



# The Official MiniVANual

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



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

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# Table of Contents

|   |           |
|---|-----------|
| <b>Why MiniVAN?</b>   | <b>1</b>  |
| <b>Running a MiniVAN-first canvass</b>                      | <b>2</b>  |
| Quick start   | 2         |
| <b>Tips on running a mobile-first canvass</b>               | <b>3</b>  |
| <b>Preparing your canvassers to use MiniVAN</b>             | <b>4</b>  |
| Training materials  | 4         |
| Setting up a training area in your staging location         | 4         |
| What to include in your reminder email                      | 5         |
| Sending your canvassers out on the doors                    | 5         |
| Notifications   | 6         |
| <b>Create your MiniVAN campaign</b>                         | <b>7</b>  |
| What is a MiniVAN campaign?                                 | 7         |
| Link Scripts to your MiniVAN campaign                       | 8         |
| Creating Branched Scripts                                   | 9         |
| Advanced settings   | 11        |
| <b>Turf Manager</b>   | <b>12</b> |
| Printing your turf  | 13        |
| Push out lists in bulk                                      | 13        |
| <b>Commit and review results</b>                            | <b>14</b> |
| Commit your MiniVAN data                                    | 14        |
| Review your results   | 15        |
| <b>Distributed Contacts</b>                                 | <b>16</b> |
| Best practices: creating your Distributed Contacts campaign | 16        |
| Setting up Distributed Contacts                             | 17        |

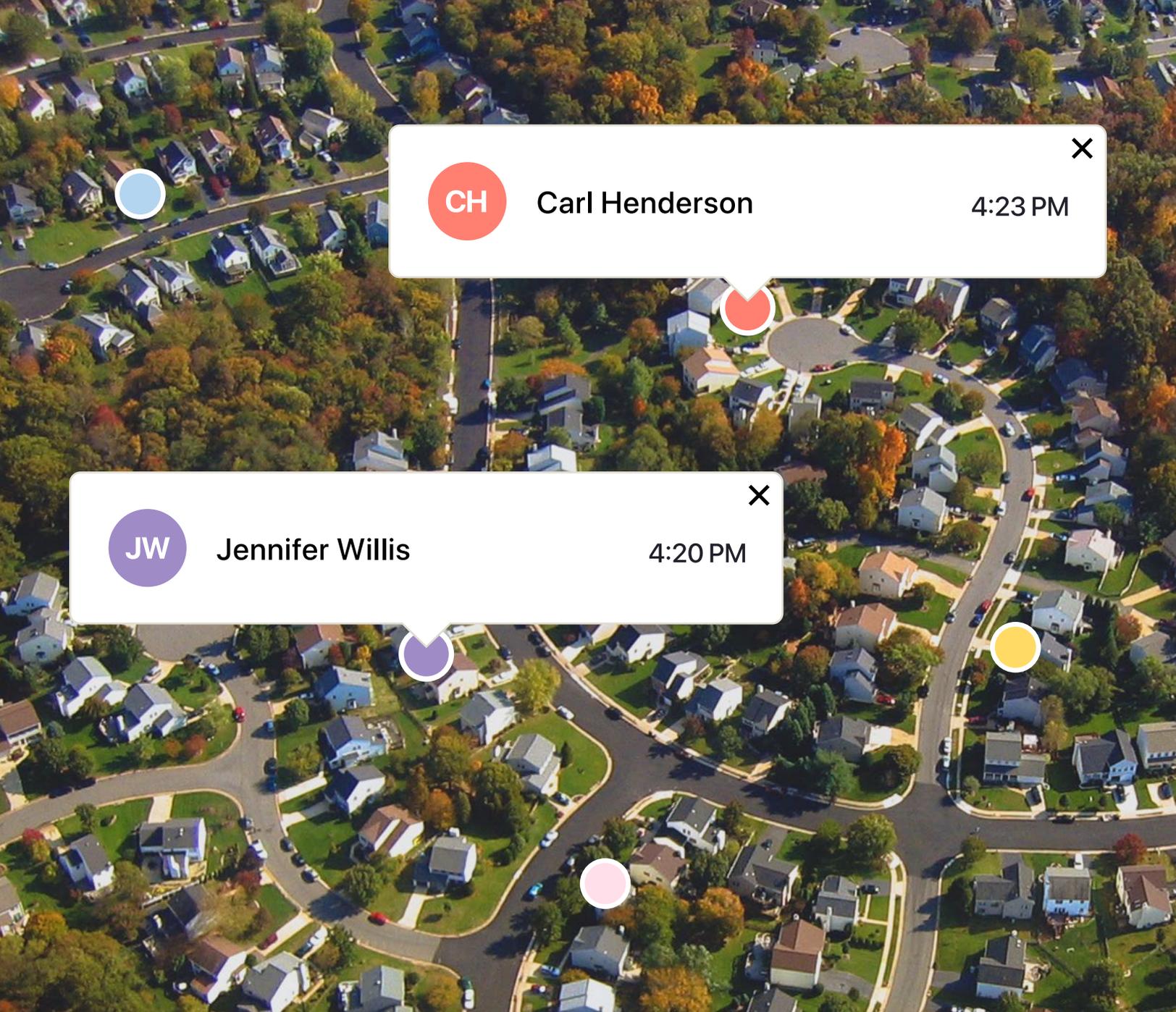
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# Table of Contents (cont.)

|  |           |
|--|-----------|
| <b>Editable Jobs (advanced feature for labor organizing)</b> | <b>19</b> |
| <b>MiniVAN Manager</b>                                       | <b>20</b> |
| Set up MiniVAN Manager                                       | 20        |
| Monitor the canvass in real time                             | 20        |
| <b>Optimized Routing</b>                                     | <b>23</b> |
| <b>Street Team Canvassing</b>                                | <b>24</b> |
| Creating Street Team efforts                                 | 24        |
| How to use Street Team in MiniVAN                            | 26        |
| Adding new contacts to My Campaign or EveryAction            | 27        |
| Adding canvass results                                       | 28        |
| Collecting form responses                                    | 29        |
| Collecting contributions when canvassing                     | 30        |
| Syncing your data  | 31        |
| <b>MiniVAN Contributions</b>                                 | <b>32</b> |
| Setting up MiniVAN contributions in VAN                      | 32        |
| Reviewing MiniVAN contributions in VAN                       | 32        |
| Collecting contributions in MiniVAN                          | 32        |
| <b>Refresher on creating a canvass</b>                       | <b>33</b> |
| Creating a list  | 33        |
| Survey Questions + Activist Codes                            | 38        |
| Building Scripts   | 40        |
| Cutting Turf   | 41        |
| <b>FAQ</b>   | <b>44</b> |

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Carl Henderson

4:23 PM



Jennifer Willis

4:20 PM



# MiniVAN Manager

**Smarter canvassing in real time.**

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

[Learn More](#)

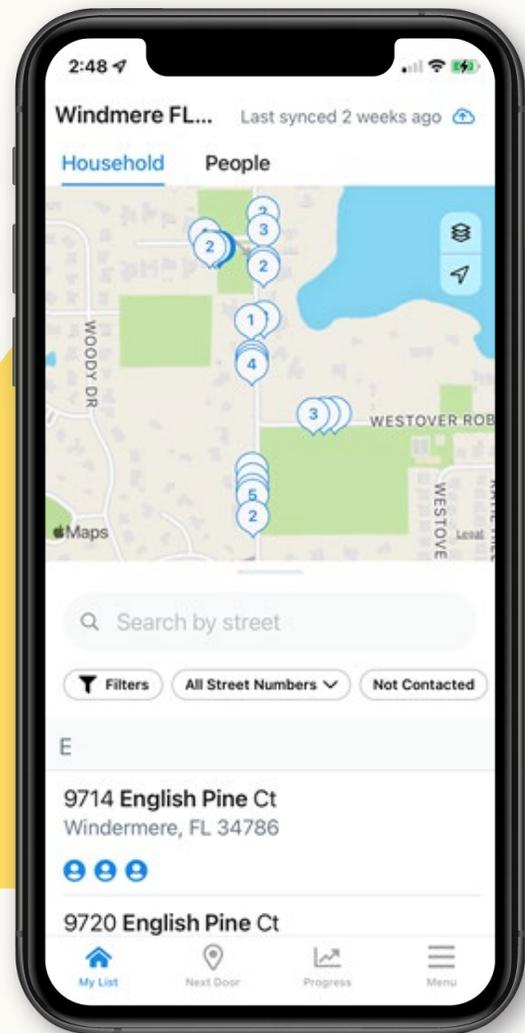
# Why MiniVAN?

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

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

If you don't want to cut turf anymore, you don't have to. Distributed Contacts automates turf cutting for you. (New to cutting turf? Check out our [Turf-Cutting Guide](#) and [Distributed Contacts Guide](#).) Instead of entering data at the end of the day, household-by-household, you will be able to simply commit the data to the system. It's that easy.

MiniVAN also creates a better experience for canvassers. MiniVAN's map view helps canvassers confidently navigate unfamiliar turf. The Find My Next Door feature shows all houses, ordered by distance. With the closest houses at the top of the list, canvassers can quickly orient



themselves. In addition, the Optimized Routing add-on provides canvassers with the most efficient route, including turn-by-turn directions.

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

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

# Running a **MiniVAN-** first canvass

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

## Quick start

The transition to MiniVAN canvassing can be as simple or as sophisticated as you want. You do not have to create user accounts because canvassers can create their own ActionID right from the app. Canvassers can reuse their ActionID for every canvass (and can use it for other tools like OpenVPB!)

If you want to get a quick start, make sure that you have a script associated with your turf and ask your canvassers to download the MiniVAN Touch app in the iOS App Store or Google Play Store. After they create an ActionID for themselves, have them enter the list number from a turf packet.

This will send all the script, list, and other details of that walk packet directly to their mobile device and they can start knocking doors right away.

### **Turf Packet Summary – Lafayette! Turf 01**

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

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

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

# Tips on running a mobile-first canvass

## 1 **Make a decision and commit to it.**

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

## 2 **Partner new canvassers with experienced canvassers.**

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

## 3 **Invest in a few tablets.**

This transition will greatly reduce the amount of paper and ink your campaign goes through, saving you money on printers, toner, and paper. We recommend re-investing some of those savings in your canvass operation by purchasing a couple of tablets. This will ensure that all volunteers are able to participate in your canvass, even if they don't own a smartphone or feel comfortable using their own device.

Please note that phone data is not required to use MiniVAN. Canvassers can download the list and sync the results back using WiFi. If your canvassers lose their signal, MiniVAN will queue up data when they're off the grid and syncs the data when they get back in range.

## 4 **Create a phone charging station.**

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

## 5 **Update your reminder email.**

Refresh your pre-canvass reminder email to make sure volunteers know ahead of time that you're running a MiniVAN canvass—check out our tips below!

# Preparing your canvassers to use MiniVAN

## Training materials

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

Your guide should walk volunteers through the basics of using the MiniVAN app. [Here's a basic guide to get you started.](#)

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

Can't make your own video?

Here's Ours



## Set up a training area in your staging location

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

Print out large, wall-sized screenshots of the app to help walk volunteers through each step of their canvass, from downloading the app to syncing their results. We encourage you to create these so that you can walk canvassers through your script(s).

We've made it easy for you—you can [download this packet of screenshots](#) for you to post in your training area.

## What to include in your reminder email

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

- 1 **Download** the **MiniVAN Touch** app *before* they arrive—include links to the Apple and Google Play Store.

According to our research, the #1 blocker to folks using MiniVAN is users not knowing their App Store password. **Make sure volunteers download the app before they show up** at your canvass location.

- 2 **Create** an ActionID to log in.
- 3 **Bring** a well-charged smartphone or tablet. Also, encourage them to bring a charger or an extra battery for their device to use in the field office or in their car.
- 4 **Update** their app if they've used MiniVAN before. The app is being improved every cycle.
- 5 **View** training materials and videos—[use our MiniVAN training video](#), or make your own!

## Sending your canvassers out on the doors

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

Canvassers will be able to view a combined map and list view of the households on their turf—this will make it easier for canvassers to orient themselves on turf and find the houses they are looking for.

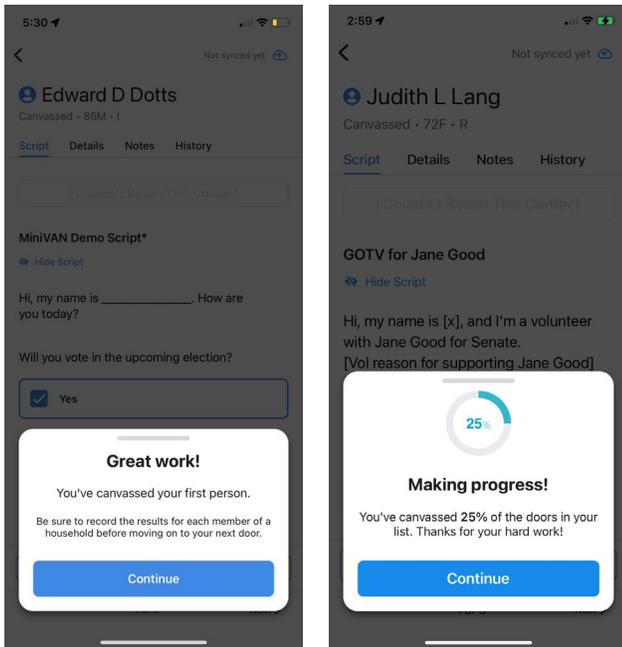
Selecting *Next Door* will show canvassers all houses, ordered by distance. With the closest houses at the top of the list, canvassers can quickly get started on the most efficient route through their turf. If available, canvassers can use the Optimized Route option to get a smart walking or driving route through their turf.

### *Pro-Tip* | Team canvassing

If your canvasser prefers to canvass with a partner, have the two canvassers enter the same list number. When a canvasser syncs their data, their partner will be able to see which doors have already been knocked. This feature is especially helpful during GOTV, or if you have canvassers working the same lists for multiple days. The most recent knock attempt will appear for that list number for 7 days, or until the turf is refreshed.

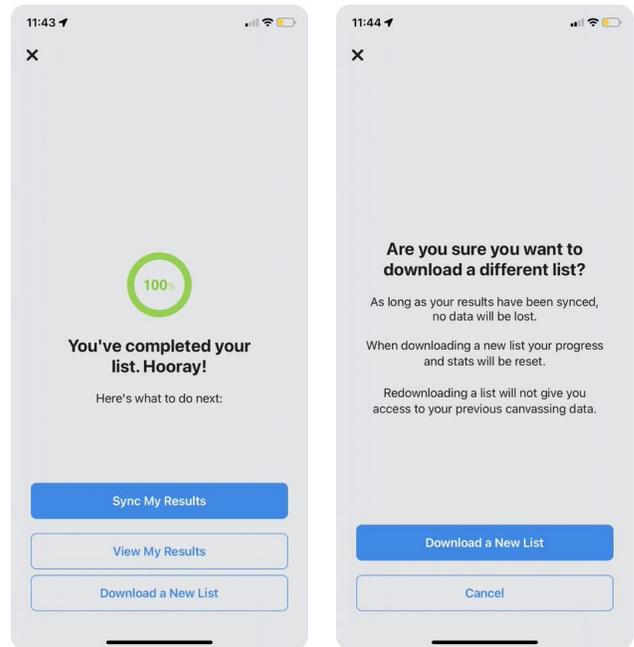


# Notifications



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

Notifications will appear after canvassers successfully canvass their first home and at the 25%, 50%, and 75% progress marks.



When canvassers complete their list, they'll be encouraged to sync their results and download a new list.

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

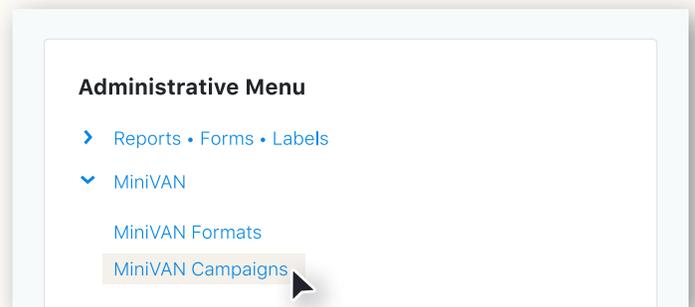
Canvassers will also receive a notification if there aren't doors available for distributed contacts.

# Create your MiniVAN campaign

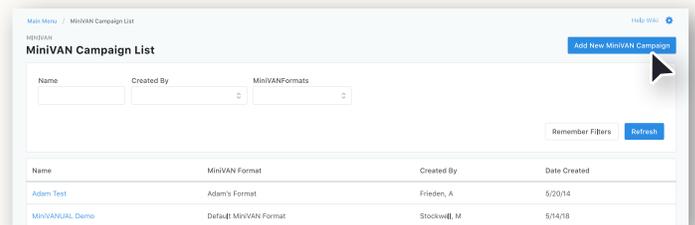
## What is a MiniVAN campaign?

A roll-up of settings for your canvassers, including script, contact method, and display fields that are available on the app.

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

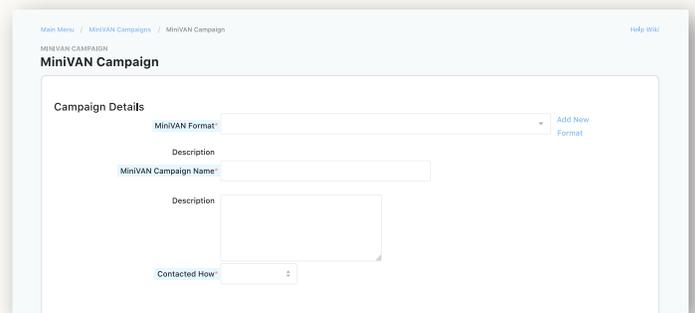


- 2 From the *MiniVAN Campaign List*, select **Add New MiniVAN Campaign** on the upper right-hand side.



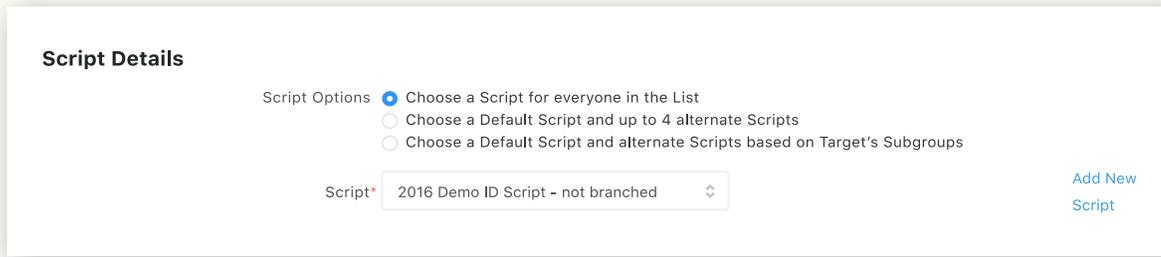
- 3 Under *Campaign Details* on the MiniVAN Campaign page, select your **MiniVAN Format**. The Default MiniVAN Format will work well for most canvasses.

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



# Link Scripts to your MiniVAN campaign

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



**Script Details**

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

Script\* 2016 Demo ID Script - not branched ⌵

[Add New Script](#)

## Choose a Script for everyone in the List

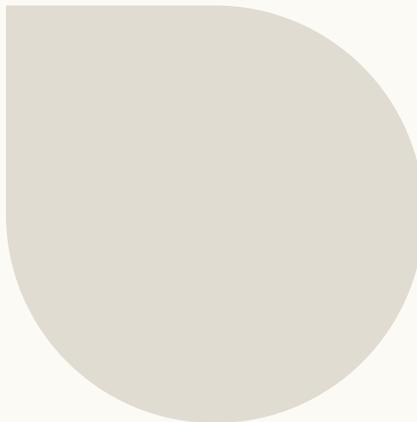
Select **Choose a Script for everyone in the List** to address each voter with the same script and use the **Script** dropdown menu to select which script to send out.

## Choose a Default Script and up to 4 alternative Scripts

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

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

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



# Creating Branched Scripts

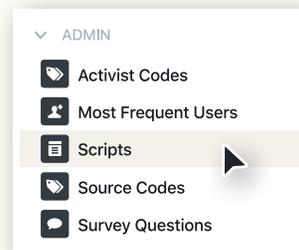
**Branched Scripts** are responsive to the results that your canvassers receive on the doors. The voter's responses will inform the next question.

## Branched Scripts

Branched scripts help guide canvassers on the doors by programmatically showing the next question on the script based on the answer to the first. If you want to use branched scripts with printed list numbers, you'll need to select the MiniVAN campaign associated with your branched script. You'll also need to select a linear script in the required "Script" field, but don't worry—your branched script in the MiniVAN campaign will override it.

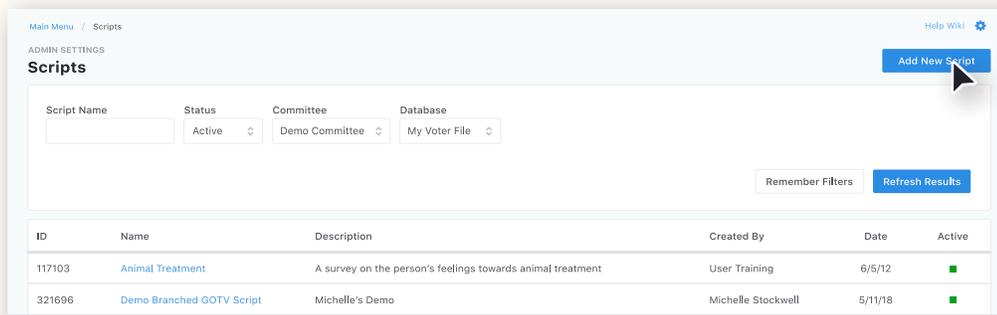
For example, when voters indicate strong support for your candidate, the script could prompt the canvasser to ask if the voter would consider volunteering for the campaign. If a voter indicates that they strongly support the opponent, the script could then prompt the canvasser to politely leave. This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

- 1 To get started, select **Scripts** from the ADMIN section of the Main Menu.



- 2 On the upper right-hand side of the Scripts page, select **Add New Script**.

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



**3** Under Script Type select **Branched**.

**Script Type**

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

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

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

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

**Branched Script Preview**

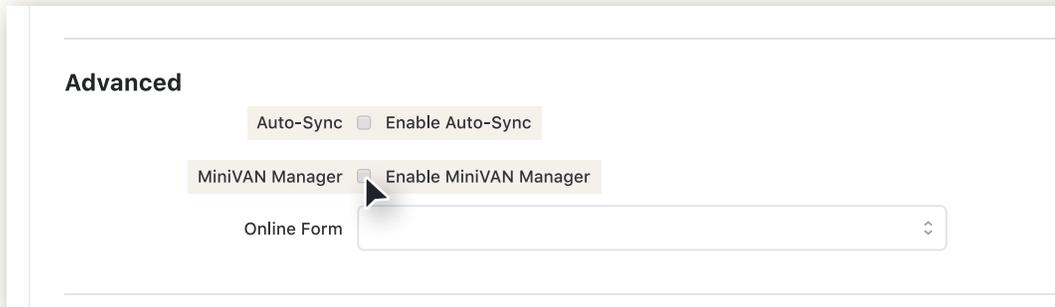
|   |          |                                      |  |   |             |
|---|----------|--------------------------------------|--|---|-------------|
|    | <b>1</b> | Text                                 | Hi, my name is _____ and I am a volunteer with the local Democratic Party.   |  2     | Delete Edit |
|  | <b>2</b> | Survey Question:<br>Still supporting | A few weeks ago, you promised to support our candidate on election day, Tuesday, November 6. Do you still intend to vote for our candidate on Tuesday? |   | Delete      |
|   |          | Yes                                  |  |  3   |             |
|   |          | Unsure                               |  |  6   |             |
|   |          | No                                   |  |  End |             |
|   |          | No Response                          |  |  End |             |

## Pro-Tip | Light mode and dark mode

MiniVAN is supported in both light and dark modes, so your volunteers can use their preferred app view.



# Advanced settings



**Auto-Sync is automatically enabled**, which means the MiniVAN app will automatically sync back to your CRM every 5 minutes.

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



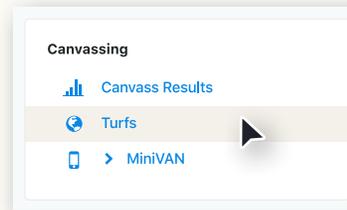
## *Pro-Tip* | Collecting sign ups and donations

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

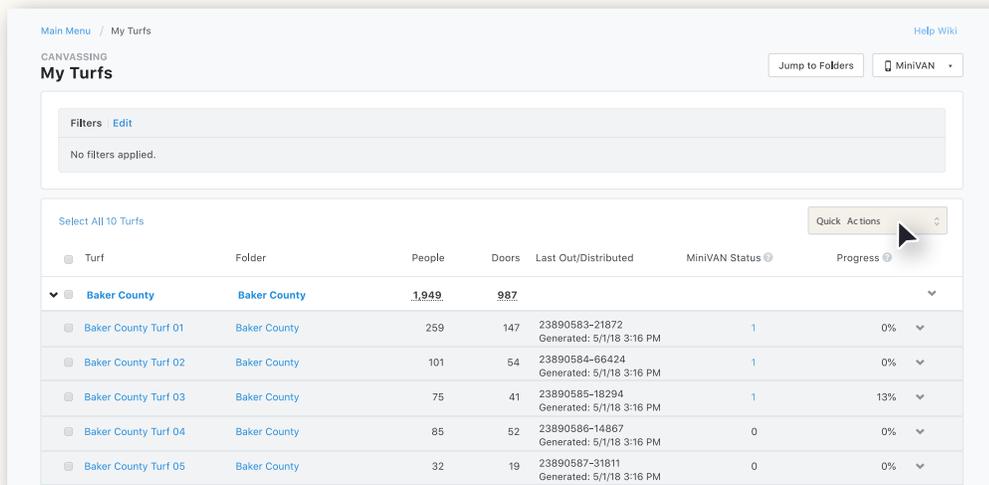
Once you've selected the details of your MiniVAN Campaign on the MiniVAN Campaign page, you can set-it-and-forget-it by clicking Save on the bottom of the page.

# Turf Manager

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



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



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

## Printing your turf

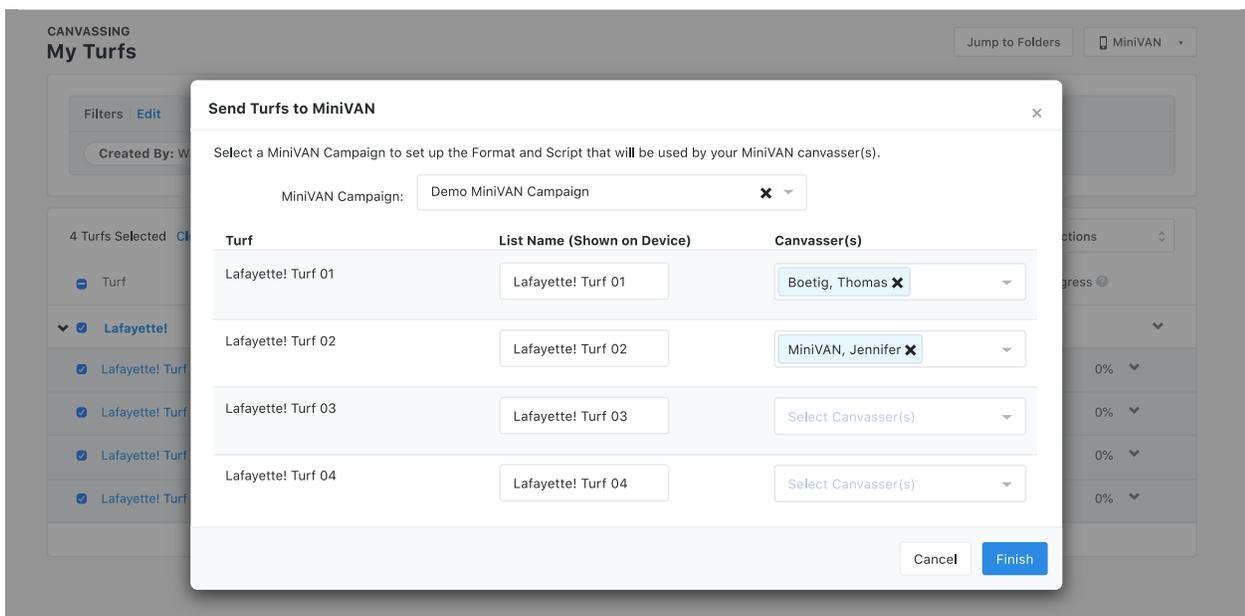
If you'd like to print the entire turf packet, select **Print**. We recommend selecting **Print for MiniVAN** to print the list sign-out sheet as well as a map and cover sheet for each turf.

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

## Push out lists in bulk

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

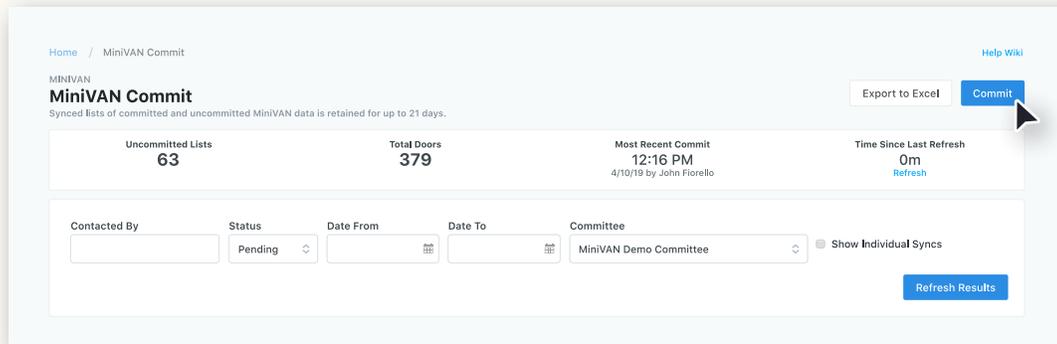
The **Send Turfs to MiniVAN** window will pop up, allowing you to assign canvasser(s) to each block of turf.



# Commit and review results

## Commit your MiniVAN data

After people are done canvassing, select **Go to Commit Page** on the upper right-hand side of the screen.



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

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

# Review your results

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

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

### Contact History Report

View contact history from the last 14 days

Report Actions

Applied Filters | [Edit Filters](#)

Contact Records: All Contacts

#### Report Summary

|                            |                  |           |              |         |                |
|----------------------------|------------------|-----------|--------------|---------|----------------|
| First Canvass Attempt Date | Canvass Attempts | Canvassed | Left Message | Refused | Other Language |
| 3/15/19                    | 109              | 58        | 1            | 4       | 1              |
| Last Canvass Attempt Date  | Individuals      | Not Home  | Disconnected | Moved   | Other Result   |
| 3/31/19                    | 86               | 27        | 1            | 3       | 14             |

Input Type Name | Edit Columns

|   | Input Type Name | First Canvass Attempt Date | Canvass Attempts | Canvassed | Left Message | Refused | Other Language | Last Canvass Attempt Date | Individuals | Not Home | Disconnected | Moved | Other Result |
|---|-----------------|----------------------------|------------------|-----------|--------------|---------|----------------|---------------------------|-------------|----------|--------------|-------|--------------|
| ▶ | Bulk            | 3/30/19                    | 20               | 20        | 0            | 0       | 0              | 3/31/19                   | 20          | 0        | 0            | 0     | 0            |
| ▶ | Mobile          | 3/15/19                    | 84               | 37        | 1            | 4       | 1              | 3/29/19                   | 61          | 25       | 0            | 3     | 13           |
| ▶ | VPB             | 3/27/19                    | 5                | 1         | 0            | 0       | 0              | 3/28/19                   | 5           | 2        | 1            | 0     | 1            |

3 Records - 1 Page 1

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

# Distributed Contacts

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

## Best practices: creating your Distributed Contacts campaign

### Think about scale

When you pull a list for distributed contacts, be mindful of your turf and volunteers. A volunteer in a suburban or rural setting may be comfortable driving thirty minutes to reach their turf, but a volunteer in an urban setting may expect turf that is closer to their staging location. Collaborate with your field team to identify which lists are appropriate for which volunteers. To control this, you can customize the ruleset for how many miles away the contacts can be from a canvasser.

### When to use Distributed Contacts vs Cut Turf

We've seen folks use Distributed Contacts 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 can be used when you don't have the time or the staff power to hand-cut turfs.

### Include enough doors

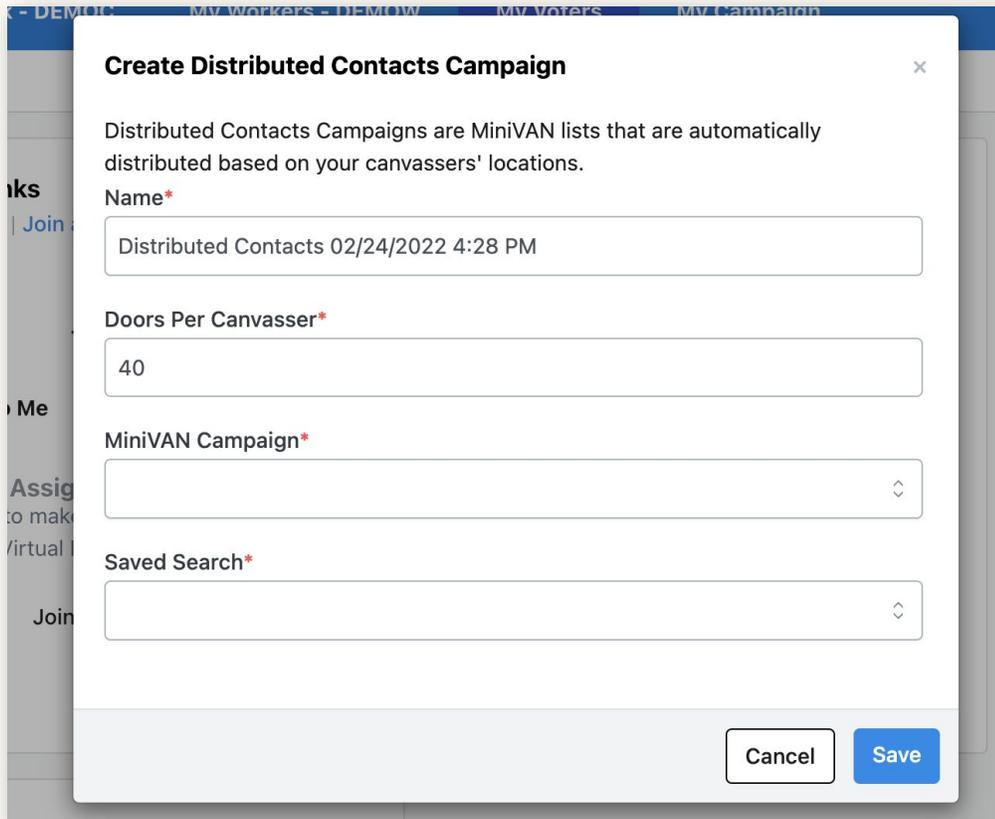
Make sure the number of doors in your distributed contacts universe matches your level of volunteer availability and engagement. It's important to have enough doors for everyone participating.

### Include a remove step in your saved search

Distributed Contacts campaigns are driven by saved search. Be sure to include a step in your saved search that removes folks who have already been canvassed to make sure folks are contacted more than once.

# Setting Up Distributed Contacts

- 1 From the Organizer Dashboard or the Distributed Contacts List Page, select **Create New**.
- 2 In the *Create Distributed Contacts* pop-up window, name your canvass and indicate how many doors you want to be assigned to each canvasser. Then select your MiniVAN Campaign and your Saved Search or universe.



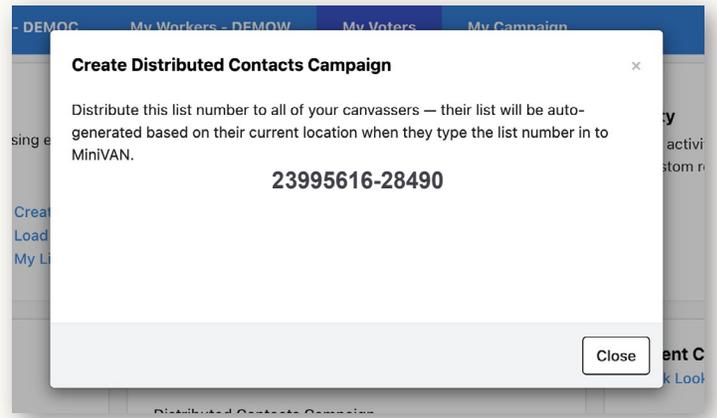
The screenshot shows a pop-up window titled "Create Distributed Contacts Campaign" with a close button (X) in the top right corner. Below the title is a descriptive sentence: "Distributed Contacts Campaigns are MiniVAN lists that are automatically distributed based on your canvassers' locations." The form contains four fields, each with a red asterisk indicating it is required:

- Name\***: A text input field containing "Distributed Contacts 02/24/2022 4:28 PM".
- Doors Per Canvasser\***: A text input field containing "40".
- MiniVAN Campaign\***: A dropdown menu that is currently empty.
- Saved Search\***: A dropdown menu that is currently empty.

At the bottom right of the pop-up, there are two buttons: "Cancel" and "Save".

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

**3** Next, you'll see a list number that you can distribute to all of your canvassers. (Each canvasser will use the same list number.) Their turf will be auto-generated based on where they are located when they type the list number into the MiniVAN app.



Each canvasser will get a unique list of doors. Once a door has been assigned, it can't be checked out by another canvasser for a set period of time. That list is checked out to them until the voters are checked back into the Distributed Contacts universe or the days checked out has passed. You can customize the rule set for the number of days that a list can stay checked out on a device. The saved search powering the Distributed Contacts campaign refreshes overnight, which is when voters are added to or removed from the universe based on the search criteria.

After the canvass, you will be able to see a full Distributed Contacts report.

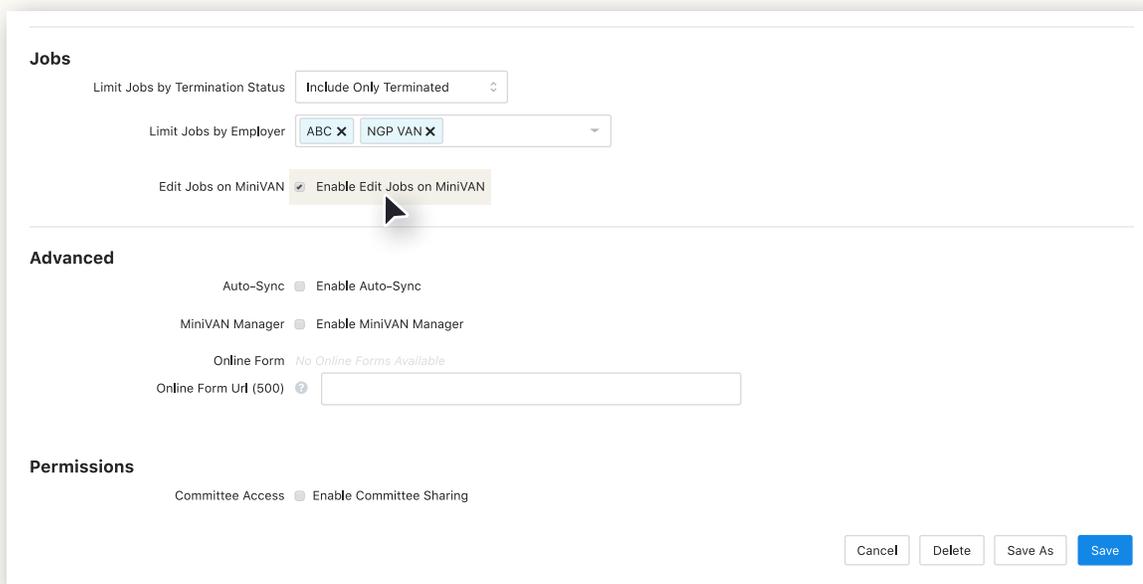
# Editable Jobs

## (Advanced feature for labor organizing)

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

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

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



The screenshot displays the configuration interface for a MiniVAN Campaign, divided into three main sections: Jobs, Advanced, and Permissions.

- Jobs Section:**
  - Limit Jobs by Termination Status:** A dropdown menu set to "Include Only Terminated".
  - Limit Jobs by Employer:** A dropdown menu with two selected items: "ABC X" and "NGP VAN X".
  - Edit Jobs on MiniVAN:** A checkbox labeled "Enable Edit Jobs on MiniVAN" which is checked. A mouse cursor is pointing at this checkbox.
- Advanced Section:**
  - Auto-Sync:** A checkbox labeled "Enable Auto-Sync" which is unchecked.
  - MiniVAN Manager:** A checkbox labeled "Enable MiniVAN Manager" which is unchecked.
  - Online Form:** A section with the text "No Online Forms Available" and an "Online Form Url (500)" input field.
- Permissions Section:**
  - Committee Access:** A checkbox labeled "Enable Committee Sharing" which is unchecked.

At the bottom right of the interface, there are four buttons: "Cancel", "Delete", "Save As", and "Save".

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

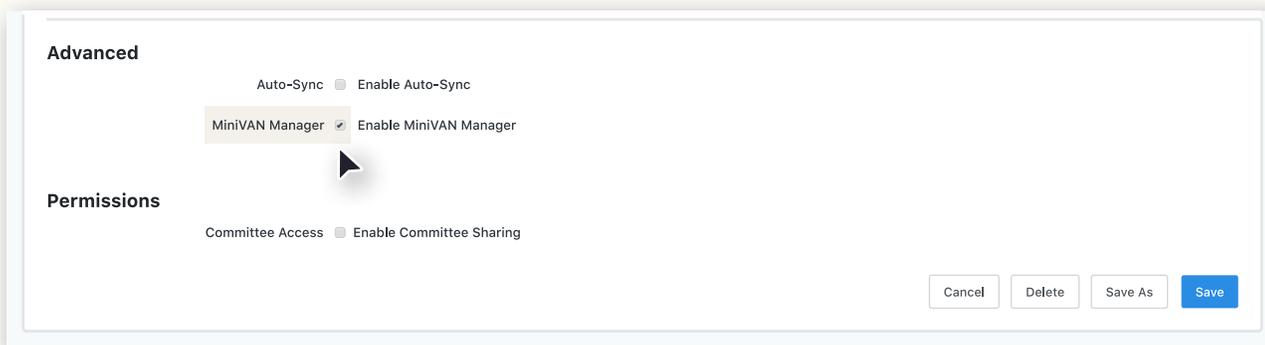
# MiniVAN Manager

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

## Set up MiniVAN Manager

On the lower left-hand side of the dashboard, select **MiniVAN Campaigns** from the MiniVAN dropdown menu.

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



The screenshot shows a settings form with two sections: "Advanced" and "Permissions".

- Advanced:**
  - Auto-Sync  Enable Auto-Sync
  - MiniVAN Manager  Enable MiniVAN Manager
- Permissions:**
  - Committee Access  Enable Committee Sharing

At the bottom right, there are four buttons: "Cancel", "Delete", "Save As", and "Save".

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

## Monitor the canvass in real time

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

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

The screenshot displays a canvassing dashboard. At the top, it shows summary statistics: 'All Canvassers (Today)' with a count of 3, 'Attempts' of 26 (with a sub-count of 13 Doors), and a 'Contact Rate' of 30% (with a sub-count of 8 People Contacted). Below this, there are filter buttons for 'CONTACTED 8', 'NOT HOME 18', and 'OTHER 0'. The main area is split into a map on the left and a 'Canvassers' list on the right. The map shows a street grid with colored dots representing canvassers. The list on the right has columns for 'Canvasser', 'Attempts', 'Contact Rate', and 'Last Sync'. The data in the list is as follows:

| Canvasser       | Attempts | Contact Rate | Last Sync |
|-----------------|----------|--------------|-----------|
| Sarah Baughman  | 5        | 40%          | 12:23PM   |
| Rebecca Straley | 9        | 22%          | 12:34PM   |
| Jennifer Willis | 12       | 33%          | 12:13PM   |

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

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

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

- **All Canvassers** will display the whole team assigned to the canvass.
- **Active Canvassers** will display canvassers who have synced back information in the last 90 minutes.
- **Downloaded List** will display canvassers that have not synced back any data since downloading the list.
- **Inactive** will display canvassers that have not synced back any data in the last 90 minutes.

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

**Filters**

MiniVAN Campaign  Team  Division

Canvasser Status

- Active
- Downloaded List
- Inactive

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

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

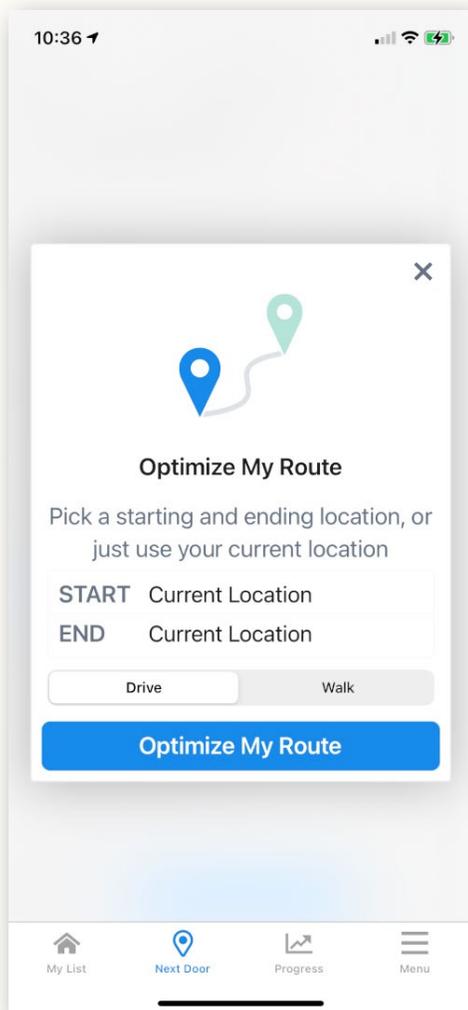


## *Pro-Tip* | Using MiniVAN in Spanish and French

Spanish and French language translations are now available for all app elements! If you have a Spanish or French language script, the entire app will be translated into Spanish or French. Be sure your canvassers set their device language to Spanish or French to set the appropriate translations.

# Optimized Routing

Optimized Routing is an add-on tool that creates an optimized walk route for the canvasser. Once the canvasser enters their start and end point and chooses walking or driving directions, their canvass list will be reordered based on the most efficient route between their start and end point. Canvassers are also provided with turn-by-turn walking or driving directions, making it easier to complete the entire packet efficiently.



Optimized Routing can be enabled for lists with up to 148 doors or locations, although that number could vary based on the number of apartments on the list.

# Street Team Canvassing

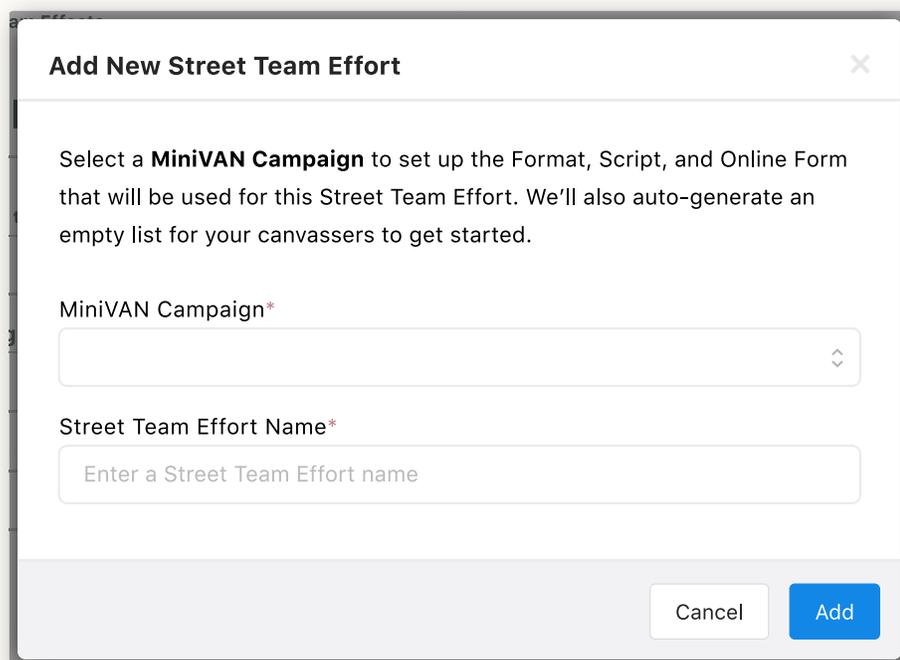
The Street Teams feature allows you to survey anyone you might encounter, which means you don't need create a list or cut turf ahead of time. It allows you to enter a brand new contact or lookup an existing voting record. Canvassers will also be able to collect contributions.

## Creating Street Team efforts

On the lower left-hand side of the dashboard, select **MiniVAN Campaigns** from the MiniVAN dropdown menu.

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

- 1 From the Canvassing section on the Main Menu, select **Street Team Efforts**.
- 2 Select **Add New Street Team Effort** on the upper right-hand side of the page.
- 3 From the pop-up window, select your MiniVAN Campaign from the dropdown menu. This MiniVAN Campaign will include the Format, Script(s), and Online Form that will be used for this Street Team Effort. Then add a Street Team Effort Name.



The screenshot shows a modal window titled "Add New Street Team Effort" with a close button (X) in the top right corner. The window contains the following text and form elements:

Select a **MiniVAN Campaign** to set up the Format, Script, and Online Form that will be used for this Street Team Effort. We'll also auto-generate an empty list for your canvassers to get started.

MiniVAN Campaign\*

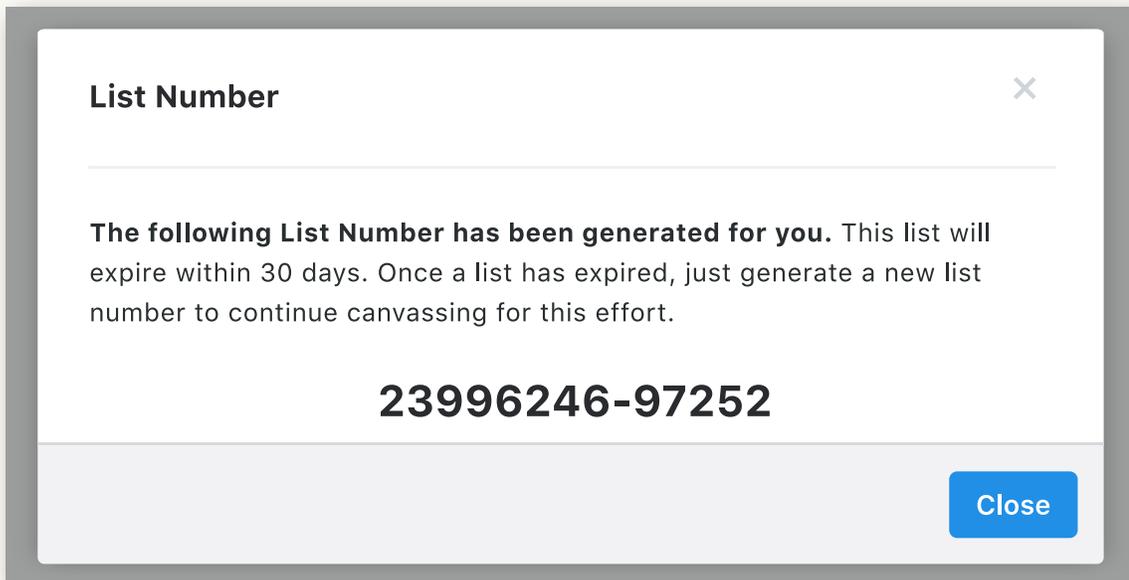
Street Team Effort Name\*

Enter a Street Team Effort name

At the bottom right of the modal, there are two buttons: "Cancel" and "Add".

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

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

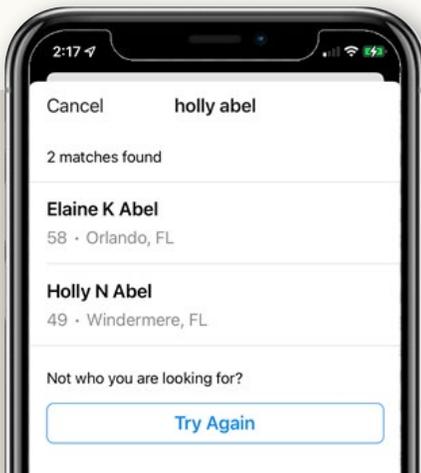
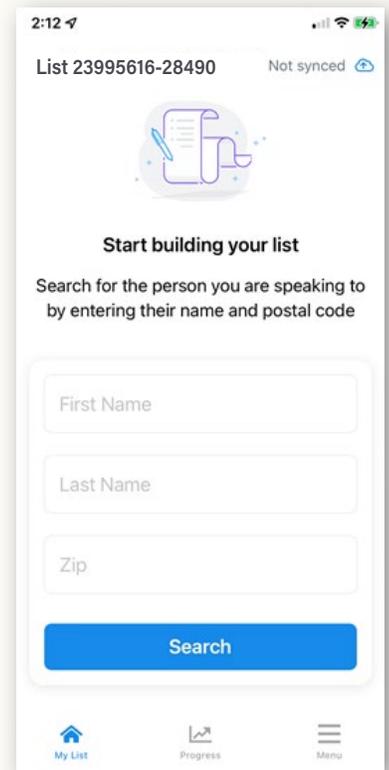


A new landing page will appear in the MiniVAN app that will count the Number of Contacts and the Amount Raised.

## How to use Street Team in MiniVAN

When you use the add-on **MiniVAN Street Team package for your canvassing efforts**, you'll have an easy way to capture the contact details of the people you speak to in the community and then record the results of your conversations. You won't need a pre-defined list of voters or contacts. After entering a supporter's name or identifying their voter record, you can jump right into your script, gather their answers to questions, encourage them to sign electronic petitions, and even donate on the spot. All your results automatically sync back to your CRM.

If you are canvassing registered voters for your Street Team effort in My Voters, your first step will be to search the voter file for the person you are speaking with. If you're not using the voter file but instead are using your EveryAction or My Campaign database, you'll be able to directly add a new person to your list as you go.

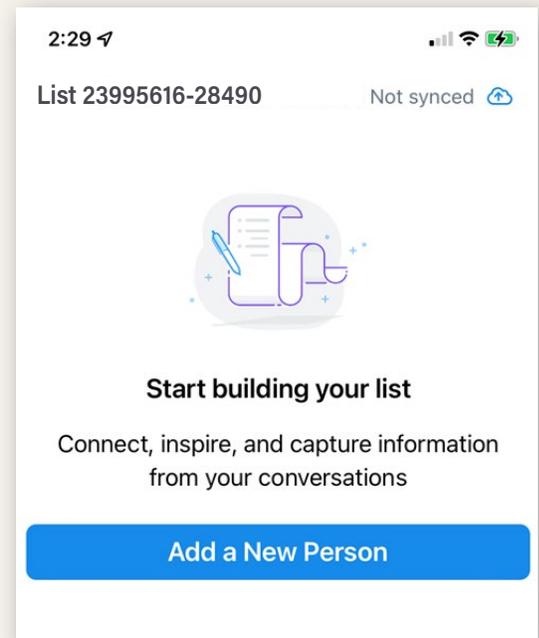


Talk to someone not on your list? From any list you can now search the voter file for that person and record your conversation if there is a match.

**Select one of the names from the results** or try searching again with different criteria. If there is no record for the person in the voter file, you will not be able to add the contact.

## Adding new contacts to My Campaign or EveryAction

If you're not using the voter file but instead are using your EveryAction or My Campaign database, you'll be able to **directly add a new person to your list** as you go.

A screenshot of the 'Add a New Person' form in a mobile application. The form has a title bar with 'Close' and 'Add a New Person'. Below the title bar, there is a section titled 'Contact Information' with a chevron icon. The form contains three input fields: the first contains 'Paulina', the second is labeled 'Middle Name', and the third contains 'Cuadrado'. Below these fields is a section titled 'Enter Address' with a blue 'Search' button and a link 'Manually Add Address >'.

The **only required fields to add a new contact are first and last name**, but you'll have the option to add other information about the person you are canvassing.

A screenshot of the 'Enter Address' section of the mobile application. It features a blue 'Search' button with a magnifying glass icon and a link 'Manually Add Address >'.

When adding an address, you can **search for it on Google Maps and auto-fill the results** or manually add an address.

You'll also be able to enter other information like phone number and email address.

# Adding canvass results

2:30

Close Add a New Person

Script

Membership Script

[Hide Script](#) | [Change Script](#)

Hi, my name is \_\_\_\_\_ and I'm a volunteer for this great organization. How are you today?

Would you be interested in becoming a member of our amazing organization?

Yes

Maybe Later

Not Today

Once you're added the contact or found the voter, the app will open on **the script page that will walk you through the survey questions, event sign-ups, or other information you need to gather.**

2:51

List 23995616-28490 Not synced

1 Contacts

[Hide Summary](#) | [View All List Details](#)

Search for a Person

Search by name

A

Curt A Anderson  
Canvassed

Once you are done canvassing that person, you can then add another person to your list or search the voter files again for the next person.

# Collecting form responses

Close Add a New Person

Script

Clean Energy Petition Script

Hide Script

Hi, do you have a moment to help the environment today?

Do you support clean energy policy?

Yes

Undecided

No

No Response

Contact Information

If you're collecting form responses or signups, you will **see a green pen icon in the lower right**. If you do not see this button, contact your organizer for more help.

AA secure.everyaction.com

Back to MiniVAN

Support Clean Energy in our state by signing our petition!

Goal 5000 Supporters 0

Hi Pauline, fill out our petition!

Contact Information

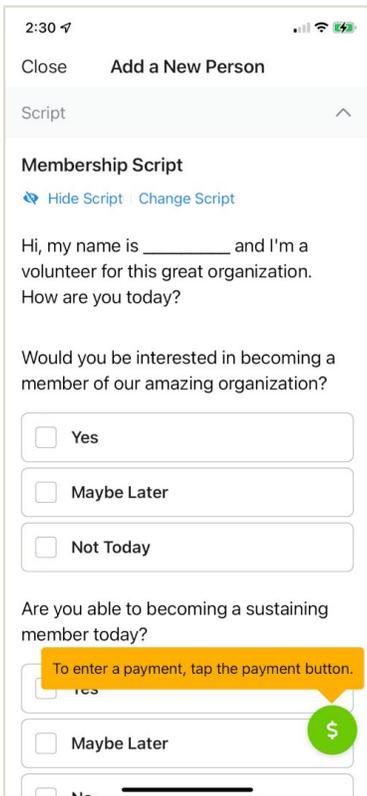
First Name Pauline

Last Name Cuadrado

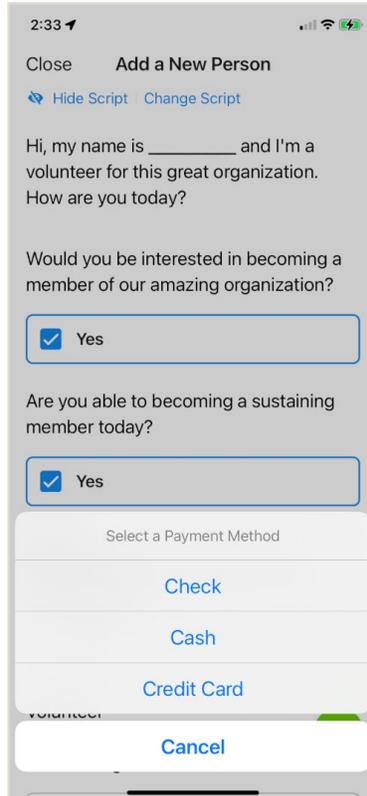
Clicking on the button will take you out of the app and **into the signup or questionnaire form on your device's default browser**. The person's information will be auto-filled based on what you entered when you added the contact, and you or the supporter can finish filling out anything else and submitting the form.

After the supporter has submitted the form, use the button at the top to navigate back to MiniVAN.

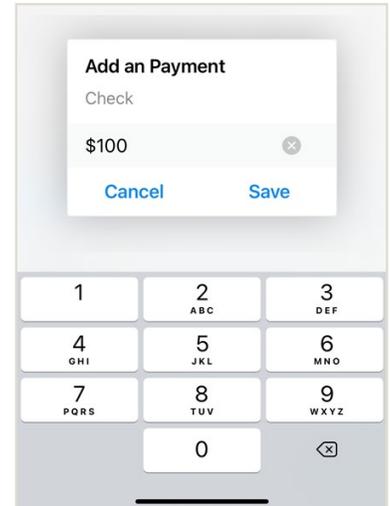
# Collecting contributions when canvassing



If you're collecting contributions, you can **enter a donation from the supporter by tapping the green payments button**. If you do not see this button, contact your organizer for more help.



Select one of the available payment methods. If you do not see the payment options you need, contact your organizer for instructions.



If the donation is cash or check, you will only need to enter the amount you were given.

If the person is **paying with a credit card, the online contribution form that is assigned to your effort will open** so you can process their payment immediately. The **donor's contact information will be pre-filled** with the information you entered when you added the contact. You can then collect their card number and any other details and submit the form. You can also use the camera on your device to add their credit card information using the Scan Card link available by default on most mobile devices.

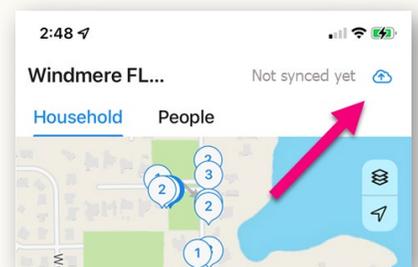
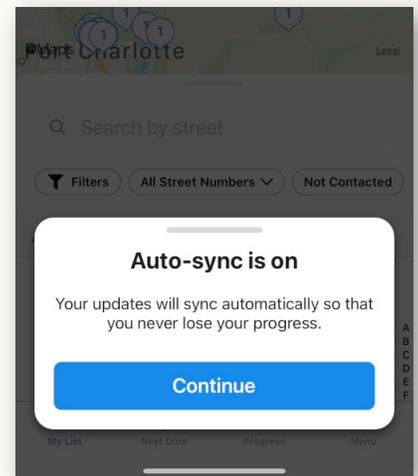
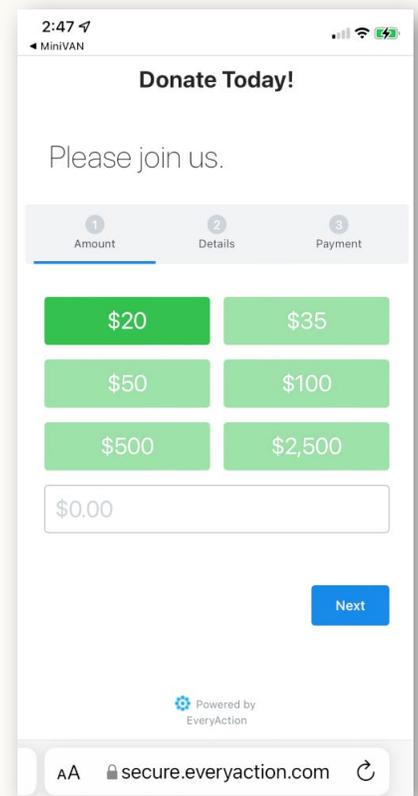
Once you sync your MiniVAN data back to the CRM, credit card contributions donated through the form will **process right away and a contact record will be created**. You should always manually sync your MiniVAN data right away if you are processing credit card transactions.

## Syncing your data

When you first open your list, **you should see a message that Auto-sync is on**. (Only Administrators can disable the auto-sync option.) This will allow canvass results to be added automatically to your database as long as you have an active data connection.

You will need to be connected to WiFi or a data connection in order to download your list at the beginning of your canvass. But even if you lose your connection while you canvass (or if you only have WiFi-enabled devices), **the app will still save your results and automatically send them back to your database as soon as your connection is restored**.

You can always **manually sync your data by using the sync icon** in the right-hand corner or from the Menu at the bottom. It's a good practice to make sure you have synced your data before you leave for the day.



# MiniVAN Contributions

## Setting up MiniVAN contributions in VAN

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

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

## Reviewing up MiniVAN contributions in VAN

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

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

## Collecting contributions in MiniVAN

If MiniVAN Contributions have been enabled, canvassers will be able to collect contributions. A green payments button will appear on the bottom navigation bar.

Clicking on the **green payments button** will allow the canvasser to select a payment method (Cash/Check/Credit Card). The associated Online Actions Form/Donation Page will open in Chrome or Safari.

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

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

Close    Add a New Person

Script

**Membership Script**

[Hide Script](#)   [Change Script](#)

Hi, my name is \_\_\_\_\_ and I'm a volunteer for this great organization. How are you today?

Would you be interested in becoming a member of our amazing organization?

Yes

Maybe Later

Not Today

Are you able to becoming a sustaining member today?

To enter a payment, tap the payment button.

Yes

Maybe Later

# Refresher on creating a canvass

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

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

- 1 Creating a list (choosing the voters you'll contact)
- 2 Creating survey questions (creating questions for your script)
- 3 Build a script
- 4 Cutting turf

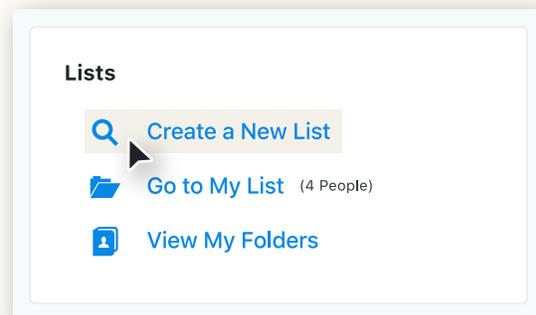
After you've created your list and built your script, you can go back to the start of this guide to create your MiniVAN campaign.

## Creating a list

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

### Select Create a New List

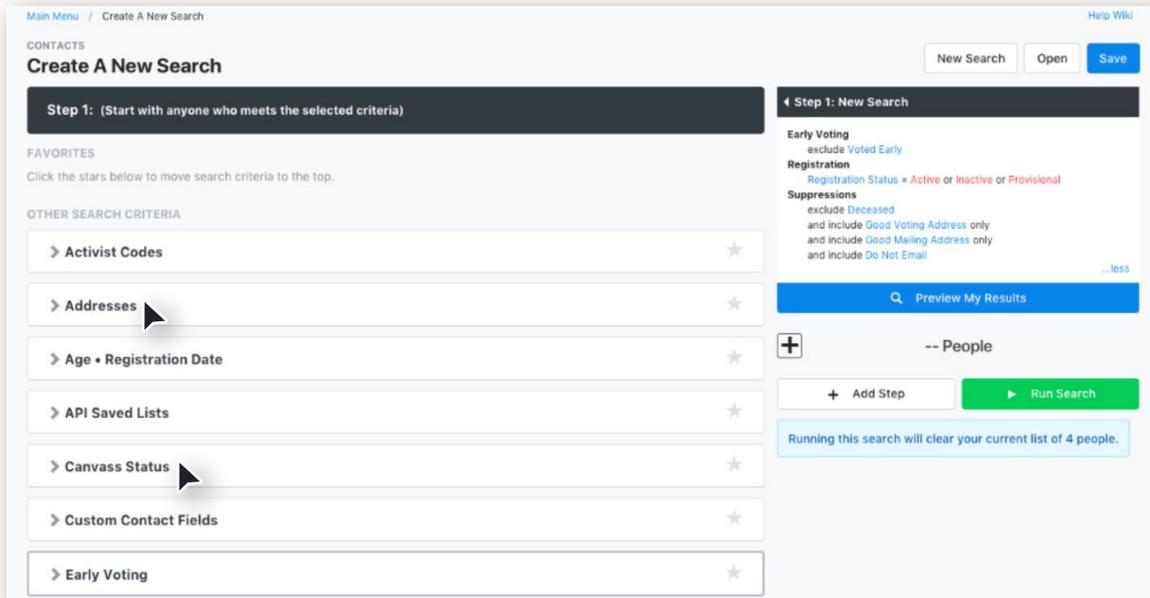
**Create a New List** is found on the menu of both *My Voters* and *My Campaigns*.



### 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** (County, State, or Congressional,) demographic information, and profile characteristics such as having a listed phone number or email address.

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



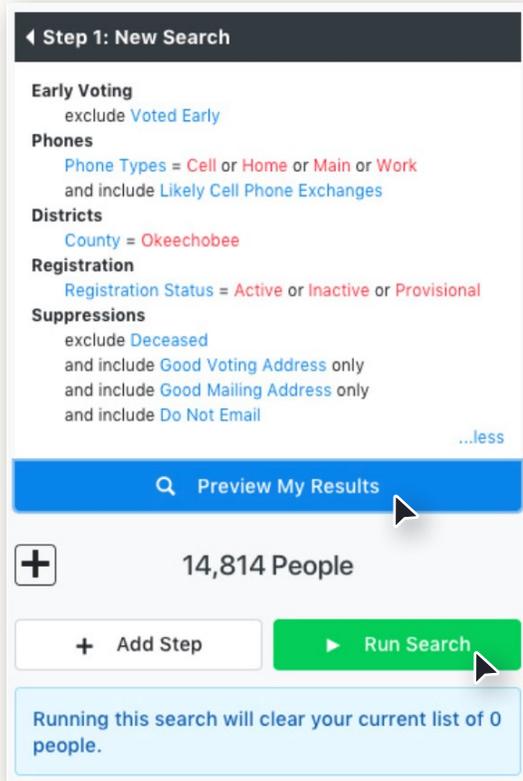
## Selecting multiple search terms

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



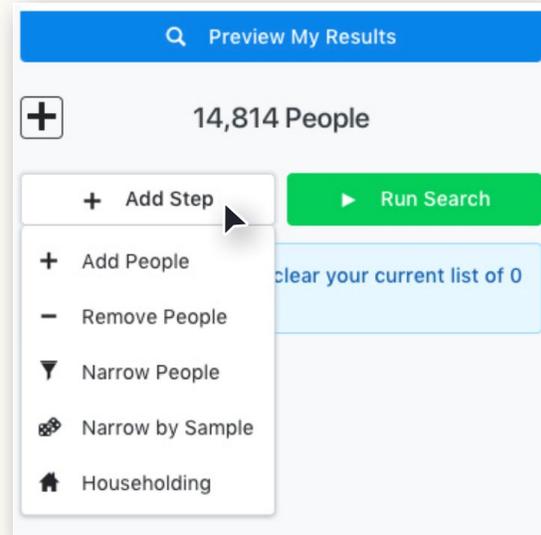
## Track your list

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



## Run the search

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



## Edit the search, if necessary

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

## View the list

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

The screenshot shows the 'My List' interface. At the top, there are navigation links for 'Main Menu' and 'My List', and a 'Help Wiki' link. Below this, the 'CONTACTS' section is titled 'My List'. There are four summary statistics: 14,814 People, 14,538 Home Phones, 9,089 Doors, and 9,413 Mailboxes. A row of 16 icons represents various actions: Print, Letters, Labels, Calls, Export, MiniVAN, Counts, Reports, Cut Turf, Split, Grid, Script, Form, Bulk Apply, Copy, and SMS. Below the icons is a 'Description' section with input fields for 'Last Name' and 'First Name'. A red message box states: 'Below is a sample because your list is too large to display.' To the right of this message are 'Remember Filters' and 'Refresh Results' buttons. Below the message is a table with the following data:

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

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

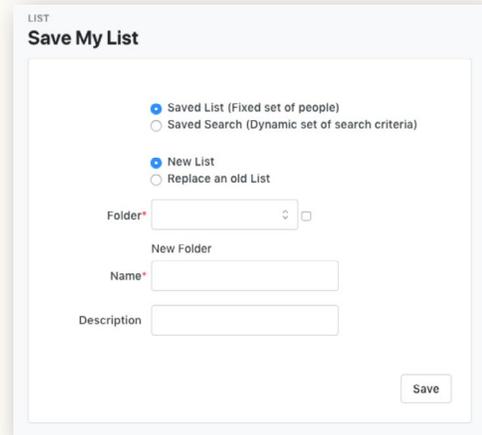
## Saving + sharing lists

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

### Saving lists

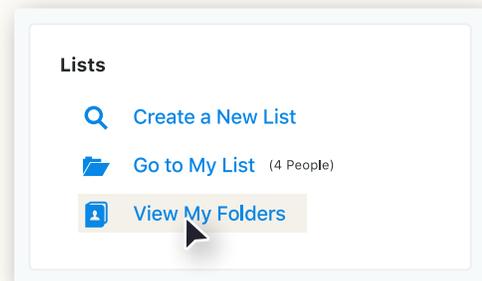
Select **Save List As** from the top-right corner of the *My List* page.

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



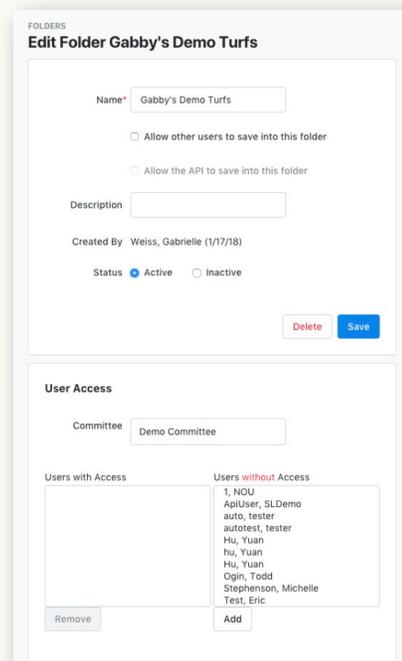
### Create a folder to house the list

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



### Sharing lists

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



## View the folder

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

## Add user access

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

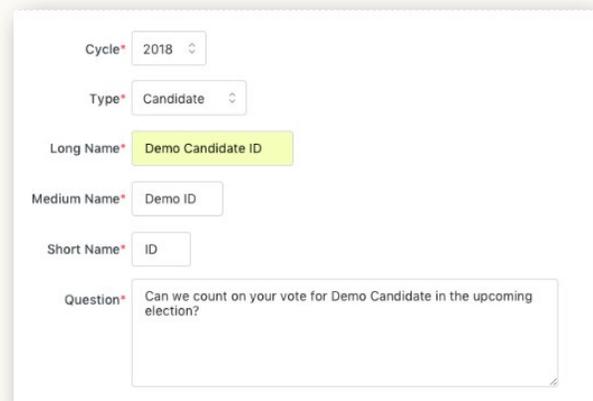
## Survey Questions + Activist Codes

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

Select **Survey Questions** or **Activist Codes** from the **Codes-Questions-Scripts** dropdown.

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

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



The screenshot shows a form for creating a Survey Question. The fields are as follows:

- Cycle\***: 2018 (dropdown)
- Type\***: Candidate (dropdown)
- Long Name\***: Demo Candidate ID (text input, highlighted in yellow)
- Medium Name\***: Demo ID (text input)
- Short Name\***: ID (text input)
- Question\***: Can we count on your vote for Demo Candidate in the upcoming election? (text area)

## Enter question/code text and name details

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

## For Survey Questions: enter responses

You can enter as many responses to a Survey Question as you need—from a simple yes or no, to a 1–5 Candidate ID scale.

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

# Building Scripts

Once you have created Survey Questions and Activist Codes, put them into a Script and you'll be ready to start contacting voters for your campaign. Building a script is an easy process of assembling various elements.

## Type text elements

On the **Add Script Element** panel, type your desired script introduction into the **Text** field. When satisfied, click Add, and a preview of that text will populate in the **Linear Script Preview Panel**.

## Insert dynamic script elements

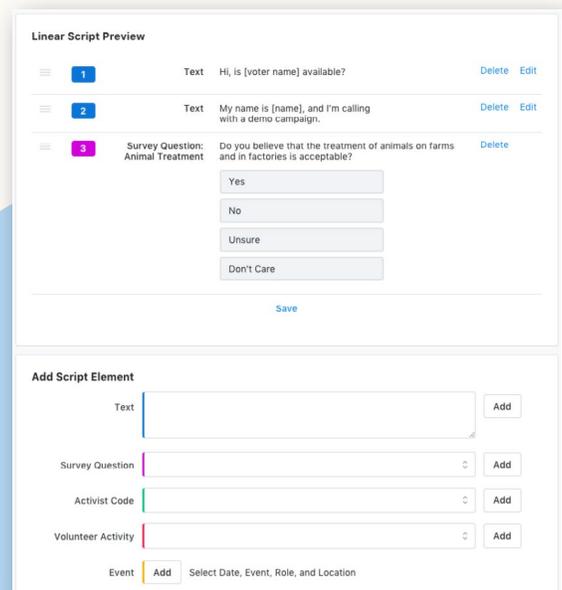
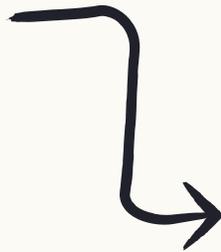
To insert a Survey Question, Activist Code, or Event invitation into a script, select them from the dropdown menus and click **Add**. The element will populate in the script preview.

## Edit or adjust as necessary

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

## Choose canvass results options

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



# Cutting Turf

From the **My List** page, select **Cut Turf**.

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

## Click the screen to drop pins

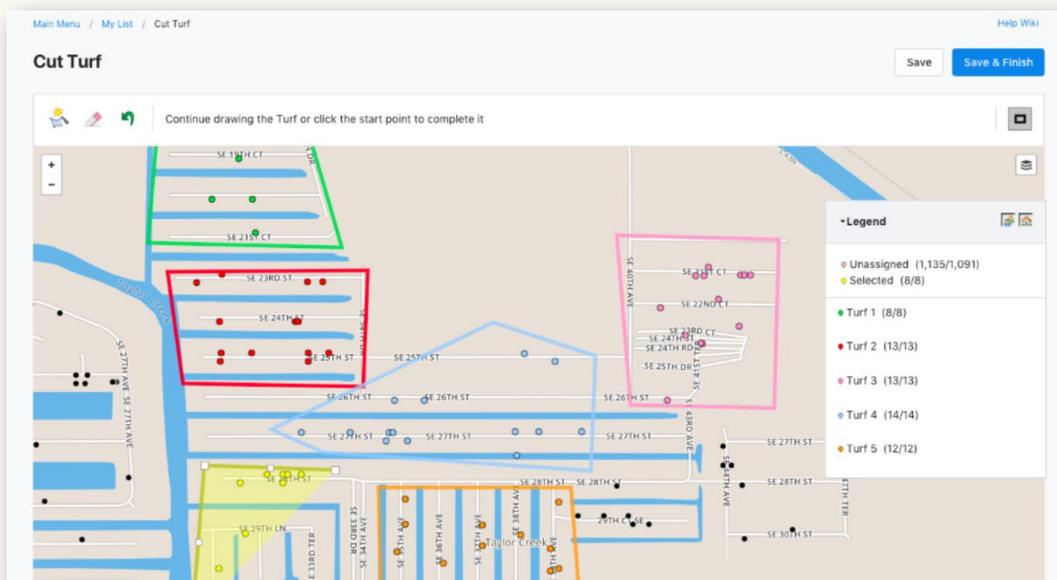
To begin cutting the turf, click on the screen to drop a pin where you want to begin a turf. Click on the screen again to drop the second pin, creating a turf boundary between the two points, and continue dropping pins until you are happy with the turf size. As shown on the yellow turf below, doors that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

## Cut additional turfs

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

## Erase or undo as necessary

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



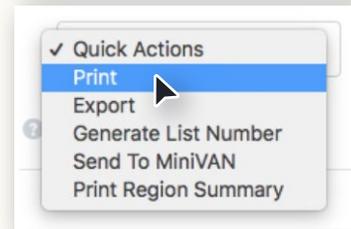
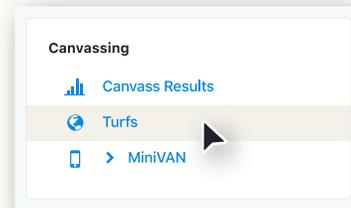
## Save the turf

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

## Print the turf

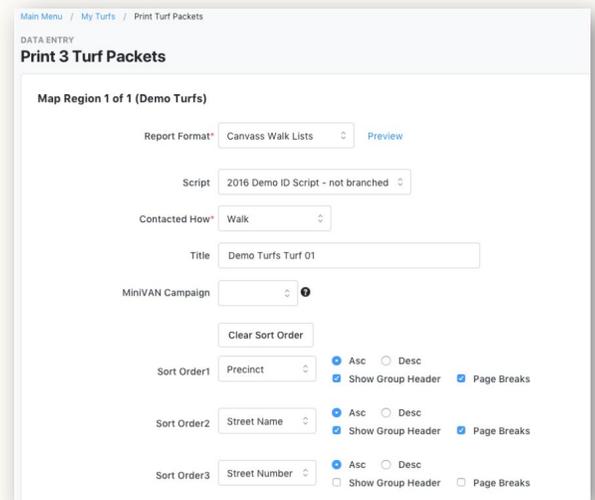
Saved turf can be accessed by selecting the **Turfs** option the Canvassing section of the Main Menu.

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



## Choose print settings

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



## Download and print PDF

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



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

1 PDF Print Job · 1 Page

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



# Frequently asked questions

## ○ **How does the MiniVAN app affect battery life?**

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

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

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

## ○ **Who should I contact for support?**

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

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

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

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

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

## ○ **My synced data is taking a while to show up.**

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

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

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

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

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

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

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

## *Additional Notes*

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

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