

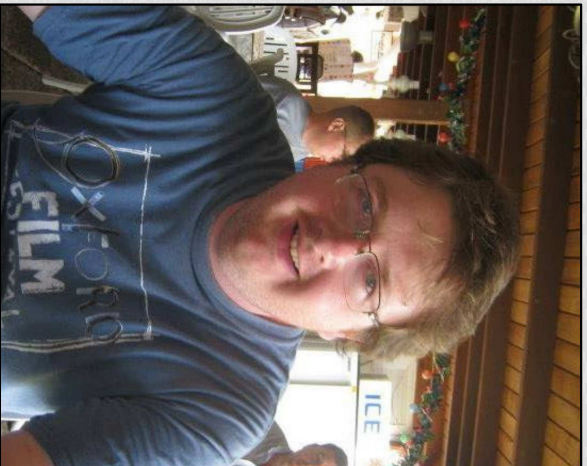
# Putting the Voterfile to work



**Paid for by Democracy for America, [www.democracyforamerica.com](http://www.democracyforamerica.com), and not authorized by any candidate or candidate's committee.**

# Meet your trainers

**Mudcat Arnold**



@mudcatarnold

**Monique Teal**



@TealBomb  
(802) 651-3217

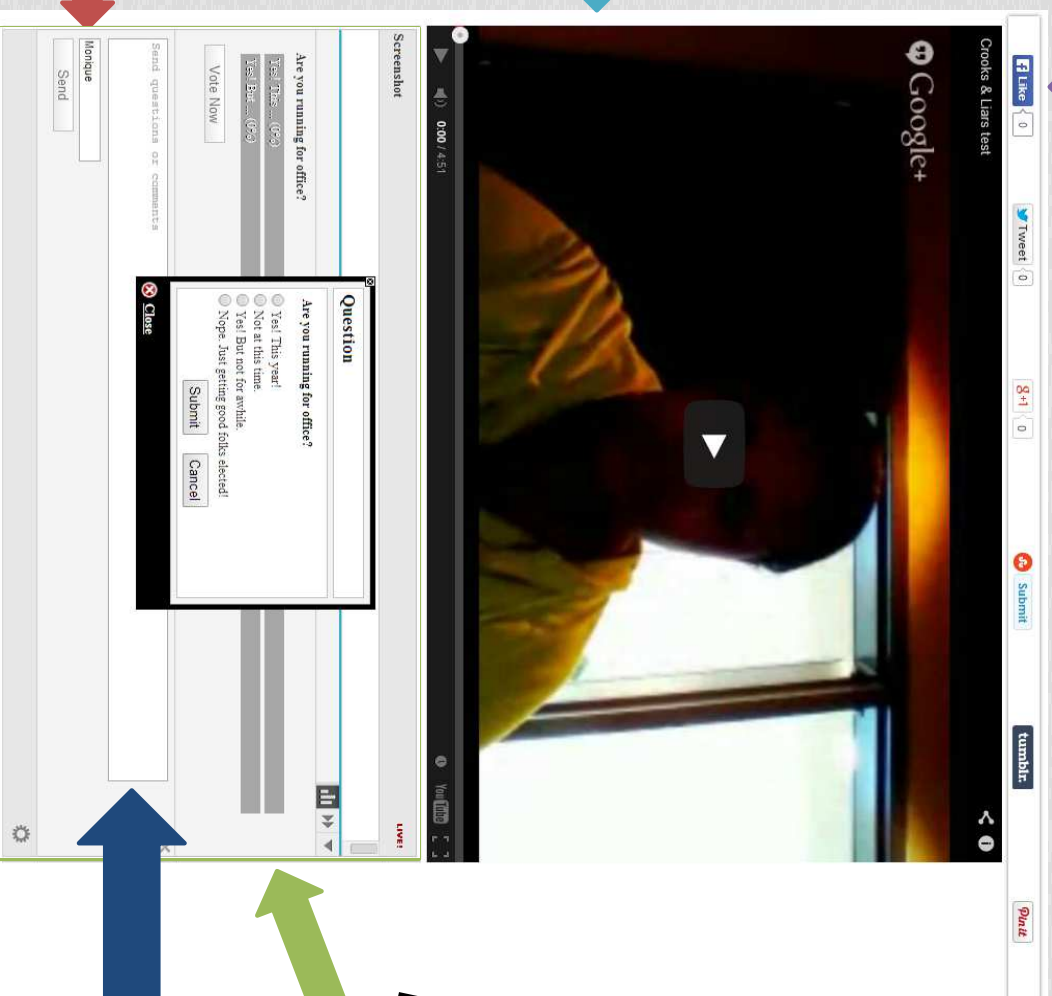
[mteal@democracyforamerica.com](mailto:mteal@democracyforamerica.com)

# Training Logistics

Be Social!  
facebook.com/dfaaction  
@DFAaction  
#DFANightSchool

The live  
training.

Tell us who  
you are!



See questions &  
comments from the  
DFA community.

Type your  
questions &  
comments here.



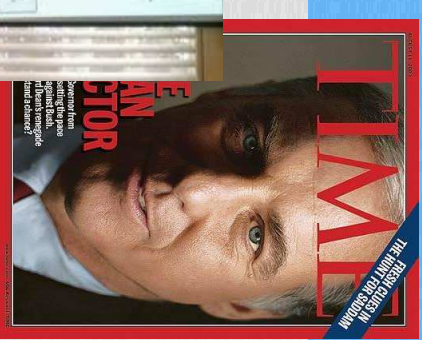
# Who We Are

## Democracy for America

- Founded in 2004 by Gov. Howard Dean
- People-powered political action committee
- Dedicated to changing the Democratic Party from the ground-up

## Night School

- More than 40,000 trained since 2006!
- Elect & develop progressive voices

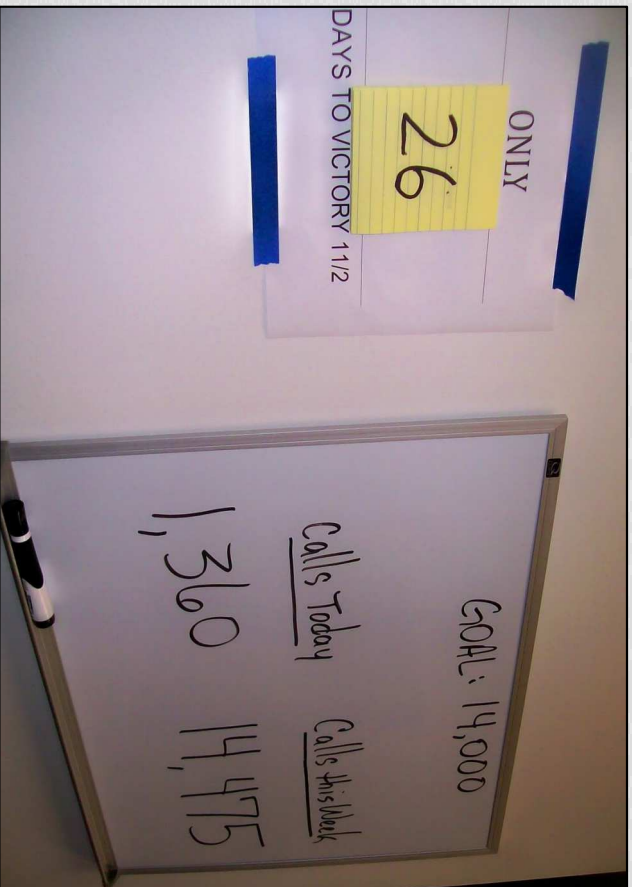


# What is the Voterfile?

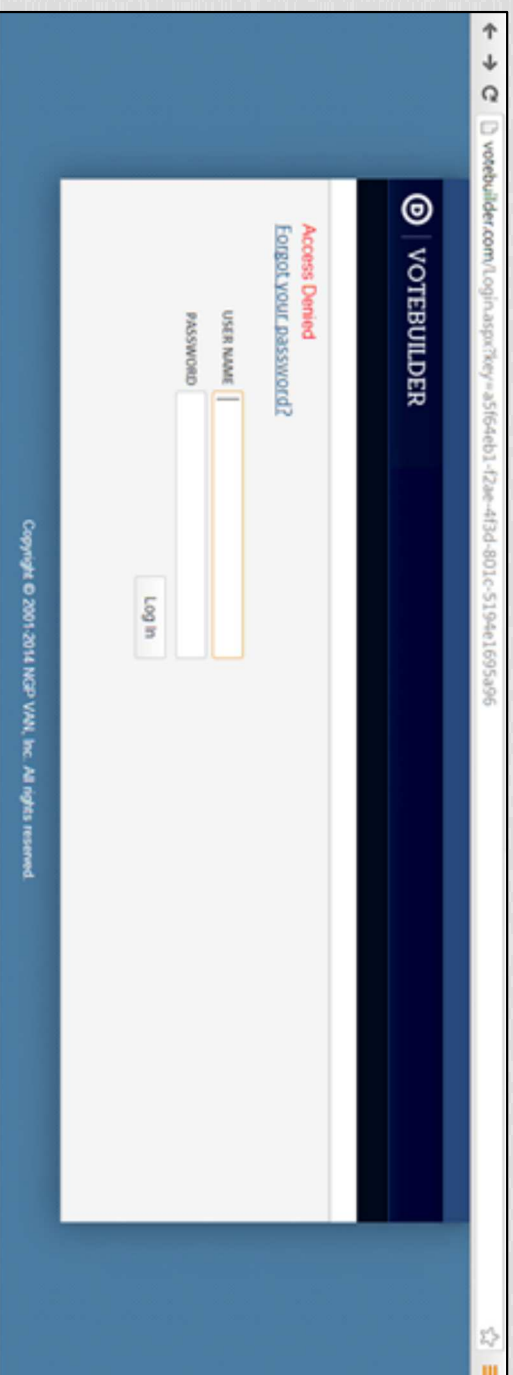


- ★ VoteBuilder is the online database which holds all of the registered voters in your state.
- ★ VoteBuilder users can

- find information about individual voters,
- identify groups of likely voters and turn those groups into walk or call lists,
- enter the data from those completed lists
- track and manage volunteers.



# Gaining access



VoteBuilder is operated by your state party in partnership with the Democratic National Committee (DNC).



# Home Page



My Voters is where you go to print out call and walk lists of voters.

My Campaign is where you go to manage volunteers.

Quick Look Up is an easy way to look up one person at a time

Note: You may see more, fewer, and/or different icons on the front page.

# Pulling a list

**Create A New Search**

Step 1: (Start with anyone who meets the selected criteria)

★ Favorites

- > Location
- > Activist Codes
- > My Saved Lists
- > Survey Questions
- > Voting History
- > Canvass Status

Exclude people based on the following canvass results:

<input type="checkbox"/> Busy	<input checked="" type="checkbox"/> Do Not Mail	<input type="checkbox"/> Not Home
<input type="checkbox"/> Call Back	<input checked="" type="checkbox"/> Do Not Walk	<input checked="" type="checkbox"/> Other Language
<input checked="" type="checkbox"/> Canvassed	<input checked="" type="checkbox"/> Inaccessible	<input checked="" type="checkbox"/> Refused
<input checked="" type="checkbox"/> Deceased	<input checked="" type="checkbox"/> Left Message	<input checked="" type="checkbox"/> Spanish
<input checked="" type="checkbox"/> Disconnected	<input type="checkbox"/> Mailed	<input checked="" type="checkbox"/> Vacant
<input checked="" type="checkbox"/> Do Not Call	<input checked="" type="checkbox"/> Moved	<input checked="" type="checkbox"/> Wrong Number

Input Type: [Dropdown] Any Pass: [Dropdown]

Contact Type: [Dropdown]

Canvassed By: [Dropdown]

Date Entered: [Dropdown] To: [Dropdown]

Date Entered: [Dropdown] From: [Dropdown]

Canvassed: In the past [Dropdown] Days

Committee: [Dropdown]

From: [Dropdown] To: [Dropdown] Occurrences: [Dropdown]

Other Search Criteria

> Address Types

Registration  
Registration Status = Registered Active or Registered Inactive

Refresh Step

Preview My Results

Q -- People

Add Step ▼

Run Search →

Running this search will clear your current list of 130 people.

After creating the search, click "Run Search" to be taken to the list.

1. Create New List
2. Select your country.
3. Select the precinct you wish to call, or search by zip code or city.
4. For phone lists, select 'phones only' under 'phones – E-mails on the right hand side of the page.
5. Click search.



# Pulling a list

When you are in the 'my list' menu, click print at the far left of the bar on the top of the page.

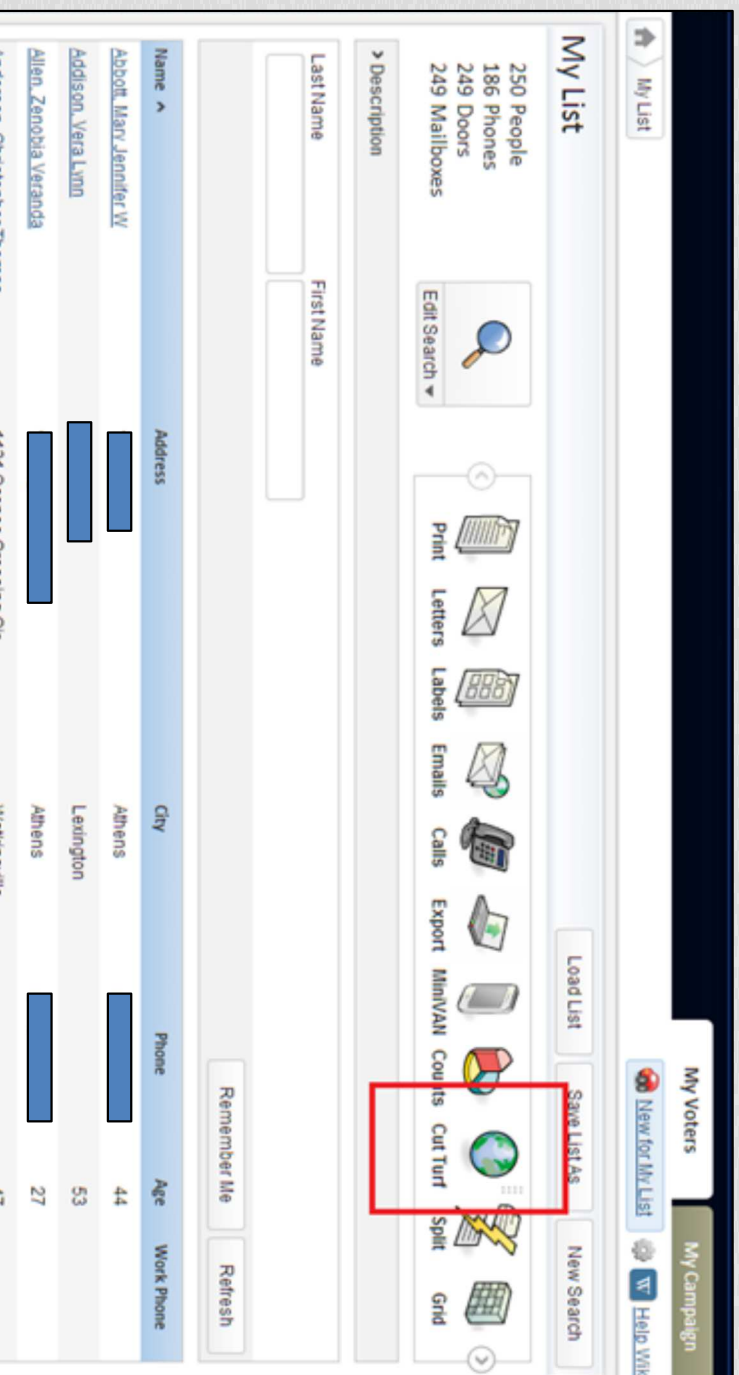
- a. Report Format: Can be personalized by your administrator
- b. Script: Will be personalized by your administrator
- c. Source: Select 'calling' or 'walking' as appropriate.

The screenshot shows a web application interface for a 'My List' menu. At the top, there are statistics: 100 People, 84 Phones, 100 Doors, and 100 Mailboxes. A red arrow points to a 'Print' button (represented by a printer icon) which is highlighted with a red box. Other buttons in the top bar include 'Letters', 'Labels', 'Emails', 'Calls', 'Export', 'MiniVAN', 'Counts', 'Cut Turf', 'Split', and 'Grid'. Below the top bar, there are input fields for 'Last Name' and 'First Name', and buttons for 'Remember Me' and 'Refresh'. The main content area is a table with columns: Name, Address, City, Zip, Phone, Age, Work Phone, Likely Party, and County. The table lists several individuals, including Danny Robert, Steven Michael, Matthew Michael, James E., Miranda Nicole, Charles T II, Nathan Daniel, Marsha R, Nashon Nicole, Darrell Newt, Richard Ornel II, Stuart M, Micheline Louise, Penny Lynn, Charles Steven, Catherine, and Keill.

Name	Address	City	Zip	Phone	Age	Work Phone	Likely Party	County
Danny Robert		Bowdon	30108		61			Carroll
Steven Michael		Powder Springs	30127		46			Cobb
Matthew Michael		Cumming	30040		33			Forsyth
James E.		Coyne	30084		92			Rockdale
Miranda Nicole		Covington	30016		26			Newton
Charles T II		Powder Springs	30127		54			Cobb
Nathan Daniel		Lecust Grove	30248		29			Henry
Marsha R		Athens	30605		68			Clarke
Nashon Nicole		Decatur	30035		36			De Kalb
Darrell Newt		Smyrna	30080		61			Cobb
Richard Ornel II		Marrietta	30064		66			Cobb
Stuart M		Atlanta	30319		50			Fulton
Micheline Louise		Marrietta	30066		53			Cobb
Penny Lynn		McDonough	30253		32			Henry
Charles Steven		Johns Creek	30022		59			Fulton
Catherine		Zebulon	30295		71			Pike
Keill		Roswell	30075		34			Fulton

# ARMY QUESTIONS

# Cutting Turf

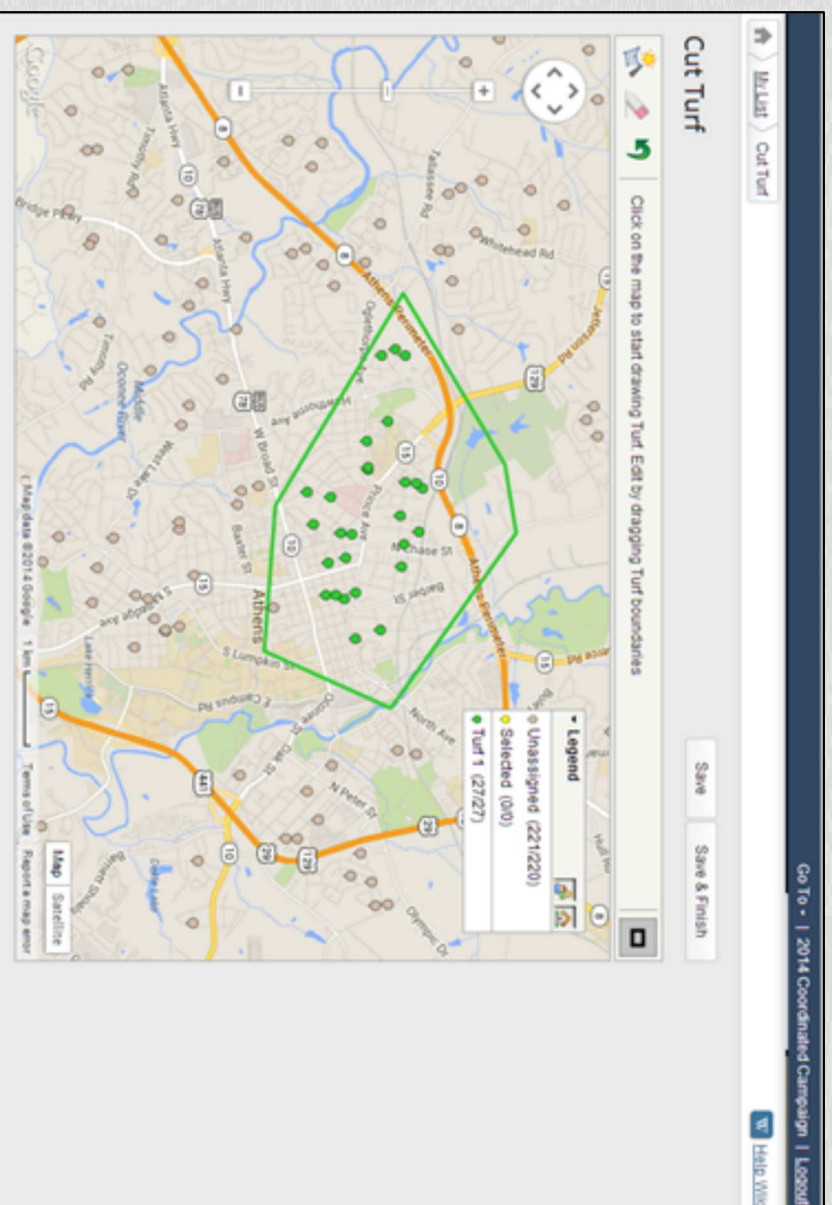


After you've created your list, click on the "Cut Turf" icon

## TIPS FOR GOOD TURF

- ★ 200 doors to a packet for 2 people.
- ★ Never cross major highways or bodies of water in a single turf.
- ★ Constrain a single turf to approximately four square miles.
- ★ Cut turf at 3x zoom, at approximately 200m per square inch.

# Cutting Turf



→ When in the Turf Cutter tool, create turf polygons around the houses represented on your list.

→ Click save after each polygon is completed. When all of the appropriate houses are turfed, click “save and finish.”

# Printing Walk Lists

**Print**

Home My List Print Help Wiki

Report Format: Walking List w/Likely Party

Script: Walk

Contacted How: Walk

Title: My List

Clear Sort Order

Sort Order1:  Ascending  Descending  Show Group Header  Page Breaks

Sort Order2:  Ascending  Descending  Show Group Header  Page Breaks

Sort Order3:  Ascending  Descending  Show Group Header  Page Breaks

Sort Order4:  Ascending  Descending  Show Group Header  Page Breaks

Sort Order5:  Ascending  Descending  Show Group Header  Page Breaks

Sort Order6:  Ascending  Descending  Show Group Header  Page Breaks

Sort Order7:  Ascending  Descending  Show Group Header  Page Breaks

Header Style:  Single Row  Multi Row  Include Field Labels

Print Last Name Range  Print Address Range  Do Not Print Range

Print People

Print Map

Print Footer (List Number, Page Number, and Date Generated)

Print Early Vote Location Cover Sheet

Print Two Copies of Cover Sheet

Exclude Anyone Who Has Early or Absentee Voted

Exclude Anyone Who Has Voted on Election Day

Format for Clipboard

Next

→ Print from the folder using the Print Region function.

→ The print button will ship the file to PDF. Download the PDF and ship it to print. We print turf in Landscape View.

# Data Entry

There are two main methods of data entry: Grid View and Bar Codes.

Scan Bar Codes  
Step 1 of 2

Mode  
 Scan Script Data  
 Scan Neighbor Relationships  
 Scan VANID Data

Sort  
4/14

Data Canssers  
Last Name, First Name

Contacted How  
 Result First then Names  
 Name First then Results

Previous Next

**SAVE AFTER EVERY COMPLETED PAGE. IF YOU DO NOT, VOTEBUILDER WILL LOSE YOUR DATA.**

Grid View

Records 1 - 20 of 100

**Enter VANID of the voter at the top of your list print-out to be brought to the correct page.**

**Change the "default" canvasser here.**

**Save often!**

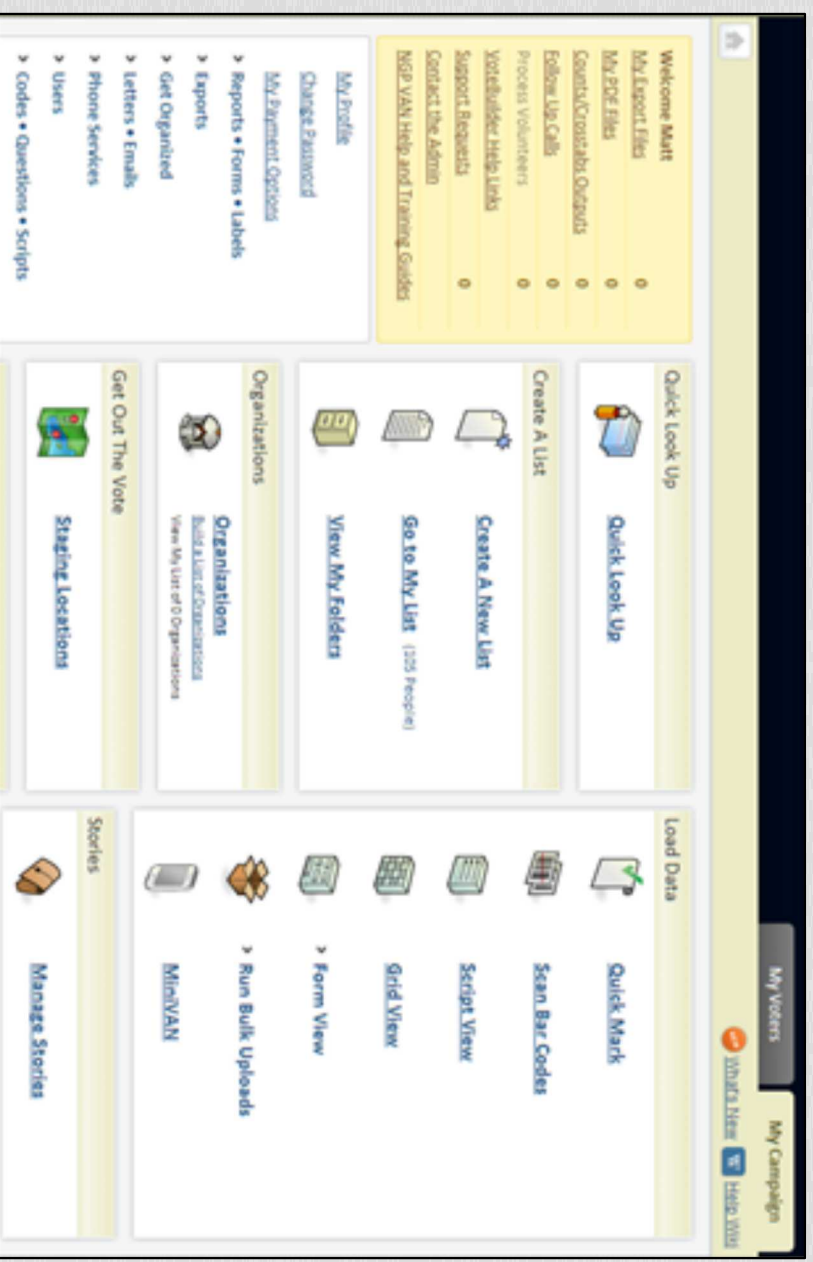
VANID	Name	Address	City	Party	Age	Power	Krust	Canssiter	Cobb VT	INCOBY
	Williams, Richard		Shenfile	U	52			Last Name, First Name		
	Koster, Megan Jane	30 Rd	Swanton	U	28			Last Name, First Name		
	Mason, Donna Marie		Burrville	U	60			Last Name, First Name		
	Mason, Michael Keith		Burrville	U	50			Last Name, First Name		
	Smith, Marcos Benjamin		Pentstoke	U	42			Last Name, First Name		
	Jones, Crystal Nicole		Lamrockville	U	39			Last Name, First Name		
	Anderson, Christi Rene		Ogden	U	33			Last Name, First Name		
	Harris, Edward James		Ogden	U	52			Last Name, First Name		
	Harris, Lynn Jackson		Ogden	U	49			Last Name, First Name		
	Hartzel, Barbara		Ogden	U	49			Last Name, First Name		
	Proctor, Thomas Everett		Ogden	U	45			Last Name, First Name		

# My Campaign

**Your list is only as good as the quality of your data entry.**

In My Voters, we mostly start with big lists and work backwards, narrowing and removing to get to our target list.

In My Campaign, it's best to prospect everything with an applicable tag.



# MyCampaign

## Adding Volunteer Shifts



You can schedule from the Quick Look Up Function.  
Enter the name of the volunteer.

2  
At this point, you can click on their name, and it'll pull up their volunteer record.

The screenshot shows the 'Quick Look Up' search form. The 'Last Name' field contains 'Volunteer'. Other fields include 'First Name' (Volunteer), 'Middle Name', 'Phone', 'DOB', 'ID', 'My Campaign ID', 'Street Address', 'City', 'Zip', 'Email', and 'County'. There is a checkbox for 'Use SmartName search technology'. Below the form are buttons for 'Remember Me', 'Clear', and 'Search'. A 'Control Panel' with a magnifying glass icon and the text 'Search My Voter File' is also visible. At the bottom, there is a table with one row: 'Volunteer, Volunteer' and a footer that says '1 Person · 1 Page'.



# MyCampaign

## Adding Volunteer Shifts

Event Signup Scheduler - Volunteer Volunteer

Use Ctrl or Shift key to select multiple dates  
Dates Selected: 1

March 2014

S	M	T	W	T	F	S
23	24	25	26	27	28	1
2	3	4	5	6	7	8
9	10	11	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	27	28	29
30	31	1	2	3	4	5

Apply Contact History  
Contacted By: Berger, Justin  
Contacted Date: 3/20/14  
Contacted How: Phone

Event Type: [dropdown]  
Event Name: [dropdown]  
Location: [dropdown]  
Roles: [dropdown]  
Within: [dropdown]  
Only Shifts at Staging Locations:

Type	Event	Date	Time	Location	Role	Status
<input type="checkbox"/>	March Day of Action (10a.m. - 12p.m.)	Sat 3/22	10:00 AM - 12:00 PM	Campaign HQ 1206 Spring St NW, Atlanta	Volunteer recruitment	Invited
<input type="checkbox"/>	Office work (Morning)	Sat 3/22	10:00 AM - 1:00 PM	Campaign HQ 1206 Spring St NW, Atlanta	Meet and Greet	Scheduled
<input type="checkbox"/>	Office work (Morning)	Sat 3/22	10:00 AM - 1:00 PM	Campaign HQ 1206 Spring St NW, Atlanta	Service activity	Tentative
<input type="checkbox"/>	Office work (Morning)	Sat 3/22	1:00 PM - 1:00 PM	Campaign HQ 1206 Spring St NW, Atlanta	Volunteer recruitment	Declined
<input type="checkbox"/>	Office work (Morning)	Sat 3/22	1:00 PM - 1:00 PM	Campaign HQ 1206 Spring St NW, Atlanta	Finance and	Confirmed
<input type="checkbox"/>	Office work (Morning)	Sat 3/22	1:00 PM - 1:00 PM	Campaign HQ 1206 Spring St NW, Atlanta	Finance and	Cancelled
<input type="checkbox"/>	Office work (Morning)	Sat 3/22	1:00 PM - 1:00 PM	Campaign HQ 1206 Spring St NW, Atlanta	Finance and	Completed
<input type="checkbox"/>	Office work (Morning)	Sat 3/22	1:00 PM - 1:00 PM	Campaign HQ 1206 Spring St NW, Atlanta	Finance and	Walk In
<input type="checkbox"/>	Office work (Morning)	Sat 3/22	1:00 PM - 1:00 PM	Campaign HQ 1206 Spring St NW, Atlanta	Finance and	No Show

Cancel Save Save and Close

3

Fill out this form with their activity.

# MyCampaign

## Adding New Volunteers

If a person is not a previous volunteer, you'll have to add them to my campaign.

Use the "Add New Person" box. You'll have to enter the person's information, then verify that you're not creating a duplicate record.

After that's created, build their volunteer profile by selecting the things that this person does and doesn't do in their profile.

### Quick Look Up

Use SmartName search technology

Last Name:  First Name:  Middle Name:  Phone:  My Campaign ID:  DOB:

Street Address:  City:  Zip:  Email:  County:

### Control Panel

First select a voter from the list below. If the person is not listed below, click here to add a new person.

	Name	Address	City	Age	Phone
<input type="radio"/>	Arnold, Matthew D	[REDACTED]	Cincinnati	32	[REDACTED]
<input type="radio"/>	Arnold, Matthew M	[REDACTED]	Bryan	50	[REDACTED]
<input type="radio"/>	Arnold, Matt A	[REDACTED]	Centerville	45	[REDACTED]
<input type="radio"/>	Arnold, Matt D	[REDACTED]	Athens	29	[REDACTED]
<input type="radio"/>	Arnold, Matt J	[REDACTED]	Springfield	27	[REDACTED]
<input type="radio"/>	Arnold, Matt R	[REDACTED]	Columbia Sta	23	[REDACTED]
<input type="radio"/>	Arnold, Matthew	[REDACTED]	Mineral Ridge	45	[REDACTED]
<input type="radio"/>	Arnold, Matthew	[REDACTED]	Lorain	38	[REDACTED]
<input type="radio"/>	Arnold, Matthew Aaron	[REDACTED]	Lebanon	44	[REDACTED]
<input type="radio"/>	Arnold, Matthew Alan	[REDACTED]	Cincinnati	25	[REDACTED]
<input type="radio"/>	Arnold, Matthew Brian	[REDACTED]	Mansburg	28	[REDACTED]

# MyCampaign

## Adding New Volunteers

After that's created, build their volunteer profile by selecting the things that this person does and doesn't do in their profile.

Save that profile.

After this profile has been created, you can book shifts in the same manner as an existing user.

► Main Menu ► Quick Look Up ► Matthew Arnold

**Matthew Arnold**

Form View | Print View | Script View

- Addresses
- OFA Region
- Salutation
- Phones
- Email
- Volunteer Profile
  - Attendee
  - Distribute Yard Signs
  - Prepare Mailings
  - Carvassing
  - General Office Work
  - Walk in Parades
  - Data Entry
  - Phone Calling
  - Write LTRs
- Also in Household
- Actions
  - Save All
  - Save Page Layout
  - Merge Duplicate
  - Create User Account
  - Delete Person
- Events
- Activist Codes

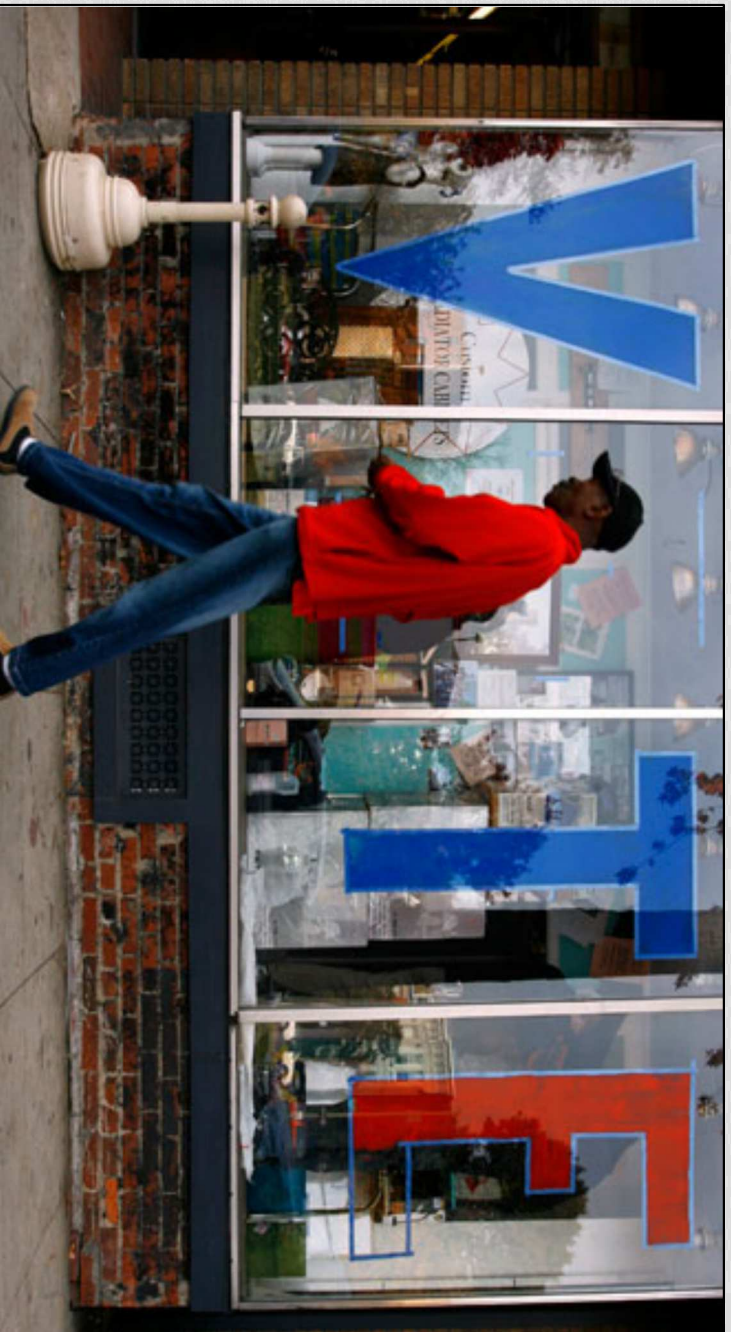
	Su	Mo	Tu	We	Th	Fr	Sa
Morning	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Afternoon	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Evening	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Active:  Save

# A Quick Note about the Virtual Phonebank tool

This tool allows a user to define a group of up to 20,000 voters and assign users to contact those voters from anywhere simply by logging in to the VAN and calling the voters on the list.

The Virtual Phone Bank tool is available in both the Voter File and My Campaign.



# ARMY QUESTIONS ?

# Thank you!

Contact your local party  
to find out how to gain  
VAN access.

Send questions to  
[training@democracyforamerica.com](mailto:training@democracyforamerica.com)

Coming up:  
Communications  
series

May 5th-8th  
6pm PT / 9pm ET

Check your email for  
registration!

[Democracyforamerica.com/training](https://democracyforamerica.com/training)  
[training@democracyforamerica.com](mailto:training@democracyforamerica.com)

**D** ★ **F** ★ **A** 

**NIGHT SCHOOL**