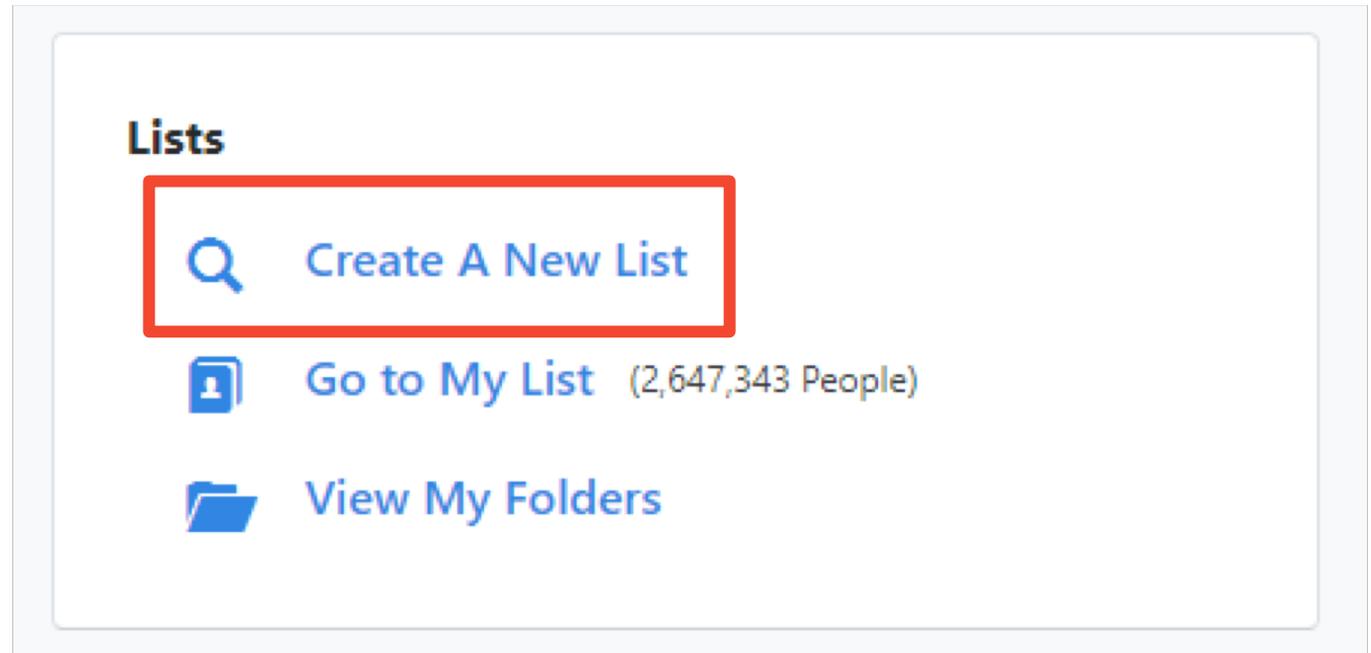


**NCDEMOCRATS**

**FOR CHECK-IN:**  
**Making a List of County  
Convention Delegates**

Select "Create A New List" on the main menu



Select the target for 2019 County Convention Delegates

▼ Targets

Include people in  of the following:

- NCDP: PLEO - County Executive Committee : County Executive Committee
- NCDP: PLEO - Precinct Meeting Targets : Party Officials and Past Attendees
- NCDP: PLEO - Precinct Meeting Targets - Expanded Engagement Target
- 2019 County Convention Delegates : 2019 County Convention Delegates

Go to the "Home Districts" section and select your county

▼ Home Districts

Search for Districts that have been applied to a person's physical Voting Address.

Media Market

County

Precinct

City

Congressional

State Senate

State House

On the right side select the green "Run Search" button

### ← Step 1: New Search

**Districts**  
County = Orange

**Targets**  
Target = 2019 County Convention Delegates: 2019 County Convention Delegates

**Registration**  
Registration Status = Registered Active or Registered Inactive or Applicant

**Suppressions**  
exclude Deceased  
and include Good or Bad Voting Address  
and include Good or Bad Mailing Address  
and include NCOA Mailing Address  
and include Do Not Email

...less

🔍 Preview My Results

+ 476 People

+ Add Step

▶ Run Search

# Select the "Print" button

CONTACTS

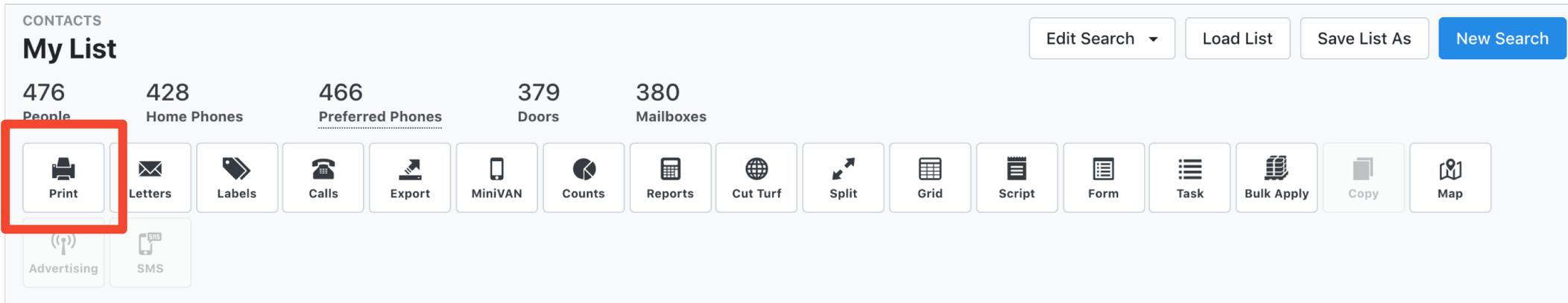
## My List

476 People   428 Home Phones   466 Preferred Phones   379 Doors   380 Mailboxes

Edit Search ▾   Load List   Save List As   **New Search**

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

Advertising   SMS

A screenshot of a web application interface for managing contact lists. The interface is titled 'CONTACTS My List'. It shows a list of contact categories with counts: 476 People, 428 Home Phones, 466 Preferred Phones (underlined), 379 Doors, and 380 Mailboxes. On the right side, there are four buttons: 'Edit Search' with a dropdown arrow, 'Load List', 'Save List As', and 'New Search' (highlighted in blue). Below these buttons is a horizontal row of 16 icons representing different actions: Print, Letters, Labels, Calls, Export, MiniVAN, Counts, Reports, Cut Turf, Split, Grid, Script, Form, Task, Bulk Apply, Copy, and Map. The 'Print' button is highlighted with a red rectangular box. Below this row are two more buttons: 'Advertising' and 'SMS'.

- Select the "2019 County Convention Reporting" report format
- Select the "Meeting" contacted how
- Give your title a unique name
- For Sort Order1 select "precinct" and select "Asc" and "Page Breaks"
- For Sort Order2 select "Name" and select "Asc"

DATA ENTRY

## Print

Report Format\* 2019 County Convention Report [Preview](#)

Script

Contacted How\* Meeting

Title Orange County Convention

MiniVAN Campaign ?

Clear Sort Order

Sort Order1 Precinct  Asc  Desc  Show Group Header  Page Breaks

Sort Order2 Name  Asc  Desc  Show Group Header  Page Breaks

On the next  
screen select  
"My PDF Files"

## PDF File

### Your PDF is being created.

If you have a large list, the PDF creation process may take a few minutes to complete. To check on your file(s) at any time, go to the [Main Menu](#) and look for a link that says [My PDF Files](#).

Or go back to [My List](#).

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Select the  
"Download File"  
button next to  
the PDF you  
want printed

Main Menu / PDF Print Jobs Help Wiki

DATA EXPORTS  
**PDF Print Jobs**

Created From: mm/dd/yyyy Created To: mm/dd/yyyy Created By: Riley, Calahan

Type: Title:  Map Region Source Folder:

[Remember Filters](#) [Clear](#) [Refresh](#)

[PDF Printing Instructions](#) [Download Selected Files](#)

<input type="checkbox"/>	Title	Type	Created	Created By	File Size	Download Link	Delete
<input type="checkbox"/>	35.3 Precinct Meeting	List	12/4/17 5:10 PM	Riley, Calahan	40 KB	<a href="#">Download File</a>	<a href="#">Delete</a>

1 PDF Print Job · 1 Page

**NCDEMOCRATS**

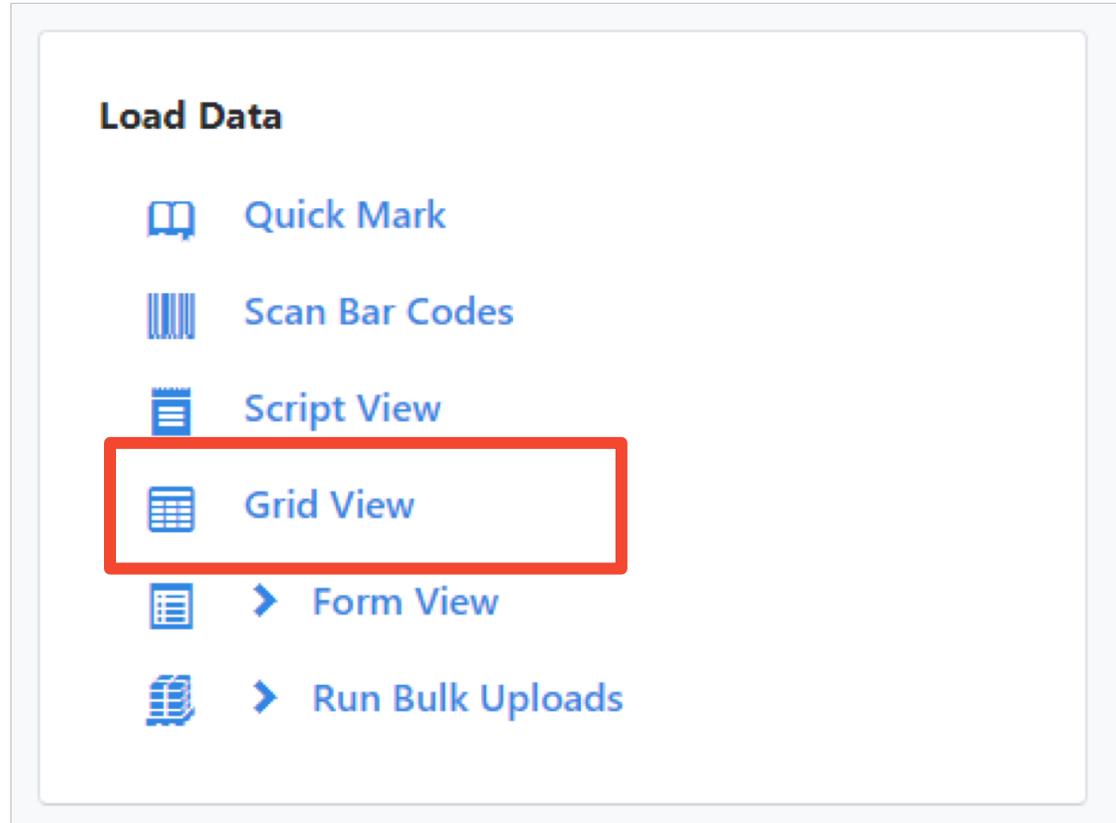
**FOR DATA ENTRY:**

(After the convention)

**Enter Data Grid View**

(A majority of the data entry will be done  
in Grid View).

On the main menu select "Grid View" under "Load Data"



Enter the list number found on the the bottom left hand corner of your printed check-in packet

35.3 Precinct Meeting · List 23043711-43182 · Page 1 Generated 12/4/17 5:10 PM

DATA ENTRY  
**Grid View**

Which list do you want to use?

Use My List

Let me enter a List Number  -

Use Quick Look Up

[Next](#)

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- Select the "2019 County Convention Reporting" Script
- Set the "Date Canvassed" as the meeting date
- Select "Contacted How" as "Meeting"

DATA ENTRY  
**Grid View**

Script\* 2019 County Convention Reporting

Canvasser\* Szufliita, Vicky [Add New Canvasser](#)

Date Canvassed\* 3/22/19

Contacted How\* Meeting

Clear Sort Order

Sort Order1 Precinct  Asc  Desc

Sort Order2 Name  Asc  Desc

# Select the correct activist codes for people

DATA ENTRY  
Grid View

Records: 1 - 20 of 476  
Voter File VANID: [ ]

Contacted By: Szufliita, Vicky  
Date: 3/22/19  
How: Meeting

Voter File VANID	Name	Address	City	Party	Age	Phone	Result	Canvasser	2019 Cty Con Attend	19-21 CD Exec Com	19-21 County Secty	19-21 County Treasr	19-21 County Chair	2019 CD Delegate
[ ]	Last Name, First Ne													
[ ]	Last Name, First Ne													
[ ]	Last Name, First Ne													
[ ]	Last Name, First Ne													
[ ]	Last Name, First Ne													

**NCDEMOCRATS**

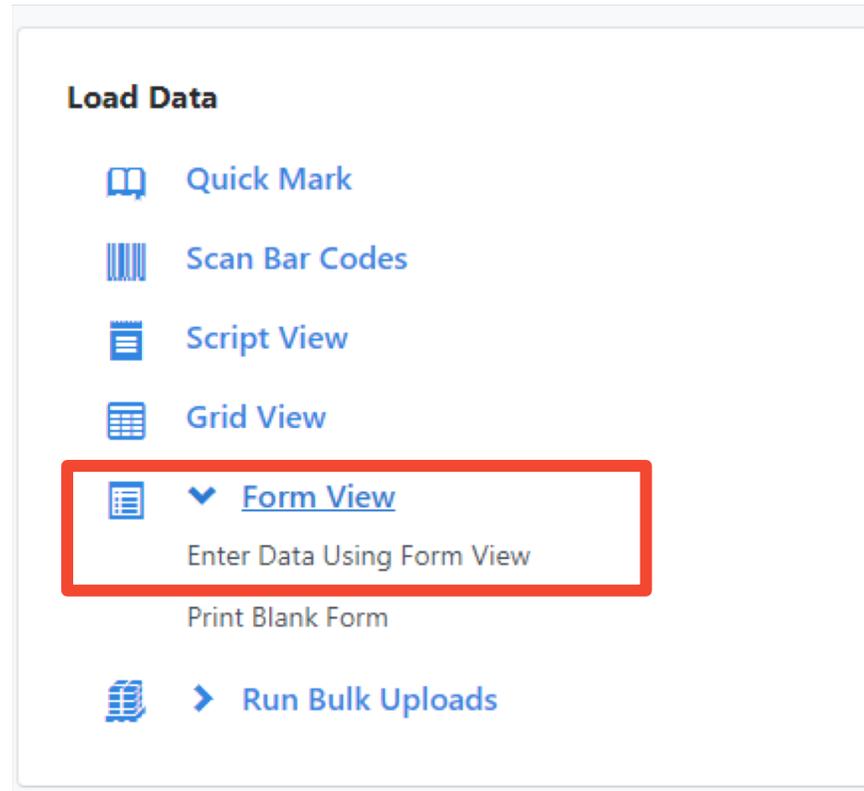
**FOR DATA ENTRY:**

(After the convention)

**Enter Data Form View**

(Only for entry of people who, for whatever reason, did not have a county convention delegate activist code at the time of the convention).

Select "Form View" under "Load Data"



Select "Use Quick Look Up"

DATA ENTRY  
**Form View**

Which list do you want to use?

Use My List

Let me enter a List Number  -

Use Quick Look Up

Scan Bar Codes

Next

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- Select the "2019 County Convention Form"
- Set the "Date Canvassed" as the meeting date
- Set "Canvass Type" as "Meeting"

**Form View**

Form\* 2019 County Convention Form

Canvassed By\* Szufilita, Vicky NC [Add New Canvasser](#)

Date Canvassed\* 3/22/19

Canvass Type\* Meeting

Enter the name and county for the person then hit the "Blue" search button

CONTACTS  
**Form View**

Last Name	First Name	Middle Name	Nickname	Phone	DOB	ID
<input type="text" value="Szufлита"/>	<input type="text" value="Victoria"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text" value="Voter File VANID"/>

Voter File VANID

Street Address	City	Zip	Email	County	County Voter ID
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text" value="Orange"/>	<input type="text"/>

Use SmartName search technology  Exclude Unregistered Voters

# Select the name of the person once you have found them

CONTACTS  
**Form View**

Last Name	First Name	Middle Name	Nickname	Phone
<input type="text" value="Szufliita"/>	<input type="text" value="Victoria"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

Voter File VANID

Street Address	City	Zip	Email	County
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text" value="Orange"/>

Use SmartName search technology  Exclude Unregistered Voters

Name	Address	City
<a href="#">Szufliita, Victoria</a>	201 Nc 54 Apt 207	Carrboro

# Enter the activist codes, phone numbers, or emails you have for them

Contacted By Szufлита, Vicky 		Date 3/22/19 	How Meeting  	 cl	
First Name Victoria	Middle Name	Last Name Szufлита			
Voting Address 201 Nc 54 Apt 207 Carrboro, NC 27510		Home Phone	<input type="text"/> - <input type="text"/> - <input type="text"/>	Mobile Phone	<input type="text"/> - <input type="text"/> - <input type="text"/>
<input type="checkbox"/> 19-21 1st County VC <input type="checkbox"/> 19-21 2nd County VC <input type="checkbox"/> 19-21 3rd County VC <input type="checkbox"/> 19-21 CD Exec Com <input type="checkbox"/> 19-21 County Chair <input type="checkbox"/> 19-21 County Secty <input type="checkbox"/> 19-21 County Treasr <input type="checkbox"/> 19-21 SEC Member <input type="checkbox"/> 2019 CD Delegate <input type="checkbox"/> 2019 Cty Con Attend		Email <input type="text"/>			