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**Author:** Kristenson, Joel


**Last Updated:** 2020-10-20

## Overview

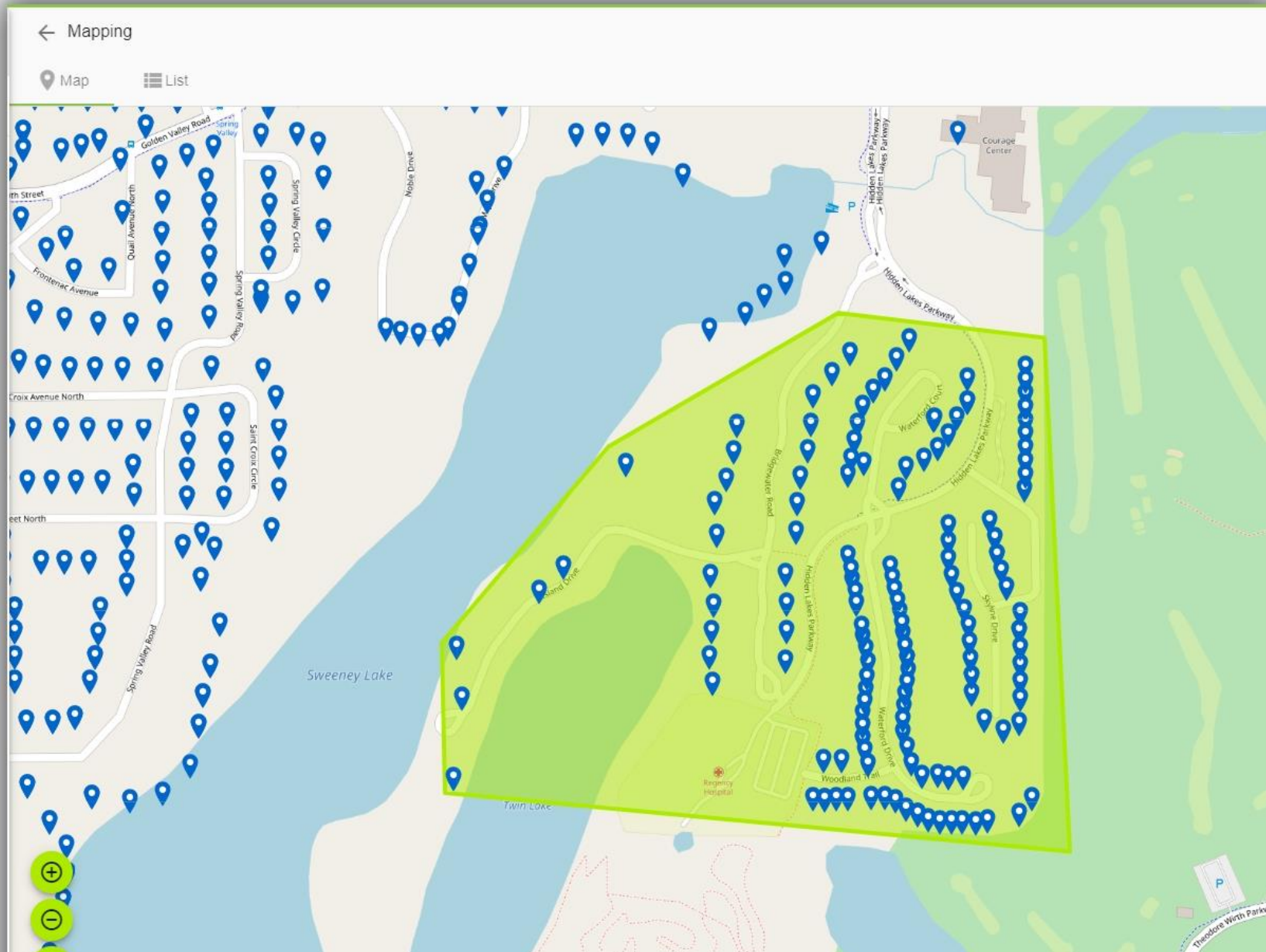
Learn how to build and run a **mobile canvassing (walk)** list. This tutorial covers all of the steps to create a canvassing **Script**, **create user accounts** for your canvassers, **assign** the list voters/contacts to your users (canvassers), and how to use the [Android](#) and [iPhone](#) apps in the field. The final section shows how to build reports (formats) to analyze the canvassing **results** in your **Trail Blazer** database. *Learn more about the canvassing apps by watching [this video](#).*

## Outline

1. Creating Canvassing Questions (Script)
2. Creating New Canvassers (DB Users with Access to the Mobile Apps)
3. Build a Targeted List of Voters/Contacts to Canvass and Assign the List (and Script) to your Canvassers
4. Using the Trail Blazer Basecamp App to Canvass Voters/Households
5. Build a Format to Analyze the Canvassing Results
6. Related Resources

 **Tip:** Take advantage of our **Turf Cutting** tools to build **targeted** door-knocking lists off of an interactive **map**. Watch [this video](#) to learn how.  
*Here's an example:*

## Example canvassing list created with the Trail Blazer IQ Turf Cutting tools.

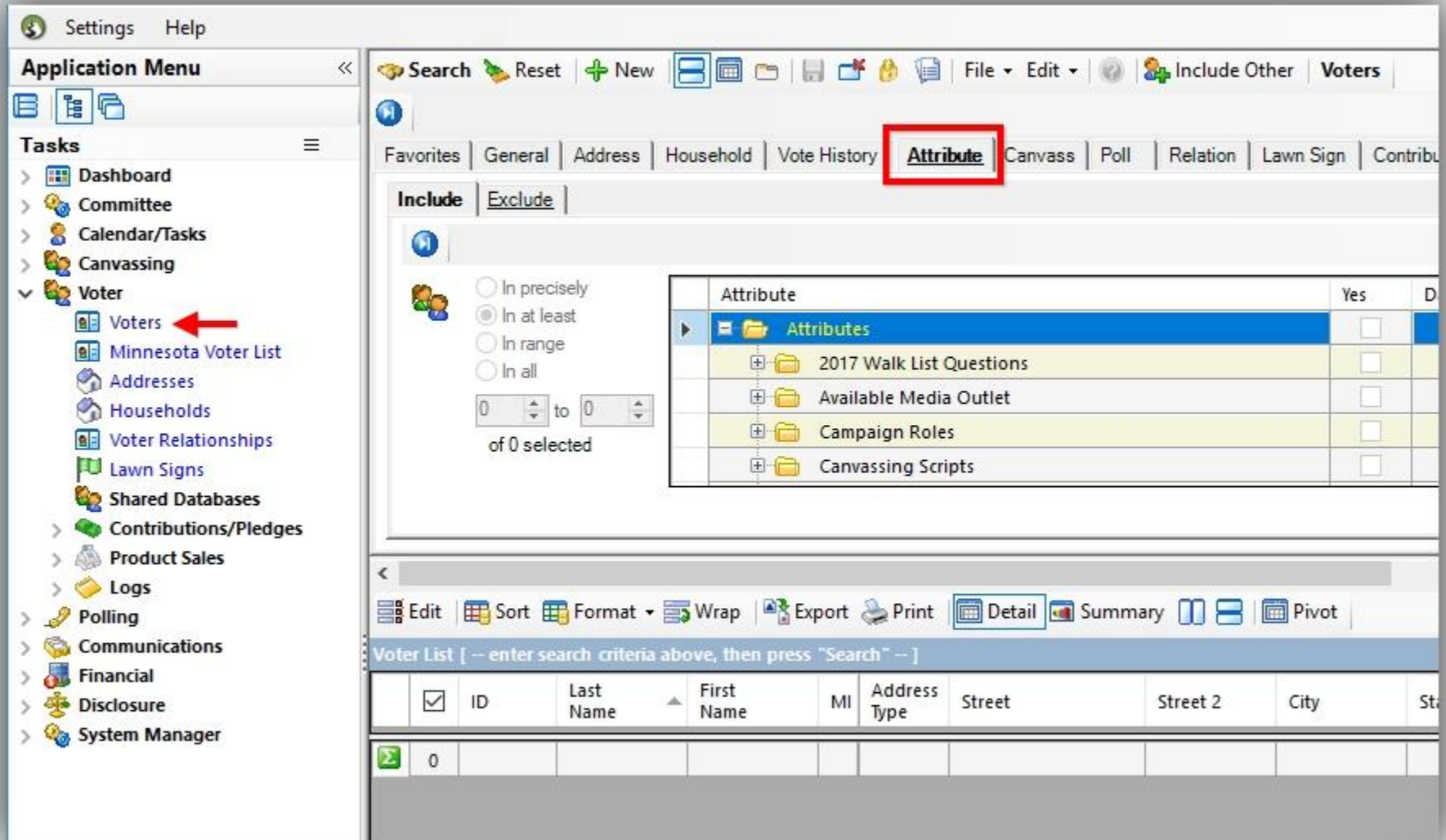


## 1. Creating Canvassing Questions (Script)

First, you'll need to create the **canvassing questions (script)** that your door-knockers will be asking. These questions are powered by the [attribute](#) system. *With some of the recent updates the mobile app in 2018, you're now **\*required\*** to create **sub-folders** for each section of canvassing questions (attribute items).*

Navigate to the **Voters** list > **Attributes** tab.

## Create and Run a Mobile Canvassing (Walk) List – Setting Up Users, Creating a Script, Etc.



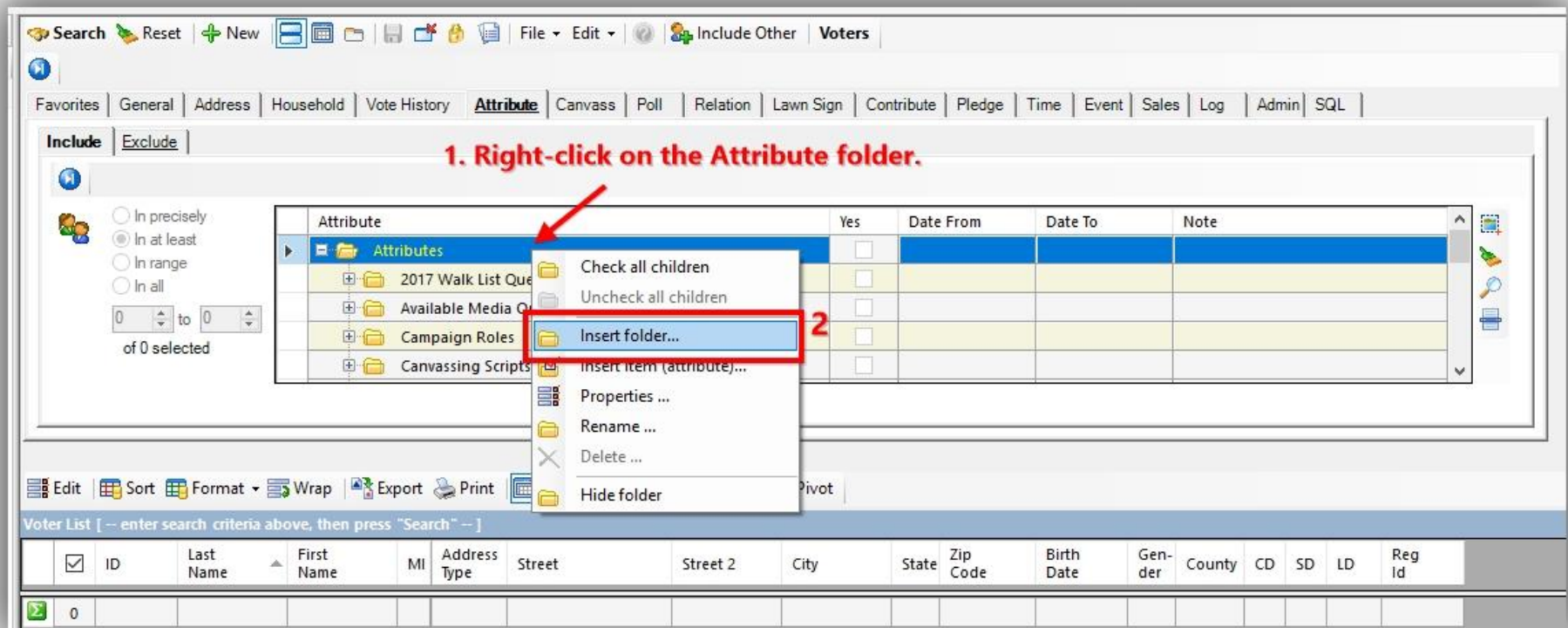
The screenshot shows the TrailBlazer application interface. On the left is the 'Application Menu' with a 'Tasks' section. Under 'Tasks', the 'Voter' sub-menu is expanded, and the 'Voters' option is highlighted with a red arrow. The main window displays the 'Attribute' configuration screen for a voter list. The 'Attribute' tab is highlighted with a red box. Below the tabs, there are 'Include' and 'Exclude' sections. The 'Include' section has radio buttons for 'In precisely', 'In at least', 'In range', and 'In all', with 'In at least' selected. Below these are input fields for a range (0 to 0) and the text 'of 0 selected'. A table lists attributes with checkboxes for 'Yes' and 'No'.

Attribute	Yes	No
Attributes	<input type="checkbox"/>	<input type="checkbox"/>
2017 Walk List Questions	<input type="checkbox"/>	<input type="checkbox"/>
Available Media Outlet	<input type="checkbox"/>	<input type="checkbox"/>
Campaign Roles	<input type="checkbox"/>	<input type="checkbox"/>
Canvassing Scripts	<input type="checkbox"/>	<input type="checkbox"/>

At the bottom of the interface, there is a toolbar with options like Edit, Sort, Format, Wrap, Export, Print, Detail, Summary, and Pivot. Below the toolbar is a search bar and a table header for a 'Voter List'.

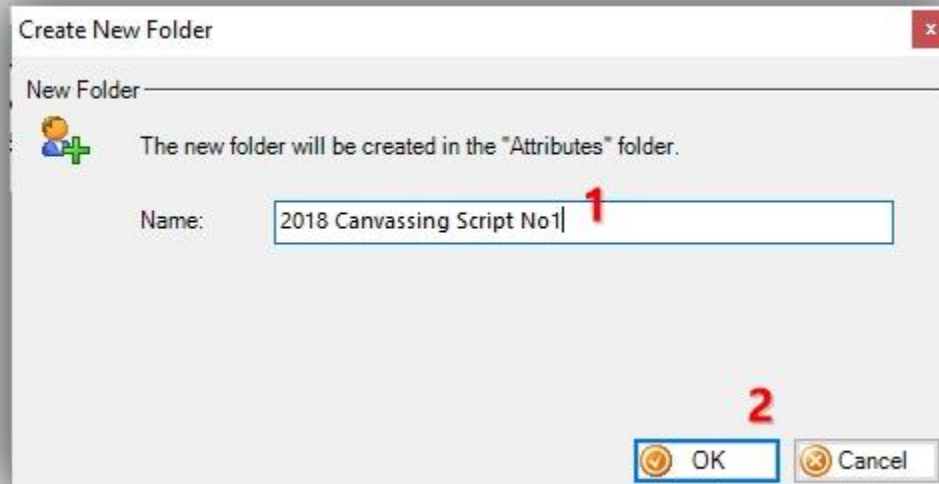
	ID	Last Name	First Name	MI	Address Type	Street	Street 2	City	St
Σ	0								

Right-click on the **Attributes** folder and select **Insert folder...**



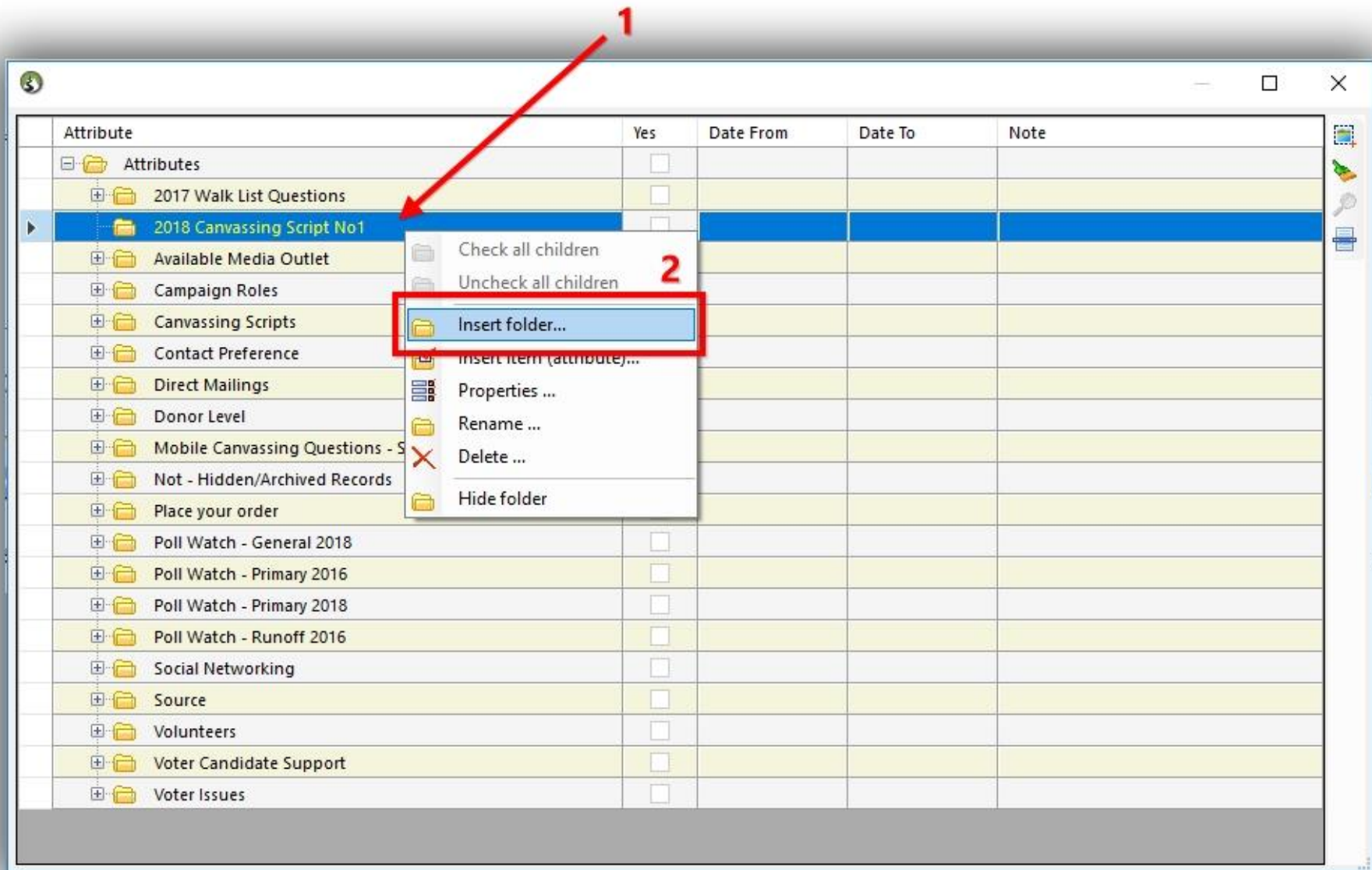
Give the folder a **name**, and then click **[OK]**. *The name of the attribute folder will be the name of your canvassing script, my example is below.*





Next you'll *need* to create sub-folders to place your canvassing questions (attribute items) into. **Right-click** on your new primary folder and select **Insert folder...**

## Create and Run a Mobile Canvassing (Walk) List – Setting Up Users, Creating a Script, Etc.



The screenshot displays the TrailBlazer software interface. A table lists various attributes, and a context menu is open over the '2018 Canvassing Script No1' folder. A red arrow labeled '1' points to the folder, and a red box labeled '2' highlights the 'Insert folder...' option in the menu.

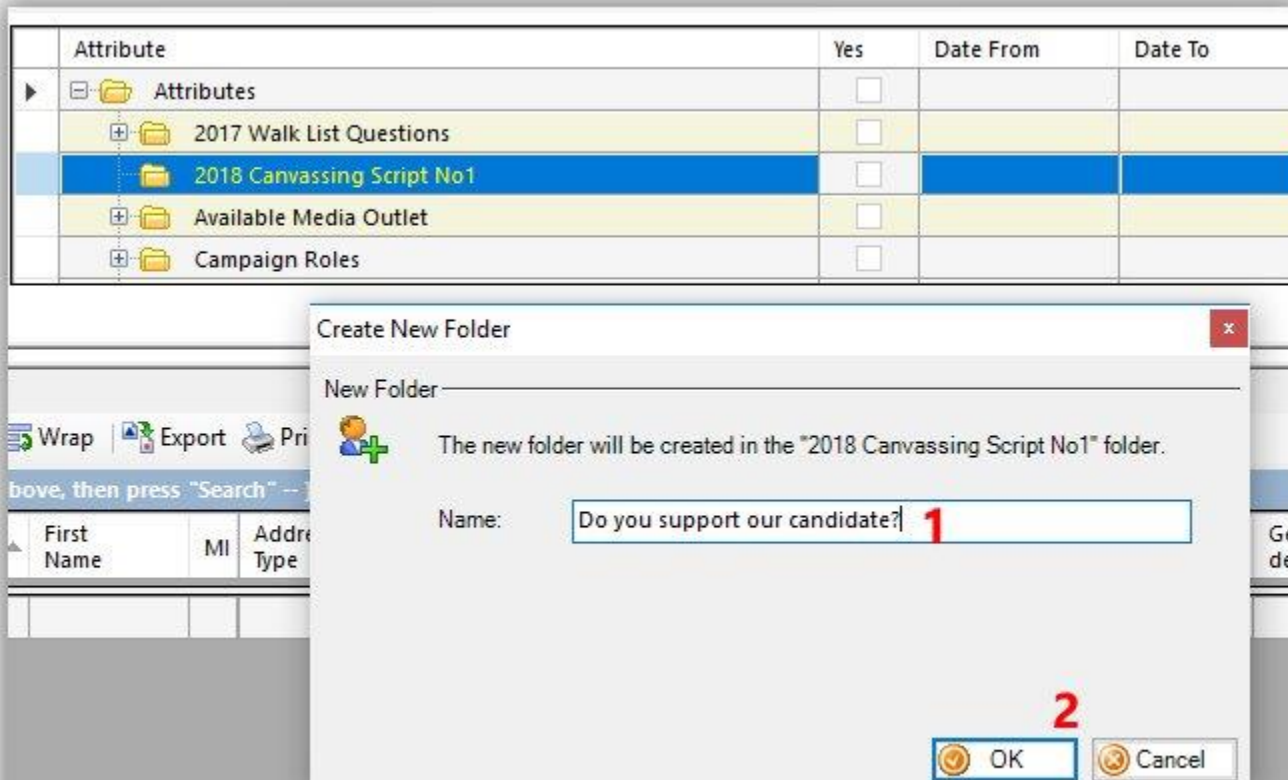
Attribute	Yes	Date From	Date To	Note
Attributes	<input type="checkbox"/>			
2017 Walk List Questions	<input type="checkbox"/>			
<b>2018 Canvassing Script No1</b>	<input type="checkbox"/>			
Available Media Outlet	<input type="checkbox"/>			
Campaign Roles	<input type="checkbox"/>			
Canvassing Scripts	<input type="checkbox"/>			
Contact Preference	<input type="checkbox"/>			
Direct Mailings	<input type="checkbox"/>			
Donor Level	<input type="checkbox"/>			
Mobile Canvassing Questions - S	<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"/>			
Volunteers	<input type="checkbox"/>			
Voter Candidate Support	<input type="checkbox"/>			
Voter Issues	<input type="checkbox"/>			

Context Menu Options:

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



Give your attribute **sub-folder** a name and click **[OK]**. *The name you give the folder is what will show up as the ‘canvassing question’ on the mobile app. My example is below.*



The screenshot shows the TrailBlazer interface with a 'Create New Folder' dialog box open. The dialog box has a title bar 'Create New Folder' and a close button. Below the title bar, it says 'New Folder' followed by a plus icon and a message: 'The new folder will be created in the "2018 Canvassing Script No1" folder.' There is a text input field labeled 'Name:' containing the text 'Do you support our candidate?' with a red '1' next to it. At the bottom of the dialog box, there are two buttons: 'OK' and 'Cancel', with a red '2' above the 'OK' button. In the background, a table is visible with columns 'Attribute', 'Yes', 'Date From', and 'Date To'. The '2018 Canvassing Script No1' folder is highlighted in blue in the table.

Attribute	Yes	Date From	Date To
Attributes	<input type="checkbox"/>		
2017 Walk List Questions	<input type="checkbox"/>		
<b>2018 Canvassing Script No1</b>	<input type="checkbox"/>		
Available Media Outlet	<input type="checkbox"/>		
Campaign Roles	<input type="checkbox"/>		

Now you can begin entering the **answers (attribute items)** to the questions (attribute sub-folders), that your canvassers will be asking. *If you need to answer multiple answer options, check the box that says ‘keep this form open’.* Click **[OK]** after entering each “answer”. *My examples are below.*

The screenshot shows the TrailBlazer interface with a table of attributes and a 'Create New Attribute' dialog box. The table has columns for Attribute, Yes, Date From, Date To, and Note. The 'Do you support our candidate?' folder is expanded, showing 'No', 'Undecided', and 'Yes' attributes. The 'Undecided' attribute is selected. The dialog box is titled 'Create New Attribute' and contains the following text:

New Attribute \_\_\_\_\_

The new attribute will be created in the "Do you support our candidate?" folder.

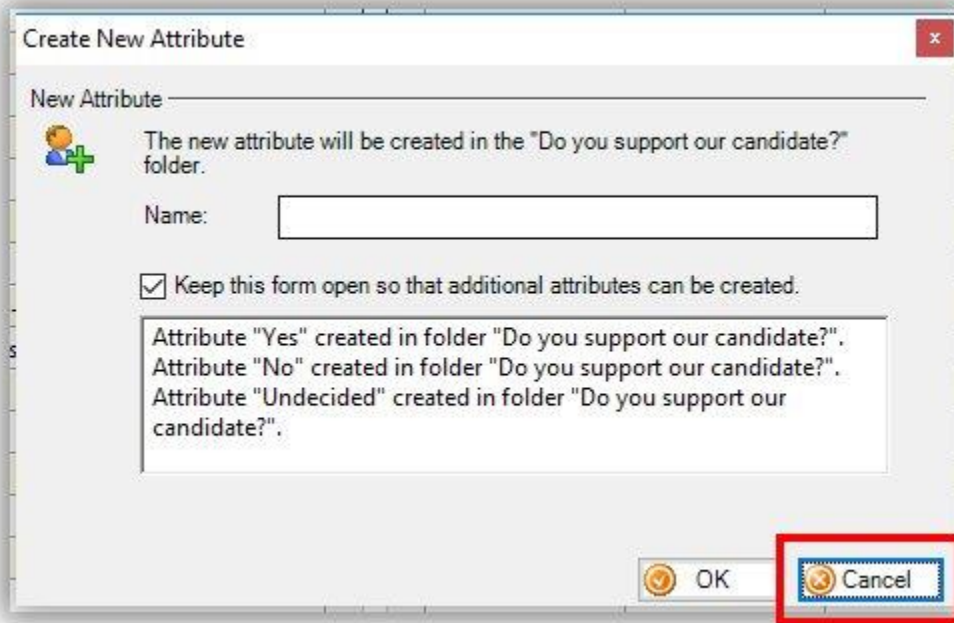
Name:

**1**  Keep this form open so that additional attributes can be created.

Attribute "Yes" created in folder "Do you support our candidate?".  
 Attribute "No" created in folder "Do you support our candidate?".  
 Attribute "Undecided" created in folder "Do you support our candidate?".

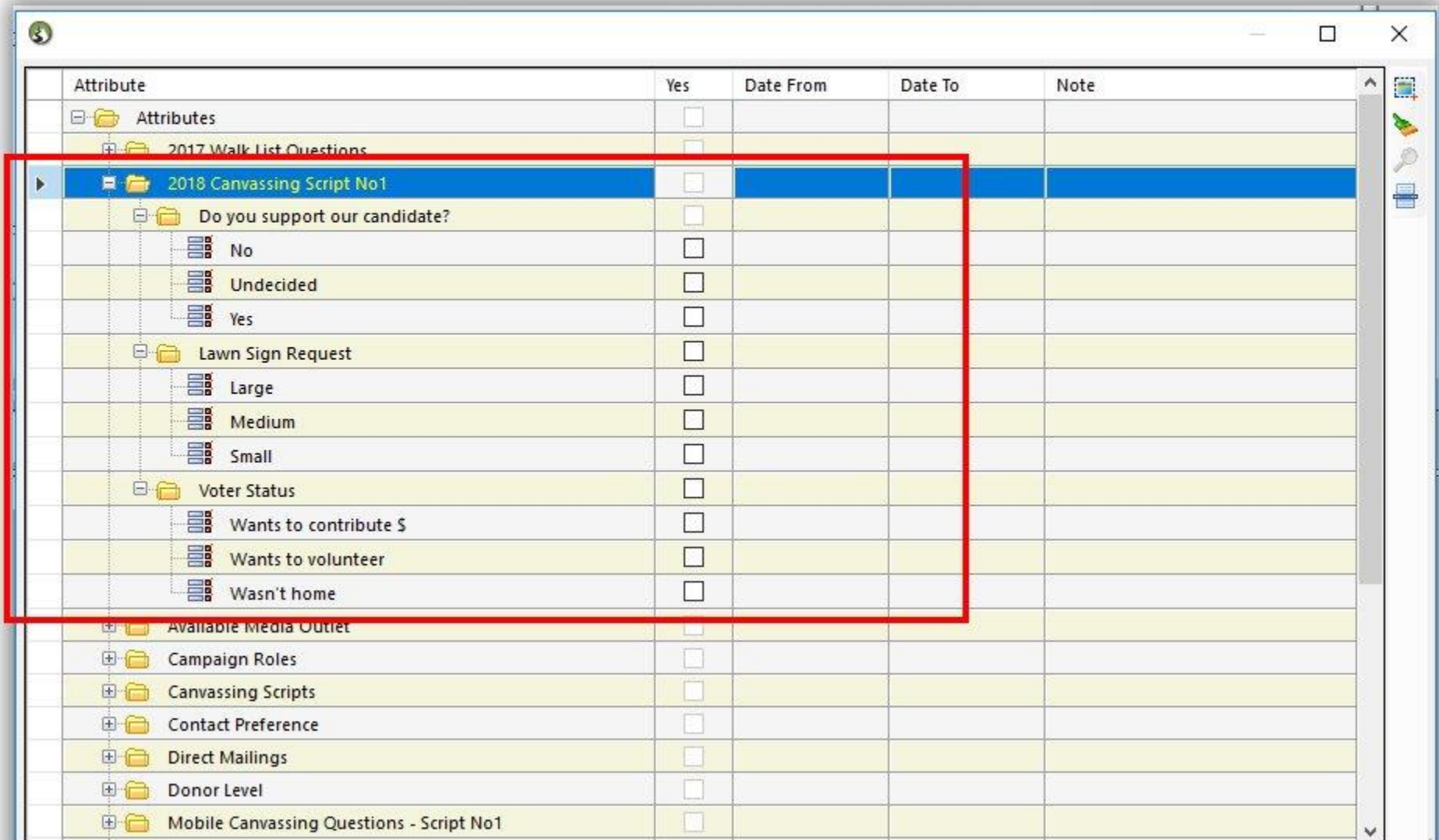
**3**

Once you're finished entering the canvassing questions for a particular question, click **[Cancel]** to close out of the expanded window.



**Repeat** the above steps until all attribute questions and answers have been entered below the primary 'canvassing script' folder. *My finished example is below.*

## Example - finished canvassing script using attribute folders / sub-folders / items.

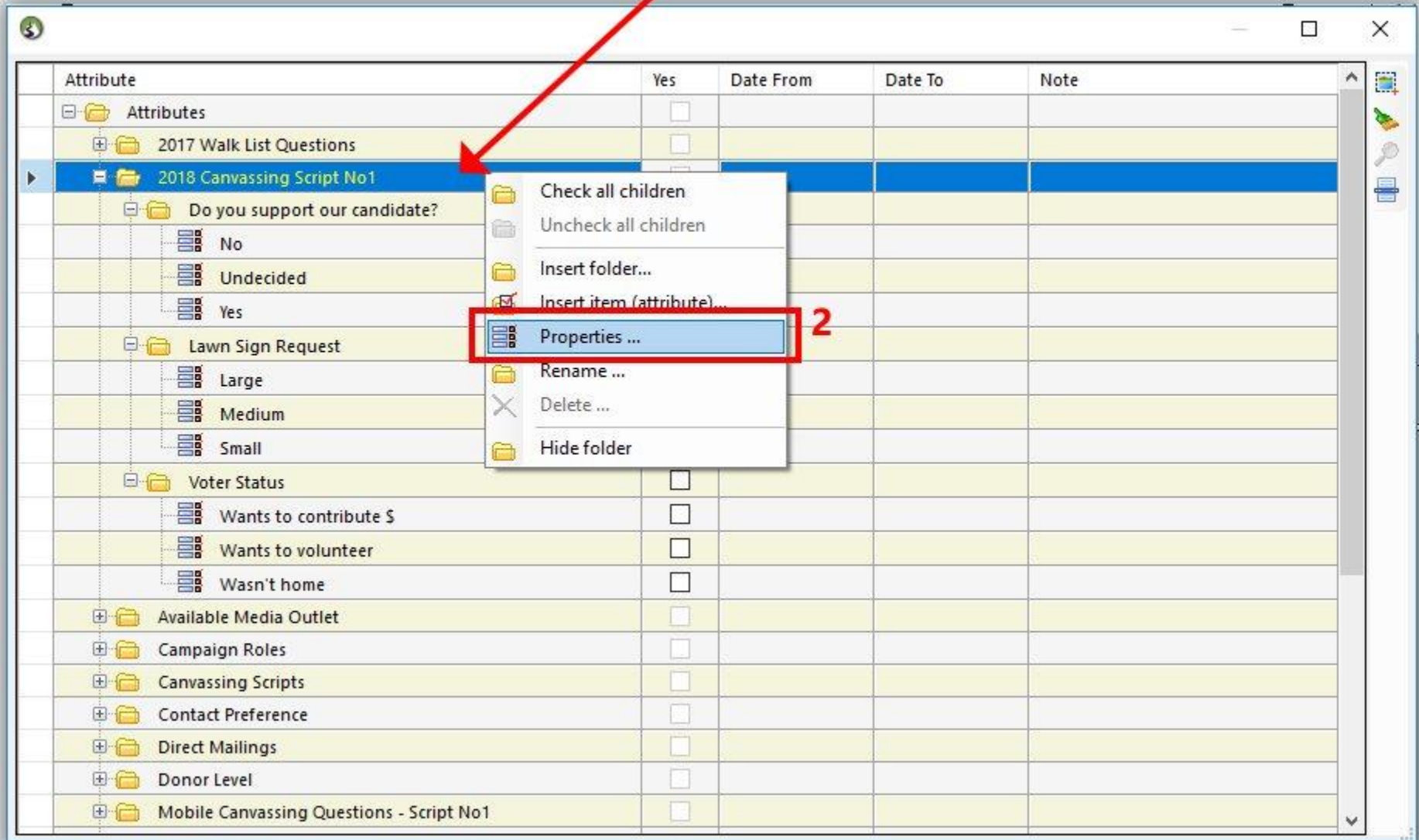


Attribute	Yes	Date From	Date To	Note
Attributes	<input type="checkbox"/>			
2017 Walk List Questions	<input type="checkbox"/>			
2018 Canvassing Script No1	<input type="checkbox"/>			
Do you support our candidate?	<input type="checkbox"/>			
No	<input type="checkbox"/>			
Undecided	<input type="checkbox"/>			
Yes	<input type="checkbox"/>			
Lawn Sign Request	<input type="checkbox"/>			
Large	<input type="checkbox"/>			
Medium	<input type="checkbox"/>			
Small	<input type="checkbox"/>			
Voter Status	<input type="checkbox"/>			
Wants to contribute \$	<input type="checkbox"/>			
Wants to volunteer	<input type="checkbox"/>			
Wasn't home	<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"/>			
Mobile Canvassing Questions - Script No1	<input type="checkbox"/>			

The final steps for creating the canvassing script is to **right-click** on the primary (parent) folder and select **Properties**.



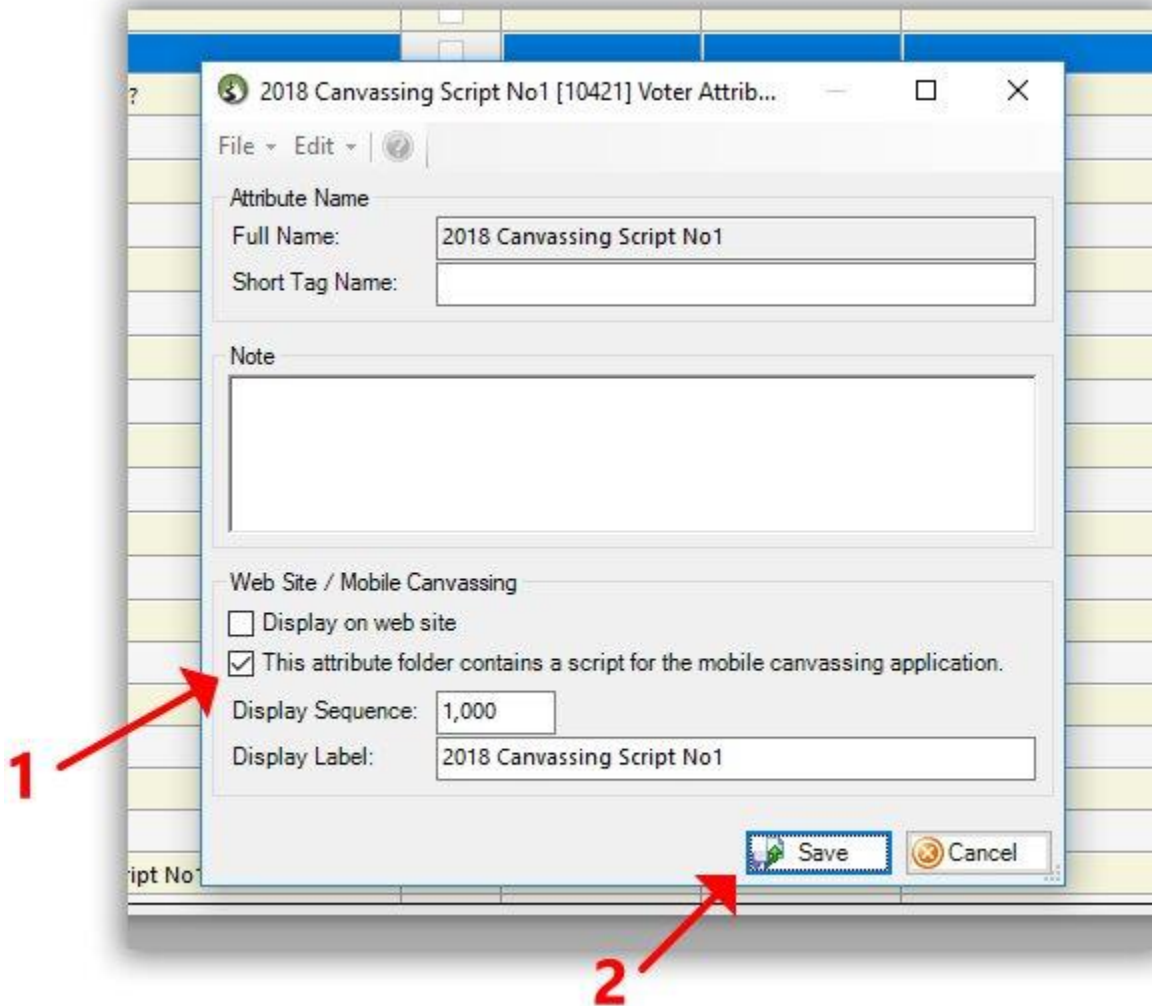
**1. right-click**



The screenshot shows the TrailBlazer software interface with a table of attributes. A right-click context menu is open over the folder '2018 Canvassing Script No1'. The 'Properties ...' option is highlighted with a red box and a red number '2'. A red arrow points to the folder with the text '1. right-click'.

Attribute	Yes	Date From	Date To	Note
Attributes	<input type="checkbox"/>			
2017 Walk List Questions	<input type="checkbox"/>			
<b>2018 Canvassing Script No1</b>				
Do you support our candidate?				
No				
Undecided				
Yes				
Lawn Sign Request				
Large				
Medium				
Small				
Voter Status	<input type="checkbox"/>			
Wants to contribute \$	<input type="checkbox"/>			
Wants to volunteer	<input type="checkbox"/>			
Wasn't home	<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"/>			
Mobile Canvassing Questions - Script No1	<input type="checkbox"/>			

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

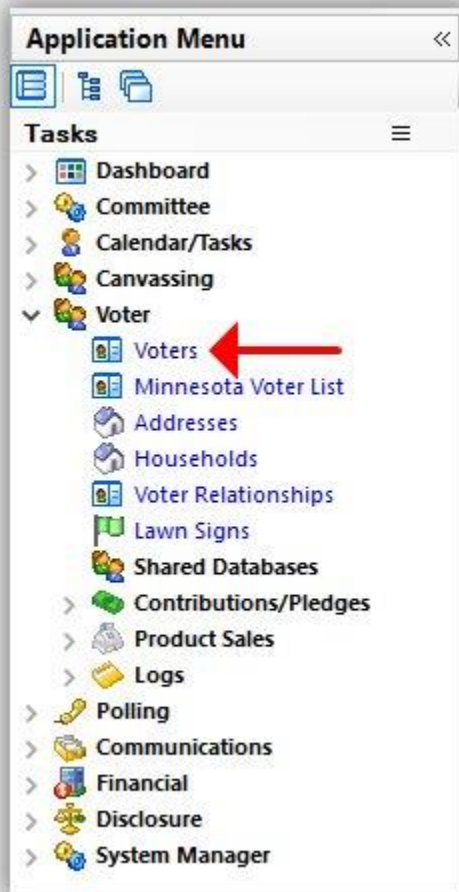


You can modify this canvassing script as much as you need in the future by adding new questions, sections, renaming items, etc.

## 2. Creating New Canvassers (DB Users with Access to the Mobile Apps)

**Important Note:** you can have as many users setup with access to your **Trail Blazer** database, and the mobile apps. It's **important** to make sure these users don't have more access than needed. This section shows how to setup a new user with only enough access to log into the mobile canvassing app, and use it to canvass voters that are assigned to them.

Navigate to the **Voters** list.



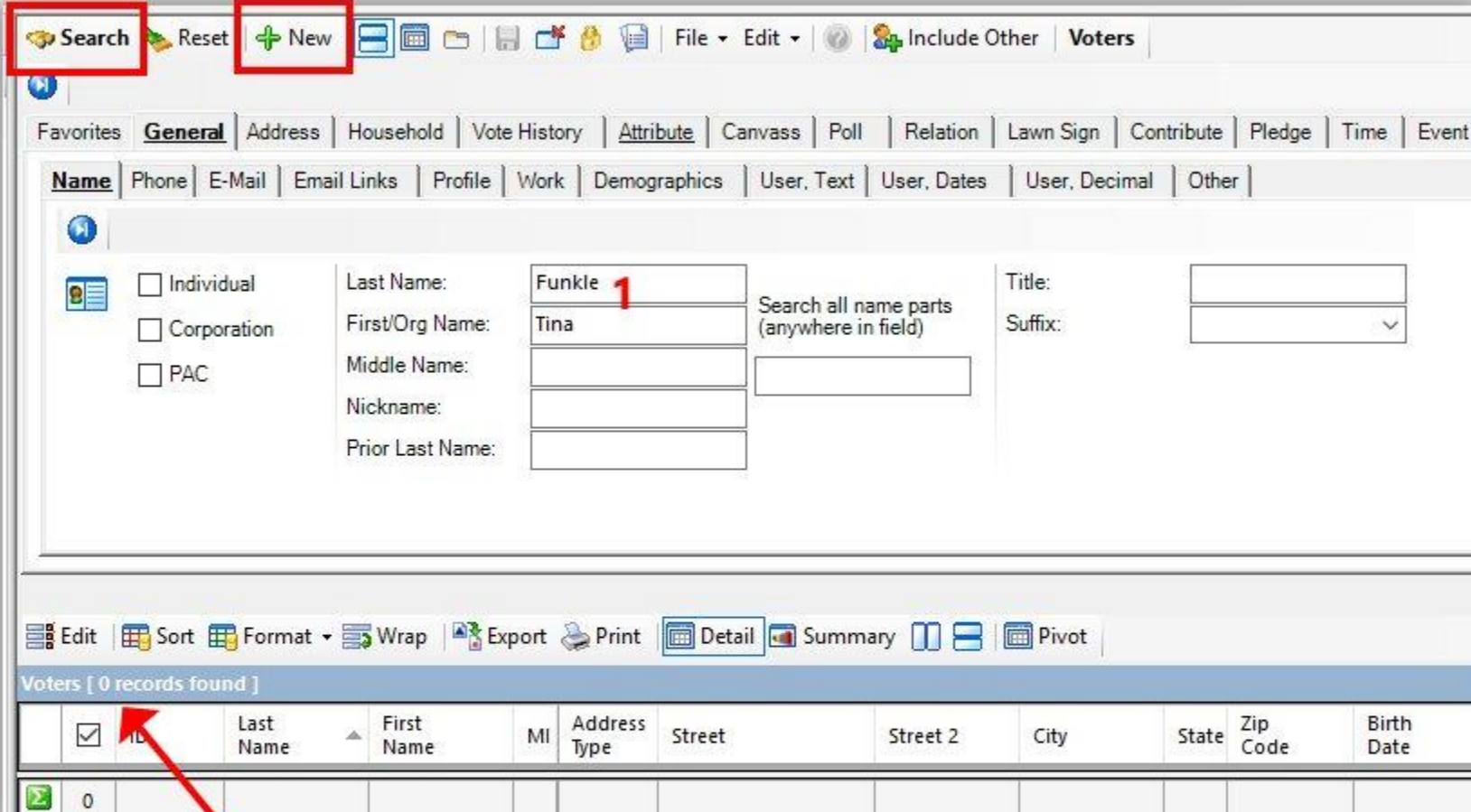
Run a search for the person you want to setup as a new user. *If they're in your database already, open their contact record card, if they aren't, click **[+ New]** at the top to create a new record. In this example I searched for someone (Tina Funkle) who wasn't in my database, and added them as a new record.*





2

3

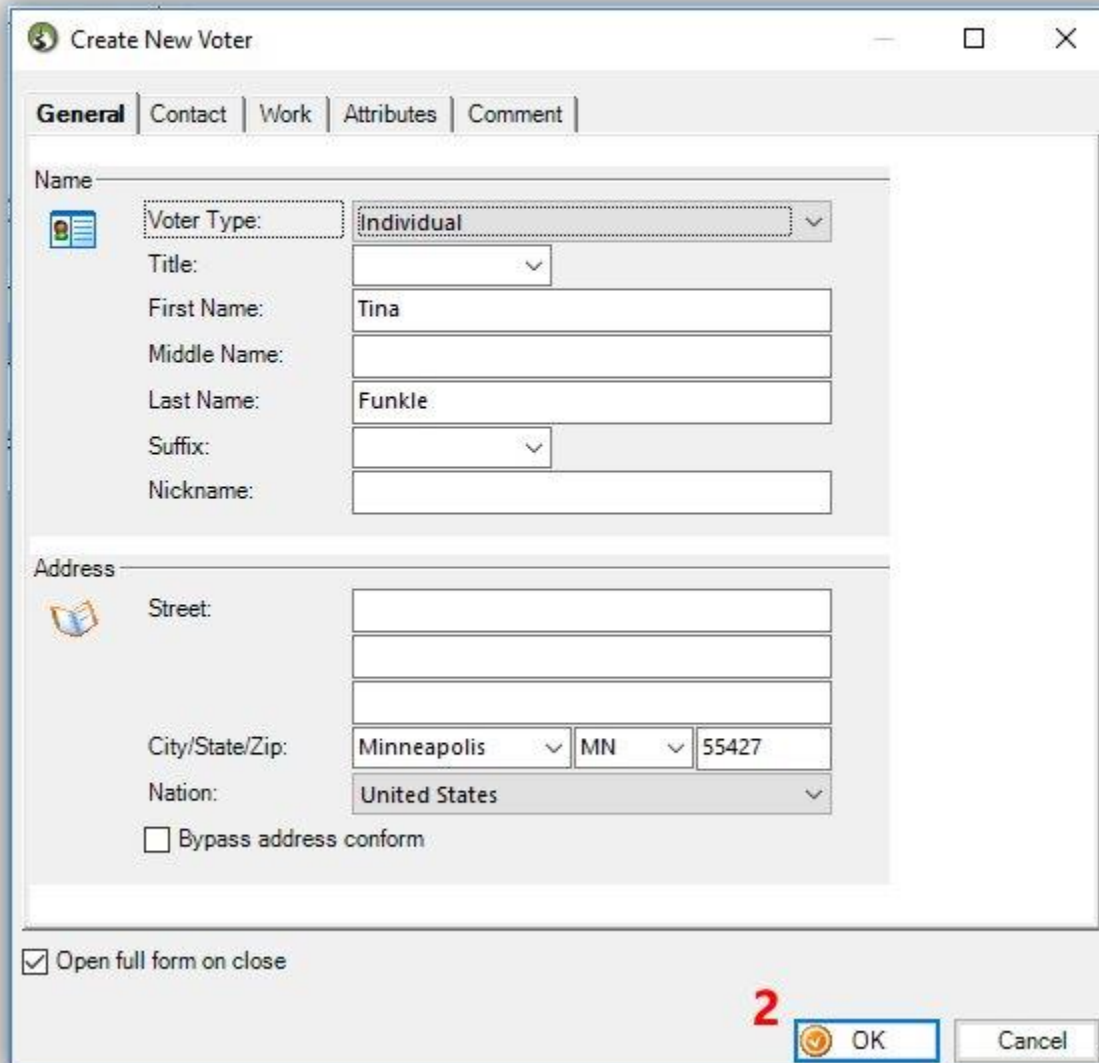


The screenshot shows the TrailBlazer software interface. At the top, there is a toolbar with buttons for 'Search' (highlighted with a red box and labeled '2'), 'Reset', and '+ New' (highlighted with a red box and labeled '3'). Below the toolbar is a menu bar with options like 'General', 'Address', 'Household', etc. The main area contains a form for creating a new record. The form has radio buttons for 'Individual', 'Corporation', and 'PAC'. The 'Last Name' field contains 'Funkle' (labeled '1'), and the 'First/Org Name' field contains 'Tina'. Below the form is another toolbar with options like 'Edit', 'Sort', 'Format', 'Wrap', 'Export', 'Print', 'Detail', 'Summary', and 'Pivot'. At the bottom, there is a table header with columns: 'ID', 'Last Name', 'First Name', 'MI', 'Address Type', 'Street', 'Street 2', 'City', 'State', 'Zip Code', and 'Birth Date'. The table shows '0 records found' and a single row with '0' in the 'ID' column. A red arrow points to the 'ID' column header.

**\*If the person isn't already in your database, add them as a new record. If they are, open up their existing record.**

If you're adding a new person to the database, fill out the relevant information and then click **[OK]**. If you're using an existing contact record, you can move on to the next step.


## 1. Fill out the information you have for the new database user.



**Create New Voter**

**General** | Contact | Work | Attributes | Comment

**Name**

 Voter Type: Individual

Title:

First Name: Tina


Middle Name:

Last Name: Funkle

Suffix:

Nickname:

**Address**

 Street:

City/State/Zip: Minneapolis MN 55427

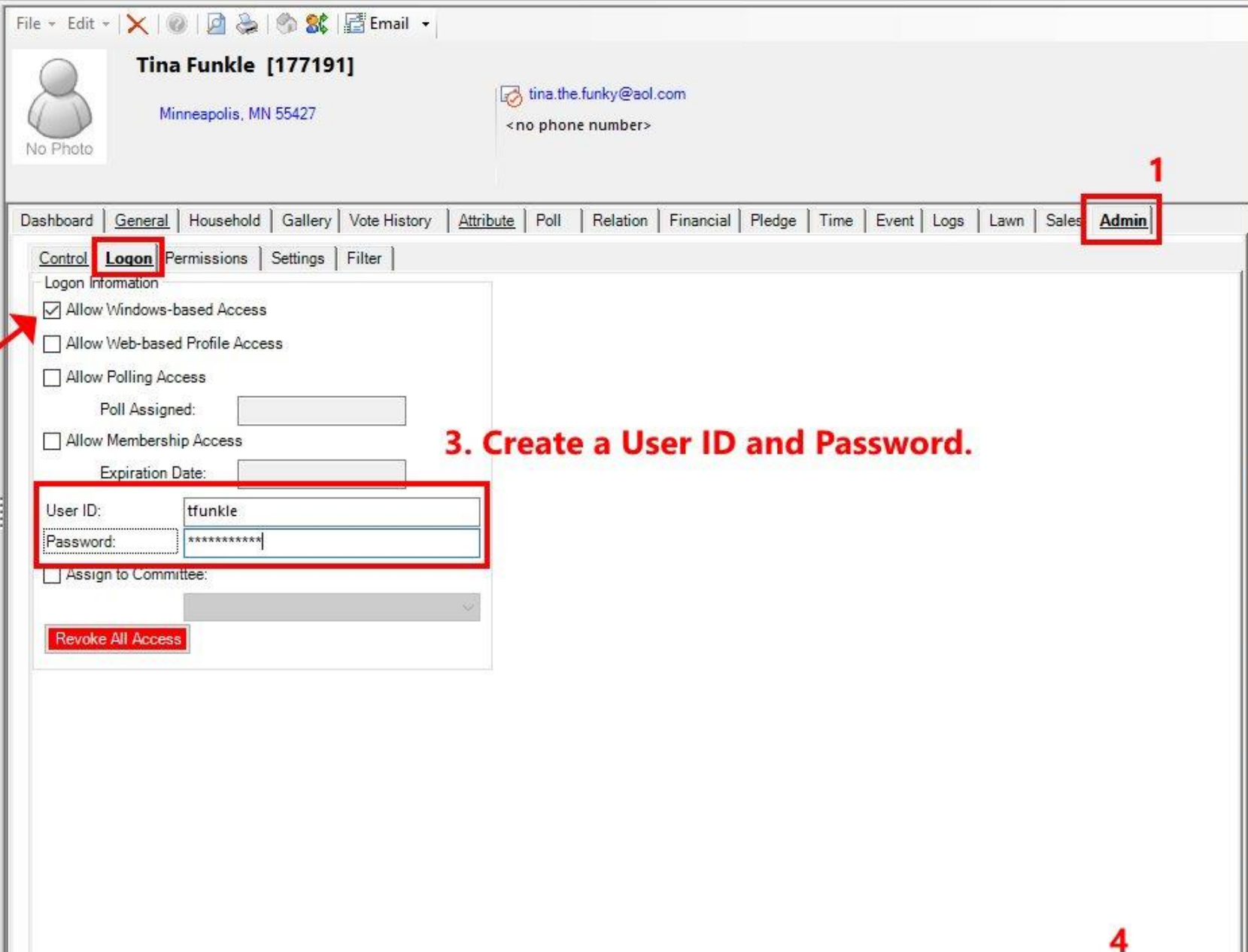
Nation: United States

Bypass address conform

Open full form on close

**2**

Navigate to the **Admin** tab > **Logon** sub-tab. Check **Allow Windows-based Access**, create a **User ID** and **Password** for the canvasser, and [**Save and Close**].



The screenshot shows the TrailBlazer user management interface for Tina Funkle. The interface includes a top navigation bar with tabs for Dashboard, General, Household, Gallery, Vote History, Attribute, Poll, Relation, Financial, Pledge, Time, Event, Logs, Lawn, Sales, and Admin. The Admin tab is highlighted with a red box and the number 1. Below the navigation bar, there are sub-tabs for Control, Logon, Permissions, Settings, and Filter. The Logon tab is highlighted with a red box and the number 2. The Logon Information section contains several checkboxes: Allow Windows-based Access (checked), Allow Web-based Profile Access, Allow Polling Access, and Allow Membership Access. There are also input fields for Poll Assigned and Expiration Date. The User ID field contains 'tfunkle' and the Password field contains '\*\*\*\*\*', both highlighted with a red box and the number 3. Below the password field is a checkbox for Assign to Committee and a dropdown menu. At the bottom of the section is a red button labeled 'Revoke All Access'. The number 4 is located at the bottom right of the page.

1

2

3. Create a User ID and Password.

4

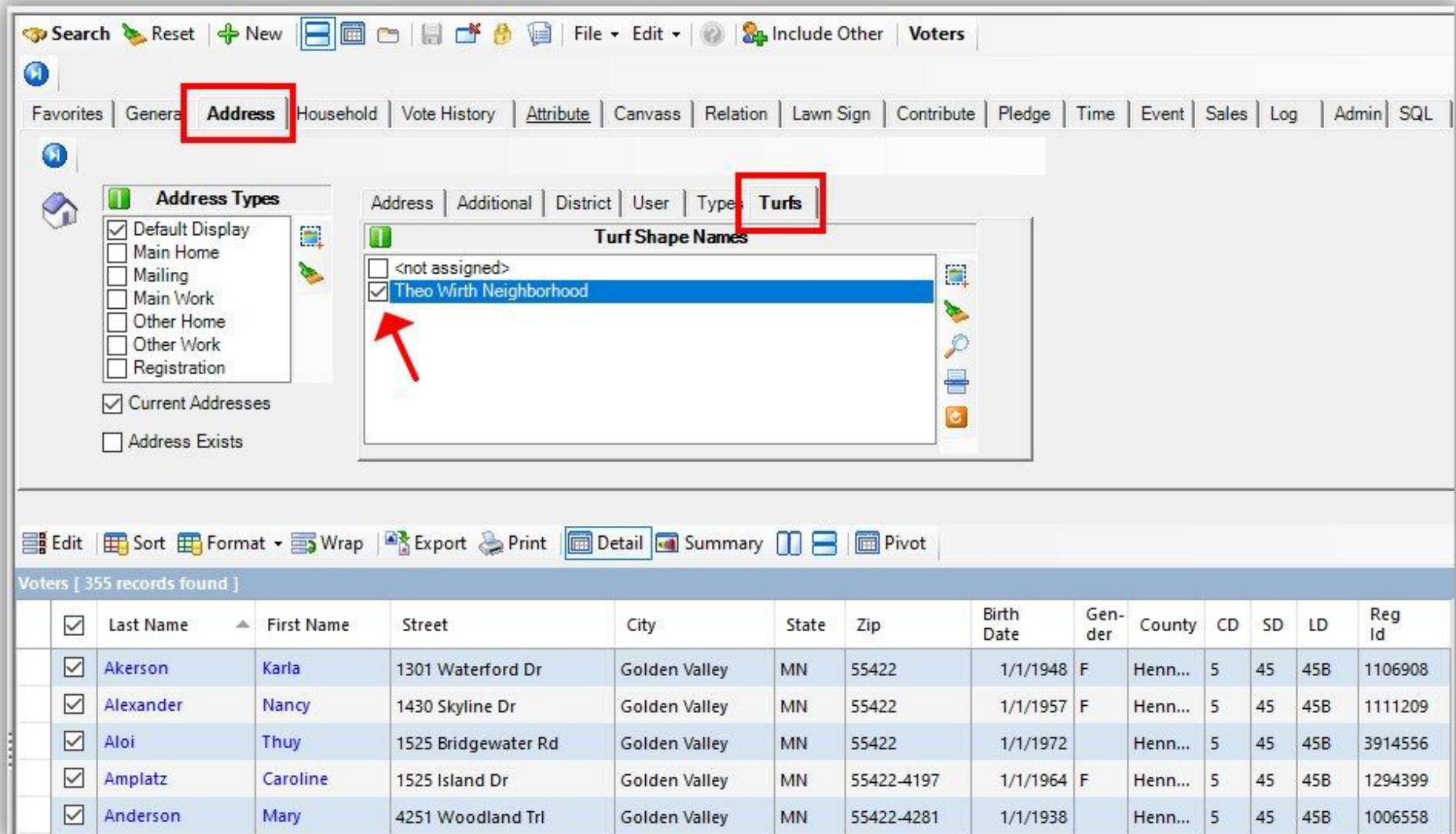
That's all that's required to give a user **limited access** for using the mobile app for canvassing. *You'll need to restart Trail Blazer in order for the new user to display as an option when assigning your canvassing lists.*

### 3. Build a Targeted List of Voters/Contacts to Canvass and Assign the List (and Script) to your Canvassers

As mentioned at the very beginning of this article, you have the option to build a canvassing list using our **turf-cutting (mapping)** tools *if* you've had your address data geocoded (which is an [additional service](#)). Watch [this video](#) to learn how. You can then pull up that list inside of the desktop CRM after creating it with Trail Blazer IQ, ex:



**Example of a targeted voter list for canvassing that was first created using the Trail Blazer IQ turf-cutting / mapping tool.**

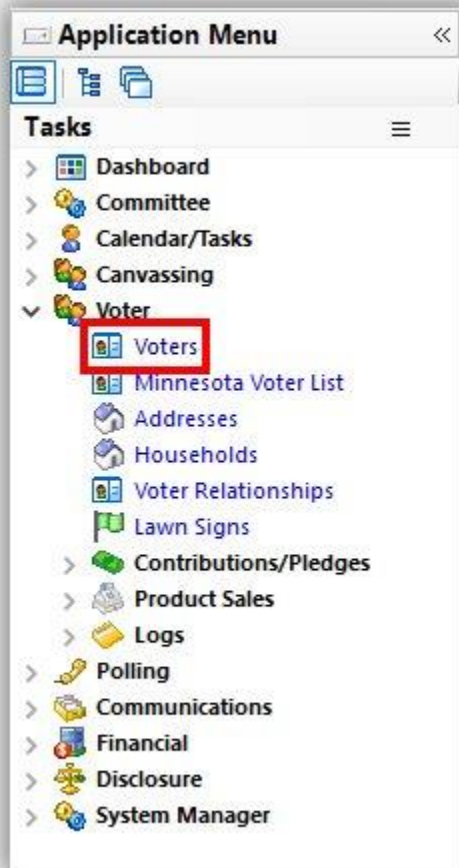


The screenshot shows the TrailBlazer software interface. The top menu bar includes options like Search, Reset, New, File, Edit, and Include Other. Below the menu bar, there are several tabs: Favorites, General, **Address** (highlighted with a red box), Household, Vote History, Attribute, Canvass, Relation, Lawn Sign, Contribute, Pledge, Time, Event, Sales, Log, Admin, and SQL. On the left side, there is a panel for 'Address Types' with a list of checkboxes: Default Display (checked), Main Home, Mailing, Main Work, Other Home, Other Work, Registration, Current Addresses (checked), and Address Exists. In the center, there is a 'Turf Shape Names' window (highlighted with a red box) containing a list of turfs: '<not assigned>' and 'Theo Wirth Neighborhood' (checked and highlighted in blue, with a red arrow pointing to it). Below the turf selection, there is a toolbar with options like Edit, Sort, Format, Wrap, Export, Print, Detail, Summary, and Pivot. At the bottom, a table displays a list of voters with 355 records found. The table has columns for Last Name, First Name, Street, City, State, Zip, Birth Date, Gender, County, CD, SD, LD, and Reg Id.

<input checked="" type="checkbox"/>	Last Name	First Name	Street	City	State	Zip	Birth Date	Gender	County	CD	SD	LD	Reg Id
<input checked="" type="checkbox"/>	Akerson	Karla	1301 Waterford Dr	Golden Valley	MN	55422	1/1/1948	F	Henn...	5	45	45B	1106908
<input checked="" type="checkbox"/>	Alexander	Nancy	1430 Skyline Dr	Golden Valley	MN	55422	1/1/1957	F	Henn...	5	45	45B	1111209
<input checked="" type="checkbox"/>	Aloi	Thuy	1525 Bridgewater Rd	Golden Valley	MN	55422	1/1/1972		Henn...	5	45	45B	3914556
<input checked="" type="checkbox"/>	Amplatz	Caroline	1525 Island Dr	Golden Valley	MN	55422-4197	1/1/1964	F	Henn...	5	45	45B	1294399
<input checked="" type="checkbox"/>	Anderson	Mary	4251 Woodland Trl	Golden Valley	MN	55422-4281	1/1/1938		Henn...	5	45	45B	1006558

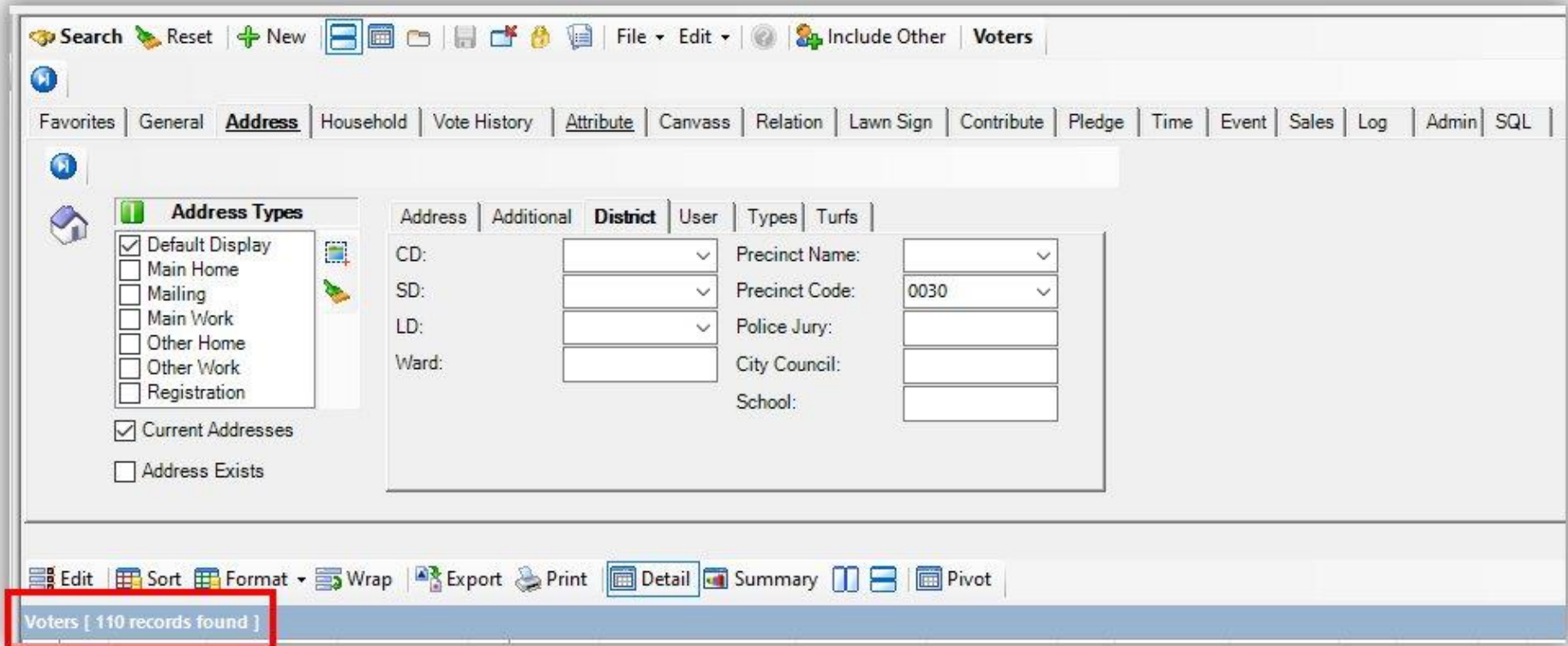
Otherwise, this section shows how to build the canvassing list using the voter/contact data that's **already** in of your **Trail Blazer** database. **Both options** are good and serve their own purpose. Sometimes you may even want to use a combination of both tools to create a targeted list.

Navigate to your **Voters (Contacts)** List.



Build and run your **targeted search query** for the list of voters that you want to canvass. *In my example I searched for all voters in precinct 30, which produced 110 results.*

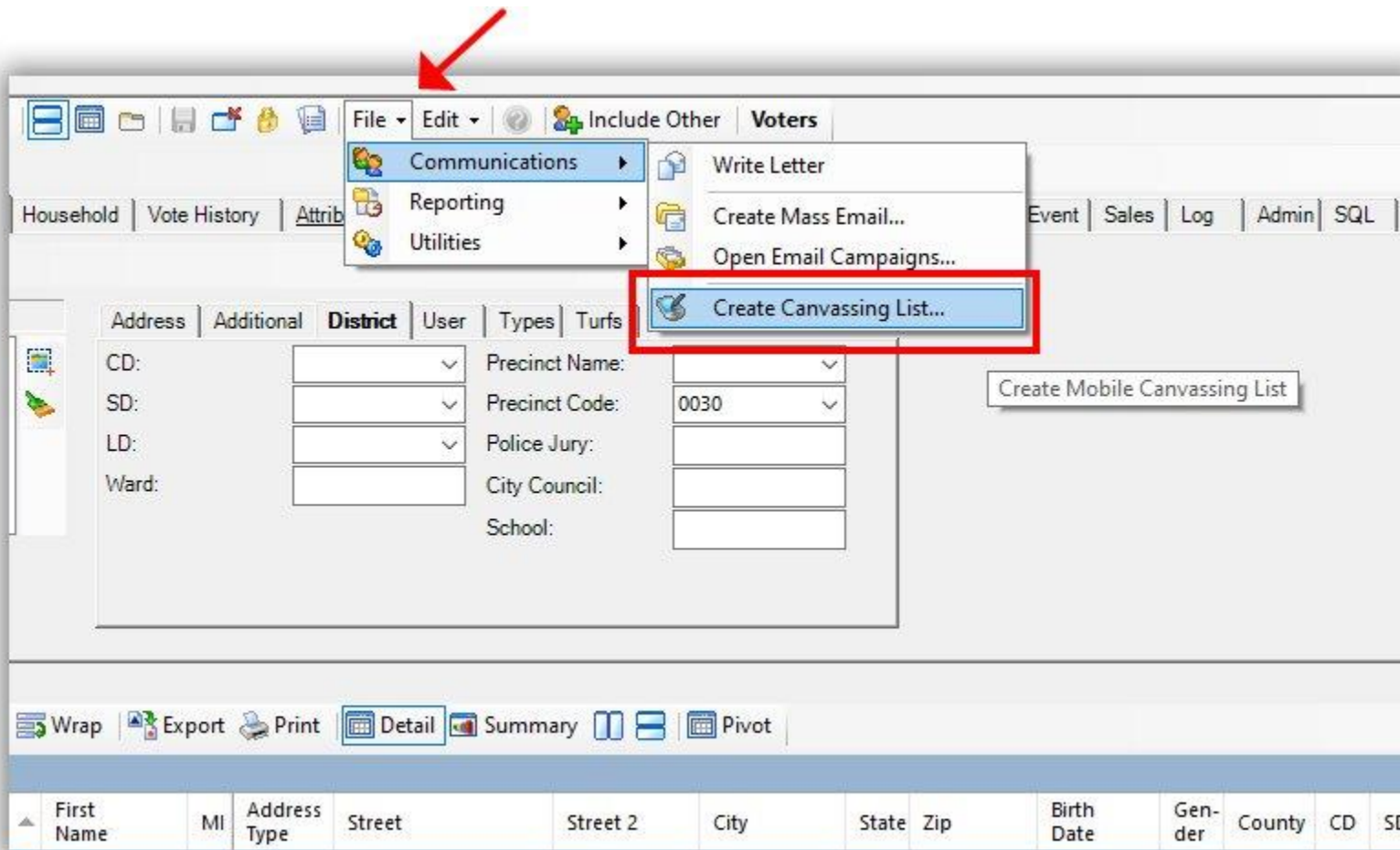
## Build and run your targeted search query for the list voters that you want to canvass.



The screenshot shows the TrailBlazer software interface. At the top, there is a search bar with a magnifying glass icon, a 'Reset' button, a '+ New' button, and a 'Voters' tab. Below this is a navigation menu with tabs for 'Favorites', 'General', 'Address', 'Household', 'Vote History', 'Attribute', 'Canvass', 'Relation', 'Lawn Sign', 'Contribute', 'Pledge', 'Time', 'Event', 'Sales', 'Log', 'Admin', and 'SQL'. The 'Address' tab is selected. On the left, there is a 'Address Types' section with a list of checkboxes: 'Default Display' (checked), 'Main Home', 'Mailing', 'Main Work', 'Other Home', 'Other Work', 'Registration', 'Current Addresses' (checked), and 'Address Exists'. The main area contains a form with fields for 'CD:', 'SD:', 'LD:', 'Ward:', 'District' (dropdown), 'User' (dropdown), 'Precinct Name:' (dropdown), 'Precinct Code:' (dropdown with '0030' selected), 'Police Jury:', 'City Council:', and 'School:'. At the bottom, there is a toolbar with icons for 'Edit', 'Sort', 'Format', 'Wrap', 'Export', 'Print', 'Detail', 'Summary', and 'Pivot'. A blue status bar at the very bottom displays 'Voters [ 110 records found ]', which is highlighted with a red box.

## results of my example

Once you have the list of voters generated, click **File > Communications > Create Canvassing List...**



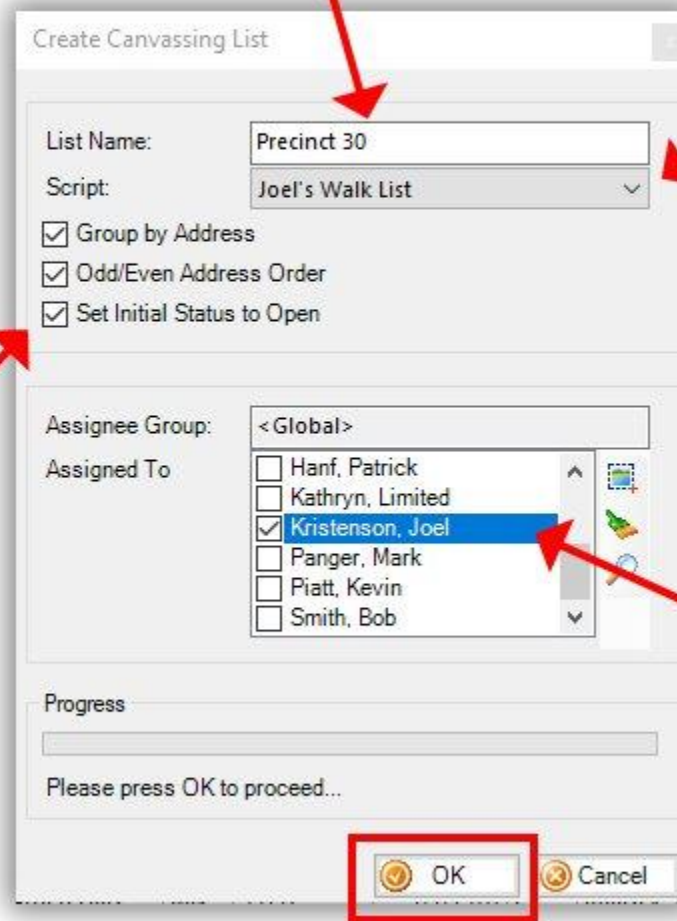
Give your Canvassing List a **name**, select the **Script** to use (*creating a script is covered in section #1*), **set the status to Open** (*if you want the list to be available immediately within the mobile app*), and select which **user(s)** to assign it to. *My example is below.*





**create a name for the canvassing list**

**select which script to use**



**set the status to open \*if you want the list to be available immediately on the mobile app**

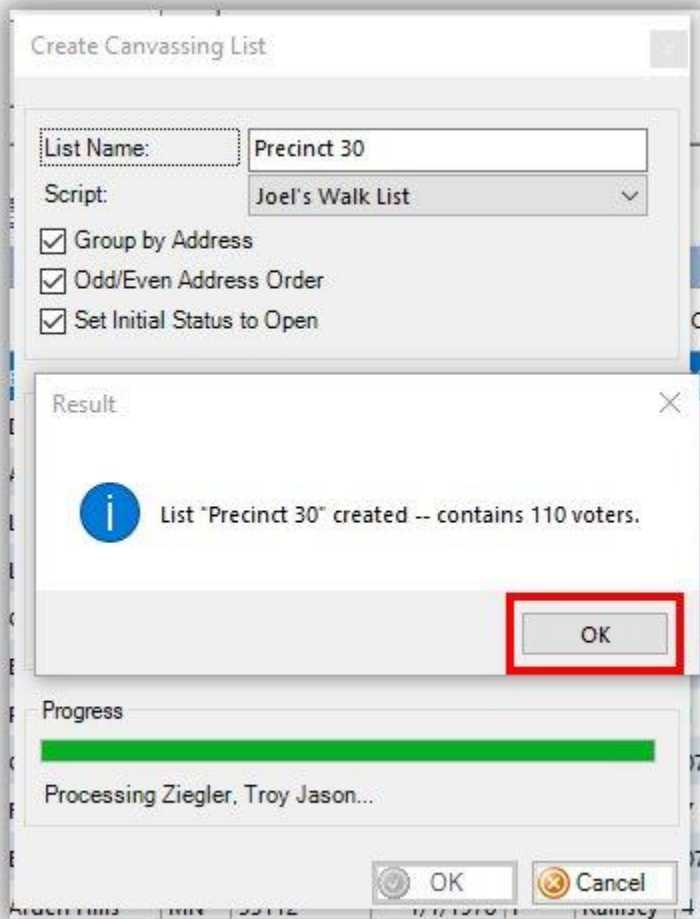
**select which user(s) to assign the list to**

**click [OK] when finished**

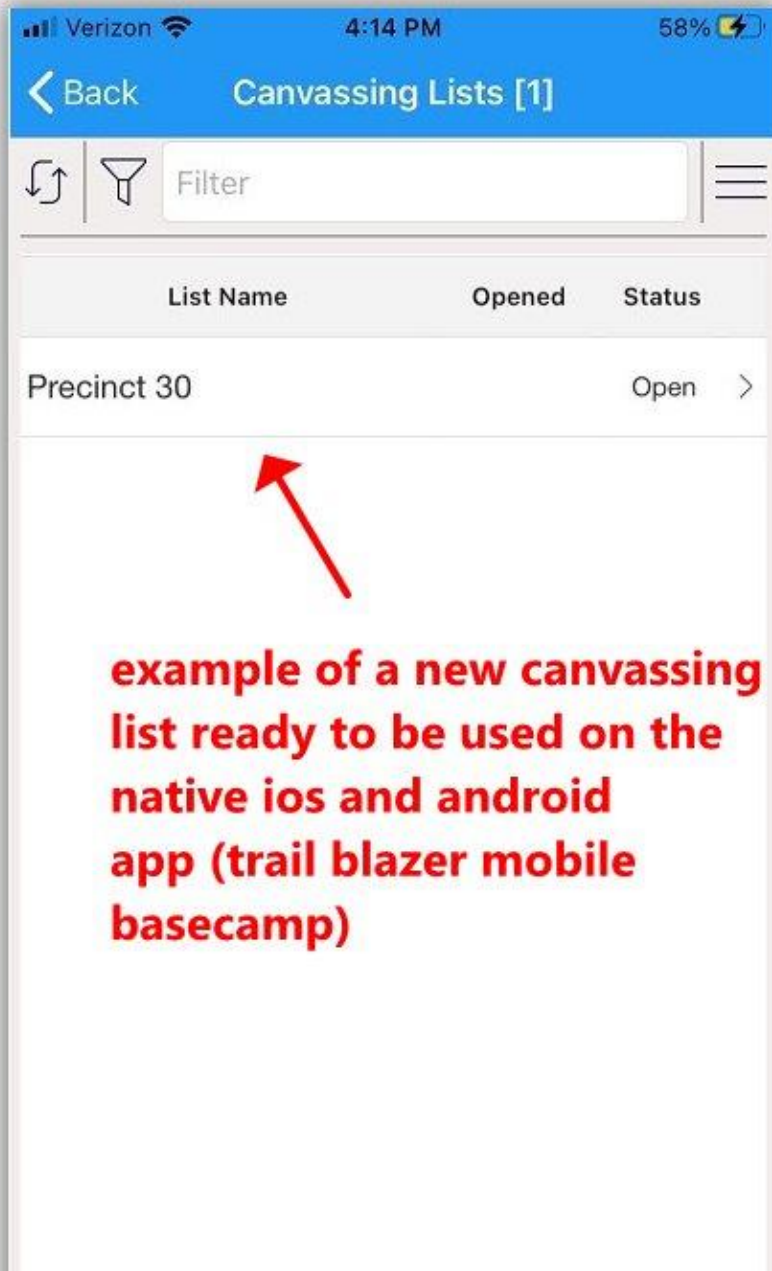


After configuring your settings you'll click **[OK]** to generate the canvassing list, and it will be **assigned** to the user(s) selected.

The system will prompt you with a popup after it's finished. Click **[OK]** to finish.



The user(s) that you assigned the list to can now access it by **logging** into the **Trail Blazer Mobile Basecamp** app on their iOS or Android device, ex:



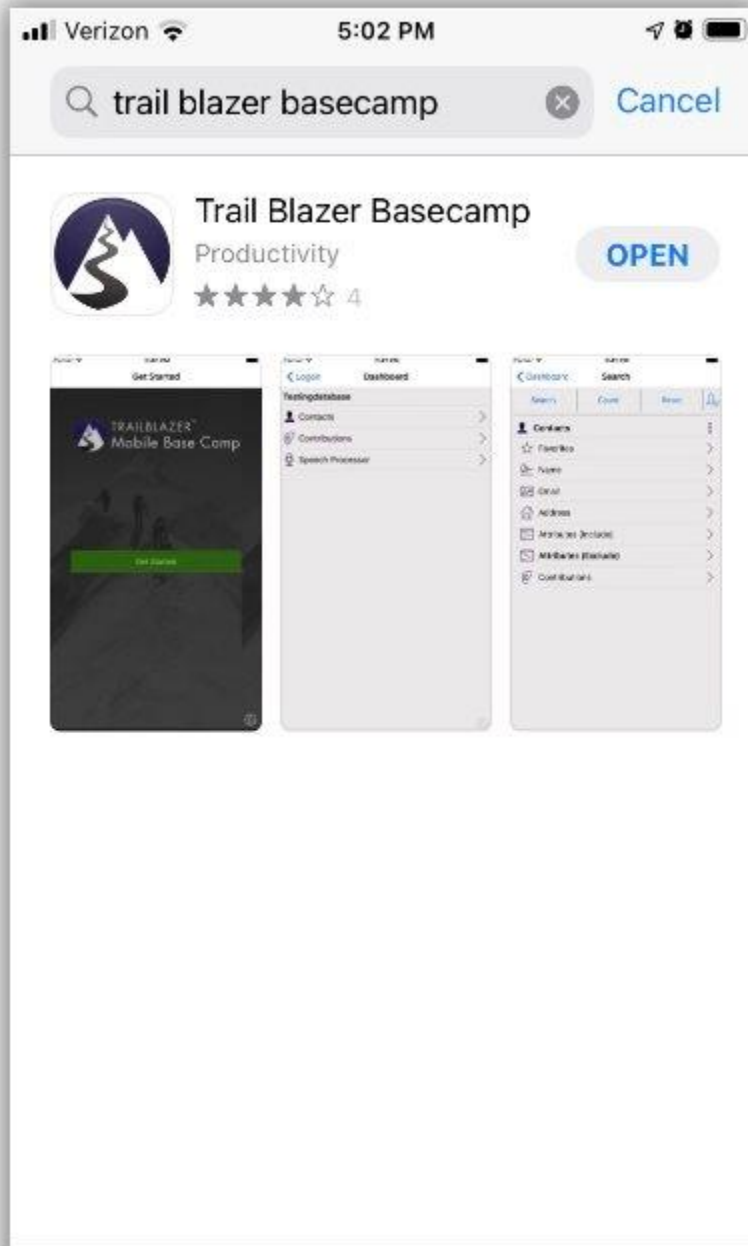
The next section walks through the steps on how to **login and use** the mobile canvassing app.

### 4. Using the Trail Blazer Basecamp App to Canvass Voters/Households

Download the **Trail Blazer Basecamp** app:

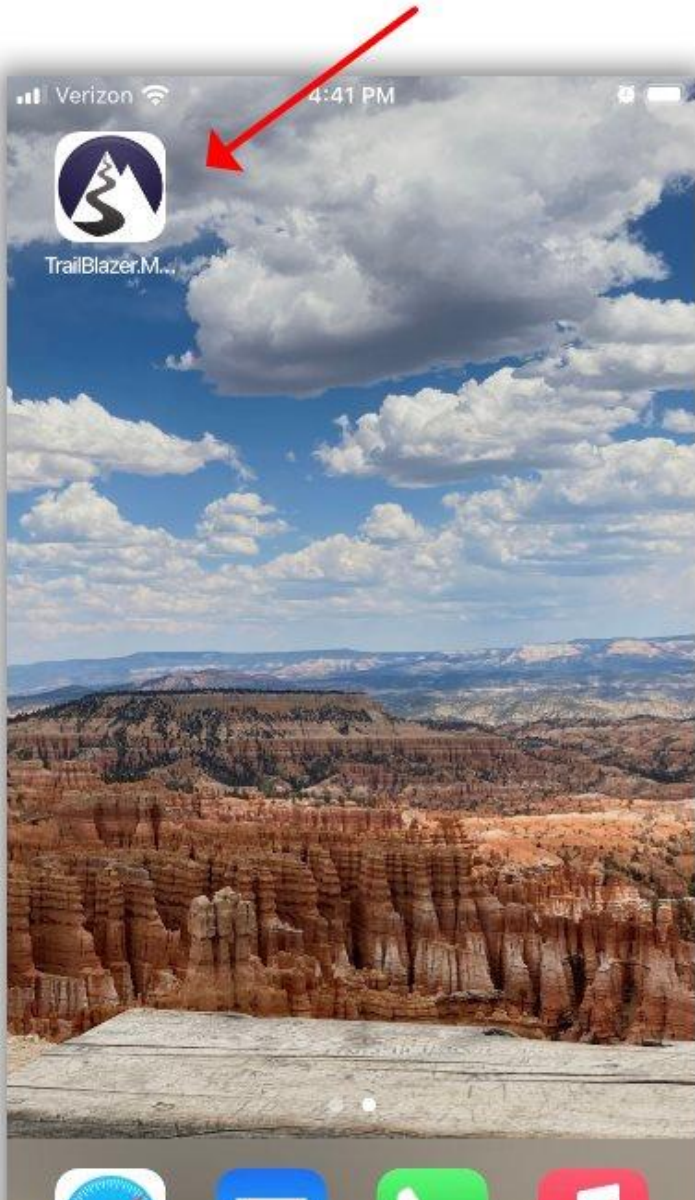
- iOS: <https://apps.apple.com/us/app/trail-blazer-basecamp/id1219460381>
- Android: <https://play.google.com/store/apps/details?id=com.trailblz.basecamp>

*Example* of how the app will appear on the **App Store** (in my screenshot the app has already been downloaded / installed):



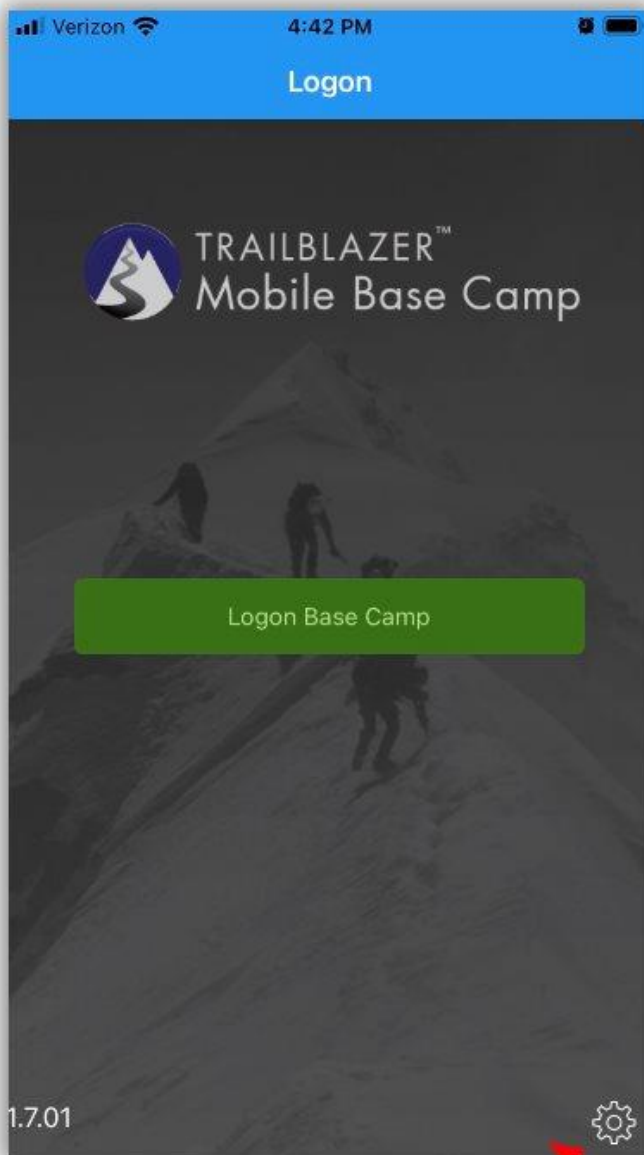
Once the app is downloaded and installed, you can **launch it** by tapping on the app icon from the **home screen** of your device. *For this example I will be using the iOS version on an iPhone.*

**Tap on the app icon to launch it.**





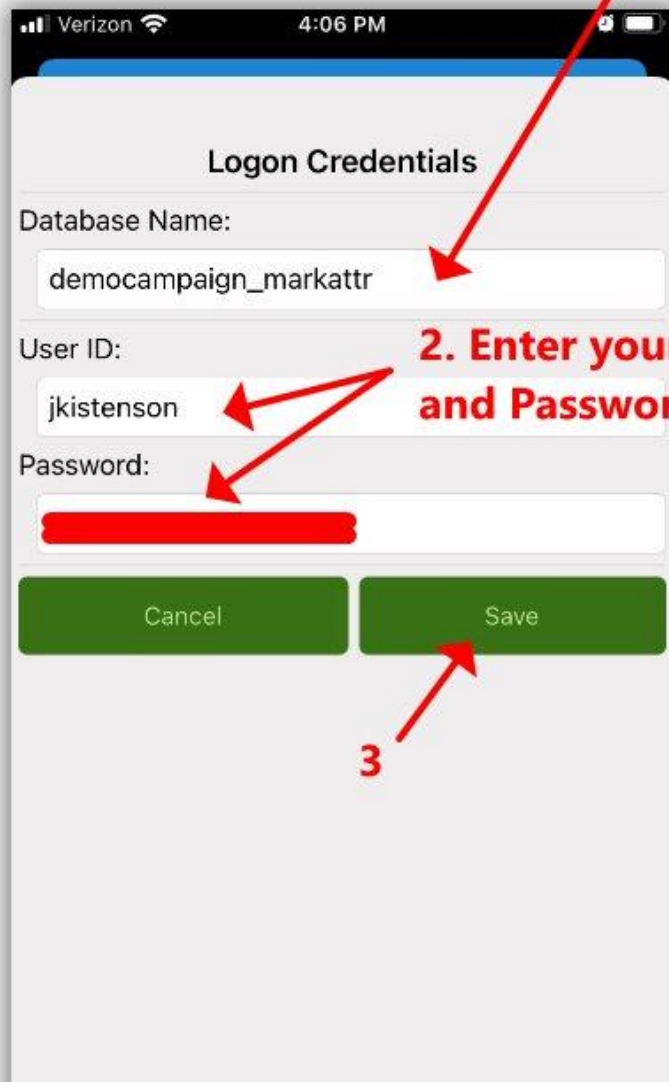
The **first** time that you login you'll need to tap on the **settings / gear** icon in the **lower-right** in order to enter your **Database Name**.



LEDGE BASE [www.trailblz.com/kb](http://www.trailblz.com/kb)

On the **Logon Credentials** page, enter your **Database Name** (if you don't know it you will need to contact your database Admin or Tech Support), and then enter your **User ID** and **Password**. Tap **Save** once complete. *My example is below.*

**1. Enter your Database Name. If you don't have this, you will need to contact your database admin or Trail Blazer tech support.**



Verizon 4:06 PM

**Logon Credentials**

Database Name:  
democampaign\_markattr

User ID:  
jkistenson

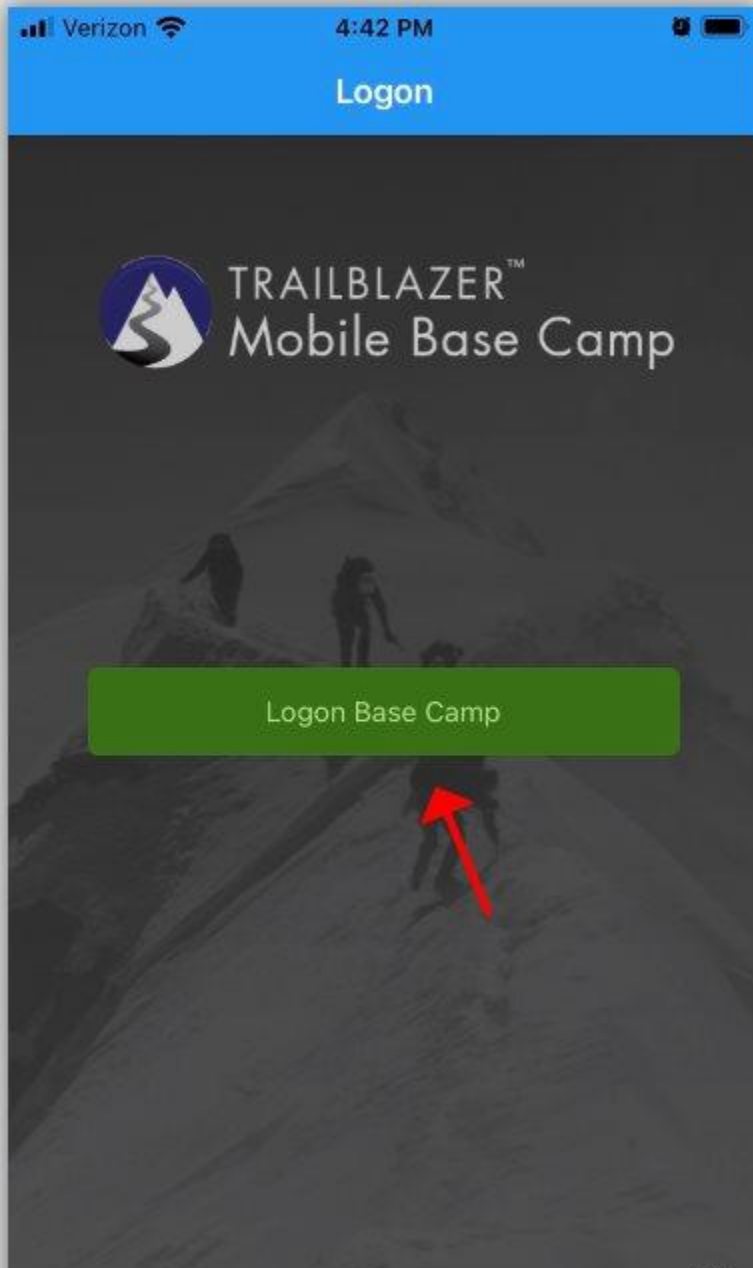
Password:  
[REDACTED]

Cancel Save

**2. Enter your User ID and Password.**

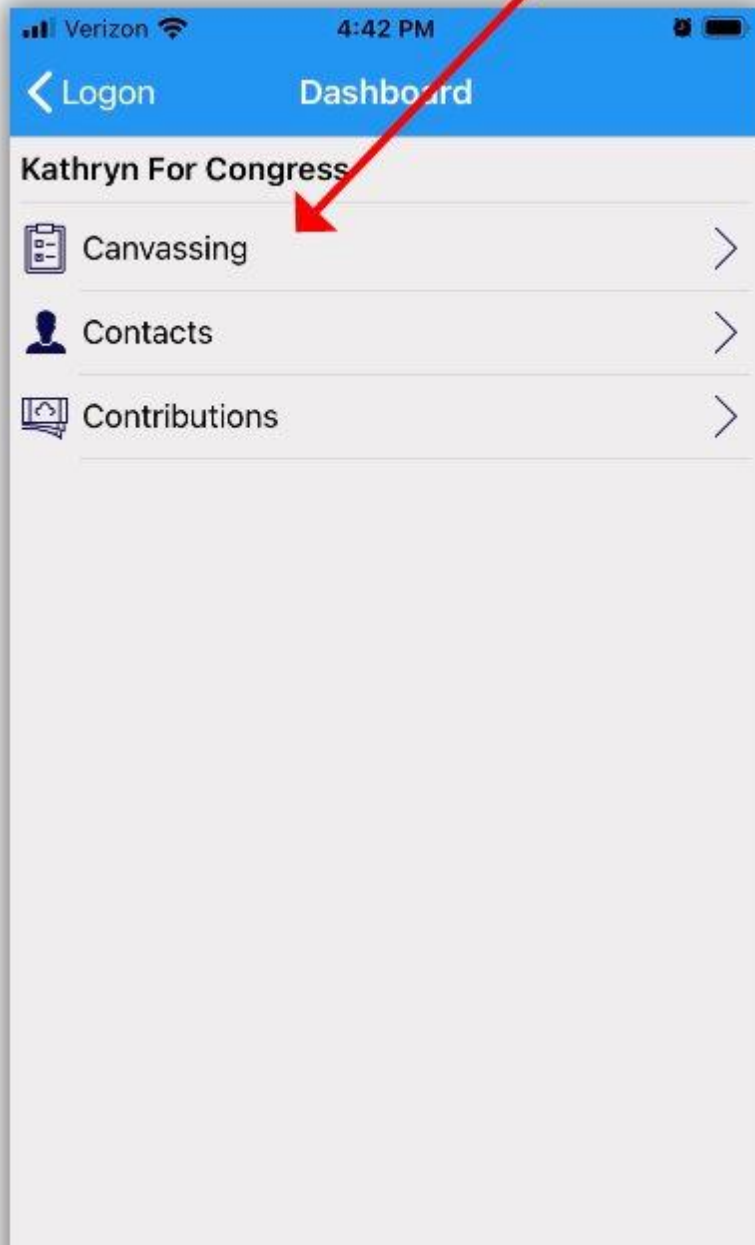
**3**

This will bring you back to the main login screen. Tap on the **Logon Base Camp** button.



This will bring you the **Dashboard** screen. Tap on **Canvassing**.



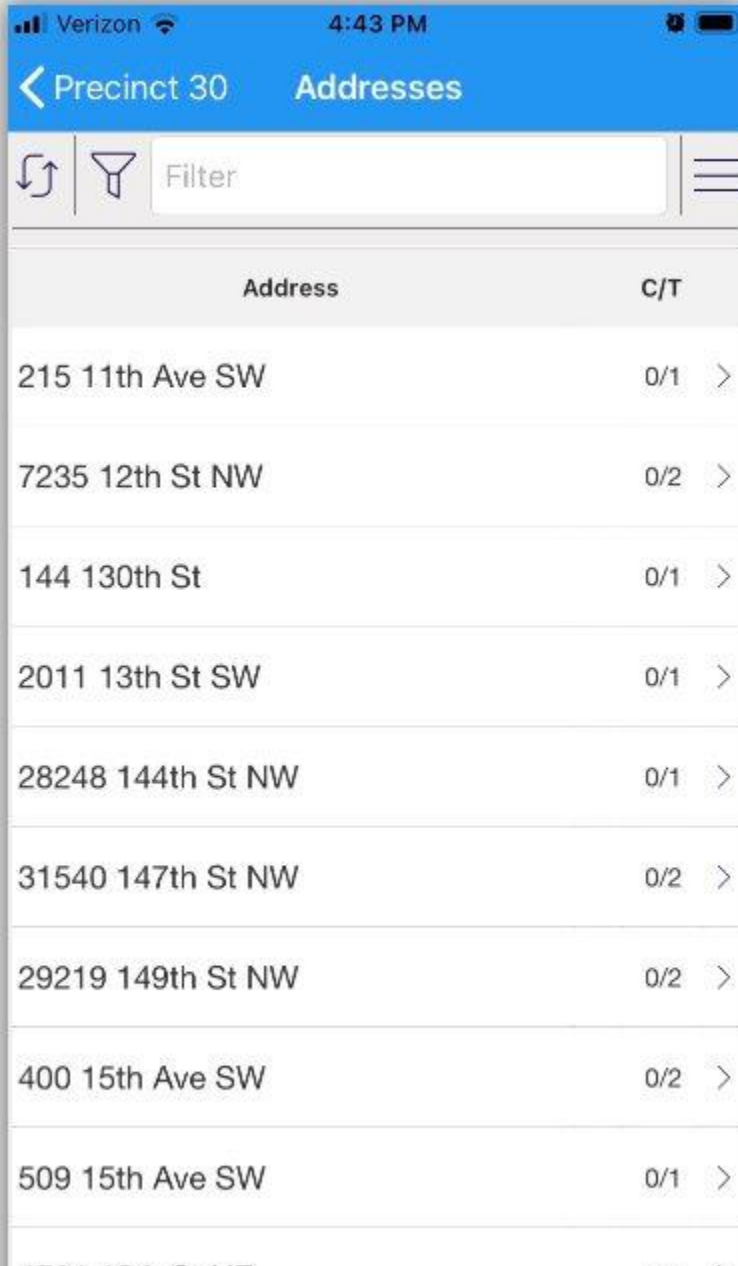


Select if you will be canvassing **online (default)** or **offline** (typically used in an area with spotty cell service or to save battery life). Then tap on the **Addresses** button.



**1. Select if you will be canvassing online or offline.**

This will bring you to the full list of households / addresses that are part of the assigned canvassing list.

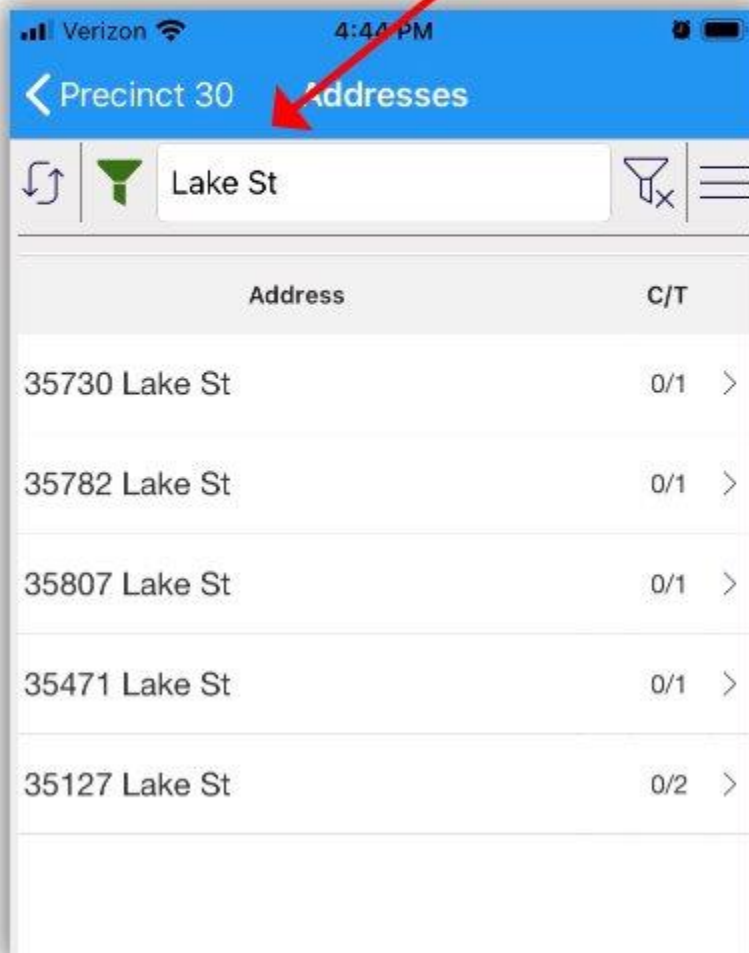


The screenshot shows a mobile application interface for managing a canvassing list. At the top, the status bar shows 'Verizon' and '4:43 PM'. Below that, a blue header bar contains a back arrow, 'Precinct 30', and 'Addresses'. A toolbar below the header includes a refresh icon, a filter icon, a search box labeled 'Filter', and a menu icon. The main content is a table with two columns: 'Address' and 'C/T'. Each row represents an address with its corresponding count and a right-pointing chevron.

Address	C/T
215 11th Ave SW	0/1 >
7235 12th St NW	0/2 >
144 130th St	0/1 >
2011 13th St SW	0/1 >
28248 144th St NW	0/1 >
31540 147th St NW	0/2 >
29219 149th St NW	0/2 >
400 15th Ave SW	0/2 >
509 15th Ave SW	0/1 >

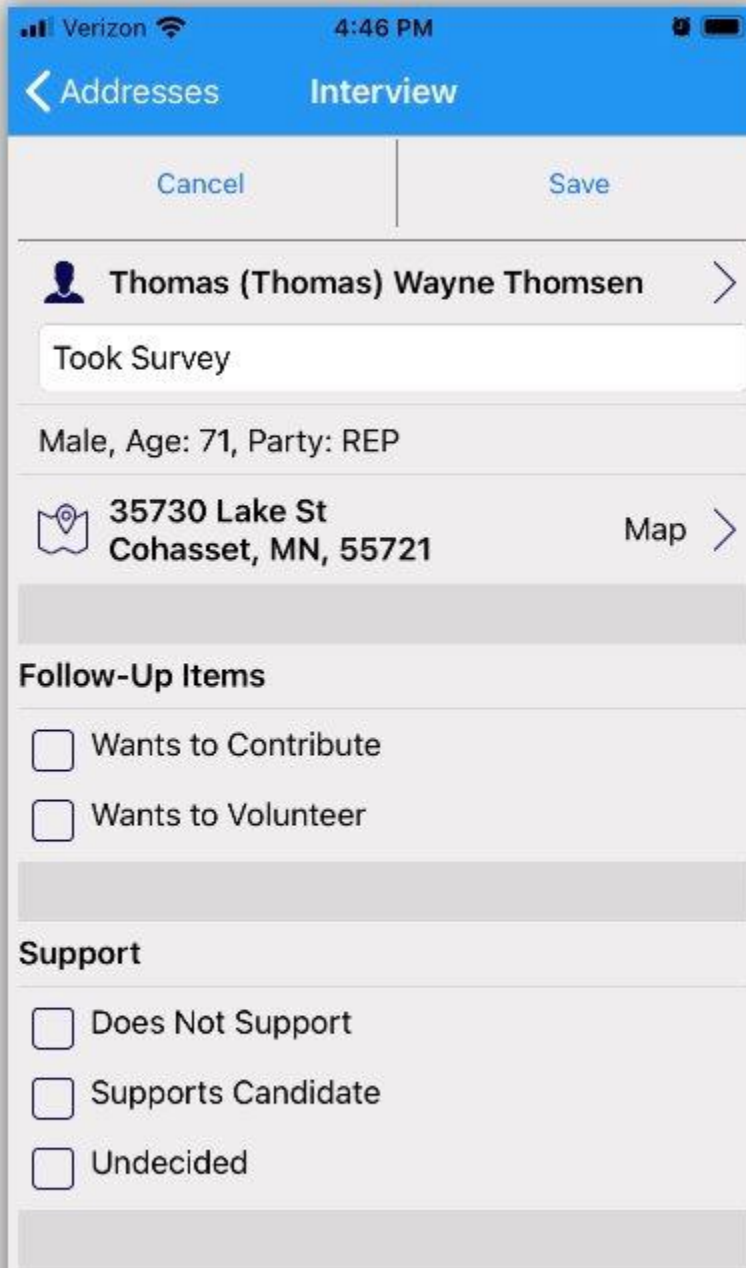
You can type in an address at the top, or a **partial address** (such as a **street name**). This will filter the list to display the results that match your search criteria. *In my example I searched by “Lake Street” which displayed 5 households to canvass.*

**Filter the address list by things like: house number,  
street name, or partial street name.**






**Tap** on a **specific address** in the list to open up that household to begin canvassing. *In my example I opened the household for “Thomas”.*

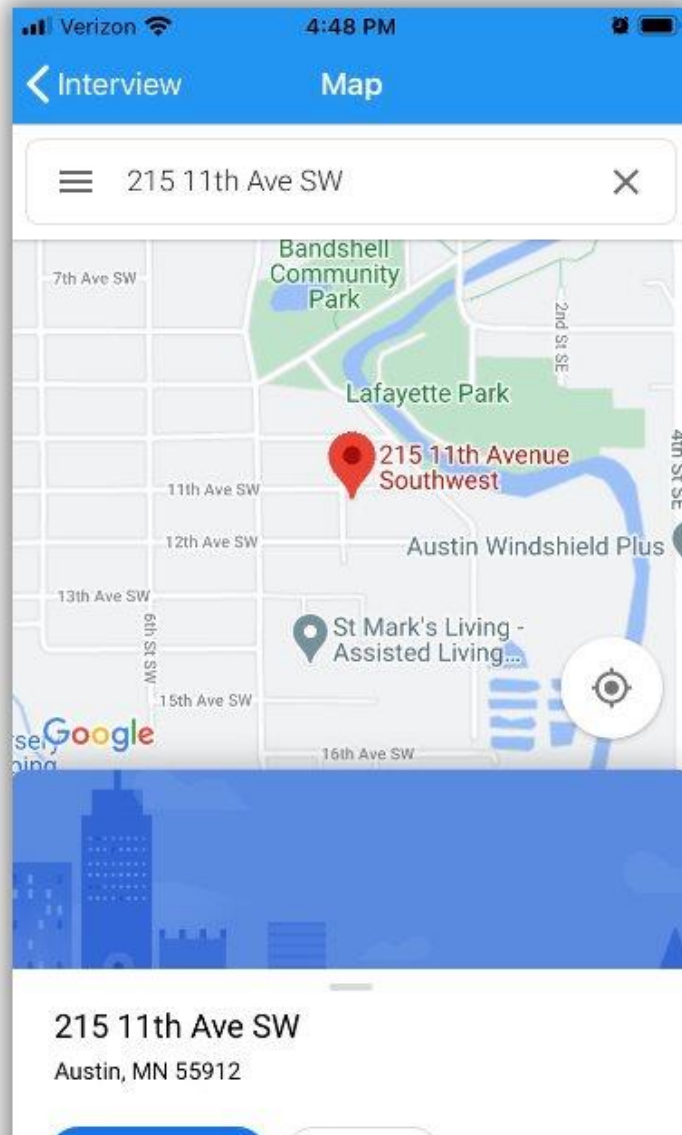


The screenshot shows a mobile application interface for an 'Interview' form. At the top, there is a blue header with a back arrow, the text 'Addresses', and the title 'Interview'. Below the header are two buttons: 'Cancel' and 'Save'. The main form area contains the following information:

- Contact Name:** Thomas (Thomas) Wayne Thomsen, with a right-pointing chevron.
- Action:** A button labeled 'Took Survey'.
- Demographics:** Male, Age: 71, Party: REP.
- Address:** 35730 Lake St, Cohasset, MN, 55721, with a location pin icon and a 'Map' button with a right-pointing chevron.
- Follow-Up Items:**
  - Wants to Contribute
  - Wants to Volunteer
- Support:**
  - Does Not Support
  - Supports Candidate
  - Undecided

 **Tip:** you can tap on the address inside of the record to open the address on a **map** app and get **directions**. Ex:

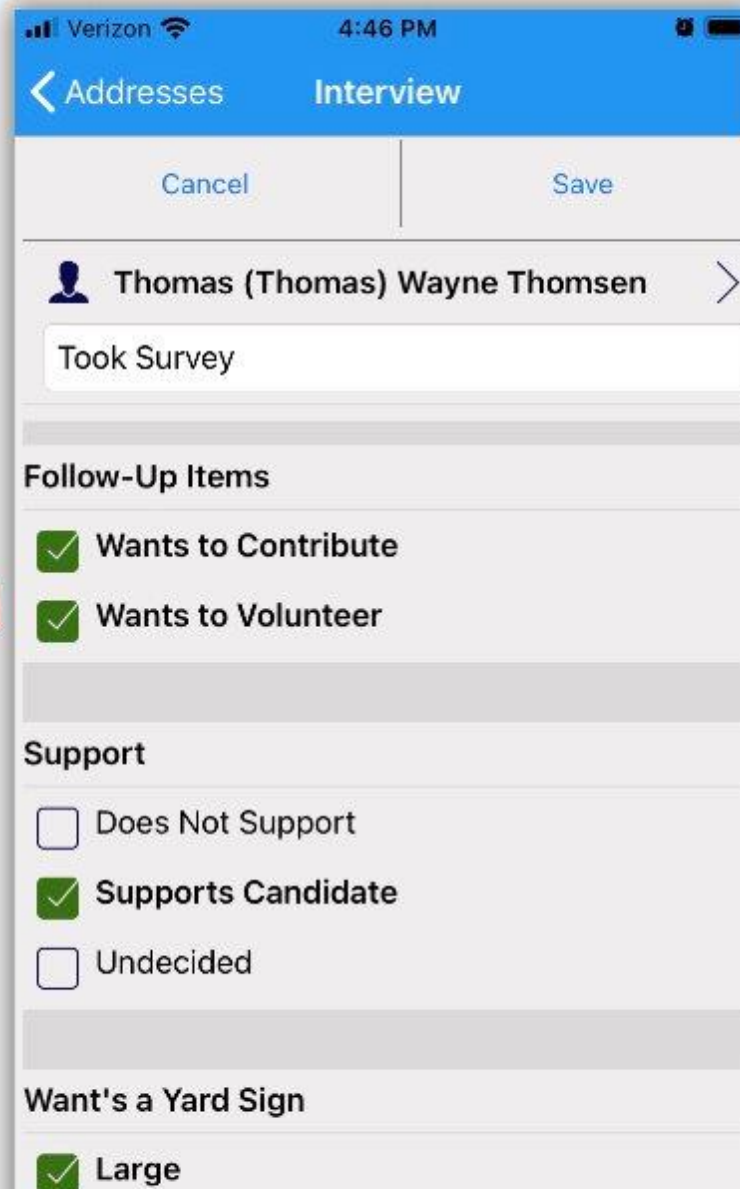
**You can tap on the address in a household's record and get directions to the house on a map.**



**Note:** if you open a household record that has more than one voter listed, you can canvass multiple people at the same time by selecting each name at the top of the record card.

Work your way down the form and check off the answers to the questions. *My example is shown below in two pictures.*

**Example canvass - img 1 of 2.**



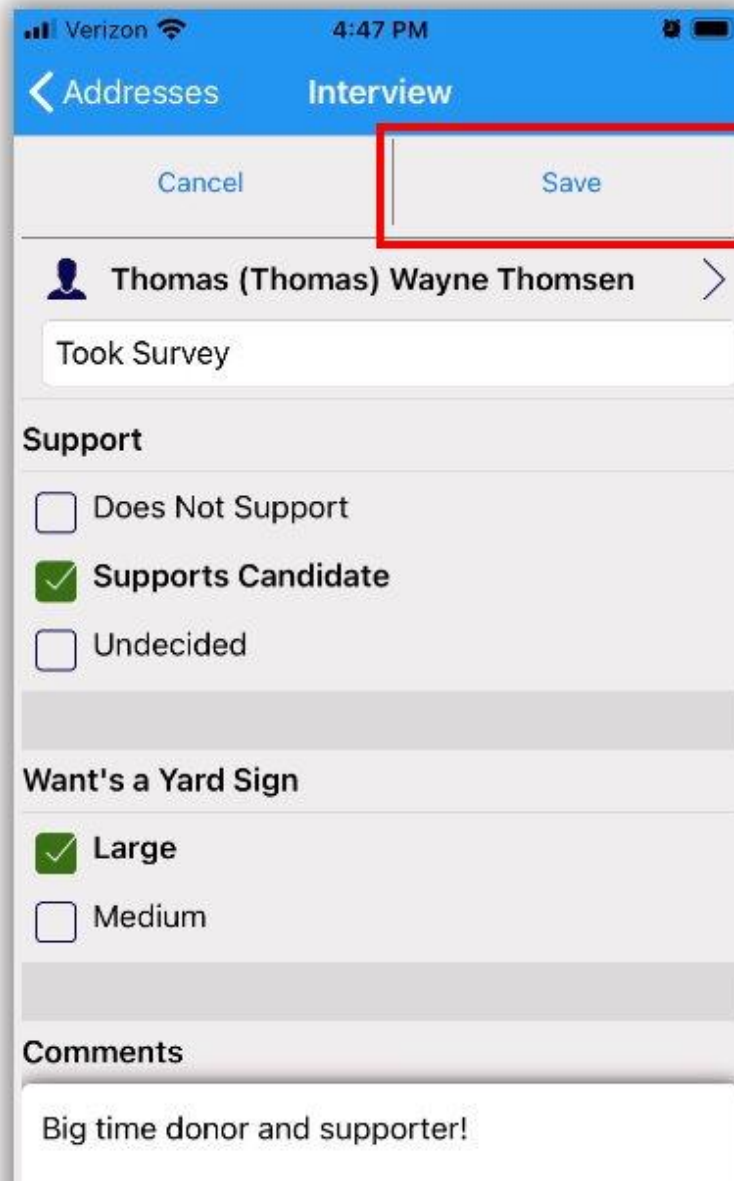
The screenshot shows a mobile application interface for a canvassing interview. At the top, the status bar shows 'Verizon' and '4:46 PM'. Below that, a blue header bar contains a back arrow, the text 'Addresses', and the title 'Interview'. Underneath the header are two buttons: 'Cancel' and 'Save'. The main content area features a profile card for 'Thomas (Thomas) Wayne Thomsen' with a right-pointing chevron. Below the name is a text input field containing 'Took Survey'. A section titled 'Follow-Up Items' contains two checked items: 'Wants to Contribute' and 'Wants to Volunteer'. Below that is a section titled 'Support' with three items: 'Does Not Support' (unchecked), 'Supports Candidate' (checked), and 'Undecided' (unchecked). At the bottom, a section titled 'Want's a Yard Sign' has one checked item: 'Large'.

**Check off the answers to your questions.**



Finish answering the questions and **add comments** if applicable. Tap on **[Save]** once complete.

**Hit [Save] once complete.**



Verizon 4:47 PM

< Addresses Interview

Cancel Save

Thomas (Thomas) Wayne Thomsen >

Took Survey

Support

Does Not Support

Supports Candidate

Undecided

Want's a Yard Sign

Large

Medium

Comments

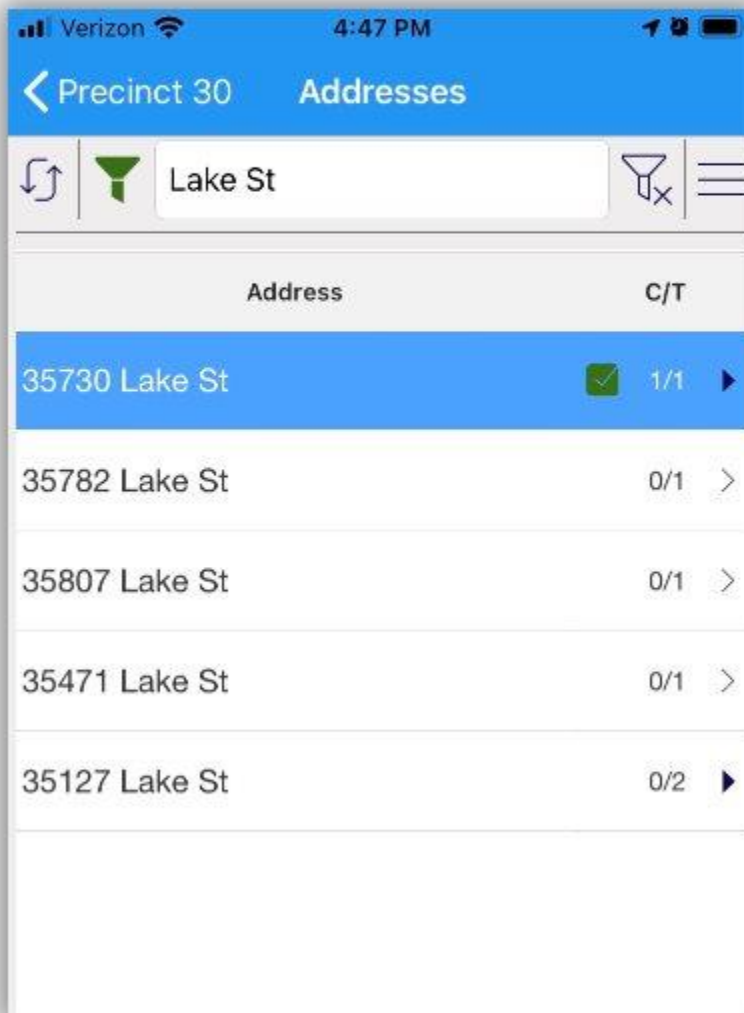
Big time donor and supporter!

**add comments**



The list of households will display a **green** or **yellow** icon next to the address to distinguish if the voters in that household have been **partially** or **fully** canvassed. *My example is below.*

## Example of a household that has been fully canvassed.




Verizon 4:47 PM

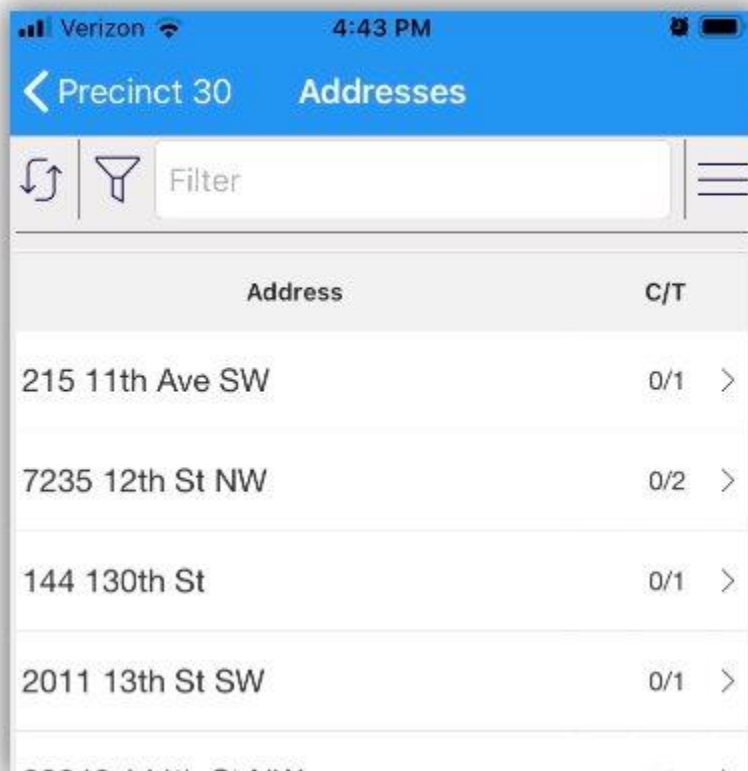
Precinct 30 Addresses

Lake St

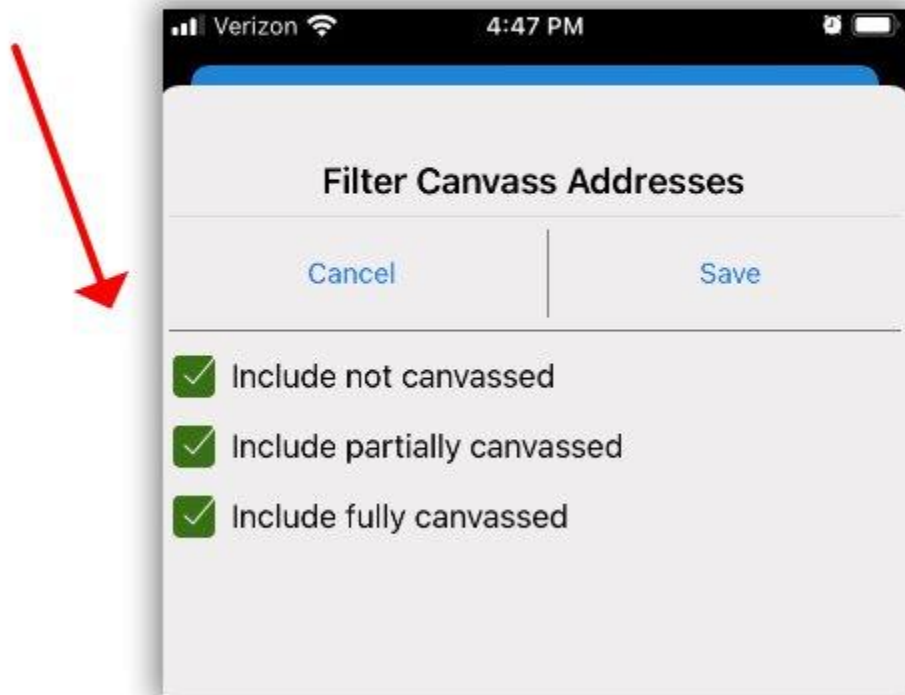
Address	C/T
35730 Lake St	✓ 1/1 ▶
35782 Lake St	0/1 >
35807 Lake St	0/1 >
35471 Lake St	0/1 >
35127 Lake St	0/2 ▶

**Repeat** these steps until all voters have been canvassed.

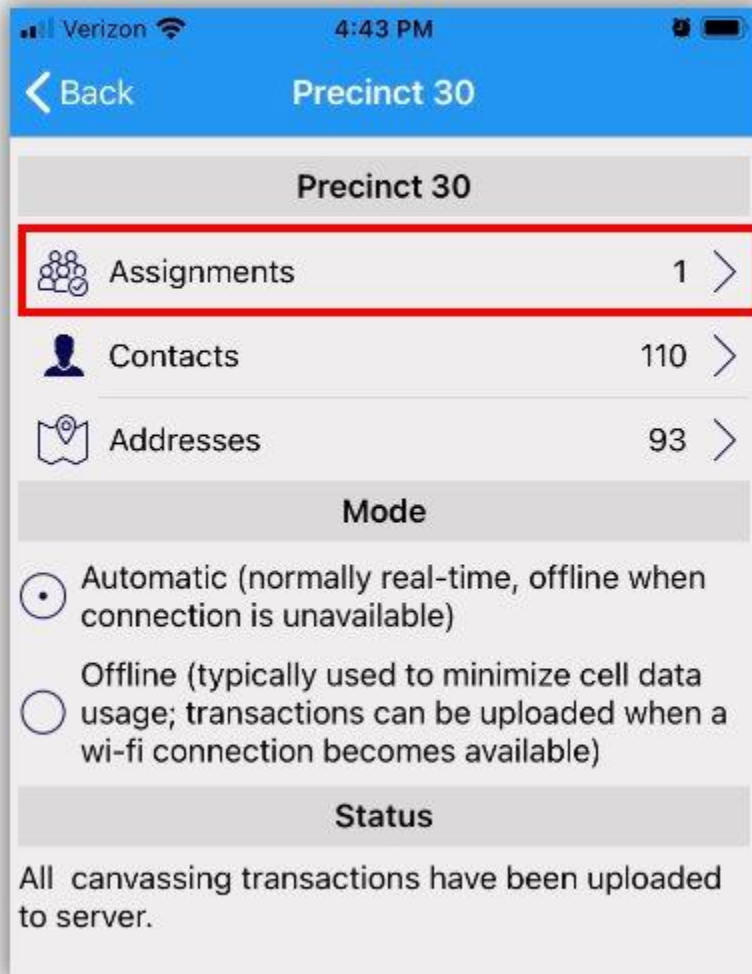
 **Tip:** you can filter the canvassing list to show just the households that have been canvassed, not canvassed, or partially canvassed, by tapping on the **menu** icon in the top-right:



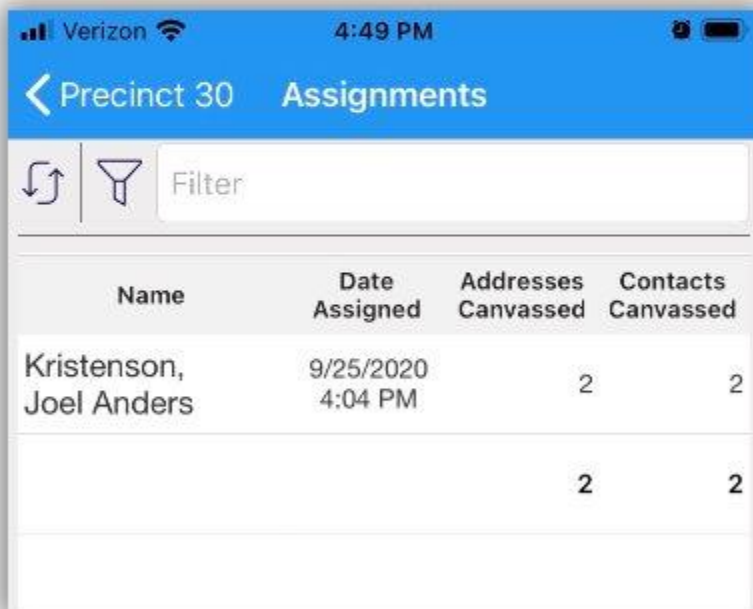
## Options for filtering the canvassing list by 'canvassed status'.



**One other tip** is that you can view a snapshot of how many voters have been canvassed and how many are left, by navigating to the **Assignments** section:



### Example of the overall stats a canvasser has completed for a particular canvassing list.



The screenshot shows a mobile application interface for "Precinct 30 Assignments". It features a table with the following data:

Name	Date Assigned	Addresses Canvassed	Contacts Canvassed
Kristenson, Joel Anders	9/25/2020 4:04 PM	2	2
		2	2

Continue on to the final section to learn how to **analyze** the **canvassing results** inside of your **Trail Blazer** database by building a [format](#) with [attributes](#).

## 5. Build a Format (Report) to Analyze the Canvassing Results

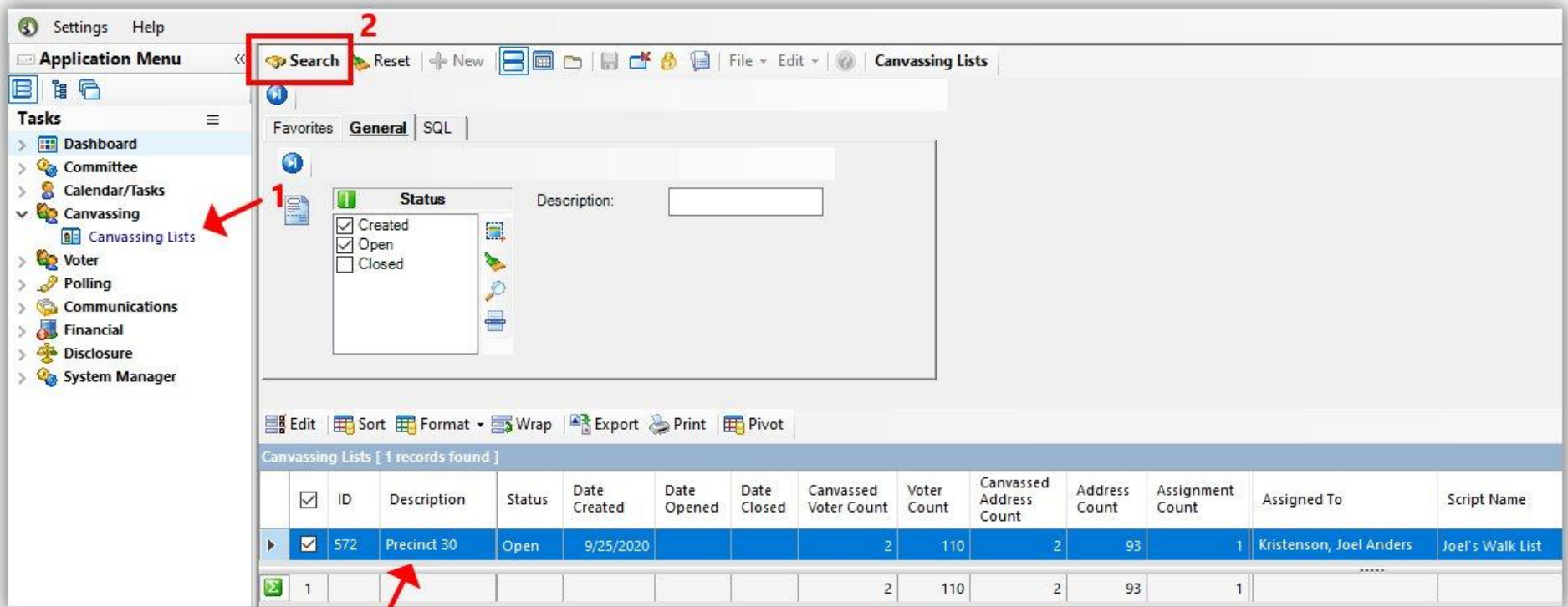
This section will show how to **search** by the **canvassing results** in your database and how to **analyze the answers** to the **canvassing questions** that are being collected. There are a few different ways to analyze canvassing results inside of the database. I walk through each of them below.

**Note:** *for an in-depth look at how to build these types of reports, this older KB article takes a deeper dive (this article uses the “older” paper walk list method but much of what is covered is still very relevant for data entry and reporting with canvassing results):*

<https://www.trailblz.com/kb/?action=view&kb=192&cat=0&qq=walk>

First, log into your **Trail Blazer** database.

You will start by going to the **Canvassing** list where you can view the overall stats by clicking the **[Search]** button (see below screenshot). You can then click the **canvassing description name** to open up the list.



**3. Click on the canvassing list name to open the list.**

**view canvassing list stats as a whole**

The first tab will be **Assignments**. The image below details all the different things you can from this tab, such as:

- Adding / removing assignments
- Change the list name



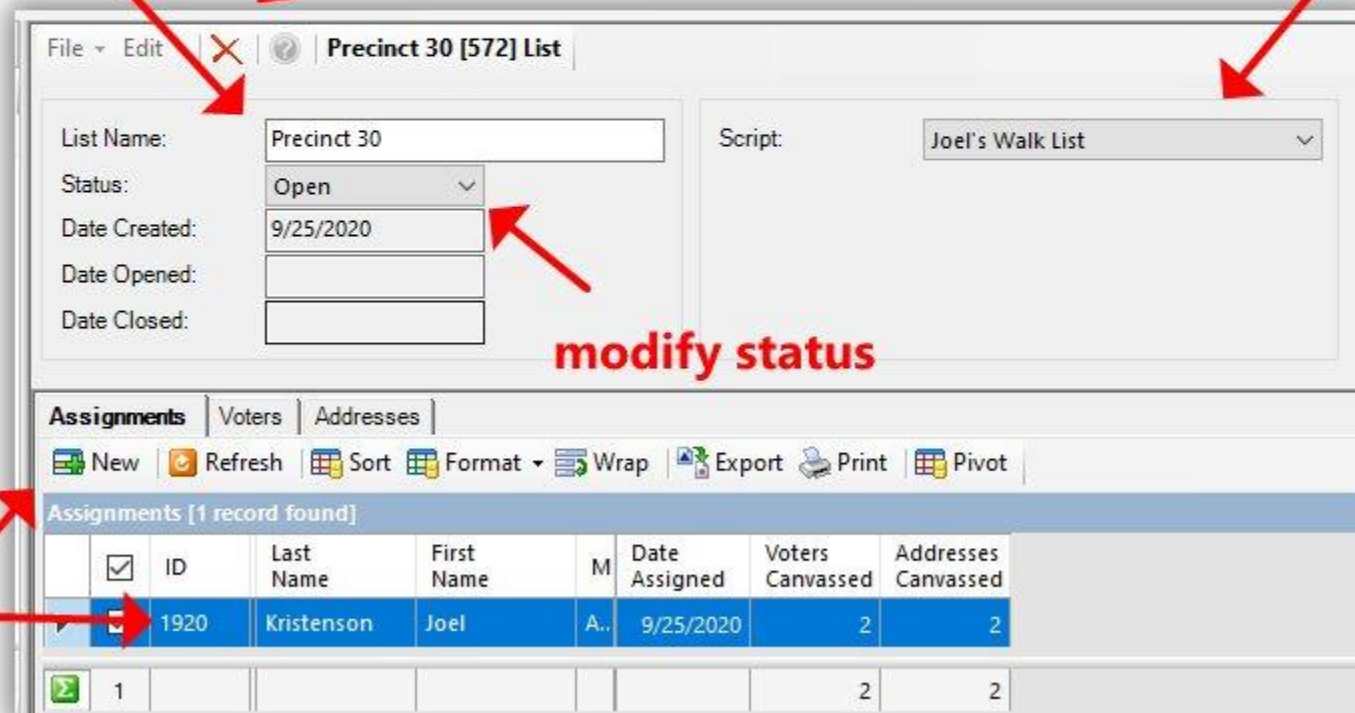
- Change the script
- Update the status

## [what you can do on the Assignments tab]

change the name

delete the list

view / change the script



The screenshot shows the 'Assignments' tab in the TrailBlazer application. The interface includes a menu bar (File, Edit), a title bar ('Precinct 30 [572] List'), and a main content area. The main content area is divided into two sections: a form for list details and a table for assignments. The form section includes fields for 'List Name' (Precinct 30), 'Status' (Open), 'Date Created' (9/25/2020), 'Date Opened', and 'Date Closed'. A 'Script' dropdown menu is set to 'Joel's Walk List'. The table section shows a single assignment record for ID 1920, assigned to Kristenson, Joel, on 9/25/2020, with 2 voters canvassed and 2 addresses canvassed. A toolbar below the table includes buttons for New, Refresh, Sort, Format, Wrap, Export, Print, and Pivot. A summary row at the bottom shows a total of 1 assignment, 2 voters, and 2 addresses.

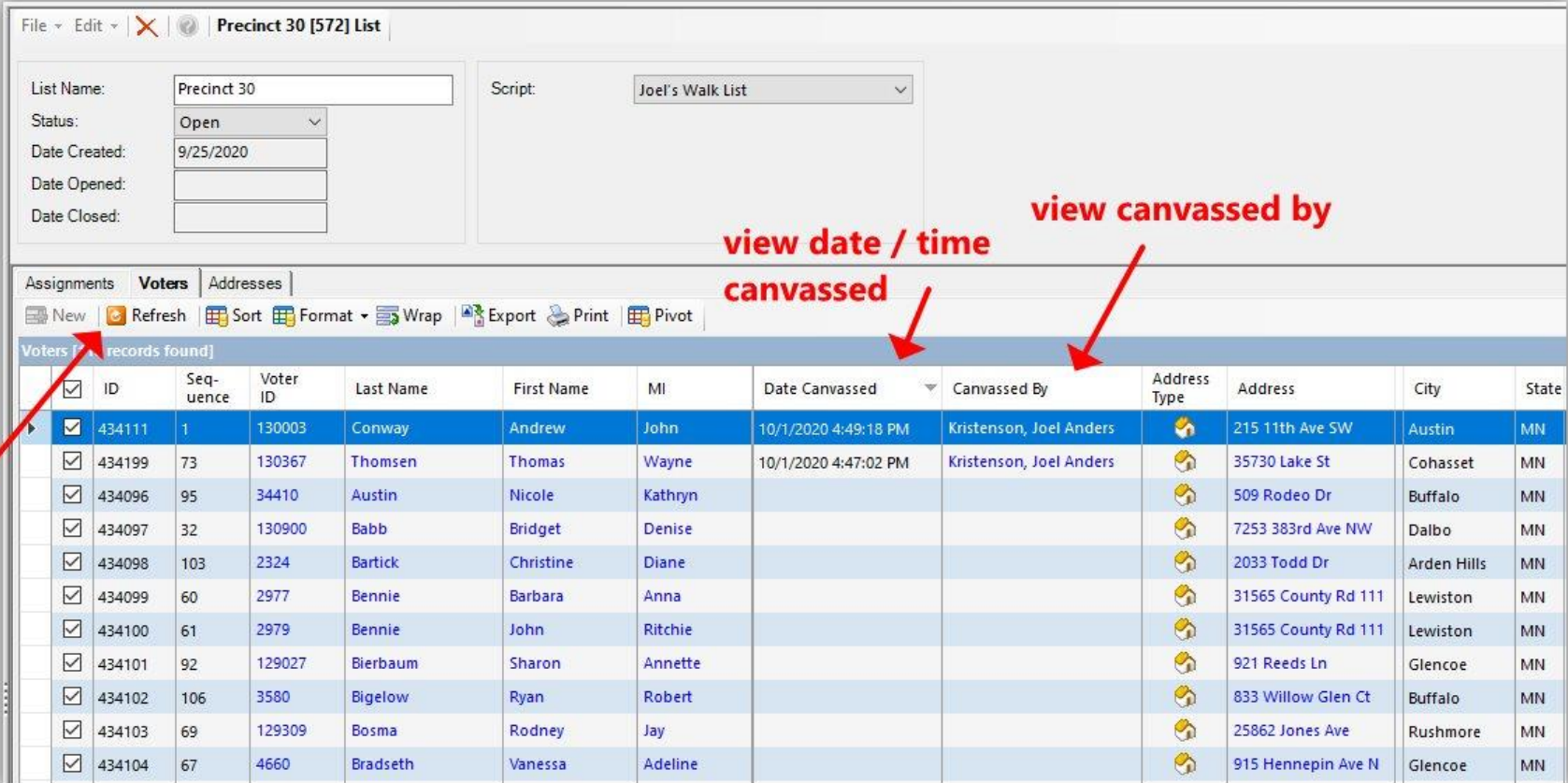
ID	Last Name	First Name	M	Date Assigned	Voters Canvassed	Addresses Canvassed
1920	Kristenson	Joel	A.	9/25/2020	2	2
Σ 1					2	2

modify status

add / remove assignments

## Create and Run a Mobile Canvassing (Walk) List – Setting Up Users, Creating a Script, Etc.

Under the **Voters** tab you will be able to sort the list by the **date / time** that a voter was canvassed and also view / sort by **who canvassed** the voter. The image below details this.



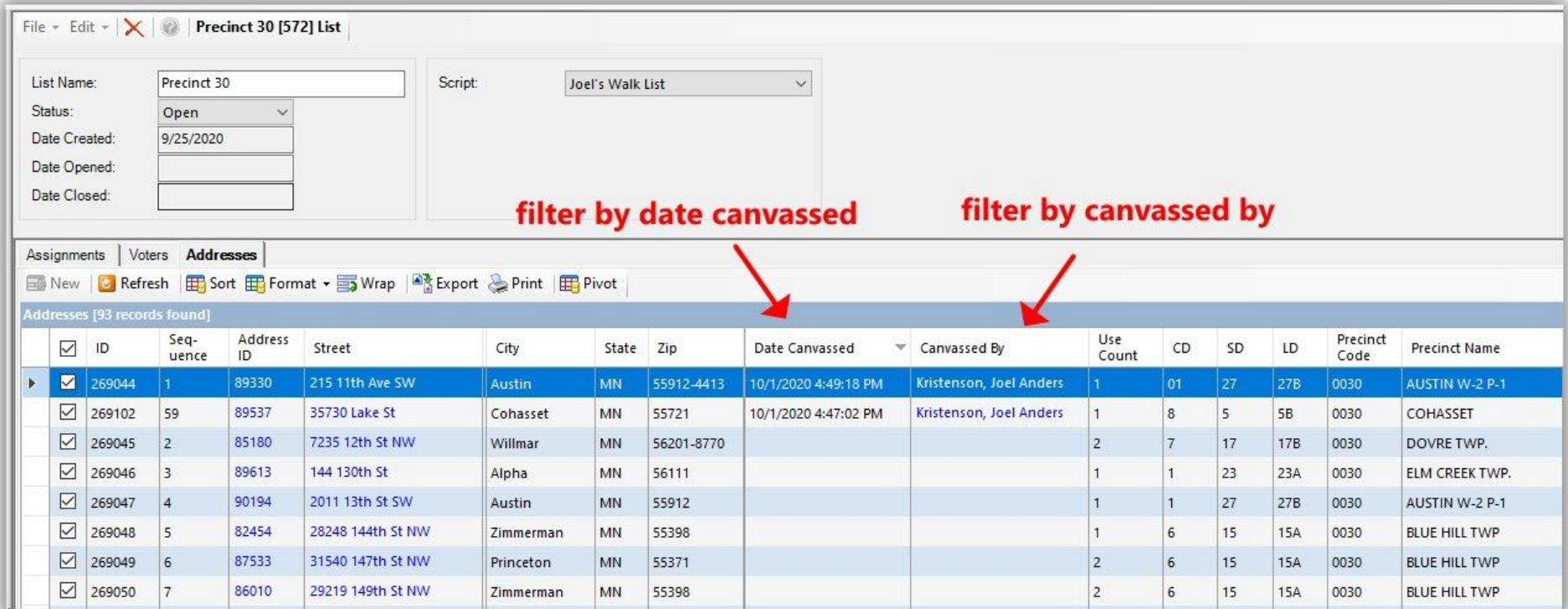
**refresh for real time updates**

**view date / time canvassed**

**view canvassed by**

ID	Seq- uence	Voter ID	Last Name	First Name	MI	Date Canvassed	Canvassed By	Address Type	Address	City	State
434111	1	130003	Conway	Andrew	John	10/1/2020 4:49:18 PM	Kristenson, Joel Anders		215 11th Ave SW	Austin	MN
434199	73	130367	Thomsen	Thomas	Wayne	10/1/2020 4:47:02 PM	Kristenson, Joel Anders		35730 Lake St	Cohasset	MN
434096	95	34410	Austin	Nicole	Kathryn				509 Rodeo Dr	Buffalo	MN
434097	32	130900	Babb	Bridget	Denise				7253 383rd Ave NW	Dalbo	MN
434098	103	2324	Bartick	Christine	Diane				2033 Todd Dr	Arden Hills	MN
434099	60	2977	Bennie	Barbara	Anna				31565 County Rd 111	Lewiston	MN
434100	61	2979	Bennie	John	Ritchie				31565 County Rd 111	Lewiston	MN
434101	92	129027	Bierbaum	Sharon	Annette				921 Reeds Ln	Glencoe	MN
434102	106	3580	Bigelow	Ryan	Robert				833 Willow Glen Ct	Buffalo	MN
434103	69	129309	Bosma	Rodney	Jay				25862 Jones Ave	Rushmore	MN
434104	67	4660	Bradseth	Vanessa	Adeline				915 Hennepin Ave N	Glencoe	MN

The last tab inside of the canvassing list record is the **Addresses** tab. You can do virtually the same thing as the **Voters** tab from this section, but the data will display more in-depth information on the address records. The image below details this further.



**filter by date canvassed**      **filter by canvassed by**

ID	Seq- uence	Address ID	Street	City	State	Zip	Date Canvassed	Canvassed By	Use Count	CD	SD	LD	Precinct Code	Precinct Name
269044	1	89330	215 11th Ave SW	Austin	MN	55912-4413	10/1/2020 4:49:18 PM	Kristenson, Joel Anders	1	01	27	27B	0030	AUSTIN W-2 P-1
269102	59	89537	35730 Lake St	Cohasset	MN	55721	10/1/2020 4:47:02 PM	Kristenson, Joel Anders	1	8	5	5B	0030	COHASSET
269045	2	85180	7235 12th St NW	Willmar	MN	56201-8770			2	7	17	17B	0030	DOVRE TWP.
269046	3	89613	144 130th St	Alpha	MN	56111			1	1	23	23A	0030	ELM CREEK TWP.
269047	4	90194	2011 13th St SW	Austin	MN	55912			1	1	27	27B	0030	AUSTIN W-2 P-1
269048	5	82454	28248 144th St NW	Zimmerman	MN	55398			1	6	15	15A	0030	BLUE HILL TWP
269049	6	87533	31540 147th St NW	Princeton	MN	55371			2	6	15	15A	0030	BLUE HILL TWP
269050	7	86010	29219 149th St NW	Zimmerman	MN	55398			2	6	15	15A	0030	BLUE HILL TWP

**Note:** if you click on the name of the voter in the **Voter** tab you can view the voter’s **attributes** that they “answered” on the script. See the two example screenshots below:

Voters [110 records found]									
	<input checked="" type="checkbox"/>	ID	Sequence	Last Name	First Name	Date Canvassed	Canvassed By	Address Type	Address
	<input checked="" type="checkbox"/>	434111	1	Conway	Andrew	10/1/2020 4:49:18 PM	Kristenson, Joel...		215 1
	<input checked="" type="checkbox"/>	434199	73	Thomsen	Thomas	10/1/2020 4:47:02 PM	Kristenson, Joel...		35730
	<input checked="" type="checkbox"/>	434096	95	Austin	Nicole				509 R
	<input checked="" type="checkbox"/>	434097	32	Babb	Bridget				7253
	<input checked="" type="checkbox"/>	434098	103	Bartick	Christine				2033
	<input checked="" type="checkbox"/>	434099	60	Bennie	Barbara				31565

**click on a voter's name  
to view more details**

Under the **Attributes** tab inside of the voter's record you can expand the attribute folder used for the canvassing script that you used, and view the results of the questions that were asked. My *example* is below.



Andrew (Andrew) John Conway [130003]  
215 11th Ave SW  
Austin, MN 55912-4413  
Home: 507-369-3069  
Cell: 506-802-9461  
Alt: 225-769-2426

Dashboard | General | Household | Gallery | Vote History | **Attribute** | Relation | Financial | Pledge | Time | Event | Logs | L

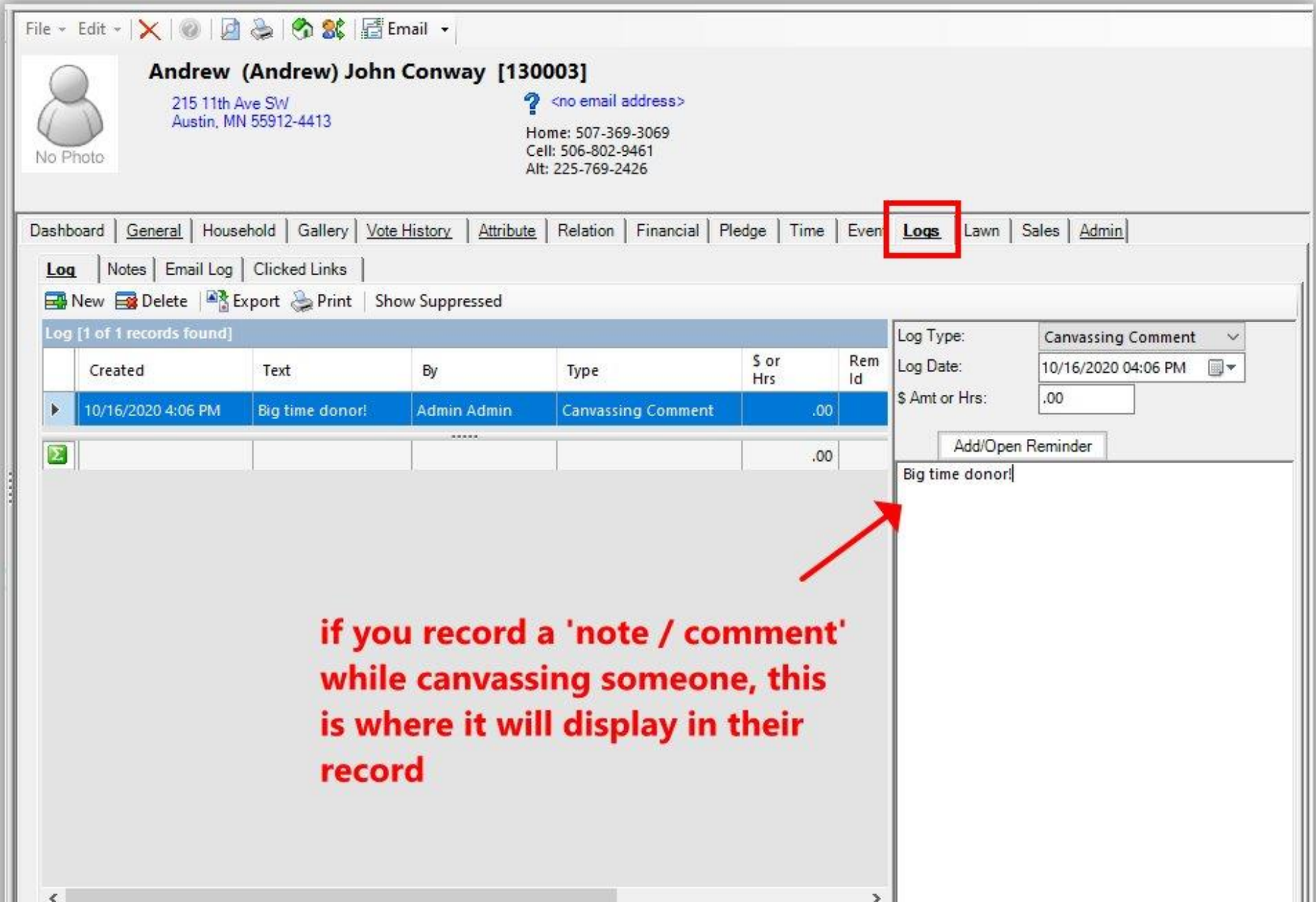
Show Hidden Show Checked Only

Attribute	Yes	Date	Note / Value
Attribute (tags or segments or categories or voter id'ing)	<input checked="" type="checkbox"/>		
As of right now, would you say you have a favorable or un...	<input type="checkbox"/>		
Candidate Phone Call Completed	<input type="checkbox"/>		
Joel's Walk List	<input checked="" type="checkbox"/>		
Follow-Up Items	<input type="checkbox"/>		
Wants to Contribute	<input type="checkbox"/>		
Wants to Volunteer	<input type="checkbox"/>		
Support	<input checked="" type="checkbox"/>		
Does Not Support	<input type="checkbox"/>		
Supports Candidate	<input checked="" type="checkbox"/>	10/1/2020	
Undecided	<input type="checkbox"/>		
Want's a Yard Sign	<input checked="" type="checkbox"/>		
Large	<input checked="" type="checkbox"/>	10/1/2020	
Medium	<input type="checkbox"/>		
Media	<input type="checkbox"/>		
Not	<input type="checkbox"/>		
Poll Watch - Primary 2018	<input type="checkbox"/>		
Poll Watch - Primary 2020	<input type="checkbox"/>		
Skills	<input type="checkbox"/>		
Source	<input checked="" type="checkbox"/>		

expand the script folder

answers to canvassing questions

If you capture a **comment / note** via the mobile canvassing app, that note will display under the **Logs** tab > **Logs** sub-tab of the voter's record.  
Example:



File Edit [Icons] Email

**Andrew (Andrew) John Conway [130003]**  
215 11th Ave SW  
Austin, MN 55912-4413  
Home: 507-369-3069  
Cell: 506-802-9461  
Alt: 225-769-2426

Dashboard | General | Household | Gallery | Vote History | Attribute | Relation | Financial | Pledge | Time | Even | **Logs** | Lawn | Sales | Admin

**Log** | Notes | Email Log | Clicked Links

New Delete Export Print Show Suppressed

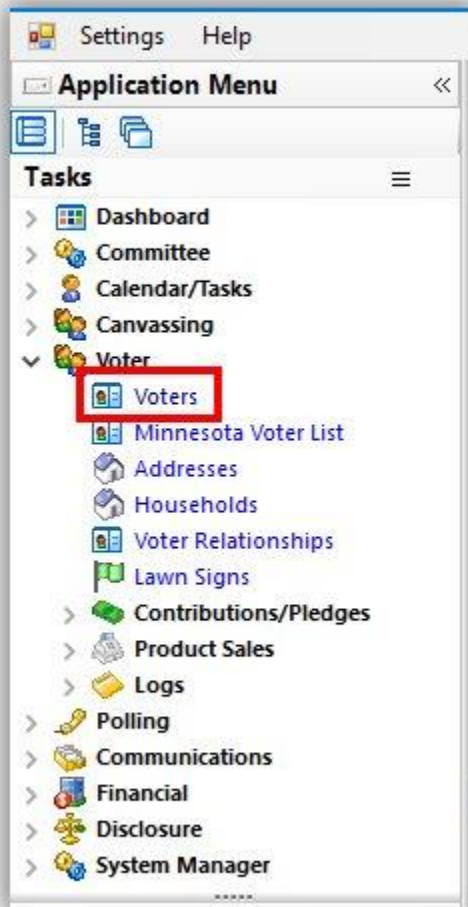
Log [1 of 1 records found]						
Created	Text	By	Type	\$ or Hrs	Rem Id	
10/16/2020 4:06 PM	Big time donor!	Admin Admin	Canvassing Comment	.00		

Log Type: Canvassing Comment  
Log Date: 10/16/2020 04:06 PM  
\$ Amt or Hrs: .00  
Add/Open Reminder  
Big time donor!

**if you record a 'note / comment' while canvassing someone, this is where it will display in their record**



Moving on to the other way you can view canvassing results; navigate to the **Voters** list.



Navigate to the **Canvass** tab and **'Plug'** it in to activate it for searching. You can then run searches for voters that are part of specific canvassing lists, and filter further by their **Canvass Processing status**. *My example is below, where I searched for voters that were canvassed for the Precinct 30 list. So far there were two people processed.*

## searching for voters that have been canvassed in a specific canvassing assignment

5

1

2

3

4

5

Search Reset New [Icons] File Edit Include Other Voters

Favorites General Address Household Vote History **Canvass** Relation Lawn Sign Contribute Pledge

Canvassing Lists

- Precinct 30

Canvass Processing

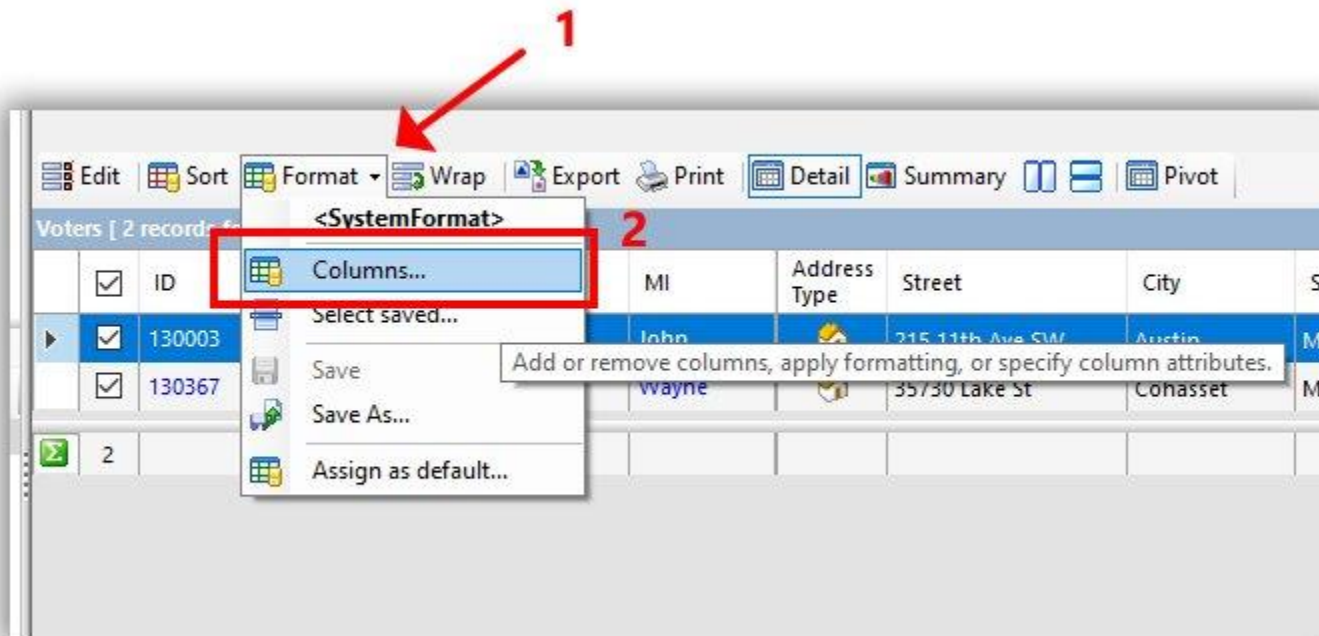
- Voter Processed
- Voter Not Processed
- Address Processed
- Address Not Processed

Edit Sort Format Wrap Export Print Detail Summary Pivot

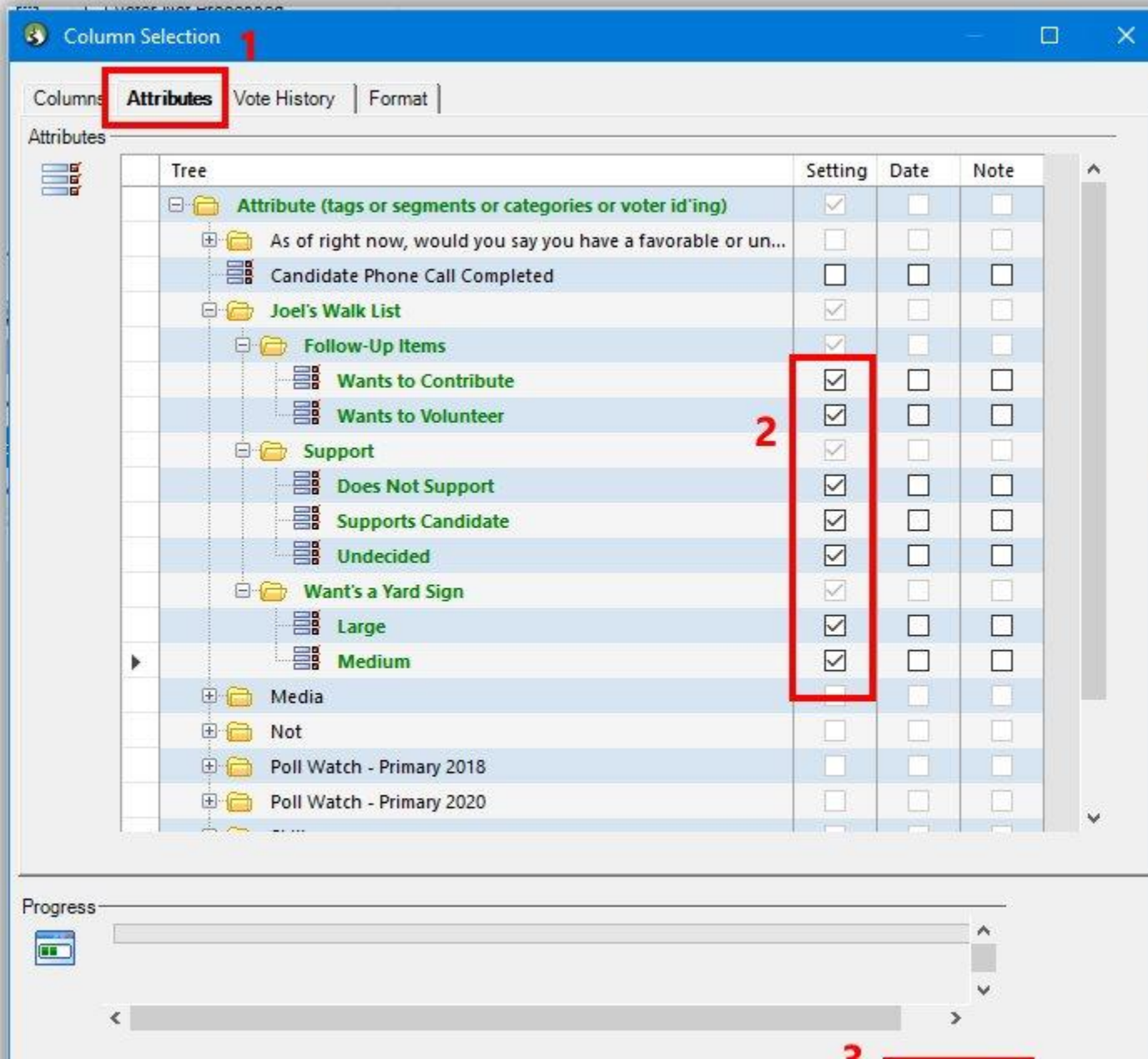
Voters [ 2 records found ]

<input checked="" type="checkbox"/>	ID	Last Name	First Name	MI	Address Type	Street	City	State
<input checked="" type="checkbox"/>	130003	Conway	Andrew	John		215 11th Ave SW	Austin	MN
<input checked="" type="checkbox"/>	130367	Thomsen	Thomas	Wayne		35730 Lake St	Cohasset	MN

Click **Format > Columns...**



Navigate to the **Attributes** tab and **expand [+]** the folder that contains your canvassing script. Check the boxes in the **Settings** column to add in the answers to the questions that you are asking. *My example is below.*



Column Selection 1

Columns: **Attributes** | Vote History | Format

Attributes

Tree	Setting	Date	Note
Attribute (tags or segments or categories or voter id'ing)	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
As of right now, would you say you have a favorable or un...	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Candidate Phone Call Completed	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Joel's Walk List	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Follow-Up Items	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Wants to Contribute	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Wants to Volunteer	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Support	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Does Not Support	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Supports Candidate	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Undecided	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Want's a Yard Sign	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Large	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Medium	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Media	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Not	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Poll Watch - Primary 2018	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Poll Watch - Primary 2020	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Progress

2

Click **[OK]** to finish adding these questions/answers into the grid. The columns will display on the far right by default (you can click-and-drag them left or right to rearrange them).

Canvass Processing


Voter Processed

Voter Not Processed

Address Processed

Address Not Processed

answers to canvassing questions added to the format



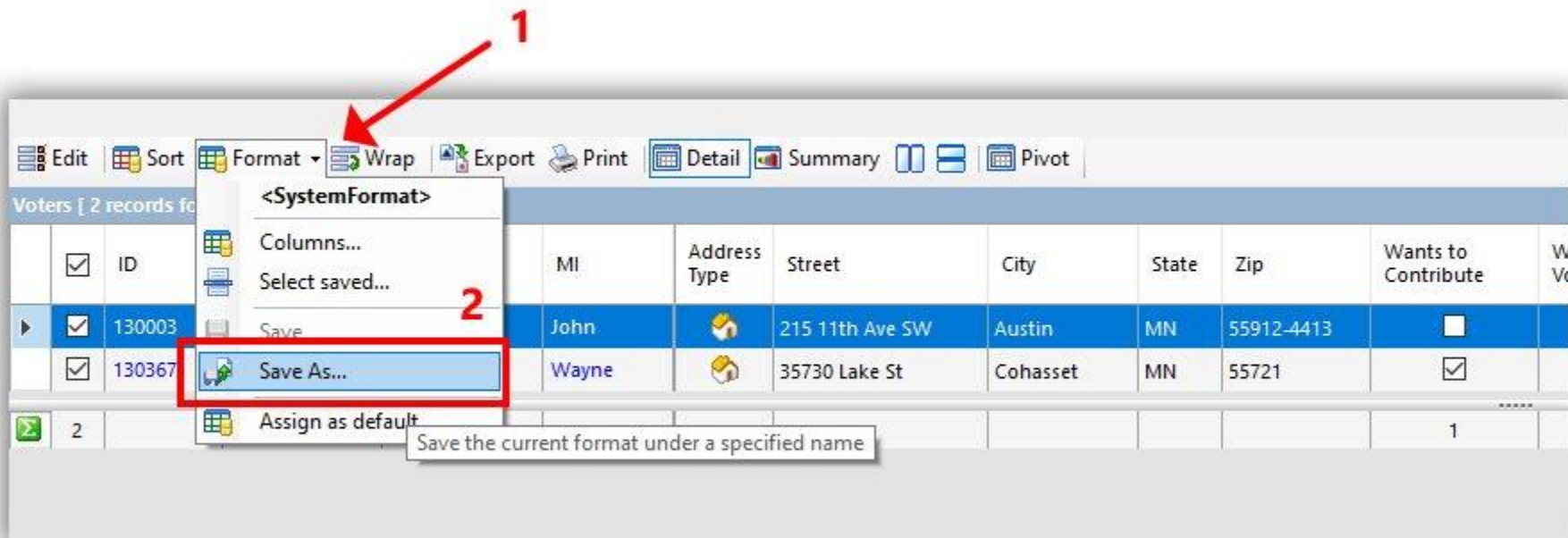
Print | Detail | Summary | Pivot

MI	Address Type	Street	City	State	Zip	Wants to Contribute	Wants to Volunteer	Does Not Support	Supports Candidate	Undecided	Large	Medium
John		215 11th Ave SW	Austin	MN	55912-4413	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Wayne		35730 Lake St	Cohasset	MN	55721	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
						1	1	0	2	0	2	0

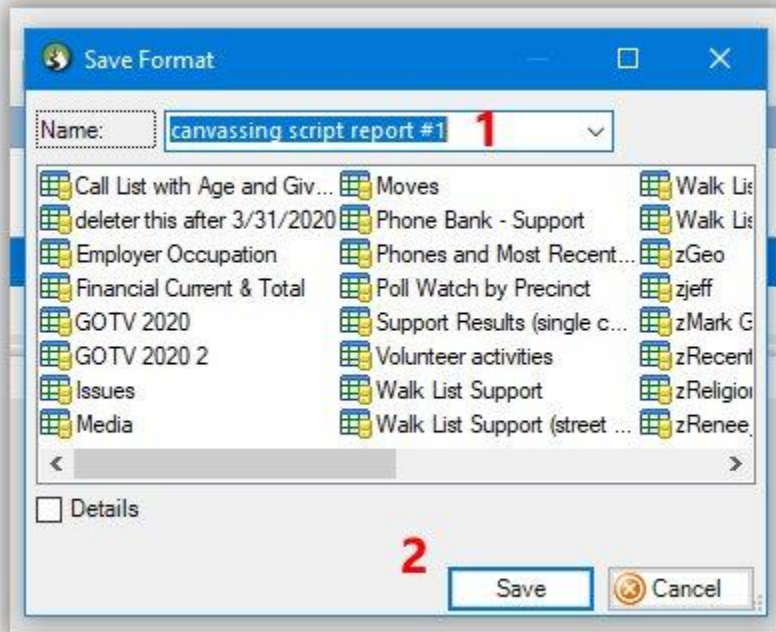


The **answers** to the questions your canvassers are checking off will **tally** at the bottom of each column (providing you with good insight into things like: what issues are people most interested in, do they support your candidate, do they want to volunteer, do they want a yard sign, etc.).

To **save the format** (view) for future use, click **Format > Save As...**



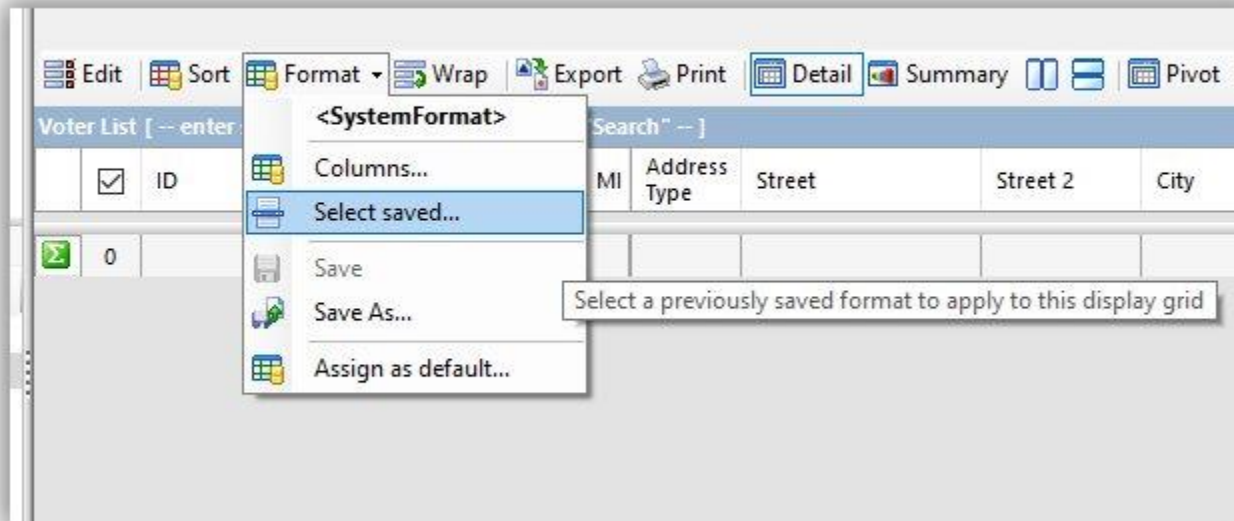
Give the format a **name** and click [**Save**].



To access the saved **Format** (aka “view or report”) in the future, click **Format > Select Saved...** and load the format.



### loading the format in the future



You can also assign the format as your **default**. This article provides a deeper dive on how to build, save, and manipulate formats: <https://www.trailblz.com/kb/?action=view&kb=272&cat=0&qq=format>

The **related resources** below provide some more information on how to cut turf and canvass using the **Trail Blazer** software.



Trail Blazer™

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

## Related Resources

**Article:** [How to Create Attribute Folders and Attribute Items \(Custom Categories\)](#)

**Article:** [Walk List, Selectable Format – How to Create Paper Walk Lists with Questions and How to Enter the Results in 'Batch Mode'](#)

**Article:** [Adding a New Database User and Setting their Security Settings](#)

**Article:** [Creating and Saving Default Formats for Reporting with the Grid](#)

**Video:** [Turf Cutting](#)

**Video:** [Door to Door Canvassing Using iPhone or Android](#)

**Video:** [Take Photo From Phone App](#)

**Video:** [Trail Blazer Mobile App for Apple and Android](#)

## Trail Blazer Live Support

☎ **Phone:** 1-866-909-8700

✉ **Email:** [support@trailblz.com](mailto:support@trailblz.com)

f **Facebook:** <https://www.facebook.com/pages/Trail-Blazer-Software/64872951180>

t **Twitter:** <https://twitter.com/trailblazersoft>

*\* As a policy we require that you have taken our intro training class before calling or emailing our live support team.*

*[Click here](#) to view our calendar for upcoming classes and events. You can sign up other members on your team for the same training.*

*\* After registering you'll receive a confirmation email with the instructions for how to log into the [GoToMeeting](#) session where we host our live interactive training classes.*

*\* This service is included in your contract.*