



Getting Started Guide

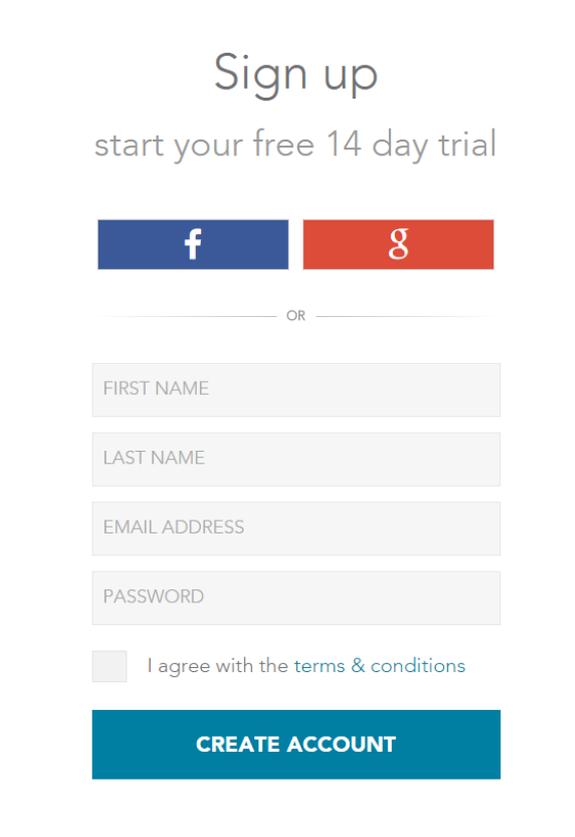
Campaign Managers

Signing Up for the first time

Registering on the website

Register on www.ecanvasser.com by clicking on 14 Day Free Trial or Register in the top right hand corner. Fill out the form provided by entering the following:

1. First Name
2. Last Name
3. Valid email address
4. Secure password (for security purposes all passwords must be at least 8 characters long)
5. Check the terms & conditions box
6. Click Create Account



The screenshot shows a sign-up form with the following elements:

- Header: "Sign up" in a large font, followed by "start your free 14 day trial" in a smaller font.
- Social login options: Two buttons for Facebook (blue with 'f') and Google (red with 'g').
- Separator: A horizontal line with "OR" in the center.
- Input fields: Four stacked text boxes labeled "FIRST NAME", "LAST NAME", "EMAIL ADDRESS", and "PASSWORD".
- Terms and conditions: A checkbox followed by the text "I agree with the terms & conditions".
- Submit button: A large blue button labeled "CREATE ACCOUNT".

You will then receive an email from Ecanvasser to confirm that the address you signed up with is valid. Simply click on the confirm button in the email and it will take you directly to the sign in page where you can input your email and password to gain access.

Downloading the App

Mobile Ecanvasser is available to download from both the Apple App Store and Google Playstore.

The app is a free to download.



Creating a new campaign

To create a new campaign, go to the "Campaign" tab on the toolbar at the top right hand side of the screen. When you click this a drop down menu will appear. Click the "Create Campaign" option.

1. Name you campaign.
2. Set the plan option to the voter file size required.
3. Set payment method.

Click "Create" to confirm your campaign. Now you can upload your voter file.

CAMPAIGN

Name

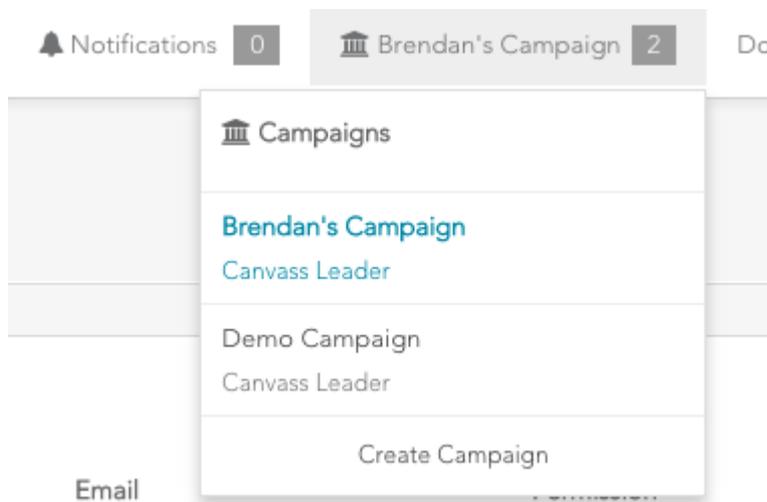
Plan

Payment

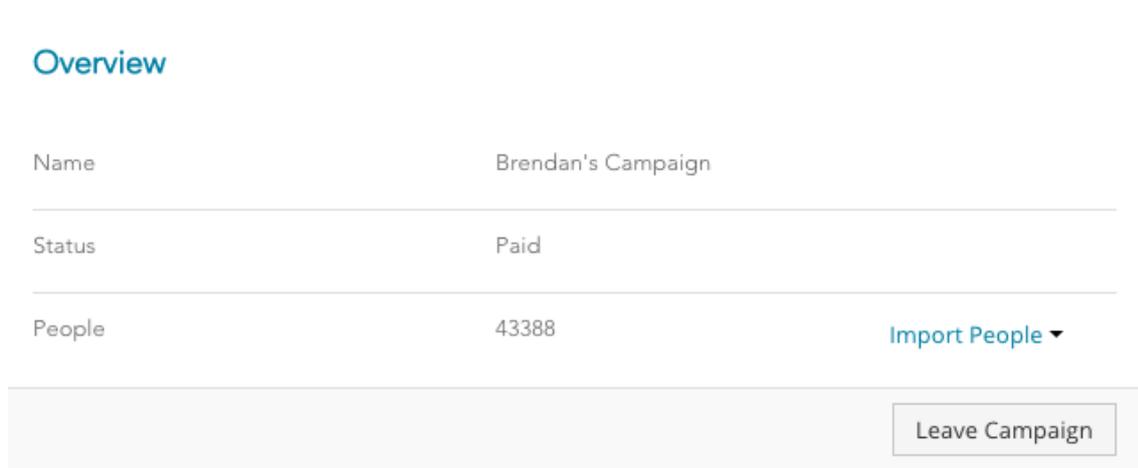
Create

Switching between Campaigns and leaving a Campaign

1. To switch between campaigns, click on the "Campaigns" tab on the toolbar at the top right hand corner of your screen.
2. This will show you a drop down menu of all the campaigns on your account.
3. The campaign that you are currently viewing will be highlighted in blue.
4. Simply click on the campaign you wish to view and Ecanvasser will switch to that campaign.

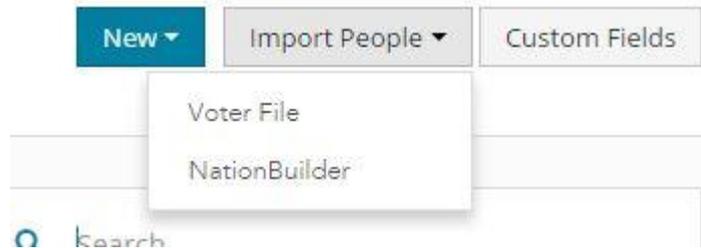


To remove yourself from a campaign, click "Leave Campaign" in the Overview section of the Campaign page.



Importing People via Voter File

Go to either the Campaign tab or the People tab on the dashboard and you will see the button "Import People" on the top right hand side of the tab. Use this dropdown to import your voter file



In the "Upload Voter File" box click "Choose File"
****Please Note**** Ecanvasser will only import documents in the accepted file types listed below.

Upload Voter File

Choose Files

Accepted File Types: .xlsx, .xls, .ods, .csv

Max File Size 40MB

Selected Files

Upload

Reset

Pick the file you wish to upload and click "Open", now click "Upload"
The voter file you have chosen will now show. Click "Start Import"

Upload Voter File

Choose Files

Accepted File Types: .xlsx, .xls, .ods, .csv

Max File Size 40MB

Selected Files

test Donna.xlsx

Upload

Reset

Set the fields for each column and click "Import"

****PLEASE NOTE**** There are a number of columns that are required by Ecanvasser. These are "Street address" "City" and "State". This is because Ecanvasser is based on houses rather than people. So if the addresses in your imported list are not filled out correctly they will not import.

VOTER FILE							
	Select Field	Select Field	Select Field	Select Field	Select Field	Select Field	Select Field
Row 1	don't import	First name	Last name	Street Address	City	ZIP	State
Row 2		Fred	Flintstone	185 1 AVENUE	Manhattan	NY 10003	New York
Row 3		Betty	Rubble	166 ESSEX STREET	Manhattan	NY 10002	New York
Row 4		Barney	Rubble	121 EAST 3 STREET	Manhattan	NY 10009	New York
Row 5		Wilma	Flintstone	600 EAST 6 STREET	Manhattan	NY 10009	New York
Row 6		Bart	Simpson	285 DELANCY STREET	Manhattan	NY 10002	New York
Row 7		Homar	Simpson	293 EAST BROADWAY	Manhattan	NY 10002	New York

Once the loading bar shows 100% the details will be included in your list of people.

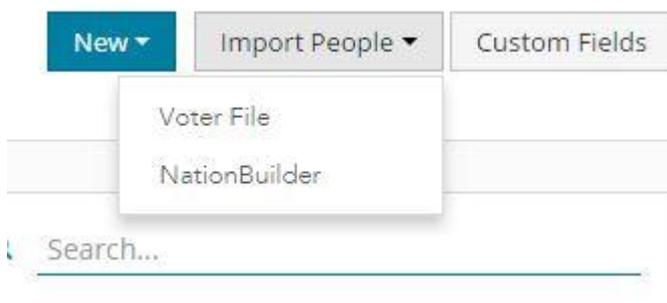
Voter Files					
#	File Name	Status	Progress	Date Uploaded	
1	Untitled spreadsheet.xlsx	Geocoding	100%	2015-07-30 11:16:12	 

At this point your files will be "geocoding" meaning that your voters addresses will be translated into latitude and longitude points on the map so they can best be plotted. This is controlled by our IT team and can take some hours to complete. It depends on your voter file size. You will be able to see the progress of your geocoding and if you wish to contact our support section in the meantime please feel free.

Importing People via NationBuilder

If you have a [NationBuilder](#) nation then getting started with Ecanvasser couldn't be easier.

1. Go to the People tab on the left hand side of the screen.
2. Click on "Import People", this will bring up a drop down menu.
3. Choose "NationBuilder".

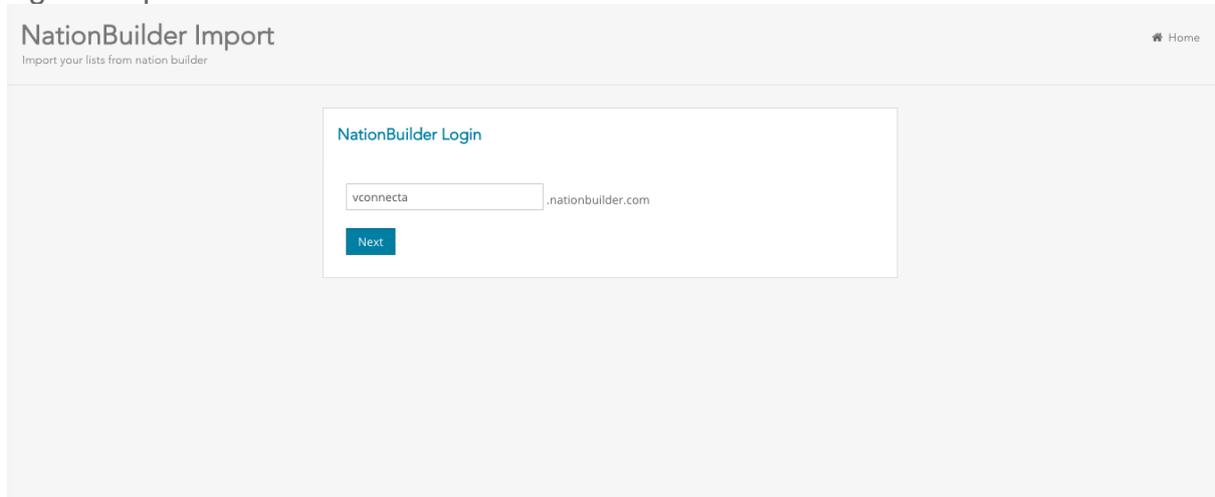


The "NationBuilder" option allows you to import data from the "NationBuilder" nation into Ecanvasser.

Type the "NationBuilder" slug into the text box

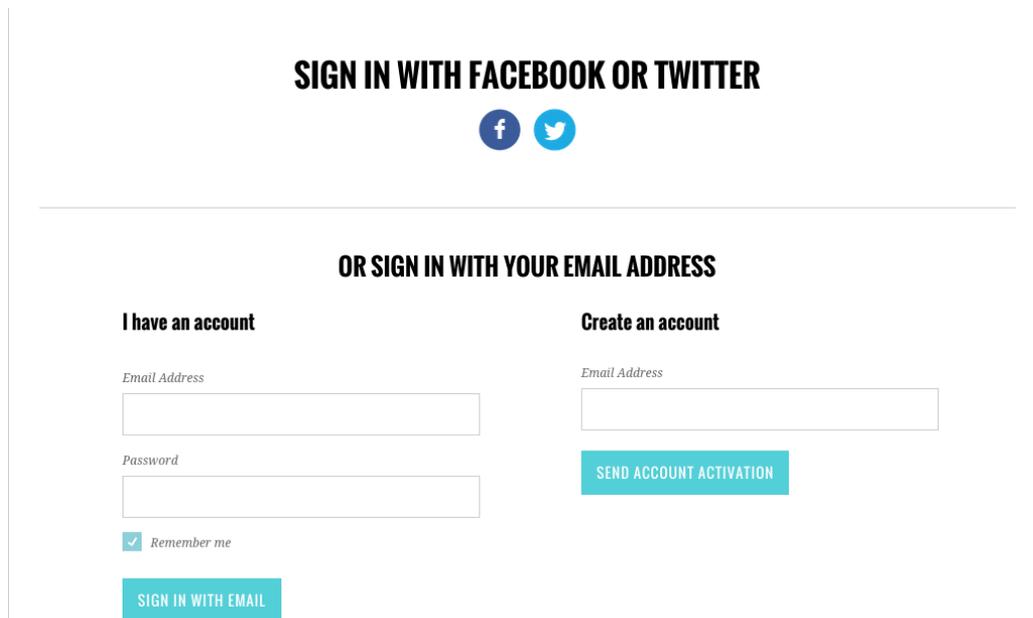
Your NationBuilder slug is the word before your own NationBuilder address.

Eg. example.nationbuilder.com



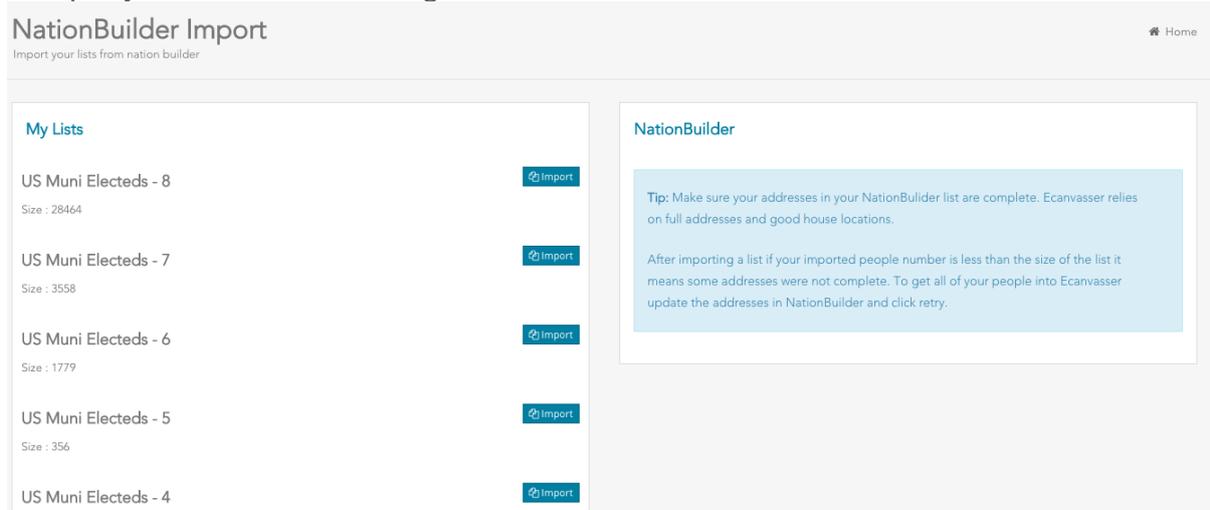
The screenshot shows a web page titled "NationBuilder Import" with the subtitle "Import your lists from nation builder". In the top right corner, there is a "Home" link with a house icon. The main content area features a "NationBuilder Login" form. The form has a text input field containing "vconnecta" followed by ".nationbuilder.com". Below the input field is a blue button labeled "Next".

4. Click "Next"



The screenshot shows a sign-in page with two main sections. The top section is titled "SIGN IN WITH FACEBOOK OR TWITTER" and features two circular icons for Facebook and Twitter. Below this is a horizontal line. The bottom section is titled "OR SIGN IN WITH YOUR EMAIL ADDRESS" and is divided into two columns. The left column is titled "I have an account" and contains an "Email Address" input field, a "Password" input field, a checked checkbox labeled "Remember me", and a blue button labeled "SIGN IN WITH EMAIL". The right column is titled "Create an account" and contains an "Email Address" input field, a blue button labeled "SEND ACCOUNT ACTIVATION", and no password field.

5. Input your NationBuilder login details.



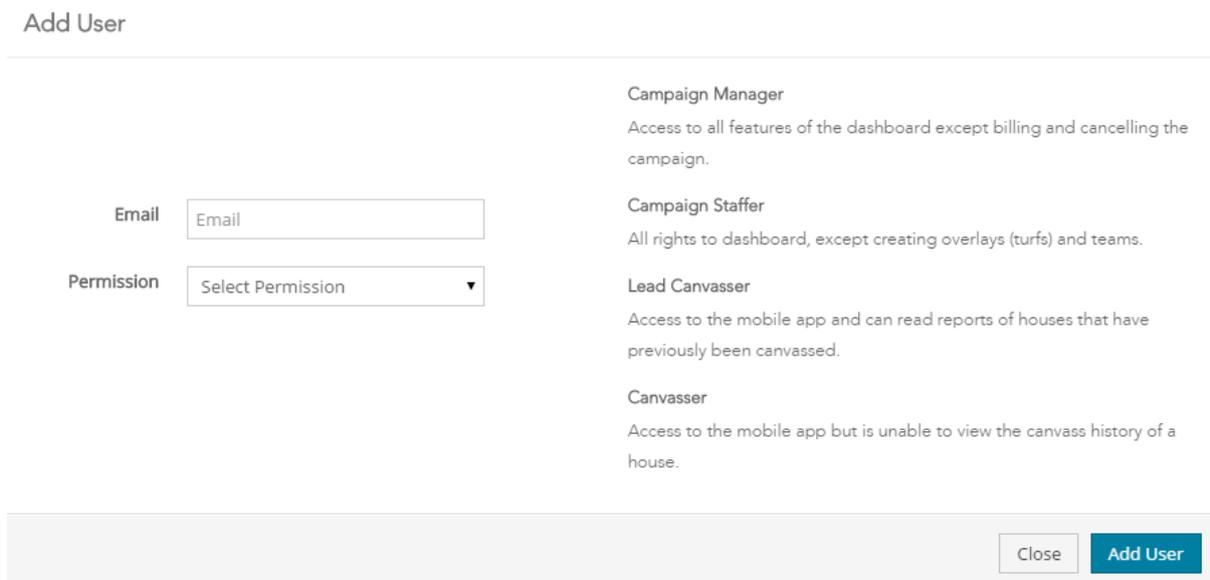
6. You will now see your NationBuilder lists. Click "Import" next to the list you wish to import and those people will be copied into Ecanvasser.

****Please Note**** Ecanvasser is based on houses rather than people. So if the addresses in your imported list are not full they will not import.

Adding Team Members

To create new campaign users, i.e., canvassers or staffers, go to the Campaign tab on the dashboard. In the Campaign Team box you will see a + icon in the top right of the box. Click this to add a new user.

Then enter your users' valid email to send an invitation and set a permission level.



There are five permission levels as described above from Campaign Manager all the way down to Canvasser.

At each access level you will also have access to all levels below you. So, for example, a Campaign Staffer will also have Canvasser Leader and Canvasser levels of access by default, but not Campaign Manager access.

Campaign users can also be easily edited and deleted by using the icons next to their names in the Campaign Team list on the Campaign tab.

Create and Sync a new Survey

Go to the Survey tab on the left hand side of the page. Click on New Survey.

Give your survey a Name and a Description (Top tip: type in the area for the survey and the date in the Description section along with the reasoning for the survey. This will help you to keep track and canvassers to know why they are asking it!).

The screenshot shows the 'Education' survey creation page. At the top left, there is a back arrow and the title 'Education' with the subtitle 'quick survey'. Below this is a navigation bar with tabs for 'QUESTIONS', 'RESULTS', 'EDIT', and '+ NEW QUESTION'. The main content area is divided into two columns. The left column has a 'Question Name' field with the placeholder 'Type your question here...' and an 'Add Response' section with a text area and a '+ Add' button. The right column is titled 'Question Format' and has four radio button options: 'Multiple choice' (selected), 'Yes/No', 'Text', and 'Strongly Agree - Strongly Disagree'. At the bottom left of the form is a 'Save' button.

To create custom answers, check the box and type in the answers. Otherwise Ecanvasser will create generic answers i.e. Strongly agree to Strongly Disagree.

To sync your survey to mobile devices simply click the tick icon in the control section of the survey list. A status should be set to live.

The screenshot shows the 'Survey' list interface. At the top left is the title 'Survey' and the subtitle 'Create and view your surveys.' At the top right is a 'New Survey' button. Below this is a table with the following columns: '#', 'Name', 'Description', 'Status', and a control section with a tick icon and a close icon. The table contains three rows of survey data.

#	Name	Description	Status	Control
1	City Election	Information Gathering	Not Live	✓ ✕
2	Education	quick survey	Not Live	✓ ✕
3	Immigration	Immigration is currently highly salient and in recent years has consistently ranked in the top five 'most important issues' as selected by the public.	Live	✓ ✕

Creating a new canvass team

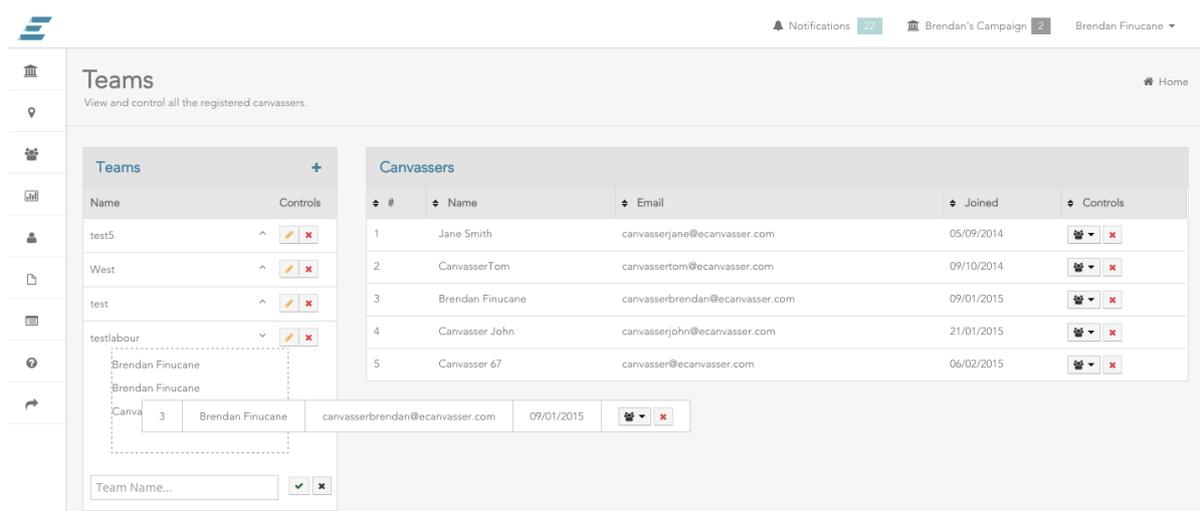
1. Go to the Teams tab along the left-hand side of the screen. This screen allows you to take control and manage all of your canvassers and assign them to teams.
2. To create a Team, click the icon circled below on the "New Teams" banner.
3. Type in a name for the Team.
4. Click the green tick to confirm.



You can edit/delete a team by clicking on the icons next to the team names.

Adding a canvasser to a Team

1. In the list of canvassers names hover your mouse over the name of the canvasser you wish to move into a team.
2. Click on this name.
3. Drag and drop the desired name into the grey dotted box of the name of the team.

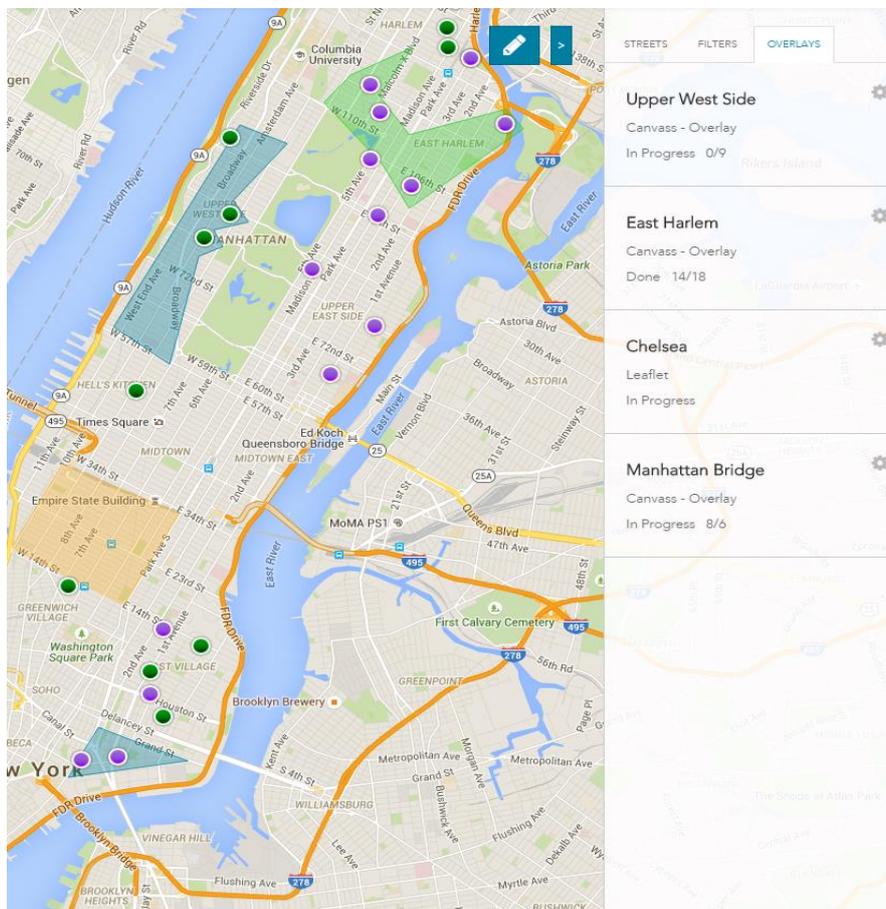
A screenshot of the 'Teams' interface. The top navigation bar shows 'Notifications 22', 'Brendan's Campaign 2', and 'Brendan Finucane'. The main content area is divided into two sections: 'Teams' and 'Canvassers'. The 'Teams' section has a table with columns 'Name' and 'Controls'. The 'Canvassers' section has a table with columns '#', 'Name', 'Email', 'Joined', and 'Controls'. A modal window is open, showing a team named 'testlabour' with a dotted box around it. A canvasser named 'Brendan Finucane' is being dragged from the 'Canvassers' table into this dotted box. Below the modal, there is a 'Team Name...' input field with a green checkmark and a red 'x' icon.

- Alternatively, you can click on the icon of people under the control tab next to the name of the desired canvasser.
- This will show you a drop down menu of the available groups.
- Click on the group you want and the name of the canvasser is inserted.

Creating areas to be canvassed

1. Go to the Map tab on the left-hand side of the screen.
2. To create an area to be leaflet dropped or canvassed, click on the pencil icon to the right of the screen.
3. Then click on the area you wish to be set and complete the shape.
4. Once completed the area will shade purple.
5. Simply fill out the details on the panel on the right hand side by giving the area a name (generally the name of the estate or road), set a status either done (if a leaflet drop) or active (if your team has yet to cover the area), set a type (leaflet or canvass).
6. Select a team or single team member to canvass and click save.

The area's shading will change to either Teal (if a canvass) or Orange (if a leaflet drop). Once the Canvas area has been marked as "Completed" it will show as green.



Message from the Ecanvasser team

We wish you the very best of luck with your campaign and would like you to know that we are here to support you at all stages in your work.

If you need Support materials at any time you can access them at:

<http://support.ecanvasser.com/>

or you can contact us directly through the Chat box on the website:

<https://www.ecanvasser.com>