



# The Official VANual

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



[ngpvan.com](https://ngpvan.com)

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# Welcome

Welcome to the VANual! Over the past few cycles, organizing has evolved and so has VAN. This updated guide describes new VAN features (as well as updates to your favorite tools) and how to use them in the ever-changing world of organizing. Be sure to watch out for our tips and tricks, which highlight some of the lesser-known features as well as best practices we've picked up from interacting with campaigns over the years. VAN is able to inform and power state and local campaigns while also being designed and scaled to manage the largest and most sophisticated organizing campaigns in history. Every election cycle, thousands of Democratic and progressive campaigns up and down the ballot use VAN to contact hundreds of millions of voters.

Now that you've got one of the most powerful tools in the political space in your hands, this comprehensive guide is here to make sure you're getting the most out of it. We cover many of the features campaigns use, but it's not exhaustive—we're always coming up with new ideas to make organizers' jobs easier. Start here and watch the [NGP VAN blog](#) for other product announcements and guides to learn more about what we can help you do. And always remember:



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

*-Ancient Campaign Proverb*

# Logging In & Out

In order to log in to VAN, you'll need to have a user account created for you. For most political campaigns, you should contact your state party for access, but feel free to get in touch with us directly if you have any questions about getting set up. Once your account has been created, you'll receive an email with prompts and a link to create your account.

## You'll need to:

### Create an ActionID

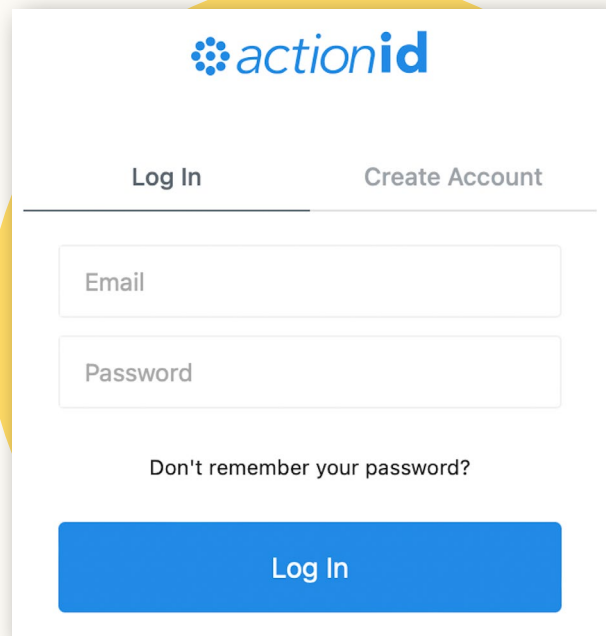
Your ActionID allows you to log in to VAN for any campaign you have access to with the same information, rather than creating separate usernames and passwords for each one. Your ActionID is yours for life, so we recommend using a personal email address when you create it.

### Set up two-factor authentication (2FA)

Two-factor authentication, or 2FA, protects your user account from unauthorized access by requiring you to verify your identity with an additional set of credentials. When you sign in to your account, you will use your ActionID email and password, and then you'll be required to enter a Verification Code sent to your phone or found in a mobile authenticator app, depending on which type of 2FA you've set up.

To enable 2FA for your ActionID, begin by going to [myaccount.ngpvan.com](https://myaccount.ngpvan.com) and log in with your **ActionID > Edit Profile**. Next, toggle **Two-Factor Authentication** to **On**. You can then choose to set up 2FA with an Authenticator App (recommended) or a phone number.

If you select the option to enable 2FA with an authenticator app, you will need to download an authenticator app of your choice. Most common authenticator apps will work with ActionID, including LastPass, Authy, and Google Authenticator. Once downloaded, use the app to scan the QR code on your computer screen. The app will display a code; enter that code on your screen and click **Enable**. You've now enabled 2FA for your ActionID! The next time you log in with your ActionID and password, you will need to open your app to view

A screenshot of the ActionID login interface. At the top is the ActionID logo, which consists of a blue gear-like icon followed by the text "actionid" in a blue sans-serif font. Below the logo are two tabs: "Log In" (which is selected and underlined) and "Create Account". Under the "Log In" tab, there are two input fields: "Email" and "Password". Below these fields is a link that says "Don't remember your password?". At the bottom of the form is a large blue button with the text "Log In" in white.

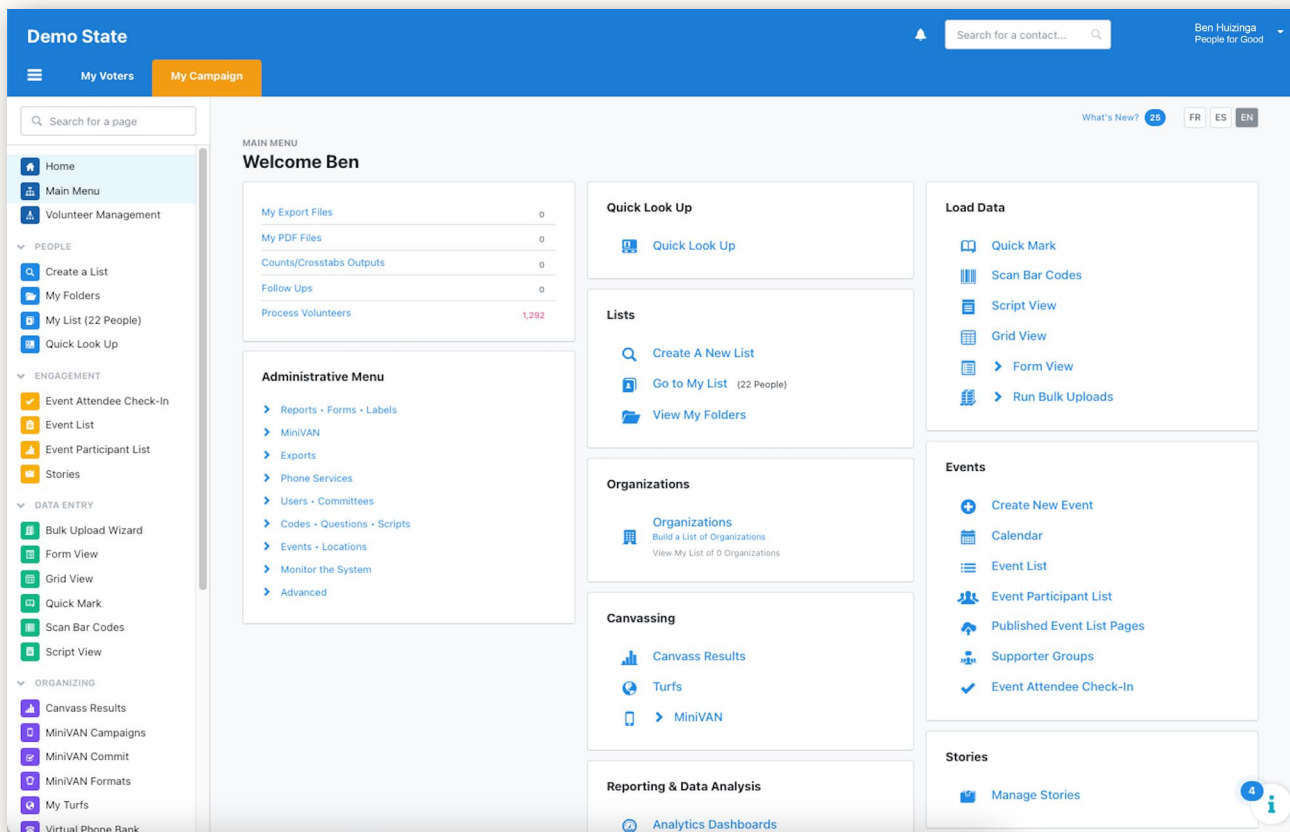
the code, and enter it on your screen to finish logging in. This will happen every 30 days or if you use a new browser or device.

If you choose to set up 2FA with a phone number, you will be prompted to send a code to your phone. At this point, you have the option of changing the phone number associated with your ActionID.

When you're ready, click **Send Code**. You will then see page where you can enter the code that was texted to you. **Enter that number > Verify**. You've now enabled 2FA for your ActionID!

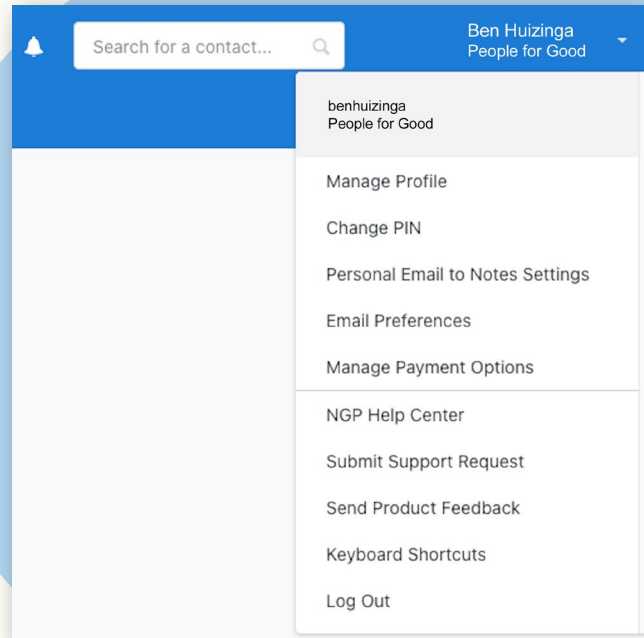
After setting up 2FA, **be sure to download your backup codes**. Having these codes easily accessible will be essential for logging in when you do not have access to your mobile device or 2FA is not working for any reason.

## Navigating VAN



Once you have logged in to VAN, you will likely see either the **Main Menu**, a landing page with multiple sub-menus that will take you wherever you need to go within VAN, or another dashboard (like the **Volunteer Management** dashboard). The quick-navigation sidebar on the left side of the screen is available on any page in VAN and it can help you easily navigate around VAN.

At the top-right corner of the screen, you'll see the account holder's name and the name of the VAN committee that you are currently working in. Click here to reveal a drop-down menu of account options, including updating your user profile, switching committees, and logging out of your account. From this menu, you can also access the VAN Help Center, an online collection of guides and instructions on how to use basic and advanced VAN features. There are options to submit product feedback and support requests as well.

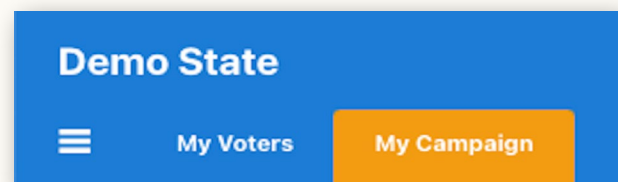


## My Voters + My Campaign

On the top-left corner of the screen is the logo of your VAN instance (for Democratic campaigns, you'll see the Votebuilder logo) and the tabs to switch between the **My Voters** and **My Campaign** databases.

**My Voters** houses the voter file for your state and includes a wide variety of information about each registered voter, including contact information, demographic information, voting history, and that voter's contact history. The majority of campaign work happens on the **My Voters** side of VAN, where organizers can create lists for phone banking, canvassing, mail programs, and more.

**My Campaign** is the volunteer management side of VAN where you will track the relationships that you build with your supporters. By default, the **My Campaign** database is empty, and profiles are added as volunteers and activists are recruited. The **Main Menu** of **My Campaign** is nearly identical to that of **My Voters**, with a few additions that are only available on the volunteer side (such as the **Events Menu**). Most basic functions, like **Quick Look Up** and **Create A List**, exist in both databases.





# Dashboards

The screenshot shows the Volunteer Management dashboard for user Brandon. At the top, there is a navigation bar with links: Main Menu, Quick Look Up, My List, View My Folders, My PDF Files (0), My Export Files (0), Support Requests (0), and Volunteer Management Settings. The dashboard is divided into several sections:

- Recruit Volunteers:** Engage with your volunteers by using existing lists of contacts or create your own custom lists. It includes links for Active Volunteers, Lapsed Volunteers, and Hot Leads, as well as options to Create A List, Load a List, and My List (20 People).
- Track Activity:** View the latest activity and performance of your efforts by running default and custom reports. It includes links for Event Shifts, Contact History, and View All Reports, as well as options to Enter Data, Commit MiniVAN Data, and Visualize Data.
- Phone Banks:** Create New, Join a Phone Bank, View All. It shows 0 Total Calls.
- Events:** Create New, View All, Open Shifts (0). It has tabs for Past, Today, and Upcoming.
- Recent Contacts:** Quick Look Up.

After logging into VAN, you may have seen the **Volunteer Management** dashboard. The dashboard shows you volunteer recruitment quick links, volunteer activity, **Phone Banks**, and **Events**. It gives you a broad summary of volunteer management efforts within the **My Campaign** database. If you need to navigate to it, click on **My Campaign** in the top left-hand corner and then go to the quick-navigation sidebar and click **Volunteer Management** near the top. With **My Campaign** selected, you can navigate to the **Volunteer Management** dashboard from the top of the sidebar as well. Some users can also save searches for others to use to easily search within **My Campaign**.

Under **Recruit Volunteers**, you will see some pre-generated saved searches to help you get started with volunteer recruitment.

- **Active Volunteers:** Volunteers who have completed at least one shift in the last 30 days.
- **Lapsed Volunteers:** Past Active Volunteers that have not volunteered in the last 30 days.
- **Hot Leads:** My Campaign records added in the last seven days who have not yet scheduled for an event.

Your campaign may have set up different searches for you that may also show up in this space. Users with the correct permissions are allowed to create saved searches that will show up on the Volunteer Management dashboard that can be used by all organizers.

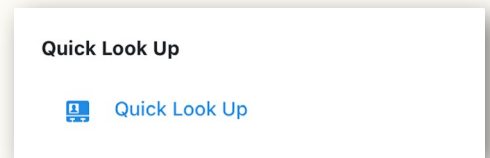
From the **Main Menu** with **My Voters** selected, you can navigate to the **Voter Contact** dashboard from the top of the sidebar. The **Voter Contact** dashboard populates with data as your campaign grows, providing a quick snapshot of organizing progress. You'll see **Phone Bank** stats, **Distributed Contacts Campaigns**, and shortcuts to some of the most-used tools in VAN: List Creation, Data Entry, and Canvass Results.

# Finding Voter Records

VAN gives organizers the ability to search through thousands of voter records and identify the correct profiles to act on.

## Use Quick Look Up

**Quick Look Up** is the fastest way to locate an individual voter record. Navigate there from the **Main Menu**.



## Search with known information

You can search for a voter profile with any contact information you have for a voter, like their name or phone number, or specific database identifiers, such as their VANID.



## Quick Look Up



Last Name  First Name  Middle Name  Nickname  DOB

Voter File VANID

Street Address  City  Zip  County

Email  Phone

Use SmartName search technology  Exclude Unregistered Voters

Remember Filters

Clear


Search

Name	Address	City	Likely Party	Age	Phone	Email
<a href="#">Smith, Jane</a>	123 Main St	Scranton		41	(123) 456-7890	
<a href="#">Smith, John</a>	123 Main St	Scranton		53		

## Edit voter profile

Once you have found the voter profile that you are looking for, click on their name to view and edit their information. From this screen, you can update contact information, apply **Survey Responses** and **Activist Codes**, view contact and volunteer history, and more. You can also add voters to My Campaign under the **Voter File VANID** section. Simply click the drop-down menu and click **Add to My Campaign**. From the final **Actions** panel, internal changes to the user account can be generated, such as merging duplicate profiles or creating a VAN user account. To make sure that we are addressing voters with a correct, complete, affirming, and properly spelled name, users with the correct security profile can now edit the names of voters in the Voter File.

Home / Quick Look Up / Jane Smith ES EN



**Jane Smith**  
 (123) 456-7890 (Home)  
 123 Main St, Scranton, PA 18503 (Voting)

All Details Overview

Voter File VANID

Sta... Script Form Clear Print Save

> Name - Salutation

> Self-Reported Demographics

> Custom Contact Fields

> Follow Ups

> Voter File VANID

VF VANID 12345678

State File ID

VANID [Add To My Campaign](#)

Canvasser [Add New](#)

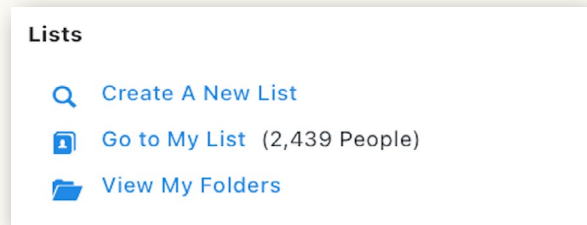
> Vital Stats & Contact Preferences

# Creating Lists

Creating a list of voters is the first step to craft your audience for a variety of campaign actions (canvassing, phone banking, mobile messaging, etc.). From the **Lists** panel on the **Main Menu**, you can navigate to either create a new list, return to a previous list, or access a list that has been saved into a folder.

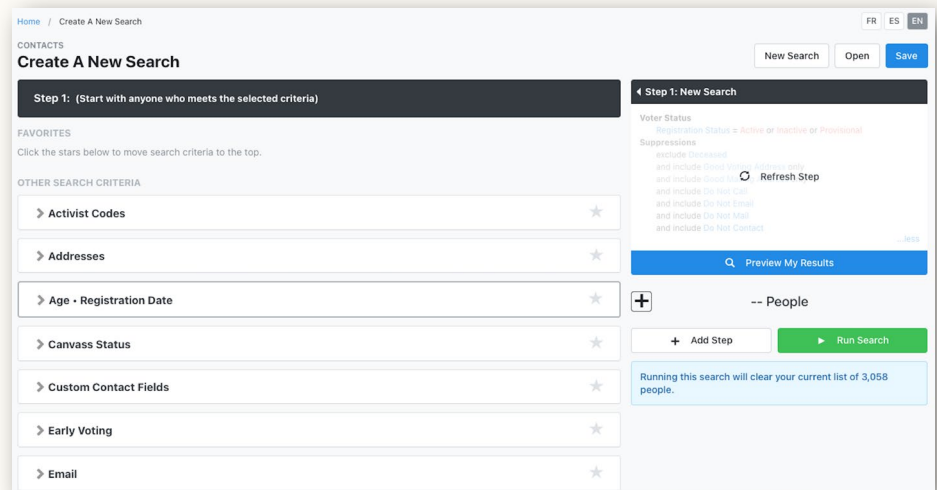
## Create A New List

**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 points, such as location (under the **Addresses** tab, you can select to search by state, city, zip code, address, etc.), **Home District** (congressional, county, precinct, etc.), demographic information, and profile characteristics, such as having a listed phone number or email address. When pulling lists, two 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 example.



## Pro-Tip | Mark your commonly used search criteria

If you click on the stars on the right side of the drop-down sections, you can move your commonly used criteria to the top of your feed.



## 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 here). To use this feature, rather than selecting the drop-down menu, click on the blue label to access the select multiple menu.

## 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 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.



CONTACTS  
**My List** Edit Search Load List Save List As New Search

633 People 579 Home Phones 595 Preferred Phones 580 Doors 581 Mailboxes

Print Letters Labels Calls Export MiniVAN Counts Reports Cut Turf Split Grid Script Form Task Bulk Apply Copy

Map Advertis... Messages

Description

Last Name First Name

Remember Filters Refresh Results

Name ^	Address	City	Phone	Age	Precinct	Work Phone
Smith, Jane	123 Main St	Scranton	(123) 456-7890	41		
Thomas, Joseph	789 Scranton Ave	Scranton	(789) 123-4560	43		

The icons at the top of the screen of the **My List** page display the most common actions that organizers will use lists for: Mailing (Letters, Labels), Phone Banking (Virtual Phone Banks, Robocalls, Robosurveys), Canvassing (MiniVAN, Cut Turf, or Map), Data Entry (Grid, Script, Form, or Bulk Apply), and moving data to other sources (Export or Messages). 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 icons to the front.

CONTACTS  
**My List** Edit Search Load List Save List As New Search

633 People 579 Home Phones 595 Preferred Phones 580 Doors 581 Mailboxes

Print Letters Labels Calls Export MiniVAN Counts Reports Cut Turf Split Grid Script Form Task Bulk Apply Copy

Map Advertis... Messages

# Saving + Sharing Lists

LIST

## Save My List

Saved List  
Saved Lists consist of a static list of contacts.

New List

Replace an old List

Folder\*

New Folder

Name\*

Description

Up to 250 characters

Saved Search  
Saved Searches consist of a dynamic list of contacts.  
Saved Searches are automatically updated.

## Lists

## Committee Access

Committees with Access	Committees <b>without</b> Access
People for Good	Yes on Question 3 Action Group Victory Committee
<input type="button" value="Remove"/>	<input type="button" value="Add"/>

## Saving Lists

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

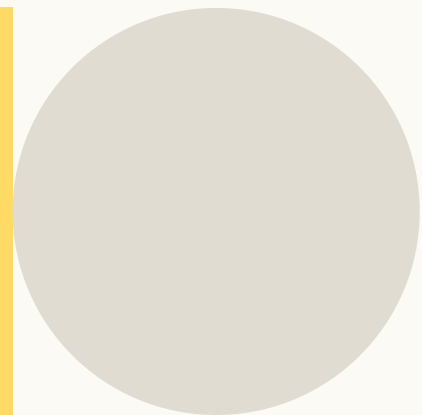
VAN allows the option to save a list either as a fixed set of people, or **Saved List**, or as a dynamic **Saved Search** (the latter means your criteria is saved and can be updated as voter profile information changes).

## 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** panel of the **Main Menu**.

*Pro-Tip* | **Set saved searches for your organizers**

Certain users can set saved searches to show up automatically on their field organizers' volunteer management dashboard.



## 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.





# Survey Questions + Activist Codes

**Survey Questions** and **Activist Codes** are a critical part of voter contact, as they enable 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 Admin drop-down

From this screen, you can view and edit existing Survey Questions and Activist Codes.

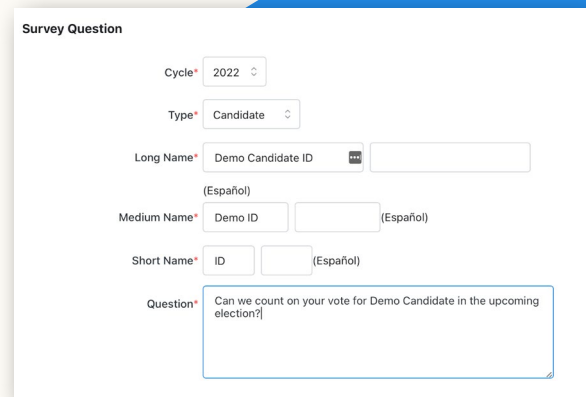
## Select Create New Survey Question or Create New Activist Code from the top-right corner of the screen

## Enter Survey Question/Activist Code Text and Name Details

Once you have filled in the text and details, click **Save**. For Activist Codes, this is all you need to do.

## Enter responses for Survey Questions

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.



The screenshot shows a 'Survey Question' form with the following fields:

- Cycle\*: 2022 (dropdown)
- Type\*: Candidate (dropdown)
- Long Name\*: Demo Candidate ID (text input)
- (Español)
- Medium Name\*: Demo ID (text input) (Español)
- Short Name\*: ID (text input) (Español)
- Question\*: Can we count on your vote for Demo Candidate in the upcoming election? (text area)

Response English [Español]	Resp Medium Eng [Esp]	Resp Short Eng [Esp]	Master Response
1-Strong Support [1-Strong Support]	1-S [1-S]	1 [1]	<input type="checkbox"/> Edit Delete
2-Lean Support [2-Lean Support]	2-L [2-L]	2 [2]	<input type="checkbox"/> <input type="checkbox"/> Edit Delete
3-Uncecided [3-Uncecided]	3-U [3-U]	3 [3]	<input type="checkbox"/> <input type="checkbox"/> Edit Delete
4-Lean Other [4-Lean Other]	4-L [4-L]	4 [4]	<input type="checkbox"/> <input type="checkbox"/> Edit Delete
5-Strong Other [5-Strong Other]	5-S [5-S]	5 [5]	<input type="checkbox"/> Edit Delete

## Pro-Tip | Add Spanish responses for bilingual programs

If you are running a bilingual program, you can add Spanish language responses that will show up when your volunteers select Spanish as their language on MiniVAN and OpenVPB.



# Creating 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. Click on **Scripts** in the Administrative Menu, enter a name and description of the script, and click next.

## Script Types:

Before you begin assembling your script, you'll need to decide if you want to use a linear or branched script. **Linear scripts** usually meet the needs of most campaigns. **Branched scripts** account for conditional responses, but they are reserved only for Open Virtual Phone Banks (OpenVPB) and MiniVAN to provide volunteers with different script paths to address different scenarios.

For instance, if you wanted to offer a different script path for voters who may be voting for your candidate compared to someone who is undecided, a branched script could be beneficial in that situation. You may ask a supporter to volunteer for the campaign or if they would be willing to put a sign in their yard to show their support. You may ask someone who is undecided on supporting your candidate what issues are important to them and try to encourage volunteers to engage with them over where the candidate stands on those issues. These scripts are slightly more difficult to build, but they can be helpful for guiding conversation, especially for new volunteers.

## How to use branched scripts on MiniVAN

Branched scripts help guide canvassers on the doors by programmatically showing the next question on the script based on the answer to the first. You'll need to select the MiniVAN Campaign associated with your branched script or select your branched script from the script drop-down on **Script Sort Options** when printing or generating list numbers.

## 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 **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 if necessary

Script elements can be edited or deleted from the preview panel using the buttons on the right and rearranged by clicking and dragging the icons on the left.

If you are using a linear script, you can simply move the elements to where they make the most sense.

If you are using a branched script, another icon will appear to the right of the elements in your script. These icons have drop-down menus next to them that indicate what script element will be shown after taking action. For instance, if someone answered “yes” to your support question, you would branch to another question about volunteering for the campaign or hosting a yard sign. If someone answered “no,” you could branch them to a question asking about what issues are important to them. Make sure to test this type of script out before distributing to volunteers to ensure the branching works how you want it to!



**Branched Script Preview**

1	Text	Hi, is [voter name] available?	2	Delete Edit
2	Text	My name is [caller name] and I'm calling with a Demo Campaign.	3	Delete Edit
3	Survey Question: Demo Candidate ID	Can we count on your vote for Demo Candidate in the upcoming election? 1-Strong Support 2-Lean Support 3-Undecided 4-Lean Other 5-Strong Other No Response	4 4 5 5 6 5	Delete
4	Activist Code: 2022 Volunteer	Would you volunteer with the campaign? Yes No Response	6 6	Delete
5	Text	What issues are important to you in the upcoming election?	6	Delete Edit
6	Text	Thanks for your time. Have a great day!	End	Delete Edit

Save Order

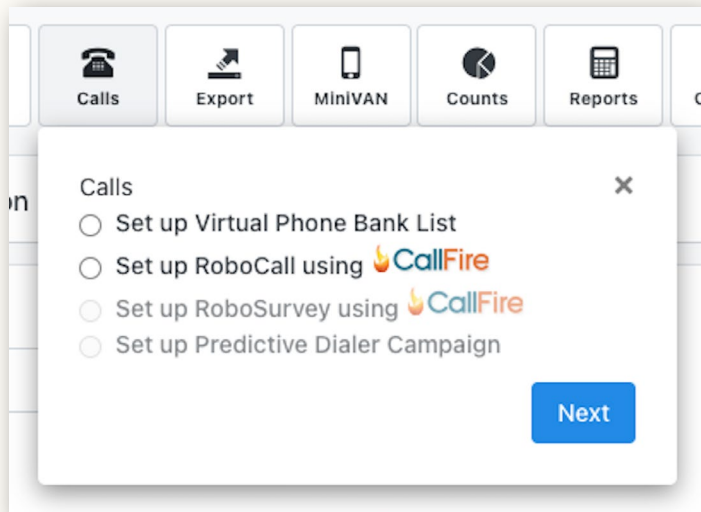
## Choose Canvass Result options

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

# Creating a Phone Bank

When creating a phone bank, organizers can create **Virtual Phone Banks (VPB)** which allow volunteers to make calls and enter data to save campaigns hours of data entry.

## Virtual Phone Bank



### Pro-Tip

If you already have a saved search created and want to make a **Virtual Phone Bank**, head straight to **Virtual Phone Bank List** and click **Add New Phone Bank**.

### Select the Calls option from My List

From the menu, select **Set up Virtual Phone Bank List**. Campaigns may also choose to set up Robocalls and Robosurveys through our partner, CallFire, from this menu.

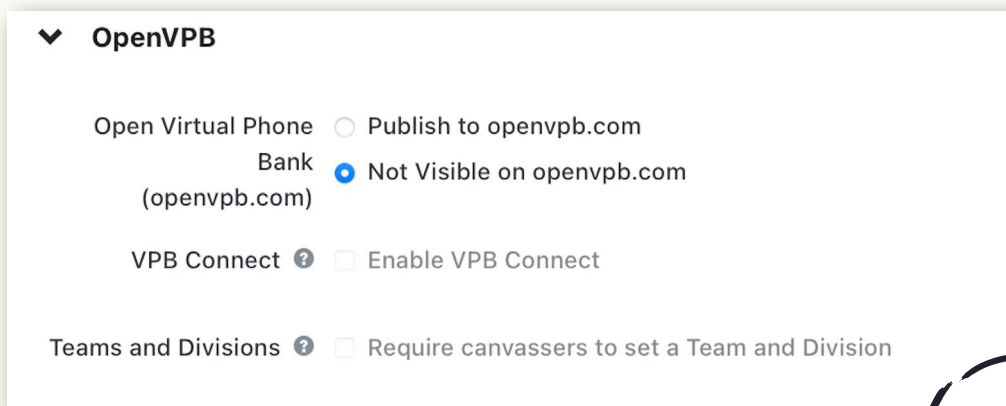
You will then choose if you want to use a **Static List** or a **Saved Search**. As a reminder, **Static Lists** are a fixed set of people while **Saved Searches** are dynamic and pull new people in as they fit the criteria of the search. If you select a **Saved Search**, the Saved Search will run again when the phone bank is sent to the next round. Choose whichever option is best and proceed to the next steps.

### Choose phone bank settings

Clicking next will navigate the user to the **Virtual Phone Bank Details Page**, where the majority of the phone bank is set up including what fields will be displayed and other advanced options. First, the organizer will need to name the phone bank, choose a script (branched scripts are only available in OpenVPB), and pick a start and end date for the phone bank. The phone bank will only be available to organizers and volunteers on the user end during this timeframe.

## Enable OpenVPB

As you scroll down, you will notice you can publish the VPB to openvpb.com. By publishing this VPB to [openvpb.com](https://openvpb.com), volunteers can be emailed the link and start making calls from wherever they are—without needing a user account created. They can create an ActionID and start making calls right away. To publish an **OpenVPB**, simply select the **Publish** option on the OpenVPB Panel.



▼ **OpenVPB**

Open Virtual Phone Bank (openvpb.com)  Publish to openvpb.com  Not Visible on openvpb.com

VPB Connect  Enable VPB Connect

Teams and Divisions  Require canvassers to set a Team and Division

You can also enable **VPB Connect** and **Teams and Divisions** if they are available for your committee.

---

## VPB Connect

VPB Connect is click-to-dial functionality that allows volunteers to make calls faster than before. Callers place the call through the browser and calls are routed through a central caller ID—which means volunteers don’t need a phone to make phone calls. By eliminating the need to manually type phone numbers in, volunteers can make more calls per hour, and help move through your voter contact universes faster. [Learn more about VPB Connect here.](#)

## Teams and Divisions

Enabling **Teams and Divisions** on OpenVPB allows users logging in with ActionID to select their team and division so that their data is correctly attributed.

---

If you scroll down further, you will find a few other settings to configure. If you would like to set **Daily Availability, Time Limit** (number of minutes allowed in an active Virtual Phone Bank session), or **Contact Limits** (number of attempts allowed to contact an individual in a Virtual Phone Bank session), you can do that here. You can also distribute voters by zip code. When distribute by zip code is turned on, a caller can enter a zip code and VPB will send them contacts in that zip code first. If there are no contracts in the VPB in that zip code, it sends the next contact at random.

- Householding** allows you to choose if you want to display others in the household (either those in the VPB or anyone) or not.
- Alternate Numbers** allows users to call alternate numbers for contacts. Sometimes, contacts have multiple phone numbers attached to their voter profile. This can happen for a variety of reasons, but by allowing calls to alternate phone numbers, you can clean through your data to help connect efficiently with voters in the future.
- Skipping** gives people the opportunity to skip households or contacts. Skipped contacts are re-added after one hour and sent to the next round.

## Event Scheduler

From this screen, organizers can also choose to include the **Event Scheduler** in their phone scripts (for Virtual Phone Banks). Simply check the **Include Event Scheduler** box and select the date range and event types that will be shown to callers. The **Event Scheduler** is particularly useful if you are calling through lists of potential volunteers or attendees who you want to schedule for upcoming canvasses, phone banks, town halls, or other events. Note: Events need to already be created in My Campaign for them to show up in the Event Scheduler.

▼ **Events**

Enable event scheduler to enable callers to schedule contacts for upcoming events. Adjust the event filters to narrow the list of events shown to your callers on Virtual Phone Bank and OpenVPB.

Event Scheduler  Include Event Scheduler

Event Date \*  to

Event Type

Event Role

Event Status \*

## *Pro-Tip* | Check the Daily Availability

If you cannot access a phone bank, check the Daily Availability and make sure you are trying to access it within the time frame you set up.



## Setting a designated contact

### Display Settings


Save & Preview

Customize the layout and information displayed on your Virtual Phone Bank.

▼ **Designated Contact**

Decide who virtual phone bank volunteers should reach out to if they need help.

Name

Phone  

Email

*We strongly suggest setting up a designated contact for volunteers to reach out to if they have questions. This name and phone number will be available to volunteers at the top of their screen throughout the phone bank.*

## Choose what information is available to your callers

On the Display Settings panel on the right side of the screen, organizers can customize the display screen that volunteers will see as they make calls. Users can choose what contact and voting information will be displayed and editable by volunteers. Most, but not all, fields are available on both VPB and OpenVPB, but some are only available on VPB for privacy.

To support your Spanish-speaking volunteers and organizers, Latin-American Spanish translation is available for Open Virtual Phone Bank, MiniVAN, and a number of pages in VAN. While we will translate text provided by VAN on these pages, you will need to provide translations for Scripts, Activist Codes, and Survey Questions. If their desktop browser or phone is set to Spanish, the text provided by VAN will translate automatically.



### Display Settings

Save & Preview

Customize the layout and information displayed on your Virtual Phone Bank.

▶ **Designated Contact**

---

▶ **Basic Demographics**

---

▼ **Contact & Location Information**

Enable read-only information shown for each contact on the list.

[Select All](#) | [Deselect All](#)

- Applicant Address
- Application was Mailed
- Ballot Address Line 1
- Ballot Address Line 2
- Ballot Address Line 3
- Ballot City

**Accessibility Features:** OpenVPB is manually tested against Web Content Accessibility Guidelines (WCAG 2.1) with assistive technologies, including screen readers, keyboard accessibility, speech recognition, and screen magnification. A complete Voluntary Product Accessibility Template (VPAT) is available by contacting Support.

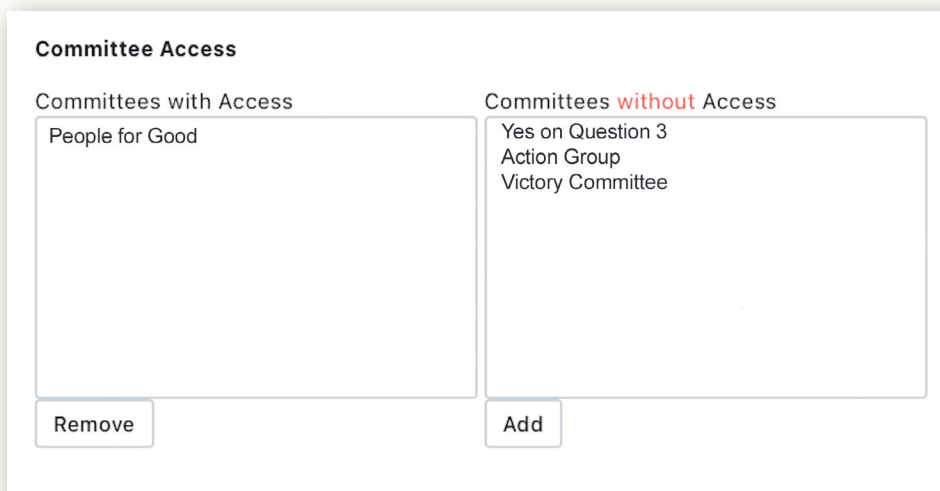
## Publish and confirm settings

After finalizing display preferences, clicking **Next** will lead to a final confirmation screen—the same one that you’ll see if you come back to edit the phone bank or send it to a second round of calls once it has been launched. On this screen, the Virtual Phone Bank Code and link to the OpenVPB (if one was published) are displayed in the top right corner.

## Share the phone bank

If you are using OpenVPB, you can share a link and anyone will be able to create an ActionID and start making calls.

If you are using Virtual Phone Bank, at the bottom of the screen, the User Access Panel is where you can control who will have access to make calls from the phone bank. Select the users you want to give access to and add them to the correct column. This action will make the phone bank show up in Quick Tasks, Virtual Phone Bank, and the Volunteer Recruitment and Voter Contact dashboards for selected users. Anyone who has the code can also make calls in this phone bank or callers can go to [openvpb.com](http://openvpb.com) and enter the code to start making calls.



The screenshot shows a 'Committee Access' panel with two columns. The left column is titled 'Committees with Access' and contains a box with 'People for Good' and a 'Remove' button below it. The right column is titled 'Committees without Access' and contains a box with 'Yes on Question 3', 'Action Group', and 'Victory Committee', with an 'Add' button below it.

## Preview and save the phone bank

Once you are happy with all of the phone bank settings, clicking **Save and Preview** in the **Display Settings** panel will create a preview of what the phone bank will look like from the user’s end in Virtual Phone Bank for you to review.



## Make any needed additional edits to the phone bank

The back end of your phone bank can be accessed at any time through the **Administrative Menu > Phone Services > Virtual Phone Bank**. To make edits to the phone bank, simply click on the name from this page.

## Make phone calls

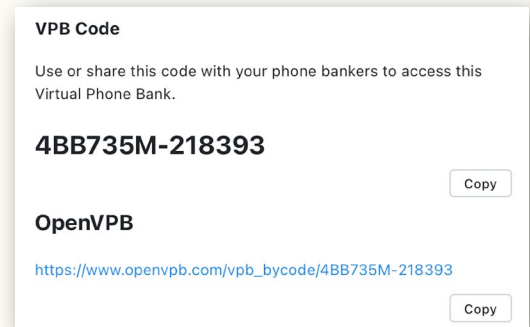
If the phone bank was published as an OpenVPB, the link or VPB code will need to be sent to volunteers.

When volunteers without VAN user accounts click on the OpenVPB link, they will be prompted to create a VAN ActionID, and then log in to begin making calls.

For VPB, the user end can be found on the **Quick Tasks** panel on the **Main Menu** or on the Volunteer Recruitment or Voter Contact dashboards for anyone who has been given access. Once the phone bank has been saved, the **Sharing** panel will be displayed in the top-right corner. The VPB code can be given to any phone banker with a VAN user account to allow them to access the phone bank.

Both OpenVPB and VAN's regular Virtual Phone Bank feature are mobile responsive, and volunteers can make calls from any device. As shown here, a volunteer who logged in to the phone bank on their smartphone through an OpenVPB link will click on the phone number to call the voter and the caller can input the Survey Responses directly on their device.

Volunteers can also enter phone numbers, emails, and notes in OpenVPB. If volunteers call the wrong number and the person on the phone can offer the correct number, volunteers can enter it in the phone number field to add it to their voter file.



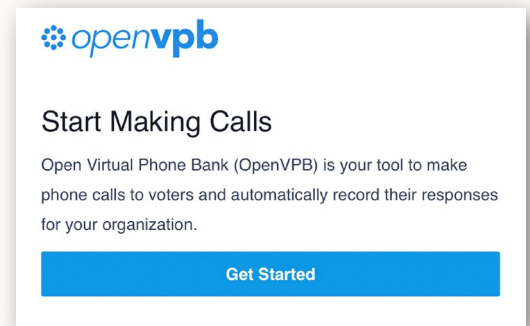
**VPB Code**

Use or share this code with your phone bankers to access this Virtual Phone Bank.

**4BB735M-218393** Copy

**OpenVPB**

[https://www.openvpb.com/vpb\\_bycode/4BB735M-218393](https://www.openvpb.com/vpb_bycode/4BB735M-218393) Copy

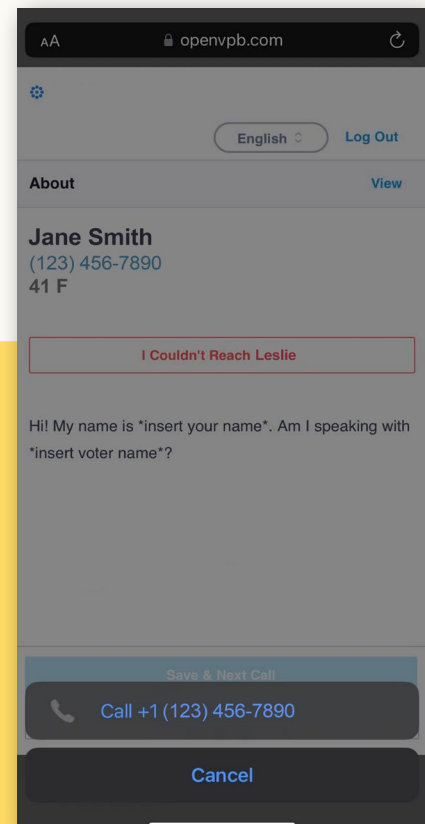


**openvpb**

### Start Making Calls

Open Virtual Phone Bank (OpenVPB) is your tool to make phone calls to voters and automatically record their responses for your organization.

[Get Started](#)



AA openvpb.com

English Log Out

About View

**Jane Smith**  
(123) 456-7890  
41 F

I Couldn't Reach Leslie

Hi! My name is \*insert your name\*. Am I speaking with \*insert voter name\*?

Save & Next Call

Call +1 (123) 456-7890

Cancel

## How to make calls with VPB Connect

If VPB Connect is enabled, volunteers can click to call from their browser and calls are routed through a central caller ID. This works when calling from a laptop or on a mobile device.

## Virtual Phone Bank List

The **Virtual Phone Bank List** allows you to quickly see all your Virtual Phone Banks in one location to monitor progress and take action if needed. If you are using a **Saved Search**, you can create a new VPB from this page by clicking **Add Virtual Phone Bank**.

### Monitor phone bank progress

To track phone bank progress and results, access the back end of the phone bank as described above, and click on **Report** next to the name. Reports can be sorted by Canvass Results, Script Results, or both, using the tabs above.

Canvass and Script Results		Canvass Results		Script Results									
Canvasser	Total Attempts	ID						Ride				Healthcare	
		1 - Strong Hillary	2 - Lean Hillary	3 - Undecided	4 - Lean Republican	5-Strong Republican	Unknown	Yes	No	Unsure	Unknown	Yes	No
Weiss, Gabrielle	18	3	2	3	0	1	9	2	6	0	10	4	14
Total Attempts	18	3	2	3	0	1	9	2	6	0	10	4	14

### Sending phone bank to the next round

When your callers are finished with the first round of calls, send the phone bank to the next round to refresh the phone bank list. This will remove people who have been successfully contacted, add back people who were skipped or marked as Not Home, and refresh the saved search. You can send the phone bank to multiple rounds.

For information on how to create paper lists for calls, check the [Appendix](#) after the [Glossary](#).

# Creating a Canvass

Canvasses are the backbone of a political campaign field program, which is why VAN makes it easy for organizers to get canvasses set up and volunteers out on doors quickly.

## *Pro-Tip* | How to Canvass with MiniVAN

MiniVAN, our free mobile canvassing app, saves volunteers and organizers time and resources before, during, and after canvassing. No more fumbling through paper packets, entering data for hours on end, and last, but certainly not least, Packet Land can be a thing of the past. [Learn more about how to canvass with MiniVAN here.](#)

## Turf Cutter

### 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.

**Try to avoid having volunteers crossing busy or major streets or walking between doors that are too far apart. You want volunteers' time to be spent talking to voters, not traveling between doors or figuring out how to get around different barriers (like busy roads, walls, bodies of water, etc.)**

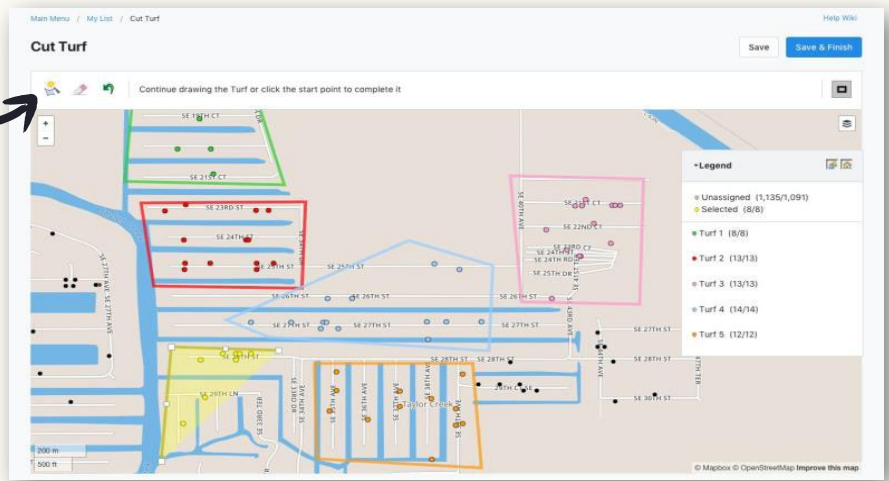
## *Pro-Tip* | Don't create overlapping turfs

Make sure turf boundaries do not cross. Keep in mind the geography and density of your turf to make sure you create walkable turfs for your volunteers. If you don't have time to create turfs, check out [Distributed Contacts Campaigns](#).



## Turf cutter actions

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



## Save the turf

When you are 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.

## Take action on turfs

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

From the **My Turfs** screen, select the desired region(s) or turf(s) and click on the **Quick Actions** drop-down menu. This menu houses a few actions:

- **Print:** Will create full canvassing packets (region summary, turf maps, and contact lists) to print
- **Export:** Allows you to export a spreadsheet of information on the selected turf(s)
- **Generate List Number:** Generates a list number for users to input in MiniVAN
- **Send to MiniVAN:** Allows users to send turfs to specific MiniVAN users to download and canvass

### Canvassing

- Canvass Results
- Turfs
- MiniVAN

### ✓ Quick Actions

- Print
- Export
- Generate List Number
- Send To MiniVAN
- Print for MiniVAN

## Did you know you can print for MiniVAN?

This action generates a lightweight paper packet to make distributing turf easy during canvass launches.

Choose whatever action you want to take and proceed with the rest of the process.

If you choose a **Quick Action** that involves **MiniVAN**, you may need to select a **MiniVAN Campaign**. If you don't have a **MiniVAN Campaign** developed, here is how you can create one.

For information on how to create paper walking lists, check the [Appendix](#) after the [Glossary](#).

## How to create a MiniVAN Campaign:

**MiniVAN Campaigns** is a roll-up of settings for your canvassers, including script, contact method, and display fields that are available on the app. From the Administrative Menu on the **Main Menu** of My Voters, select **MiniVAN Campaigns**. Click on **Add New MiniVAN Campaign** in the upper-right corner. Choose a **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** drop-down menu.

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

### 1 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** drop-down menu to select which script to send out.

### 2 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 drop-down menu to select your default script and select **Add New Script** on the right to select each additional script.

### 3 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.

While creating a MiniVAN Campaign, you can also enable **MiniVAN Manager**, **MiniVAN Contributions**, and **Teams and Divisions**.

## Choose print settings and generate List Numbers

If you choose to **Print for MiniVAN** or **Print**, 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. If you select a **MiniVAN Campaign**, it will override the options selected for Script, Contacted How, and Report Format.

If you are generating list numbers to distribute to volunteers without printing, the list numbers will show in **My Turfs**. Please note that any list number will work in MiniVAN because there is a default MiniVAN format selected for all list numbers.

Home / My Turfs / Print

DATA ENTRY

### Print

Report Format\* Walking List [Preview](#)

Default system walking list

Script

Contacted How\* Walk

Title Baker County Precinct 2A

MiniVAN Campaign Demo Branched Campaign ?

Clear Sort Order

Sort Order1 County  Asc  Desc  Show Group Header  Page Breaks

Sort Order2 Precinct  Asc  Desc  Show Group Header  Page Breaks

Sort Order3 Street Name  Asc  Desc  Show Group Header  Page Breaks

## Download and print PDFs

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 and print it out!

PDF Printing Instructions

Download Selected Files

1 selected file: 1.88 MB (500 MB maximum)

<input checked="" type="checkbox"/>	Title	Type	Created	Created By	File Size	Download Link	Delete
<input checked="" type="checkbox"/>	Baker County Precinct 2A	Map Region	9/13/22 10:51 AM	Blumenherst, Brandon	1.97 MB	<a href="#">Download File</a>	<a href="#">Delete</a>

## My Turfs

**My Turfs** is where you can see all your map regions and launch and monitor your canvasses. From this page, you can see your map regions and turfs, take Quick Actions to generate List Numbers and Turf Packets, see the last time a turf was walked, monitor progress through turf for canvassers on MiniVAN, and refresh Map Regions.

# Distributed Contacts Campaigns

**Distributed Contacts Campaigns** are designed to completely automate the turf cutting process, saving hours of valuable time for campaign staff and allowing increased flexibility for volunteers. All you need to do is set your universe and the number of doors you want volunteers to knock, and MiniVAN will do the rest. Volunteers will enter the list number and MiniVAN will select the doors closest to them.

## When should Distributed Contacts Campaigns be used?

We've seen folks use Distributed Contacts Campaigns in a number of creative ways, such as running lit drop programs, ballot cure operations, and generally creating walk universes where staff is low but volunteers are ready to knock doors. While hand-cut turf by an organizer who knows their turf is always going to be the gold standard for turf creation, Distributed Contacts Campaigns can be used when you don't have the time or the staff power to cut turfs manually.

Be sure to include enough doors and include a step in your saved search to remove folks who have already been canvassed to make sure folks aren't contacted more than once.

## How to create Distributed Contacts Campaigns

VAN makes things easy to create a new Distributed Contacts Campaign. After creating and saving a saved search, find the **Canvassing** panel on the **Main Menu** and select the MiniVAN drop-down menu, then click on MiniVAN Distributed Contacts.

From the Distributed Contacts List Page or the Voter Contact dashboard, select **Add New Distributed Contacts Campaigns**. Then, 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. Next, you'll see a list number that you can distribute to all of your canvassers. Each canvasser will use the same list number, but they will receive a unique list of doors. Their turf will be auto-generated based on where they are located when they type the list number into the MiniVAN app.

After the canvass, you will be able to see a full Distributed Contacts report. You can check the status of your Distributed Contacts Campaigns in the Reports Manager.

## Street Team Canvassing

Leverage the canvassing power of MiniVAN without a pre-loaded list of contacts or households with **Street Team Canvassing**. This add-on allows you to recruit supporters and collect data at events or on the street using MiniVAN. [Learn more about Street Team Canvassing here.](#)

### Monitor the canvass

During the canvass, progress will be auto-synced by default back to VAN as data is entered by volunteers in MiniVAN. While they can still sync data manually by clicking the icon, auto-syncing makes sure data is not lost at any point during the canvass. If you turn off auto-sync, make sure to have your volunteers sync one last time before they leave the canvass.

Once the canvass is complete, have volunteers sync their data one last time (just to be safe!) and make sure you ask volunteers when they can come out again to help knock doors!

### *Pro-Tip* | Add MiniVAN Manager for real-time data

If your campaign has MiniVAN Manager, staff can also receive real-time data from volunteers who are using MiniVAN. You can see where your canvassers are, when they knocked their last door, what their contact rate is, and more. [Learn more about MiniVAN Manager here.](#)



## MiniVAN Commit

Once data is synced to VAN from MiniVAN, you need to commit that data for it to be stored in VAN. You can access **MiniVAN Commit** in the quick-navigation sidebar under the **Organizing** header or by going to the **Main Menu**, finding the **Canvassing** panel, clicking on **MiniVAN**, and then clicking on **MiniVAN Commit**. You can also access **MiniVAN Commit** from Turf Manager. MiniVAN Commit does not update in real time. You can manually refresh the page as it updates every 10 to 15 minutes.

Once you get to the **MiniVAN Commit** screen, if you just need to commit the data, simply click the box next to the **Turf** and then click Commit in the upper right corner. If you need to review the data, click on the blue **Attempts** number to check things out before you click **Commit**.

### *Pro-Tip* | Add contacts from MiniVAN

On any MiniVAN list, you can search the voter file and add a contact. So, if you run into someone on your turf who isn't on your list, you can find them and record your conversation.



# Canvass Results

After MiniVAN data has been committed, you can view the results on the **Canvass Results** page, found on the **Canvassing** panel of the **Main Menu** screen.

The **Group By** menu will change the first column of the report, allowing organizers to view results by county, district, team, canvasser, and more. Users also have the ability to filter based on date range, campaign, and input and contact types.

REPORT

### Canvass Results by County

Export To Excel

Committee:  Date From: 9/1/2018 Date To: 8/8/22

Input Type:  Contact Type:

Group By:  Filter:  Campaign:

Refresh Results

County	Not Home (# of Attempts)	%	Refused (# of Attempts)	%	Moved (# of Attempts)	%	Deceased (# of Attempts)	%	Canvassed (# of Attempts)	%	Total Attempts
Baker	17	2%	3	0%	3	0%	0	0%	729	97%	755
Bradford	0	0%	0	0%	0	0%	0	0%	796	100%	798

# Scheduling Events

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

## In My Campaign, click Create New Event

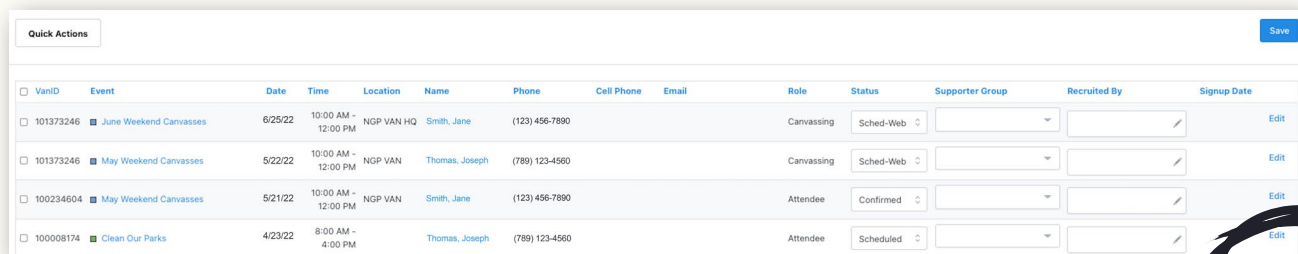
The command to create a new event can also be accessed through the calendar or event list pages.

## Select event type

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

## Enter event details

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



VanID	Event	Date	Time	Location	Name	Phone	Cell Phone	Email	Role	Status	Supporter Group	Recruited By	Signup Date
101373246	June Weekend Canvasses	6/25/22	10:00 AM - 12:00 PM	NGP VAN HQ	Smith, Jane	(123) 456-7890			Canvassing	Sched-Web			Edit
101373246	May Weekend Canvasses	5/22/22	10:00 AM - 12:00 PM	NGP VAN	Thomas, Joseph	(789) 123-4560			Canvassing	Sched-Web			Edit
100234604	May Weekend Canvasses	5/21/22	10:00 AM - 12:00 PM	NGP VAN	Smith, Jane	(123) 456-7890			Attendee	Confirmed			Edit
100008174	Clean Our Parks	4/23/22	8:00 AM - 4:00 PM		Thomas, Joseph	(789) 123-4560			Attendee	Scheduled			Edit

Select the number of **Shifts** for the event, input shift names and time frames, and then click **Next**.

If you are hosting repeating events, you can set those up here to save you time. You can also set the repeating events to end after a certain date or after a certain number of occurrences. Once you have that squared away, click **Next**. Add the location of the event. If it is a location that has not been used before, you will need to click **Create New** and add the address. Click **Next**.

You can then select which **Roles** you would like to be available for Online Actions.

## Online Actions: Signup Forms

You can make an online actions signup form for any event. Check **Publish Online Signup Form(s)** to generate a signup form volunteers can use. After that, you will need to check the box to **Publish Online Action Form(s)**. Choose your Event Template and add a **Public-Facing Name** and **Public-Facing Description**.

### *Pro-Tip*

You can also choose to make an event available in OpenVPB. Enabling this option will allow callers on OpenVPB to schedule people to attend the event.

## Publish the event

Click **Next** and set your sharing settings and then click **Finish**. Under the **Online Signup Form** drop-down, there will be a link that you can publish online or send to your volunteers to begin gathering signups immediately. Before you send the link, make sure to review the signup to make sure everything is displaying correctly! Organizers can also add attendees through phone bank, canvass scripts, or any data entry method.

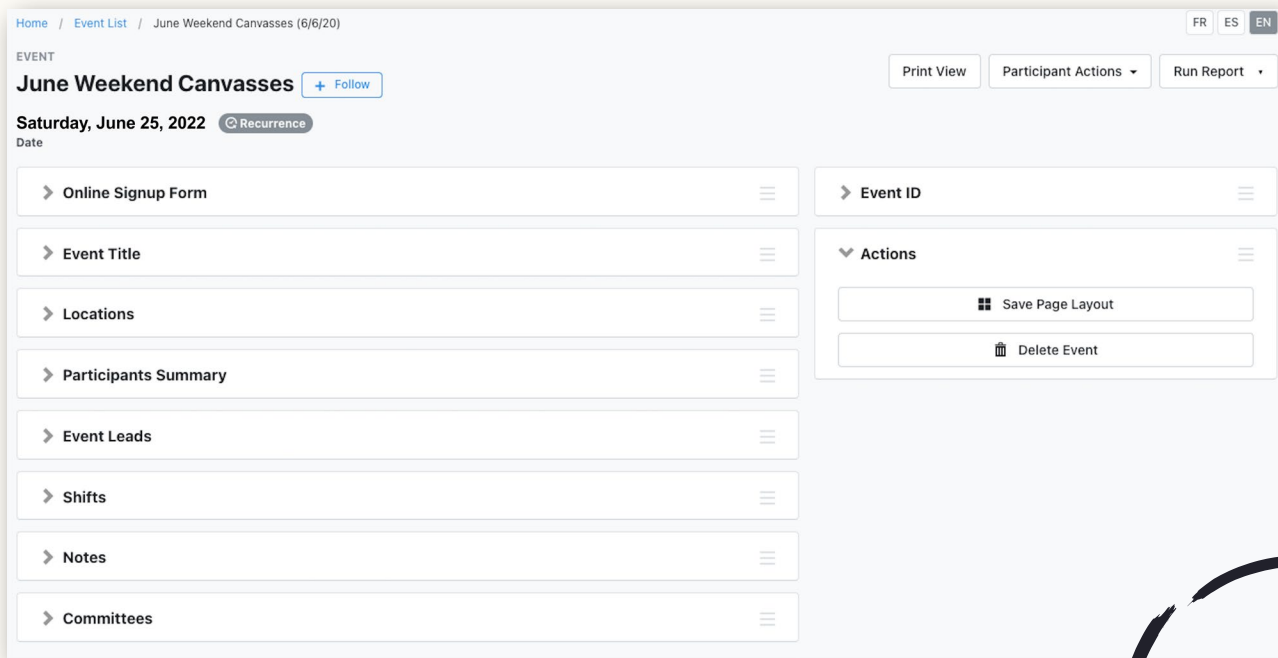
The screenshot shows the event management interface for "June Weekend Canvasses" on Saturday, June 25, 2022. The interface includes a navigation bar with "Home", "Event List", and "Canvass (8/12/22)". There are language selection buttons for "FR", "ES", and "EN". Action buttons include "Print View", "Participant Actions", and "Run Report". The main content area is divided into two columns. The left column contains a table for the "Online Signup Form" and several expandable sections: "Event Title", "Locations", "Shifts", "Event Leads", and "Participants Summary". The right column contains an "Event ID" section and an "Actions" section with buttons for "Save Page Layout" and "Delete Event".

Status	Form	
Published	June Weekend Canvasses <a href="https://secure.ngpvan.com/_m5ZUL128UGbmQb8Fak5dA2">https://secure.ngpvan.com/_m5ZUL128UGbmQb8Fak5dA2</a>	<a href="#">Edit</a> <a href="#">Build Supporter Group Form</a> <a href="#">Deactivate</a>



## Edit and monitor event

Once the event is published, organizers can access the back end (to edit and track RSVPs) by selecting it from the **Calendar** or **Event List** (both are accessible from the **Main Menu's Events** panel).



## Event Attendee Check-In

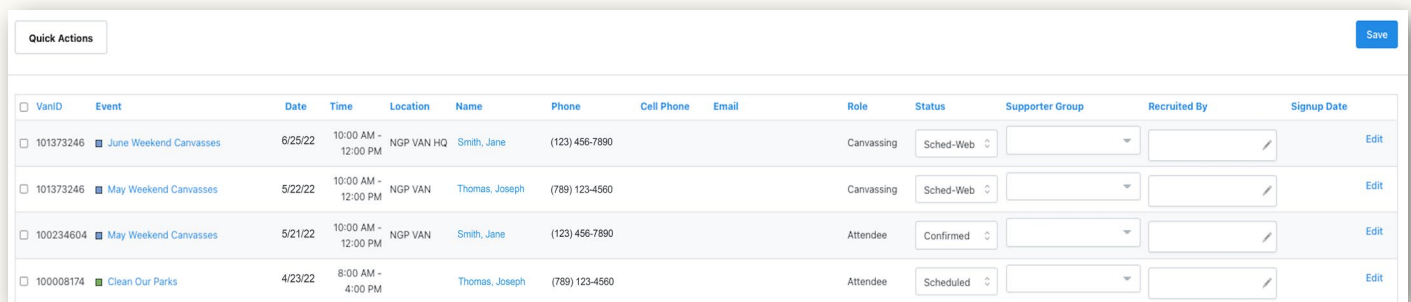
The **Event Attendee Check-In** (located under the **Engagement** header in the sidebar) allows you to easily check attendees in from your phone or laptop. You can also easily close shifts for attendees.

## Event Participant List and Event Participant Report

The **Event Participant List** allows you to easily see and filter event participants. You can also change the status of attendees and re-shift attendees from this list. The **Event Participant Report** allows you to see and filter participant activity within a time frame you select.

## Pro-Tip | Close your shifts

Select **View All Participants** under **Participants Summary**. To update an individual participant's status, simply select from the **Status** drop-down menu. To update multiple participants at once, select them by checking the boxes before their records, and then choosing **Quick Actions > Update Status**.



<input type="checkbox"/>	VanID	Event	Date	Time	Location	Name	Phone	Cell Phone	Email	Role	Status	Supporter Group	Recruited By	Signup Date
<input type="checkbox"/>	101373246	June Weekend Canvasses	6/25/22	10:00 AM - 12:00 PM	NGP VAN HQ	Smith, Jane	(123) 456-7890			Canvassing	Sched-Web			Edit
<input type="checkbox"/>	101373246	May Weekend Canvasses	5/22/22	10:00 AM - 12:00 PM	NGP VAN	Thomas, Joseph	(789) 123-4560			Canvassing	Sched-Web			Edit
<input type="checkbox"/>	100234604	May Weekend Canvasses	5/21/22	10:00 AM - 12:00 PM	NGP VAN	Smith, Jane	(123) 456-7890			Attendee	Confirmed			Edit
<input type="checkbox"/>	100008174	Clean Our Parks	4/23/22	8:00 AM - 4:00 PM		Thomas, Joseph	(789) 123-4560			Attendee	Scheduled			Edit

## Event List

The **Event List** shows a summary of upcoming events, participant numbers, attendance status, and more! To access this page, on the **Main Menu** with **My Campaign** selected, find the **Events** panel and click on **Event List**. From this page, you can also access the Event Calendar, add a new event, or export your events into Excel. You can also click on the event name to go into the event itself to update information.

## Mobilize Integration

In addition to VAN's **Events**, Mobilize also seamlessly integrates with VAN and provides a great front door for new volunteers to join your campaign or cause. Mobilize also automates a lot of the actions organizers do on a daily basis (confirmation calls, reminders of upcoming events, etc.). By automating these actions, organizers can focus their time on other priorities like recruiting more volunteers or scheduling more shifts! [Learn more about Mobilize here.](#)

# Data Entry

While Virtual Phone Banks and MiniVAN offer the most efficient means of data entry by empowering volunteers to input data, you may still need to manually enter data into VAN.

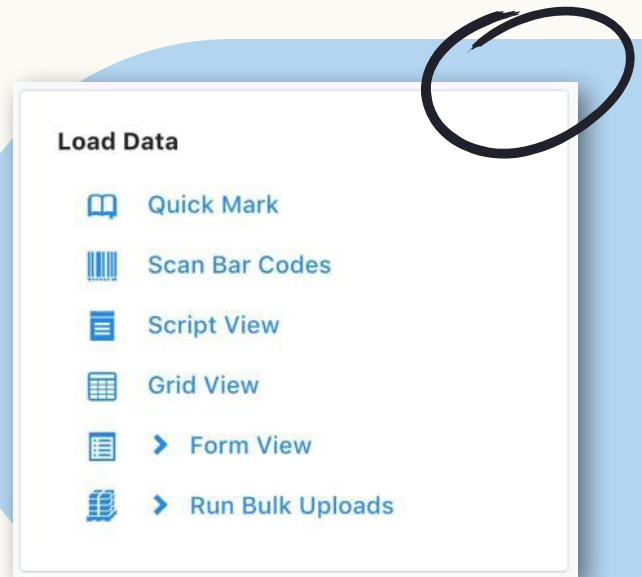
All of the following data entry options can be accessed on the **Load Data** panel on the **Main Menu**.

## Quick Mark

Similar to the Quick Look Up tool, **Quick Mark** allows you to look up individual voters. Quick Mark then allows users to add data, such as Activist Codes, Survey Questions, and Vote History to voter profiles.

### Choose data to apply

After entering **Quick Mark**, you will be prompted to choose the type of data that you want to apply to records. After selecting the category (such as Activist Code), you will be asked to select the specific code and information to apply to the records.



DATA ENTRY  
**Quick Mark**

**Step 1 of 2**

What do you want to do?

- Add a Survey Response
- Add an Activist Code
- Add a Contact Result Code
- Mark Bad Mailing Addresses
- Add to Organization
- Schedule for Event
- Schedule for Event (Using Event Scheduler)

[Next](#)

DATA ENTRY  
**Quick Mark**

**Step 2 of 2**

Select the data you wish to apply

Survey Question\*

When\* 8/10/22

Contacted By\* Huizinga, Ben

How\*

Campaign

[Previous](#) [Finish](#)

## Search for records

Similarly to using the **Quick Look Up** function, organizers can search for a profile using whatever contact information that they have. Once the correct profile has been found, simply check the **Activist Code** box in front of the voter's name and save.

CONTACTS  
**Quick Mark**  
Add a Contact Result Code

Last Name: Weiss | First Name: | Middle Name: | Nickname: | ID: VANID | VANID: |  
Street Address: | City/Town: | State: | Zip: | Country: |  
Email: | Country Code: | Phone: | County: |  
 Use SmartName search technology

Remember Filters | Clear | Save / Search

Control Panel  
Search My Voter File

Result Code	Name	Organization	Address	City	Country	Age	Phone	Email	Work Zip
<input type="checkbox"/>	Weiss, Joyce M		11560 Pumpkin Seed Ct	Orlando	United States	81	(555) 900-2221		

1 Person · 1 Page

## Grid View

The most common way to enter data from paper-based canvassing and phone banking events is **Grid View**. It offers a table-style interface where people from a selected list appear along with possible responses and Canvass Results from a designated Script.

DATA ENTRY  
**Grid View**

Which list do you want to use?

Use My List  
 Let me enter a List Number [ ] - [ ]  
 Use Quick Look Up

Next

## Select the List

Grid View data entry is always based on an existing list—you can enter the list number for turfs and call lists, use the **My List** currently loaded in VAN, or use **Quick Look Up**. For printed turfs and call sheets, the list number can be found at the bottom of the page.

Demo Turfs Turf 03 · List 23168377-93962 · Page 1



## Enter responses

Records will be displayed in the same order that they are on the printed lists for easy entry. Enter Canvass Results, responses to Survey Questions, Event responses, or apply Activist Codes (whatever fields are included in the script applied to the list will be editable in Grid View).

Home / Grid View FR ES EN

DATA ENTRY

### Grid View

Records: 141 - 160 of 2,500

Back Clear Print Save Next

Contacted By: Huizinga, Ben  Date: 8/10/22  How: Phone

Name	Address	City	State/Province	Zip/Postal	Country	Party	Age	Phone	Result	Contacted By	Park Cleanup	FixPrk
Alexander, Marie D	6793 Sanddale Rd	MacClenny	FL	32063	US		68	(555) 510-1245	<input type="text"/>	Last Name, First Name <input type="text"/>	<input type="checkbox"/>	<input type="text"/>
Alexander, Matt R	7980 J D Higginbotham Rd	Glen St Mary	FL	32040	US		34	(555) 506-0980	<input type="text"/>	Last Name, First Name <input type="text"/>	<input type="checkbox"/>	<input type="text"/>
Alexander, Melissa K	447 East Blvd S	MacClenny	FL	32063	US		46		<input type="text"/>	Last Name, First Name <input type="text"/>	<input type="checkbox"/>	<input type="text"/>
Ali, Grace	8885 Fair Rd	Strongsville	OH	44149	US				<input type="text"/>	Last Name, First Name <input type="text"/>	<input type="checkbox"/>	<input type="text"/>
Allard, Kathy A	1029 Steel Bridge Rd	Macclenny	FL	32063	US	I	56	(555) 970-8415	<input type="text"/>	Last Name, First Name <input type="text"/>	<input type="checkbox"/>	<input type="text"/>

## Mark Remaining as Not Home

Typically, **Not Home** is the most common response for phone banks and canvasses, so rather than entering each individual instance into the grid, fill in all of the other responses, and then click **Mark Remaining Not Home** at the bottom left corner of the grid.

## Save progress

Once the list has been entered, click **Save** to finish. All of the data will now be available to view in VAN.

# Bulk Upload

Decide what type of **Bulk Upload** to perform. Your options vary depending on your package.

- **Load data with** allows you to match records using a VANID or other unique ID. Select this when updating existing records with unique record IDs.
- Load new and/or make changes to existing contacts allows you to upload new records or to match records based on values like **First Name, Last Name, Address, City, State, Zip, Email, and Phone**. This option is only available in My Campaign.

Before you upload your file, **carefully read the file requirements**. If the file name contains parentheses, you will need to rename it to upload.

With your data loaded into the bulk upload tool, select the columns from your spreadsheet you want mapped onto corresponding fields in the database. Each column you map from your upload to your records is listed individually as you move along. Edit or remove them as needed.

For the remaining columns that have not been automatically mapped to fields, you can select the relevant upload type from the drop-down. Then, choose to apply the same value to all records or apply values from a particular column in the file. To map a particular column, use **Choose Column from Data File** and select the column from the drop-down menu. You may be asked to fill out additional information depending on which field you are updating. Select **Save Mapping Template** if you are not ready to apply new data. Otherwise, double-check your work and select **Finish**.

In some cases, your upload may need to be approved by your administrator. If your file needs approval, you will see a notice under it.

You can also bulk update existing records from My List by selecting **Bulk Apply**.

*Pro-Tip* | **Bulk Imports may be available via API**

Some bulk uploads are available via API as Bulk Imports. [Learn more about this process.](#)



# Reporting

## Report Manager

**Report Manager** allows users to pull data easily from VAN with templated reports such as Event Participant Report, Contact History Report, Survey Question Report, and Activist Code Report.

## Counts and Crosstabs

**Counts and Crosstabs** allow you to analyze data by comparing various data points. For example, you can view a target universe by age and city. This tool is particularly helpful in deciding how to target various subgroups of contact records.

There are two ways to access **Run Quick Counts and Crosstabs**. The first is from the **My List** page. If you have created a list of records for which you'd like to analyze with **Counts and Crosstabs**, you can click on the **Counts** icon on the **My List** page.

To begin the alternative workflow, which is best to **Run Quick Counts and Crosstabs** on the **entire database**, go to **Report Manager** from the **Main Menu** (or sidebar).

Once in **Report Manager**, click **Counts and Crosstabs** in the left-hand side menu. Then click on **Run Quick Counts and Crosstabs**.

Select fields for **Crosstabs** and **Columns**. The fields available include geographic regions, age, sex, **Activist Codes**, and **Survey Questions**. Once **Refresh Results** is clicked, the counts appear below.

You can also **Run Counts and Crosstabs with Formats** which allows user to create default settings for this report. Counts and Crosstabs Formats allows you to use an expanded number of data points such as Survey Questions, Master Survey Questions, and Activist Codes. Formats can be shared with other users. Sharing formats ensures that everyone should be looking at the same report, assuming they have access to the same records and data in the system.

You can create **Counts and Crosstabs Formats** and schedule them to send to you at any interval you wish.

# GOTV Tools

Get out the vote (GOTV) is the time when you dedicate as many resources as possible to help drive out votes for your candidate. It's why we developed tools to help your volunteers be more efficient and help your campaign focus time on the voters you still need to turn out during GOTV.

## How to use absentee and early voting data

Absentee and early voting data is updated periodically by your admin. Updates occur at a different intervals due to a variety of factors in each state. Reach out to your admin to learn about the cadence of updates in your state. Once this data is available, **there are a few actions you can take:**

If you click the boxes to **Exclude anyone who has Early Voted or Absentee Voted** while creating a **List** under the **Early Voting** drop-down or while creating a **Virtual Phone Bank**, these voters will be removed from your lists so your volunteers can focus on connecting with voters who still need to vote. MiniVAN automatically checks for people who have voted early or absentee and displays a "Voted" icon next to those voters in the app. You can also **Exclude anyone who has voted on Election Day** when you are running GOTV efforts on Election Day.

## Early vote locations

Early vote locations are shared across committees and can only be uploaded by the VAN Data Team. Early vote location data varies by state, so VAN has been built to accommodate the most common set of fields available, including location name, address, phone number, hours, and exceptions. These fields are available for inclusion in Open Virtual Phone Bank, Virtual Phone Banks, PDF Print Reports, Standard Text Exports, and MiniVAN.

VAN also supports any political boundary for early vote locations that correspond with an existing district in the state. In Create a List, under the Early Voting drop-down, users can include people within a certain proximity from the nearest early vote location if you want to contact people who live close to an early voting location to vote.

## Polling locations

The editable list of Polling Locations and associated information is accessible from the left-hand section of the **Main Menu**, or by typing **Polling Locations** into the sidebar. Access to this page is limited to users with the **View Polling Locations** security function. Once polling locations are uploaded, you'll be able to include that information in MiniVAN, Virtual Phone Bank, OpenVPB, and printed walk and call sheets.

If you have questions about early voting locations or polling locations, please reach out to your admin.

### Bulk upload polling locations

The option to Upload Polling Locations appears in the first step of the Bulk Upload Wizard to users with the **Upload Polling Location Info** security function.

The Polling Location Bulk Upload requires that the first column of your file contains VAN PrecinctIDs. Note that the workflow is slightly different from the workflow for bulk uploading lists of people.

Each Polling Location batch displays two rows per polling location. The first row shows the current polling location, and the second shows the changes that will be applied when the batch is approved and processed.

Polling Location Bulk Upload Batches need to be reviewed and approved by a user with the **Approve & Edit Polling Locations Info** security function before they begin processing.

## How to enable early voting and polling location fields in VPB & MiniVAN

When creating a **Virtual Phone Bank** or **MiniVAN campaign**, you can easily enable early vote locations to display by clicking the checkbox next to **Early Vote Location** under the **Additional Contact Details** drop-down on the right side of VAN. You can also select different Early Vote information under the **Contact & Location** drop-down. This selection will allow volunteers to direct people to Early Vote Locations close to them during their calls or canvasses. You can also check the box next to **Polling Location** to add those into your phone bank or **MiniVAN** display.

### *Pro-Tip* | Remove voters who have already voted

If you've selected to exclude people who have already voted, your walk lists and call lists will shrink as VAN removes voters who have already cast their ballot. This allows you to focus on voters who have yet to vote, but it may also mean you move through lists faster than expected!



Every time a canvasser syncs, the updated list of people who have been marked as voted is sent to **MiniVAN**. Canvassers will see a “Voted” sticker next to voters/ households who have already voted, so canvassers can skip households during GOTV that have already cast their ballot.

For printed lists, VAN has a built-in tool that makes it easy to strike (or remove) voters from lists. This tool will help campaigns perform absentee ballot chases without having to print lists over and over. Enter the tool by clicking **Strike People From a Printed List** in the **GOTV** panel on the **Main Menu**.

Enter your **List Number**, which is the 11-digit number in the footer of your printed report. Click **Refresh**. Your list appears on screen, with a column indicating who has voted. Select the records you would like to strike from your list. Note: This will remove voters from only the list you entered. They will still appear on other lists if you don't intentionally exclude them.

## Printing and polling locations

Polling Locations can be included in PDF Print Reports in two ways.

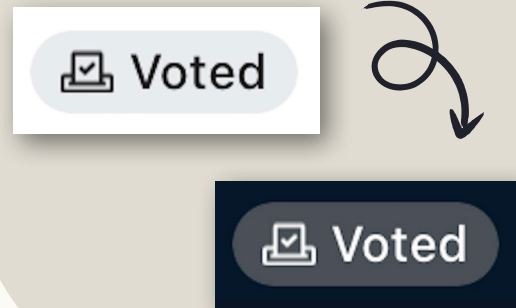
First, they can be included in the header of each page of your print report, as long as Precinct is included in the Sort Order, Page Breaks, and Group Header of your report's print settings.

This assumes that you are calling or walking a list of people who are in the same precinct, thus the Polling Location is the same for all of the people on that page of the list.

Polling Location fields can also be included in Report Formats by selecting the polling location fields. Note that the fields are quite long, and inclusion here may limit the space available for your script.

This option is best to use when you are creating a list where you don't care or don't want to have to sort and page break by precinct, but still want volunteers to have access to this information for each person they are speaking to.

MiniVAN works in dark mode too!



# Moving data between My Voters and My Campaign

## VAN Relay

VAN Relay helps you automatically incorporate information available in My Voters to your records in My Campaign. If you enter data in one instance (My Voters or My Campaign), it will search the other database to find a match and automatically add the information available on that contact. The data that moves is date of registration, party, registration status, date of birth, vote history (even-year primary/general elections only), and scores (upon request and admin approval). Linked records will display Activist Codes or Survey Questions applied in the other database tab, provided that the committee, Survey Question and/or Activist Code is/are in both databases. Addresses, phone numbers, and emails are not moved.

## Auto copy to My Campaign from email addresses and Survey Question responses

There are many ways to move data from My Voters to My Campaign. It is possible to do this automatically in a few ways. Talk to your admin about setting up these automations.

- **Auto copy from email address**

If enabled, when a new email address is added to a Voter File record, the record will automatically be copied from My Voters to My Campaign. That way, if you collect an email address, they will be automatically moved into My Campaign for additional follow up.

- **Auto copy from Survey Question response**

If enabled, voters with certain Survey Question responses applied will be auto-copied to My Campaign. This means you can automatically copy your strong supporters into your My Campaign database. Admins can designate which Survey Question responses trigger copying the record into My Campaign.

# Requesting help and support

After getting into VAN and/or reading the VANual, you may have additional questions that you want answered. In VAN, there are three ways that you can ask for help!

## 1 **VAN Help Center**

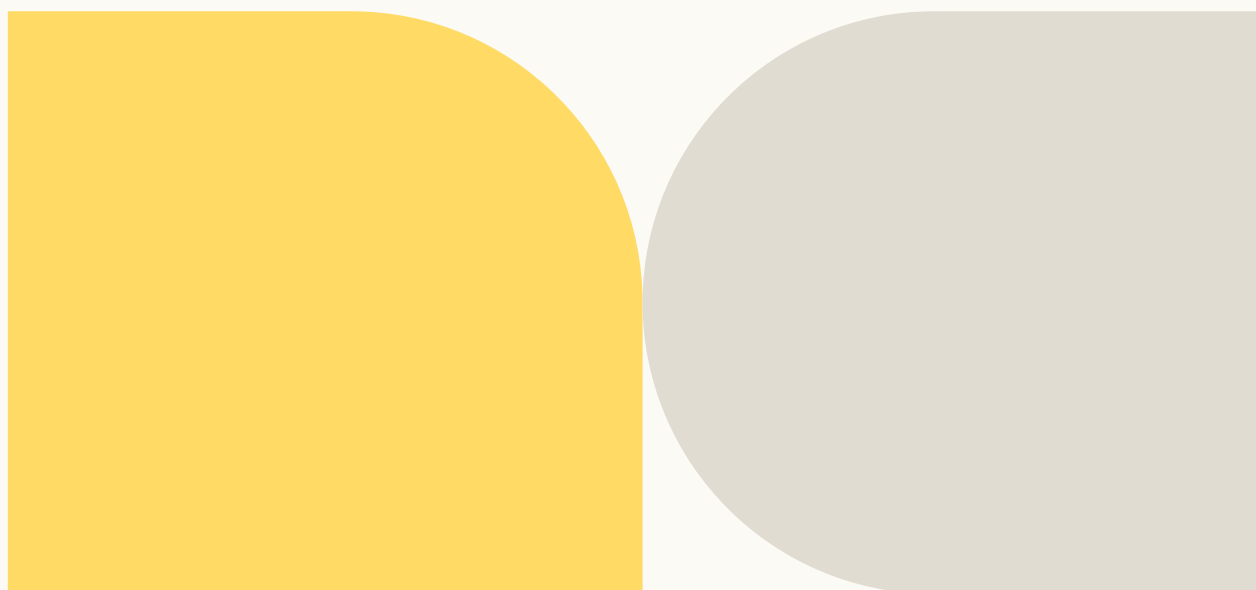
The [VAN Help Center](#) is a database of existing help documents that are accessible to all users. The Main Menu of the Help Center offers easy navigation to read about new features, starting in VAN, accessing the training library and success guides, and searching for more information.

## 2 **Submit a support request**

Submitting a support request initially routes your request to your state administrator(s) where it can be elevated to our product support team to help resolve issues. If you do not see the ability to submit a support request, reach out to your state admin.

## 3 **Send product feedback**

If you have ideas for how we can make VAN better, we would love to hear them! We are always working to make our product stronger and user feedback helps us do that.





# Glossary

**Activist Code:** Tags created by users to track constituency groups.

**Branched Script:** Scripts to provide volunteers with different script paths to address different scenarios. Only available on OpenVPB and MiniVAN.

**Canvass Results:** Voter contact disposition options for contact that did not result in a survey, including Not Home, Moved, Inaccessible, Deceased, etc.

**Dashboard:** An overview page for users, providing a snapshot of their organizing reports and shortcuts to commonly used features.

**Distributed Contacts Campaigns:** MiniVAN lists that are automatically distributed based on your canvasser's location.

**Grid View:** A data entry form used to enter multiple Survey Question responses associated with a list created in VAN. This is the most common way to enter large amounts of canvassing or phone banking data.

**Event Scheduler:** A tool that enable callers to schedule contacts for upcoming events.

**Linear Script:** A simple script with one path that usually meets the needs of most campaigns.

**Lists:** User created groups of voters based on selected criteria such as geographic location or voting status. Lists are commonly assigned to a phone bank or canvass, and can also be saved, shared, and exported.

**MiniVAN:** NGP VAN's sophisticated mobile canvassing tool, allowing volunteers to receive turf and enter data on their smartphones rather than paper and clipboard packets.

**My Campaign:** The volunteer management side of VAN, that contains user-added records for volunteers and activists.

**My Voters:** The voter file side of VAN, that houses records for every registered voter in the state. This data is collected from the Secretary of State and past campaigns.

**OpenVPB:** A tool that allows anyone to make calls from wherever they are without needing a user account created.

# Glossary (cont.)

**Quick Look Up:** The tool for quickly finding and accessing a voter's record by searching based on known contact information such as name, address, phone number, etc.

**Quick Mark:** A data entry tool for applying a single Survey Question or Activist Code to multiple records which are not associated with a list.

**Scripts:** Combinations of text, Survey Questions, Activist Codes, or Event invitations, created by users to be displayed on walking/calling lists or on VPB/MiniVAN pages.

**Street Team Canvassing:** An add-on allows you to recruit supporters and collect data without a pre-defined list using MiniVAN.

**Survey Question:** Tags created by users to track voters' or volunteers' responses to multiple choice questions.

**Teams and Divisions:** A data attribution tool to ensure accurate correct attribution.

**Turf:** A group of voters from a list that have been cut into a map region for canvassing.

**Turf Cutter:** A tool that allows users to view a map of the distribution of voters in their list, draw lines around groups of voters to place them in turfs, and print those turfs.

**User:** An account with access to various functions of VAN. While each registered voter has a profile in VAN, only people who have been given accounts by a campaign have User profiles.

**Virtual Phone Bank (VPB):** A paperless phone banking system, in which callers view and enter information on computers while calling.

**VPB Connect:** An add-on that allows callers to click to dial from their computers.

**Voter Profile/Record:** A unique record that contains all of the information that has been collected about each voter, including contact info, polling place, and contact history.

# Appendix

## Paper Calling and Walking Lists

While Virtual Phone Banks and MiniVAN save campaigns hours of data entry and provide a more efficient platform for volunteers in different locations to easily make calls and knock doors, some campaigns may choose to use paper lists. **Here's how you can print those lists:**

### Select the Print option from My List

#### Select the appropriate report format

VAN is populated with default Calling and Walking List template, but campaigns can also create custom forms to fit their own needs.

#### Customize your document

After selecting the Report Format, organizers will choose a variety of other customization options—adding the script, determining the sort order for the records that will be printed, and excluding people who have voted early.

#### Save as a PDF

When all fields have been selected, clicking **Next** will generate a PDF Calling or Walking List which can be accessed through **My PDF Files** through the **Message Center**.