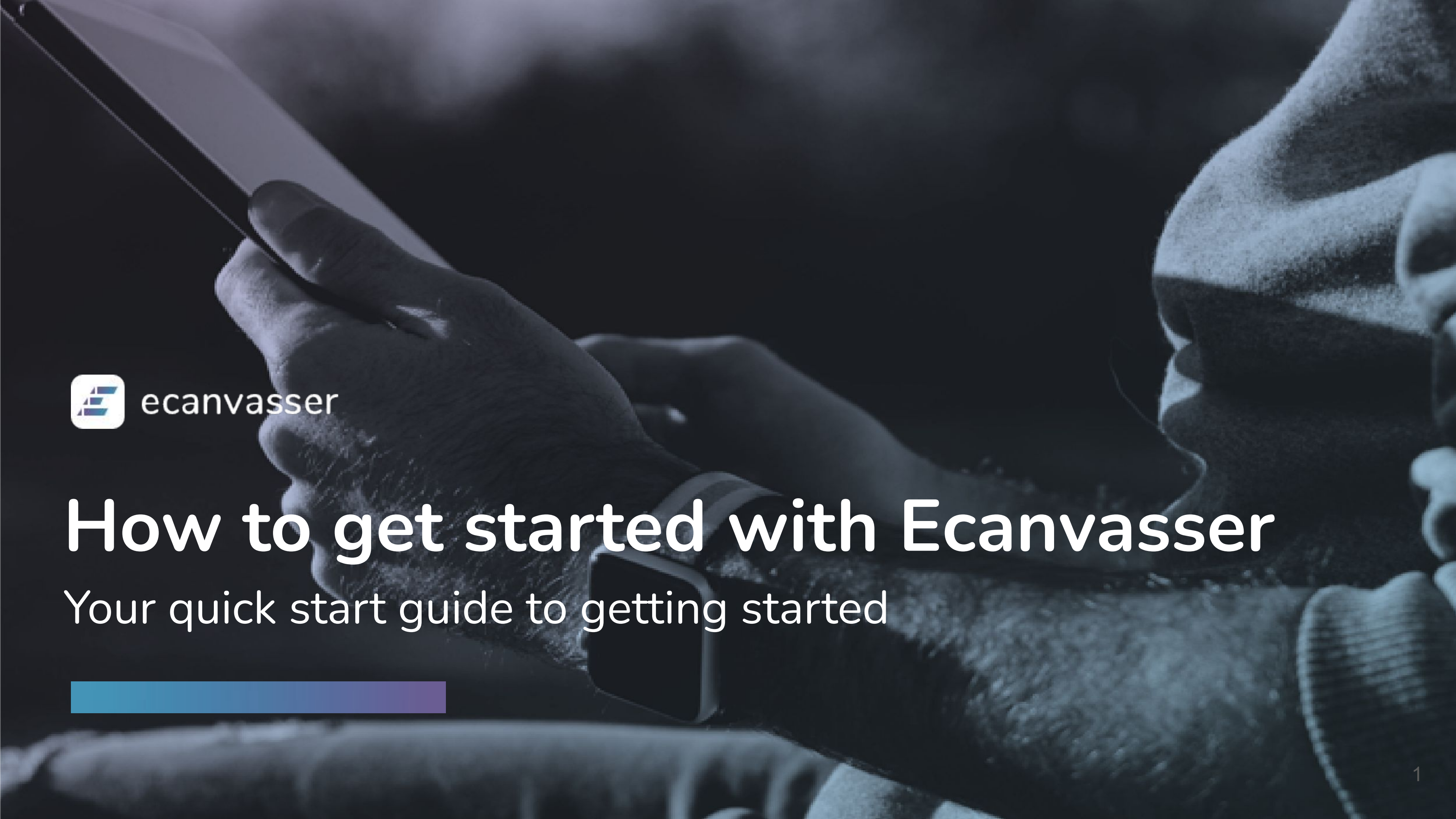


ecanvasser

How to get started with Ecanvasser

Your quick start guide to getting started

Welcome to Ecanvasser

The aim of this document is to get you familiarized with Ecanvasser, your digital organizing toolkit, that allows you to easily reach your community and build real relationships - both digitally and in the real world.

We will guide you through your first setup and highlight the key features to make certain that you are well equipped to achieve your goals.

As this is a quick guide to give you an overview of the Ecanvasser platform, we also highlight any related articles within each section for further reading, useful for when you need to learn more about a specific feature or core functionality.

If you have any additional questions, please contact the team: support@ecanvasser.com

Your quick start guide includes:

01 Login and your Dashboard

When you first login, you will have direct access to your dashboard. The homepage on the dashboard is the headquarters of your Ecanvasser account, which provides an overview of all of the activity within your Ecanvasser account.

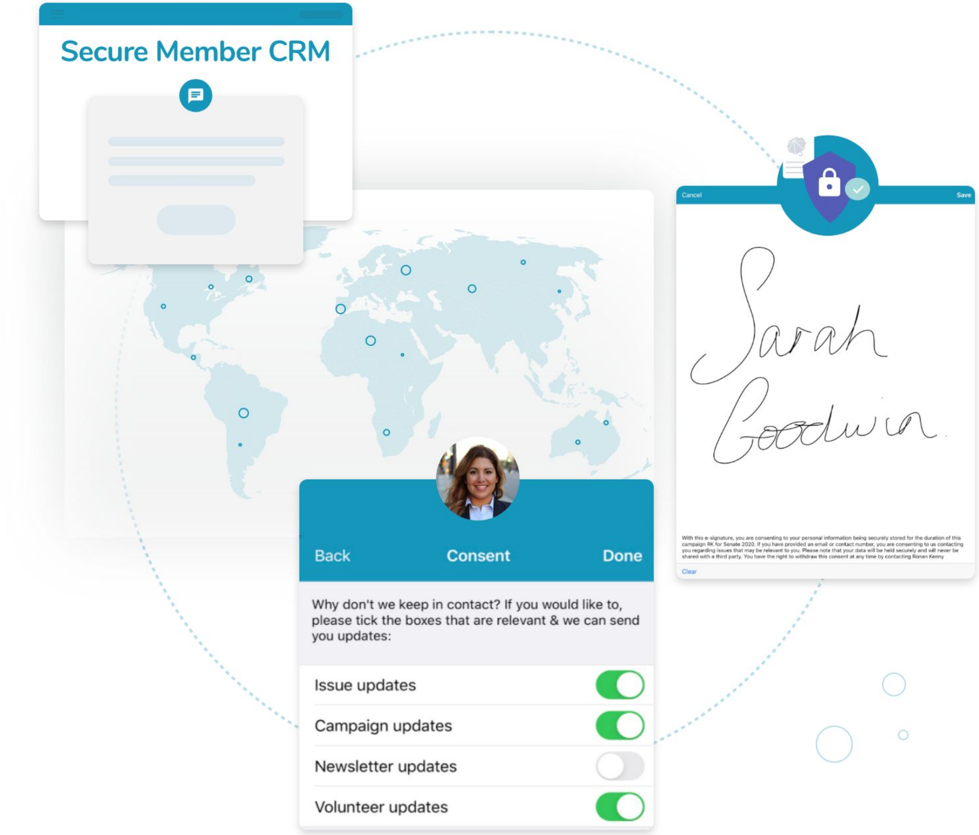
From here you can track your data, customize your app, manage your supporters and steer your project’s direction. You can also access the different sections of your dashboard from the navigation bar on the left side of your screen.

On the home page, you'll find an overview of your key metrics along with a real time activity feed.

RELATED SUPPORT ARTICLES

[Understanding your Account Page]()
[Navigating around your Dashboard]()

02 Privacy Dashboard



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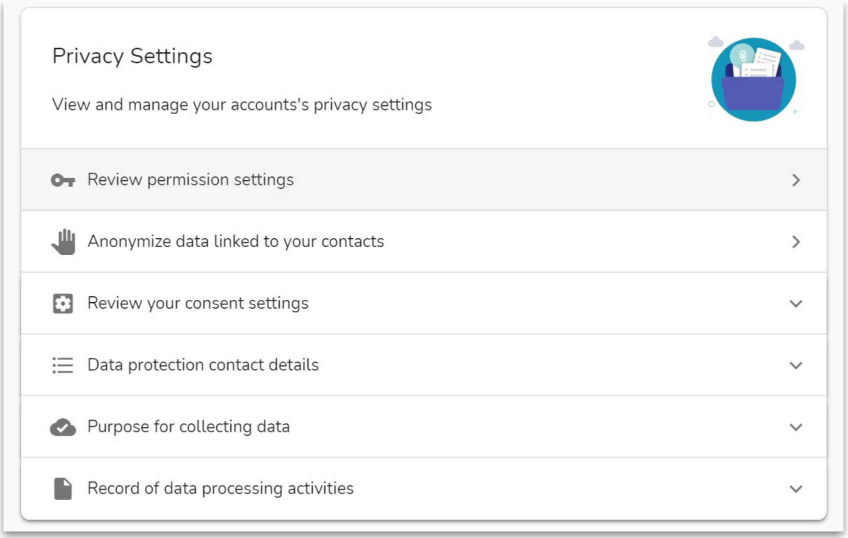
02 Privacy Dashboard

Data privacy and compliance is a continuing challenge for companies and organisations, and is not a concern just of the Data or IT departments. Your Privacy Dashboard is purposefully engineered to ease the burden of meeting your data privacy obligations which includes: permission controls, real time record of data processing activities, data map and collection purpose, privacy notice, contact details and data anonymization tool.

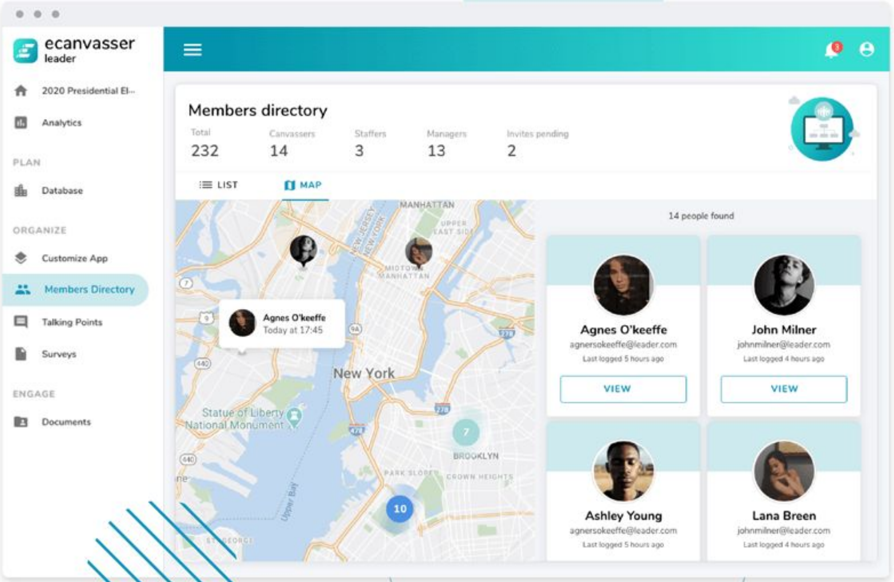
Your privacy dashboard centralises all of the data protection elements. From here you can view and manage your accounts privacy settings in one place. You can access it from the left navigation bar.



RELATED SUPPORT ARTICLES

[Compliance & Security]
[Your Privacy Dashboard]

03 Users and Teams



03 Users and Teams

It's all about teamwork and achieving goals together. With Ecanvasser you can add new members to your teams, assign specific permissions and then track their activities in real-time.

Different Types of Users

There are 5 different permissions levels for a Team member within your Ecanvasser Account. The person who created the account is the Account Owner.
There are 4 options for subsequent team members.

- Account Owner: Has access to all aspects of the Campaign, is the person who created the account and can't be modified.
- Account Manager: Has access to all features within the dashboard and mobile apps except billing administration (Account Owner may grant billing admin privileges to any account manager).
- Staffer: Has access to most features within the dashboard and mobile apps. Restricted from creating lists. No access to Analytics or Members Directory pages.
- Lead Organizer: Restricted access to mobile and dashboard. Unlimited access to all contacts.
- Organizer: Restricted access to mobile and dashboard. Access limited to assigned contacts.

Inviting Team Members

You can invite your team members from the section "Members Directory" on the left side of the dashboard by selecting the Invite User button. Invites are issued via email or phone. Here, you'll select the appropriate permission level.

Once your team members receive their email or SMS invitation, they will simply need to provide a few small details before they're granted appropriate access. As part of the process they will create a password themselves on the sign up link in their invite.

03 Users and Teams continued

Should you need to remove a member from your account you can do so from the section “Members Directory”. Selecting the user will bring you into the user’s profile. From here you can edit the users and delete them if necessary.

Members Directory

In the section “Members Directory” you can create teams, assign your members to different teams and assign lists and tasks to your teams. Doing so will speed up the assigning of contacts and tasks to a group of people rather than separately for each member. You can also review how a particular team is performing.

Useful Tip: You can add users to a pre-existing team using the Invite User button. You can create a team during the invite process and assign that invitee to that team which streamlines the team management process.

Otherwise, you can create a new team from the section “Members Directory” by selecting the Team View and the button “Create Team” and assigning team members to the team. To get an overview of a specific team, you can click on the name of the team. From here you can assign new members to the team, see how the team is doing by filtering different efforts and/or apps and see which surveys or talking points are assigned to the team. By clicking on the Trophy Icon you can access the team scoreboard page for an overall overview of your team's successes.

Useful Tip: This Team Scoreboard adds a level of gamification to your teams. Who is in the lead? How many interactions they have completed? Who has the highest conversion rate? etc. which adds a layer of fun for your organizers!

RELATED SUPPORT ARTICLES

Inviting your Team
Onboarding your Team
Members Directory

03 Users and Teams continued

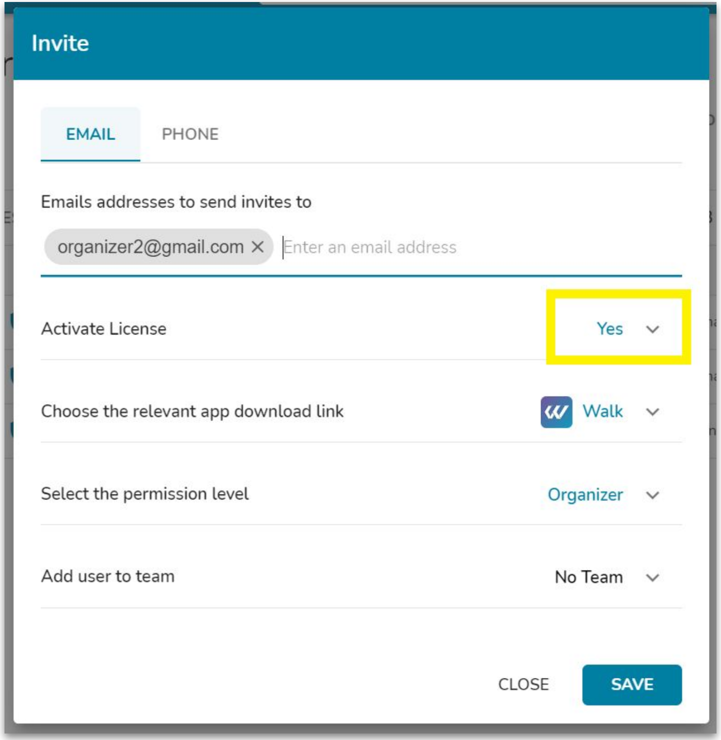
If you have billing permission, you can activate other users' licenses that are included in your subscription*.

Each time you give access to a user, you are assigning one license.

If users in accounts have not been assigned a license, they will not have access to the paid subscription features.

You can add more licenses to your account on a per-user basis.

*Applies to subscriptions created after 8th February 2021

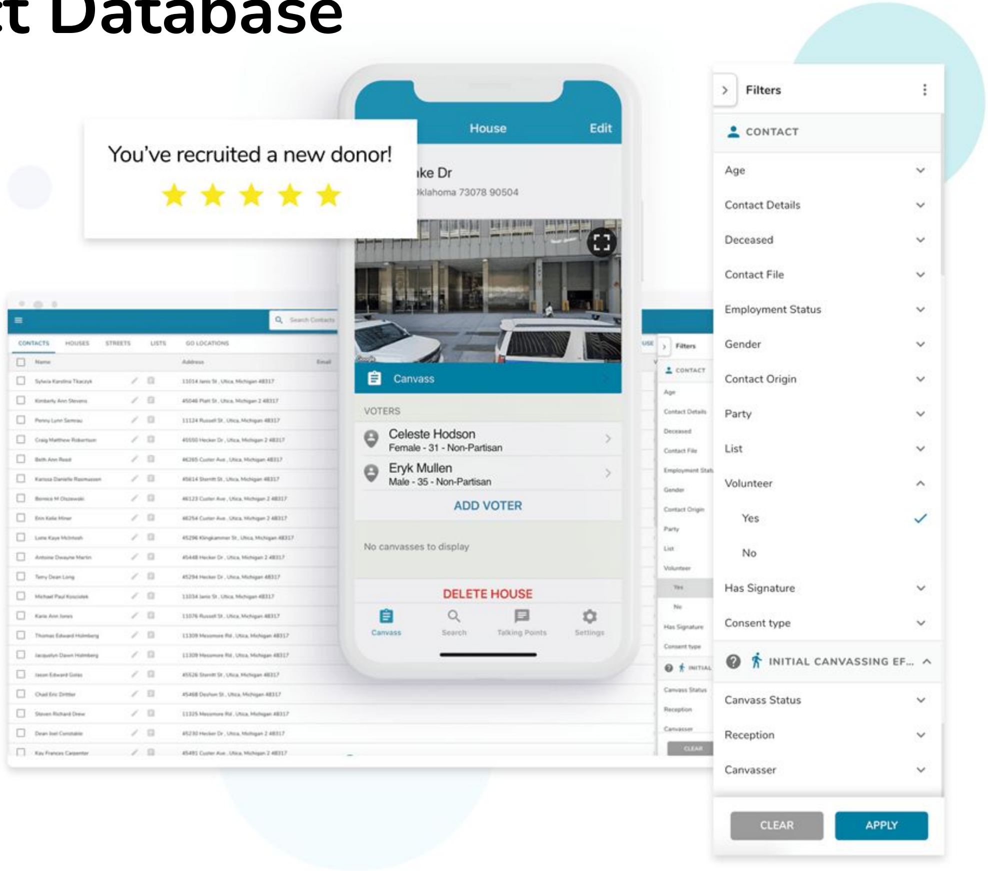


RELATED SUPPORT ARTICLES

[Manage User Licenses]

[Billing Admin]

04 Contact Database



04 Contact Database

The contact database is the foundation of any successful outreach campaign. You can either import contact data or build your own database from scratch. Once you have your contact database in your dashboard you can go ahead and filter it to create lists according to different parameters.

Importing your Contact File

Spending some time to ensure your contact file is formatted correctly is extremely important as your entire database will heavily utilize this file, and it's format.
Contact files can be: .xlsx, .xls, or .csv , and should aim to be a maximum size of 40mb.
If you need to upload a file larger than this, it may be split into multiple files for individual upload.

Any conflicts that arise from importing multiple contact files can be managed in the import process.

For more information on the contact file import and the contact file formatting take a look at the related support articles mentioned below this section.

Once you have your contact file ready you can upload it in the import section by going to "Import Data" page and selecting the upload option, you will then have to finalize your data by choosing a title for each column before beginning the import process.

Useful Tip: First Name, Surname, Street, City/Town, and State are mandatory fields when importing your contact file.

RELATED SUPPORT ARTICLES

Importing Contacts
Formatting Your Contact File
Troubleshooting Your Data Import

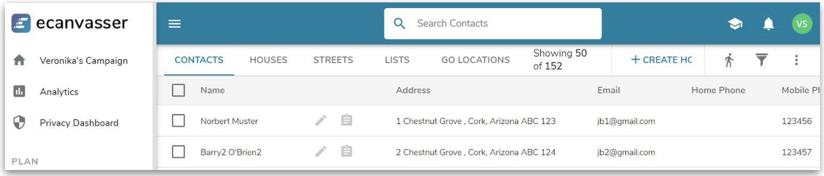
04 Contact Database continued

Starting your Database from Scratch

While a readily available data file can save you time you can also build your own database with a little bit of work prior to each engagement using spreadsheets or building your universe with the Walk and Go apps.

Overview of your Database

You can see your database arranged by different views depending on if you want to see all contacts, houses, streets or lists.



RELATED SUPPORT ARTICLES

[Managing your Database]

[How to Build a Database from Scratch]

04 Contact Database continued

Searching and Filtering

In order to target specific groups and to assign them to team members it's important to segment your database.

You have two options to segment your database:

1. The search function: Searches can be performed on Contacts, Houses, Streets, or Lists.
2. The filter function; It allows you to segment your contact database by information imported from your contact source for example a Contact File, Salesforce, NationBuilder, and or data that has been recorded by your field operators. Those are for example indicators such as age, gender or custom fields.

Exporting your contact File

If you wish to export your data Ecanvasser offers you three options: Walk lists, your contact database or the results from your outreach. After your export the file will be available in the section "Documents".

Useful Tip: Export is not available during the trial period on Ecanvasser. If you would like to export on trial contact support@ecanvasser.com

RELATED SUPPORT ARTICLES

Database Page: Searching & Filtering
Exporting Your Data
Printable Walk List
Database Export Function

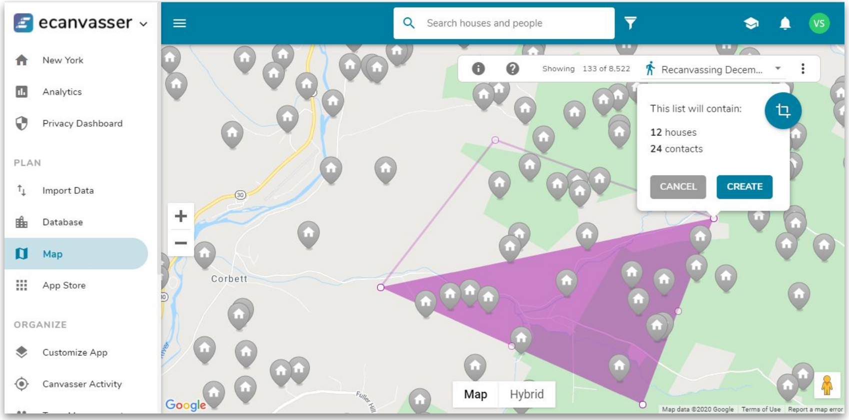
04 Contact Database continued

Creating Lists

Lists can be created on the Database page easily using the properties in your database, eg, District, Precinct, Age, etc. You can either create a new list or you can add to an existing list as necessary.

Another option is to create a list from the section "Map" by Turf Cutting. In this case you can choose a certain area based upon geography to create your segment of the database.

Once you created your lists you will find them in a separate tab in your database. From here you have an overview of your current lists and can edit the list name, assign a list to a team, export the lists, or delete a list

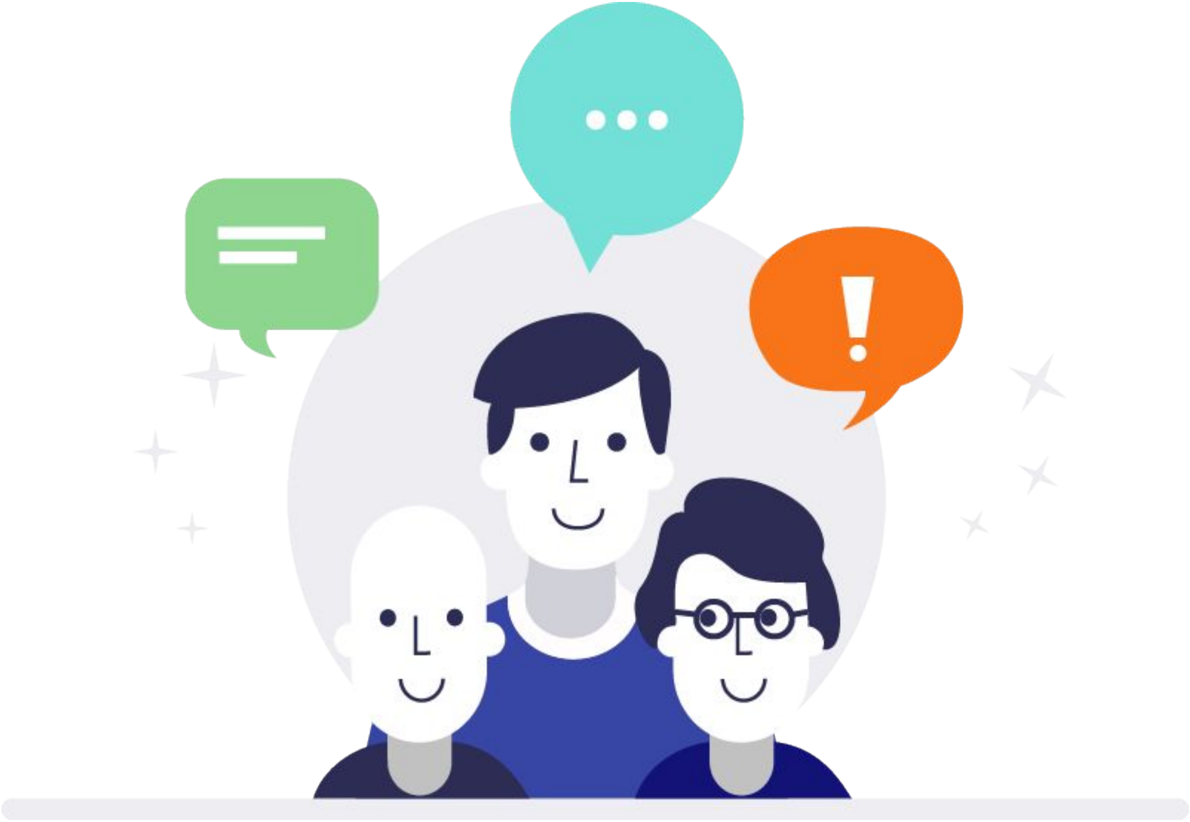


RELATED SUPPORT ARTICLES

[Database Page: Creating Lists]

[Map Page: Creating Lists and Cutting your Turf]

05 Preparing your Outreach



05 Preparing your Outreach

Now, that you have your contact files uploaded, all your members invited and you have your teams created, it's time to prepare the outreach!

Customizing the Account to your Needs

In the section "Customize" you can tailor the engagement flow to your account. What information should they collect during the interaction? What is important to your project? In which order should the conversation follow?

Use the Customize page to configure and customize the main aspects of your account including the management of: Custom Fields, Campaign Efforts, Interaction Statuses, Ratings, Surveys, Talking Points

Creating Efforts

Each round of engagement in Ecanvasser is called a "Campaign Effort". Campaign efforts are your organization's way of engaging your community.

Analytics data is effort specific, which means that this is an effective way to categorize your different forms of campaigning or contact.Creating different efforts will allow you to differentiate between various outreach occasions. You can use parallel efforts if you want to distinguish between whether someone has been contacted in a particular way or another. Using one effort after the other could be helpful if you need to archive a past outreach round.

RELATED SUPPORT ARTICLES

Customize Feature
Campaign Efforts

05 Preparing your Outreach continued

Custom Fields

They are designed to give you flexibility and control in managing your contacts. Custom Fields have two primary purposes:

(1) It allows you to import additional data points that Ecanvasser does not have a default field for.
(2) It's an additional data field for you to record information about your contacts, for example: are they interested in upcoming events, have they donated in the past etc

You can create new fields by clicking “create”. There are a number of field types that you can use, e.g. Text, Number, True/False or Multiple Choice. You can also give a custom field a default value also which saves input time when your teams are out in the field as they are simply picking from a pre-populated dropdown menu response.

Creating Talking Points

With Talking Points you can prep your team members the best way possible with short policy/movement positions. They ensure that your organizers are always on-message. You can create talking points from the Section “Talking Points” and create different categories of talking points. Afterwards you can assign them to all of your organizers or just certain teams.

RELATED SUPPORT ARTICLES

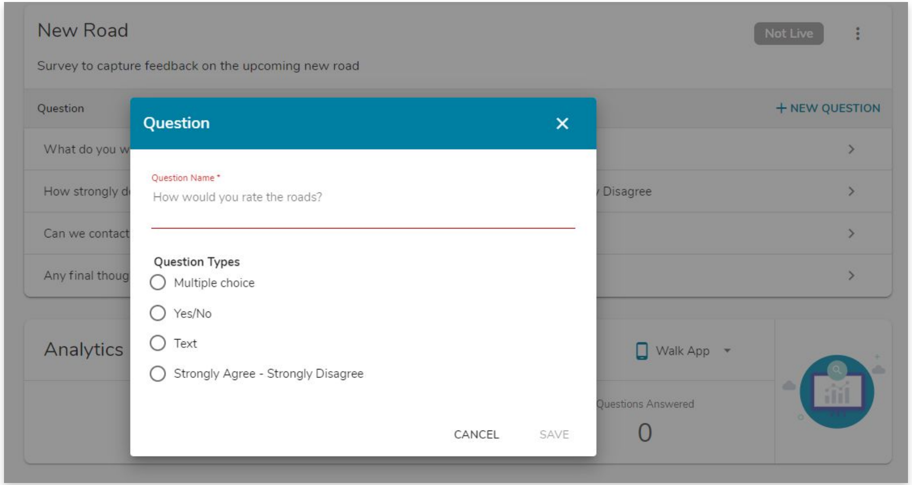
Custom Fields
Walk App: Talking Points

05 Preparing your Outreach continued

Creating Surveys

Ecanvasser gives you the ability to easily create your own surveys to get the answers you need for your account.

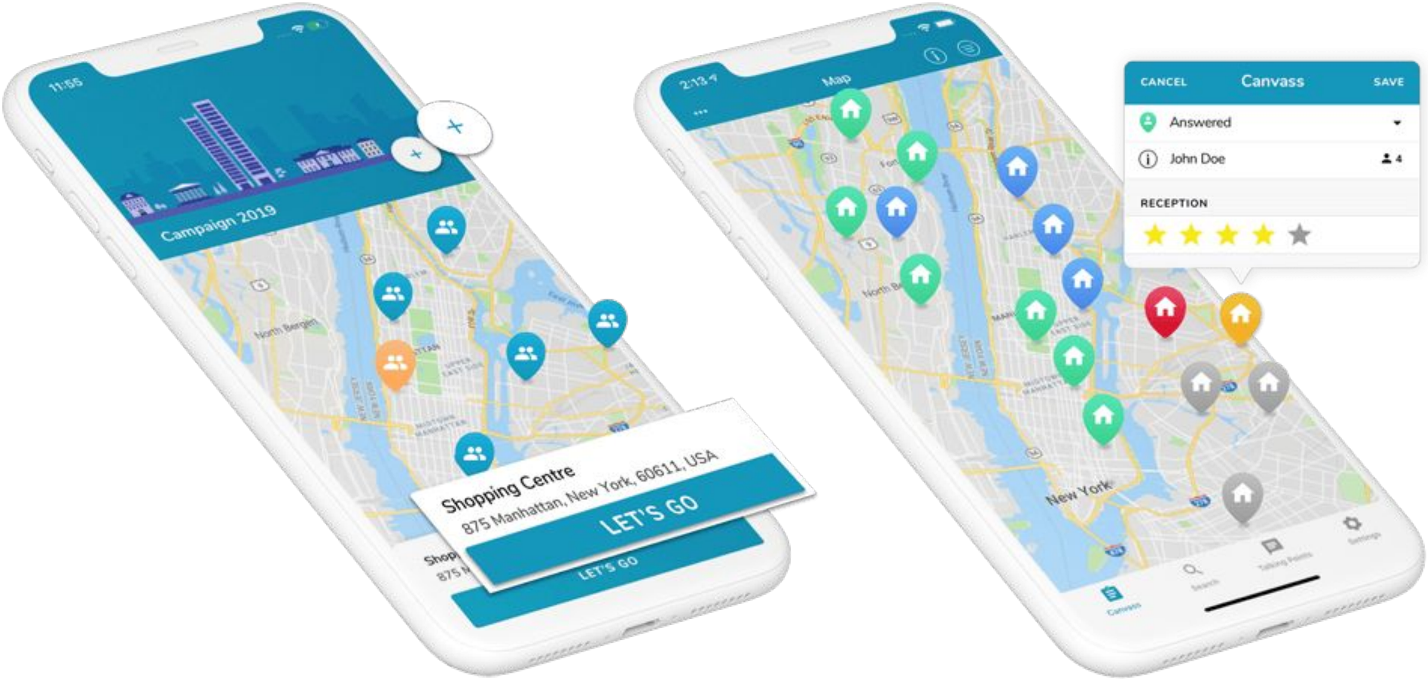
In the section “Survey” you can create your own surveys. Right after you selected a new survey you can give it a name and description and assign the survey to a team or to all users. The next step is to create questions for the survey with a variety of possible question types. The results of the surveys will be visible here as well as in the section “Analytics”.



RELATED SUPPORT ARTICLES

Surveys

06 Outreach using *Walk* and *Go*



06 Outreach using *Walk* and Go

Ecanvasser offers two apps for your community outreach needs. Your organizers can download the apps on their smartphones (Apple Store or Play Store) and have the prepared lists and customized engagement flow at their hands. After the outreach they simply need to sync their app in the settings section - and you have the data ready in your dashboard.

We'll give you a short overview of the specific use cases for each of the apps. You'll find further information about both apps in the related support articles.

Community Outreach with Ecanvasser Walk

The Walk app is geared to help those who are working off of a dedicated contact database that has uploaded and segment into lists via the Ecanvasser dashboard. Your team will be selecting specific contacts or houses to contact, and may have access to the entire database, or just a segment of it.

Useful Tip: You can create houses on the app, this allows you to grow your universe while contacting your current database too.

Community Outreach with Ecanvasser Go

The Go app does not rely on a pre-existing contact database, and interactions are aggregated to allow for a high level overview of the total engagements. Of course, you have the opportunity to create individual contacts if you like.

Useful Tip: Ecanvasser Go is based on Locations. Set up a Location and capture survey responses, or recruit new supporters in that area. The information captured will help to grow your organization in that area. Go Locations can be a place, an event, or even a specific type of engagement that is ongoing, eg, "Brendan's new member drive"

06 Outreach using *Walk* and Go

Raising Issues at the Community Outreach

During an outreach campaign, people who are interacted with may raise matters that you will need to follow up with. For example, a person who wants to speak to the candidate, an issue that a supporter mentions or someone who wants more information on a specific topic.

Issues can be logged as open text from both the Walk and Go apps and will be synced to your dashboard for you to follow-up on them.
These will populate in the Caseworker section on the dashboard.

RELATED SUPPORT ARTICLES

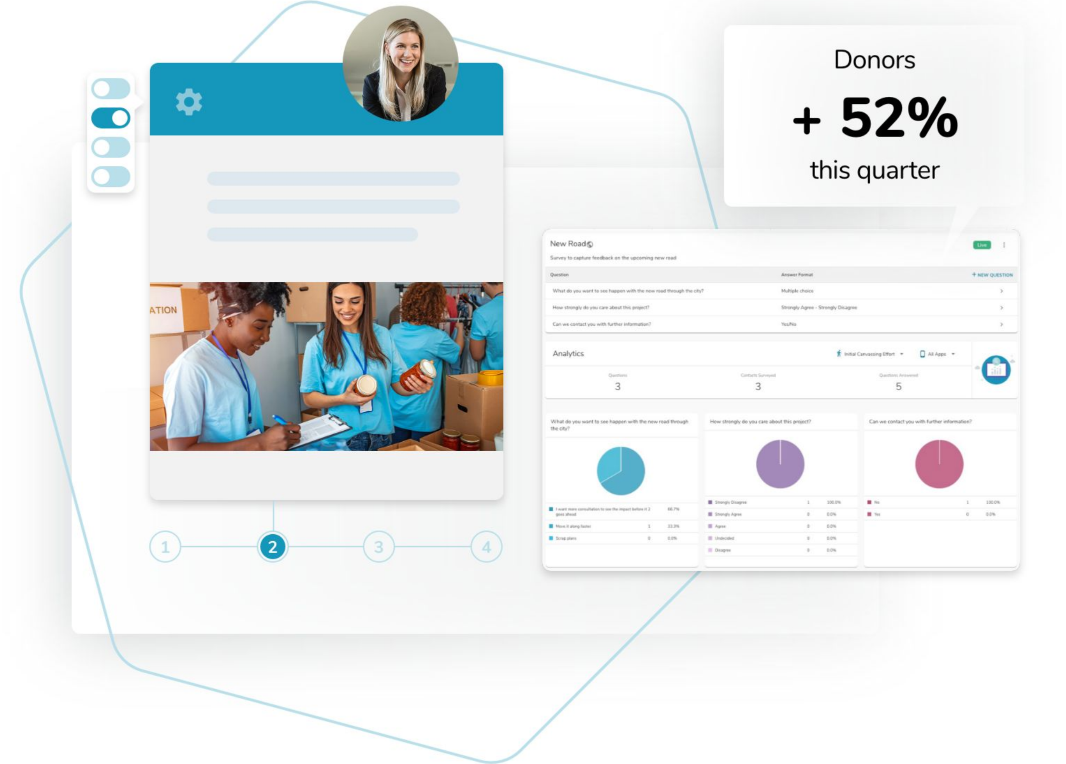
Ecanvasser Apps: Walk or Go?
Walk App: Getting Started
Go App: Getting Started
Walk App: Interactions
Go App: Interactions
Field Tracking

Field Tracking

Tracking organizer movements and organizer activity is a necessary part of any field organizing operations for a variety of reasons ranging from auditing, security and efficiency management. You can view your organizers in real-time, with access to relevant information which will enable you to meet your operational needs.

All your organizer activity information is located on the Field Tracking page within your Ecanvasser dashboard. You can drill down into each organizer's audit trail to view a comprehensive list of their recorded interactions, with a traffic light alert system to highlight any discrepancies between the recorded location of the interaction compared to the address of the house that was visited.

07 Post-Engagement



07 Post-Engagement

As soon as your team has synced their apps you'll have all the data back to your dashboard and can track the progress of your account on the Analytics page.
Now might also be a good time to follow up with raised issues and questions through the Caseworker.
You can use any information gathered to send emails, SMS or social media posts through our Ecanvasser integrations with third-party software.

Analytics

Your analytics page provides you with an abundance of data, and statistics, on how your account is developing; providing you with the necessary insights to decide on a course of action.

Within the Analytics page, you'll see an overview of all the interactions overview, as well as results from surveys, breakdown of demographic data, comprehensive analysis of custom fields, performance of lists etc.

You can filter by different campaign efforts and apps.

All the data is exportable to a csv file, which allows you and your team to take a deep dive into the information that is captured. Exported files can be accessed via the section "Documents". As larger exports take some time to generate, you will receive an email once the export file is ready to download.

RELATED SUPPORT ARTICLES

Advanced Analytics

07 Post-Engagement

Caseworker

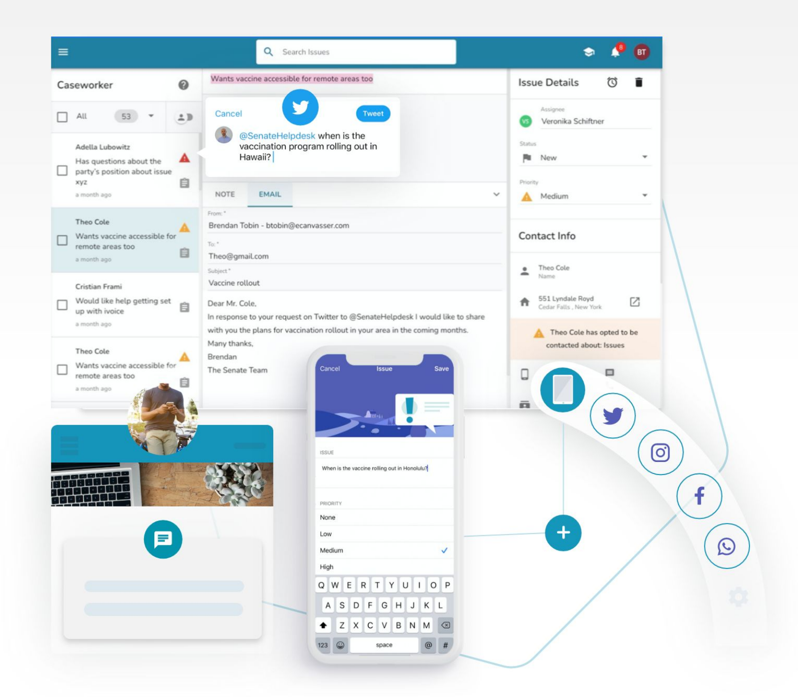
In the section “Caseworker” you can manage the issues and follow-up on the issues by email.

At first you can filter for issues and assign them to different team members.

Next, you can respond to questions by choosing “Email”. Here you can set a reminder, reassign case, update status, or update priority.

There are 3 main parts to the Issues page:

- New Issue
- Filtering
- Issue Details



RELATED SUPPORT ARTICLES

[Understanding Caseworker](#)
[Collecting Issues During Outreach Activities](#)

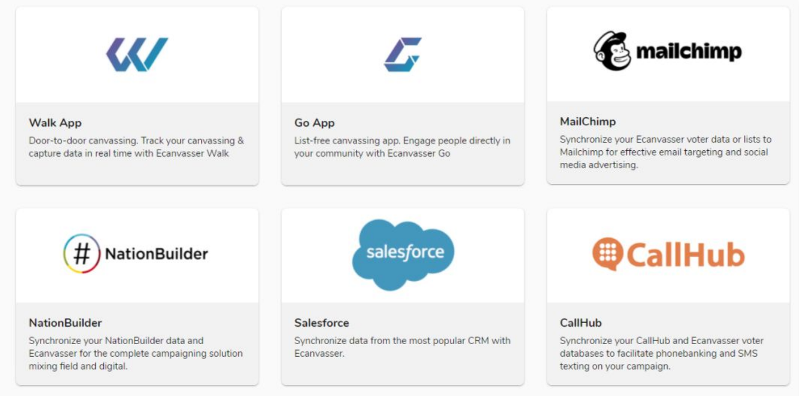
08 Additional Features

Integrations

Ecanvasser offers many integrations so that you can utilize the data from your outreach the best way possible.
Currently, Ecanvasser offers integrations with:

- Mailchimp
- NationBuilder
- Salesforce
- CallHub

You will find the available integrations in your left navigation in the section "App Store". From here, you can download the two Ecanvasser Apps Walk and Go or establish the link the other services that you are using



RELATED SUPPORT ARTICLES

Integrate Salesforce & Ecanvasser
How to integrate CallHub with Ecanvasser
How to integrate Mailchimp with Ecanvasser
Linking your Nation with Ecanvasser

Enjoy creating the most impact using the world's best organizing software

If you have any additional questions please contact:
support@ecanvasser.com

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