

Update vote-by-mail status in UpVote

When your campaign receives updated absentee and vote-by-mail statuses from the state, Board of Elections, or your data provider, you can upload the data to a custom field in UpVote. Keeping this information current helps your team identify voters with mail ballots and target the right GOTV outreach.

Follow these steps to create the custom field and update vote-by-mail status correctly.



STEP 1.

Tutorial

Add Voter +

Hierarchy Graph

Create\Manage Custom Graph +

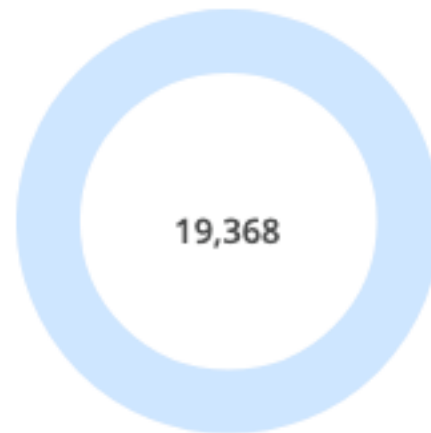
Customize Dashboard ⚙

Explore All Features ¹

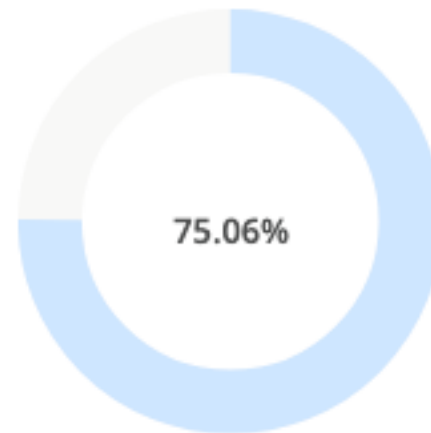
Overall Voting Percentage

Filter By Group

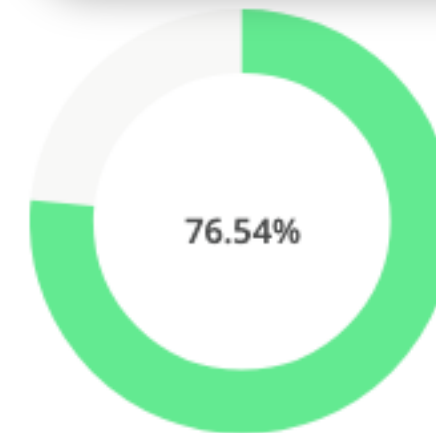
Last Updated: Jul 28, 2026 07:59 AM



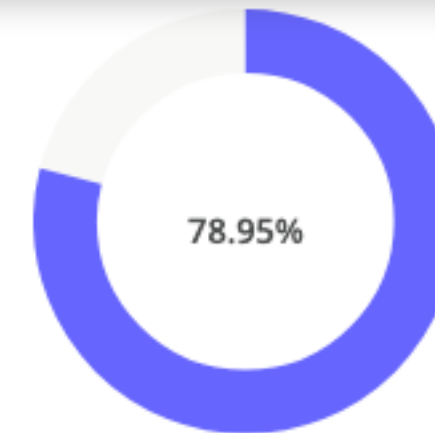
Total Voted



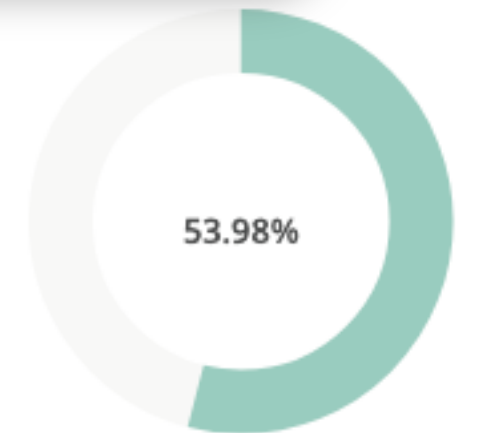
Overall Voting Percentage



Supporter Voting Percentage



Likely Supporter Voting Percentage



Undecided Voters Percentage

Enter the UpVote admin portal and navigate to **Custom Fields**

Voters Distribution

Filter By Group

Last Updated: Jul 28, 2026 07:46 AM

STEP 2.

The screenshot shows the UpVote application interface. On the left is a sidebar with the UpVote logo and a list of menu items: My favorites, Dashboard, Advanced Search, Volunteers, Custom Fields, Groups, Tags, SMS Messages, Events, Upload Center, Notifications, Callers, Phone Campaign, Newsletters, and Chat. The main content area is titled 'Add Custom Field'. It contains the following fields and controls:

- Field Type:** A dropdown menu with 'Drop Down' selected. A red arrow points to this field.
- Field Name:** A text input field containing 'Vote By Mail Status'.
- Display Options:** Four checkboxes:
 - ☒ Display in voter details
 - ☒ Display in Outreach page
 - ☐ Prompt response when adding a contact
 - ☐ Show on contact match
- New Option Description:** A text input field with a red arrow pointing to it.
- Add Option:** A grey button next to the 'New Option Description' field.
- Options List:** Two grey boxes representing options: 'Returned' and 'Requested'. Each has a red trash icon to its right.
- Save:** A blue button at the bottom left with a red arrow pointing to it.

Click “**Add Custom Field**” to open the custom field setup screen. Select Dropdown as the field type, then give the field a clear, descriptive name.

The **option descriptions must exactly match the values that will appear in the Excel or CSV file you upload**, including spelling, capitalization, and spacing. In many states, common Vote by Mail Status values include “Received” and “Returned,” but you should use the exact terminology provided by your state or data provider.

Tip: Choose a field name that will be easy for campaign staff and volunteers to understand if you plan to display the field in the UpVote app rather than use it only for internal admin tracking and reporting. We recommend displaying Vote by Mail Status in both the voter details and on the outreach page.

Note: A dropdown custom field must include at least two options before it can be saved.

STEP 3.



Expand All

Search Menu Items

★ My favorites

Dashboard★

Advanced Search★

Volunteers★

Custom Fields★

Groups★

Tags★

SMS Messages★

Events★

Upload Center★

Notifications★

Callers★

Phone Campaign★

Search voters, users or menus

Upload Center

Upload Excel/CSV File

Search...

Filters

Columns

Date

Condition

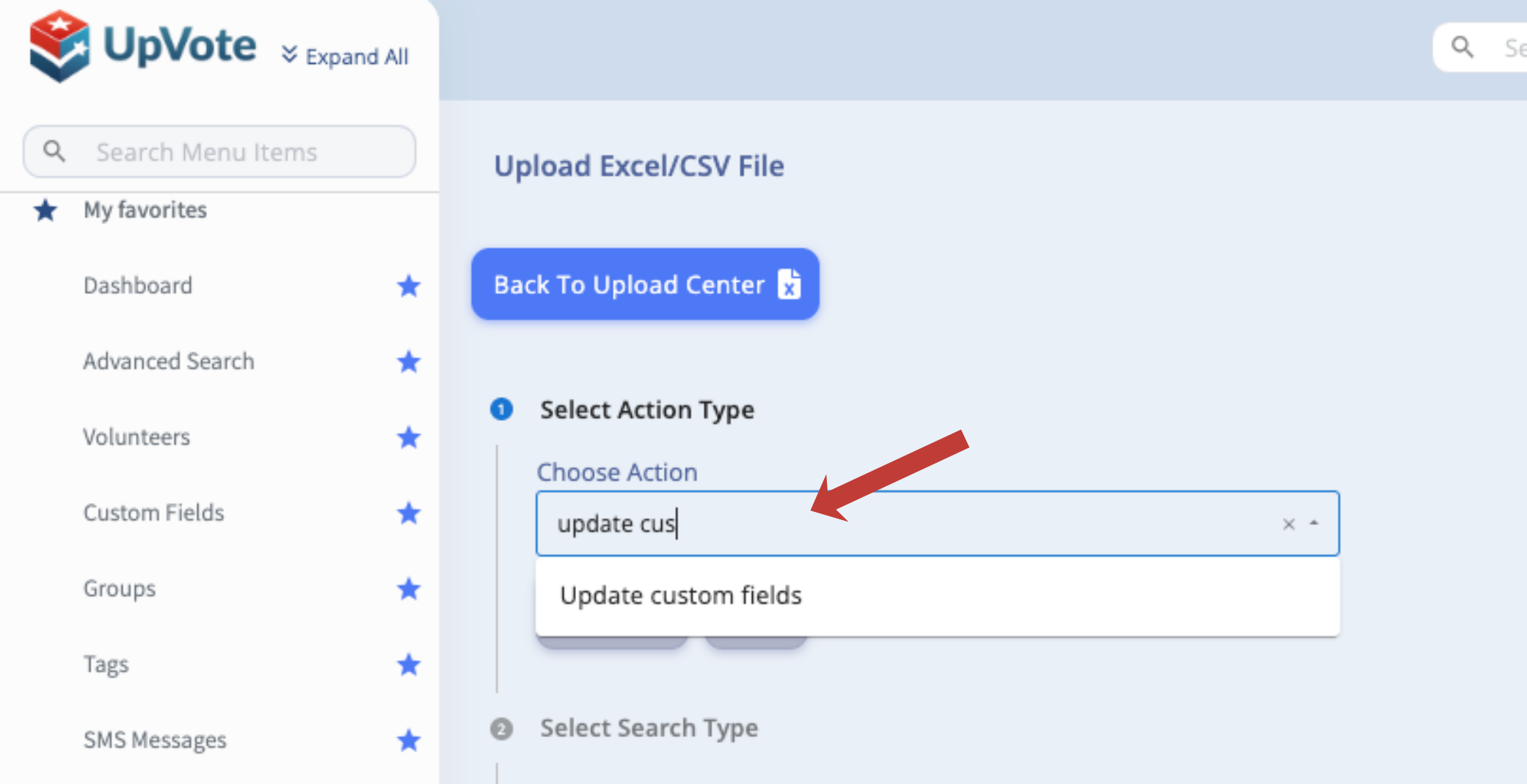
contains

Value

Filter v

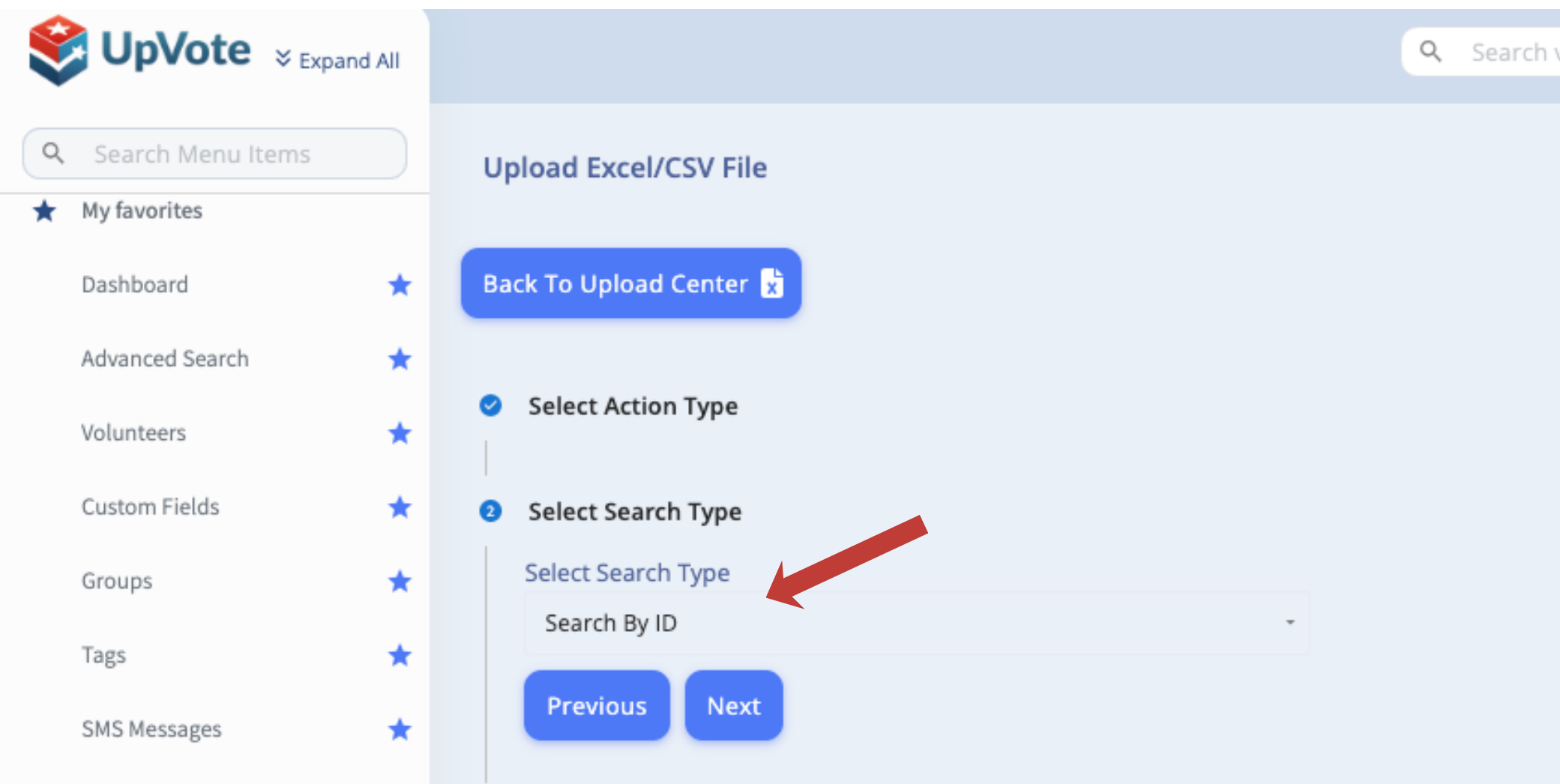
Date	Action	Status
Jun 21, 2026 04:44 AM	Associate volunteers with dynamic group	Done
Jun 21, 2026 04:41 AM	Associate volunteers with dynamic group	Done
Feb 3, 2026 12:12 PM	Add\Update voters into database	Done

Once the custom field is created, navigate to the Upload center and click **‘upload excel/CSV file’** to begin



STEP 4.

Search for the upload action
“update custom fields”
and click next



STEP 5.

Select ‘Search by ID’
and click Next

STEP 6.

Search Menu Items

★ My favorites

Dashboard★

Advanced Search★

Volunteers★

Custom Fields★

Groups★

Tags★

SMS Messages★

Events★

Upload Center★

Notifications★

Callers★

Phone Campaign★

Newsletters★

Chat★

Upload Excel/CSV File

Back To Upload Center

✓ Select Action Type

✓ Select Search Type

3 Set additional fields

4

5

6

Choose Parameter

Choose Parameter

Choose Parameter

Voted in last 4 primaries

Party Affiliation

Mail-in Ballot

Vote By Mail Status

Vote Plan

Interested in Volunteering?

Party

Select the Vote By Mail custom field you just created from the drop down options

STEP 7.

✓ Set additional fields

4 Upload Excel/CSV File

Notice:

- The first row must contain the headline.
- Changes will be updated withing a few minutes.
- You can upload files in xlsx, csv and xls formats only.
- The new data will override existing.
- To reset an existing value, enter the symbol '-' in the appropriate field. .

Choose a file or drag it here

[Download Template](#)

	A	B
1	Voter ID	Value to set
2		
3		
4		
5		
6		

Please be advised that proceeding with this action will modify your voters data. To ensure accuracy and prevent any potential errors, we strongly recommend backing up your current data. You can do this by downloading the 'All Voters' report available on the [Reports Page](#)

✓ I acknowledge the consequences associated with uploading an Excel file that will overwrite existing data. Consequently, I have ensured the preservation of the current information by creating a comprehensive backup.

Previous

Next

5 Approve the file

6 Finish

Attach your excel or CSV file here.

Note: Your file needs to match the format pictured here. It needs **column A for Voter ID** and **column B for the value to set (which is vote by mail status)**. The first row must contain the headline. All other columns to the right of column B will be ignored by the system. Be sure that the values in column B match one of the drop down options of your custom field.

Keep in mind, the **Voter IDs in your file must exactly match the Voter IDs in your UpVote database**. If an uploaded Voter ID is not found in the system, that voter's record will not be updated.

Click "I acknowledge" and then Next to upload the file. After the upload is complete, you can download an import report showing which rows were successfully processed and which were not.

STEP 8.

UpVote will display a preview of the first few rows of your file.
Review the preview to confirm that the information looks correct and that you uploaded the intended file.
If everything is accurate, click **Next**, then **Finish**.

Dashboard

Advanced Search

Volunteers

Custom Fields

Groups

Tags

SMS Messages

Events

Upload Center

Notifications

Callers

Phone Campaign

Newsletters

Chat

Self-Registration

Smart Match

Action Feed

Features

Settings

Voters Management

Management

Back To Upload Center

Select Action Type

Select Search Type

Set additional fields

Upload Excel/CSV File

5 Approve the file

File processing complete. Below are the first rows.

Did you know? You can drag the columns to the desired location if they are not correctly positioned. For further guidance, please watch the video.

Show Video

	A	B	C	D	E
1	Voter ID	Value to set	Unused Column 0	Unused Column 1	Unused Column 2
2	21432425432	Requested	Jen	Simmons	123 Main
3	325433242	Returned	Zoey	Harris	Sepulveda
4	3425467564	Requested	Benjamin	Brown	
5	5676834543	Returned	Antonio	Rodriguez	
6	324354354	Returned	Amy	Chan	

Upon preliminary analysis of the initial rows in the Excel file, the information appears to be valid. However, it is important to note that this assessment is based solely on the first few rows. Please ensure a comprehensive review of the entire data prior to finalizing the upload.

Previous

Next

6 Finish

STEP 9.

Search voters, users or menus

1

Smith Campaign Demo

Upload Center

Upload Excel/CSV File

Idan

Search...

Manage Columns

Export To CSV

66 records displayed from 66

Filters

Columns

Date

Condition

contains

Value

Filter value

+ Add filter

Clear filters

Date	Action	Status	Uploaded By	Upload Details
Jul 28, 2026 08:32 AM	Update custom fields	Done	Idan	Upload Details
Jun 21, 2026 04:44 AM	Associate volunteers with dynamic group	Done	Idan	Upload Details
Jun 21, 2026 04:41 AM	Associate volu			
Feb 3, 2026 12:12 PM	Add\Upd			
Jan 29, 2026 05:31 AM	Add\Upd			
Jan 29, 2026 05:31 AM	Add\Upd			
Dec 17, 2025 11:18 AM	Create volunteers	Done	Idan	Upload Details
Dec 15, 2025 04:31 AM	Create Volunteers	Done	Idan	Upload Details

You will be returned to the Upload Center. Once the upload status changes to “Done,” click “**Upload Details**” in the rightmost column.

From there, you can download the import report to see which rows were updated successfully and which rows encountered an error.