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Last Updated: 2016-10-06

Overview

This article walks through the steps to create a **mobile canvassing list**, **setup users** with security access to be ‘canvassers’ on their smart phones, **create the canvassing questions** to ask, and how to **analyze the data** within the database as voters are canvassed. *If you prefer paper walk lists, or maybe you have a need for both, [this article](#) shows how to complete this task in that fashion.*

Note: **Trail Blazer** developer Patrick Hanf created the mobile canvassing app in 2012; he coded using the “html flow” technique allowing you to access the app on any mobile device, and post the data collected back to the your database. *It does require you have a steady internet/cell connection to use the app.*

 **Tip:** Use the **Ctrl+F** hot key to jump to different sections of this article (example: “**#1**”, “**#2**” or “**Related Resources**”).

Outline

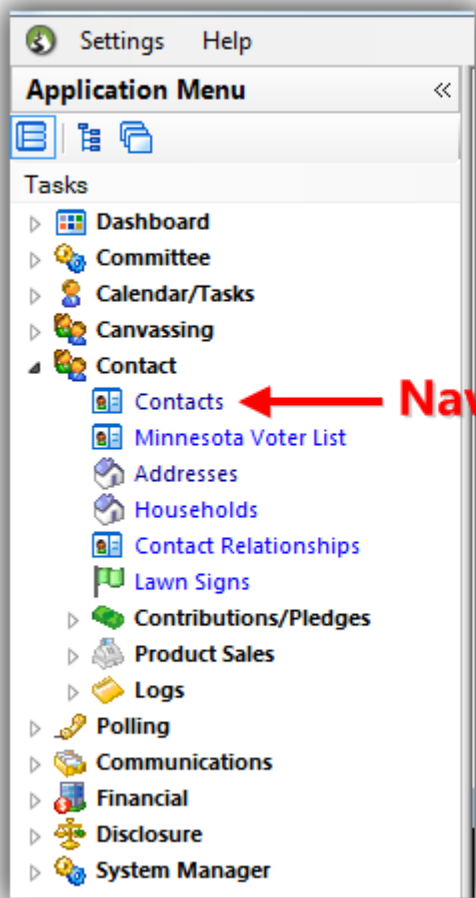
- #1 – How to Create your Canvassing Script (Questions) in the Database
- #2 – How to Create Users with Access to Mobile Base Camp (Canvassing on their Phone)
- #3 – Constructing a Search Query to Target Voters for your Canvassing List, Selecting which Script to Use, and Assigning the List to Users
- #4 – Running the Canvassing ‘App’ On your Mobile Device
- #5 – Searching and Analyzing the Canvassing Results in your Database
- #6 – Related Resources

#1 – How to Create your Canvassing Script (Questions) in the Database

You’ll create [attributes](#) as the canvassing questions. *Some ideas for questions are:*

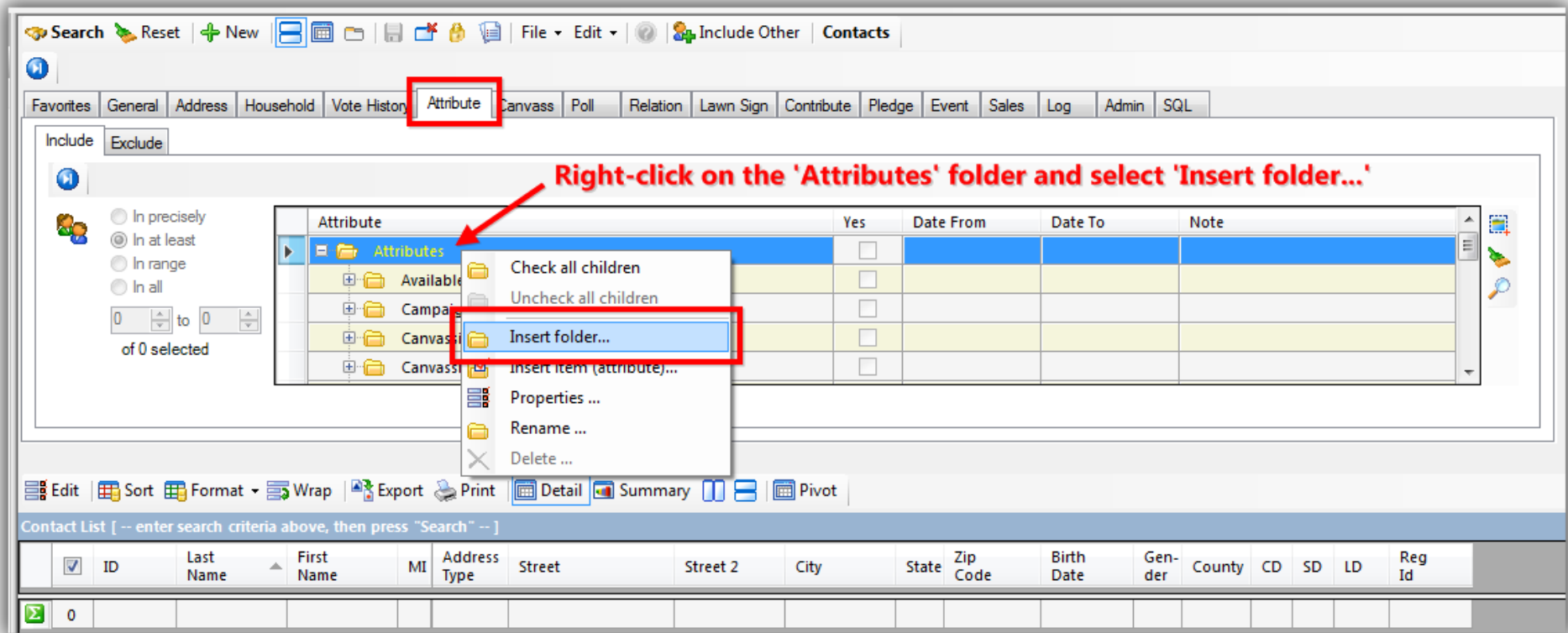
- *Do you support my candidate/Not support/Undecided?*
- *Do you want to volunteer?*
- *Do you want a yard sign?*
- *Voter not home*
- *Voter refused to answer*
- *List issues that you’re concerned with for this election season (war/economy/global warming/etc.)*

To begin adding your own attributes (questions) navigate to the **Contacts (Voters)** list under the **Application Menu**.

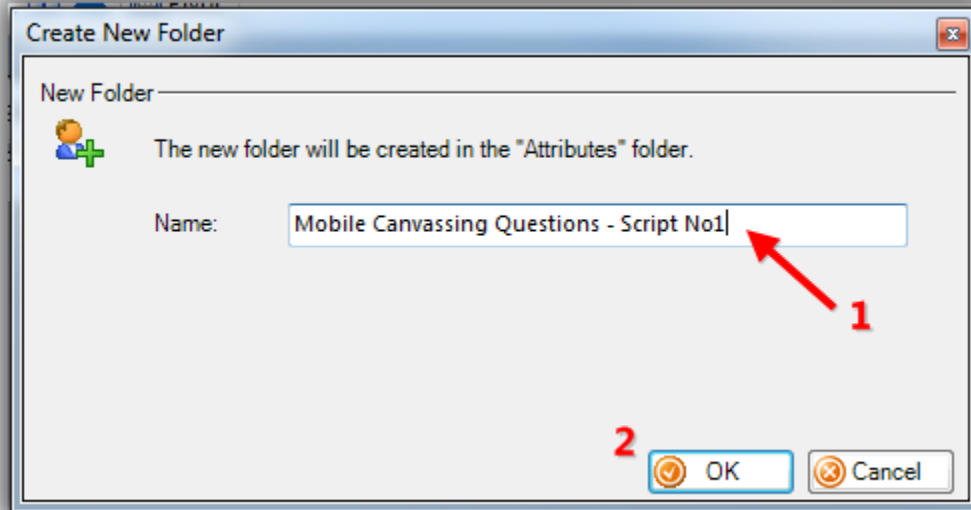


Navigate to the Contacts (Voters) list.

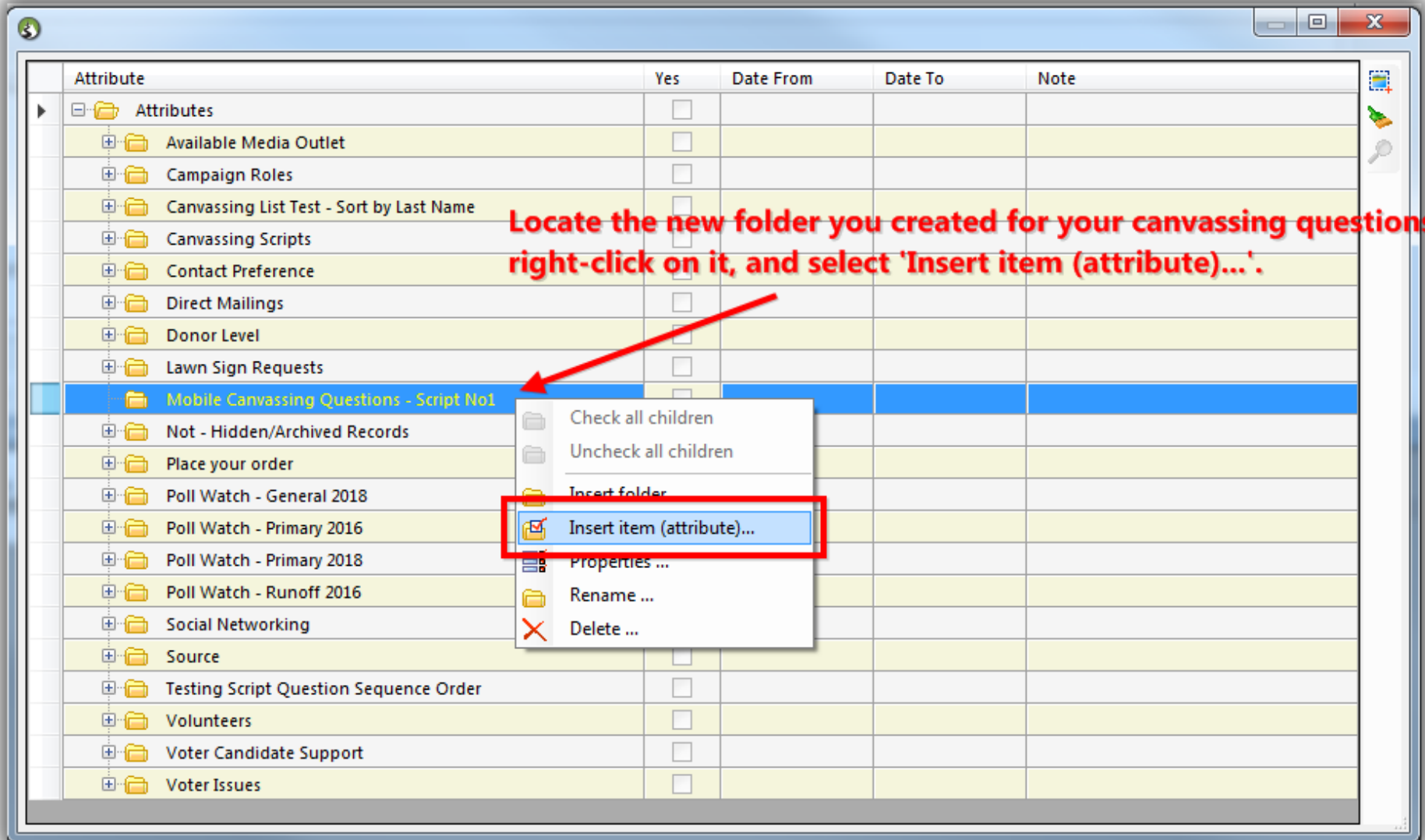
Navigate the **Attribute** tab, right-click on the **Attributes** folder and select 'Insert Folder'.



Create a **name** for your attribute folder (*canvassing script*) and click **[OK]**. In my example I called mine **“Mobile Canvassing Questions – Script No1”**.




Once the folder is created locate it in your attribute tree, right-click on it, and select **'Insert item (attribute)...'**.



Locate the new folder you created for your canvassing questions, right-click on it, and select 'Insert item (attribute)...'.

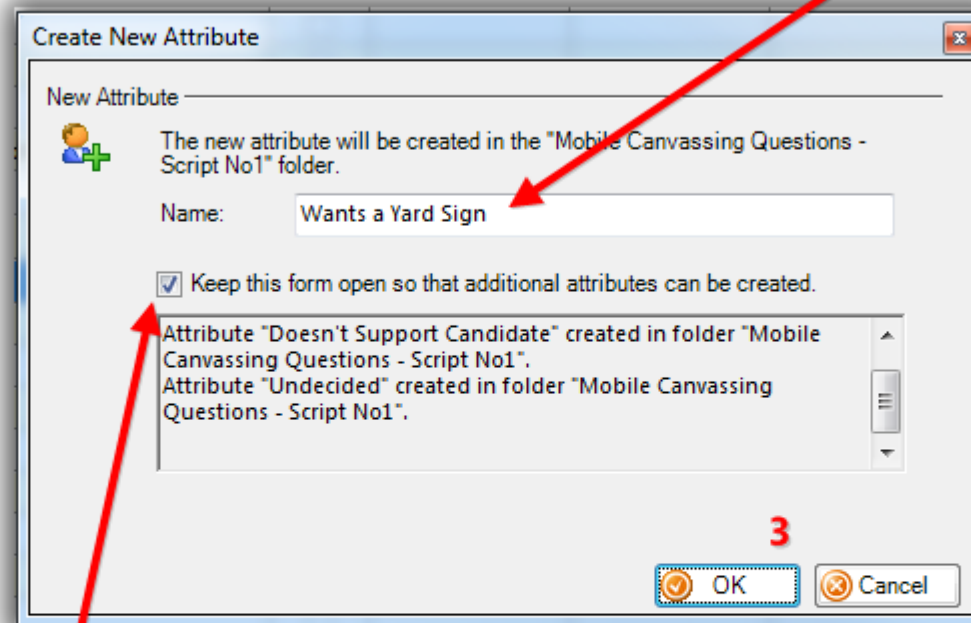
Attribute	Yes	Date From	Date To	Note
Attributes	<input type="checkbox"/>			
Available Media Outlet	<input type="checkbox"/>			
Campaign Roles	<input type="checkbox"/>			
Canvassing List Test - Sort by Last Name	<input type="checkbox"/>			
Canvassing Scripts	<input type="checkbox"/>			
Contact Preference	<input type="checkbox"/>			
Direct Mailings	<input type="checkbox"/>			
Donor Level	<input type="checkbox"/>			
Lawn Sign Requests	<input type="checkbox"/>			
Mobile Canvassing Questions - Script No1	<input type="checkbox"/>			
Not - Hidden/Archived Records	<input type="checkbox"/>			
Place your order	<input type="checkbox"/>			
Poll Watch - General 2018	<input type="checkbox"/>			
Poll Watch - Primary 2016	<input type="checkbox"/>			
Poll Watch - Primary 2018	<input type="checkbox"/>			
Poll Watch - Runoff 2016	<input type="checkbox"/>			
Social Networking	<input type="checkbox"/>			
Source	<input type="checkbox"/>			
Testing Script Question Sequence Order	<input type="checkbox"/>			
Volunteers	<input type="checkbox"/>			
Voter Candidate Support	<input type="checkbox"/>			
Voter Issues	<input type="checkbox"/>			

- Check all children
- Uncheck all children
- Insert folder
- Insert item (attribute)...**
- Properties ...
- Rename ...
- Delete ...

 **Tip:** You can have **as many sub-folders** in your main canvassing folder if you want to categorize the different types of questions you'll be asking. For instance you could have different lawn sign sizes in one folder, and another one that lists the issues people may be concerned with this for this election season.

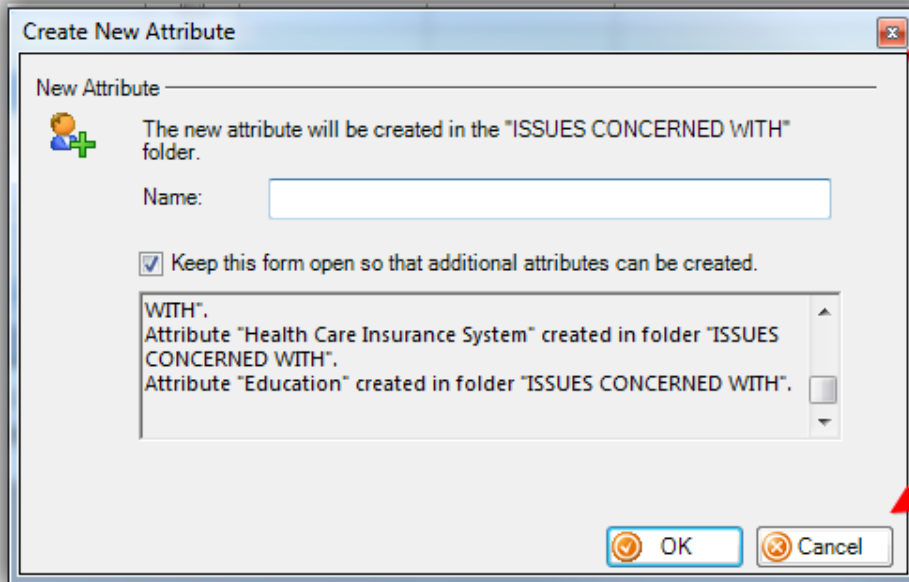
Create the different attribute items (questions) and click **[OK]** once you're finished. *You can check the box on the input form to keep it open if you'll be entering multiple items in one sitting. My example is below.*

1. Create names for your attribute items (canvassing questions).



2. Checking this box will make your life easier by keeping the form open so you can add multiple items in one sitting.

Once you've entered everything you'll actually click **[Cancel]** or the red **[x]** in the upper-right (if you're entering multiple attribute items at once). The image below provides details.



Once you've input the questions click either the red [x] in the upper-right to close the form, or [Cancel] in the bottom-right. (This is only necessary if you're entering multiple items at once).

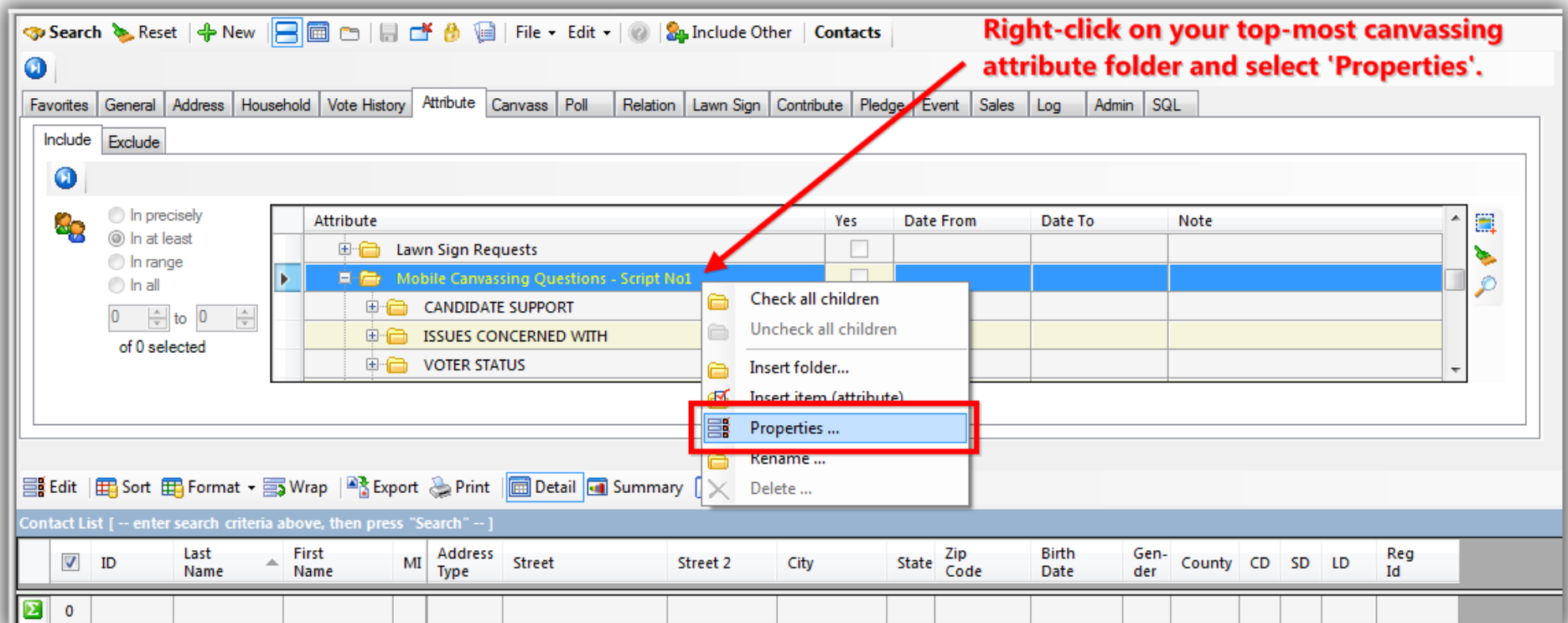
My finished example is below. You can always come back to this area in the future and make changes such as deleting, adding, renaming, and moving attributes within your new canvassing folder.

Attribute	Yes	Date From	Date To	Note
Attributes	<input type="checkbox"/>			
Available Media Outlet	<input type="checkbox"/>			
Campaign Roles	<input type="checkbox"/>			
Canvassing List Test - Sort by Last Name	<input type="checkbox"/>			
Canvassing Scripts	<input type="checkbox"/>			
Contact Preference	<input type="checkbox"/>			
Direct Mailings	<input type="checkbox"/>			
Donor Level	<input type="checkbox"/>			
Lawn Sign Requests	<input type="checkbox"/>			
Mobile Canvassing Questions - Script No1	<input type="checkbox"/>			
CANDIDATE SUPPORT	<input type="checkbox"/>			
Doesn't Support Candidate	<input type="checkbox"/>			
Supports Candidate	<input type="checkbox"/>			
Undecided	<input type="checkbox"/>			
ISSUES CONCERNED WITH	<input type="checkbox"/>			
Education	<input type="checkbox"/>			
Gay Marriage	<input type="checkbox"/>			
Health Care Insurance System	<input type="checkbox"/>			
Minimum Wage	<input type="checkbox"/>			
Nation Building	<input type="checkbox"/>			
Occupation Wars	<input type="checkbox"/>			
State of the Economy	<input type="checkbox"/>			
VOTER STATUS	<input type="checkbox"/>			
Canvassed	<input type="checkbox"/>			
Not Home	<input type="checkbox"/>			
Won't Talk (leave them alone)	<input type="checkbox"/>			
WANTS TO VOLUNTEER FOR	<input type="checkbox"/>			
Anything	<input type="checkbox"/>			
Phone Banking	<input type="checkbox"/>			
Turf Cutting (Canvassing)	<input type="checkbox"/>			
YARD SIGN REQUESTS	<input type="checkbox"/>			
BIG (4ft x 2ft)	<input type="checkbox"/>			
GIGANTIC (8ft x 4ft)	<input type="checkbox"/>			
MEDIUM (3ft x 1ft)	<input type="checkbox"/>			
SMALL (1ft x 1ft)	<input type="checkbox"/>			
Wants a Yard Sign (size doesn't matter)	<input type="checkbox"/>			
Not - Hidden/Archived Records	<input type="checkbox"/>			
Place your order	<input type="checkbox"/>			
Poll Watch - General 2018	<input type="checkbox"/>			
Poll Watch - Primary 2016	<input type="checkbox"/>			
Poll Watch - Primary 2018	<input type="checkbox"/>			
Poll Watch - Runoff 2016	<input type="checkbox"/>			
Social Networking	<input type="checkbox"/>			
Source	<input type="checkbox"/>			
Testing Script Question Sequence Order	<input type="checkbox"/>			

My finished canvassing folder.

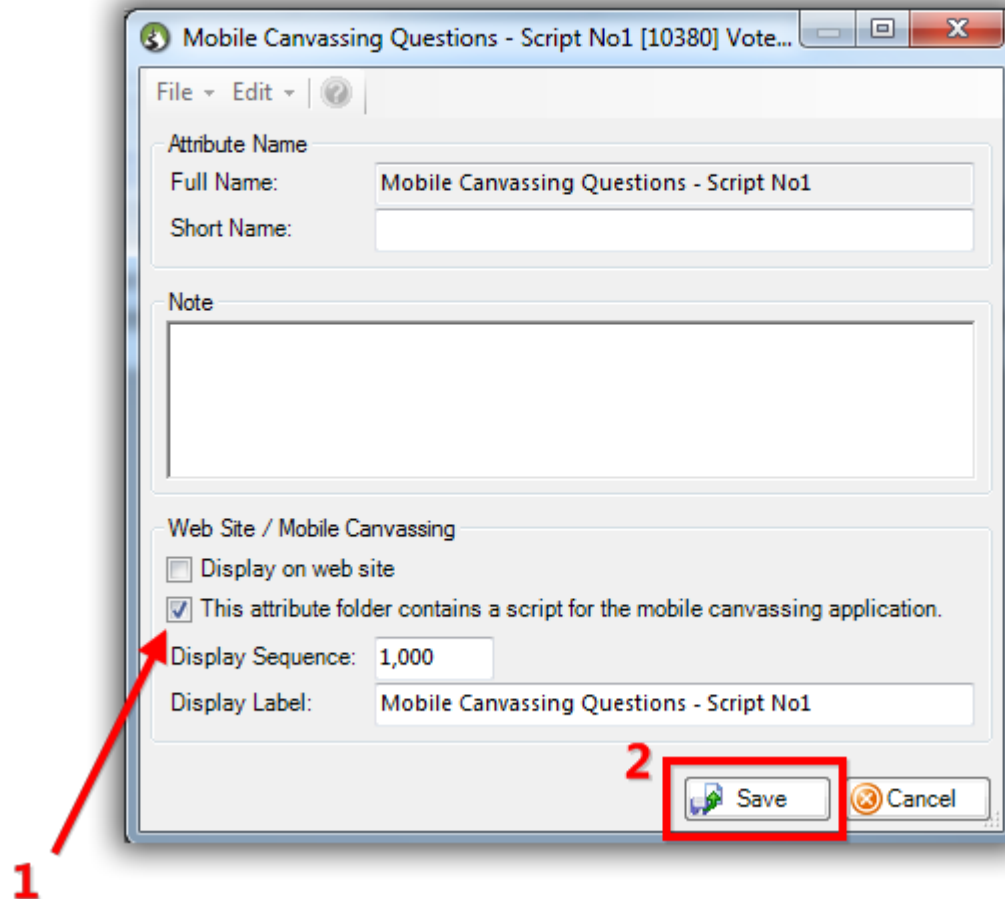
I separated my questions/requests into separate sub-folders to make it easier on the mobile door knockers.


Once you're finished creating the attribute folders/sub-folders/items, right-click on the top-most folder for your canvassing script and select 'Properties'.



Check the box that says 'This attribute folder contains a script for the mobile canvassing application', and click [Save].

Activating your attribute folder as a mobile canvassing script.



 **Tip:** If you want to change the **order** that your questions show up on the mobile canvassing app you right click-each attribute (question), select properties, check the box for '**Display on web site**' which will activate the '**Display Sequence**' field. *This can be very useful if you want the canvassers to ask questions in a certain sequence, here's an example:*

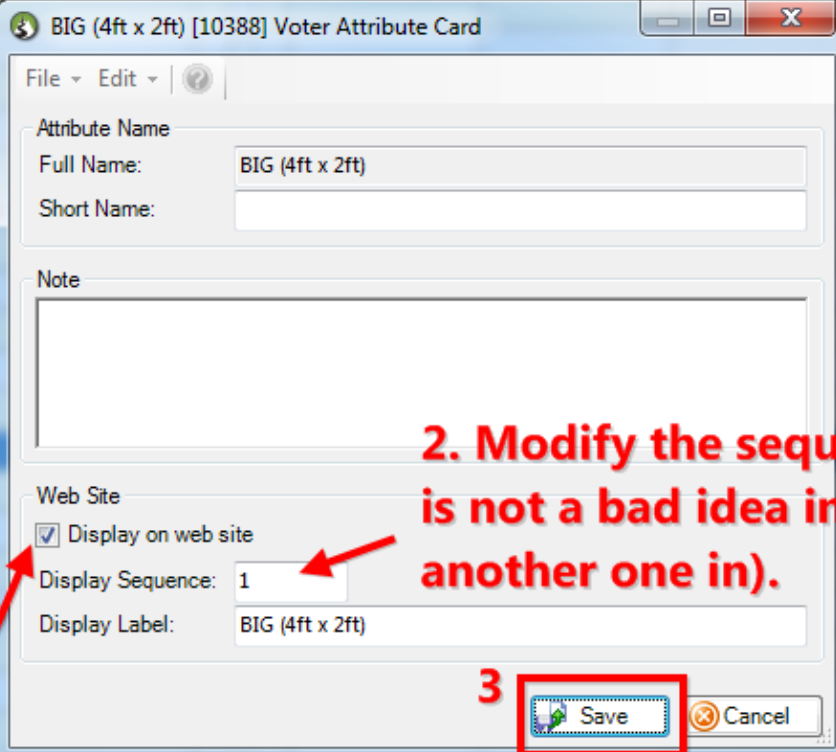
Img 1 of 2 – Right-click the Attribute Item (Question) and Select ‘Properties ...’.

You can change the 'sequence order' of each attribute (question) for how it will display on the mobile web app.

Start by right-clicking on the attribute item and select 'Properties ...'.

Attribute	Yes	Date From	Date To	Note
Attributes	<input type="checkbox"/>			
Available Media Outlet	<input type="checkbox"/>			
Campaign Roles	<input type="checkbox"/>			
Canvassing Scripts	<input type="checkbox"/>			
Contact Preference	<input type="checkbox"/>			
Direct Mailings	<input type="checkbox"/>			
Donor Level	<input type="checkbox"/>			
Lawn Sign Requests	<input type="checkbox"/>			
Mobile Canvassing Questions - Script No1	<input type="checkbox"/>			
CANDIDATE SUPPORT	<input type="checkbox"/>			
ISSUES CONCERNED WITH	<input type="checkbox"/>			
VOTER STATUS	<input type="checkbox"/>			
WANTS TO VOLUNTEER FOR	<input type="checkbox"/>			
YARD SIGN REQUESTS	<input type="checkbox"/>			
BIG (4ft x 2ft)	<input type="checkbox"/>			
GIGANTIC (8ft x 4ft)	<input type="checkbox"/>			
MEDIUM (3ft x 1ft)	<input type="checkbox"/>			
SMALL (1ft x 1ft)	<input type="checkbox"/>			
Wants a Yard Sign (size doesn't matter)	<input type="checkbox"/>			
Not - Hidden/Archived Records	<input type="checkbox"/>			
Place your order	<input type="checkbox"/>			
Poll Watch - General 2018	<input type="checkbox"/>			
Poll Watch - Primary 2016	<input type="checkbox"/>			

Img 2 of 2 – Check the Box to ‘Display on web site’ and Provide a Sequence ID



BIG (4ft x 2ft) [10388] Voter Attribute Card

File Edit

Attribute Name

Full Name: BIG (4ft x 2ft)

Short Name:

Note

Web Site

Display on web site

Display Sequence: 1

Display Label: BIG (4ft x 2ft)

Save Cancel

2. Modify the sequence ID (using increments of 10 is not a bad idea incase you ever need to squeeze another one in).

3

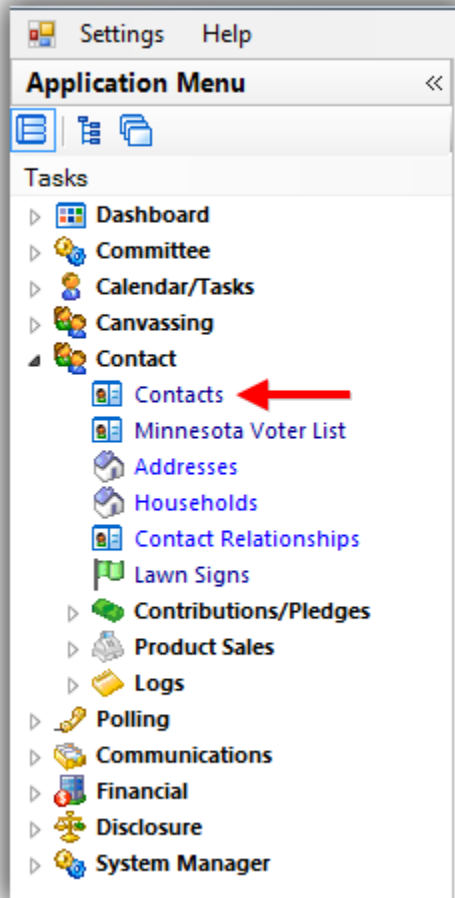
1. Check this box to activate the 'Display Sequence' field if, you want to change the order that your canvassing questions show up on the mobile web app.

You're now finished creating the canvassing script, the next section shows how to create users with access to the mobile canvassing site.

Important: As of the time this article was written you'll **need** to **close out** of the Contacts (*Voters*) list, and **reopen** it, before you can use your new canvassing folder as a script (*otherwise it won't display in your script drop-down in the upcoming steps*).

#2 – How to Create Users with Access to Mobile Base Camp (Canvassing on their Phone)

Navigate to the Contacts (*Voters*) list.



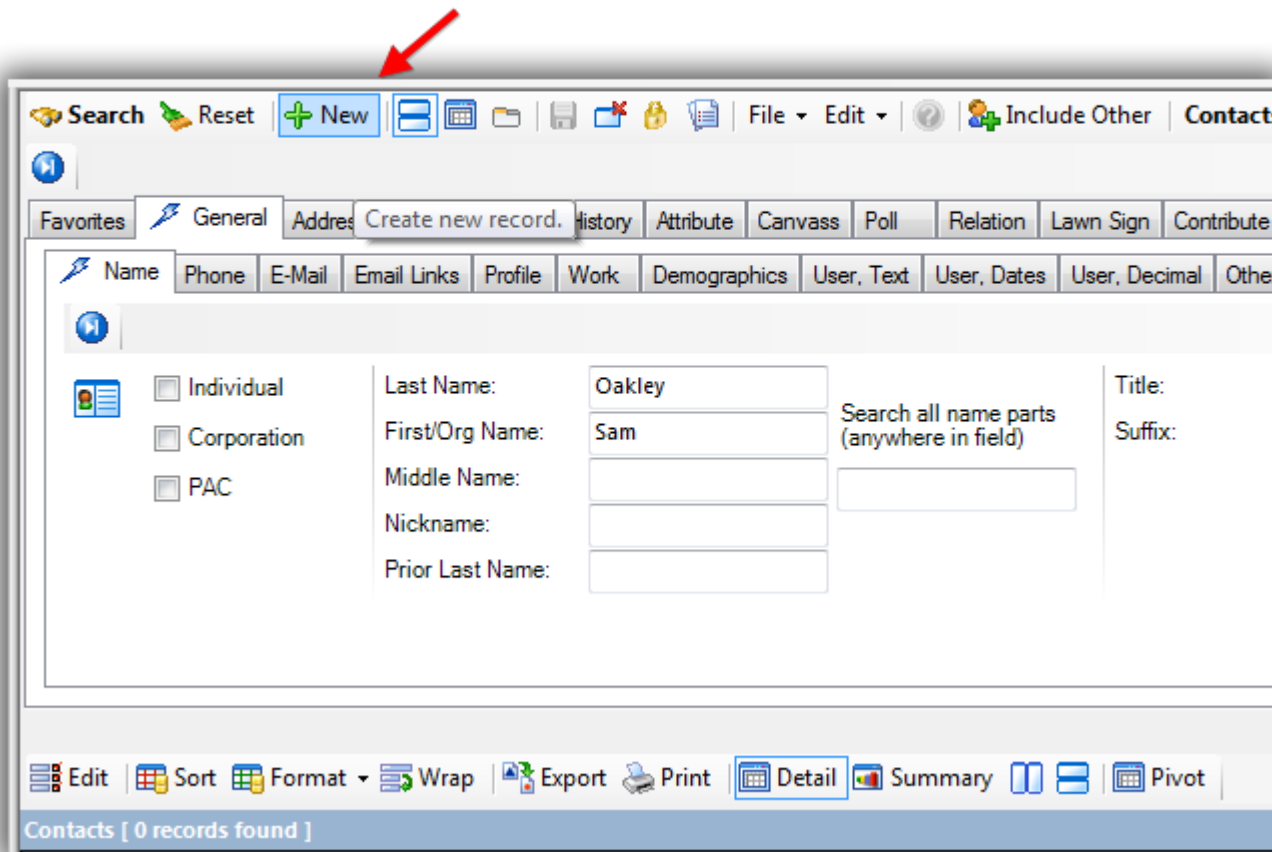
Search for the contact you want to setup as a mobile canvasser, typically by Last Name and First Name. *If they aren't in your database you'll need to add them as a new user. In my example I searched for someone named Sam Oakley who at the time was not in my database.*

The screenshot shows the TrailBlazer software interface. On the left is a navigation tree with categories like Tasks, Dashboard, Committee, Calendar/Tasks, Canvassing, Contact, Contributions/Pledges, Product Sales, Logs, Polling, Communications, Financial, Disclosure, and System Manager. The 'Contact' sub-category is expanded. The main window displays a 'Search' tool strip with buttons for Search, Reset, and New. Below this is a form for creating a contact, with a red box around the 'Search' button and a red arrow pointing to the 'Contacts [0 records found]' status bar. The form includes fields for Name (Last Name: Oakley, First/Org Name: Sam), Title, Middle Name, Nickname, Prior Last Name, and Suffix. A red text overlay reads '1. Enter the contact's name.' Below the form is a table with columns: ID, Last Name, First Name, MI, Address Type, Street, Street 2, City, State, Zip Code, Birth Date, Gender, County, CD, SD, LD, and Reg Id. The table shows one row with the value '0' in the ID column.

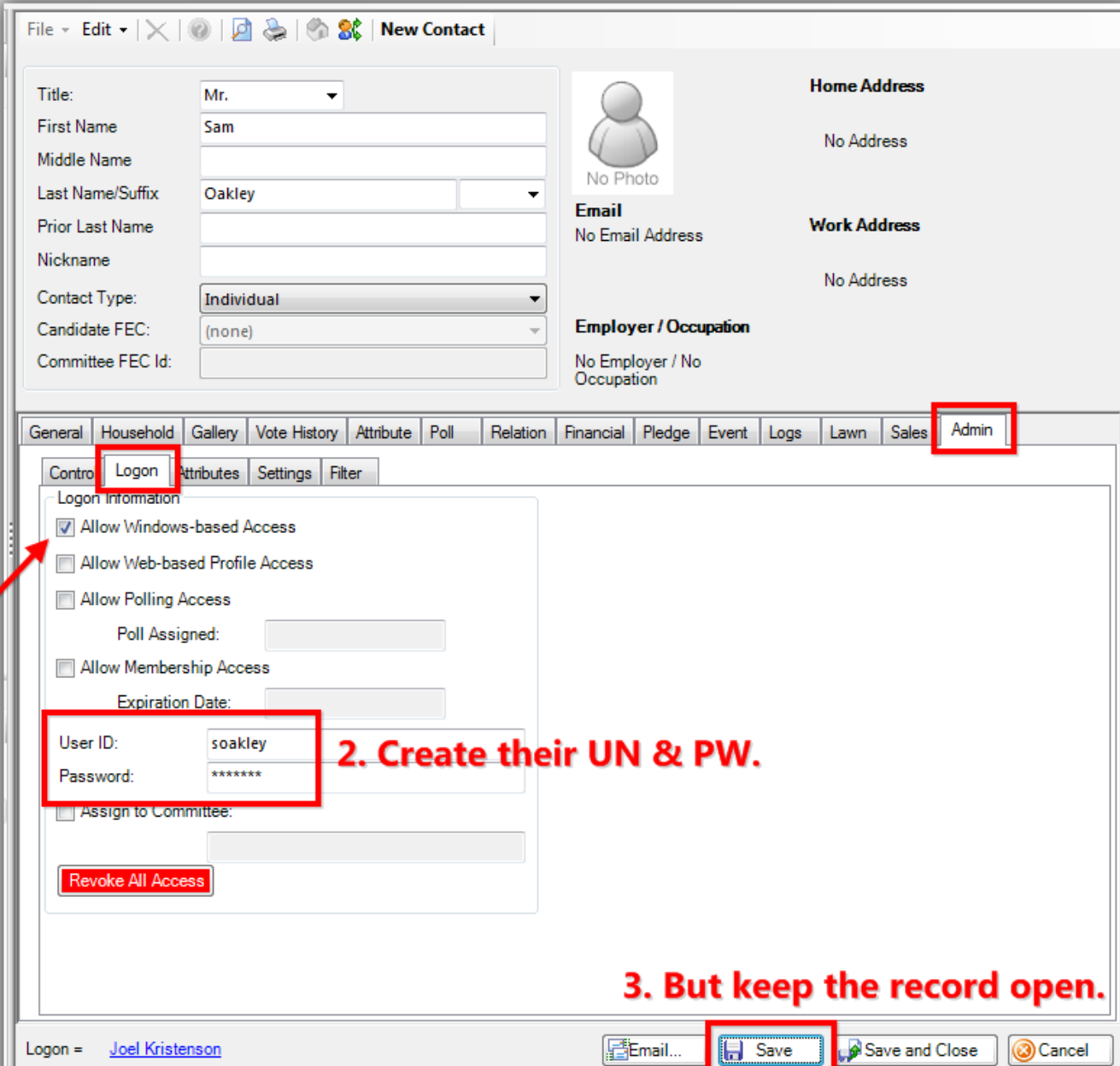
Results - if the contact is in your database click on their name to open the record, if not you'll need to add them in as a new record.

If the contact is in your database click on their name to open their record, otherwise click the [+ New] button on the search tool strip. In my example I needed to add them in as a new contact record.

If the contact isn't in your database click the [+ New] button on the search tool strip.



Once the record card is open navigate to the **Admin > Logon** area, check the box for '**Allow Windows-based Access**', create a **User ID & Password**, and then click **[Save]**.



File ▾ **Edit** ▾ | [Icons] | **New Contact**

Title: Mr. ▾
First Name: Sam
Middle Name:
Last Name/Suffix: Oakley ▾
Prior Last Name:
Nickname:
Contact Type: Individual ▾
Candidate FEC: (none) ▾
Committee FEC Id:
Home Address: No Address
Work Address: No Address
Email: No Email Address
Employer / Occupation: No Employer / No Occupation

General | **Household** | **Gallery** | **Vote History** | **Attribute** | **Poll** | **Relation** | **Financial** | **Pledge** | **Event** | **Logs** | **Lawn** | **Sales** | **Admin**

Control | **Logon** | **Attributes** | **Settings** | **Filter**

Logon Information

Allow Windows-based Access
 Allow Web-based Profile Access
 Allow Polling Access
Poll Assigned:
 Allow Membership Access
Expiration Date:
User ID: soakley
Password: *****
 Assign to Committee:
Revoke All Access

Logon = [Joel Kristenson](#) | **Email...** | **Save** | **Save and Close** | **Cancel**

1. Check the box for 'Allow Windows-based Access.'

2. Create their UN & PW.

3. But keep the record open.

Navigate to the **Attributes (sub-tab)**, expand the **Security** attribute tree, and check all the boxes under the **Voter** folders **'Activities'** and **'Data'**. *My example is below.*

File Edit | New Contact

Title: Mr. | First Name: Sam | Middle Name: | Last Name/Suffix: Oakley | Prior Last Name: | Nickname: | Contact Type: Individual | Candidate FEC: (none) | Committee FEC Id: | Home Address: No Address | Work Address: No Address | Email: No Email Address | Employer / Occupation: No Employer / No Occupation

General Household Gallery Vote History Attribute Poll Relation Financial Pledge Event Logs Lawn Sales Admin

Control Logon **Attributes** Settings Filter

Attribute	Yes	Date	Note
Notification by Email	<input type="checkbox"/>		
Security	<input checked="" type="checkbox"/>		
Applications	<input checked="" type="checkbox"/>		
Calendar	<input type="checkbox"/>		
Email	<input type="checkbox"/>		
Financial	<input type="checkbox"/>		
Polling	<input type="checkbox"/>		
Security Management	<input type="checkbox"/>		
Text	<input type="checkbox"/>		
Voter	<input checked="" type="checkbox"/>		
Activities	<input type="checkbox"/>		
Allow Add/Edit of Attributes	<input checked="" type="checkbox"/>	8/26/2016	
Allow Updating of Log Dates	<input checked="" type="checkbox"/>	8/26/2016	
Contribution	<input type="checkbox"/>		
Data	<input type="checkbox"/>		
Allow Read Access	<input type="checkbox"/>		
Allow Write Access	<input type="checkbox"/>		
Data	<input type="checkbox"/>		
Allow Read Access	<input checked="" type="checkbox"/>	8/26/2016	
Allow Write Access	<input checked="" type="checkbox"/>	8/26/2016	
Global	<input type="checkbox"/>		
Start Page	<input type="checkbox"/>		

Logon = Joel Kristenson | Email... | Save | Save and Close | Cancel

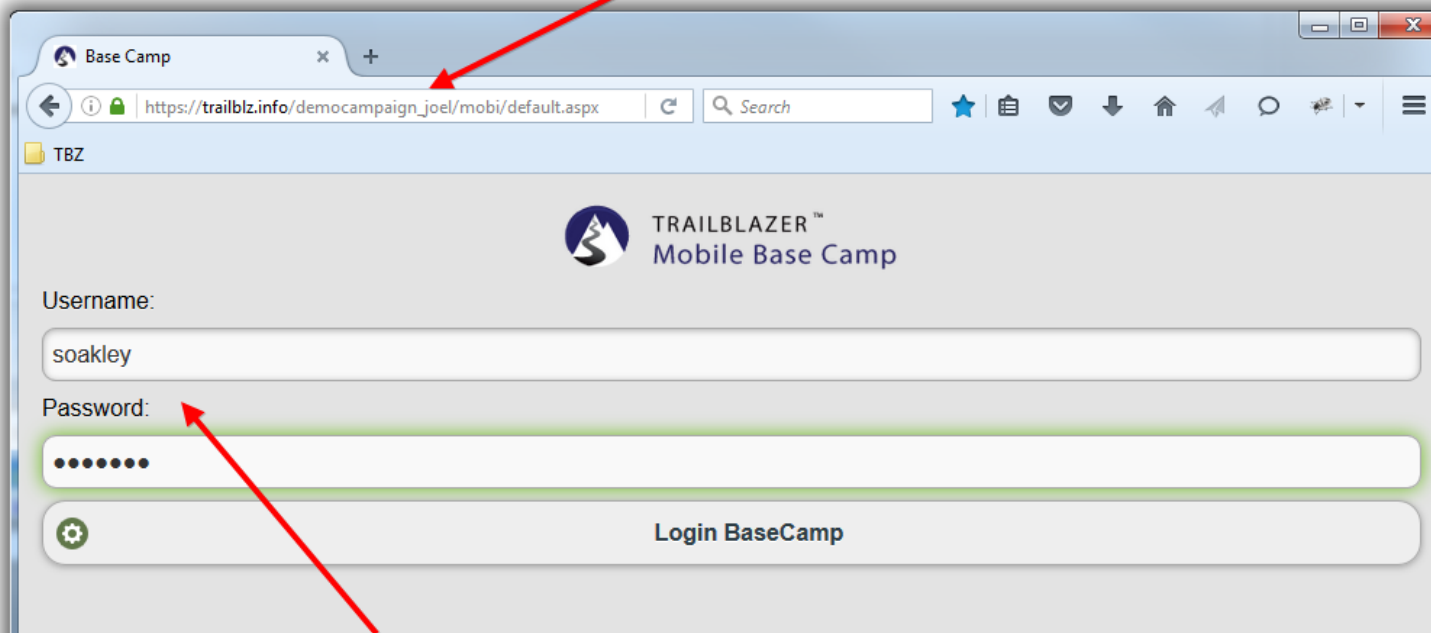
2

1

3

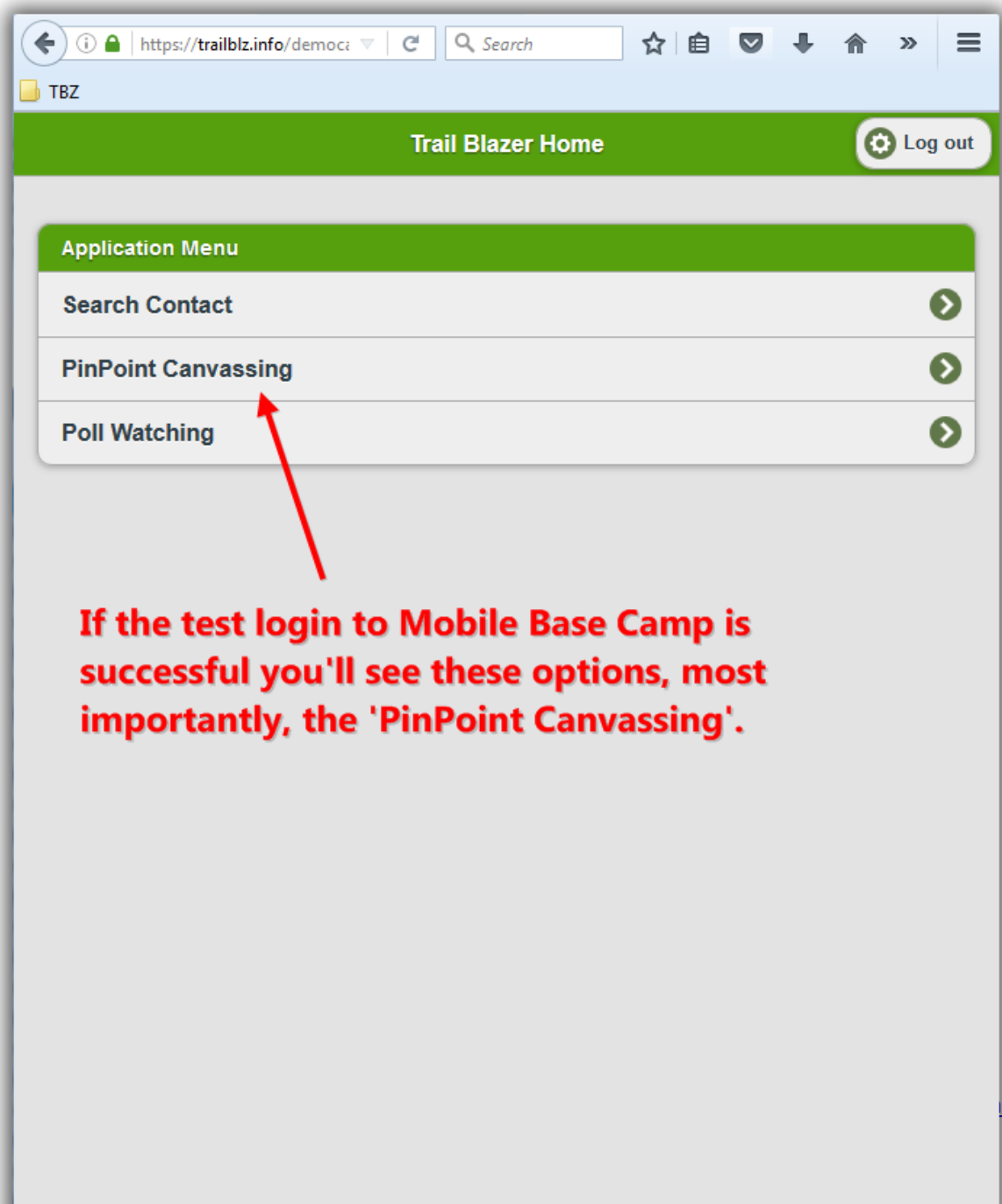
[Save and Close] their record and you're finished. You or the new user can test logging it on the Mobile Base Camp web app site (www.trailblz.info/YourDatabaseNameGoesHere/mobi). *In my example it the site was [www.trailblz.info/DemoCampaign Joel/mobi](http://www.trailblz.info/DemoCampaign_Joel/mobi).*

You'll log into the Mobile Base Camp web app at www.trailblz.info/YourDatabaseName/mobi (make sure to replace 'YourDatabaseName' with your organization's unique Database Name).




Tip: Have your canvassers test log in on their mobile devices to make sure they are configured correctly for access and that the web app functions on their mobile device(s).

This is what it should look like if the login is successful:



If the test login to Mobile Base Camp is successful you'll see these options, most importantly, the 'PinPoint Canvassing'.

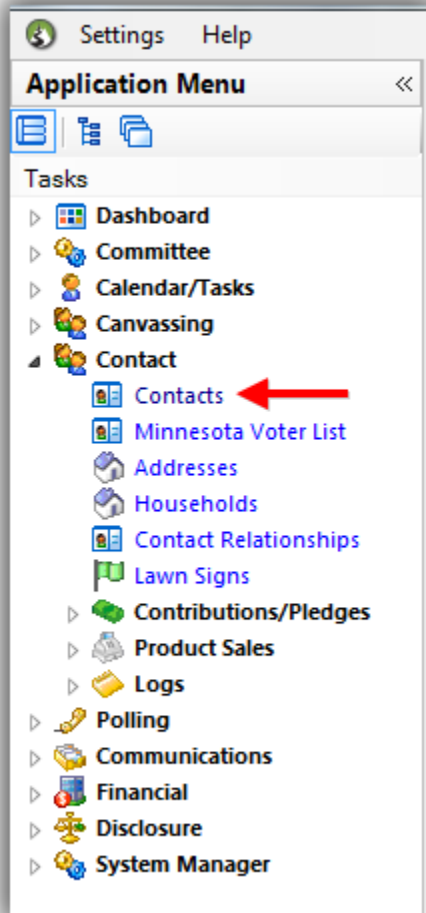
You'll return to this area in a later section of this article when you're ready to actually run the mobile walk list. The next section shows how to target a list of voters to canvass, select the canvassing script to use, and how to assign it to your user(s).

 **Tip:** [This article](#) will show you some very useful tips and tricks on how to effectively use Mobile Base Camp on your different devices. Specifically, how to **keep the screen on longer**, and **how to add shortcuts** to your **home screen** for quick launching of the web app.

#3 – Constructing a Search Query to Target Voters for your Canvassing List, Selecting the Script, and Assigning the List to Users

First you'll need to decide with your campaign team what type of voters (*gender/age/party/ethnicity/etc.*) you want to target as well as where they live (*district/precinct/ward/county/city/zip/etc.*).

Navigate to the Contacts (*Voters*) list.



Build and run your [search query](#). In my example I went after all voters who lived in a particular (small) precinct, who voted in the last general election which gave me 16 results. It's not a bad idea at all to [save the search as a favorite query](#) for future use (covered in section #5) so that you don't need to rebuild it when you're analyzing the canvassing results.

Search Reset New [Icons] File Edit Include Other Contacts

Favorites General Address Household Vote History Attribute Canvass Poll Relation Lawn Sign Contribute Pledge Event Sales Log Admin SQL

Address Types

- Default Display
- Mailing
- Main Home
- Main Work
- Other Home
- Other Work
- Registration
- Current Addresses

Address Additional District User Types

CD: [Dropdown] Precinct Name: GOLDEN VALL [Dropdown]
 SD: [Dropdown] Precinct Code: [Dropdown]
 LD: [Dropdown] Comm / Police Jurv: [Dropdown]
 Ward: [Dropdown] City Council: [Dropdown]
 School: [Dropdown]

Enter your search criteria in the different tabs for things like (vote history/party/location/age/etc.) and then click [Search] to populate the list of voters.

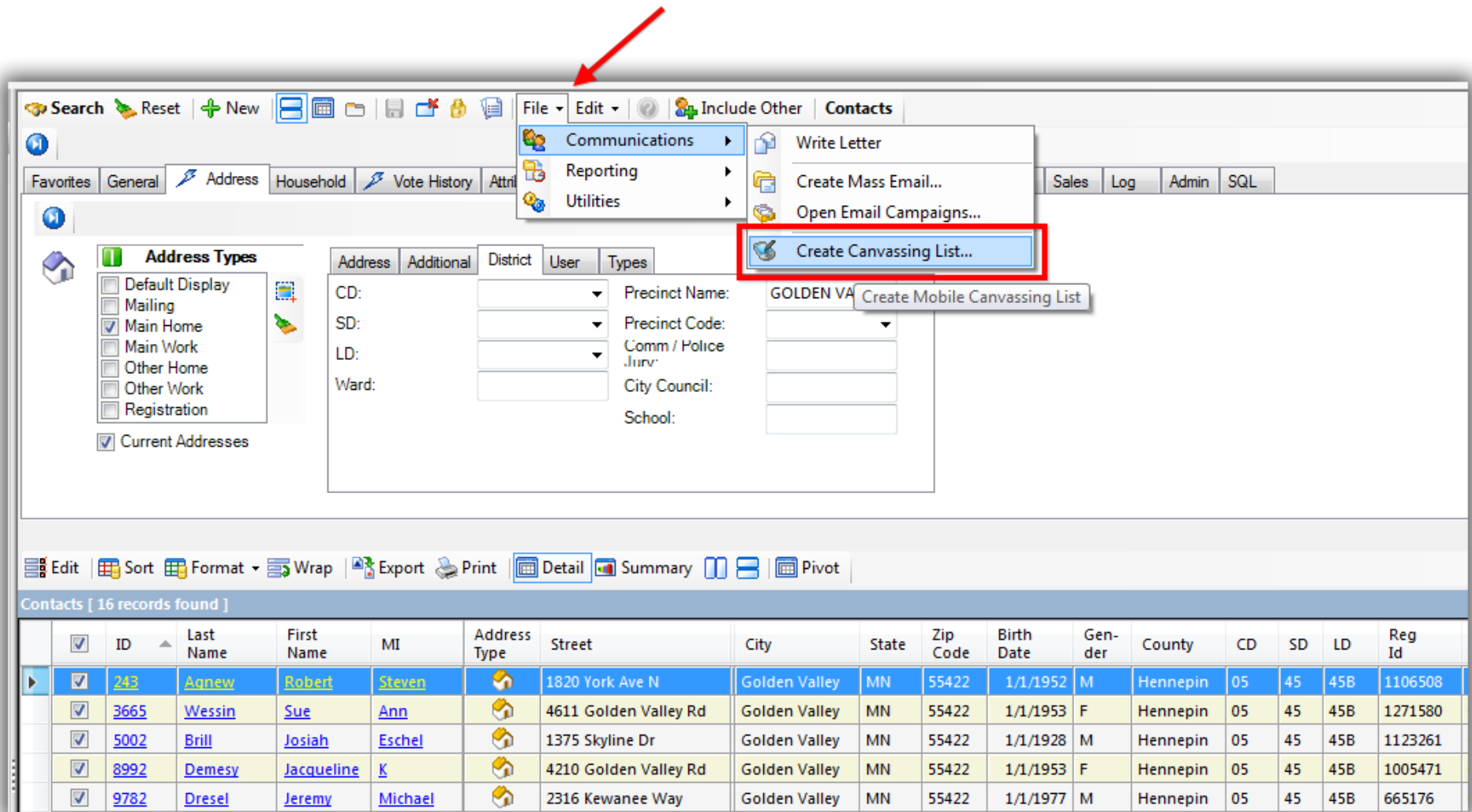
Edit Sort Format Wrap Export Print Detail Summary Pivot

Contacts [16 records found]

ID	Last Name	First Name	MI	Address Type	Street	City	State	Zip Code	Birth Date	Gender	County	CD	SD	LD	Reg Id	Precinct Code	Precinct Name	Age	Party
243	Adnew	Robert	Steven	[Home]	1820 York Ave N	Golden Valley	MN	55422	1/1/1952	M	Hennepin	05	45	45B	1106508	0985	GOLDEN VALLEY P-01	65	DEM
3665	Wessin	Sue	Ann	[Home]	4611 Golden Valley Rd	Golden Valley	MN	55422	1/1/1953	F	Hennepin	05	45	45B	1271580	0985	GOLDEN VALLEY P-01	64	IND
5002	Brill	Josiah	Eschel	[Home]	1375 Skyline Dr	Golden Valley	MN	55422	1/1/1928	M	Hennepin	05	45	45B	1123261	0985	GOLDEN VALLEY P-01	89	DEM
8992	Demesy	Jacqueline	K	[Home]	4210 Golden Valley Rd	Golden Valley	MN	55422	1/1/1953	F	Hennepin	05	45	45B	1005471	0985	GOLDEN VALLEY P-01	64	IND
9782	Dresef	Jeremy	Michael	[Home]	2316 Kewanee Way	Golden Valley	MN	55422	1/1/1977	M	Hennepin	05	45	45B	665176	0985	GOLDEN VALLEY P-01	40	REP
11653	Ferrell	Marie	Elena	[Home]	4315 Golden Valley Rd	Golden Valley	MN	55422	1/1/1947	F	Hennepin	05	45	45B	995887	0985	GOLDEN VALLEY P-01	70	DEM
21569	Kirberger	Robert	Charles	[Home]	2937 Kyle Ave N	Golden Valley	MN	55422	1/1/1929	M	Hennepin	05	45	45B	989873	0985	GOLDEN VALLEY P-01	88	REP
29301	Murray	Eranious	Mcneil	[Home]	1719 Xerxes Ave N	Golden Valley	MN	55411	1/1/1938		Hennepin	05	45	45B	1236386	0985	GOLDEN VALLEY P-01	79	REP
29312	Murray	Mikki	Mokihana	[Home]	1719 Xerxes Ave N	Golden Valley	MN	55411	1/1/1965	F	Hennepin	05	45	45B	1075190	0985	GOLDEN VALLEY P-01	52	REP
34644	Reiling	Cristine	Marie	[Home]	3320 Lee Ave N	Golden Valley	MN	55422	1/1/1969	F	Hennepin	05	45	45B	2271251	0985	GOLDEN VALLEY P-01	48	DEM
35044	Richter	John	Twiss	[Home]	1915 Kyle Pl	Golden Valley	MN	55422	1/1/1923	M	Hennepin	05	45	45B	1075359	0985	GOLDEN VALLEY P-01	94	DEM
36904	Scarrow	Steven	Donald	[Home]	3109 Golden Valley Rd	Golden Valley	MN	55422	1/1/1970	M	Hennepin	05	45	45B	1411394	0985	GOLDEN VALLEY P-01	47	DEM
37599	Schuldt	Bette	Jean	[Home]	2130 Mary Hills Dr	Golden Valley	MN	55422	1/1/1928	F	Hennepin	05	45	45B	989928	0985	GOLDEN VALLEY P-01	89	REP
39260	Smith	Larry	Max	[Home]	2080 Mary Hills Dr	Golden Valley	MN	55422	1/1/1934	M	Hennepin	05	45	45B	990910	0985	GOLDEN VALLEY P-01	83	REP
44764	Wennblom	James		[Home]	3125 Vista Dr	Golden Valley	MN	55422	1/1/1931	M	Hennepin	05	45	45B	989958	0985	GOLDEN VALLEY P-01	86	DEM
44836	Wessin	George	Stanley	[Home]	4611 Golden Valley Rd	Golden Valley	MN	55422	1/1/1953	M	Hennepin	05	45	45B	954877	0985	GOLDEN VALLEY P-01	64	DEM
16																		1122	

Results (arrow pointing to table header)

Select **File > Communications > Create Canvassing List ...**



The screenshot shows the TrailBlazer software interface. A red arrow points to the 'File' menu, which is open. The 'Create Canvassing List...' option is highlighted with a red box. Below the menu is a form for creating a mobile canvassing list. The form has the following fields:

- Address: CD, SD, LD, Ward
- Additional: District, User, Types
- Precinct Name: GOLDEN VA
- Precinct Code: [Dropdown]
- Comm / Police Jurv: [Text]
- City Council: [Text]
- School: [Text]

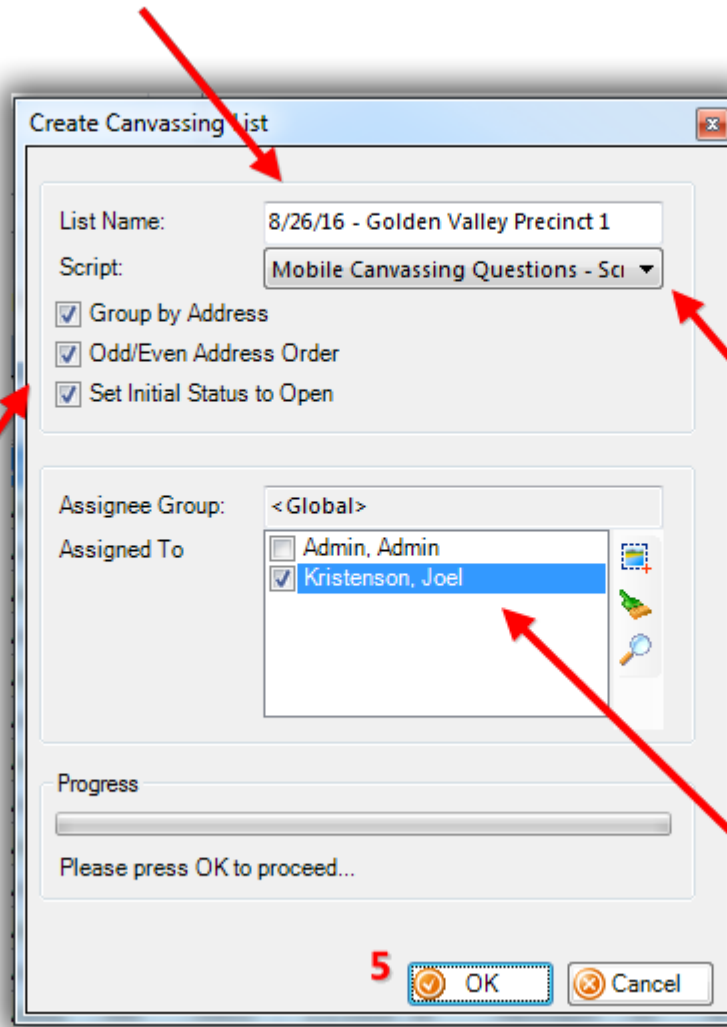
Below the form is a table of contacts. The table has the following columns: ID, Last Name, First Name, MI, Address Type, Street, City, State, Zip Code, Birth Date, Gender, County, CD, SD, LD, Reg Id.

ID	Last Name	First Name	MI	Address Type	Street	City	State	Zip Code	Birth Date	Gender	County	CD	SD	LD	Reg Id
243	Agnew	Robert	Steven	[Icon]	1820 York Ave N	Golden Valley	MN	55422	1/1/1952	M	Hennepin	05	45	45B	1106508
3665	Wessin	Sue	Ann	[Icon]	4611 Golden Valley Rd	Golden Valley	MN	55422	1/1/1953	F	Hennepin	05	45	45B	1271580
5002	Brill	Josiah	Eschel	[Icon]	1375 Skyline Dr	Golden Valley	MN	55422	1/1/1928	M	Hennepin	05	45	45B	1123261
8992	Demesy	Jacqueline	K	[Icon]	4210 Golden Valley Rd	Golden Valley	MN	55422	1/1/1953	F	Hennepin	05	45	45B	1005471
9782	Dresel	Jeremy	Michael	[Icon]	2316 Kewanee Way	Golden Valley	MN	55422	1/1/1977	M	Hennepin	05	45	45B	665176

Create a **name** for the canvassing list, choose who to assign it to, select your script from the drop-down (*created in section #1*), as well as any other options you want to configure. Typically you will set the status to 'Open' unless you plan on 'opening' up the canvassing list at a future point.

Once you're finished click [OK]. My example is below for my canvassing list called "8/26/16 – Golden Valley Precinct 1".

1. Create a name for the canvassing list.



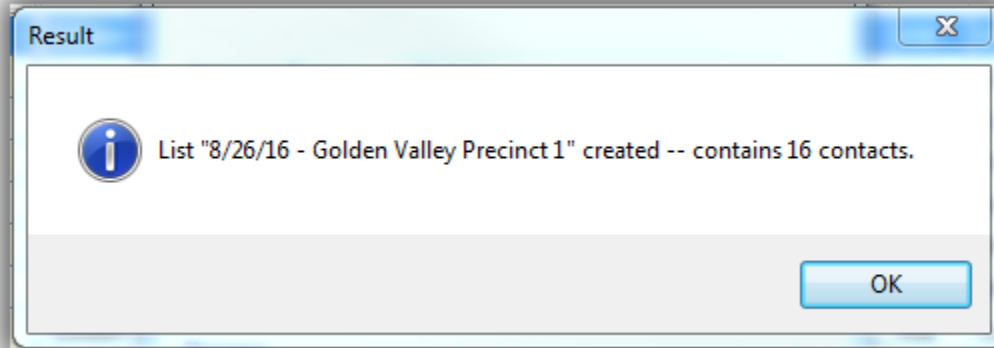
3. Select your options.

The 'status' must be set to 'open' for the canvassing list to appear on the web app for your door-knockers.

2. Select the 'Script' you created in the previous steps.

4. Select the user(s) to assign the list to.

You'll get a popup message once the process is complete. Click **[OK]**.



That completes the steps to create and assign a canvassing list to your door-knockers. **If* you have access, you can now go view the canvassing lists you've created by following **Application Menu > Canvassing > Canvassing Lists** and clicking **[Search]**.

If you have access you can view the canvassing lists in your database, along with the results as they come in, by searching in the Canvassing list.

The screenshot shows the TrailBlazer software interface. The 'Canvassing Lists' section is active, displaying a search bar and a table of records. A red box highlights the search bar, and a red arrow points to the 'Canvassing Lists' menu item. The table below shows one record with ID 16, description '8/26/16 - Golden Valley Precinct 1', and status 'Open'.

ID	Description	Status	Date Created	Date Opened	Date Closed	Canvassed Contact Count	Contact Count	Canvassed Address Count	Address Count	Assignment Count	Assigned To ID	Assigned To	Script Name
16	8/26/16 - Golden Valley Precinct 1	Open	8/26/2016			0	16	0	14	1	131258	Kristenson, Joel Anders	Mobile Canvassing Questions - Script No1

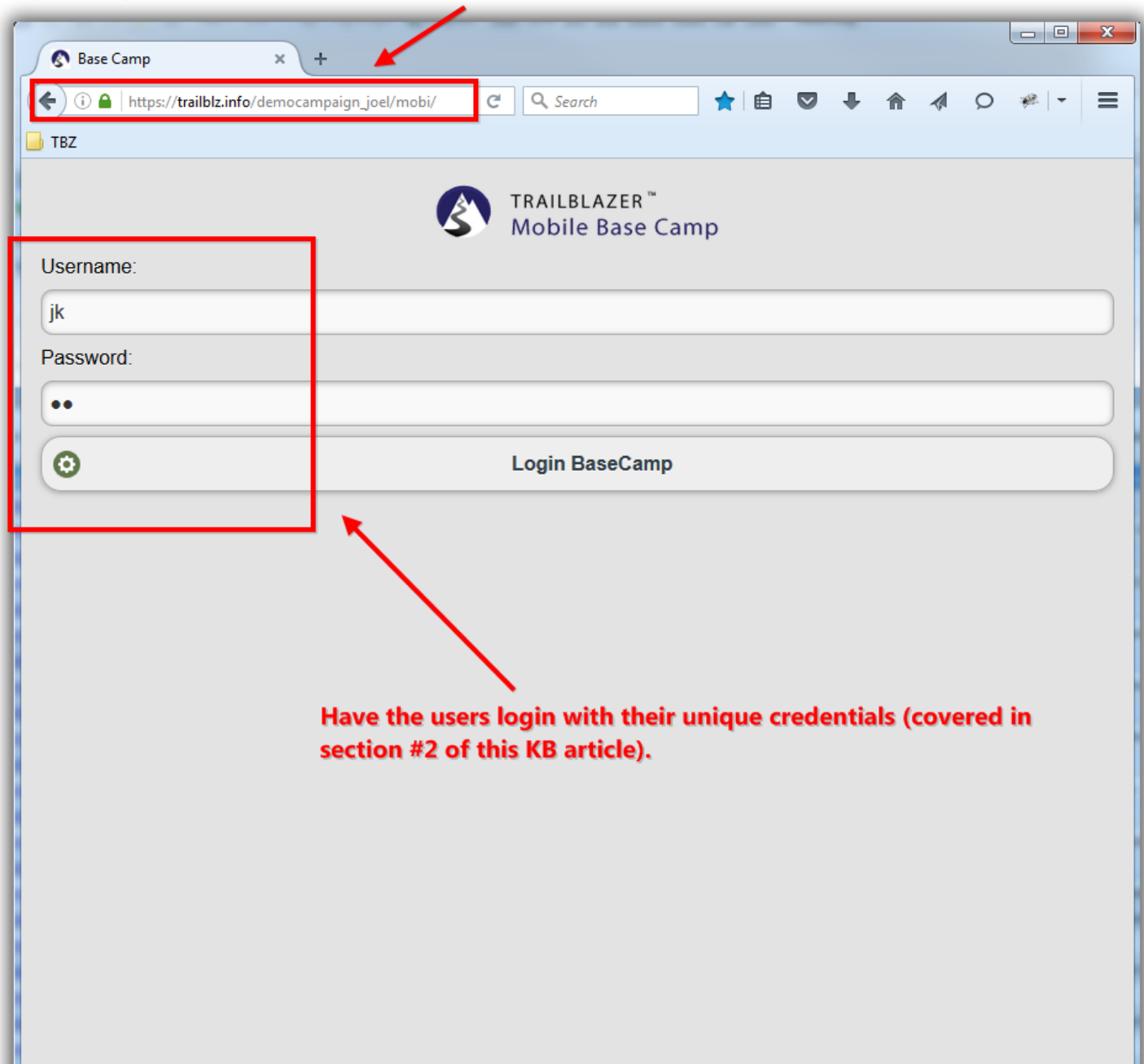
My new example canvassing list prior to running the canvass.

The next section shows how the canvassing list is run on the mobile web app and how to view the data in real-time within the database.

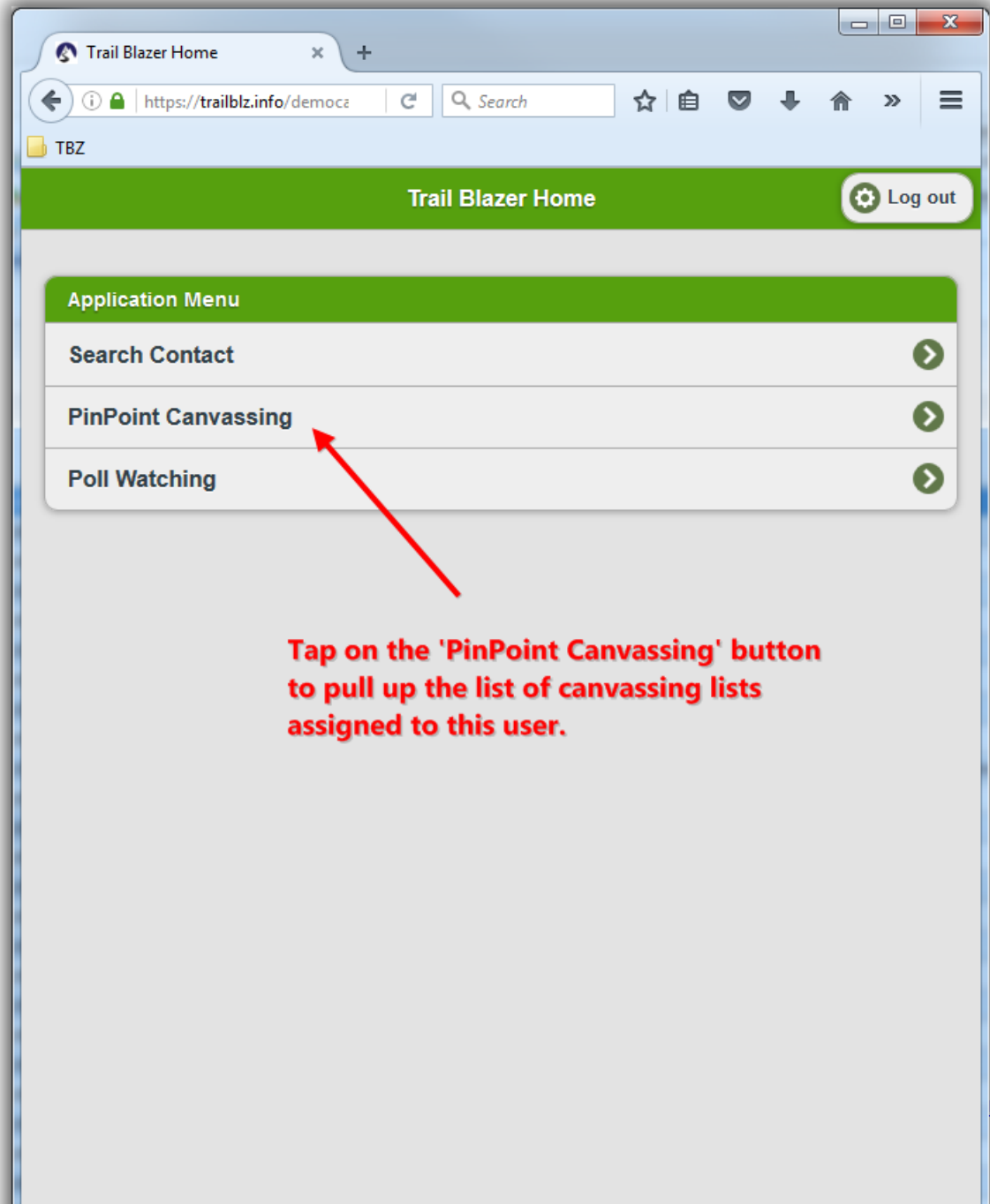
#4 – Running the Canvassing ‘App’ On your Mobile Device

Log into **Mobile Base Camp** on your mobile device (www.trailblz.info/YourDatabaseNameGoesHere/mobi). You'll replace '**YourDatabaseName**' with your org's db name, in my example it was www.trailblz.info/DemoCampaign_Joel/mobi.

Log into Mobile Base Camp at www.trailblz.info/YourDatabaseName/mobi - (you'll replace YourDatatabaseName) with your org's DB Name.



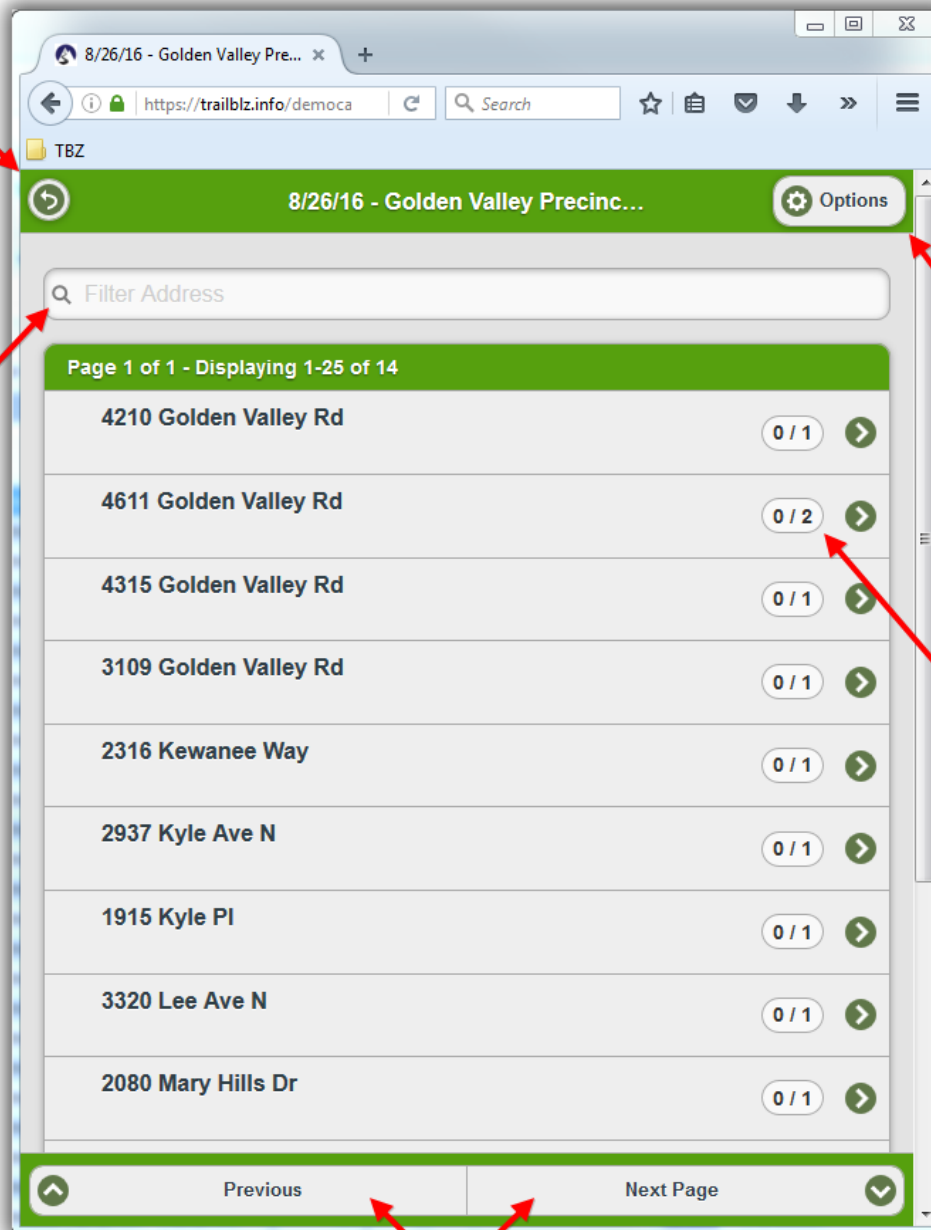
Have the users login with their unique credentials (covered in section #2 of this KB article).



Tap on the 'PinPoint Canvassing' button to pull up the list of canvassing lists assigned to this user.

This will show all of the canvassing lists assigned to this user. *In my example there was one list assigned to my login, with 16 voters in the canvassing list.*

Go back.



Filter the list by street name.

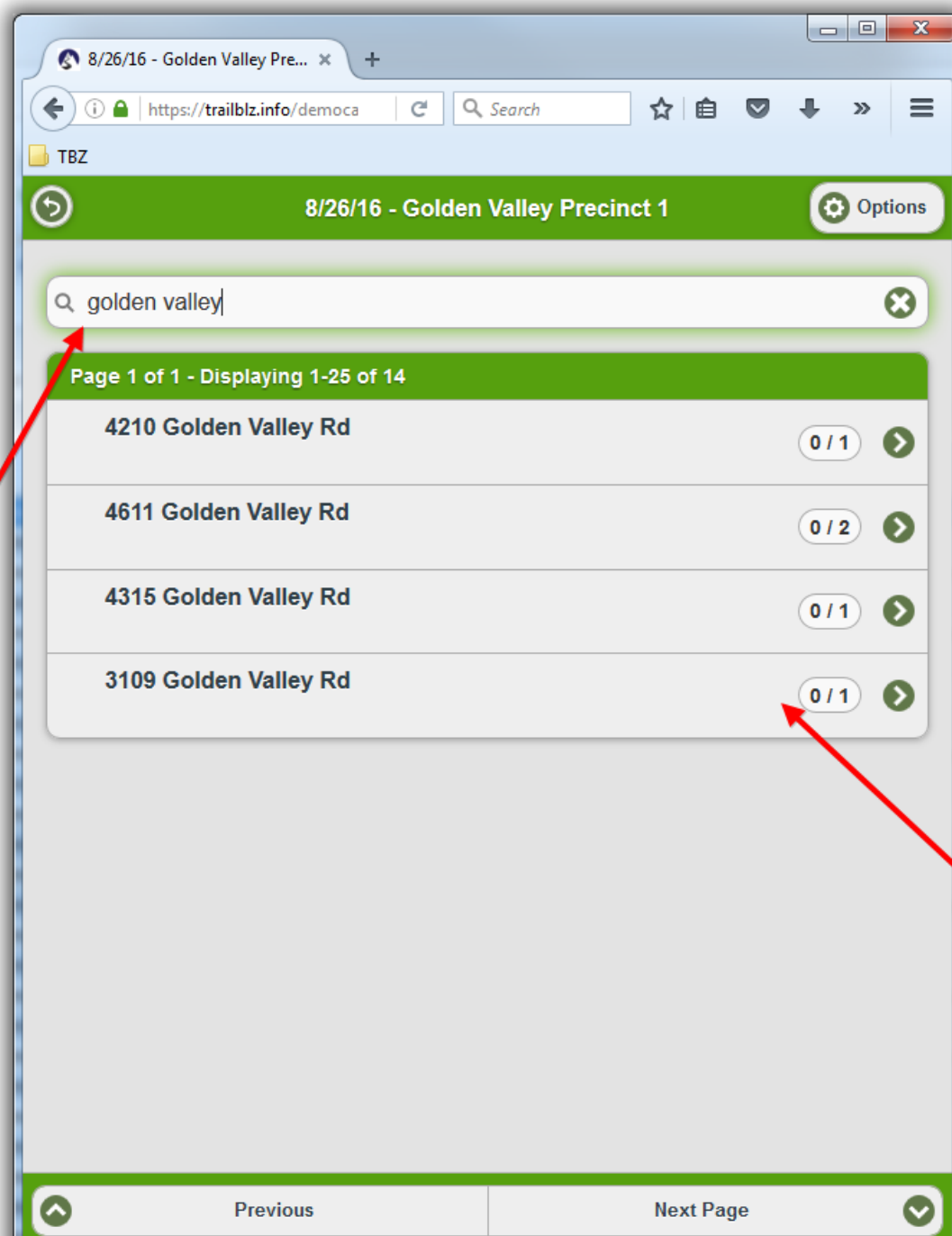
Ex: 'Golden Valley Rd'

Tap this button to set a threshold for how many records to load into the list.

Counts for how many voters live at this address.

Go forward and backward through the different pages

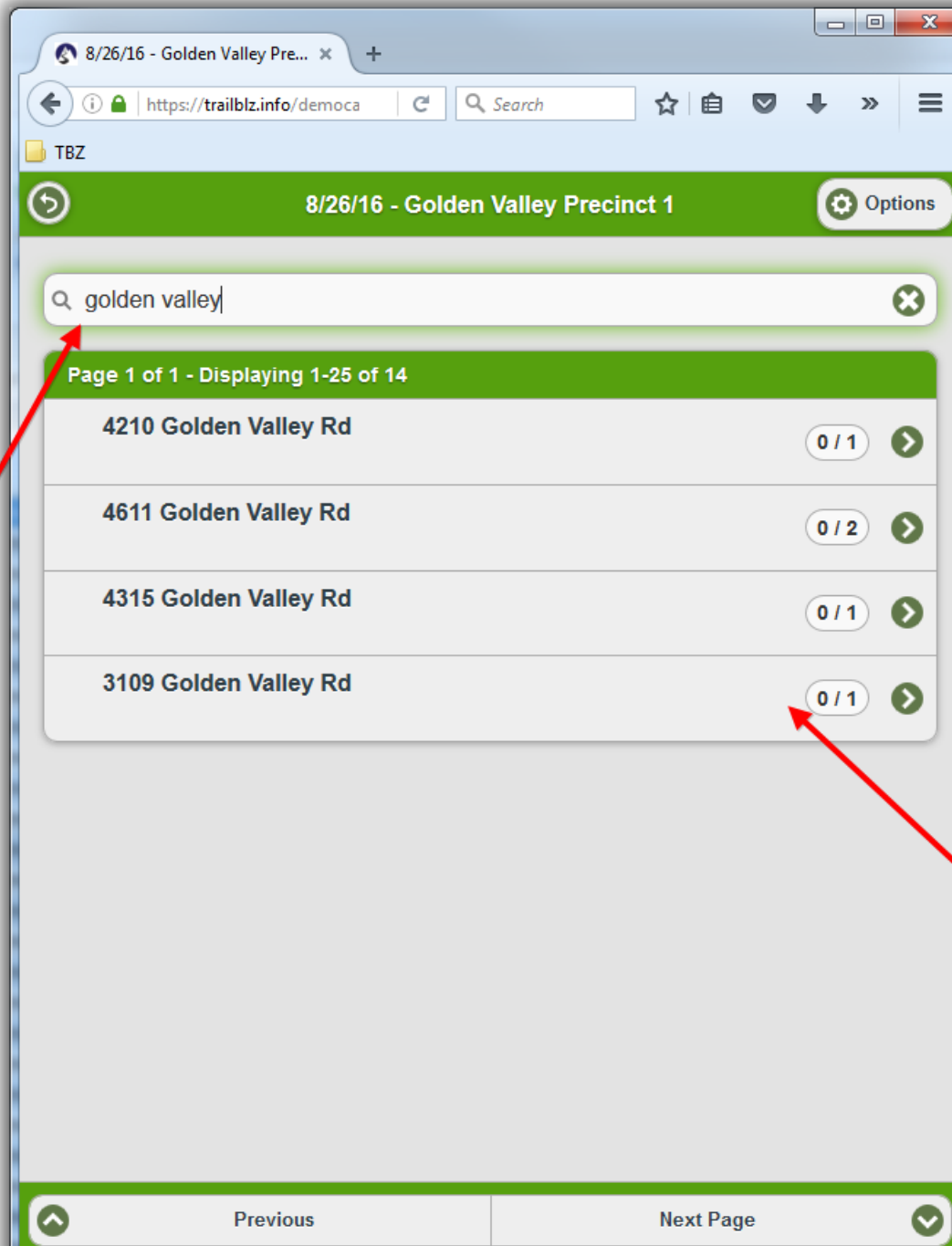
You can filter the list by street by typing all or part of the street you are walking down. *In my example I started with 'Golden Valley Rd'.*



1. Filter the list by typing all or part of a street name.

2. Tap on the address to open up that household to canvass the people who live there.

Tap on the address where you want to canvass the voter(s). *In my example it was **3109 Golden Valley Rd** that had 1 voter living there.*



1. Filter the list by typing all or part of a street name.

2. Tap on the address to open up that household to canvass the people who live there.

Note: *If there's more than one voter living at the address you have the option to canvass each one individually or canvass the entire household at once. In my example it was just a single voter by the name of Steven Scarrow.*

The 2 screenshots below show the details of what you can do within a voter's record card while you're using the mobile canvassing app. Check off the boxes for the questions you're asking, collect their contact info if you want, record a log not (comment), and save once you're finished.

Img 1 of 2 – Top-Half of an Example Voter Record in the PinPoint Canvassing App

Go back to the previous screen.

The address where you are currently door knocking.

Details about the voter(s) who live in this house.

Canvassing Survey

3109 Golden Valley Rd

Select Person Canvassed

Steven Scarrow
47 Gender: M Party: DEM

Question: CANDIDATE SUPPORT

- Doesn't Support Candidate
- Supports Candidate
- Undecided

Question: ISSUES CONCERNED WITH

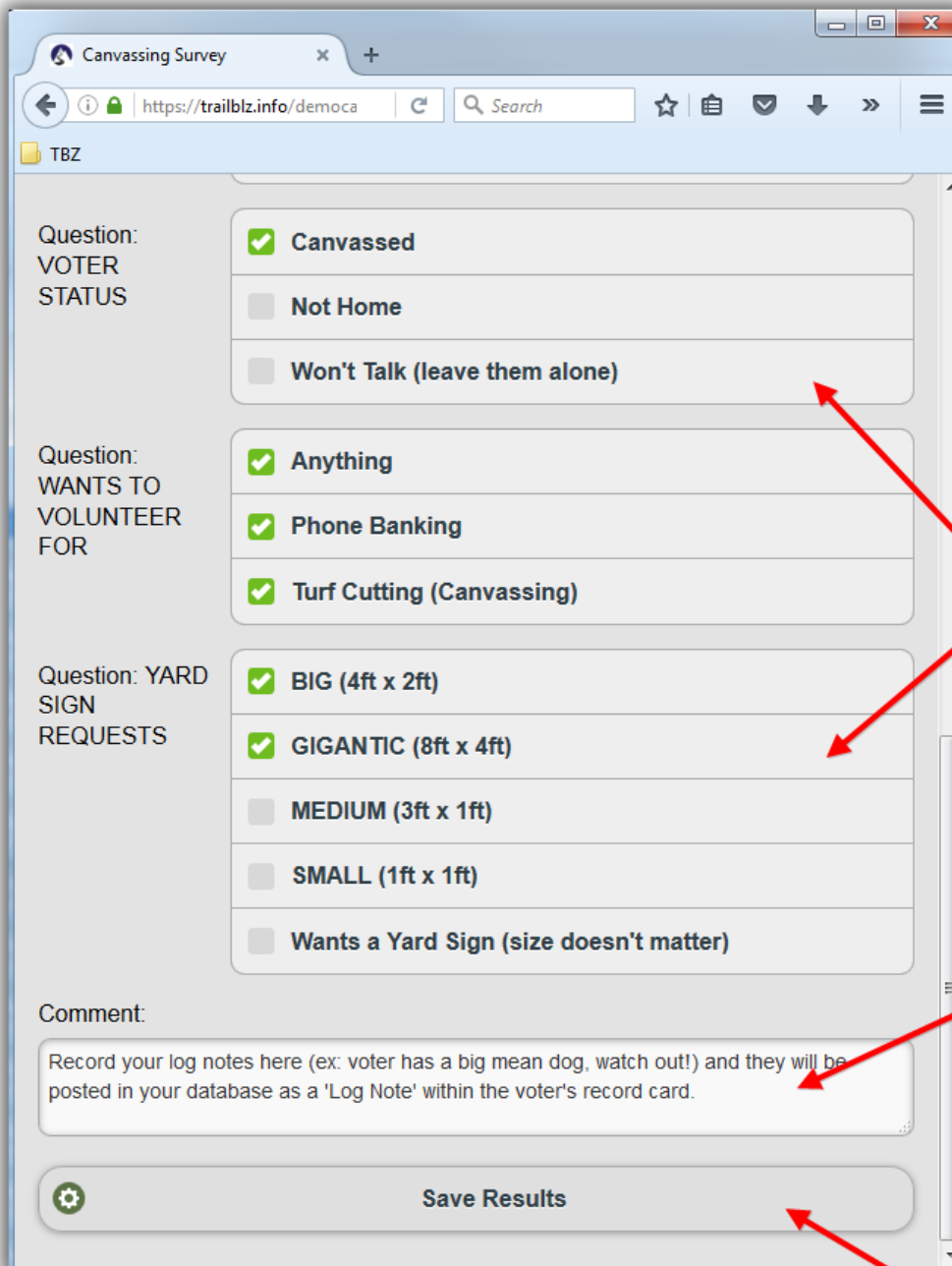
- Education
- Gay Marriage
- Health Care Insurance System
- Minimum Wage
- Nation Building
- Occupation Wars
- State of the Economy

Tap on this button to collect the voter's contact info.

Check off the answers to the questions you're asking. These will post into the backend database as attributes.

Img 2 of 2 – Bottom-Half of an Example Voter Record in the PinPoint Canvassing App

Bottom-Half of the Example Voter I Canvassed



Canvassing Survey

https://trailblz.info/democa

TBZ

Question: VOTER STATUS

- Canvassed
- Not Home
- Won't Talk (leave them alone)

Question: WANTS TO VOLUNTEER FOR

- Anything
- Phone Banking
- Turf Cutting (Canvassing)

Question: YARD SIGN REQUESTS

- BIG (4ft x 2ft)
- GIGANTIC (8ft x 4ft)
- MEDIUM (3ft x 1ft)
- SMALL (1ft x 1ft)
- Wants a Yard Sign (size doesn't matter)

Comment:

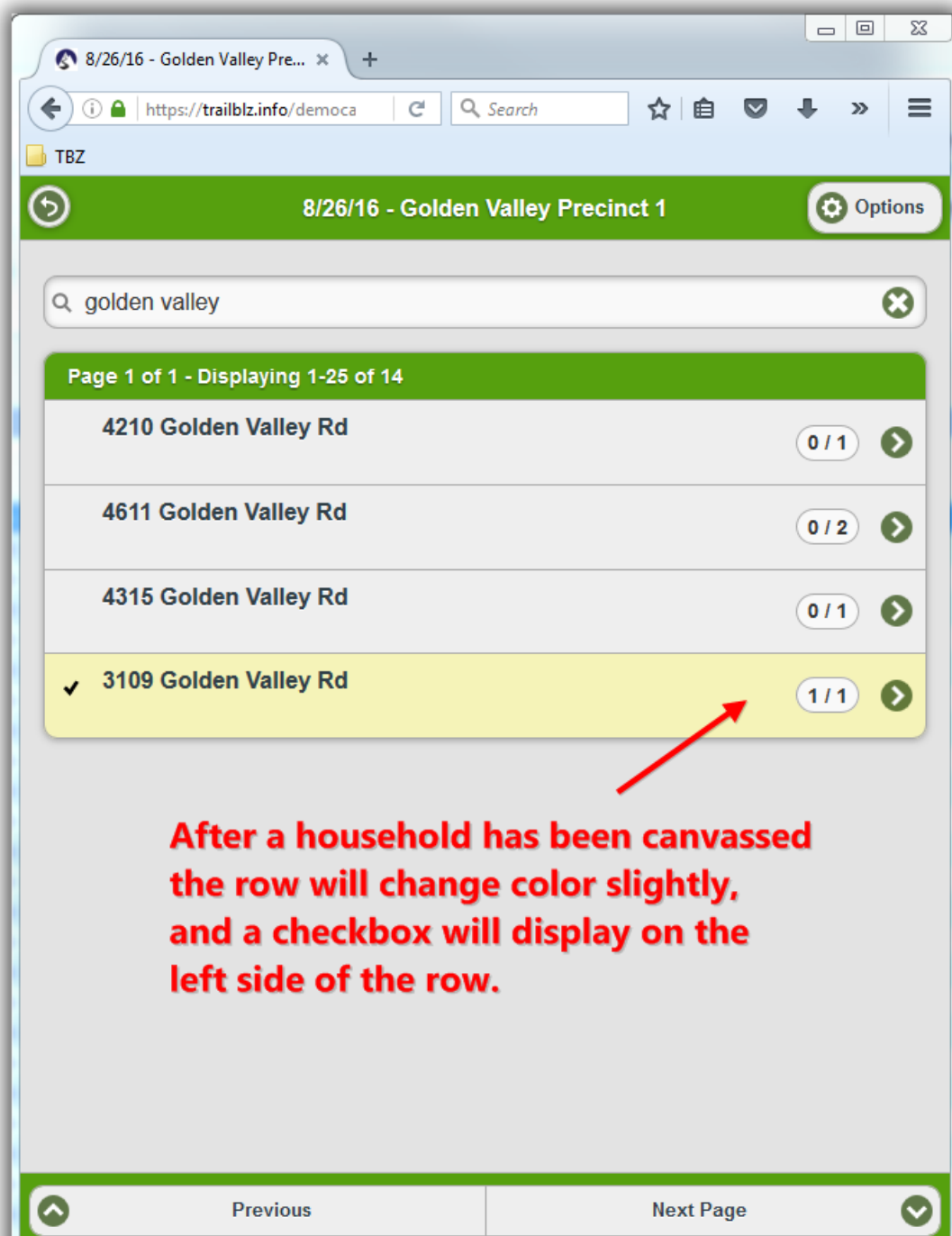
Record your log notes here (ex: voter has a big mean dog, watch out!) and they will be posted in your database as a 'Log Note' within the voter's record card.

Save Results

Check off the answers to your canvassing questions (they will post to the database as attributes).

One of the newer enhancements to the PinPoint Canvassing app is the ability to record a note (log note).

After you save the results the record in the list will turn slightly yellow and display a checkbox on the left, my *example* is below.



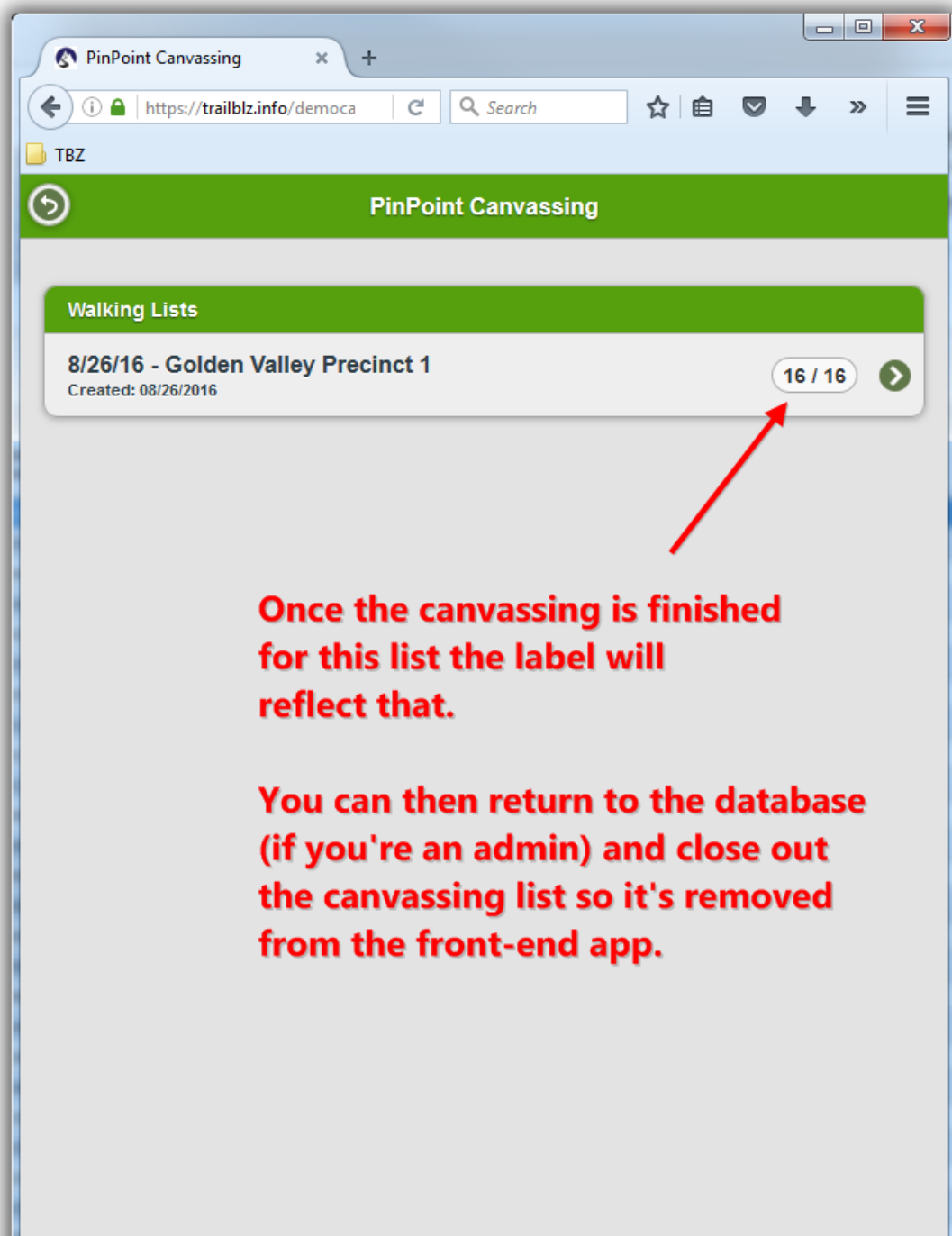
After a household has been canvassed the row will change color slightly, and a checkbox will display on the left side of the row.

Continue these steps until all voters have been canvassed. The list will look like the one below once you're finished.



Continue canvassing until all voters in the list have been covered.

You can then return to the main ‘canvassing lists’ screen to verify all voters have been canvassed:



Once the canvassing is finished for this list the label will reflect that.

You can then return to the database (if you're an admin) and close out the canvassing list so it's removed from the front-end app.

The final section of this article will show how to provide a database user access to the canvassing list *in the backend database* and how to view the results as they're collected in real-time.


#5 – Searching and Analyzing the Canvassing Results in your Database

Log into the backend database.

Important: It's a requirement that you have the 'Allow Mass Updates' [security clearance](#) in order to access the canvassing list:

File Edit | New Contact

Title: [Dropdown]
 First Name: Example User - Canvassing Access In DB
 Middle Name: [Text]
 Last Name/Suffix: [Text]
 Prior Last Name: [Text]
 Nickname: [Text]
 Contact Type: Individual [Dropdown]
 Candidate FEC: (none) [Dropdown]
 Committee FEC Id: [Text]

 No Photo
Email
 No Email Address
Employer / Occupation
 No Employer / No Occupation

Home Address
 No Address
Work Address
 No Address

General Household Gallery Vote History Attribute Poll Relation Financial Pledge Event Logs Lawn Sales Admin

Control Logon Attributes Settings Filter

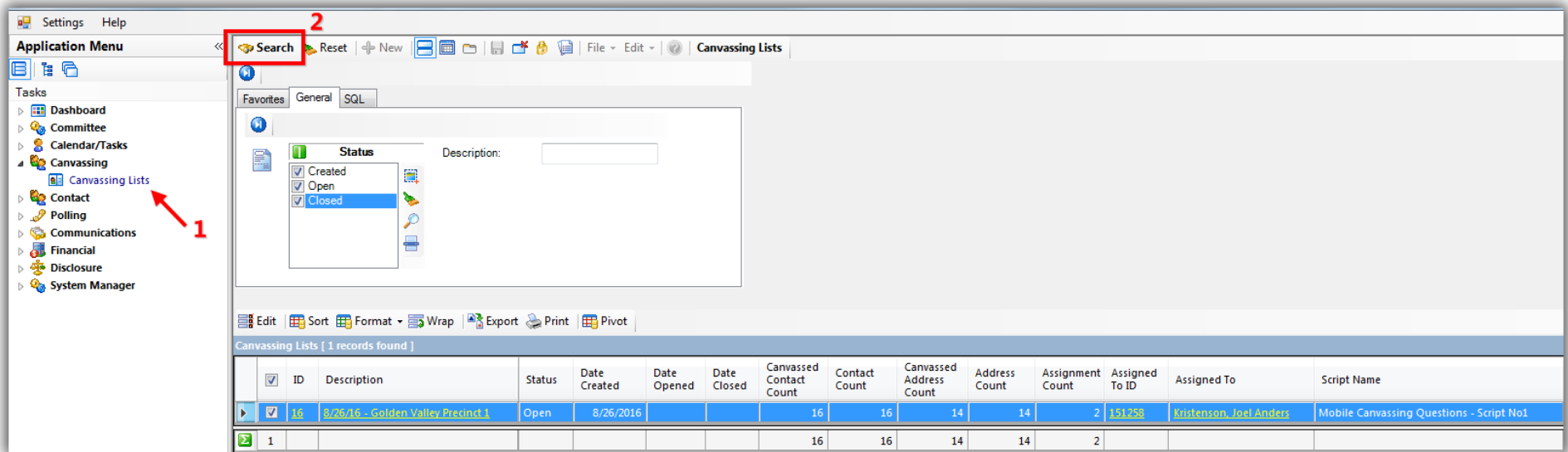
Attribute	Yes	Date	Note
Security	<input checked="" type="checkbox"/>		
Applications	<input checked="" type="checkbox"/>		
Calendar	<input type="checkbox"/>		
Email	<input type="checkbox"/>		
Financial	<input type="checkbox"/>		
Polling	<input type="checkbox"/>		
Security Management	<input type="checkbox"/>		
Text	<input type="checkbox"/>		
Voter	<input checked="" type="checkbox"/>		
Activities	<input checked="" type="checkbox"/>		
Allow Add/Edit of Attributes	<input checked="" type="checkbox"/>	8/30/2016	
Allow Updating of Log Dates	<input checked="" type="checkbox"/>	8/30/2016	
Contribution	<input type="checkbox"/>		
Data	<input type="checkbox"/>		
Allow Read Access	<input type="checkbox"/>		
Allow Write Access	<input type="checkbox"/>		
Data	<input checked="" type="checkbox"/>		
Allow Read Access	<input checked="" type="checkbox"/>	8/30/2016	
Allow Write Access	<input checked="" type="checkbox"/>	8/30/2016	
Global	<input checked="" type="checkbox"/>		
Activities	<input checked="" type="checkbox"/>		
Allow Data Export	<input type="checkbox"/>		
Allow Data Import	<input type="checkbox"/>		
Allow Mass Updates	<input checked="" type="checkbox"/>	8/30/2016	
Start Page	<input type="checkbox"/>		

Logon = Joel Kristenson

Email... Save Save and Close Cancel

At the bare minimum your database user security configuration has to have these security attributes to access the 'Canvassing List' within the backend DB.

Under the **Application Menu** navigate to the **Canvassing Lists**, and click **[Search]**. *In my example I had 1 list as shown below.*



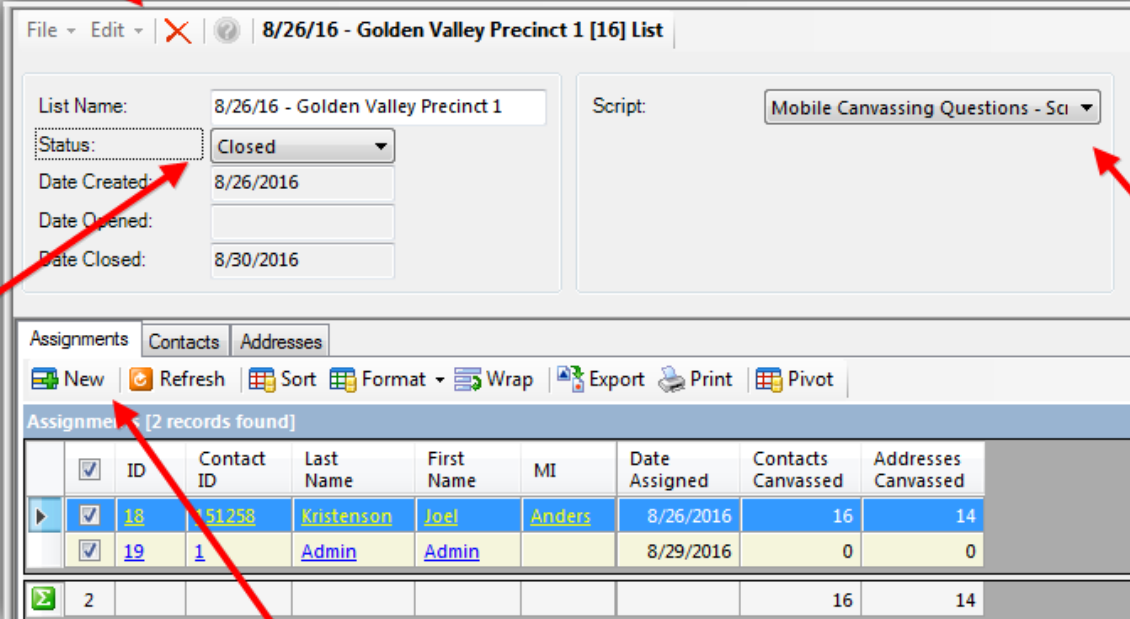
The screenshot shows the TrailBlazer application interface. The 'Application Menu' is at the top left, with a 'Search' button highlighted by a red box and a red arrow labeled '2'. The 'Canvassing Lists' menu item is highlighted by a red arrow labeled '1'. The main content area shows a search results table for 'Canvassing Lists' with 1 record found. The table has the following data:

ID	Description	Status	Date Created	Date Opened	Date Closed	Canvassed Contact Count	Contact Count	Canvassed Address Count	Address Count	Assignment Count	Assigned To ID	Assigned To	Script Name
16	8/26/16 - Golden Valley Precinct 1	Open	8/26/2016			16	16	14	14	2	131258	Kristenson, Joel Anders	Mobile Canvassing Questions - Script No1

Overall results from your canvassing list(s).

Click on the 'Description' link to open the canvassing list.

You can delete the list if nobody has been canvassed yet.



Change the status from this drop-down.

Closing out the list will remove it from the online app.

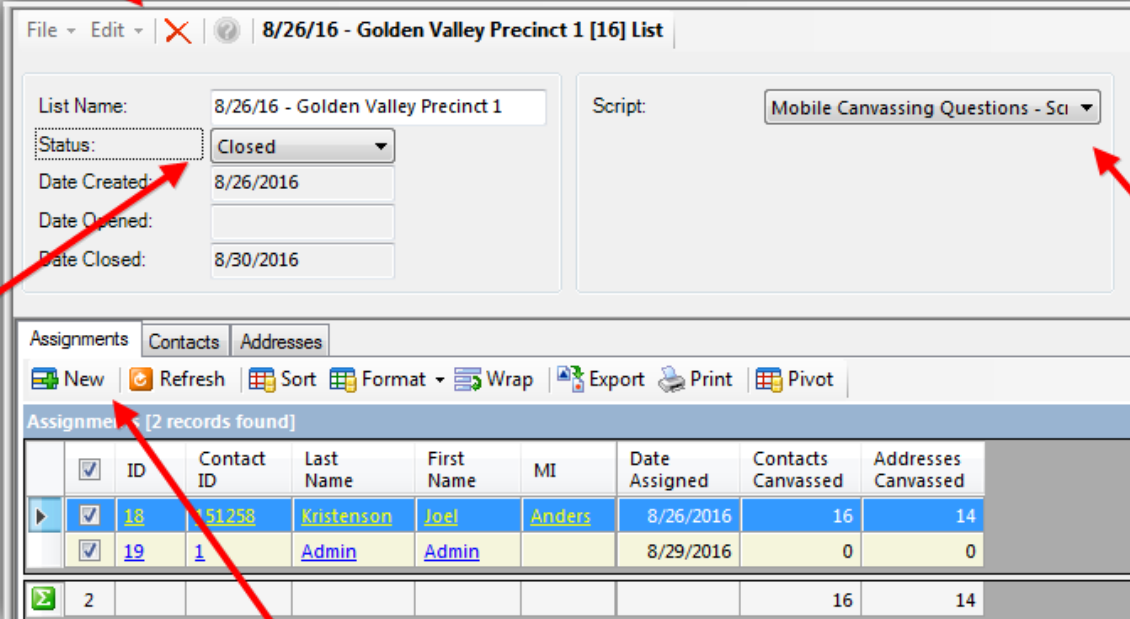
Change the script that's being used if need be.

Modify who the list is assigned to.

Once the list is open you can do all kinds of things (shown below) such as:

- Delete the list if nobody has been canvassed
- Change the script
- Modify who the list is assigned to
- Change the status (open/closed)

You can delete the list if nobody has been canvassed yet.



Change the status from this drop-down.

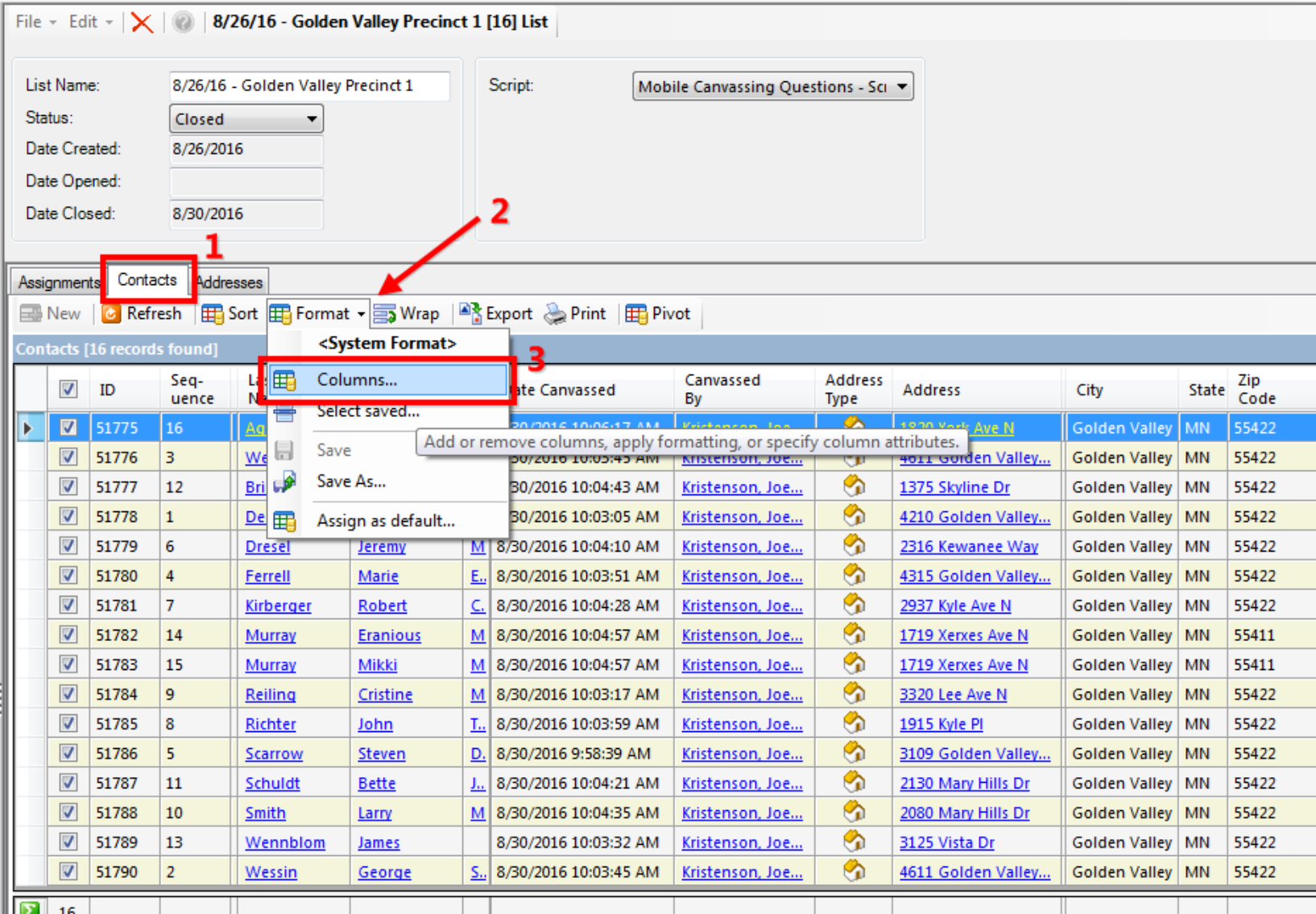
Closing out the list will remove it from the online app.

Change the script that's being used if need be.

Modify who the list is assigned to.

To view the **canvassing results and get totals** navigate to the **Contacts** tab, click on the **[Format]** drop-down menu, and select **Columns**.

To begin evaluating the canvassing results navigate to the Contacts tab, click the [Format] drop-down and select 'Columns...'



The screenshot shows the TrailBlazer software interface. At the top, there's a header bar with 'File', 'Edit', and a search icon. Below it, the title bar reads '8/26/16 - Golden Valley Precinct 1 [16] List'. The main area is divided into a top section for list details and a bottom section for a data table.

1 points to the 'Contacts' tab in the 'Assignments' section.

2 points to the 'Format' menu in the toolbar.

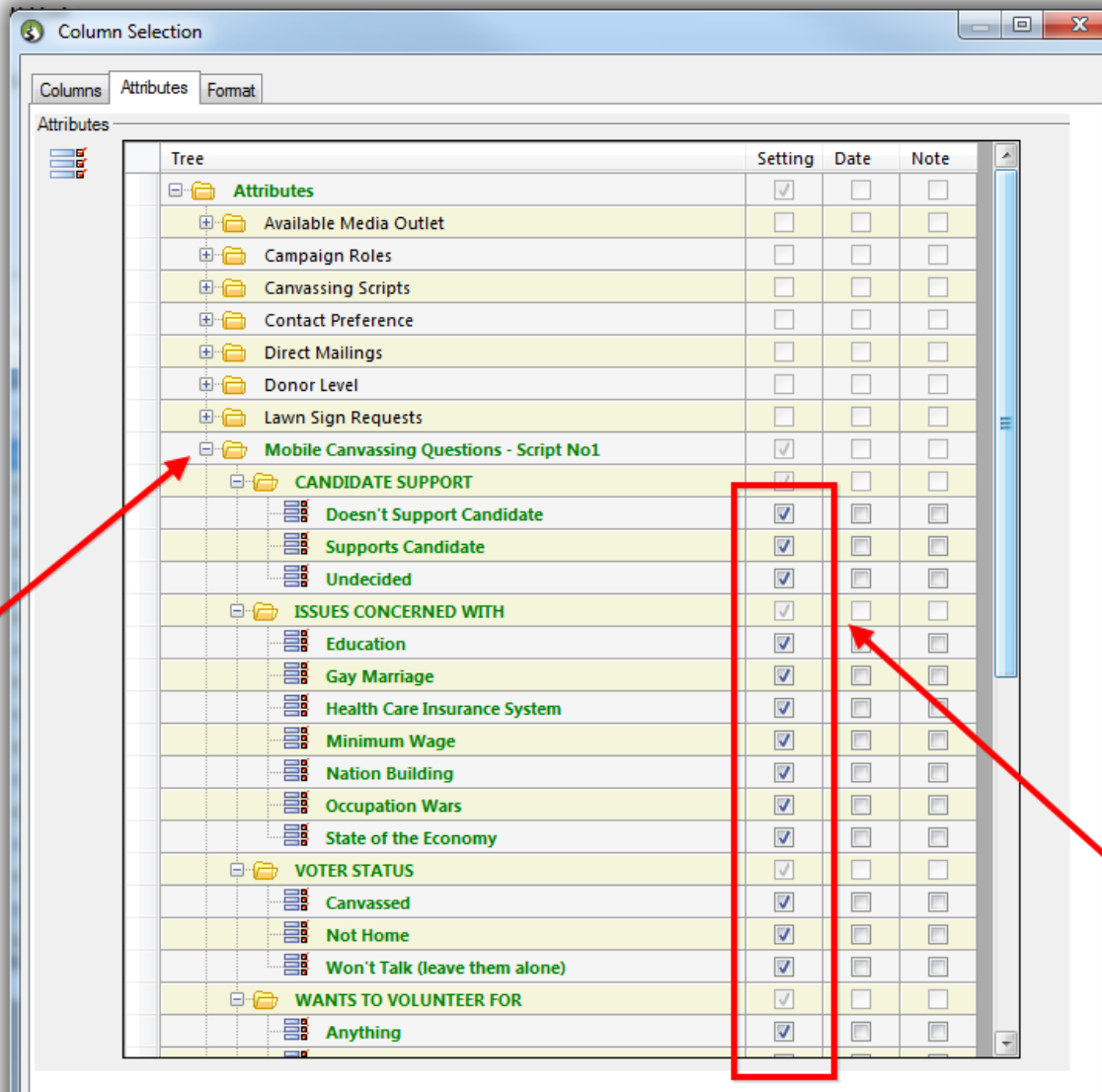
3 points to the 'Columns...' option in the 'Format' dropdown menu.

The data table below has the following columns: ID, Sequence, Last Name, First Name, Date Canvassed, Canvassed By, Address Type, Address, City, State, Zip Code.

ID	Sequence	Last Name	First Name	Date Canvassed	Canvassed By	Address Type	Address	City	State	Zip Code
51775	16	Ag...		8/30/2016 10:05:17 AM	Kristenson, Joe...		1820 York Ave N	Golden Valley	MN	55422
51776	3	We...		8/30/2016 10:05:45 AM	Kristenson, Joe...		4611 Golden Valley...	Golden Valley	MN	55422
51777	12	Bri...		8/30/2016 10:04:43 AM	Kristenson, Joe...		1375 Skyline Dr	Golden Valley	MN	55422
51778	1	De...		8/30/2016 10:03:05 AM	Kristenson, Joe...		4210 Golden Valley...	Golden Valley	MN	55422
51779	6	Dresel	Jeremy	8/30/2016 10:04:10 AM	Kristenson, Joe...		2316 Kewanee Way	Golden Valley	MN	55422
51780	4	Ferrell	Marie	8/30/2016 10:03:51 AM	Kristenson, Joe...		4315 Golden Valley...	Golden Valley	MN	55422
51781	7	Kirberger	Robert	8/30/2016 10:04:28 AM	Kristenson, Joe...		2937 Kyle Ave N	Golden Valley	MN	55422
51782	14	Murray	Eranious	8/30/2016 10:04:57 AM	Kristenson, Joe...		1719 Xerxes Ave N	Golden Valley	MN	55411
51783	15	Murray	Mikki	8/30/2016 10:04:57 AM	Kristenson, Joe...		1719 Xerxes Ave N	Golden Valley	MN	55411
51784	9	Reiling	Cristine	8/30/2016 10:03:17 AM	Kristenson, Joe...		3320 Lee Ave N	Golden Valley	MN	55422
51785	8	Richter	John	8/30/2016 10:03:59 AM	Kristenson, Joe...		1915 Kyle Pl	Golden Valley	MN	55422
51786	5	Scarrow	Steven	8/30/2016 9:58:39 AM	Kristenson, Joe...		3109 Golden Valley...	Golden Valley	MN	55422
51787	11	Schuldt	Bette	8/30/2016 10:04:21 AM	Kristenson, Joe...		2130 Mary Hills Dr	Golden Valley	MN	55422
51788	10	Smith	Larry	8/30/2016 10:04:35 AM	Kristenson, Joe...		2080 Mary Hills Dr	Golden Valley	MN	55422
51789	13	Wennblom	James	8/30/2016 10:03:32 AM	Kristenson, Joe...		3125 Vista Dr	Golden Valley	MN	55422
51790	2	Wessin	George	8/30/2016 10:03:45 AM	Kristenson, Joe...		4611 Golden Valley...	Golden Valley	MN	55422

Navigate to the **Attributes** tab, under the **'Setting'** column check all of the attributes that were in your 'Canvassing Script' folder, and then click **[OK]**. The entire set of attributes (questions/answers) will be added to the grid as columns. *My example is below.*

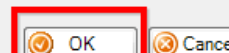
Adding attributes (canvassing questions/answers) to the grid via formatting.



1. Expand the folder(s) for the canvassing questions you used for this canvassing list.

2. Check the boxes under the 'Setting' column.

3



Scroll to the far right of the grid where your canvassing results will now display with totals at the bottom. *My example is below.*

You can print the results and/or export them to a spreadsheet.

The attributes (canvassing questions) will display on the far right of the grid with totals at the bottom of each column.

ID	Sequence	Voter ID	Last Name	First Name	MI	Birth Date	Gender	County	CD	SD	LD	Reg Id	Doesn't Support Candidate	Supports Candidate	Undecided	Education	Gay Marriage	Health Care Insurance System	Minimum Wage	Nation Building	Occupation Wars	State of the Economy	Canvassed	Not Home
51775	16	243	Agnew	Robert	Steven	1/1/1952	M	Hennepin	05	45	45B	1106508	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
51776	3	3665	Wessin	Sue	Ann	1/1/1953	F	Hennepin	05	45	45B	1271580	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
51777	12	5002	Brill	Josiah	Eschel	1/1/1928	M	Hennepin	05	45	45B	1123261	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
51778	1	8992	Demesy	Jacqueline	K	1/1/1953	F	Hennepin	05	45	45B	1005471	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
51779	6	9782	Dresel	Jeremy	Michael	1/1/1977	M	Hennepin	05	45	45B	665176	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
51780	4	11653	Ferrell	Marie	Elena	1/1/1947	F	Hennepin	05	45	45B	995887	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
51781	7	21569	Kirberger	Robert	Charles	1/1/1929	M	Hennepin	05	45	45B	989873	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
51782	14	29301	Murray	Eranius	Mcneil	1/1/1938		Hennepin	05	45	45B	1236386	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
51783	15	29312	Murray	Mikki	Mokihana	1/1/1965	F	Hennepin	05	45	45B	1075190	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
51784	9	34644	Reiling	Cristine	Marie	1/1/1969	F	Hennepin	05	45	45B	2271251	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
51785	8	35044	Richter	John	Twiss	1/1/1923	M	Hennepin	05	45	45B	1075359	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
51786	5	36904	Scarrow	Steven	Donald	1/1/1970	M	Hennepin	05	45	45B	1411394	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
51787	11	37599	Schuldt	Bette	Jean	1/1/1928	F	Hennepin	05	45	45B	989928	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
51788	10	39260	Smith	Larry	Max	1/1/1934	M	Hennepin	05	45	45B	990910	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
51789	13	44764	Wennblom	James		1/1/1931	M	Hennepin	05	45	45B	989958	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
51790	2	44836	Wessin	George	Stanley	1/1/1953	M	Hennepin	05	45	45B	954877	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
16													5	8	2	8	9	10	10	7	5	5	12	0

Totals will display at the bottom of each attribute column.

If you want you can [save the format](#) for future use and assign it as the default for your (or all users) so that the results always display when this specific canvassing list is opened in the future. You can also export the results to a spreadsheet and/or print them using the buttons on the tool strip.

The related resources below will teach a lot more about canvassing, formatting, poll watching, and other related topics. Give us a call if you have any trouble getting your canvassing lists setup and running (**1-866-909-8700**).



Trail Blazer™

- YouTube Channel
- Knowledge Base Articles
- 3rd Party Resources

Related Resources

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