NCDEMOCRATS

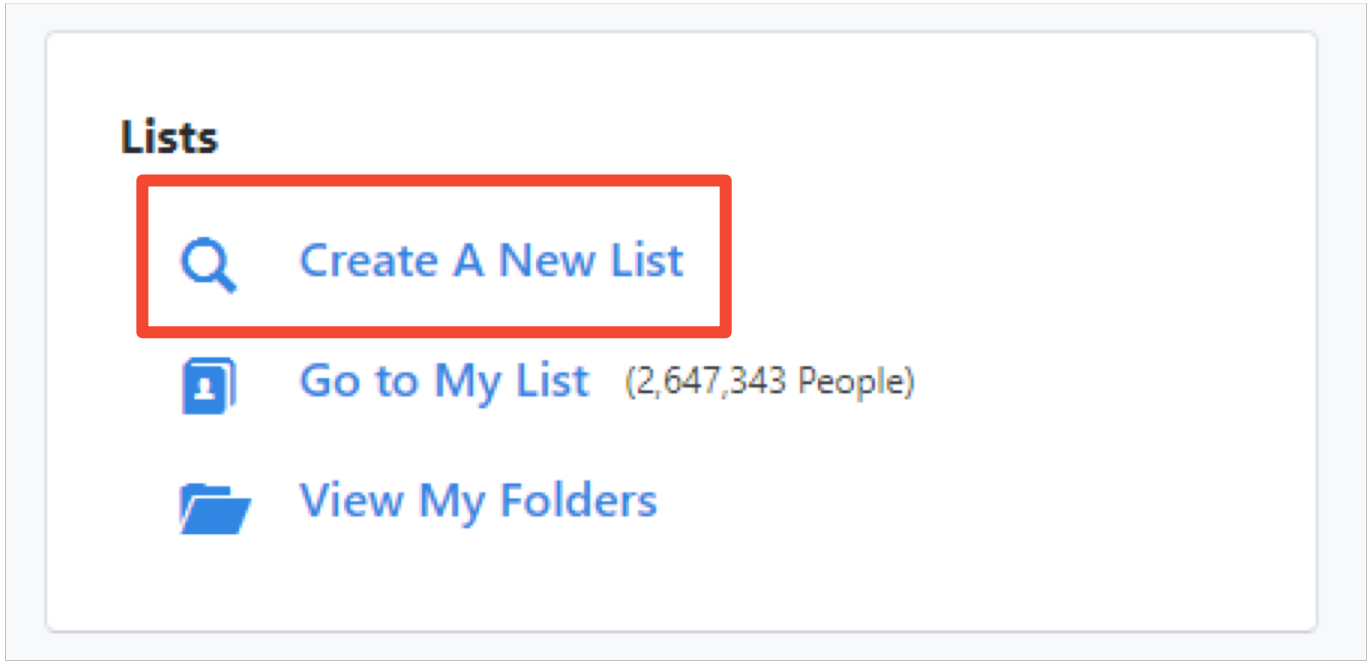
CHECK-IN

BEFORE THE CONVENTION:

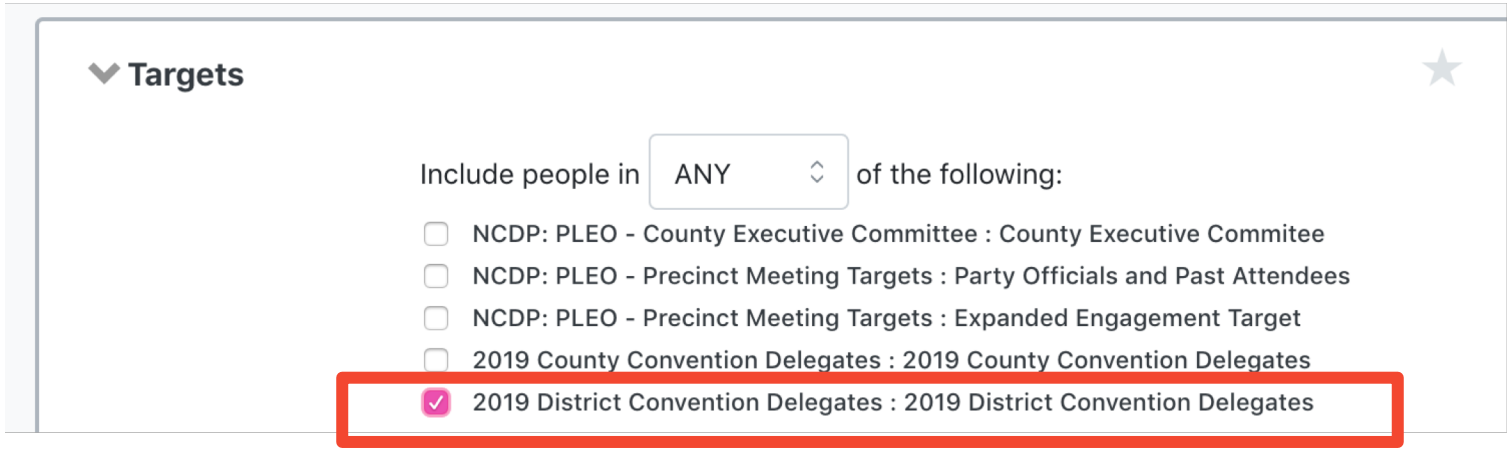
Making a List of District Convention Delegates

In this step, you will make a printed list of District Delegates you can use for check-in at the convention.

Select “Create A New List” on the main menu

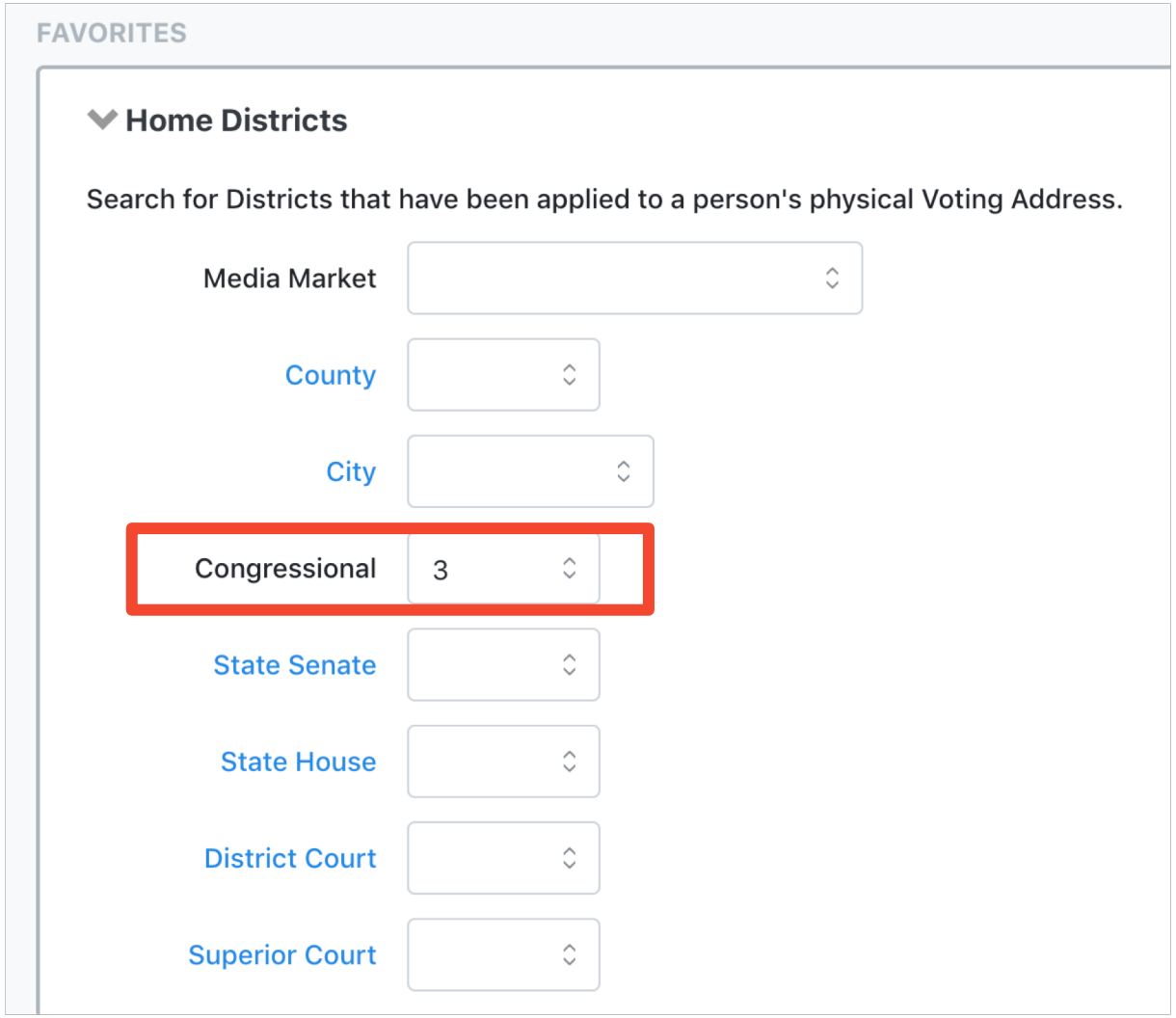


Select the target for “2019 District Convention Delegates”



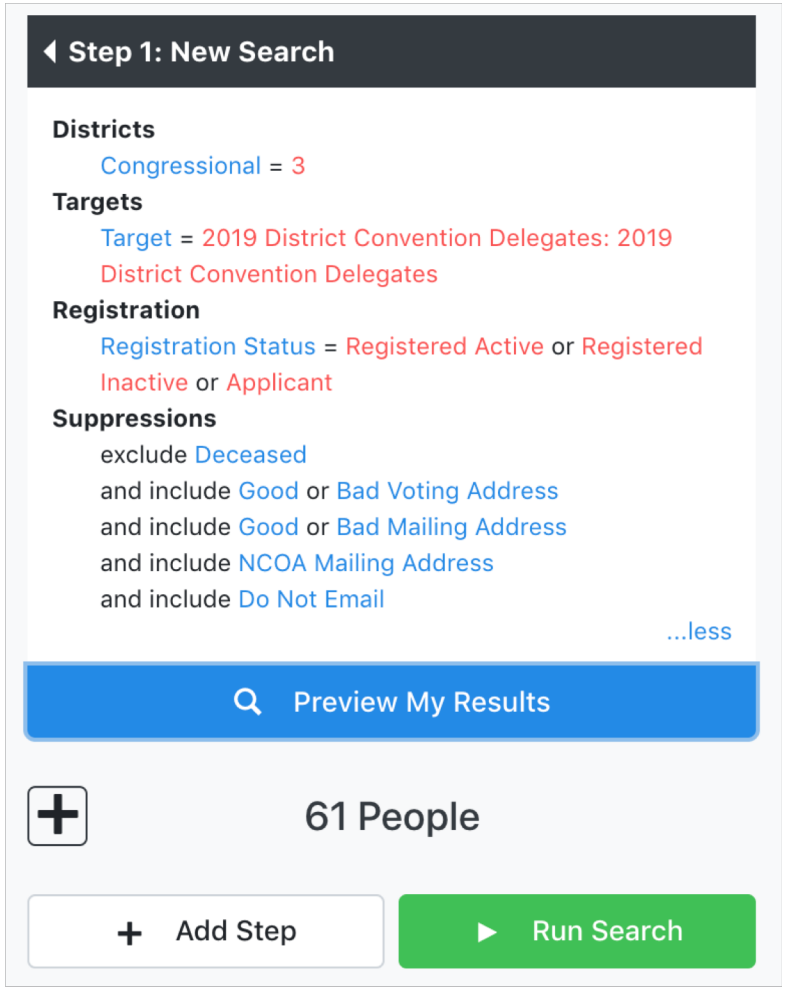
NCDEMOCRATS

Go to the “Home Districts” section and select your district

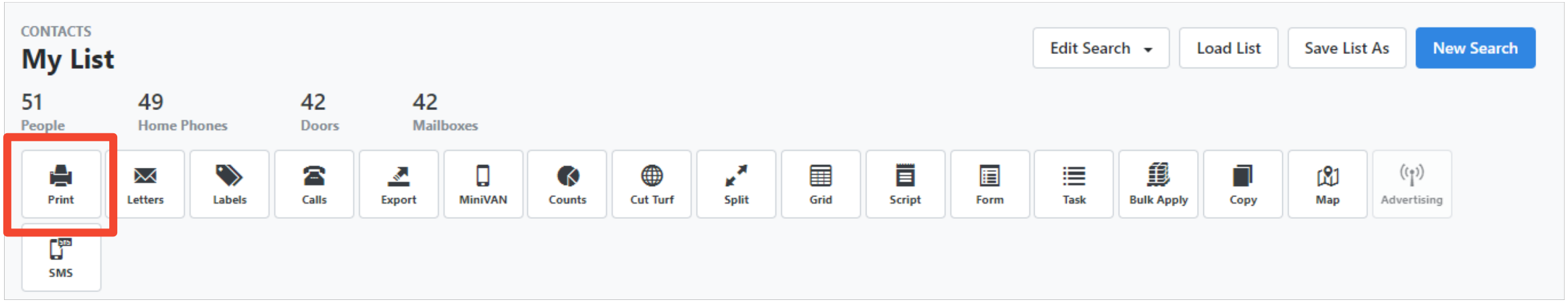


NCDEMOCRATS

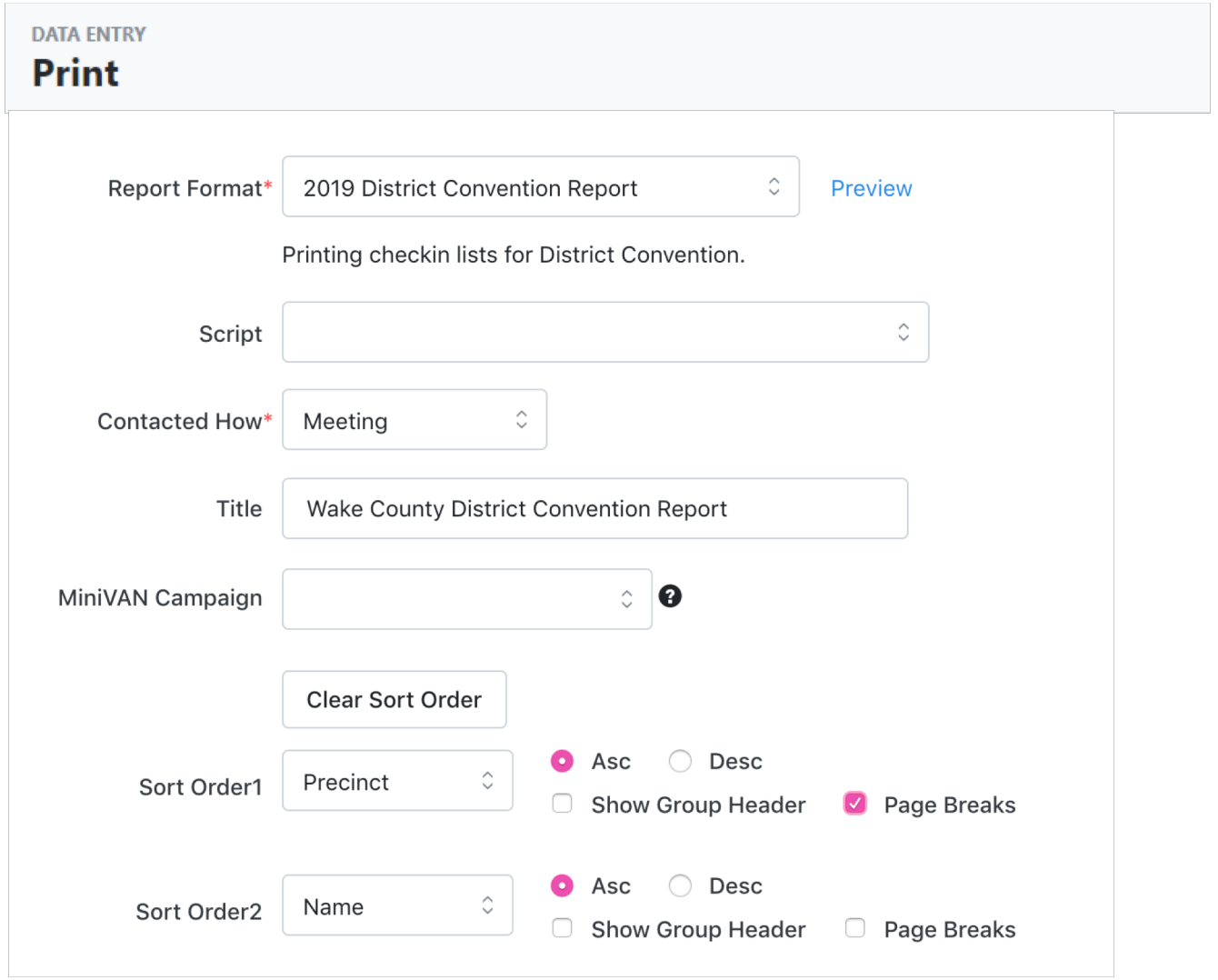
On the right side select the green “Run Search” button



Select the “Print” button



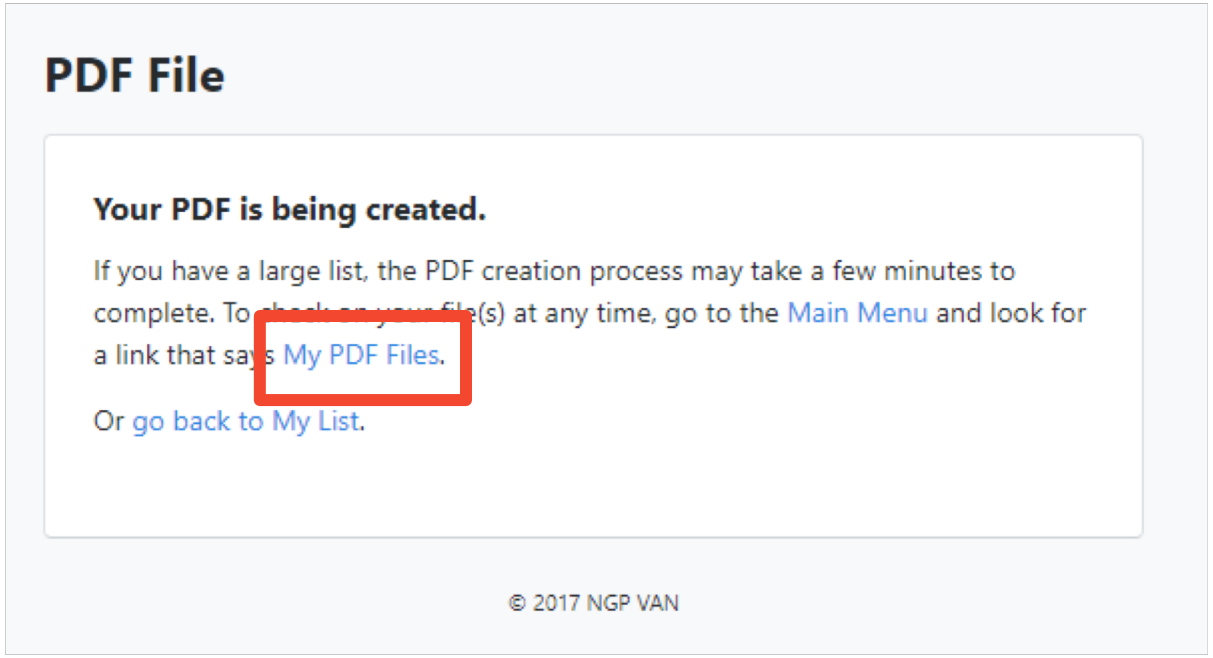
- Under “Report Format” Select –– “2019 District Convention Report”
- Under “Contacted How” Select ––“Meeting”
- Give your title a unique name
- For Sort Order1 select “county” and select “Asc” and “Page Breaks” **
- For Sort Order2 select “Name” and select “Asc”



**Doing sort order will break the list by precinct, and put names in alphabetical order, so check-in is more easily organized.

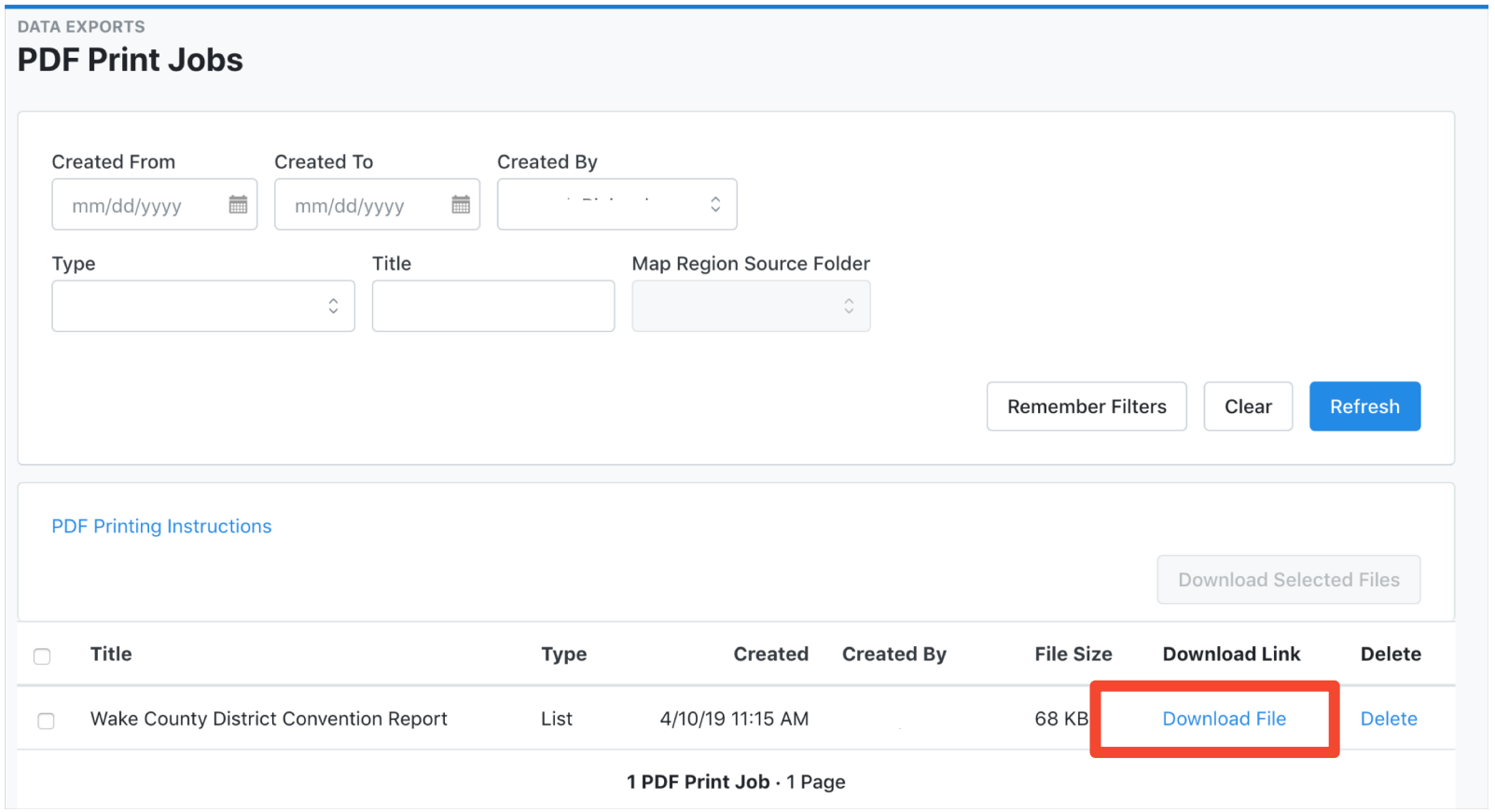
NCDEMOCRATS

On the next screen select “My PDF Files”



NCDEMOCRATS

Select the “Download File” button next to the PDF you want printed



NCDEMOCRATS

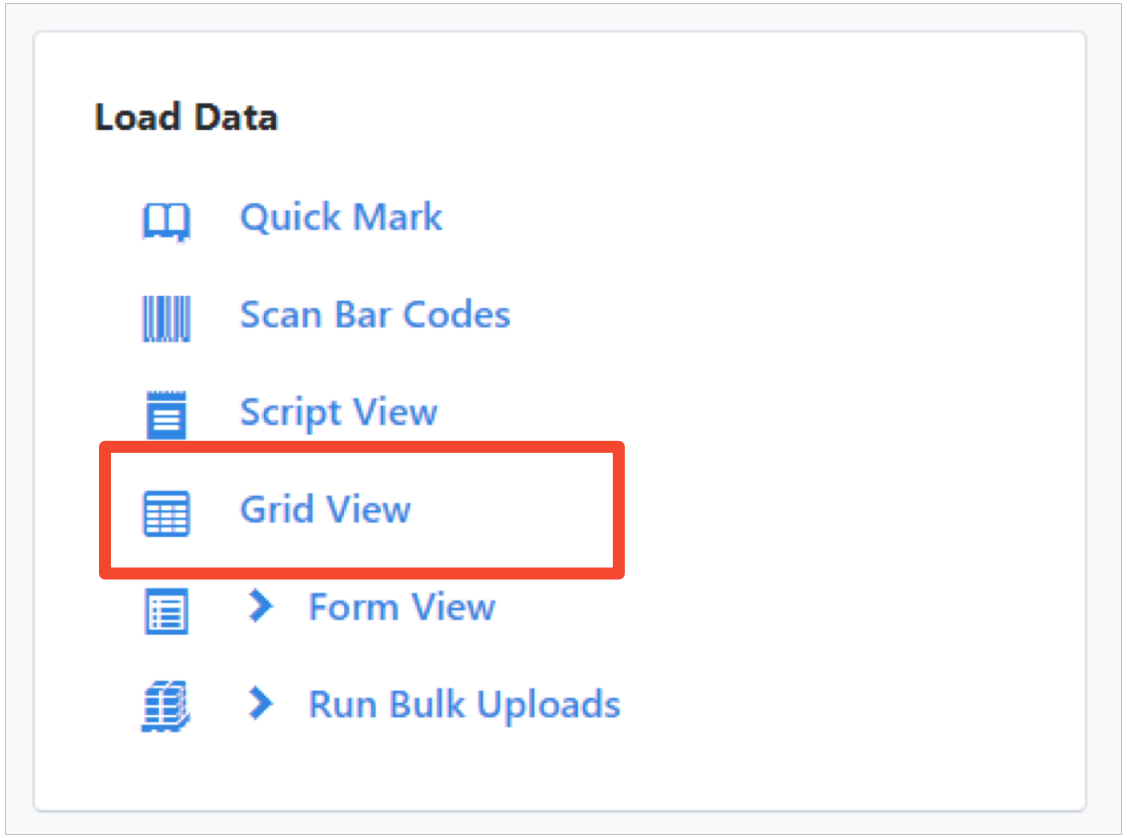
DATA ENTRY

AFTER THE CONVENTION:

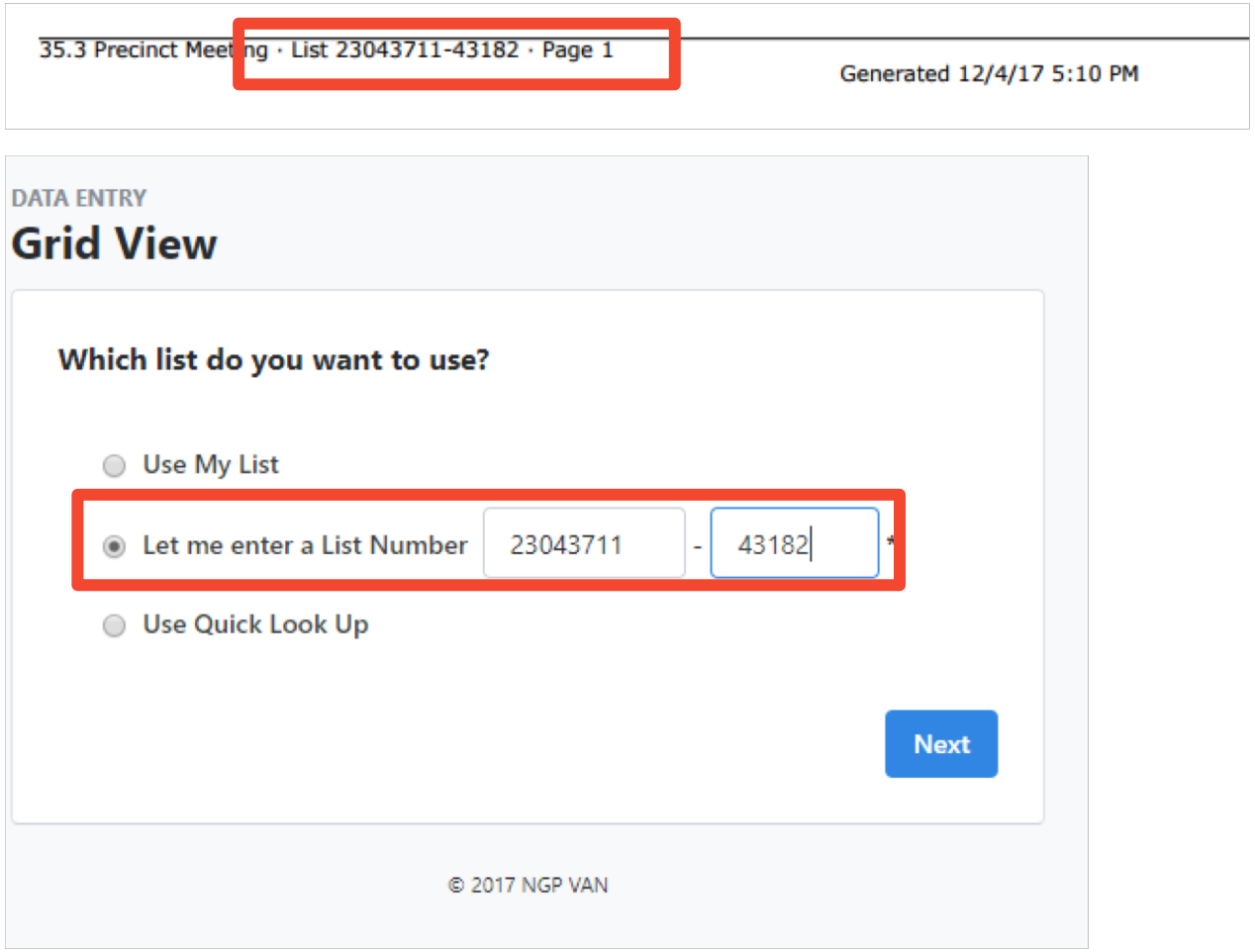
Enter Data Grid View

In this step, you will use a pre-made script to quickly check off activist codes for people who attended/were elected. It will connect to names on your check-in list.

On the main menu select “Grid View” under “Load Data”

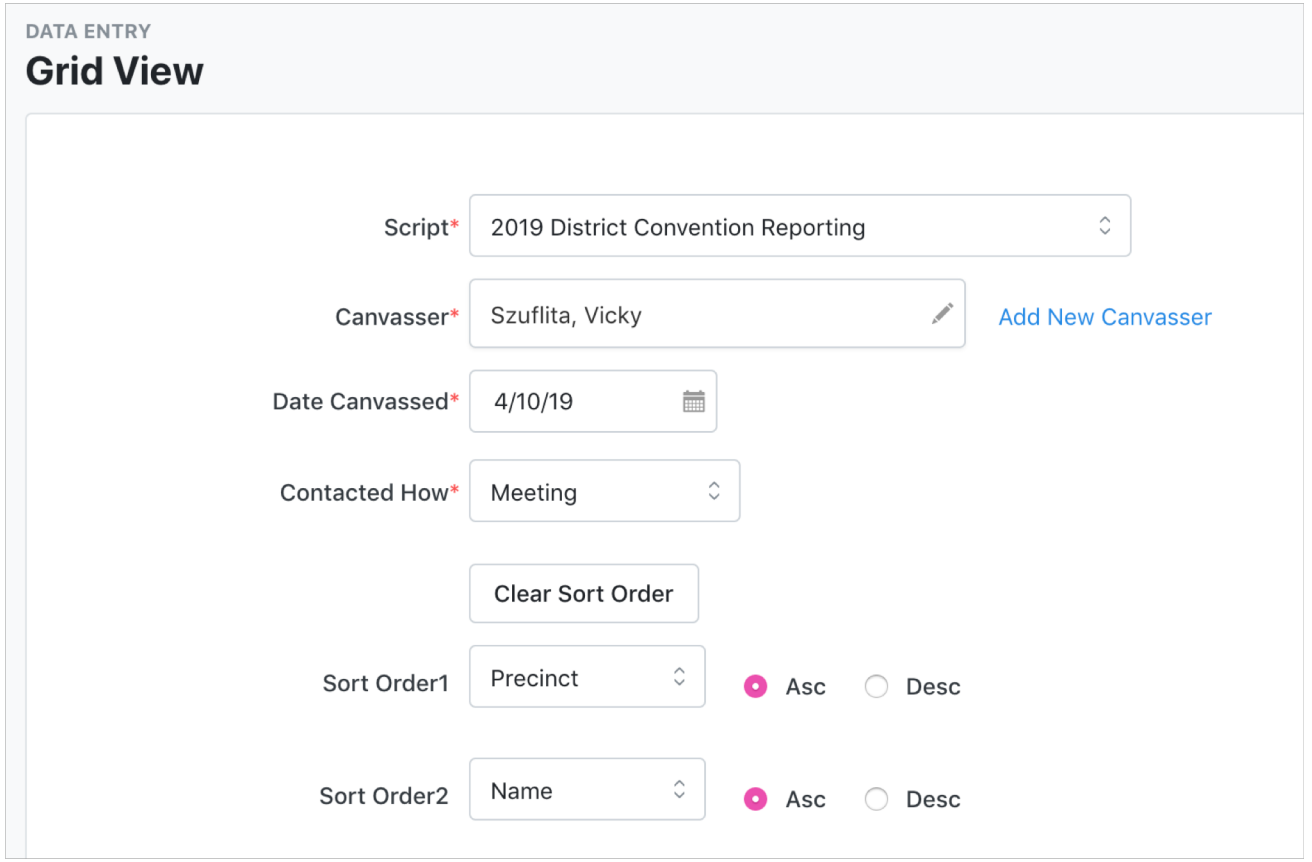


In the bottom left hand corner of your packet enter the list number



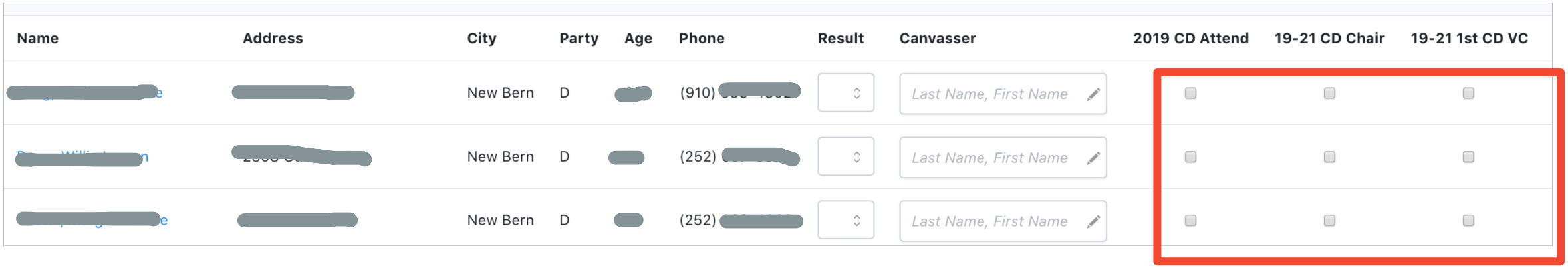
NCDEMOCRATS

- Select the “2019 District Convention Report” Script
- Set the “Date Canvassed” as the meeting date
- Select “Contacted How” as “Meeting”



NCDEMOCRATS

Select the correct activist codes for individuals



NCDEMOCRATS

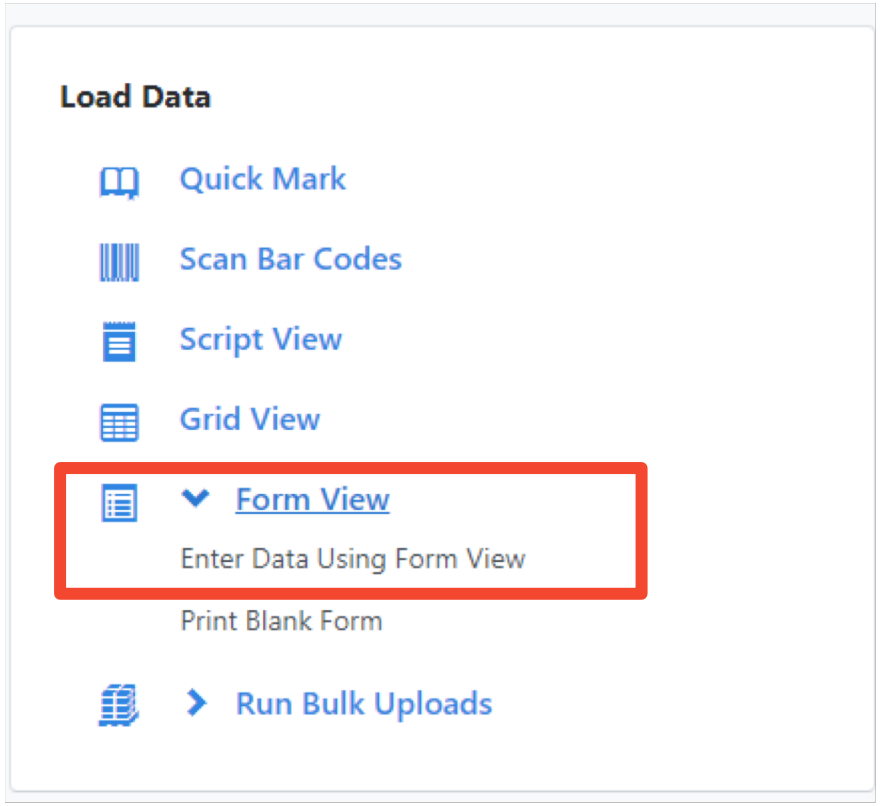
DATA ENTRY

AFTER THE CONVENTION:

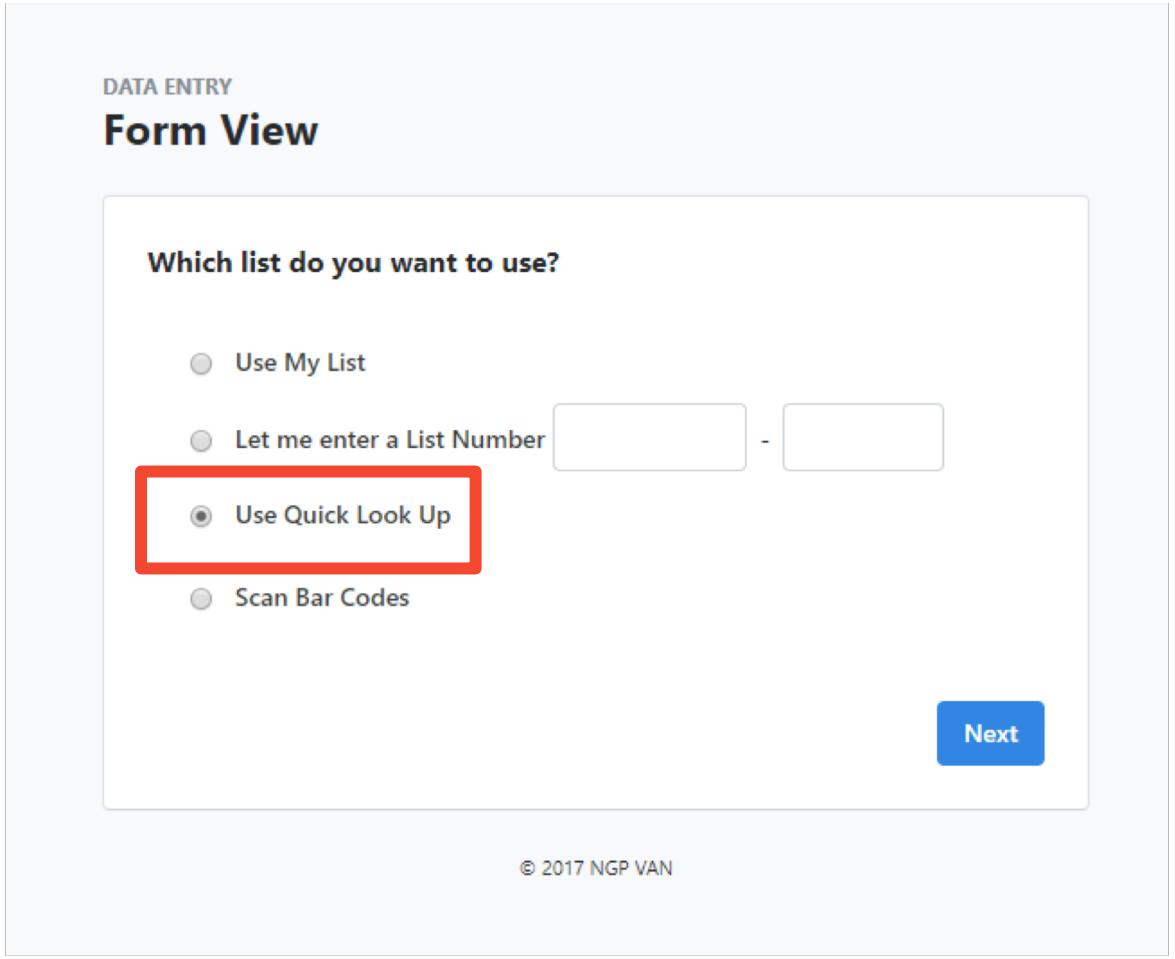
Enter Data Form View

This is for applying activist codes by individual, if you did not create a check-in list of delegates, or if a person was not on that list. In this step, you will use a pre-made form to quickly check-off activist codes for people who attended and were elected.

Select “Form View” under “Load Data”

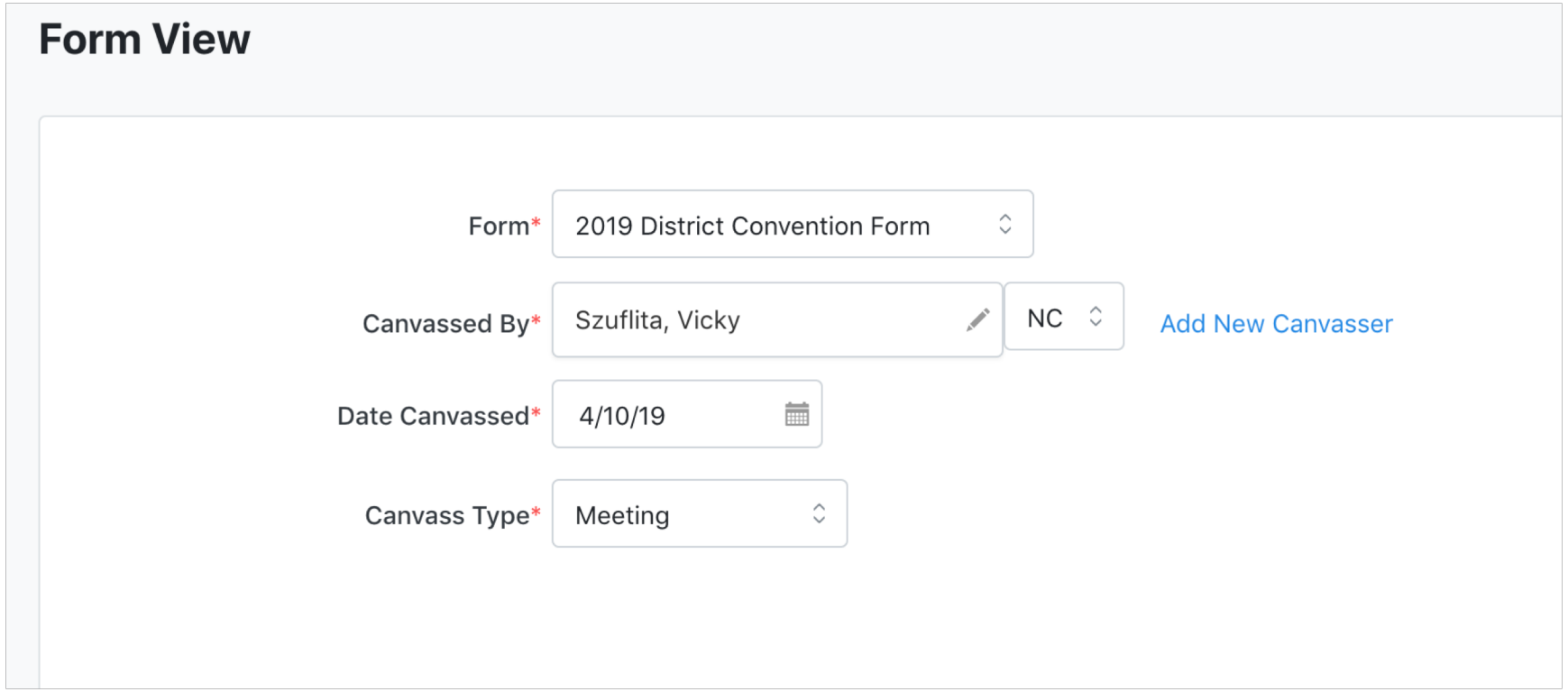


Select “Use Quick Look Up”



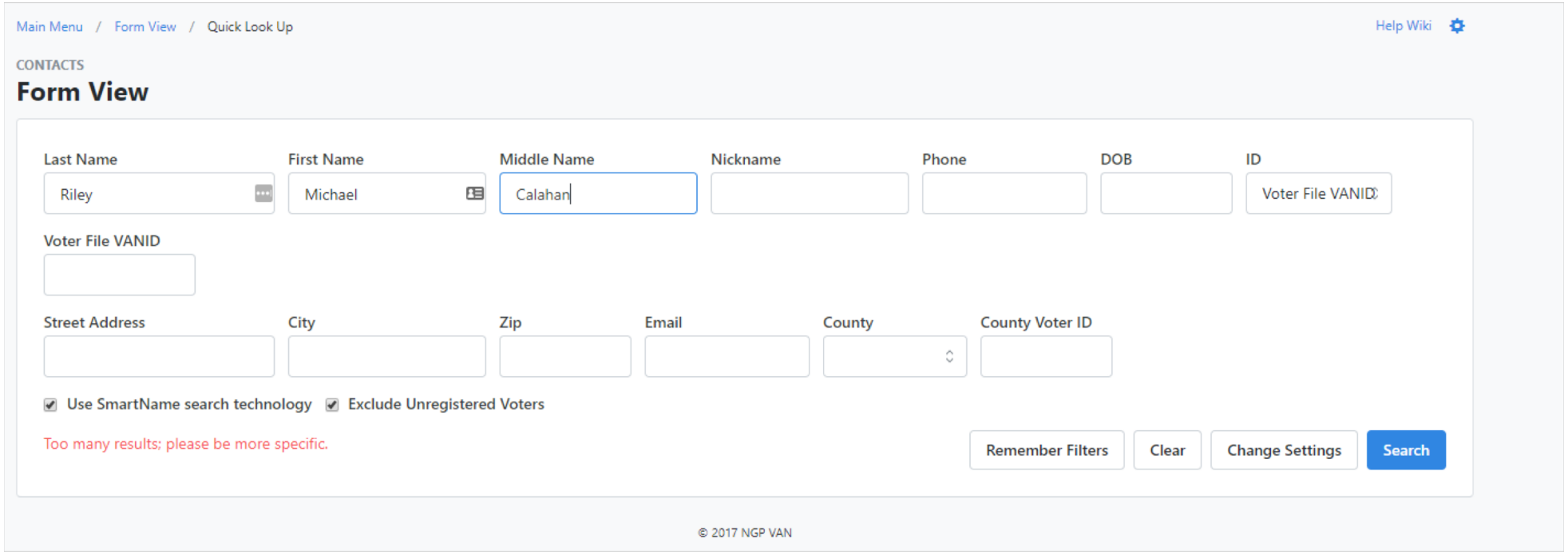
NCDEMOCRATS

- Select the “2019 District Convention Form”
- Set the “Date Canvassed” as the meeting date
- Set “Canvass Type” as “Meeting”



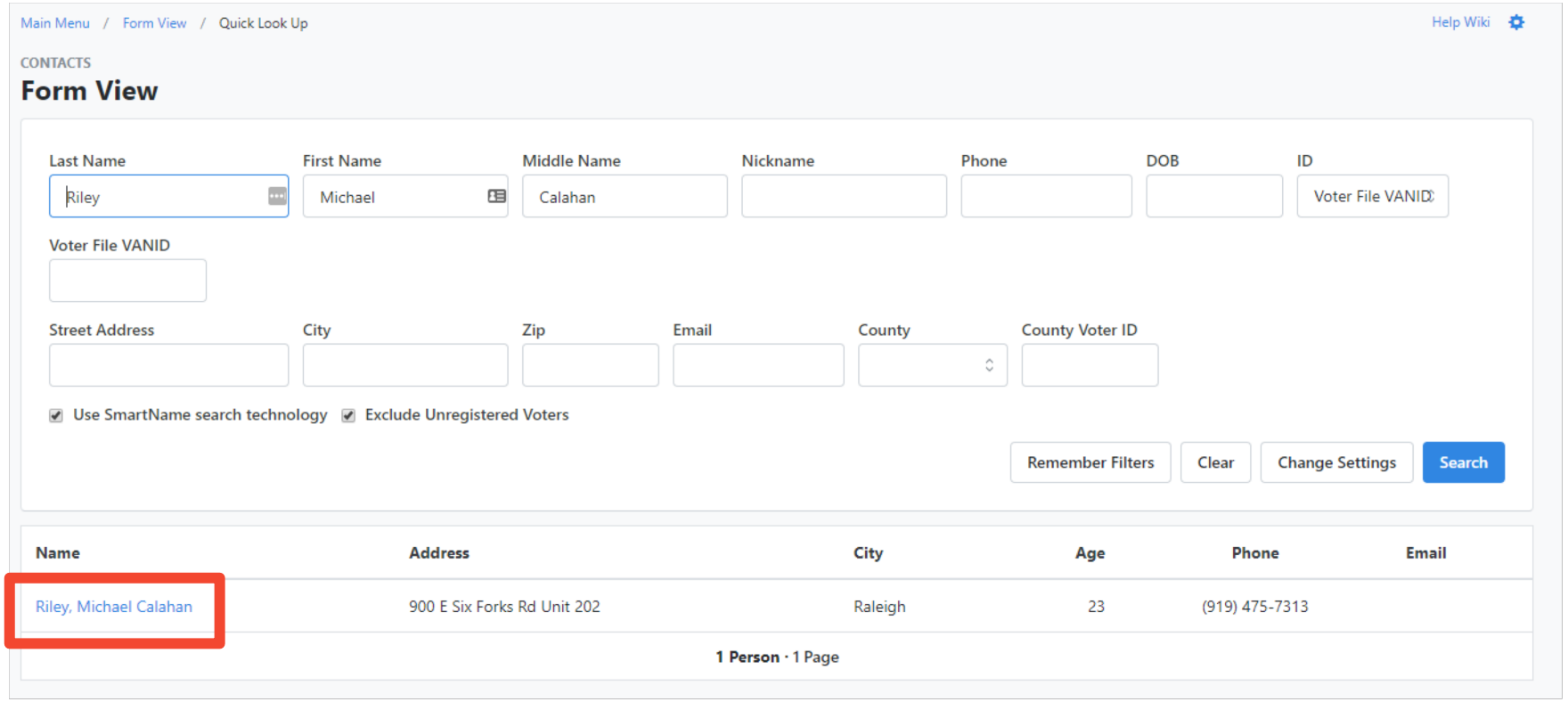
NCDEMOCRATS

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



NCDEMOCRATS

Select the name of the person once you have found them



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

District Attendance Activist Codes:	District Convention Activist Codes:
Meeting Delegate ☑ 2019 CD Delegate	☐ 19-21 1st CD VC ☐ 19-21 2nd CD VC ☐ 19-21 3rd CD VC ☐ 19-21 CD Chair ☐ 19-21 CD Min Affairs ☐ 19-21 CD Sec ☐ 19-21 CD Treasurer
District Attendee ☐ 2019 CD Attend	

Note: “2019 CD Delegate” should already be checked, since attendees of the Convention should all be CD Delegates (marked after the county convention).