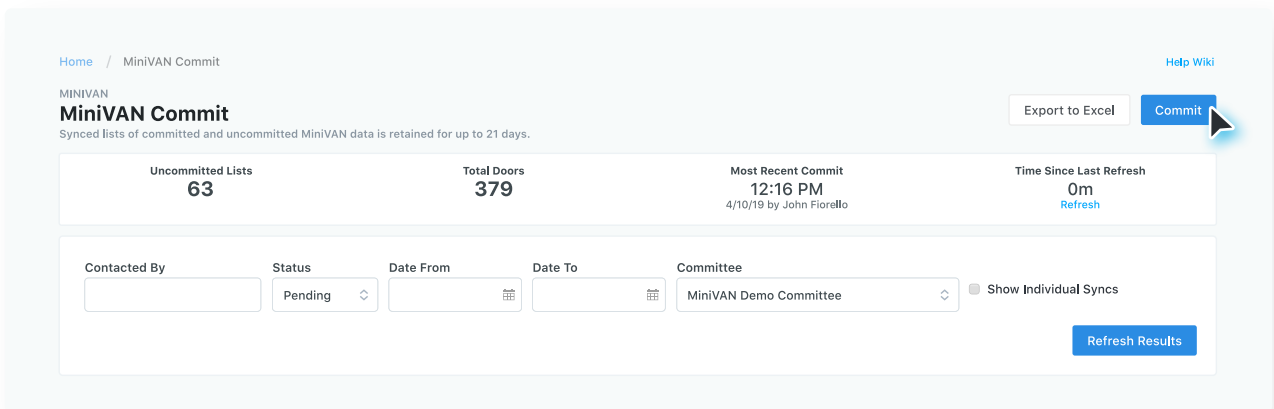
On the Commit Page, you will see the canvass results broken down by canvasser. You can also click the on numbers listed under Attempts to see a breakdown of the individual responses on the doors.

When you're ready to commit the data, select the checkbox next to List Name and select the **Commit** button on the upper right-hand 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 right-hand 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.

You can get a full overview of voter contact with the Contact History Report, which displays your committee's contact history from the past 14 days. From the Report Manager, select the **Contact History Report**.

From the drop-down menu under the Report Summary, you can filter the results with filters including Campaign, Contact Type, and Canvassed By.

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.

BEST PRACTICES: CREATING YOUR DISTRIBUTED CANVASS

Think About Scale

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. To control this, you can customize the ruleset for how many miles away the contacts can be from a canvasser.

Include Enough Doors
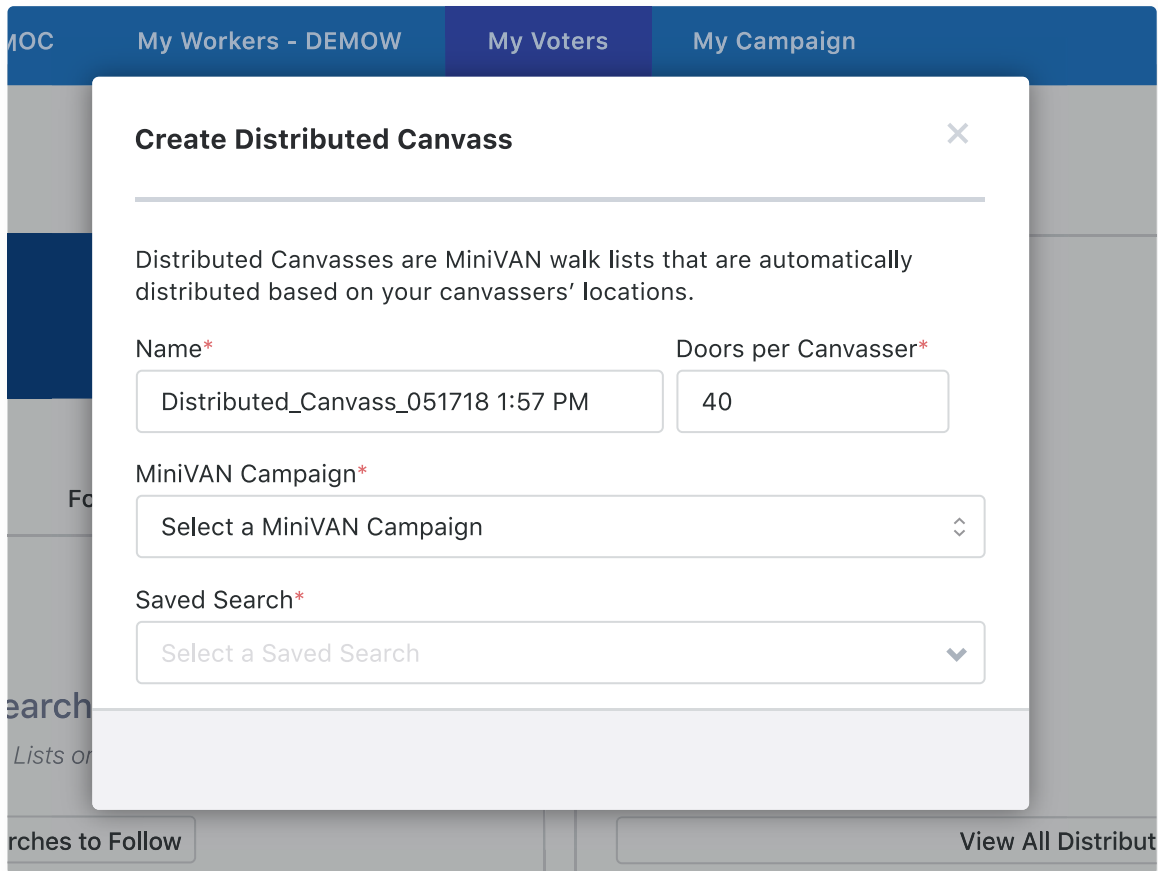
Make sure the number of doors in your distributed canvass matches your level of volunteer availability and engagement. It's important to have enough doors for everyone participating.

SETTING UP DISTRIBUTED CANVASSING

1   From the Organizer Dashboard, select **Create New**.

Last updated 7 minutes ago

Distributed Canvasses

No Distributed Canvasses Yet

Create new walk lists that are automatically distributed based on your canvassers' locations.

Create New

My Phone Banks

My Virtual Phone Bank Stats   Last 30 Days

0   0.0%   0 Days

2   In the *Create 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.


Under Advanced features, you can adjust the canvass radius and the number of days that a list can stay checked out to an individual canvasser.

3   Next, you'll see a list number than 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.
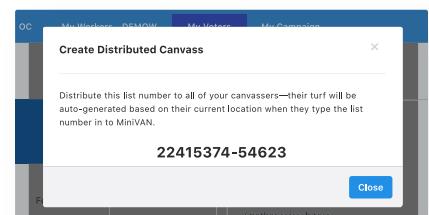
Each canvasser will get a unique list of doors and once a door has been assigned to a canvasser, it can't be checked out by another canvasser for a set period of time. That list is checked out to them until the voters are checked back into the Distributed Canvassing universe or the days checked out has passed. You can customize the ruleset for the number of days that a list can stay checked out on a device.
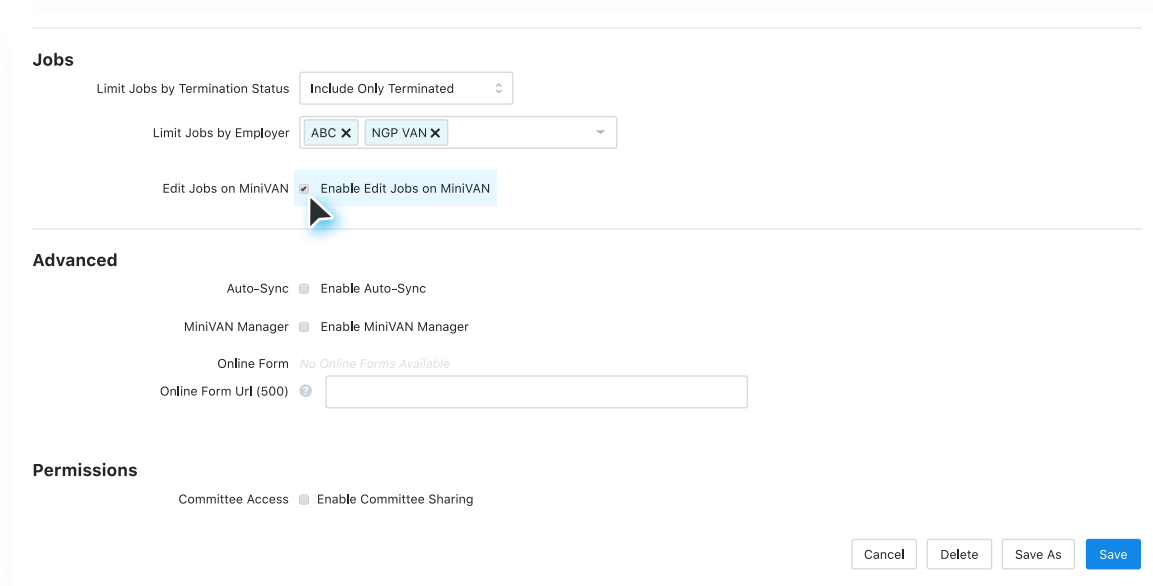
After the canvass, you will be able to see a full Distributed Canvassing report.

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.

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.
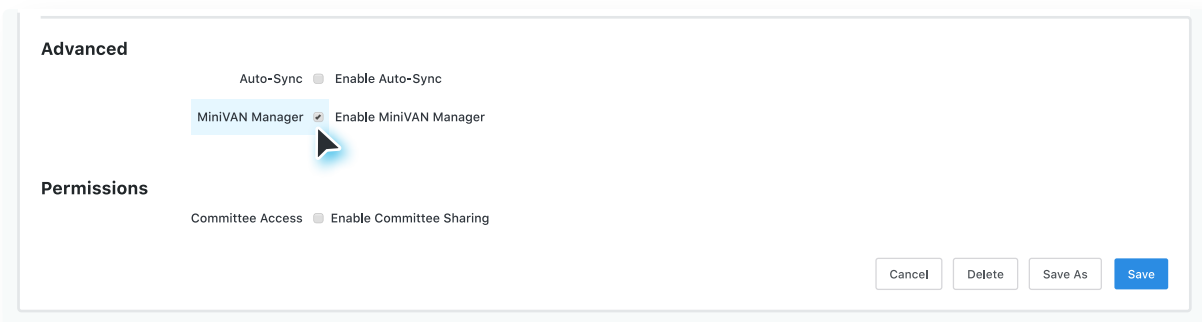
MiniVAN Manager

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 left-hand 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.


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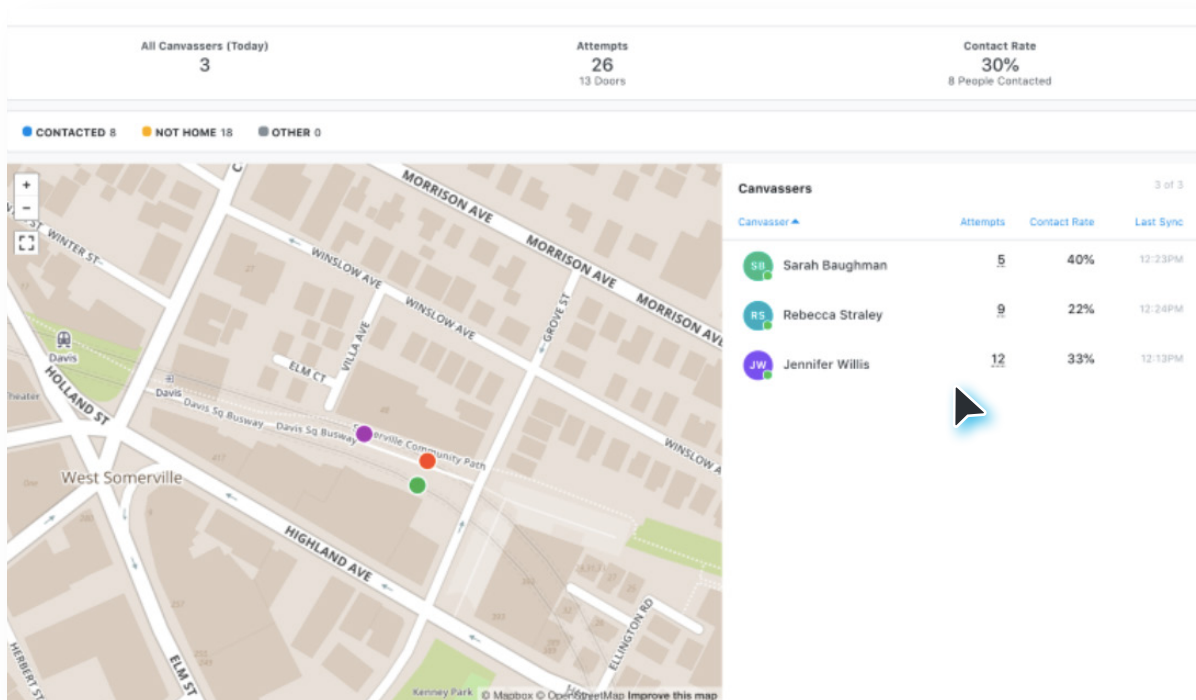
By selecting a canvasser's dot directly, you'll be able to see the progress that they've made on the doors. As you adjust the view of the map, the list will automatically filter to display only the canvassers within your map view.

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.

Filters

MiniVAN Campaign

Team

Division

Canvasser Status

✓

Active
Downloaded List
Inactive

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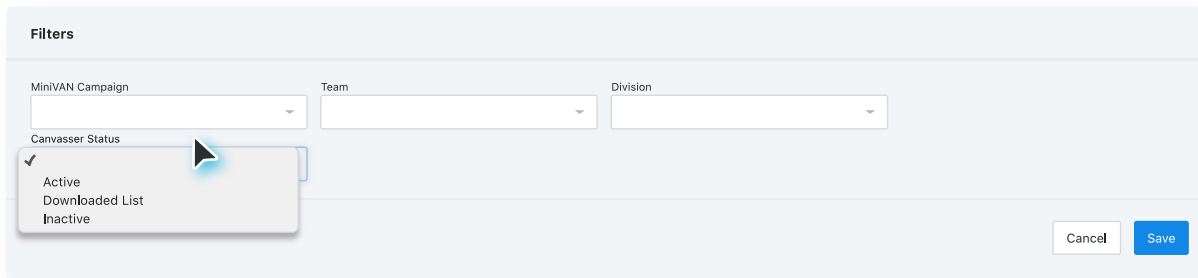
You can also re-sort the list of canvassers by Doors, Contact, downloaded list (DL List), and their Last Sync.

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

Optimized Routing

Optimized routing is an add-on tool that creates an optimized walk route for the canvasser. Once the canvasser enters their start and end point and chooses walking or driving directions, their canvass list will be reordered based on the most efficient route between their start and end point. Canvassers are also provided with turn-by-turn walking or driving directions, making it easier to complete the entire packet efficiently.
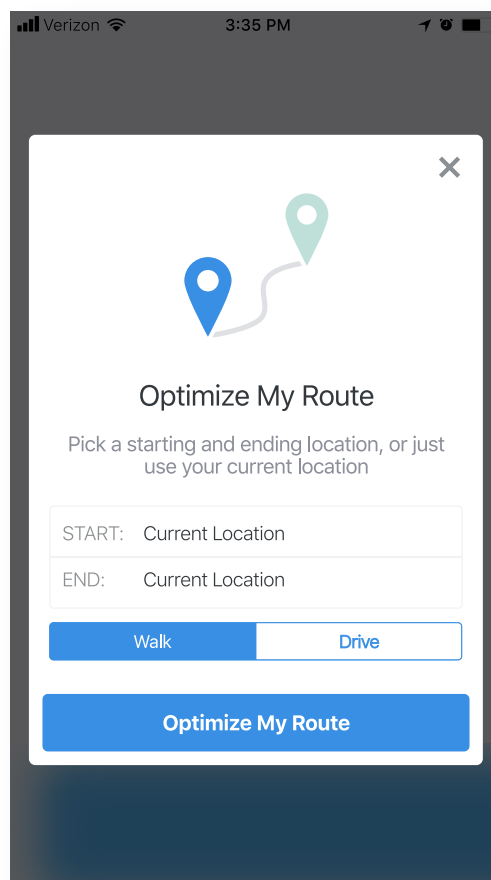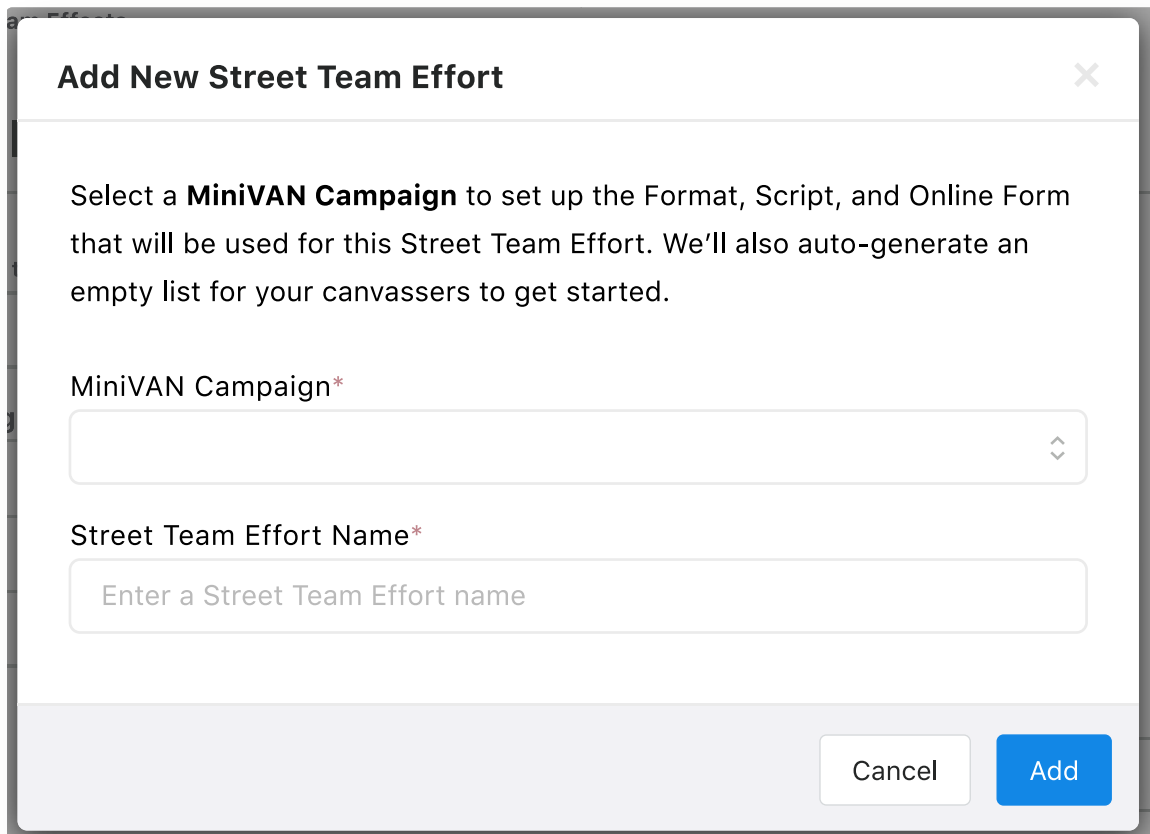
Optimized routing can be enabled for lists with up to 148 doors or locations, although that number could vary based on the number of apartments on the list.

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.
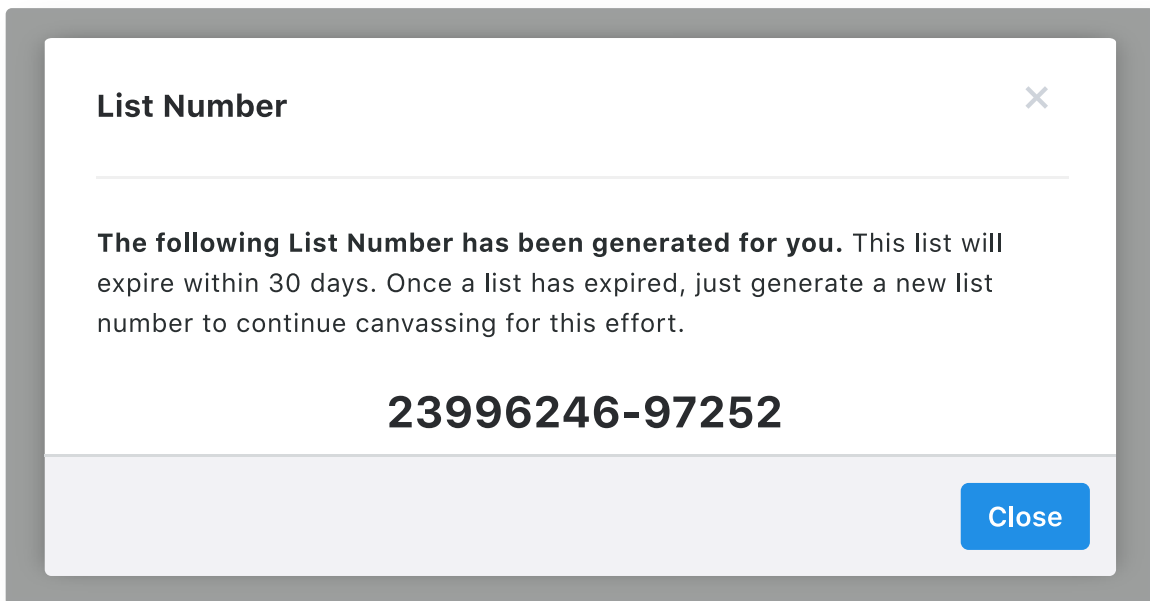
STREET TEAM EFFORTS

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

2   Select **Add New Street Team Effort** on the upper right-hand side of the page.

3   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.

Add New Street Team Effort   ✕

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.

MiniVAN Campaign*

[⌄]

Street Team Effort Name*

[Enter a Street Team Effort name   ]

Cancel   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.

List Number ✕

The following List Number has been generated for you. This list will expire within 30 days. Once a list has expired, just generate a new list number to continue canvassing for this effort.

23996246-97252

Close

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

MiniVAN Contributions

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 Checkboxes 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 CONTRIBUTIONS 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.
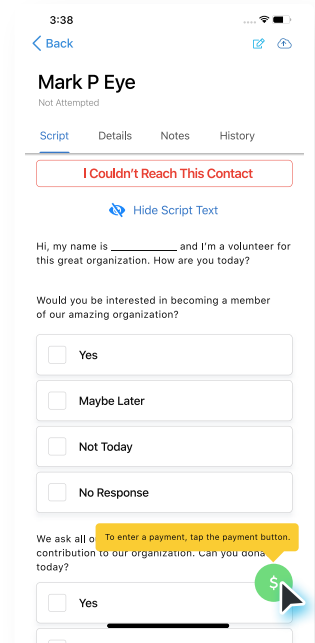
Refresher on Creating a Canvass

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 Build 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. 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 Campaigns*

Lists

🔍 Create a New List

📁 Go to My List (4 People)

👤 View My Folders

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.
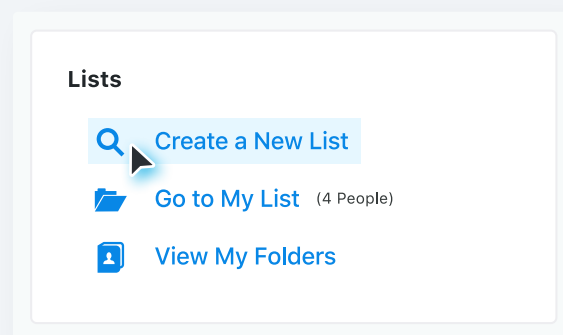
When pulling lists for canvassing or phone banking, several other important fields to keep in mind are **Canvass Status** and **Survey Questions**. These tools allow organizers to pull (or exclude) voters from lists based on their previous contact history—selecting only voters who have answered "yes" to a Survey Question or excluding those who have already been called recently, for instance.
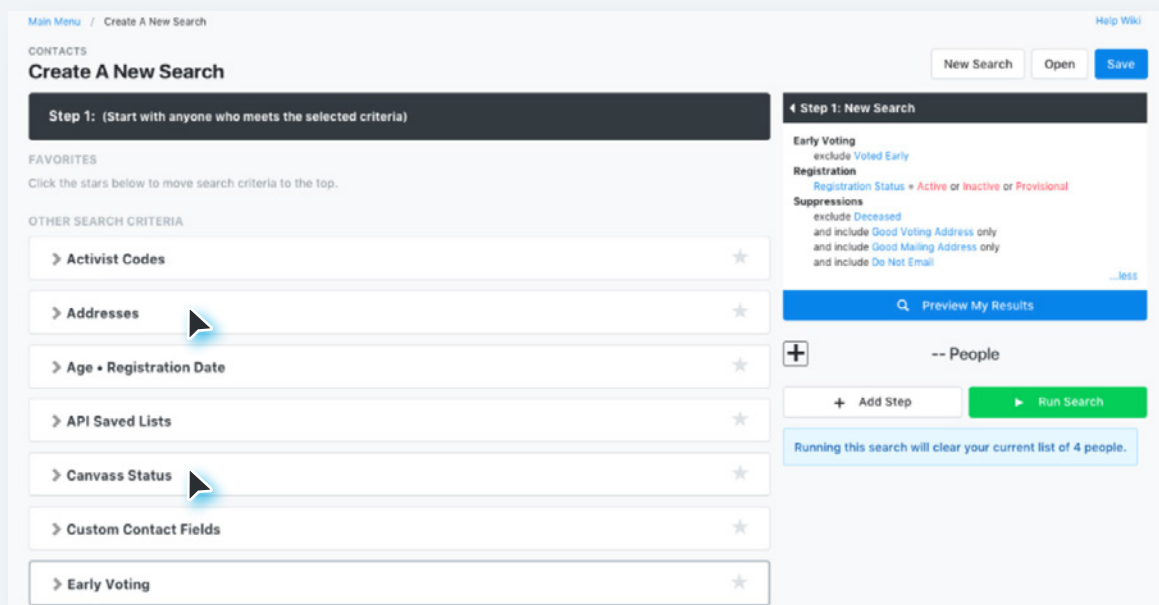

Selecting Multiple Search Terms
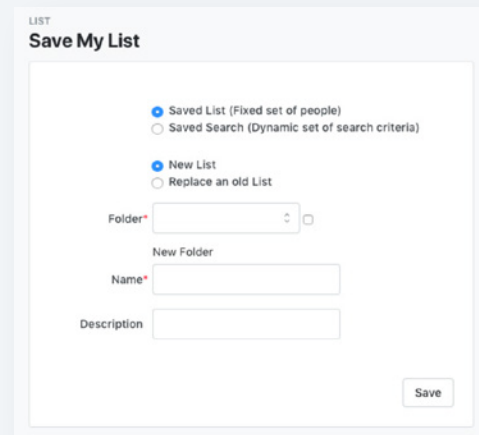
Many fields on the *Create A List* page include the ability to select multiple options from the list. These fields can be identified because their names appear in blue text, rather than black (as seen above). To use this feature, rather than selecting the dropdown menu, click on the blue label to access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

Track Your List

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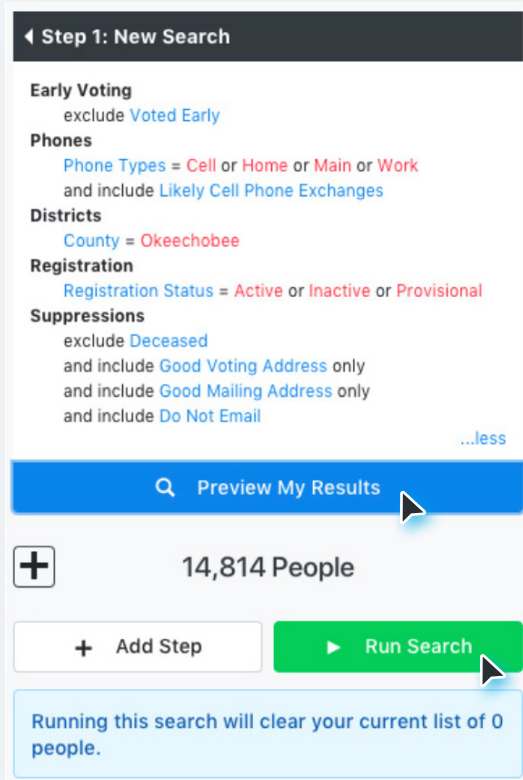
Run the Search

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 the 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.
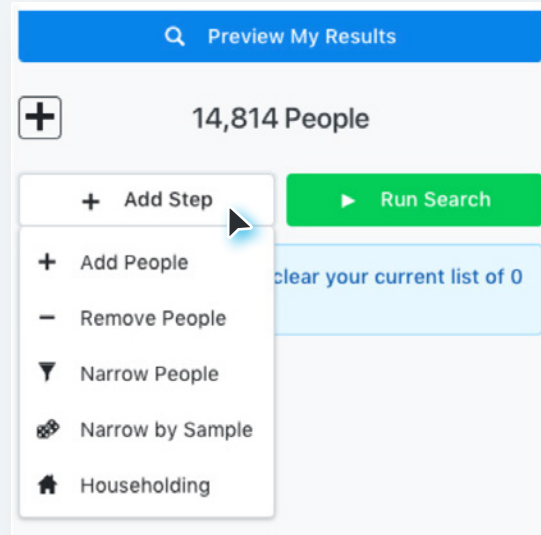
Edit the Search, If Necessary

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 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

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 options.

Saving Lists

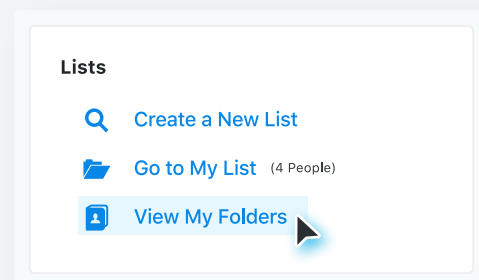> Select **Save List As** from the top-right corner of the *My List* page.

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).

LIST
Save My List

- ⦿ Saved List (Fixed set of people)
- ◯ Saved Search (Dynamic set of search criteria)

- ⦿ New List
- ◯ Replace an old List

Folder* [   ] ☐

New Folder

Name* [   ]

Description [   ]

[Save]

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 section of the Main Menu.

Lists

🔍 **Create a New List**

📁 **Go to My List** (4 People)

👤 **View My Folders**

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* section. 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.

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

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.

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 dropdown 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 Results Options

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.

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 the 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.
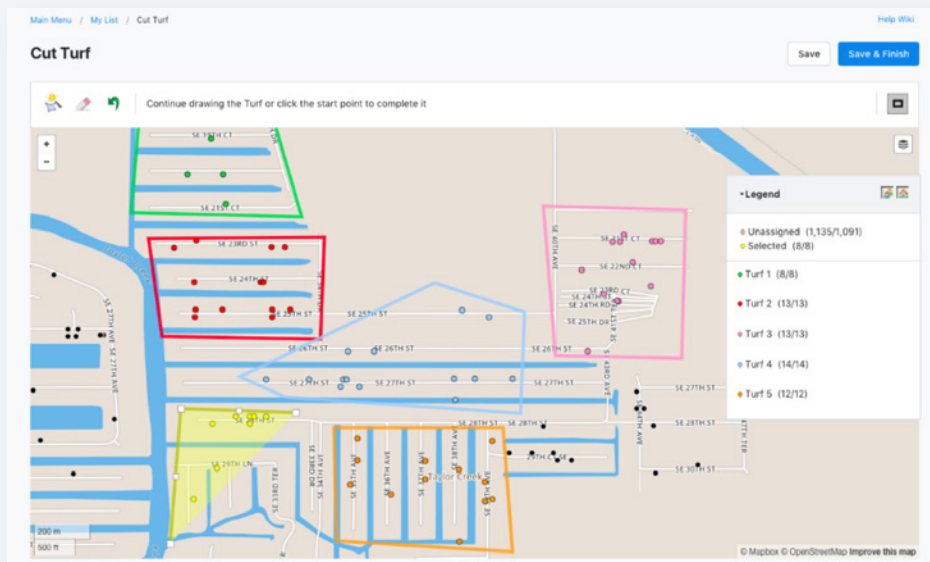
Save the Turf

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 section 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.
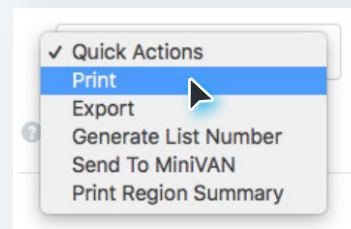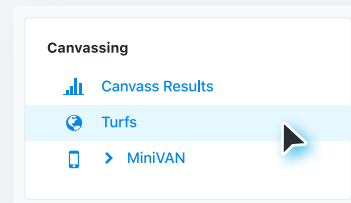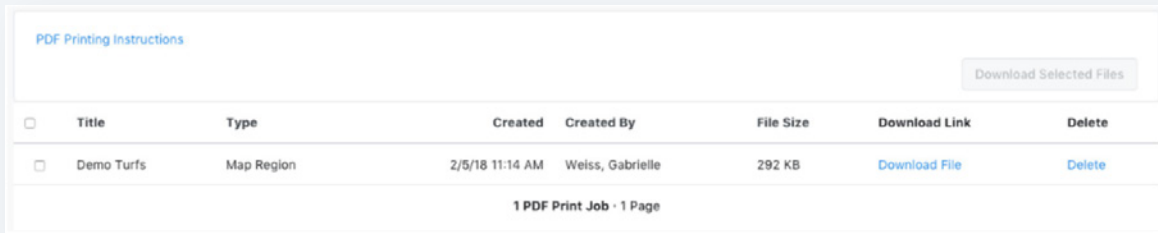
Choose Print Settings

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!
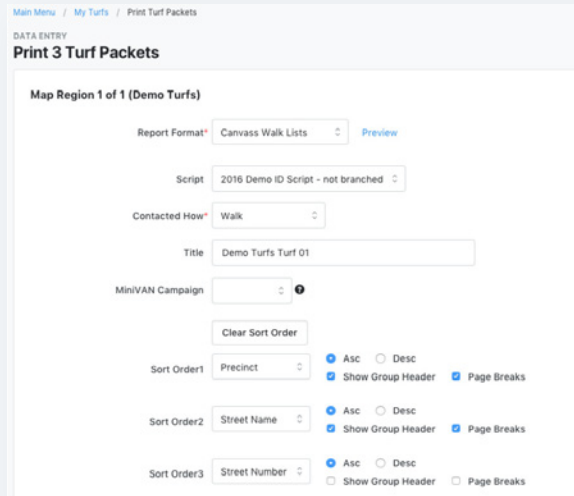
Download and Print PDF

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

	Title	Type	Created	Created By	File Size	Download Link	Delete
☐	Demo Turfs	Map Region	2/5/18 11:14 AM	Weiss, Gabrielle	292 KB	Download File	Delete

PDF Printing Instructions

Download Selected Files

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!**

Frequently Asked Questions

› **How does the MiniVAN app affect battery life?**

MiniVAN has been optimized to use as little battery life as possible and should last a three- to four-hour canvassing shift. We recommend that canvassers begin with a fully-charged phone and bring an additional battery.

To reduce battery usage, consider dimming your screen and staying in Household View.

› **Do my canvassers need phone data in order to use MiniVAN?**

Phone data is not required to use MiniVAN. Canvassers can download the list and sync the results back using WiFi. Set up a WiFi hotspot at each staging location to allow canvassers to sync their results.

› **Who should I contact for support?**

First, contact your organizer or a state VAN administrator for help. If your issue is still unresolved, please submit a ticket with your device information, replication steps, and the version of MiniVAN that you're using.

Always check to make sure that your app is up to date. We are releasing new updates all the time.

› **When do I need to be connected to phone data or WiFi?**

You only need to be connected to the internet to download your list and sync your results. If you're using optimized routing, you need data or WiFi to identify your route, but you can go offline during your canvass.

You do need to be connected to data or WiFi to collect contributions or use MiniVAN Manager.

› **My synched data is taking a while to show up.**

Refresh the commit queue. The data shows up in 5 to 10 minute increments.

› **I canvassed and synced my data. Afterwards, I re-downloaded the list and it looks like all of my results are gone! What happened?**

MiniVAN does not keep data after you have discarded a list—but you can rest assured, if you've synced the data, it is safe in VAN.

› **Some of the contacts in MiniVAN have a Voted icon next to them. What does that mean?**

The Voted icon indicates folks that have already voted. This helps you focus your efforts during Get Out the Vote or GOTV.

› **I'm encountering an error when I try to input my list number into MiniVAN.**

Most often folks have mistyped the list number, double check and try again! If you still can't download the list reach out to your organizer to submit a support ticket.

Additional Notes

- Make sure that you have a script associated with your turf before inputting your list number into MinVAN.

- If you're troubleshooting, make sure that your app is up-to-date. Most issues will be resolved by app updates.