

BRAND YOUR ELECTION

Go to: configuration > branding

Main Navigation

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1 Your association name will be displayed on the Election Website and link to your URL so voters can return to your website.

2 Your logo will be prominently displayed on the election site. Please note PNG format is preferred. Max size 1MB.


Your Association/Company

Name

URL

Your Logo and Colors

Current Logo



New Logo No file chosen

Please provide a PNG (preferred), JPG, or GIF image no more than 1MB in size

SET VOTER CREDENTIALS

Go to: configuration > credentials

You can control your Voters' Credentials here. Your voters will be prompted via the election login screen to provide these credentials to access to the ballot.

| 1 | 2 | 3 | 4 | 5 | 6 |
|---------------|-------------------------------------|-------------------------------------|----------------------------------|----------------------------------|------------|
| DB Field | Enabled | Unique | Login 1 | Login 2 | Label |
| First Name | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="radio"/> | <input type="radio"/> | |
| Last Name | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="radio"/> | <input type="radio"/> | |
| Member Number | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="radio"/> | <input type="radio"/> | |
| Email | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="radio"/> | <input type="radio"/> | |
| Username | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="radio"/> | <input checked="" type="radio"/> | User Login |
| Password | <input type="checkbox"/> | <input type="checkbox"/> | <input type="radio"/> | <input type="radio"/> | |
| Name | <input type="checkbox"/> | <input type="checkbox"/> | <input type="radio"/> | <input type="radio"/> | |
| Title | <input type="checkbox"/> | <input type="checkbox"/> | <input type="radio"/> | <input type="radio"/> | |
| Custom 1 | <input type="checkbox"/> | <input type="checkbox"/> | <input type="radio"/> | <input type="radio"/> | |
| Custom 2 | <input type="checkbox"/> | <input type="checkbox"/> | <input type="radio"/> | <input type="radio"/> | |

2 - Select the voter fields you will upload

3 - Select which field is unique* to each user

4 - Select first login field

5 - Select second login field

6 - Customize Field name

Note: You must enable Email field to send emails from the election system.

* Unique: No two (or more) users can have the same value in the unique field. For example, if the member number is flagged as unique, it must be different for each user (member A and member B cannot have the same user number of '101').

UPLOAD VOTERS

Go to: voters > upload CSV

If you have multiple users to upload, or to set up your initial voter database, use the "Upload CSV" option. This allows you to upload a .CSV (comma separated value) file of members – as you would export from Excel, Access, or another database program.



Follow on screen instructions.
For help, refer to pages 16-19 of the [Voting Manager Overview](#)

Note: Voter file for upload must be in CSV format.

SET ELECTION WINDOW

Go to: ballot > election window

Validate or change the election date, time, and time zone if necessary.

BUILD BALLOT

Go to: 1 - ballot > settings
2 - ballot > positions

1 Here, you can customize ballot display settings and rules and also change election name.

| Actions | Name | Ordinal | Selection Limit | Allow Write-Ins | Group Restrictions |
|--|--|---------|-----------------|-----------------|--------------------|
| Edit Candidates Add Candidate Add Multiple Delete | President | 1 | 1 | Yes | |
| Edit Candidates Add Candidate Add Multiple Delete | Treasurer | 2 | 1 | Yes | |
| Edit Candidates Add Candidate Add Multiple Delete | Western Region Communication Committee | 3 | 4 | Yes | Western Region |

Manage the position and its candidates

Note: you must create the position prior to adding a candidate.

BUILD BALLOT (CONTINUED)

Go to: 3 - ballot > bylaws

Bylaws Amendments is a list of current bylaw amendments, propositions, or actions for vote on the ballot. If no amendments exist, tap the **Add** button on the top right. Your new Amendment will now be listed on the Bylaws Amendments screen (below). From the Bylaws table, use the Action icons (A) to edit a bylaw, delete it, view options, change the bylaws order on the ballot (B), or add new options to the amendment.

3

Bylaws Amendments

Download CSV 10 records per page Show/Hide Columns

Search all columns:

B

| Actions | Name | Ordinal | Question | Group Restrictions |
|---|-----------------------|---------|----------------------------|--------------------|
| <p>A</p> <ul style="list-style-type: none"> Edit Options Add Option Add Multiple Delete | Example Proposition 1 | 1 | Should we change our logo? | |

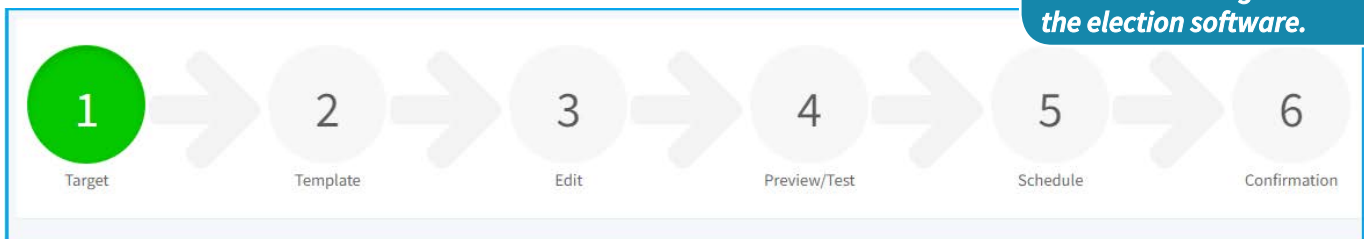
Showing 1 to 1 of 1 entries

Previous 1 Next

EMAIL ANNOUNCEMENT

Go to: email announcements > add campaign

Note: You must add/schedule the campaign for voters to receive an email with voting credentials from the election software.



Step 1: Name the campaign (ex: election announcement") & set the target audience (ex: Not Voted) & save.

Step 2: Select the template (Announcement Email NOT Reminder) & save.

Step 3: Make any edit to the template. All yellow highlighted fields should remain in the template. Select Preview/Test.

Step 4: Preview the announcement & select Schedule.

Step 5: Schedule campaign for Start of Election date/time. Select Save Schedule.

Step 6: Confirmation shows the scheduled campaign details.

Detailed instructional video: <https://youtu.be/g8YnHFP8XAE>

RESULTS

President

Download CSV 50 records per page Show/Hide Columns

Search all columns:

| Option | Unweighted Total | Total |
|----------------|------------------|-------|
| Tom Smoker* | 3 | 5.000 |
| Bob Smoker | 1 | 1.000 |
| Jonathan Brown | 0 | 0.000 |

Showing 1 to 3 of 3 entries

Previous 1 Next

Bold/* - Current top vote getter. *Italic/(Tie)* - Indicates tie for the final top-vote-getter position(s).

Go to: results > vote counts
Here, you can view the results of the election.

Go to: results > who's voted
Here, you can see who has already voted and when they have voted.

Who's Voted

Who's Voted

Download CSV 10 records per page Show/Hide Columns

Search all columns:

| First Name | Last Name | Member Number | Weight | Groups | Start Time | Cast Time | IP Address |
|------------|-----------|---------------|--------|--------|------------------------|------------------------|----------------|
| casey | edwards | 1414 | 1.00 | | 04/27/2017 9:51 am EDT | 04/27/2017 9:51 am EDT | 107.143.140.42 |

Showing 1 to 1 of 1 entries

Previous 1 Next

Go to: results > export
You can also request an election summary report PDF with details regarding your election results. This report will be emailed to the Voting Manager when requested.

Export Results

Format* PDF Excel

Report Components* Election Summary Vote Counts Ballot Language
 Voter List Group Analysis Member Ballots
 Reopened Ballots

Member Ballot Reporting Mode* Make Ballots Anonymous Show Member Identification

Include nonvoting members as well? No Yes
If you request the voter list or the group analysis, this will list those members who voted or those members in that group who voted. Setting this to 'Yes' will include nonvoters in a separate list; setting it to 'No' will only include those who cast a ballot and those who started a ballot.

Notification Email
If you provide a notification email address, an email will be sent when the report is ready. You can always check the status of your report in the table below this form. If you have multiple emails, please enter them separated by commas.

* Required Request Report

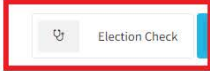



Check Election Prior to Launch

Go to: Dashboard > Select Election Check

Tap the blue "Run Election Check" bar to run the Election Check.

Election Window, Credentials, and Ballot Settings

- Election Name: Special Meeting of Members Online Voting - November 19-22 2022
- Start: November 19, 2022 8:00 am EST
- End: November 22, 2022 8:00 pm EST
- Timezone: America/New_York

HELP

For more help, click the help icon  at the top of the page or refer to the [Voting Manager Overview](#)