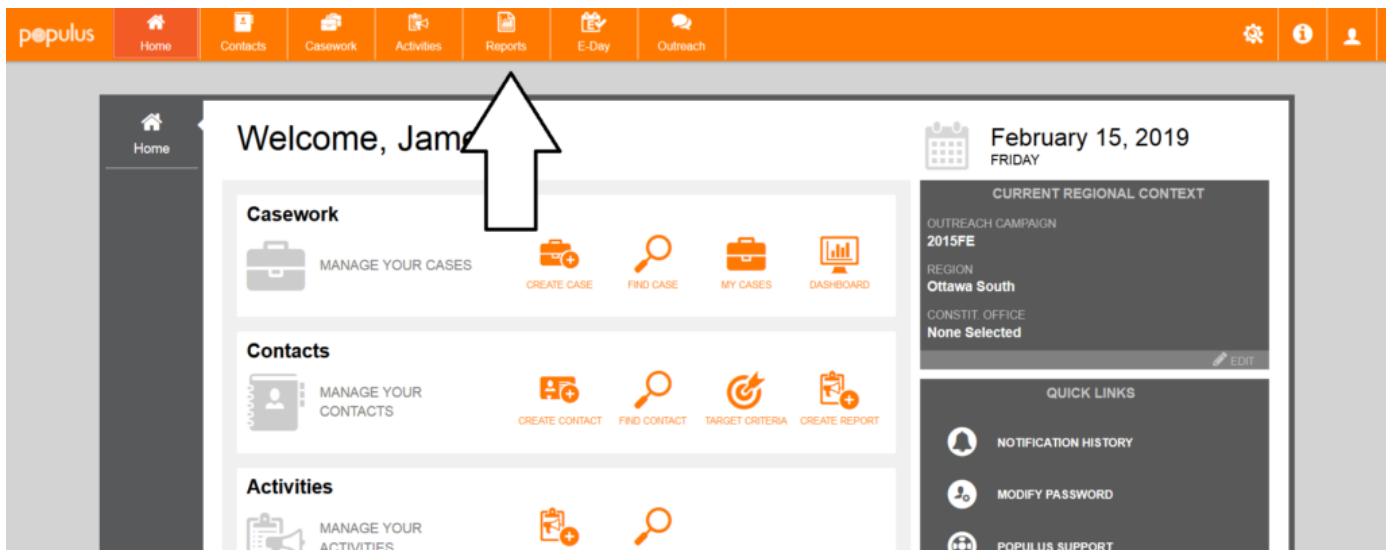


📞 Setting up Call Campaigns in Callhub

⚠️ Please follow all steps exactly, or we won't be able to import the data into populus.

Email populus@ndp.ca if you have any questions.

Pull a Callhub Phone List from Populus



From the homepage, click on the **Reports** tab.



populus Home Contacts Casework Activities Reports E-Day Outreach

Dashboard My Reports Report Administration

Report History
Create Report

2 2 0 0 0
COMPLETED IN PROGRESS QUEUED FAILED

9:36:46 AM EST

| File | Type | File Size | Status | Date Submitted | Action |
|--|--------|-----------|-----------|----------------------------|--------|
| Marks with Leaning by Poll (Ottawa South) 2019-02-14.csv | Report | 54 KB | Completed | 2019-02-14 02:08:54 PM EST | |
| Marks with Leaning by Poll (Ottawa South) 2019-02-14.csv | Report | 50 KB | Completed | 2019-02-14 01:46:33 PM EST | |

50 Results (2)

Click **Create Report**.

populus Home Contacts Casework Activities Reports E-Day Outreach

Dashboard My Reports Report Administration

Report History
Create Report

Create Report Wizard

1 Type 2 Target 3 Generate Report

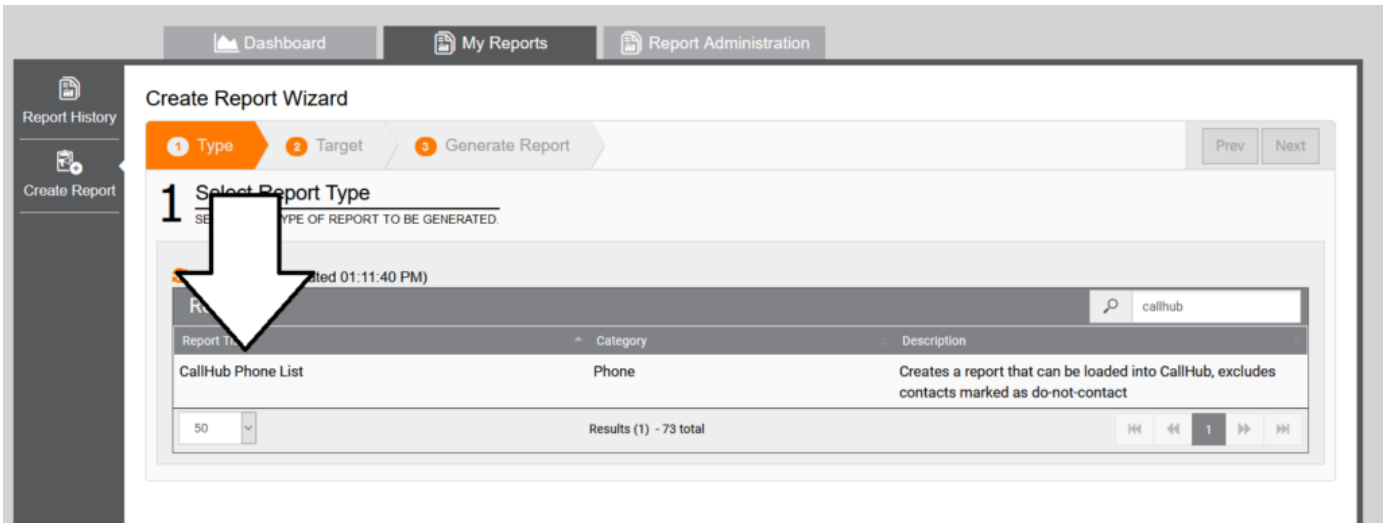
1 Select Report Type
SELECT THE TYPE OF REPORT TO BE GENERATED.

Refresh (Last Updated 10:11:46 AM EST)

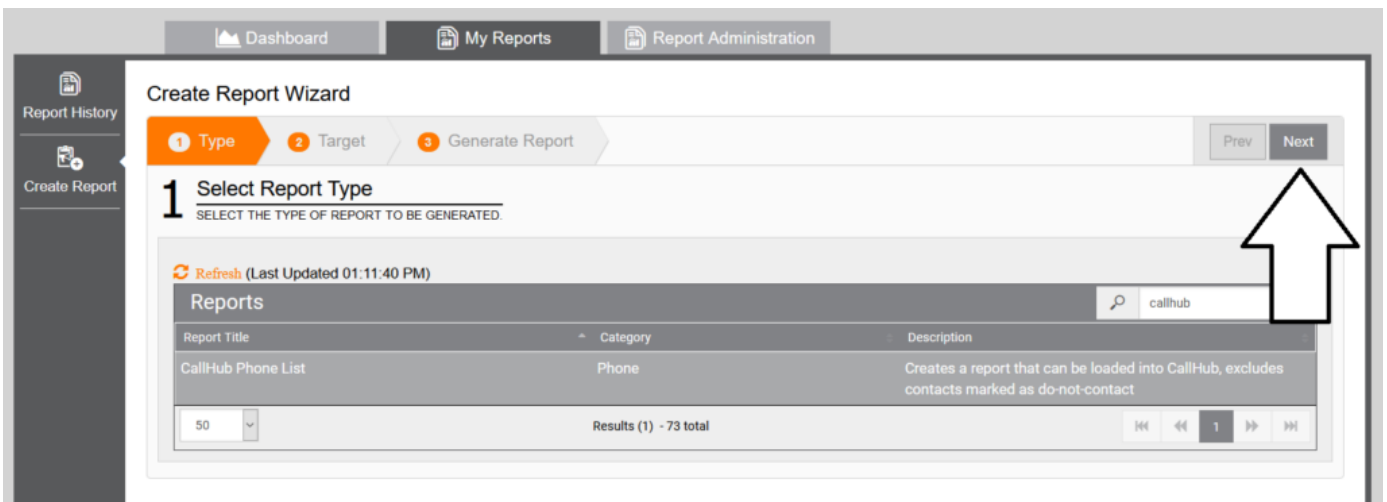
| Report Title | Category | Description |
|---|-------------|--|
| Activity Response Count | Activity | Reports the response count for a specific Activity. |
| All Active Users in All Case Offices in All Domains | Case Office | Report listing all active users (name and email) for all Case Offices for all Domains |
| All Activities in Region Answer Report | Activity | |
| All Activities in Region Answer Statistics | Activity | |
| All Enabled Admin Users All Domains | Domain | Detailed Listing of all Enabled Sysadmins and Domain Admins for all Domains |
| All Enabled Users All Domains | Domain | Detailed listing of all enabled users across all Domains. Includes first and last names and usernames. |

Search for the **Callhub Phone List** report by name by typing "Callhub" into the **search bar**.



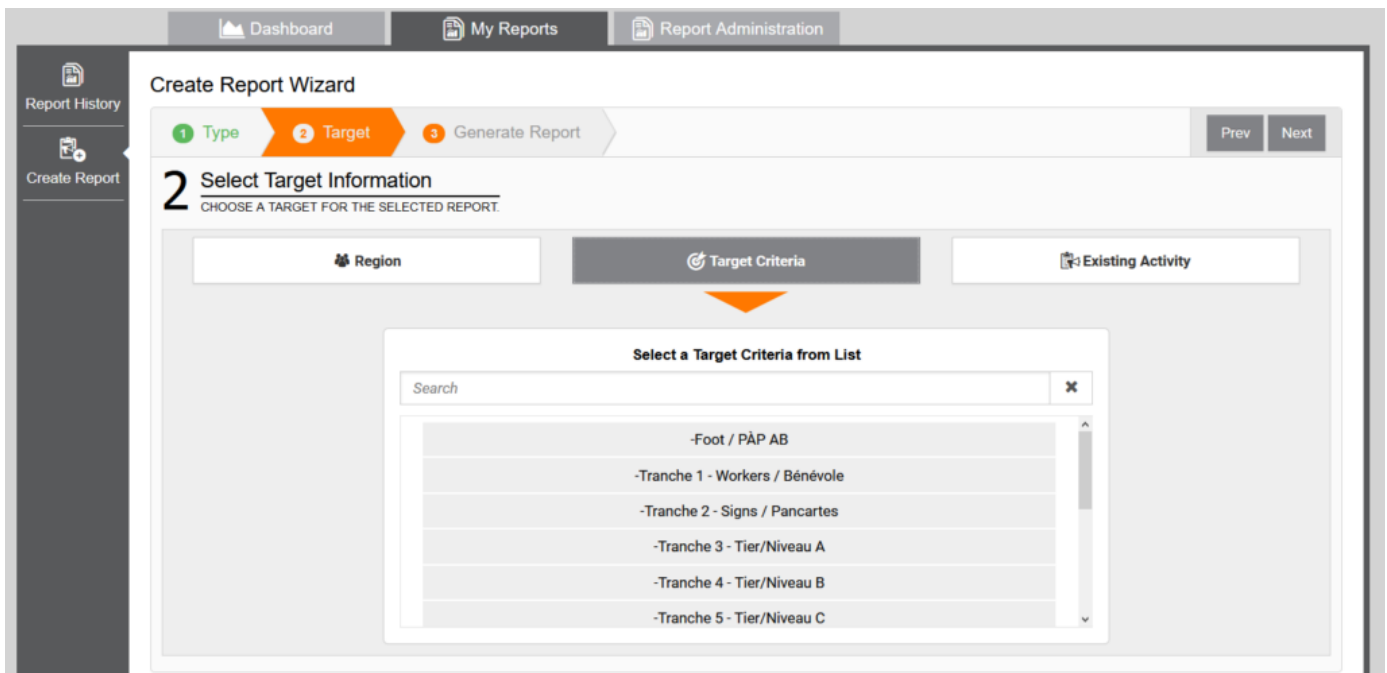


Select **Callhub Phone List** by clicking on it.



Then, press **Next**.





Now you need to decide who you want to call. The federal party has built a bunch of lists for you to get started with.

Target Criteria for Phoning

When starting a campaign, the recommended strategy on the phones is to call each of these in order:

- **Tranche 1 – Workers / Bénévole** is a list of callable uncontacted volunteer prospects
- **Tranche 2 – Signs / Pancartes** is a list of callable uncontacted people who are likely to take lawn signs
- **Tranche 3 – Tier/Niveau A** is a list of callable uncontacted Tier A contacts. Tier A contacts have been identified as much more likely to be supporters than the average person in the riding.
- **Tranche 4 – Tier/Niveau B** is a list of callable uncontacted Tier B contacts. Tier B contacts have been identified as somewhat more likely to be supporters than the average person in the riding.
- **Tranche 5 – Tier/Niveau C** is a list of callable uncontacted Tier C contacts. Tier C contacts are roughly as likely to be a supporter as the average person in the riding.

For fundraising, it is recommended to call these lists in order:

- **Donors / Don – A** is a list of people who donated in the 2015 Federal Election
- **Donors / Don – B** is a list of people who donated in other campaigns



Other target criteria for phoning:

- **Contacts with phone / Contacts avec téléphone** is a list of all people who have phone numbers who are not do-not-contact

Once you have selected a target criteria, click **Next**.

Dashboard My Reports Report Administration

Report History Create Report

Create Report Wizard

1 Type 2 Target 3 Generate Report Prev Complete

3 Generate Report

CONFIRM REPORT SELECTION(S) AND SCHEDULE REPORT.

Report Summary

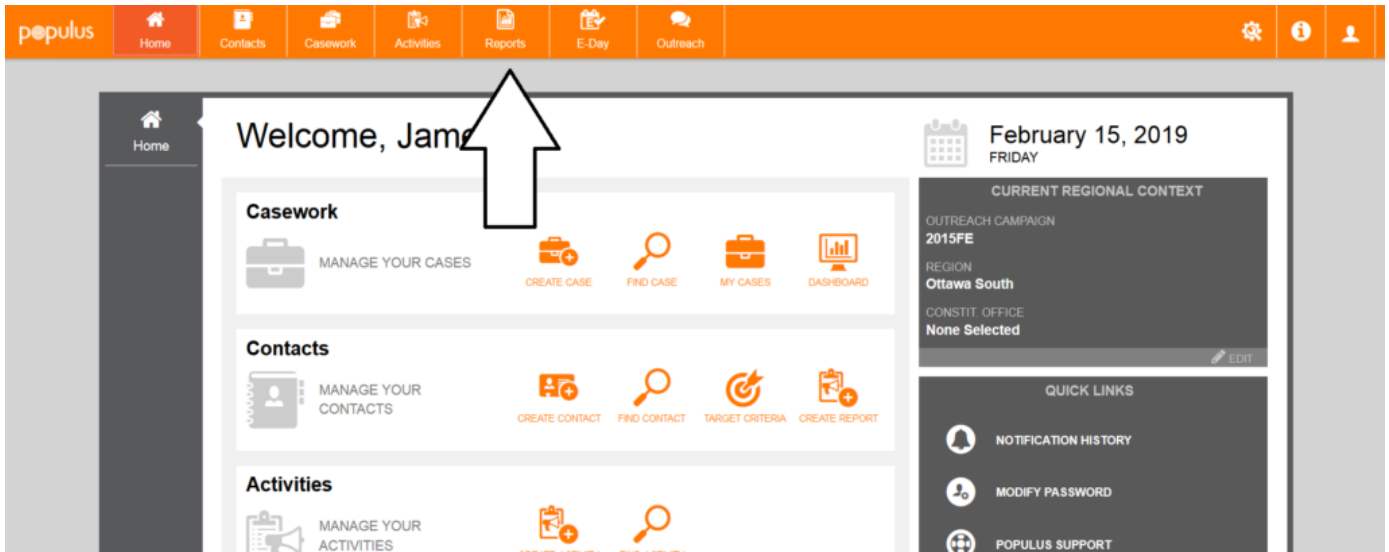
| | |
|--------------|--|
| Type | CallHub Phone List |
| Target | Target Criteria - -Tranche 3 - Tier/Niveau A |
| File Name | CallHub Phone List (-Tranche 3 - Tier/Niveau A) |
| Suffix | Append to filename: <input type="radio"/> No Suffix <input checked="" type="radio"/> Current Date <input type="radio"/> Current Date and Time |
| Email Report | Do Not Email When Report Is Done |
| Separator | Column Separator for CSV Reports <input checked="" type="radio"/> System Default <input type="radio"/> Comma |

This page gives you a few options for your report.

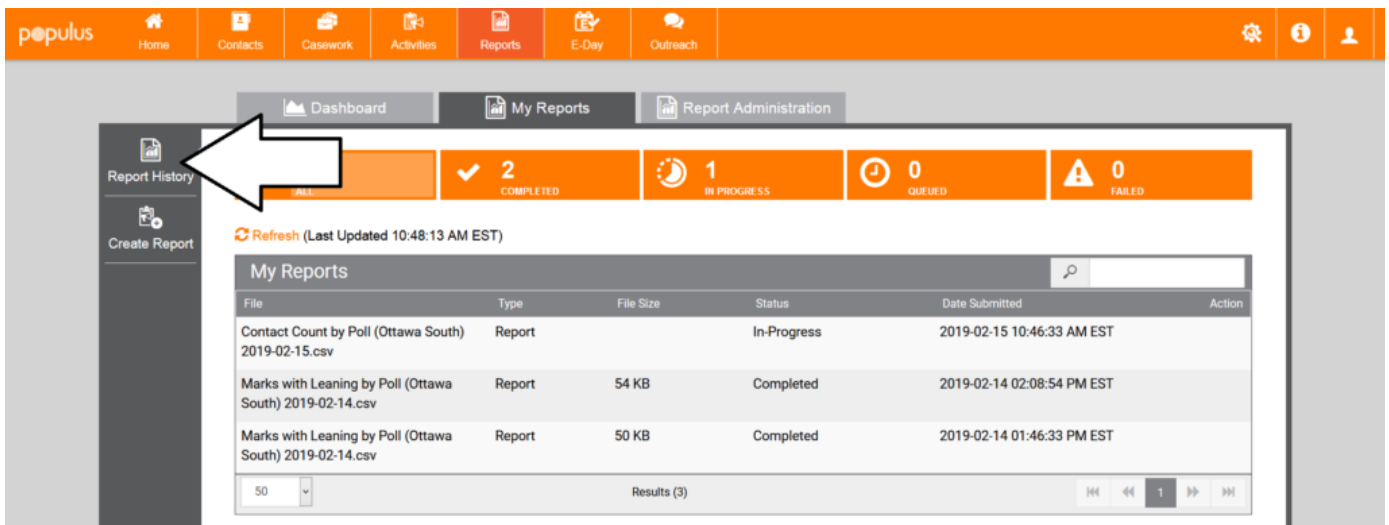
Once that's done, click **Complete** in the top right corner.

Finding and Downloading the Callhub Phone List Report





To find a report that was generated in the past, click on the **Reports** tab.



Click **Report History**

